

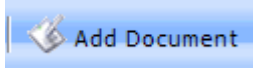
# CCH Portal – Navigation Instructions

This is the Home screen that you will see when you login to CCH Portal. The following pages include instructions for adding a document to portal so we can view/edit it and downloading files from Portal for your own copies or to e-mail to other people.

The screenshot displays the ProSystem fx Client Portal interface. The top navigation bar includes the portal name 'GV Food Services Inc' and the user 'david.grewal@telus.net'. The main content area is titled 'Document List' and features a search sidebar on the left and a document table in the center. The table lists various documents, all with a 'Published' status and 'R' mode. The document names include 'Final FS' and 'Final T2' files with specific identifiers.

File App	Keyword	Publication Status	Mode	Document Name	File Size	Cabinet	Folder	
(All)		(All)	(All)			(All)		
<input type="checkbox"/>			Published	R	<a href="#">Final FS_073109.pdf</a>	979	Document Cabinet	Financial Statements
<input type="checkbox"/>			Published	R	<a href="#">Final T2_073109.pdf</a>	410	Document Cabinet	Tax Returns
<input type="checkbox"/>			Published	R	<a href="#">CRA Consent Form 031209.pdf</a>	171	Document Cabinet	Tax Correspondence
<input type="checkbox"/>			Published	R	<a href="#">Final FS_073108.pdf</a>	247	Document Cabinet	Financial Statements
<input type="checkbox"/>			Published	R	<a href="#">Final T2_073108.pdf</a>	499	Document Cabinet	Tax Returns
<input type="checkbox"/>			Published	R	<a href="#">Final FS_073107.pdf</a>	257	Document Cabinet	Financial Statements
<input type="checkbox"/>			Published	R	<a href="#">Final FS_073105.pdf</a>	258	Document Cabinet	Financial Statements
<input type="checkbox"/>			Published	R	<a href="#">Final FS_073106.pdf</a>	260	Document Cabinet	Financial Statements
<input type="checkbox"/>			Published	R	<a href="#">Final T2_073106.pdf</a>	676	Document Cabinet	Tax Returns
<input type="checkbox"/>			Published	R	<a href="#">Final T2_073105.pdf</a>	558	Document Cabinet	Tax Returns

## Adding a document

1. From the Home screen (above), click on  (top right portion of the screen). That will bring up the following screen:

**Add Documents to Portal** Document List

**Client Information** **Set Document Properties**

Client Name **GV Food Services Inc** Portal Area **Collaboration** Cabinet Name **Document Cabinet**

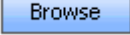
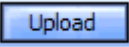
Keyword  Folder Name **Client Provided Information**

[Apply to Selected](#)

**Advanced Upload**

<input checked="" type="checkbox"/>	Filename	Keyword	Cabinet	Folder
<input checked="" type="checkbox"/>	Items for follow-up.doc		Document Cabinet	Client Provided Information

[Browse](#) [Remove](#)

2. Click on  and browse within your computer to find the document you wish to add. Select it and click Open. Repeat to add additional documents.
3. Under “Cabinet” select Document Cabinet from the drop down list.
4. Under ‘Folder’ select:
  - a. Client Provided Information – if you are adding year-end working papers or other documents for our review
  - b. Accounting Data – if you are adding data files from your accounting software
5. Click  to complete the process.

### Downloading a file

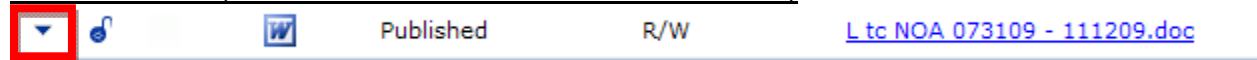
#### Read only files (that have R beside the Document Name)




- Read-only files can only be viewed or saved so you can keep a copy or e-mail it to someone else (e.g. e-mail your financial statements to a banker for a loan application).
1. Click on the file hyperlink (e.g. [Final T2 073109.pdf](#) ).
  2. Portal will warn you that you cannot edit the file (since it is set to read-only), click Yes.
    - a. Click Open to view the file, or
    - b. Click Save to save it for your records or e-mail to someone else.

### Checking Out a file

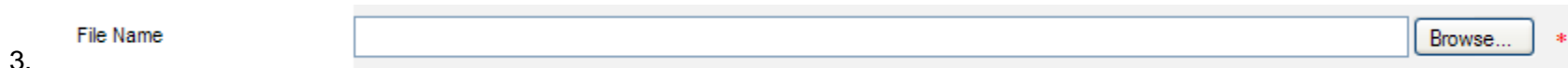
#### Read-write files (that have R/W beside the Document Name)

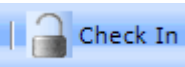


- Checking Out a file allows you to make changes to it (e.g. if we send you a spreadsheet for your rental to input the income and expense amounts).
1. Click on the Down Arrow to the far left of the Document Name
  2. Select Check Out. Ignore the other options on the next screen and click  at the top-right corner.
  3. Click Save on the next window and you will be able to open the file to edit it.
  4. If you want to cancel your changes after Checking Out, select the Down Arrow and click Cancel Check Out

### Checking In a file

- Once you have edited the file you checked out, it will have to be checked in so we can use it.
1. Log in to CCH Portal and click the Down Arrow to the far left of the Document Name (like you did you Check Out the file).
  2. Click Check In



3. Click on the Browse button and find the file that you have Checked Out. Select it and click Open.
4. Click  at the top-right corner.

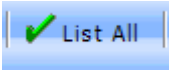
### Other CCH Portal Options

- If there are many files in your Portal you can filter for a certain type of document

File App	Keyword	Publication Status	Mode	Document Name	File Size	Cabinet	Folder
(All) ▼		(All) ▼	(All) ▼			(All) ▼	▼

1. On the Document Bar click on the drop down list under Cabinet – select Document Cabinet.
2. On the Document Bar click on the drop down list under Folder – select the folder for the type of file you are looking for.

3. Click on the  button at the top-right corner to filter by only files in that Folder.

4. To return to viewing all files in the Portal , click  .

If you ever need assistance with navigating in CCH Portal or other technical issues, please contact your Berris Mangan professional or e-mail us at [portal@berrismangan.com](mailto:portal@berrismangan.com).