eTaxPortal

User Manual

Administrator

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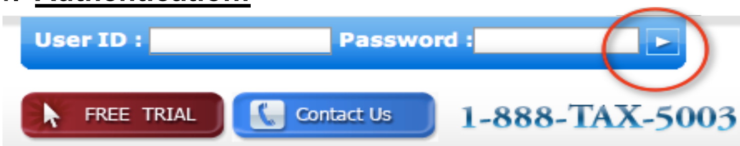
Introduction
eTaxPortal is a feature rich platform for multiple groups involved in the tax department. It addresses automation, collaboration, risk management, compliance, information sharing, scheduling, productivity and controls. The Workflow Management and Document Management components of the eTaxPortal enables tax teams to securely access share and control digital assets and information. It facilitates the incremental creation of corporate data and provides unified, real-time access to information held in disparate systems.

Targeted Audience: Administrator

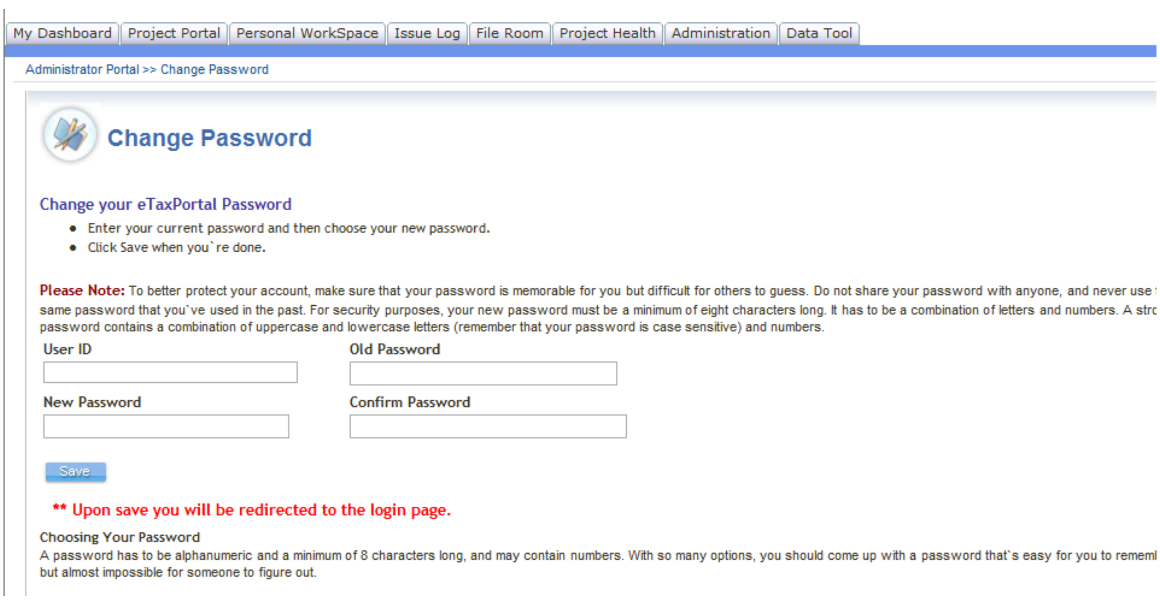
I.Getting Started

1. Authentication:



- Log on the **www.etaxportal.com**
- Type **User ID** & **Password**
- Click on **Login** Button

2. Change Password



- **First Time Access**
  The system will require the Users to change their auto-generated password once they have accessed the system for the first time.

- **Password Configuration**
  - Password should consist of alphanumeric characters.
  - Minimum of 8 characters long.

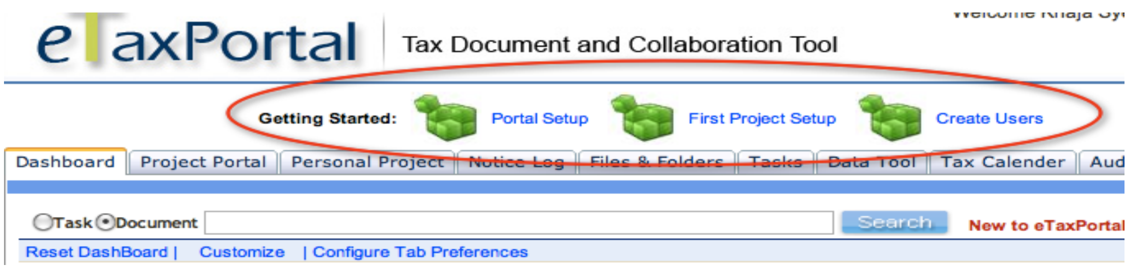
- Do not use spaces, symbols (? /+*&@\) or numbers.

A strong password contains a combination of ***uppercase*** and ***lowercase*** letters.

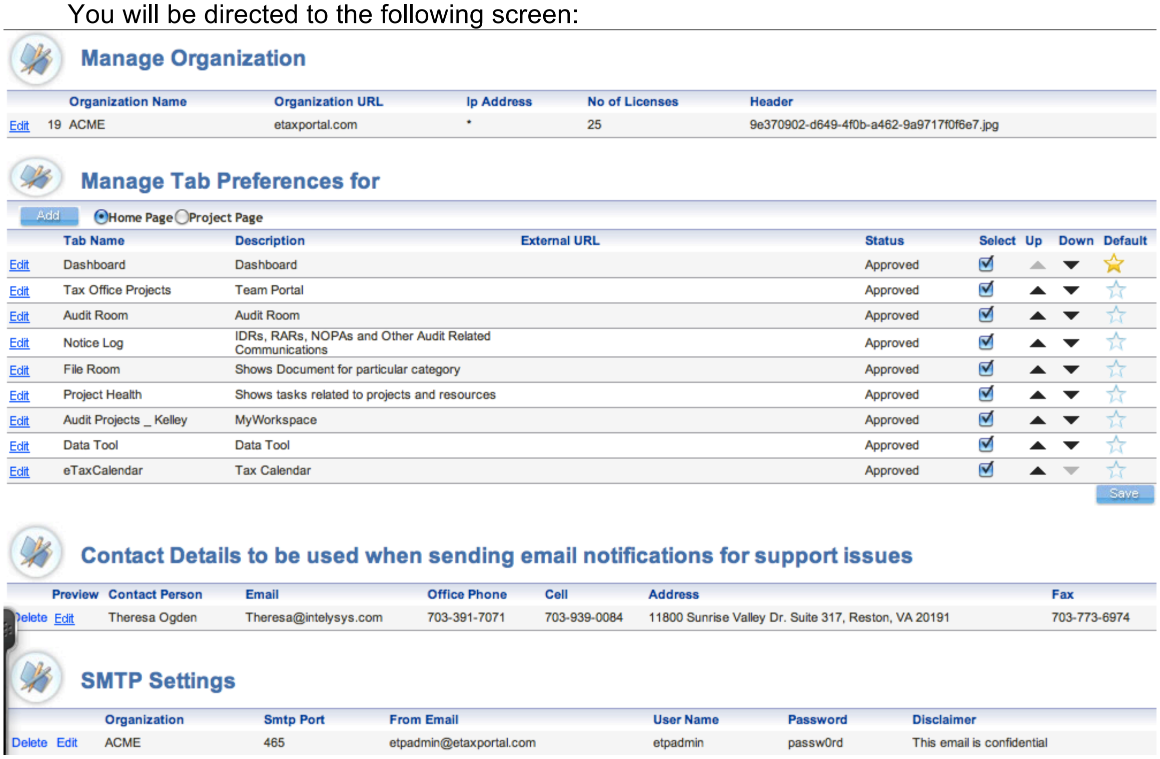
Remember… Your password is case sensitive

- After ***saving*** the password, the User will be redirected to the login page again, where the User will use the new password that was created.

3. Portal Setup: Click on the first link "Portal Setup"



You will be directed to the following screen:



Manage Organization

	Organization Name	Organization URL	Ip Address	No of Licenses	Header
Edit	19 ACME	etaxportal.com	*	25	9e370902-d649-4f0b-a462-9a9717f0f6e7.jpg

Manage Tab Preferences for

Add Home Page Project Page

	Tab Name	Description	External URL	Status	Select	Up	Down	Default
Edit	Dashboard	Dashboard		Approved				
Edit	Tax Office Projects	Team Portal		Approved				
Edit	Audit Room	Audit Room		Approved				
Edit	Notice Log	IDRs, RARs, NOPAs and Other Audit Related Communications		Approved				
Edit	File Room	Shows Document for particular category		Approved				
Edit	Project Health	Shows tasks related to projects and resources		Approved				
Edit	Audit Projects _ Kelley	MyWorkspace		Approved				
Edit	Data Tool	Data Tool		Approved				
Edit	eTaxCalendar	Tax Calendar		Approved				

Save

Contact Details to be used when sending email notifications for support issues

Preview	Contact Person	Email	Office Phone	Cell	Address	Fax
Delete Edit	Theresa Ogden	Theresa@intelysys.com	703-391-7071	703-939-0084	11800 Sunrise Valley Dr. Suite 317, Reston, VA 20191	703-773-6974

SMTP Settings

	Organization	Smtp Port	From Email	User Name	Password	Disclaimer
Delete Edit	ACME	465	etpadmin@etaxportal.com	etpadmin	passw0rd	This email is confidential

a. **<u>Manage Organization:</u>** You will find your organization information under Manage organization

Upload a your header for your Portal :

- Click on Choose File
- Upload your own personal header from your desktop and click Save

<u>b. Manage Tab Preferences:</u> It allows users to change tab names and move tabs position according to their own preference. For example, a user can change the name of “Project Portal” to “TaxProject” and make that tab last in the row of tabs.

To manage main tabs of eTaxPortal, click on the radio button “Home”

To manage the tabs inside a Project click on the radio button “Project”

To change the tabs position-Click on the Up or Down arrow and click on Save.

To change the name of a tab, click on Edit button.

To remove a tab for eTaxPortal uncheck the box in the Tab report

To view any different page other than dashboard as a default click on the star by the desired tab name and the select SAVE

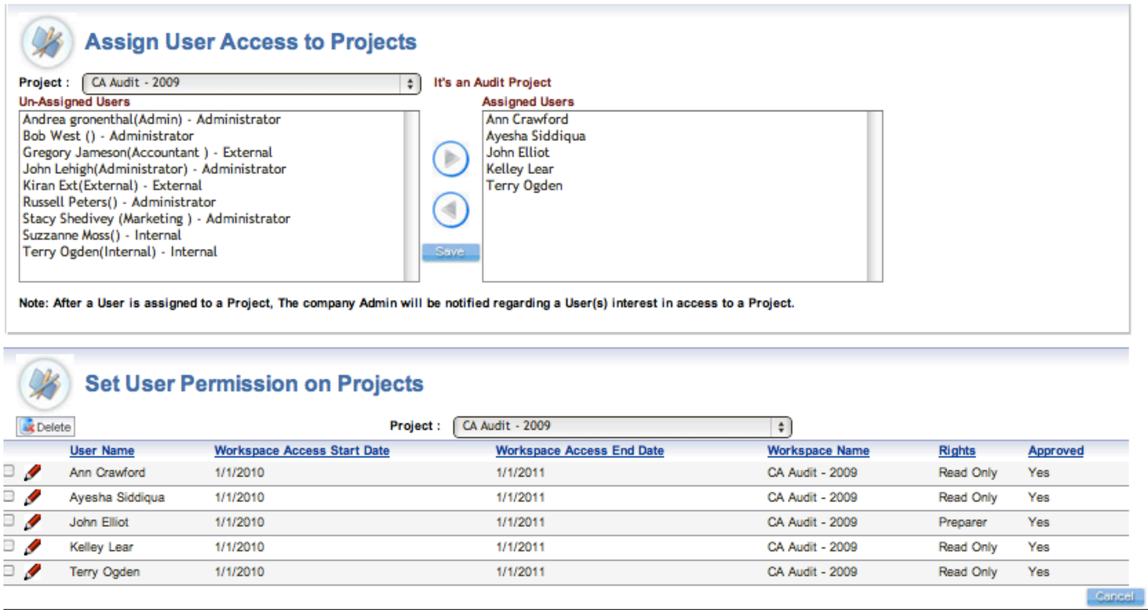
<u>c. Contact Detail:</u> Administrator can add his or her contact information here to be used when sending email notification for support issues.

<u>d. SMTP Settings</u> Click on Add to create SMTPP settings.

Click on home link at the far right corner of the screen.

4. First time Project Setup: Click on he First time project setup link on the Home Page

- On the add Project page click on Add
- Enter the project name and description, its start and end date. And click on Save.
- You will be directed to assign user and setup user permission.



Assign Users to the project

- Click on the **Assign** link in the Workspace report beside any Project Name to which you want to assign a user .
- Select the users from the list box **Un-assigned Users** and click the arrowhead pointing to the list box **Assigned Users.** The user is now seen in Assigned Users list box.
- Once the users are selected for a project, click **Save** button to finalize the settings

To Un-assign a user from a project

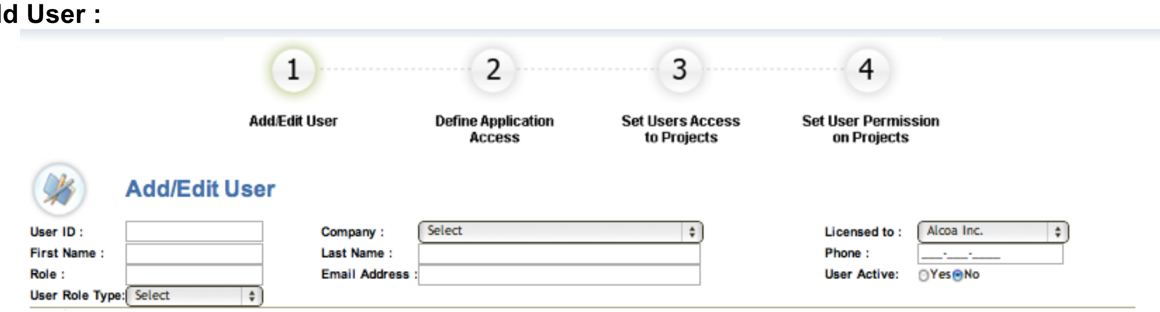
- Select Users from **Assigned Users** list box and clicking the arrowhead pointing to the **Un-assigned Users** list box.
- Click **Save** button to finalize the settings

5. Create Users:

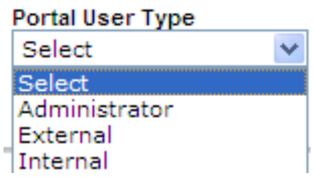
Click on Add User and you will be directed to a new screen where you can perform the following functions:

- Add User
- Define eTaxPortal access for a User
- Define Users access to a Project
- Set user permission on a Project

Add User :



- Enter User details.
- Select the User Type

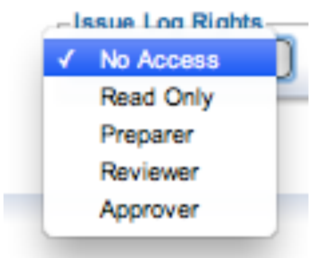


.
- Select if the user will be Active or Inactive. Inactive user cannot access the Portal.
- Click on **Add User** button.

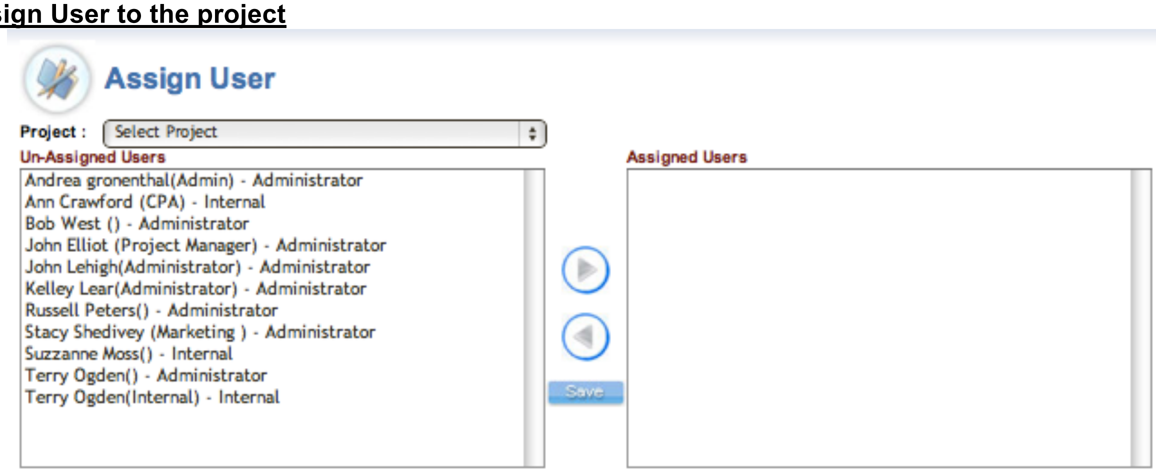
Reset User 

People frequently forget their passwords. One way to create a new password is to reset a user.
- Click on the check box by the User Id in the report
- The user's information will get populated in the user form.
- Click on **Reset Users** button. The user will receive an email with the user name and password.

Define User access to Issue Log : Select the Issue log right for the user and click on Add.



<u>Assign User to the project</u>



- Select the users from the list box **Un-assigned Users** and click the arrowhead pointing to the list box **Assigned Users.** The user is seen in Assigned Users list box.
- Click **Save** button to finalize the settings

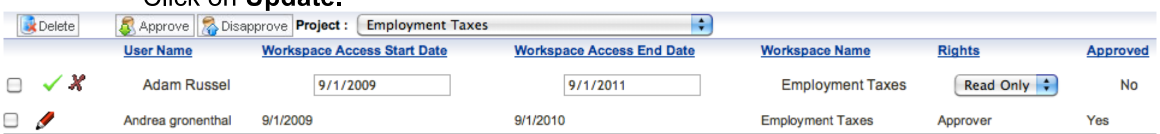
<u>Set User Permissions on a Project</u>

Approve User to access a particular project:
- Select the Project name from the drop down
- The users that were assigned to the that project will get populated in the report.
- Click on the check box by the user's name and then select **Approve button**

By default the user's access date for the workspace is same as the Project Start and End date. However administrator can define the workspace access dates for a user by clicking on the Edit button and changing the dates. Once the date reaches to an end the Project is no longer available for the user on the dashboards.

Define user's access rights to the Workspace:

- Click on the Edit Link beside the user's name.
- Select the right you want to provide to the user.
- Click on **Update.** 



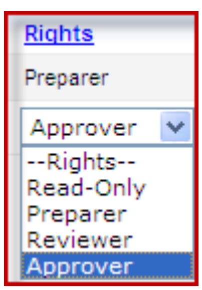
Explaining Users Right

Documents and tasks in eTaxPortal have different status and rights by which they can be viewed during the course of a project. However, individual users may possess different levels of rights relating to status within different workspaces. Due to these facts, we can assign the rights to user at the project level as opposed to at the user level.

Status and levels of rights are defined below:

Status:

1. Open
2. Assigned
3. Prepared
4. Reviewed
5. Signed off



The levels of Rights

1. Read Only
2. Preparer
3. Reviewer
4. Approver
5. Signed off

The User with "Read- Only" cannot make changes to any status.
The User with "Preparer" rights can assign state of **Open, Assigned, and Prepared.**
The User with "Reviewer" rights can assign state of **Open, Assigned, Prepared, and Reviewed.**
The User with "Approver" can assign state of **Open, Assigned, Prepared, and Reviewed**

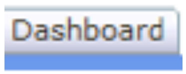
and Signed Off.

For example: User John Doe may be an Approver for the **Workspace A**, but a Preparer for the **Workspace B**. In that situation, he warrants different levels of rights depending on which project he is working.

To Assign rights for a Rights to the user:

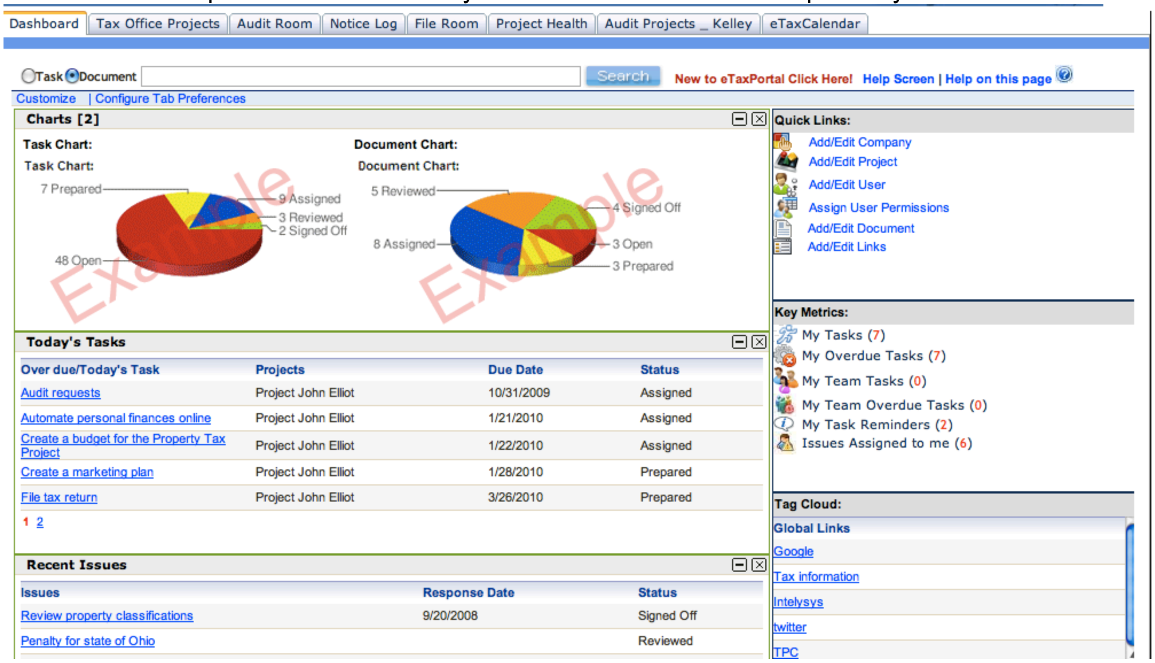
- Click on the Edit button by the user name
- Select the rights
- Click on the check mark

II. Exploring Options



1. Dashboard :

Dashboard is the personalized summary of an individual work and a pathway to other content.



Once the User has logged in, User will see the ***default*** view of **My Dashboard**.

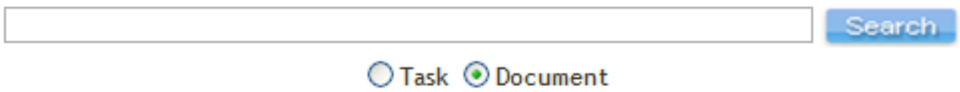
A. Sections in My Dashboard

Document and Task Charts: Display the status completion of the documents and tasks assigned to you.
Today's Tasks: Displays tasks that are due today.
Recent Tasks: Displays tasks that are due within 7 days.
Recent Documents: Displays documents that have been uploaded within past 7 days.
Recent Issues: Issues that have been uploaded within past 7 days.
Task Reminders: It reminds user for any upcoming tasks.
Quick Link: Help User to navigate easily within the portal for administrative tasks
Tag Cloud: Links that helps users to quickly access commonly used sites out site the portal.

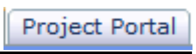
Task Key Matrix: Display the tasks due today and overdue tasks.
Clicking on any link will take user to particular task and document.

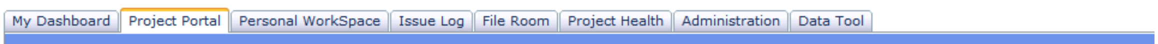
B. Search

- The users can also search a document or a task from the search bar across the project that they have access to.



2. Project Portal





Projects Assigned to Me	Start Date	Close Date	Task Statistics	
2009 March Sales and Use Tax	4/1/2009	6/30/2009	18 (17 - Open; 0 - Assigned; 1 - Prepared; 0 - Reviewed; 0 - Signed Off)	Chart
Canada Room	9/15/2008	9/1/2009	0 (0 - Open; 0 - Assigned; 0 - Prepared; 0 - Reviewed; 0 - Signed Off)	Chart
Credits and Incentives	8/27/2008	8/27/2009	6 (1 - Open; 5 - Assigned; 0 - Prepared; 0 - Reviewed; 0 - Signed Off)	Chart
Data Requests	7/29/2008	12/31/2009	138 (47 - Open; 10 - Assigned; 71 - Prepared; 3 - Reviewed; 7 - Signed Off)	Chart
Employment Taxes	8/27/2008	8/27/2009	19 (4 - Open; 15 - Assigned; 0 - Prepared; 0 - Reviewed; 0 - Signed Off)	Chart

1 2 3 4 5 6 7

Over due/Today's task	Assigned To	Projects	Due Date	Priority	Status
Deployment	Khaja Syed	Process and Technology Project	11/3/2008	Low	Prepared
FAS 109 Data (Vertical Slice)	Khaja Syed	Process and Technology Project	2/18/2009	Medium	Assigned
FIN 48 Data - Vertical Slice (Technical)	Khaja Syed	Process and Technology Project	2/18/2009	Medium	Assigned
Fixed Assets - Vertical	Khaja Syed	Process and Technology Project	1/5/2009	Medium	Assigned
Property by State-Vertical Slice	Khaja Syed	Process and Technology Project	3/4/2009	Medium	Assigned

Recently Uploaded Documents	Attachment	Projects	Date Posted	Status
my new ipod	ipod info.docx	Project Theresa Ogden	6/15/2009	Prepared

1

This is the team view of the portal. From here users can access all their Projects as well as view all team tasks and recently uploaded documents related to the projects that they have access to. It has three sections:

Project Assigned to me

- Clicking on the link in **Project Assigned to me** will take the user into a specific project.
- Every project will have its start date and close date along with quick statistics of the Tasks.

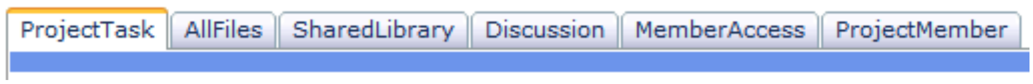
- **Chart:** Users can view graphical representation of the status of all the tasks and documents related to a particular project.

Over due/ Today's Task:
Display the entire team tasks that are due today or overdue. This is useful to facilitate other team members to assist in the completion of the task related to the project that they are part of.

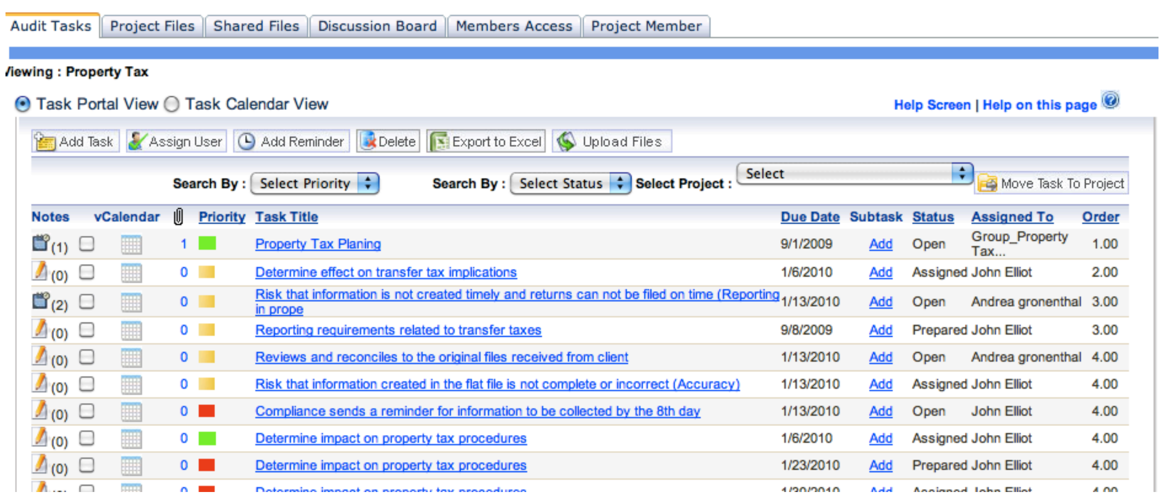
Recently Uploaded Documents:
It displays recently uploaded documents that have been uploaded with in last seven days pertaining to the project that team belongs to.

3. Projects

Once the user selects a **Project** by clicking on the link, a new set of tabs appear to direct the user through the project. Following are the tabs the user will see when clicking on any Project:

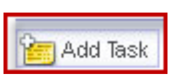


A. Project Tasks: Project Task is an area where you can easily access project related tasks and manage the entire milestones in one view. You will be able to view the task description, due date, priority, and status as well as whom it is assigned to.



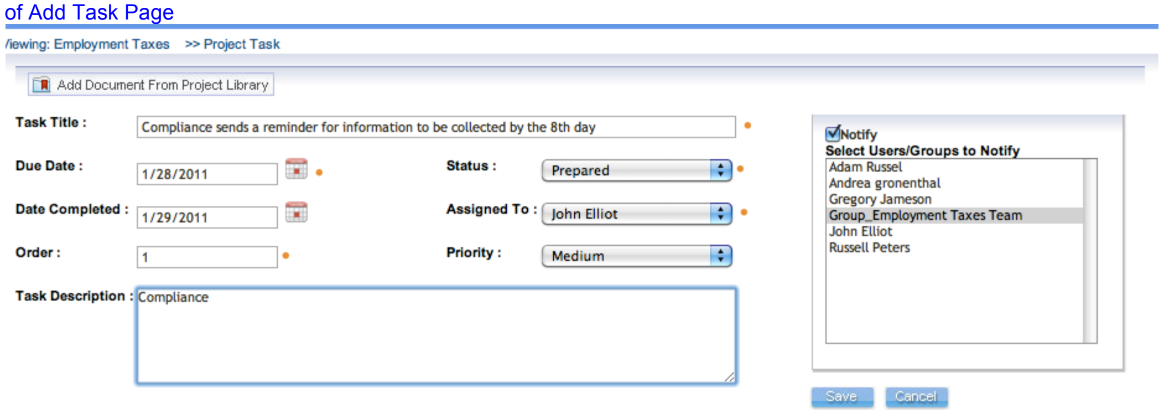
To Create Tasks.

Once you are inside a Project the first tab is a **Project Tasks** tab.

- Click on Add Task 

- Enter the Task information
- Click on Save

View of Add Task Page



Here you can assign task to a team member as well as Notify other team members or a group. Team members will receive an email upon notification.

Create Subtask: Click on Add Subtask button to create a subtask for a main task.

View Tasks priority by color. On the Task report different colors have been user to determine the priority of a task. Red – High priority; yellow – Medium priority; Green – Low Priority.

.

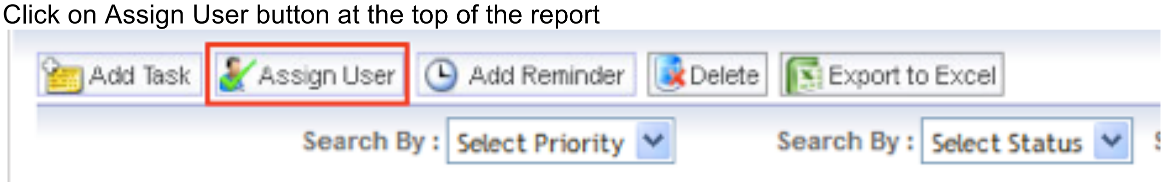
Open the Task in Edit: Click on the blue link for a task will allow acting on that task. It will open the task form in the Edit mode.

Click on a task to open in Edit mode

vCalendar	#Linked Docs	Task Title	Due Date	Priority	Status	Assigned To	Order
	0	Send Reminder to the Clients	5/7/2009	Low	Open	Ankeet Mehta	1.00
	4	Generate the sales and use tax reports and upload it on to the portal	4/8/2009	Low	Prepared	Laura Conrad	2.00

Assign users to tasks. You can also assign or reassign Task from Assign User button from the Task Page

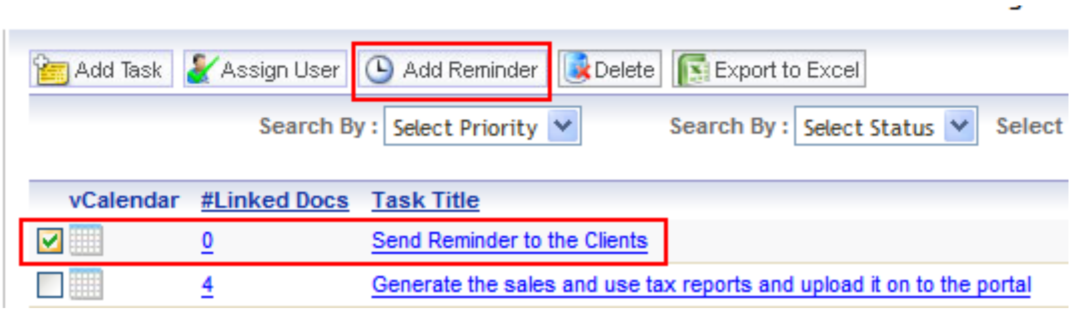
- Select the task by clicking on a checkbox by the task
- Click on Assign User button at the top of the report



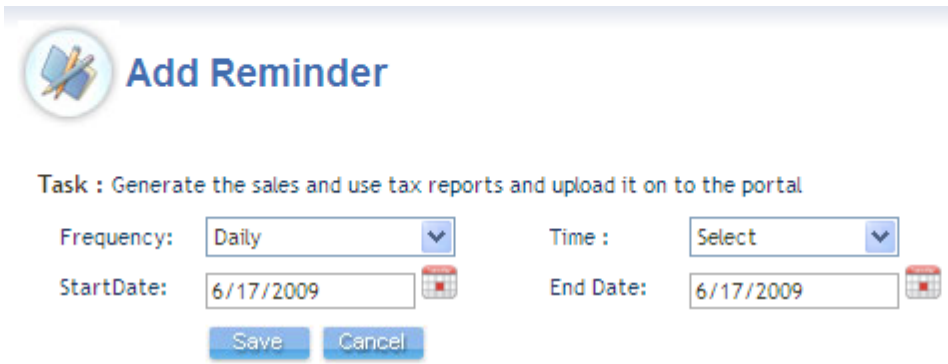
- The **Assign User** screen will open
- Assign user/group from the drop down **Assign To**
- Click **Save**

Creating Reminders for a Task: Users can create reminders for their tasks to display on **Dashboard.**

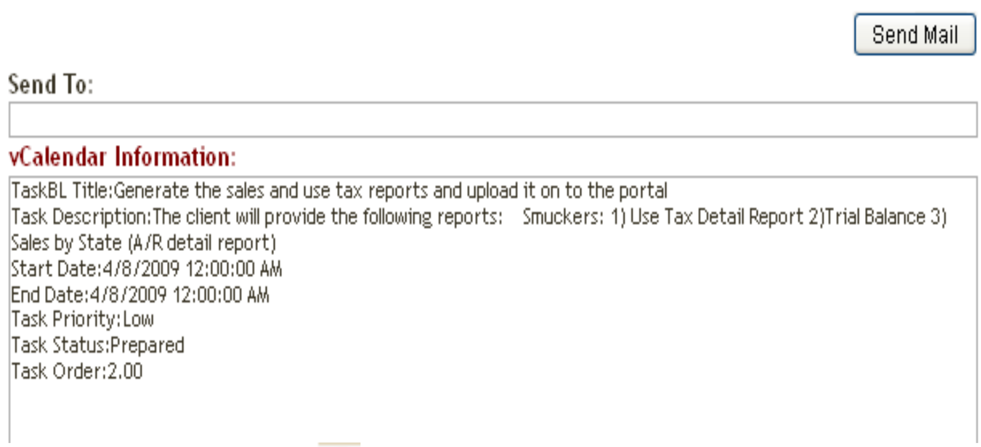
- Select the task by clicking on the check box.
- Click on **Add Reminder** tab



- Enter the information and Click **Save**



VCalendar.
VCalendar will help in seamlessly integrating the eTaxPortal Tasks with the Microsoft outlook Task. This will help the users to create reminder in their Outlook Express for those tasks. The user just has to enter an email address in v Calendar and the reminder is created in the user's outlook Express.

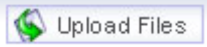


<u>Create Notes for a the Task</u> 

- Click on the Add Notes icon
- Add Notes and Click on Save. eTaxportal will automatically save user name and date with notes

<u>Attach a document/File to the Task</u>

. There are two tabs on the Task form that allows user to add document /File

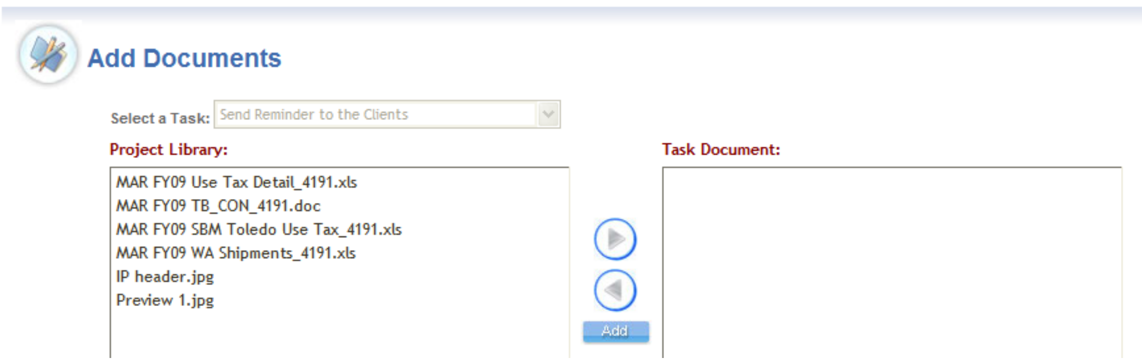
- Upload Files 

- Add Document from All Files 

Upload Files tab
This button allows users to upload a new document from your local drive with a task. *We will discuss about adding documents in the All Files*

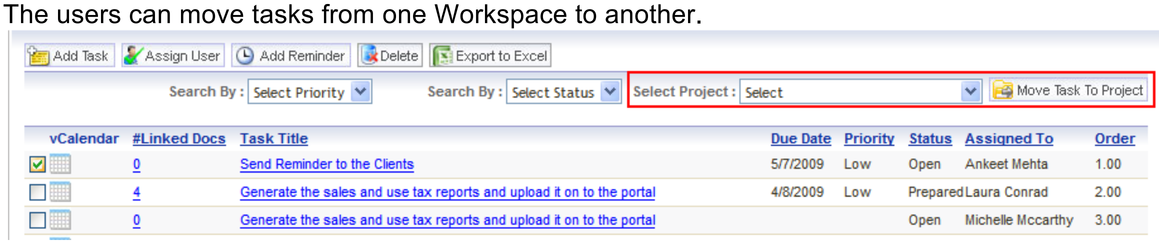
Add Document from Project Library tab

- Click on "Add Document from Project Library".
- Select a Task from the drop down.
- Select documents from **Project Library** box and click on the right arrow to move the documents in the **Task Document** box.
- Click on **Add.**



Associated documents with the task appear under attachment sign in the Task report

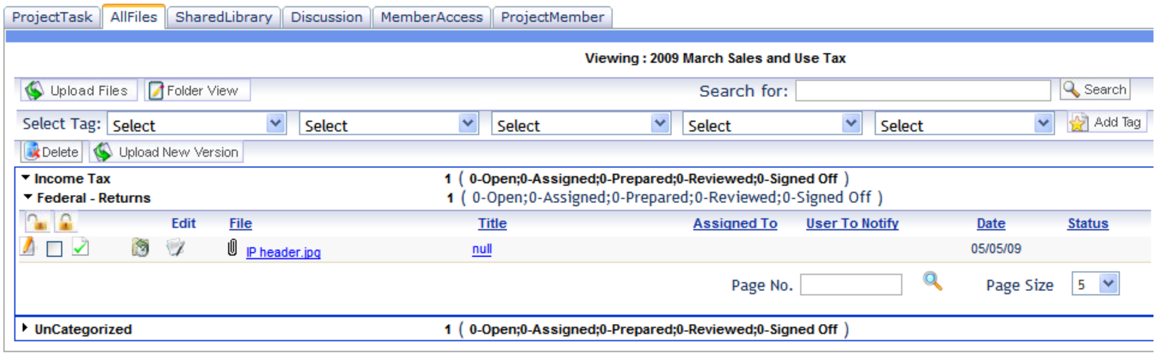
<u>Move task to another Project:</u>
The users can move tasks from one Workspace to another.

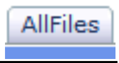


- Select the tasks to be moved by clicking on the check box. You can select multiple tasks as well.
- Select a Project from the drop down **Select Project**.
- Click on the **Move task to Project** button.

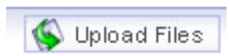
B. <u>All Files</u>:

The second tab in the Project is **All Files** tab. All Files is an area where you can organize and store files and documents. You can create custom **folders** and **subfolders** and can tag each document for easy searching. It also provides **CheckIn** /**CheckOut** and versioning functionalities.

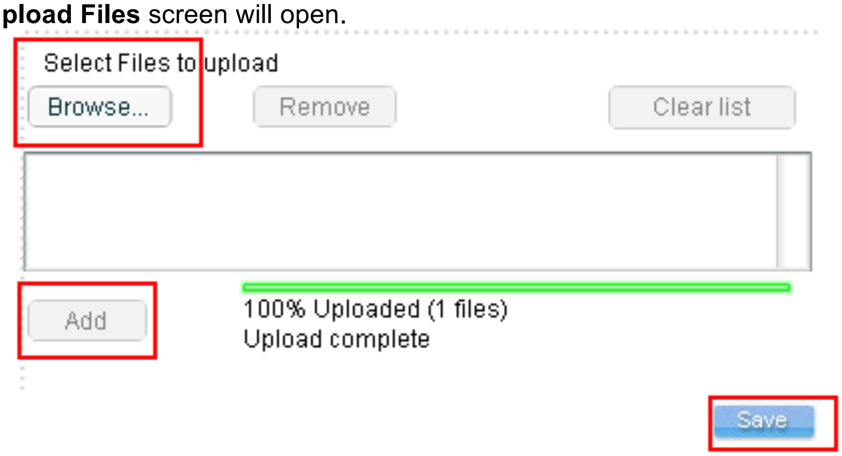


Upload Documents 

. To upload Files:

- Click on **Upload files** button 

- **Upload Files** screen will open.

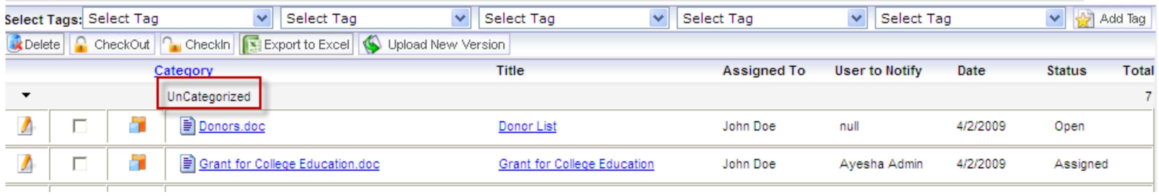


- Click on **Browse.**
- Select a files to be uploaded and click **Open**
- The file will populate in the upload box
- Click on **Add** (You can upload multiple files at the same time)
- Click on **Save**

Please note that you must click on the "Add" button to upload your document and then "Save" button to store your changes. If you select save without adding first, your document will not be attached.

While you are uploading a file you can perform multiple actions on the document which includes tagging, assign file to a team member ,assign a status and notify other team members about your recently uploaded file.

if the files are not tagged while uploading , they are available under **untagged documents** in the **Category view**



Action that can be performed after uploading of Files

<u>Versioning</u>
If you upload a document several times, you don't have to rename the document every time. Documents are never overwritten and all versions are saved. The latest version is always on the bottom.

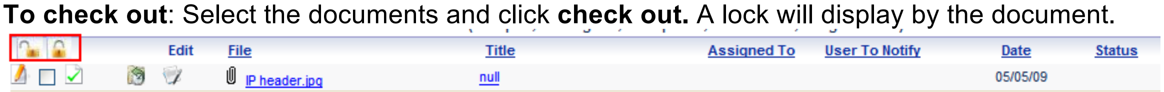
- **To upload a new version** 

    - Click on **Upload New Version** button from All Files tab.
    - Browse to upload a new file
    - Click on **Save**

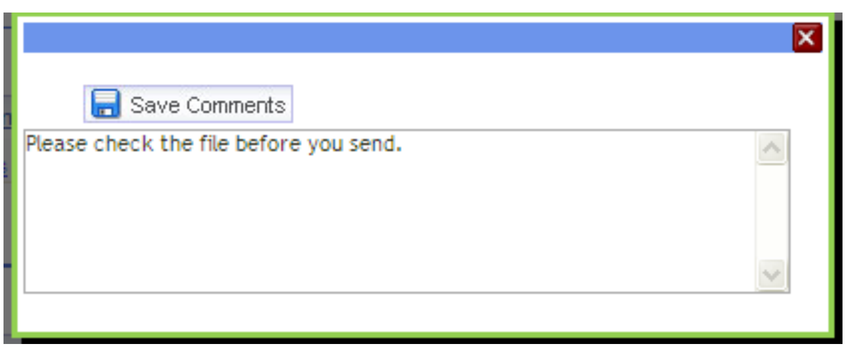
To view different versions click on the clock icon  **on the document report.**

<u>Checkin/CheckOut:</u>
This Functions allows to perform Check in and Checkout of documents so that only one person works on the document at any given point in time.

To check out: Select the documents and click **check out.** A lock will display by the document.

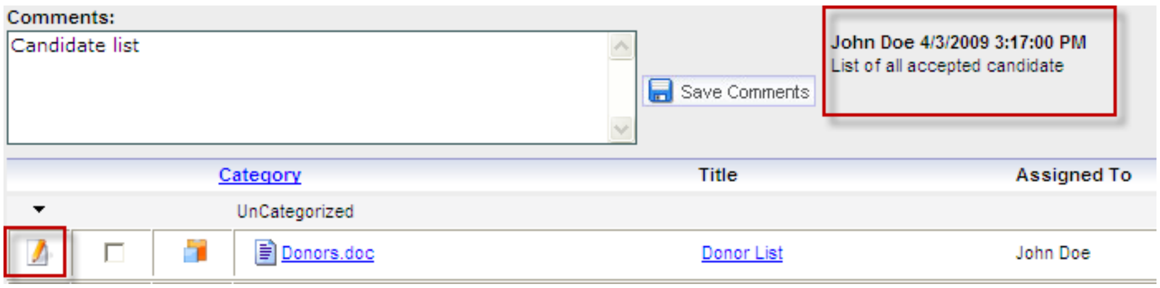


<u>Comments/Notes</u> 



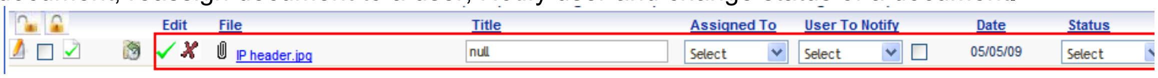
- Click on a Comment icon by the document
- Comment box will appear at the top of the report.
- Add comment and click **Save Comment**

Every time a new comment is added it appears with name of the person who added the last comment along with the date.



Edit

<u>Inline Edit :</u> Click on the pencil icon on the document to change the Title of a document, reassign document to a user; Notify user and change status of a document.



- Click on the inline Edit button from All Files tab.
- Enter the title, Select the User/group to assign and notify user and select the status from the drop down.
- Click on the check mark when done.

<u>Organizing Files</u>

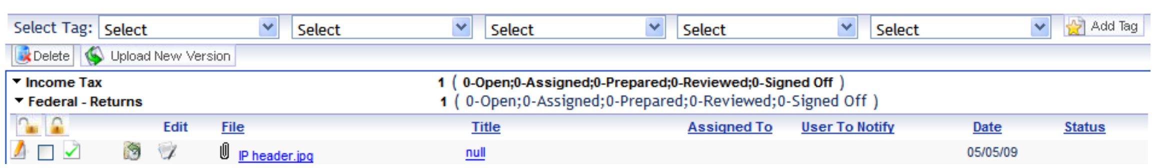
There are two ways you can organize files .

- Tagging each files
- Organizing files in Folders and Subfolder

Tagging: Once the files are uploaded they can be tagged. Tagging is used for easy searching of all files uploaded in File room.

To Tag a Document:

- Click on an arrow by **uncategorized documents**. All the documents uploaded will display in the report.
- Click on the check box by the document.
- Select all five tags and Click on **Add Tag** button.



Tagging can also be performed while uploading the document.

Folder and Subfolders

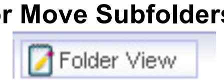
To create a Folder:

- Click on Folder view Folder View
- Then Click on Add Folder Add Folder
- Enter the information and click **Add**

To Create Sub Folder:

- Click on the Root
- Then Click on the folder in which you want to create Sub Folder

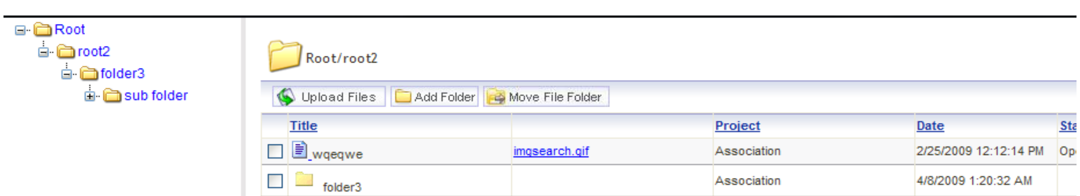
Organize Files in Folders or Move Subfolders into Folders:



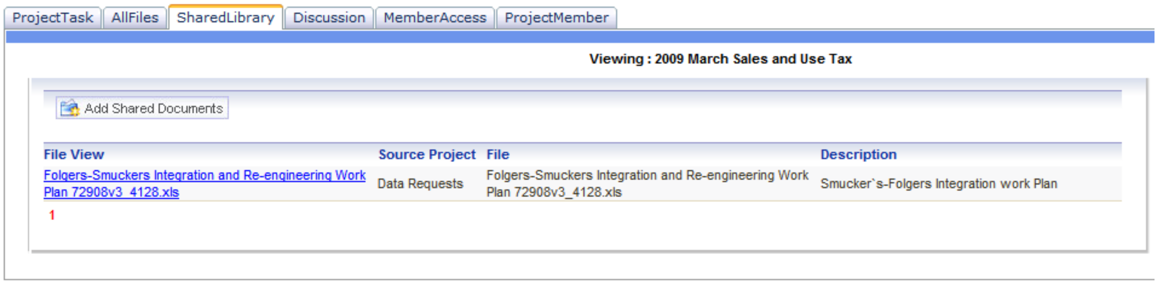
- Click on Folder View
- Select a File/or multiple files
- Select the folder from the dropdown **Folders**
- Click on **Move to Folder**
-
- User can easily **drag and drop** a file or folder in any specific folder

Organize Files in Sub Folders

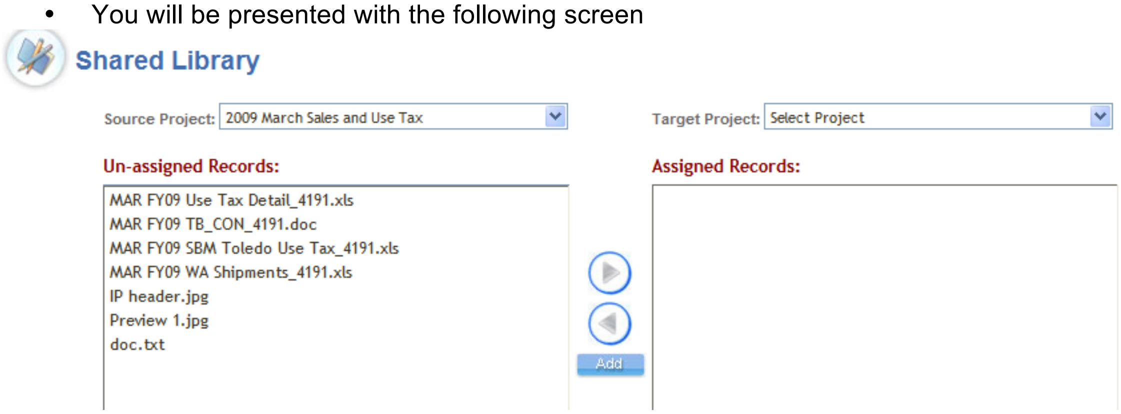
- Select a File/or multiple files
- Select the folder from the dropdown **Folders**
- Select subfolder from the drop down **Sub Folders**
- Click on **Move to Folder**



C. <u>Shared Library</u>: Shared Library allows users to share files with other workspaces.



- Click on **Add Shared Documents button** from the second level of tabs
- You will be presented with the following screen



- Select a project whose files you would like to share from the drop down **Source Project**
- Select a Project where you like to share files from the drop down **Target Project**
- The files in the selected source workspace will display in the list box
- Select the files and click on the right arrow
- Click **Save**

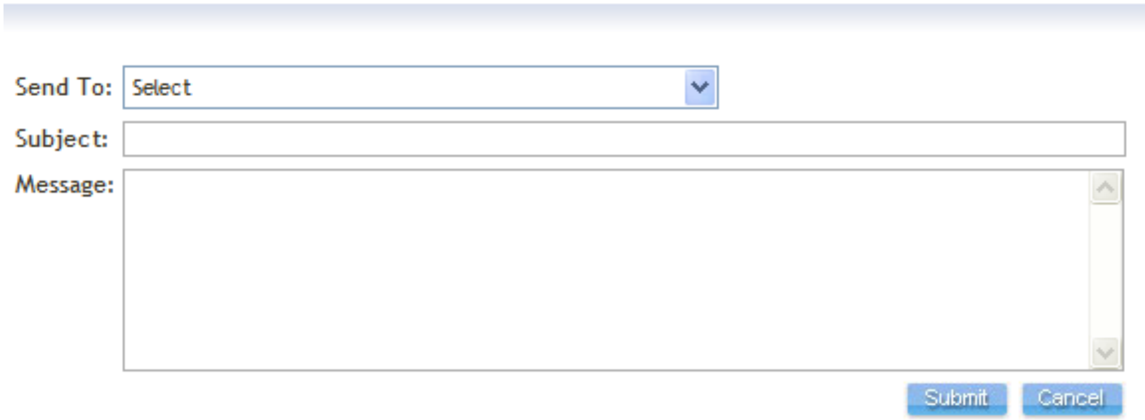
The files that have been shared will be available in the **Shared Library** section.

D. <u>Discussion</u>: This feature empowers users to communicate/send messages within the workspaces.

- When you send a message to another team member, the portal will generate an email message to the team member with the summary line and directing them to the portal to respond.
- The Messages tab shows a list of received messages and also who has sent them.

Send Message:

- Click on **Add Message** tab.
- Select a person from the drop down **Send To.**
- Create a message and click **Submit.**



- Click on **Inbox** to view all the messages received and **Outbox** to view all the sent messages.

E. <u>Member Access</u>: It provides a list of users who has access to the workspaces along with the description of the respective access rights.

ProjectTask | AllFiles | SharedLibrary | Discussion | MemberAccess | ProjectMember

Viewing : 2009 March Sales and Use Tax

User Name	Workspace Access Start Date	Workspace Access Expiry Date	Workspace Name	Rights	Approve
Ankeet Mehta	4/3/2009	4/3/2010	2009 March Sales and Use Tax	Preparer	No
Bozena Lenartowicz	4/3/2009	4/3/2010	2009 March Sales and Use Tax	Preparer	Yes
Catherine Warner	4/3/2009	4/3/2010	2009 March Sales and Use Tax	Preparer	Yes
Jennifer Lau	4/3/2009	4/3/2010	2009 March Sales and Use Tax	Preparer	Yes
Laura Conrad	4/3/2009	4/3/2010	2009 March Sales and Use Tax	Preparer	Yes
Michelle Mccarthy	4/3/2009	4/3/2010	2009 March Sales and Use Tax	Preparer	Yes

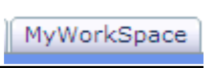
F. <u>Project Member</u>: It provides a list of those users who are related to the selected project.

ProjectTask | AllFiles | SharedLibrary | Discussion | MemberAccess | ProjectMember

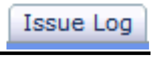
Viewing : 2009 March Sales and Use Tax

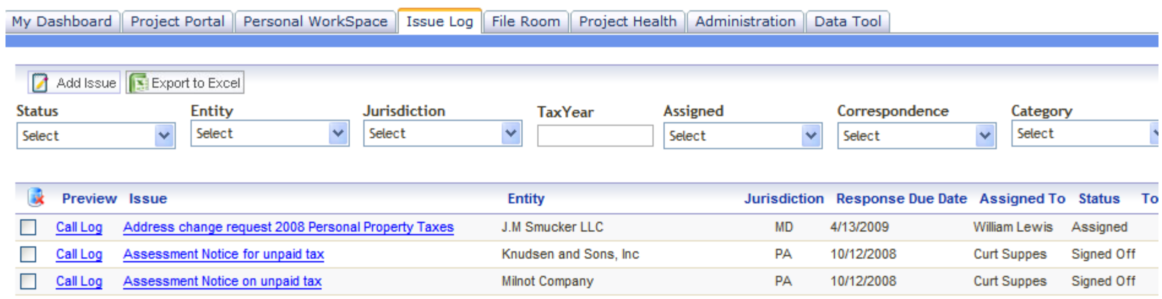
User Name	Portal User Type	Phone	Email Address
Ankeet Mehta	Internal	3129243403	showkatmir@gmail.com
Bozena Lenartowicz	Internal	3125883432	showkatmir@gmail.com
Catherine Warner	Internal	4158163008	showkatmir@gmail.com
Jennifer Lau	Internal	3125883410	showkatmir@gmail.com
Laura Conrad	Internal	3306843198	showkatmir@gmail.com
Michelle Mccarthy	Internal	5137829226	showkatmir@gmail.com

4. <u>My Workspace</u>



When a new user is created by an administrator of an organization, eTaxportal creates a personalized workspace for the user . Here the user can store all there personal documents, files and images. The following are the options when you click on My Workspace.

5. Issue Log 



Issue Log contains detail of the issues. There are seven drop down lists in issue log portal page **Status, Entity**, **Jurisdiction**, **TaxYear**, **Assigned**, **Correspondence** and **Category**. User can search any issue based on different search criteria. **Go** button is used to display only those issues which user select to search. User can check out the detail of issues by clicking any of the issue links in the table.

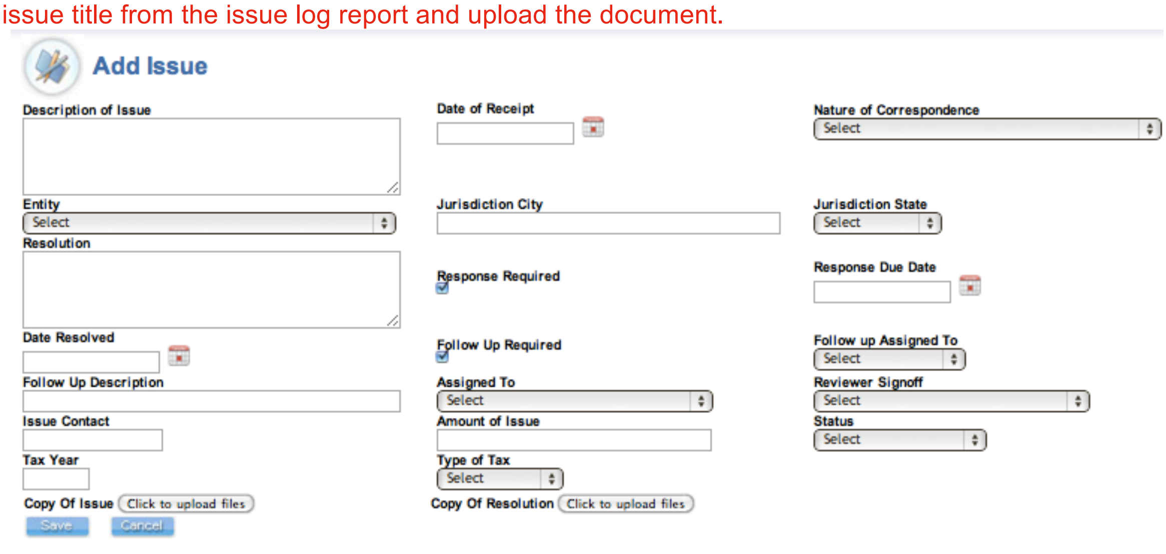
Call log : Provides logging capabilities for all telephone conversation.

1. Click on call log to add the related information.
2. You can also add information about multiple calls related to an issue. It will display in the call log report.

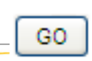
Create issues or correspondence in eTaxPortal.

1. Click on Add issues.
2. Fill in all the related information related to issues
3. Upload a copy of an issue
4. Click on save

Note: The copy of issue and resolution can be uploaded even after the issue is created. Click on the issue title from the issue log report and upload the document.



Search for issues:

- Users can search any issue based on different search criteria, which are **Status, Entity,** 

Jurisdiction, Tax Year, Assigned, Correspondence and **Category**.

- Click on Go button to display your search.

To view the details of issues: Click on an issue link in the issue report.

<u>6. File Room</u>:

File Room helps to index documents and records in a standardized manner for more effective discovery and reuse. It helps organization to dictate their own standard classification of documents/files that are uploaded in eTaxportal.

<u>Using File Room</u>

- In File Room you can view all the documents regardless of which workspace they belong to.
- You can view reports by different meta data that the organization has defined
- You can also upload a file from the File Room

You can do the following in the File Room

- View all the documents/files regardless of any project they belong to.
- View reports by different Tags/Meta data that the organization has defined.
- Upload files in any project from the File Room and tag them
- Perform an Advanced Search for a Document
- Search for any documents

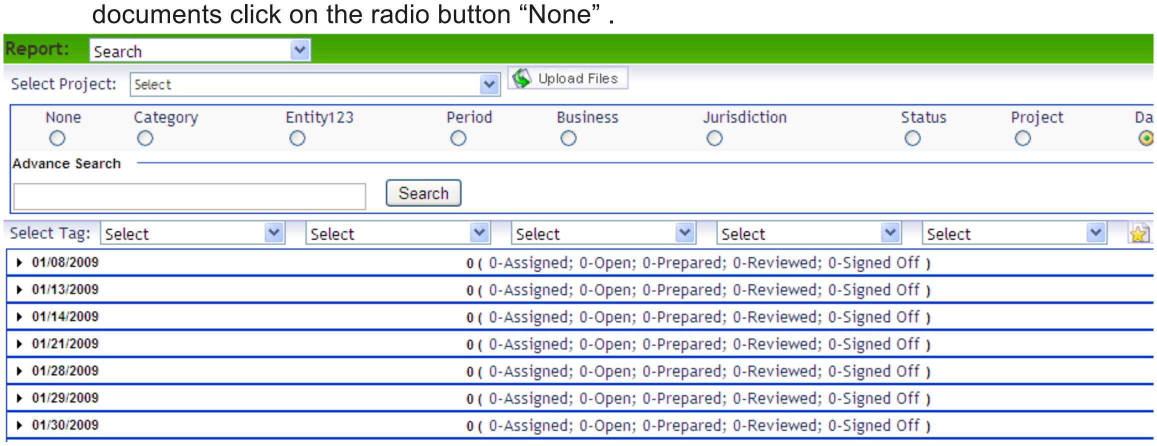
Note: It is important to define tags or Metadata for your organization and apply tags to all the documents before viewing the reports in the FileRoom. To define Meta data or tags, review help in “Organization Tags” in Administration.

- **Reports in File Room:** The reports in FileRoom are in two organized Formats- Hierarchical view and Search view)

  <u>**Search View:**</u>

  Users can view documents by nine different filters. The first five filters are by tags. The rest of the filters are by status, by Project and by Dates.

  Click on the Radio buttons to view the desired report. If you wish to view all the documents click on the radio button “None” .

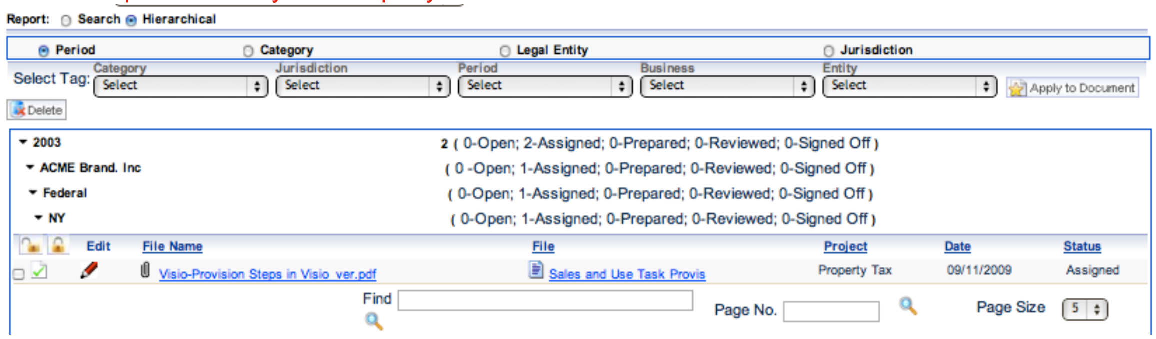


Advanced Search

Advanced Search will allow users to search documents by applying more than 1 filter.

Hierarchical View

Hierarchical reports allow users to view documents in a hierarchical view. There are five radio that button represents tags. Click on each radio button to view the reports by any tag in a hierarchical format. Note: These reports can be personalized according to requirement of your company.



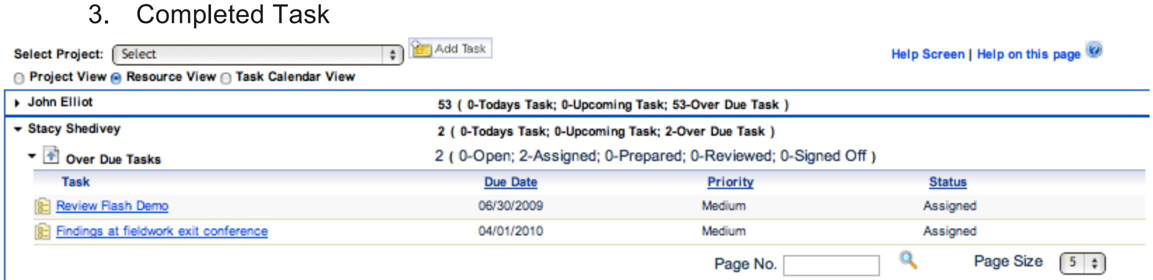
7. Project Health:

Project health is a part of eTaxWorkflow that lets you view at a glance all the tasks and its status categorize by resources and projects. This area is designed for you to easily manage Project. It keeps control of the all tasks and resource workload regardless of the projects they belong to.

A.Project View- Click on **Project View** Tab to view the Task status according to the Project.
B. Resource View – Click on the **Resource View** tab to view the Task status by Resources
C. Task Calendar View – Click on the **Task Calendar View** tab to view the overdue tasks status

The project and resource view group tasks in three categories

1. Currently due or Today's tasks
2. Late or Overdue tasks
3. Completed Task



To view the details information about tasks:

Expand the drop down by clicking on an arrow on the left side of the project/resource name.

Three different categories will appear (Today's task, Over due tasks and completed task). Expand further to view the task detail.

Note: It is important to assign a due date with the task because the task statistics are determined with the due date of the tasks. If the user is not assigned to a particular project they will no be able to view the related project in Project health.

8. AuditRoom

AuditRoom helps to separate the projects that users are using for internal collaboration versus dealing with external Auditors for an Audit.
Once an Audit project is created, it will display under AuditRoom tab. All the functions that are available inside any other project will also be available in AuditRoom.

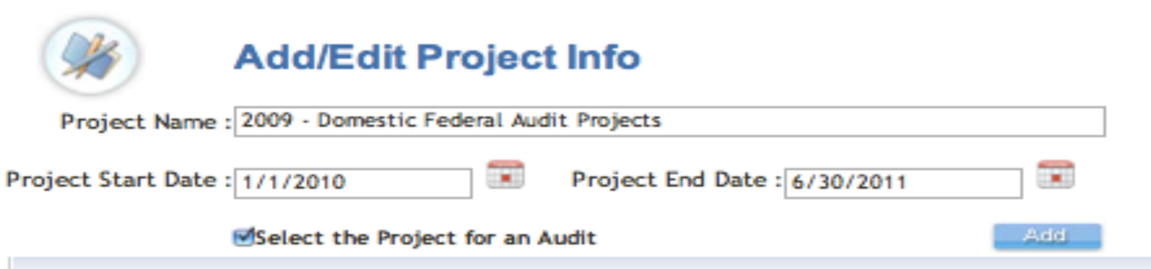
Access to an AuditRoom

eTaxPortal limits Auditor's access to an Audit Projects only. They rest of the application is not visible to the Auditors. When an external user logs in to eTaxPortal, he/she would only be able to view the project that has been selected for an Audit by an administrator. In order to limit auditor's access to Audit project, assign "External" rights to the auditor

Note: Review help on the Add/Edit user for assigning external rights to auditors

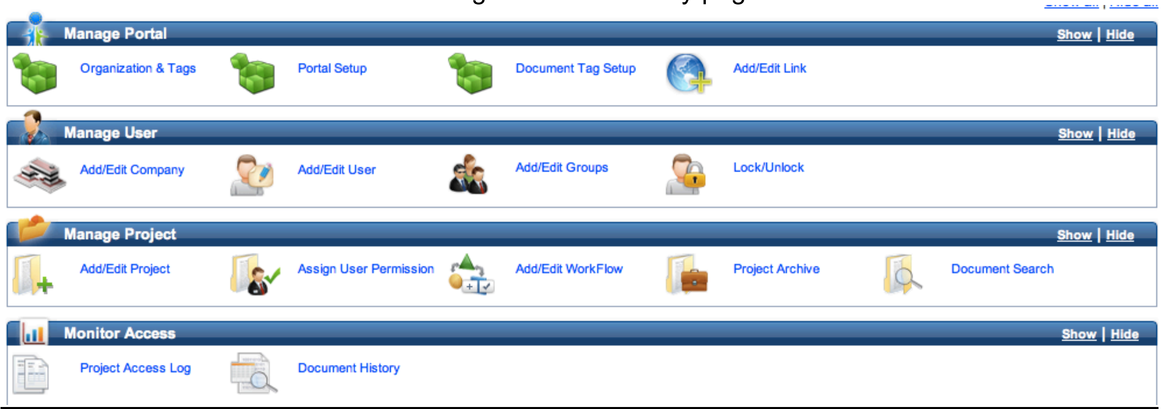
Steps to create an Audit project

1. From the Admin Portal, Click on "Add/Edit Project"
2. Create a project and click on the check box by "select a project for an audit". The project is now marked for an Audit.
3. Once an Audit project is created, click on "Assign" from the Project report
4. Assign users to an Audit Project



II. Administrative Functions

Click on "Administration" link at the far right corner of every page to visit to the Admin Portal



1.Document Tag Setup or Defining Meta Data :

eTaxportal gives organizations ability to define how they would like to tag the documents that are getting stored in eTaxportal for easy searching. It provides options to create five tags for a document. Bt default users will be provides with five tags. However you change the name of the tags according to your organization needs.

Renaming the Tags:

- Click on Edit
- Delete the tag names that are already there and type new names in all the fields
  Click on Save

Once the metadata fields are named you are ready to enter the Meta data.

Create Meta Data for the Tags

- **Meta Data Field 1**
  - Select **Meta data field 1**
  - Enter the information
  - Click on **Save**

- **Meta Data Field 5** - Hierarchal tagging

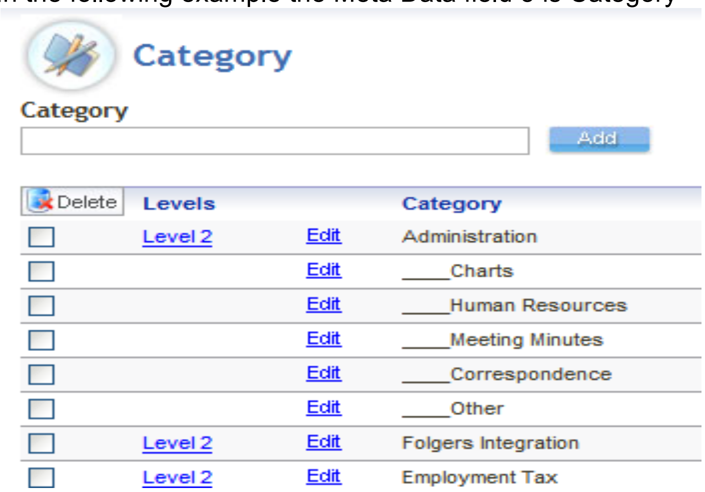
It allows to create hierarchical tags. For example:

-Scholarship Department
  -Application
  -Correspondence
  -Grants

To Create Hierarchical tags:

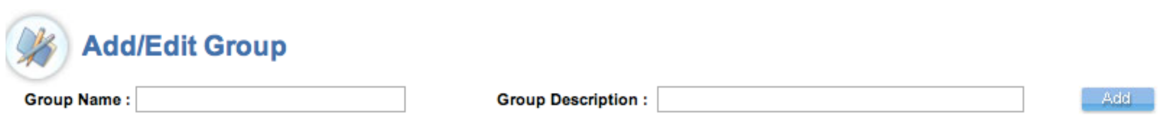
- Create the first level of tag, enter the information and click on **Save**
- Once the first tag is added it displays in the report.
- Click on **Level 2** button to create a sub tag, enter the information and then click **Add button.**
- You can create four sub tags for one tag.
-

In the following example the Meta Data field 5 is Category

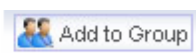


2.Create Groups

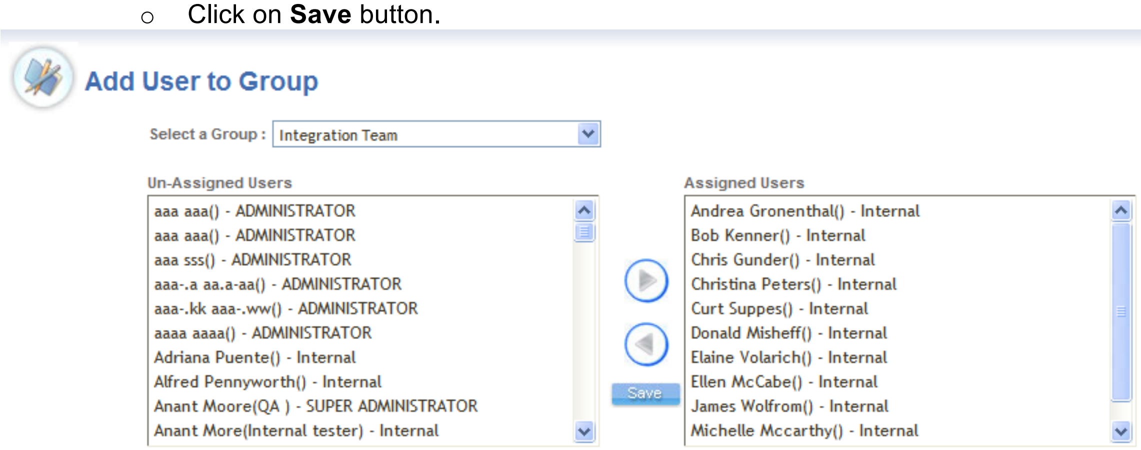
- Select **Add/ Edit Groups** from the Administration
- Enter the required information click on **Add**



Assign users to the Group

- Click on **Add to Group.** 

- Select a group to which you want to assign the users to, from the dropdown box labeled **Select a Group**.
- Select the users from the list box labeled **Un-assigned Users** and click the arrowhead pointing to the list box labeled **Assigned Users**.
- Click on **Save** button.



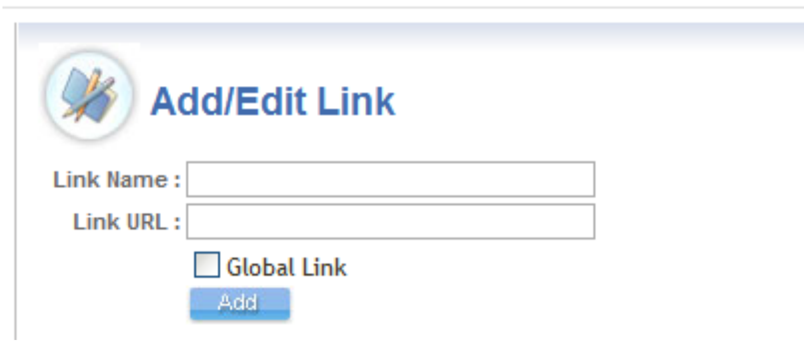
Add group to a project

- **Select group from the project dropdown**
- Select the users from the list box labeled **Un-assigned Users** and click the arrowhead pointing to the list box labeled **Assigned Users**.
- **Click on Save**

3.Create Links:

External Links can be created on Dashboard that allows access to other application from the dashboard.

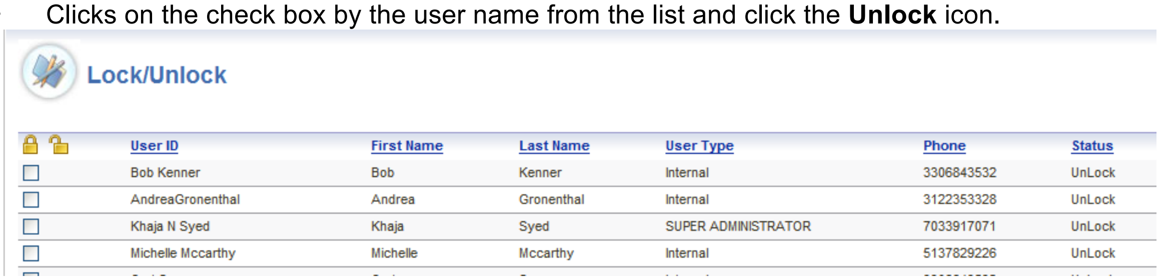
- From the Administration click on **Add/Edit Link**
- Enter Name and URL and Click on **Save**
- **Global Links:** To make the Link available for all the users click on the **Global Link.**



4.Lock/UnLock:

When a User enters its user id and password incorrectly three times eTaxPortal locks that user.

- **To unlock a user:** On Administration screen click Lock /unlock icon under Manage User.
- Clicks on the check box by the user name from the list and click the **Unlock** icon.



Lock/Unlock

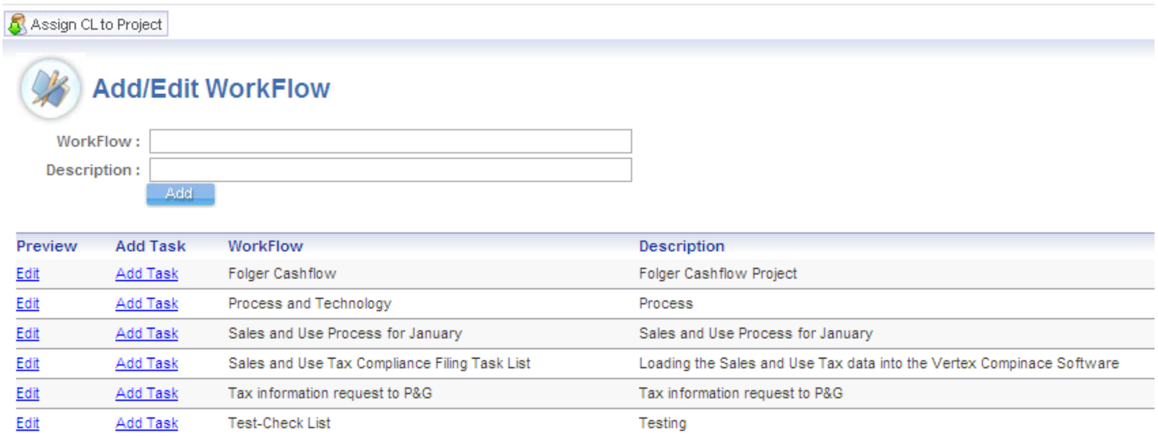
	User ID	First Name	Last Name	User Type	Phone	Status
	Bob Kenner	Bob	Kenner	Internal	3306843532	UnLock
	AndreaGronenthal	Andrea	Gronenthal	Internal	3122353328	UnLock
	Khaja N Syed	Khaja	Syed	SUPER ADMINISTRATOR	7033917071	UnLock
	Michelle Mccarthy	Michelle	Mccarthy	Internal	5137829226	UnLock

5. Workflow :

In addition to manually creating tasks in the task portion of the workspace, you can load a predefined list of tasks that are common across multiple Project s.

Create Workflow:

- From the **Administration** select **Add/Edit Workflow.**
- Enter Workflow name and Description.
- Click on **Add.**



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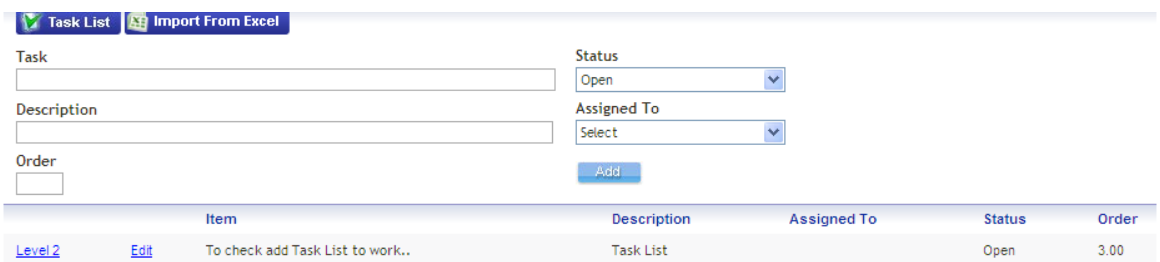
Add Tasks to the Workflow:

The user can add individual tasks to a Workflow that is created.

- Click on an **Add Task** Link by the Workflow you added.
- Enter the required information for each task.
- Click on **Add** button**.**



Create Hierarchical Tasks

- Click on Level 2 from the Task Report
- Enter the required information
- Click on **Add**
- Now a sub task is added to a parent task.
- Follow the same procedure for Level 3.

Import Tasks from Excel

The user can import Tasks from CSV format or XLS format to the application.

- Click on Import from Excel button.
- Click on Browse button.
- Select the file to import.
- Click on Import button.

Format to Import from Excel:

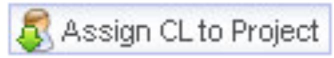
1. The Excel file to be imported should have the first 4 columns as Item, Description, Status and Order.
2. The first row should have the Column Names.
3. The data to be imported along with the header row should be highlighted and given a namespace of "Workflow".

Format to Import from CSV:

1. The CSV file to be imported should have the first 4 columns as Item, Description, Status

and Order.
2. The first row should have the Column Names.

To Assign Workflow to a Project

- Click on the **Assign CL to Project** button 

- Select project you want to assign the Workflow to, from the dropdown box labeled "Select a Workspace"
- Select the Workflow from the list box **Un-assigned Workflows** and click the arrowhead pointing to the list box **Assigned Workflows.** The Workflow can be seen in Assigned Tasks Lists list box.
- Click **Save** button to finalize the settings

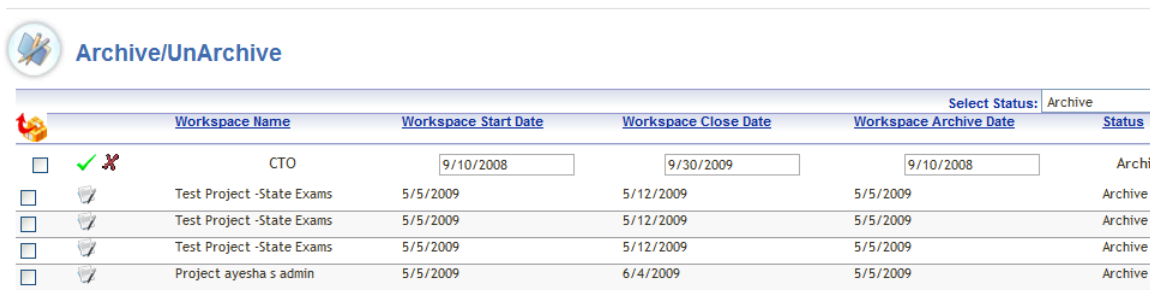
6. Archive/UnArchive:

Once the Project reaches its end date, it gets archived and no longer visible on the Project Portal. However the Project and its content are still available on the Portal in Archive/UnArchive section.

To make the workspace available, the workspace has to be UnArchived or the Close date of the Workspace has to be extended.

UnArchive a workspace:
- Select a Workspace.
- Click on a UnArchive.

To Extend the Workspace Close Date
- Click on inline Edit button for the Workspace.
- Change the Date and click on check mark.

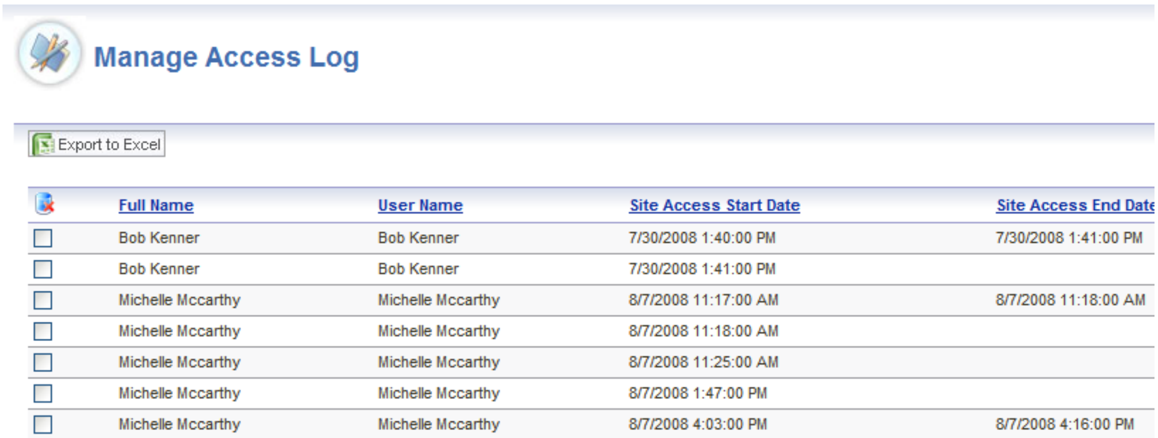


7. Document Search

- Click on Document Search from Administration Panel.
- Enter the document name in the search bar.
- Click on **Go** button.
- All the search results will be displayed.

8. Manage Access Log

- This function is used by an Administrator to view the log for all the users who have accessed this application.

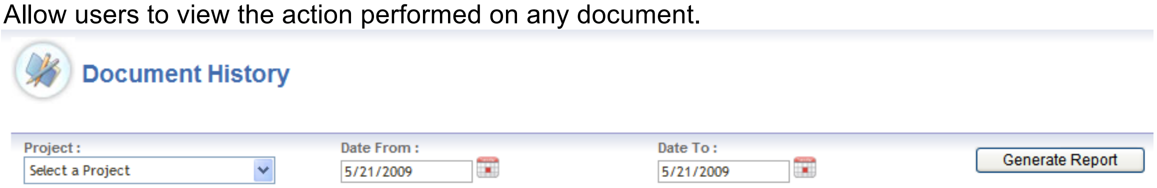

Manage Access Log

Export to Excel

	Full Name	User Name	Site Access Start Date	Site Access End Date
☐	Bob Kenner	Bob Kenner	7/30/2008 1:40:00 PM	7/30/2008 1:41:00 PM
☐	Bob Kenner	Bob Kenner	7/30/2008 1:41:00 PM	
☐	Michelle Mccarthy	Michelle Mccarthy	8/7/2008 11:17:00 AM	8/7/2008 11:18:00 AM
☐	Michelle Mccarthy	Michelle Mccarthy	8/7/2008 11:18:00 AM	
☐	Michelle Mccarthy	Michelle Mccarthy	8/7/2008 11:25:00 AM	
☐	Michelle Mccarthy	Michelle Mccarthy	8/7/2008 1:47:00 PM	
☐	Michelle Mccarthy	Michelle Mccarthy	8/7/2008 4:03:00 PM	8/7/2008 4:16:00 PM

9. Document History:

Allow users to view the action performed on any document.



- Select Project Name.
- Select a specific Date
- Click on **Generate Report.**
- All the search results will be displayed.