



Document Portal User Guide

updated October 9, 2007

Getting Started

Logging in as a Client User

To log in to the portal, do the following:

1. Open Internet Explorer
2. There are 2 ways to access the Portal.
 - a. In the address bar of a web browser, type: <http://portal.ppandco.com>.
 - b. You can also reach the Portal through our firm website at <http://www.ppandco.com>. Click **Tools** in the navigation menu.
3. Enter your user ID, password, and portal ID.

**Note:* Passwords are case sensitive.

Clicking **Reset** clears the fields on the login form.

Logging out of Client Portal

Click the **Log Out** link, located in the upper right corner of the *User Home* page, to exit the portal.

Creating a Desktop Shortcut

Creating a shortcut allows you to access a portal by double-clicking an icon on your workstation desktop. This eliminates the need to enter a URL in Internet Explorer each time you access a portal.

To create a desktop shortcut, do the following:

1. Right-click on the workstation desktop to display the desktop local menu.
2. Select **New**, then select **Shortcut**. The *Create Shortcut* wizard displays.
3. Type in <https://portal.ppandco.com>

4. Click **Next**
5. Enter a name for the shortcut (example: PPS Document Portal)
6. Click **Finish**. The shortcut icon displays on the workstation desktop.

User Home Page

Using the Client Portal User Home Page

As a portal user, you have a home page that displays information specific to that user, such as a list of documents currently checked out and the details of the user's last document discussion. From here, you can access many Client Portal functions.

The home page includes three major components, each of which is subdivided into smaller sections. These components are the navigation bar, the user workspace, and the cabinets and folders section.

In addition to these major components, there are smaller objects on the home page that can help you work efficiently in the Client Portal. They include the Quick Search bar, a hyperlink to the Client Portal Help Files, and the logout icon. These items are described in greater detail in the sections below.

The Navigation Bar

The **Search** section contains the *Document* link which opens the *Search* page, where you can search for document based on its attributes (e.g., title, keyword, or description) or based on text in the document.

The User Workspace

The user workspace display information about the current user's recent portal activity. The workspace includes three panes:

- **Check Outs.** Displays information about documents you have currently checked out.
- **My Status.** Displays the date and time of the current login and links to pages where you change your personal information and password.
- **Document Discussion.** Displays information about and links to the last three discussions you originated.

Cabinets and Folders

Documents are located in the Collaboration Area. Within the area, documents are organized into cabinets and folders. A cabinet can contain multiple folders.

Note: Click **Cabinets and Folders** to collapse or expand the Cabinets and Folders components as necessary.

To view the contents of cabinets and folders, do the following:

1. Select **Collaboration Area** from the drop-down list in the *Cabinets and Folders* area.
2. Click **Go**.
3. Click the **downward-pointing double arrow** beside a cabinet name to expand the cabinet. A list of folder in the cabinet displays. The number in parentheses after a folder name indicates the number of documents in the folder.
 - a. **Note** : To close a cabinet, click the upward-pointing double arrow beside its name.
4. Click a folder name to open the document list for the folder.



Other Objects on the User Home Page











The following objects on the *User Home* page provide additional functionality:




- **Log Out Link** Identifies the link to log you out of the Client Portal
- **Quick Search bar** Allows you to search for a client areaw document from any portal page.
- **Help link** Opens the online Help files for Client Portal

Document Lists

Document lists display information about the documents available to you in the portal. Details about each document are conveyed using icons and text.

- **Local Menu icon**  Accesses the local menu for a particular document.
- **Program icon**  Indicates the application that is used to open the file. (The icon that displays depends on the document file type.)

Icon	File Extension	Application file type
	msg	Microsoft Outlook
	pub	Microsoft Publisher
	ppt	Microsoft PowerPoint
	xls	Microsoft Excel
	doc	Microsoft Word
	vsd	Microsoft Visio
	pdf	Adobe Acrobat or Adobe Reader
	htm or html	Internet Explorer or other Web browser software
	Ink	Hyperlink to another file or to a Web page
	(varies)	Unknown file type or a file that is using this icon generically in Document Client Portal

- **New icon**  Indicates the a document was recently added to the portal.
- **Discussion icon**  Indicates that there is a discussion associated with a document.
- **Document Discussion Attached.**  A document discussion was created and the document is attached with the email.

Working with Documents

Viewing and Downloading Documents

On a *Document List* page, simply click on the document hyperlink. You can also click the **Local Menu** icon for a document, then select **Download**. A *File Download* dialog displays.

You can then do one of the following:

- Click **Open** to launch the application associated with the file and open the document.
- Click **Download** to open a *Save As* dialog and download the file to a local drive.
- Click **Cancel** to exit the *File Download* dialog without downloading or opening file.

Creating Document Discussion Topics

1. On a *Document List* page, click the **Local Menu** icon for a document, then select **Discussion**. The *Post a Message* page displays.
2. Enter a subject in the *Subject* field.
3. In the *To* and/or *CC* fields, enter the email addresses of persons to receive email notification of the new discussion.
4. Enter the text of the message in the *Message* field.
5. By default, the *Send Email* and *Attach Documents with Email* boxes at the top of the page are checked. These selections cause an email message with an attached file to be sent to the individuals entered in the *To* and *CC* fields. To post the discussion with sending emails, clear the boxes for *Send Email* and *Attach Documents with Email*.
6. Click **Post** to post the message and send any associated emails with attachments. The *Document Discussion* page displays.

Note: If a document is attached to an email, the *Document Discussion Attachment* icon displays in the document list next to the document name.

7. To view the new message, select the subject from the *Subject* drop-down list. The text of the message displays in the table at the bottom of the page.

* If you have questions or comments on our Document Portal, feel free to contact us at 408-287-7911.