

Moss Adams Client Portal

Client User Guide



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About Moss Adams Client Portal

Moss Adams Client Portal is a tool that may be used to facilitate the transmission of sensitive data files between you and Moss Adams. This tool encrypts data during transfer and while at rest within the Moss Adams Client Portal. Because of this, security is vastly improved over that of general internet transmissions such as e-mail. By accessing this system, you are agreeing to the terms and conditions of the Portal Access Agreement accessible through a link on the portal's login page. If you do not agree to such terms and conditions, you should not access this system.

Client Portal Highlights



File Transfer Folder:

- Contains files uploaded by you and Moss Adams, for use during an engagement.
- Both you and Moss Adams can upload to and download from this folder.
- Files remain for **60 days** after they are uploaded and are then automatically deleted, if not deleted by a user earlier.



Final Deliverable Folder:

- Contains final deliverables uploaded by Moss Adams, such as final tax returns, issued financial statement reports, etc...
- Both client user and Moss Adams can download from this folder.
- Only Moss Adams can upload to this folder.
- Files remain for up to **2 years** after they are uploaded and are then automatically deleted, if not deleted by a Moss Adams user earlier.



Client Roles:

- Client Portal User (created by a Client Administrator or a Moss Adams user):
 - See only those folders to which they are assigned.
 - Upload and download documents to and from their assigned File Transfer Folder(s).
 - Download documents from their assigned Final Deliverables Folder(s).
 - Create sub-folders within their assigned File Transfer Folder(s).
 - Delete sub-folders and files they added.
 - See list of individuals with access to their assigned folders.
 - Customize frequency of e-mail alerts (real-time vs. periodic summary).
- Client Administrator (created by another Client Administrator or a Moss Adams user):
 - The Client Administrator is the primary client user who manages portal access for others in your organization. The Client Administrator should maintain strong controls over access to the portal.
 - All abilities of a Client Portal User listed above.
 - Add and remove user access to their assigned File Transfer Folder(s).
 - Delete files and folders created by other users.

Browser Compatibility

Moss Adams Client Portal is accessible through most Web browsers. For optimal performance, use of one of the supported internet browsers listed below is recommended:

- **Microsoft Internet Explorer (Versions 8-11)**
- **Mozilla Firefox (Latest version)**
- **Google Chrome (Latest version)**

The instructions in this guide refer to Microsoft Internet Explorer 10. Other Web browsers may respond differently when you double-click on a file name, for example; however, this will not affect your ability to upload or download files.

Getting Started

Activate Account

A link to activate your user account and create a password will be sent to you by e-mail (example below).



1. Click the **Click here to activate your user account** link.
2. Create a password that contains a minimum of eight characters and includes at least one uppercase letter, one lowercase letter, and one numeral.
3. Navigate to the login screen <https://mossadams.sharefile.com/> and login using the password you created.

Two-Step Verification

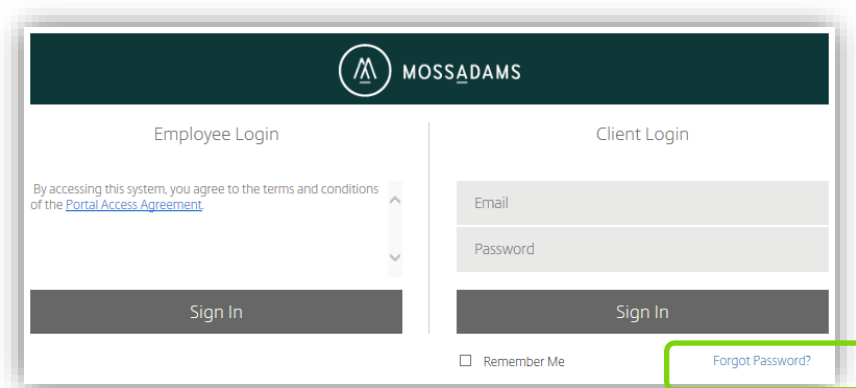
To further enhance the security of your user account, you may choose to enable Two-Step Verification. Enabling Two-Step Verification will utilize your phone to provide an extra layer of security for your username. After you log in, you will be asked to enter a verification code that will be sent to your phone via text message (SMS) or voice call.

To enable Two-Step Verification:

1. Navigate to the login screen <https://mossadams.sharefile.com/> and login using the password you created.
2. Click the **Settings** link (located in the left navigation bar), **Personal Settings > Two-Step Verification**.
3. Click the **Enable** button.
4. Select your **Country**, enter your **Phone Number**, and choose **Text Messaging (SMS)** or **Voice Call**.
5. Click the **Send** button.
6. You should receive a **verification code** in the manner you select (text message or voice call).
7. Enter the Citrix verification code in the **Enter Code** box and click the **Verify** button.
8. You have successfully enabled Two-Step Verification, click **Next**.

What to do if you forget your password

1. Navigate to the login screen and click **Forgot your Password?** Below the login boxes.



2. Enter your e-mail address and click send.
3. A link to create a new password will be sent to you by e-mail.
4. Click the **Reset your password now** link.
5. Create a new password with criteria outlined in step 2 of Activate Account above.
6. Navigate to the login screen <https://mossadams.sharefile.com/> and login using your new password.

Navigation



Once logged into the Moss Adams Client Portal, take note of a few key areas:













- **Folders**
 - This is where you will find all folders to which you have access.
- **Favorite Folders**
 - Click the ☆ star icon next to any folder to add it to your Favorites list for quick access to frequently used folders.
- **My Settings**
 - Using the **Settings > Edit Profile** path (located on the left navigation bar), you may adjust several settings including your time zone and frequency of e-mail alerts.

Managing Files and Folders

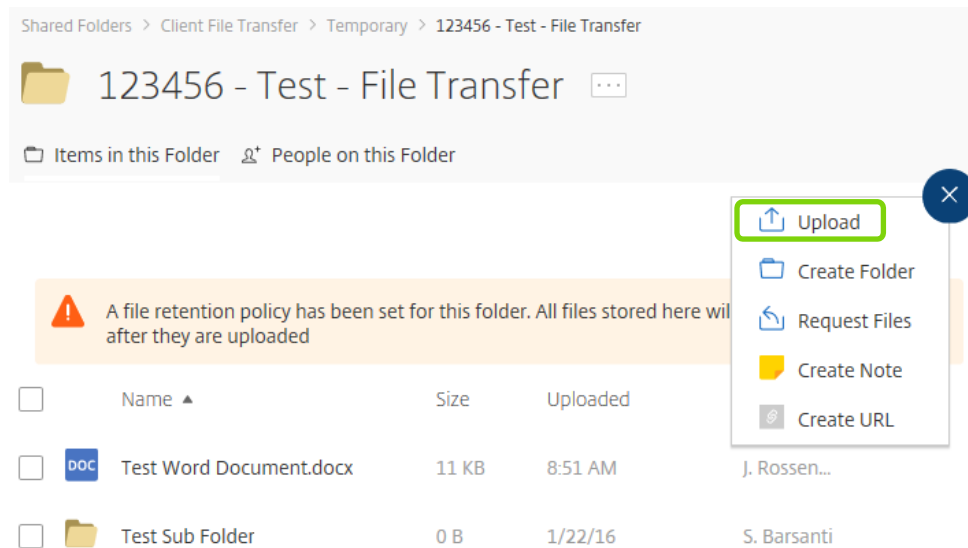
Uploading Files

1. Click on the name of the folder you want to upload file(s) to.

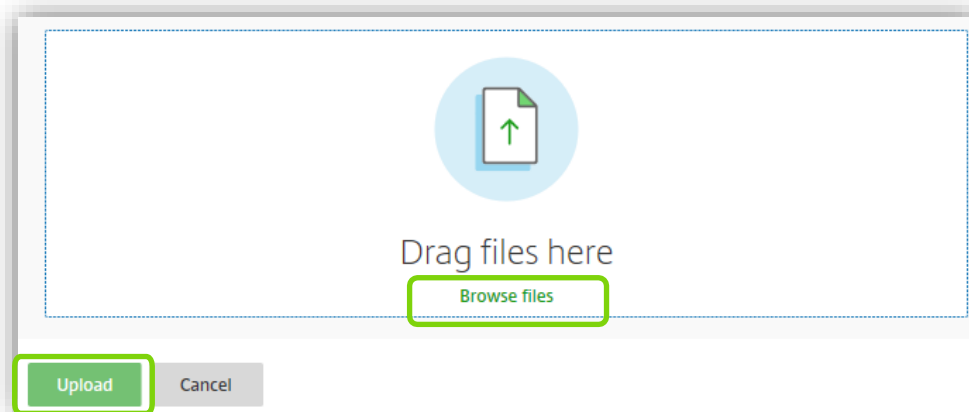
View:  

	Title ▲	MB	Uploaded	Creator
☆ 	123456 - Northwest Bank - ... 	0.03	8/26/14 9:06A	J. Rossenbach
☆ 	123456 - Northwest Bank - ... 	0.85	8/26/14 8:48A	J. Rossenbach
☆ 	555555 - Client XYZ - File T... 	0.18	10/23/14 11:45A	J. Rossenbach
☆ 	555555 - Client XYZ - Final... 	0.00	10/23/14 11:56A	J. Rossenbach
☆ 	987654 - Test Client - File T... 	0.00	10/3/14 7:58A	J. Rossenbach
☆ 	987654 - Test Client - Final... 	0.03	10/3/14 7:59A	J. Rossenbach

- Click the **Access Button**  and select **Upload**.



- Click **Browse Files** and select file(s) in the dialog window that appears, or drag the file(s) into the **Drag files here** box. Then click **Upload**.



- The file(s) will then appear in the folder that you specified.

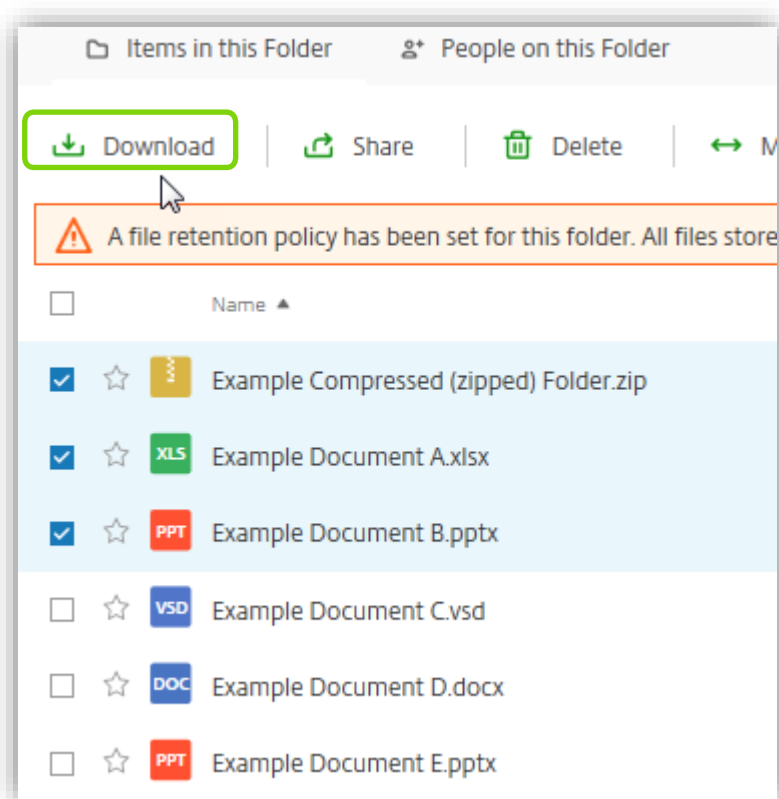
If you do not see the **Upload** button, you may not have upload permissions on the selected folder. For assistance regarding the File Transfer Folder, contact your organization's Client Administrator for the Moss Adams Client Portal, or a member of your Moss Adams client service team; only Moss Adams can upload to the Final Deliverables Folder).

Files can be compressed into a single .zip file, and then uploaded in the zip format. To do so, on a Windows 7 or later PC, select all of the files you would like to upload into a Windows folder, right-click the Windows folder, and then choose **Send to, Compressed (zipped) folder** and upload the .zip file that is created.

Downloading Files

To download a **single file**:

1. Click on the folder containing the file you would like to download.
2. Perform one of the following:
 - Option I – **Click the file's name** or **icon** to preview the document, then select **Download**.
 - Option II – **Check the box** to the left of the magnifying glass icon 🔍 and then click the **Download** link at the top of the checkbox column.



3. Follow your Web browser's prompts to **Open or Save** the file.


To download **multiple files**:

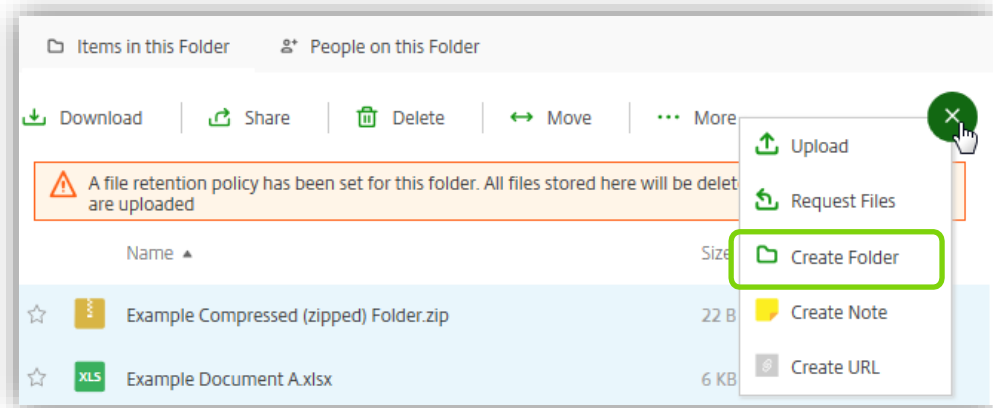
1. Click on the folder containing the files you would like to download.
2. **Check the boxes** to the left of the ☆ star icon of the files you would like to download and click the **Download** button at the top of the checkbox column.
3. Follow your Web browsers prompts to **Save** the .zip file.
4. On a Windows 7 or later PC, **right-click** on the .zip files and choose **Extract All**.
5. **Choose** the location where you would like the files extracted to and click the **Extract** button.

If more than one file is downloaded at the same time, the files will be downloaded into a .zip file format. The .zip file will be named according to the Moss Adams Client Portal folder that you are downloading from.

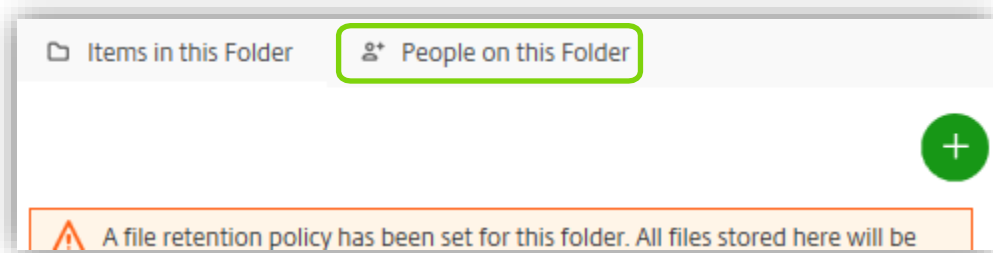
Subfolders: Creating and Managing Access

The subfolder function can be used to organize the contents of folders and customize permissions at the subfolder level. Only users with upload permissions may create subfolders. Create a subfolder:

1. Login to your Moss Adams Client Portal Account
2. Navigate to the Folder where you wish to add a subfolder and click on its folder name.
3. Click the **Green Access Button**  and select **Create Folder**.



4. Enter a Folder Name, and a description if desired, for this new subfolder in the dialogue window that appears.
5. Edit user access and customize their access on the **People on this Folder** tab as appropriate.

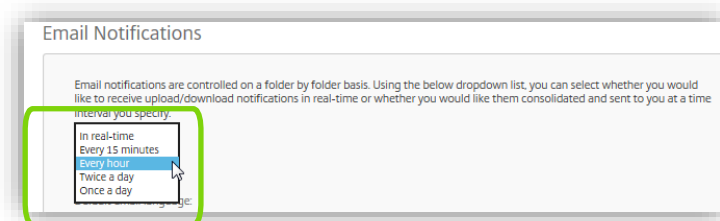


Note: Any folder that you create will automatically inherit the permissions of its parent folder; however, they can be changed through the **People on this Folder** tab within the subfolder.

E-mail Alerts

To adjust your **e-mail alert frequency**:

1. Click the **Settings** link (located in the left navigation bar), **Personal Settings > Edit Profile**.
2. In the Email Notifications section, click the drop down menu and set your desired e-mail frequency interval.



3. Scroll to the bottom of the page and click **Save**.



To **enable or disable** your **e-mail notifications** on a folder:

1. Click on the folder in which you would like to enable or disable your e-mail notifications.
2. Below the file and folder list, **check the box(es)** according to your preference:
 - a. Receive an e-mail when a file is: **Downloaded from this folder**.
 - b. Receive an e-mail when a file is: **Uploaded to this folder**.

Email me when a file is: ☒ Downloaded from this folder ☒ Uploaded to this folder

3. Changes will be saved automatically when a box is checked and the page will refresh.

Managing Permissions

Folder Permission Descriptions

- **Download:** User has the ability to download and preview any document in the folder. Without this permission, the user will only be able to see which documents they uploaded.
- **Download Alerts:** User will be notified via e-mail that files have been downloaded from the folder.
- **Upload:** User has the ability to upload files and create subfolders in the folder.
- **Upload Alerts:** User will be notified via e-mail that files have been uploaded to the folder. This permission requires the user to also have the download permission. Users with download permission will also be able to grant themselves this permission through a checkbox on the folder visible on a folder's main Moss Adams Client Portal screen.
- **Delete:** User has the ability to delete files within the folder that they did not upload. This permission requires the user to also have the download permission.
- **Admin:** User has the ability to manage access on the File Transfer Folder and its subfolders, edit some folder options of other users (permissions and alerts) as well as create new users.



Any subfolders created will automatically inherit the parent folder's permissions. If the subfolder's permissions are unique, the Client Administrator must make user permission changes at the subfolder level. See [How to Change a User's Permissions on a File Transfer Folder](#).

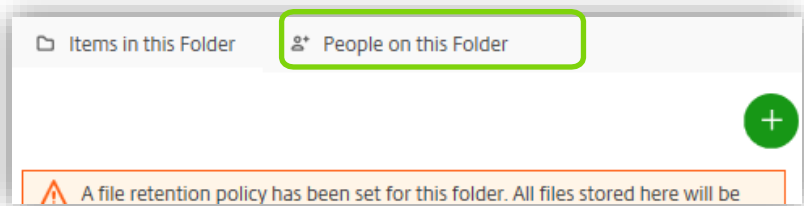
Difference Between Client User and Client Administrator Permissions

Permissions Summary:		File Transfer Folder					Final Deliverables Folder				
		View Users with Access	Download Files	Upload / Create Sub-Folders*	Delete (Files and Sub-Folders)**	Add/Remove Users	View Users with Access	Download Files	Upload / Create Sub-Folders*	Delete (Files and Sub-Folders)**	Add/Remove Users
Key:		✓	✓	✗	✗		✓	✓	✗	✗	✗
Client / External User Types:											
Client User		✓	✓	✓	✗	✗	✓	✓	✗	✗	✗
Client Administrator		✓	✓	✓	✓	✓	✓	✓	✗	✗	✗

How to Change a User's Permissions on a File Transfer Folder

**Only Client Administrators and Moss Adams personnel can add or remove users*

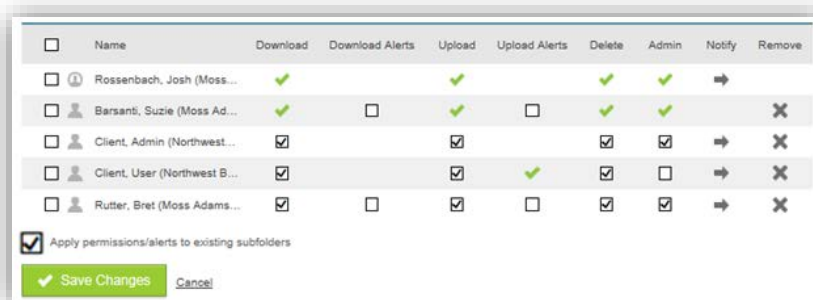
1. Click on the desired File Transfer folder or subfolder.
2. Towards the top of your Web browser is a tab titled **People on the Folder** that lists who currently has access to the selected folder and their permission level.



- a. Click the **check boxes** to edit access and permissions on the selected File Transfer Folder. (If you don't see the checkboxes you may not be setup as a Client Administrator on this folder. Please contact your organization's Client Administrator for the Moss Adams Client Portal, or a member of your Moss Adams client service team, for assistance.)

Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin
Super Users	✓		✓		✓	✓
Rossenbach, Josh (Moss Adams) (...)	✓		✓		✓	✓
Barsanti, Suzie (Moss Adams LLP)	✓	✓	✓	✓	✓	✓

3. In the **View/Edit Folder Access** dialogue window that appears use the check boxes to add or remove permissions as desired. See [Folder Permission Descriptions](#) for detail of each permission type.



4. Check **Apply permissions to subfolders** if you would like all of the users displayed on the **People on this Folder** tab to be granted with those same permissions in the existing subfolders.



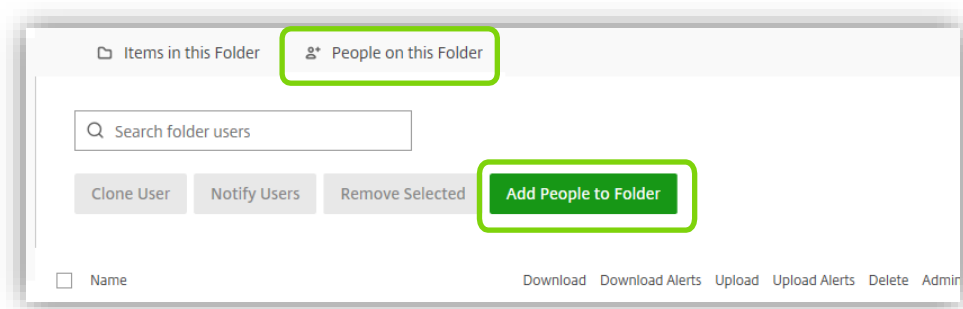


Checking the **Apply permissions to subfolders** box will override subfolder permission settings that may have been intentionally setup to restrict access. Therefore, Client Administrators should be aware of subfolder permission settings before checking the **Apply permissions to subfolders** box.

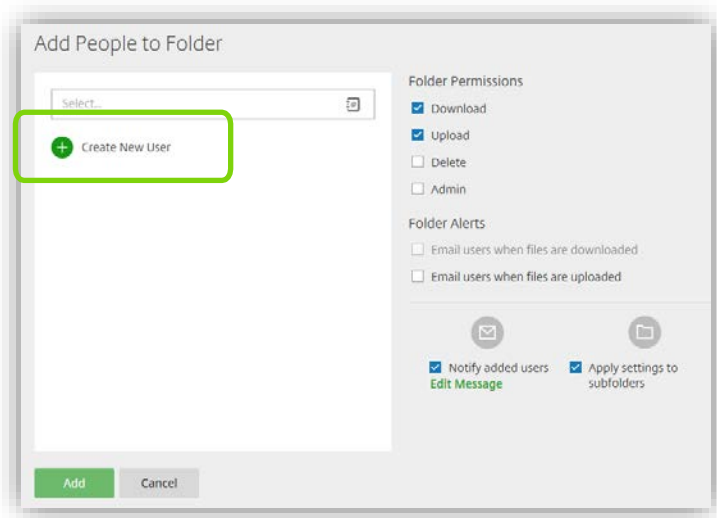
Add a New Client User to a File Transfer Folder

**Only Client Administrators and Moss Adams personnel can add or remove users*

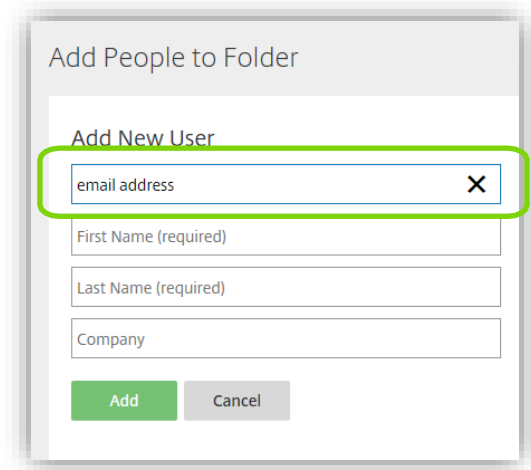
1. Click on the File Transfer Folder you would like to add a user to.
2. Towards the top of your Web browser is a tab titled **People on the Folder** that lists who currently has access to the selected folder and their permission level.
 - a. Click the **People on this Folder** tab then click **Add People to Folder**.



3. On the **Add People to Folder** dialogue window that appears, click **Create New User**.



4. Enter the full **Email Address** of the individual that you would like to add to the folder.



Add People to Folder

Add New User

email address X

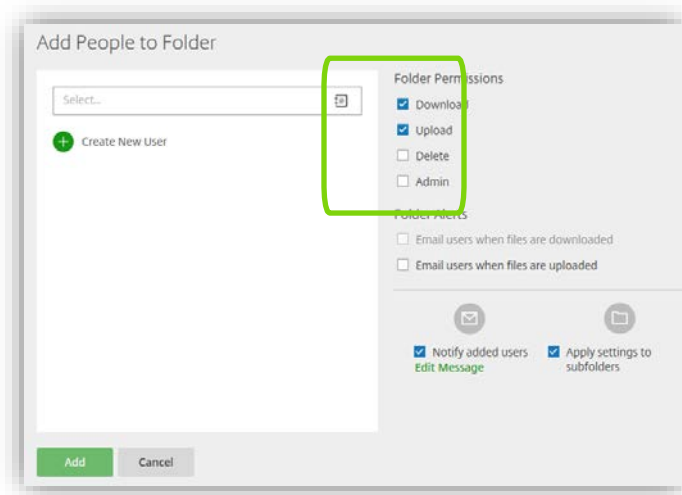
First Name (required)

Last Name (required)

Company

Add Cancel

5. Click the **Tab** key on your keyboard.
 - a. If the user is not already setup within the Moss Adams Client Portal, type in their **First Name**, **Last Name**, and **Company**.
 - b. If the user is already setup within the Moss Adams Client Portal, their name and company information will automatically populate. **Verify** this is the person you are intending to add to the current folder.
6. In the **Folder Permissions** section, use the check boxes to set the new users' permissions. See [Folder Permission Descriptions](#) for detail of each permission type.



Add People to Folder

Select...

+ Create New User

Folder Permissions

☒ Download

☒ Upload

☐ Delete

☐ Admin

Folder Alerts

☐ Email users when files are downloaded

☐ Email users when files are uploaded

☒ Notify added users
Edit Message

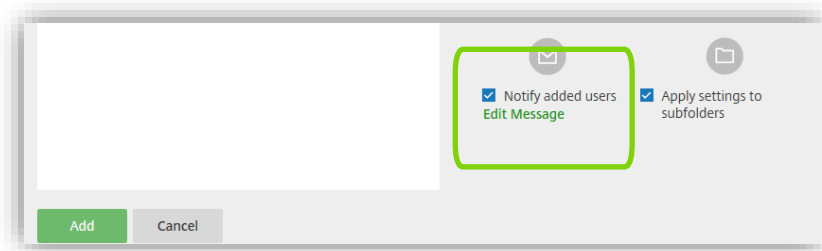
☒ Apply settings to subfolders

Add Cancel



The **Admin** box should remain unchecked for Client Users and be checked only for Client Administrators.

7. To send the user an e-mail notifying them of their access to the folder (for new users the e-mail will include their log in information), check the **Notify added users** box.



8. Click **Add**.
9. On the **People on this Folder** tab window, confirm the new user and their Folder Access has been properly updated.
 - a. If there are subfolders (of the current folder) that the user should **not** have access to, confirm the **Apply permissions to existing subfolders** box located is *unchecked*.



Any subfolders created will automatically inherit the parent folder's permissions. If the subfolder's permissions should be unique, the Client Administrator must make user permission changes at the subfolder level. See [How to Change a User's Permissions on a File Transfer Folder](#).

10. If you make any changes to the user access on the **People on this Folder** tab, click **Save**.

Add a New Client Administrator to a File Transfer Folder

**Only Client Administrators and Moss Adams personnel can add or remove users*

1. Follow steps 1 through 5 as listed under [Add a New Client User to a File Transfer Folder](#).
2. In the **Folder Permissions** section, check the box for **Admin**. *(This will provide the individual with [Admin](#) permissions as noted above.)*
3. Follow steps 7 through 10 as listed under [Add a New Client User to a File Transfer Folder](#).



The **Client Administrator** is the primary client user who manages portal access for others in your organization. The Client Administrator should maintain strong controls over access to the portal.