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# FELTHAM & ASSOCIATES

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CHARTERED PROFESSIONAL  
ACCOUNTANTS

## Portal Client User Guide

Last Updated: 12/3/2016

## About CCH Portal

Portal is a web-based application used for secure file transfers and continued access between Feltham & Associates, Charter Professional Accountants and our clients. For a client, Portal is a web-based interface that only requires the installation of Microsoft Silverlight for use.

Your Portal User ID and login information will be provided via email. All documents made available for continued access such as a tax return or financial statement will remain on your portal for a period of two (2) years in accordance with Feltham & Associates's record retention and portal use policies.

## System Requirements

- Portal is built on a Microsoft Silverlight platform and a user may be prompted to install Silverlight from Microsoft's website. The installation typically takes less than one minute to complete and is completely safe.
- Portal will support all browsers on PC and Mac that are compatible with Microsoft Silverlight 4.
- A complete list of browsers and operating systems that support Silverlight 4 can be found at <http://www.microsoft.com/getsilverlight/locale/en-us/html/installation-win-SL4.html>.

## Internet Explorer



Internet Explorer users are required to add the portal URL to Trusted Sites.

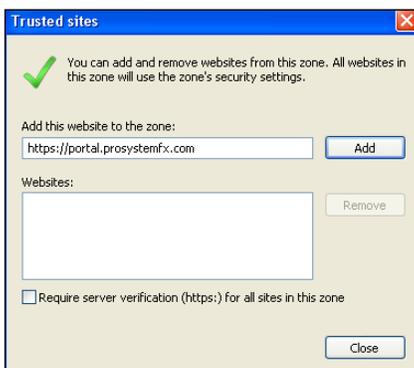


Internet Options



### Internet Explorer Settings

1. Open Internet Explorer and browse to <https://cchportal.ca/Portal/#Default>
2. In Internet Explorer, select Tools, Internet Options, and Security, then click Trusted Sites. See #3 below for the final step.



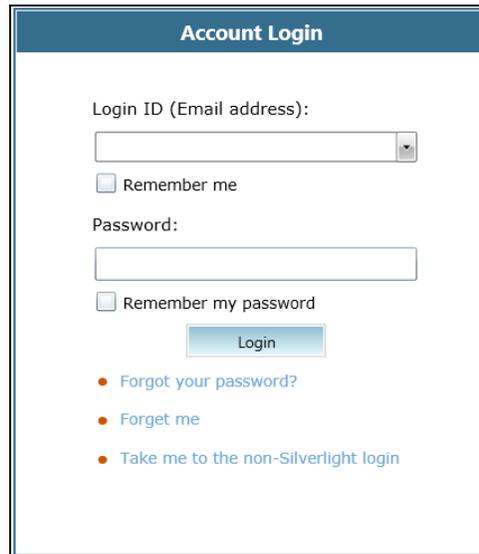
Trusted Sites

3. Click Add to move the Portal URL to the trusted sites zone, then click close.

## Quick Start Guide

### Portal Login

Launch your internet browser and browse to <https://cchportal.ca/Portal/#Default>



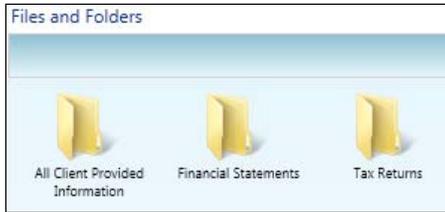
Portal Login



### Login Tips

- Refer to the emails received from the firm for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- You will be required to change your password upon logging in for the first time and answer at least one security question. Your security questions can help you access your portal if you ever forget your password.
- Your new password; which may be from 8 to 32 characters must contain at least one alpha character, one numeric character, one special character (e.g. !, @, #, etc.), and is case sensitive.
- Your password may be reset at anytime by clicking "[Forgot your password?](#)"
- If you cannot, or prefer not to, install Silverlight on your machine, click "[Take me to the non-Silverlight login](#)" to use our lightweight version of the Portal that does not require Silverlight. Advanced features are not available from the non-Silverlight version of Portal.

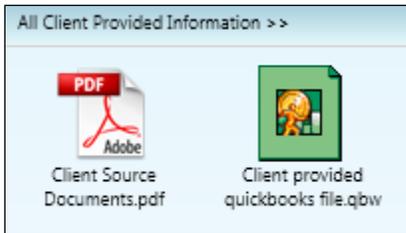
## Download files from Portal



**Files and Folders**



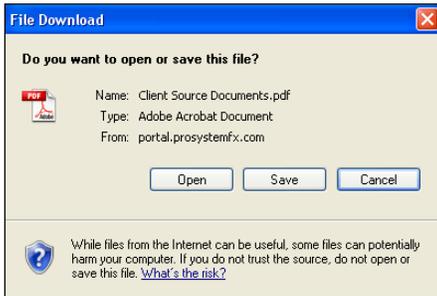
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



**Portal Documents**



A simple way to view or save a file is to double-click on the file name. Double-clicking on a file will display the file download screen, displayed below.



**File Download**



Click open to view the file or save to download\save a copy to your computer or network. When a file is downloaded a copy is created and does not affect the file on your portal.



It is recommended to download\save a copy of your deliverable items from Portal as most files will not remain there indefinitely. The firm can provide more detail regarding how long files will be accessible via Portal.

## Add Files to Portal

Recent Portals

Enter portal name

Portals

1 Smith Properties, LLC

Saved searches

Smith Properties, LLC

Announcements

Portal Info

Portal Users : 3  
Files : 0

Files and Folders

Tax

3 Add Files

4 Upload Files

View

2 Smith Properties, LLC

Tax

Accounting

2012 Tax Documents.pdf

Connected to Portal Server

### Add Files



### Steps to Add Files to Portal

On the Portal Home page:

1. Select a portal (only for those users that have access to multiple portals)
2. Select the file location (folder)
3. Click  to select file(s) via Windows Explorer or Drag and Drop files from your computer to the Files and Folders section
4. Click  to upload the file(s) to Portal

## The Local File Menu

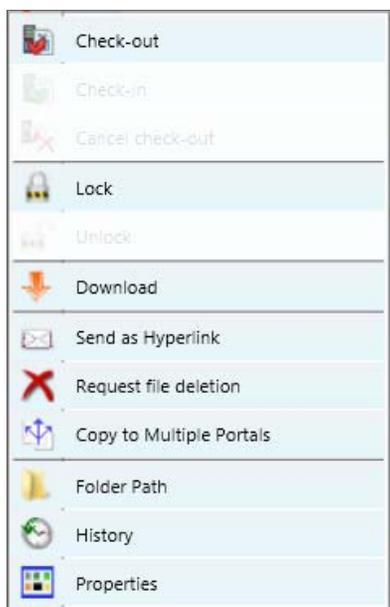
- The Local File Menu contains several options for modifying and working with files.



Right-click on any file to access the Local File Menu for that file.



### Local File Menu Key Features



Right-Click Menu

Check-out	Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.
Check-in	Add the previously checked-out file back to Portal to reflect any changes.
Cancel Check-out	Check-in a previously checked-out file as if the Check-out never occurred.
Lock\Unlock	Prevent file from being checked-out or deleted.
Download	View or save file (same as double-click on file name).
Send as Hyperlink	Send encrypted link via email. The recipient must be able to log-in to Portal in order to view the file.
Request file deletion	Requests file deletion by the firm.
Copy to Multiple Portals	Copies a file to other portals that the Portal User has access to.
Folder Path	Move file to a new folder.
History	View each action performed to the file and the user who performed the action.
Properties	Rename or change the folder location for a file.

## Quick Reference Guide

### Portal Login

- Launch your internet browser and browse to <https://cchportal.ca/Portal/#Default>
- Enter your Login ID and your temporary password. These can be found in the email you received from the firm.
- You will be required to change your password upon logging in for the first time and answer at least one security question.

### Add Files to Portal

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the uploaded files should be stored.
- Click the Add Files button to select files or drag and drop files from your computer to the selected folder location.
- Click the Upload Files button.

### Download Files from Portal

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the files you want to download are located.
- Right-click the file and select Download.

Icon Legend		Keys	Quick reference to the key aspects of a particular function
		Tip	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Warning	Important warnings about a function