



Portal

User Guide

The iChannel Portal offers a secure location for you to access your files, collaborate with others, upload your documents and give access to those documents to other service providers. When you log into the Portal, you have complete control of the files and the security of those files that are published from iChannel.

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Portal User Guide

Welcome to the iChannel Portal for Gregory, Sharer & Stuart (GSS). The Portal is a feature of a larger Document Management System, called iChannel, which has been implemented by GSS. This portal offers a secure location for you to access your data, collaborate with GSS staff, upload documents of your own, and allow you to give access to your data to other service providers as you deem necessary. Via the internet, you now have access to your data 24 hours a day, 7 days a week. No more waiting for copies and revisions to be mailed back and forth.

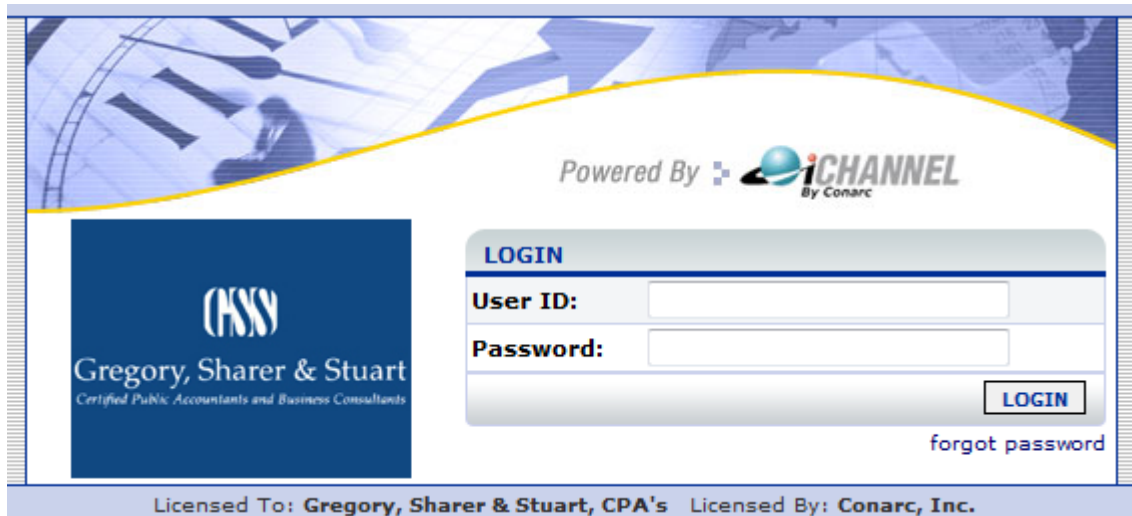
This guide will walk you through logging into your personalized, secure portal site. It will also show you how to access your documents, how to upload your own documents and how to reset your password.

Logging into the Portal

You will be provided the following information to login to your Portal. Record that information here:

Website: https://netchannel.gsscpa.com/
User Id: _____
Password: _____
Site Name or #: _____

1. Go to the provided website. You will see a login screen.

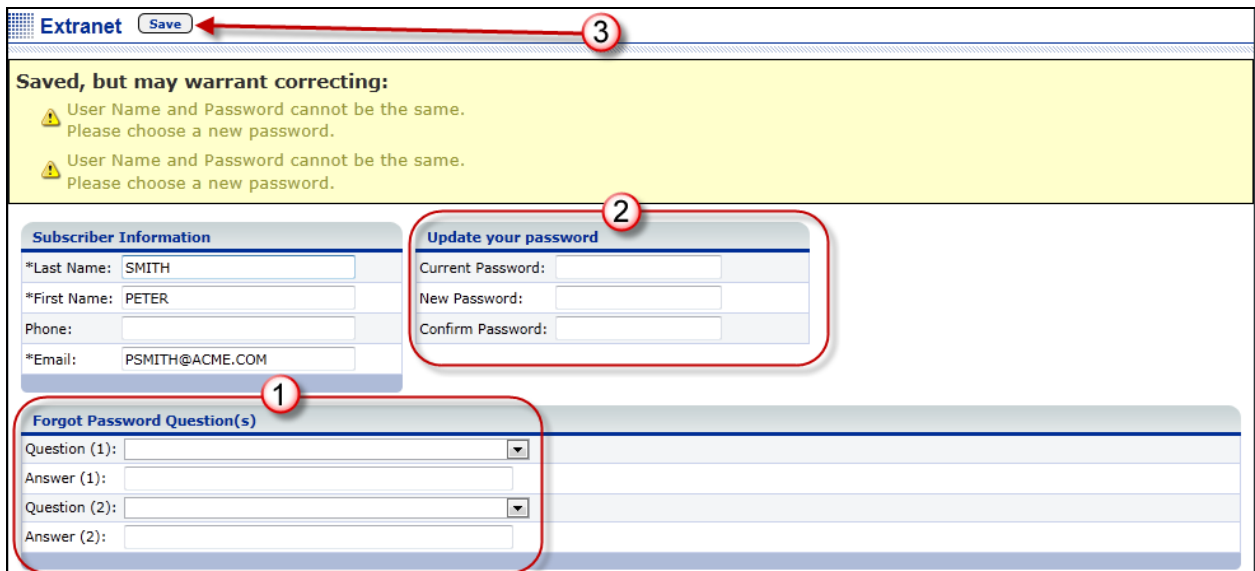


2. Enter your user id and password. You may be prompted for the Site Name or number if your username is not unique.
3. Click the **Login** button.

- You will see the Terms and Conditions screen.



- Check the box to agree to the terms and click the **Agree** button.
- You may be prompted to change your username and set-up the **Forgot Password Questions**. Make any changes and click the **Save** button. The screen will refresh.

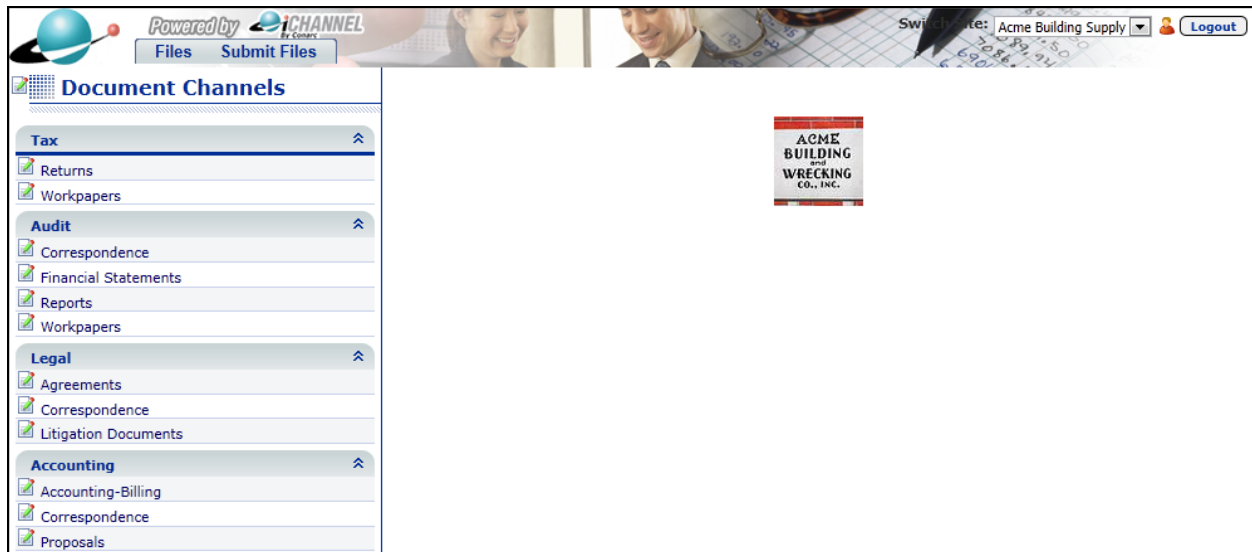


- Click the **Files** link at the top of the page.

Accessing Your Documents

Begin by clicking the **Files** link at the top of the page to view the document menu.

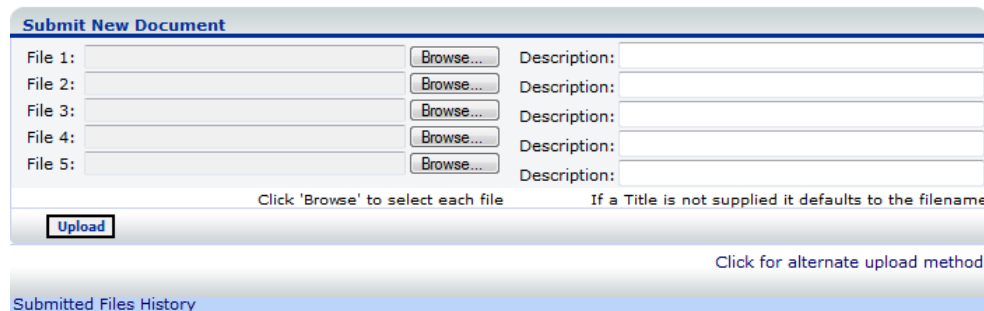
The menu is organized by Channels (headers) and Topics. Security controls what features you will have when working with your documents. Actions you may use are in grey boxes, such as adding documents. Once you click on a topic the documents will appear to the right in the Files List.



Adding Documents

The ability to add documents is controlled by iChannel security. There are two ways to add documents:

1. **Submit Files** - iChannel provides a means for you to submit documents for review. Using this method you would upload documents, but would not have access to them in the portal. GSS staff would need to add those documents to your portal and then publish the documents to the appropriate Channel/Topic on the portal for you to view them. This is the only way to ensure that documents are moved into the document management system correctly.
 - a. Click the Submit Files button
 - b. The **Submit New Document** screen will open.



- i. Click the Browse button to find the file from a disk, computer, network, CD, etc.
- ii. Supply a title or if no title is listed the existing file name will be used.
- iii. Click **Upload** to add the file. All documents you upload will be listed by clicking the link *Submitted Files History*.

2. **Add Documents** – Select the Topic where you want to add a document and it will be viewable on the portal by clicking the Topic name. The only means to add this document to your intranet document management system is to save it locally and then upload it to the appropriate file area.
 - a. Click the icon in front of the Topic name, then choose Add Document from the pop-up.
 - b. In the file listing screen, click **Add Document from your Computer or Network**.
 - c. The **Add New Document** screen will open.
 - i. Choose a category and subcategory
 - ii. Choose or enter any options listed.
 - iii. Click the Browse button to find the file from a disk, computer, network, CD, etc.
 - iv. Supply a title or if no title is listed the existing file name will be used.
 - v. Click **Upload & Finish** to add the file.

Changing Your Password

Once you log in to your portal you may want to change your password.

1. Click the My Profile tab at the top of the screen. Locate the Password area.
2. Enter your current password.
3. Enter your new password.
4. Re-enter your new password.
5. Click Submit at the bottom of the screen. You will receive confirmation on-screen in red when the password is changed.
6. Click the logout link at the upper right corner of the screen and then login again with the new password.

Changing Your Forgot Password Questions

1. Click the My Profile tab at the top of the screen. Locate the Password area.
2. Enter your current password.
3. Enter your new password.
4. Re-enter your new password.
5. Click Submit at the bottom of the screen. You will receive confirmation on-screen in red when the password is changed.
6. Click the logout link at the upper right corner of the screen and then login again with the new password.