NetClient CS

Document Management Portal User Guide

Version 8.x

Introduction to NetClient CS

This Guide is designed for portal users who will have access to the document management module in the NetClient CS portal. The NetClient CS portal is an extension of Mira + Kolena's website and provides a solution for you and Mira + Kolena to share and exchange electronic documents securely and quickly. It also allows a reduction in environmental waste by corresponding electronically instead of handling paper (e.g., less use of paper and less vehicle emissions to have documents delivered). Unlike emails and their attachments, the NetClient CS portal uses encryption technology so you and Mira + Kolena will have confidence knowing that the information is secure when transferred back and forth.

System Requirements for using the Document Management Module in the NetClient CS Portal

To access and use the NetClient CS portal, you need high-speed internet access. Also, NetClient CS and the Document Management Module require the use of Internet Explorer (version 7.0 or higher) web browser.
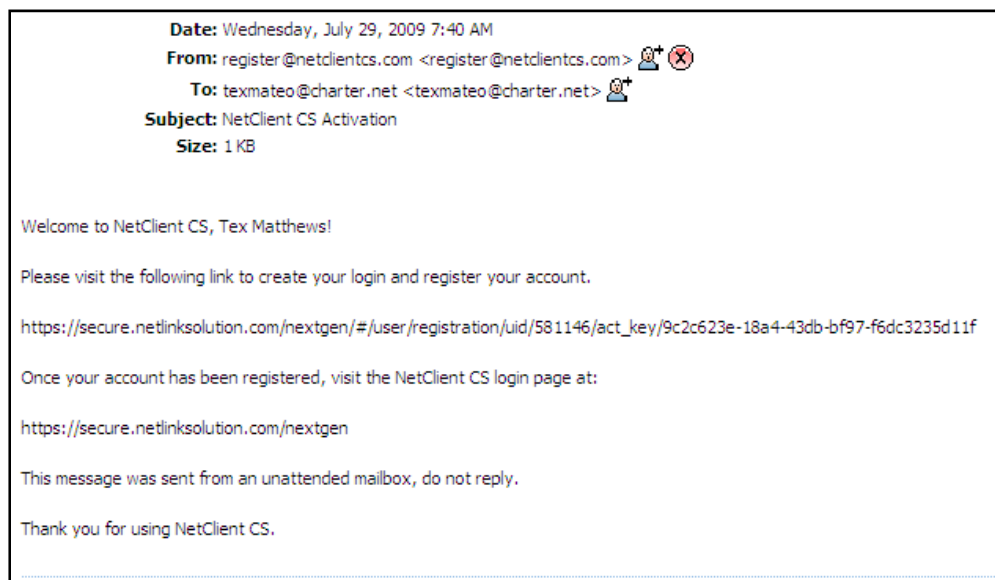
For more detailed system requirements, please visit the website below for the latest requirements:

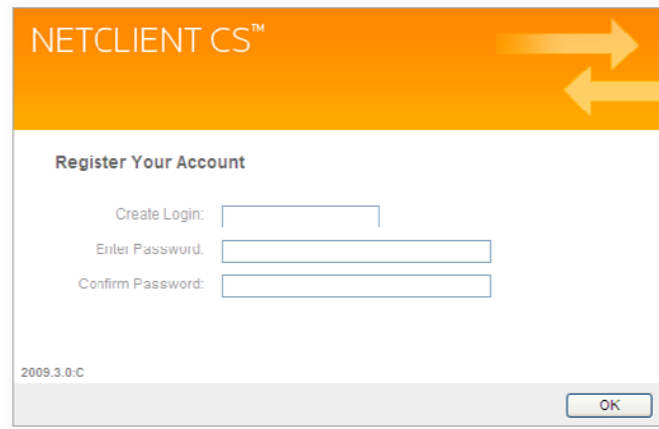http://cs.thomsonreuters.com/support/reference/sysinfo.aspx

Accessing and Using NetClient CS

To access NetClient CS, Mira + Kolena will create an account for you. You can receive access to the website via our website, www.mirakolena.com. You will then receive an email, where the email will contain a link (or URL address to copy and paste into the browser) to create a login and register your account. If you do not receive an email, please check your spam folder and then contact the firm.

Sample Login Email:

Date: Wednesday, July 29, 2009 7:40 AM
From: register@netclientcs.com <register@netclientcs.com>
To: texmateo@charter.net <texmateo@charter.net>
Subject: NetClient CS Activation
Size: 1 KB

Welcome to NetClient CS, Tex Matthews!

Please visit the following link to create your login and register your account.

https://secure.netlinksolution.com/nextgen/#/user/registration/uid/581146/act_key/9c2c623e-18a4-43db-bf97-f6dc3235d11f

Once your account has been registered, visit the NetClient CS login page at:

https://secure.netlinksolution.com/nextgen

This message was sent from an unattended mailbox, do not reply.

Thank you for using NetClient CS.

1. Once the email has been received go to the registration website and follow these steps:

    a. Enter your email address in the Create Login field

    b. Enter a password in the Enter Password field

    c. Re-enter the password in the Confirm Password field

Important Information about your Login and Password

- The password must be at least seven (7) characters long and must include letters and numbers (e.g. **password1**). You can also user symbols (e.g., %, $, #)

- Passwords are case sensitive (e.g. PassWord1)

- Users will be required to change their Passwords every 90 days for security purposes. Passwords cannot be reused for 9 cycles.

- If you forgot your password, you can request to have a new temporary password emailed to you.

- If ten consecutive, unsuccessful attempts are made to log in to an account, the login for that account is locked. An email message will be sent automatically to the email address assigned to the login; the email message notifies the user of the unsuccessful login attempts and provides a link to unlock the login immediately. The account will be unlocked when the user clicks the link within the email message or when the lock expires after 30 minutes.

    Note: **If you have any questions or issues with accessing your NetClient CS user account, contact Dennis Hoff at Mira + Kolena at 419-474-5020 or dhoff@mirakolena.com.**

    Note: **For future access and to login to NetClient CS after this initial login, visit www.mirakolena.com for a login button, or save the login site for NetClient CS as a Favorite in your browser.**

2. After successfully registering your NetClient CS account, confirm that your email address is in the Login field and enter your password that you just created and click on the Login button.

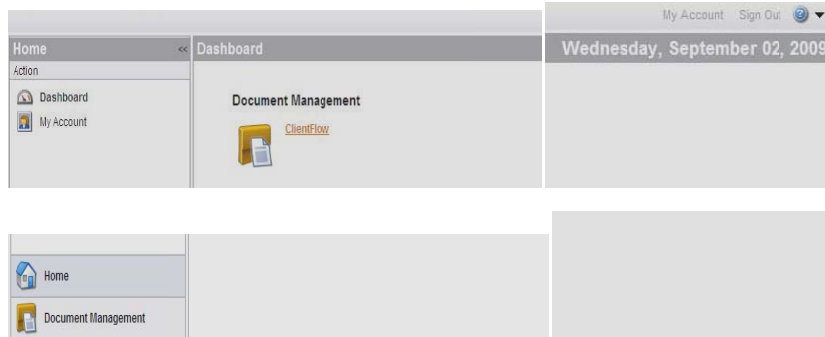Note: After logging in, the NetClient CS Home or Dashboard page will be displayed listing ClientFlow in the Document Management module.

Navigation Features of NetClient CS

Mira + Kolena, Ltd.
4841 Monroe St. Ste. 350 Toledo, OH 43623
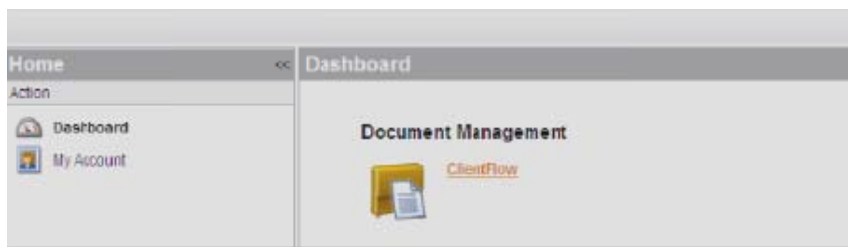419-474-5020 (phone) 419-474-5072 (fax)

A. **My Account –** Allows a user to view and update their Login, Name, Email Address and Password

B. **Sign Out –** Allows a user to sign out and end their session of using NetClient CS.

C. **Help Menu –** Provides a menu of help topics for using NetClient CS and ClientFlow.

D. **Dashboard –** Allows a user to view all applications they have access to in NetClient CS.

E. **Document Management –** Allows a user to view all Document Management applications they have access to in NetClient CS.

F. **Home –** Allows a user to return back to the Home view of the Dashboard to view all applications.

3. Click on ClientFlow to open the application.

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Navigation Features of ClientFlow in the NetClient CS Portal

A. **Document Index Value Columns** – Allows a user to view the index values given to each document. Each column can be moved by clicking and dragging it to a new location and each column can be re-sized by clicking and dragging its border. Documents are sorted alphabetically by File Section.

B. **Document List Page Navigation Buttons** – Allows a user to navigate between multiple pages of documents by going to the First Page, Previous Page, Next Page or Last Page.

C. **Refresh Document List Button** – Allows a user to refresh the list of documents viewable on the page.

D. **Document List Page Display** – Allows a user to navigate to a specific page number.

E. **Document Display Drop-Down** – Allows a user to select how many documents they can view on a page.

F. **Home/Up** – Allows a user to return back to the list of Client Names and Client Numbers for which you can see published documents for.

G. **Upload** – Allows a user to upload a document to ClientFlow.

4. Click on a Client Name or Client Number to see any documents for that client.

Note: No documents will appear here if Mira + Kolena has not published any documents to the NetClient CS portal for you to view, or you have not recently uploaded any documents.

5. Click on any document in the list to open the document up in view mode.

Note: Documents opened from NetClient CS are READ-ONLY and therefore cannot be edited and saved back to NetClient CS. If the document requires editing, save a copy to the local drive (File / Save As), edit it as necessary, and then upload it back to NetClient CS (uploading is discussed in the next steps).

Note: To view a document that is in NetClient CS, it requires the necessary software application to open and view the document. For example, if a document in NetClient CS is a Microsoft Word file, you will need to have Microsoft Word installed to your local workstation to open and view the document.

6. Click on the in the upper right hand corner of the window to close the document after viewing it.

7. Click on HOME or UP icons, to return back to the list of Client Names and Client Numbers for which you can see published documents for.
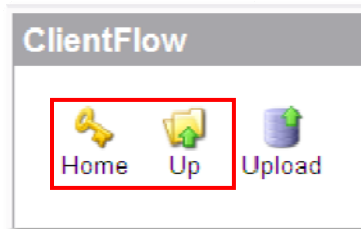
8. To upload a document into ClientFlow, select a client from the list and then click on Upload.
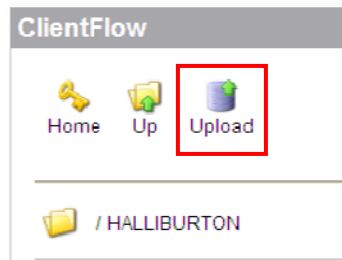
9. Click on the Browse button to search for the document you want to upload to ClientFlow.
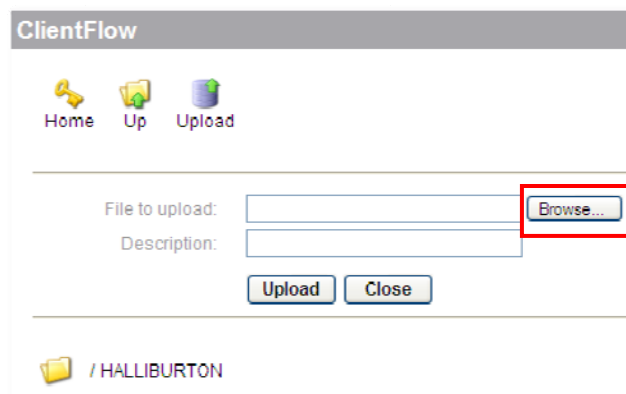
Note: If you do not want to upload a document, click the Close button to close the upload option.

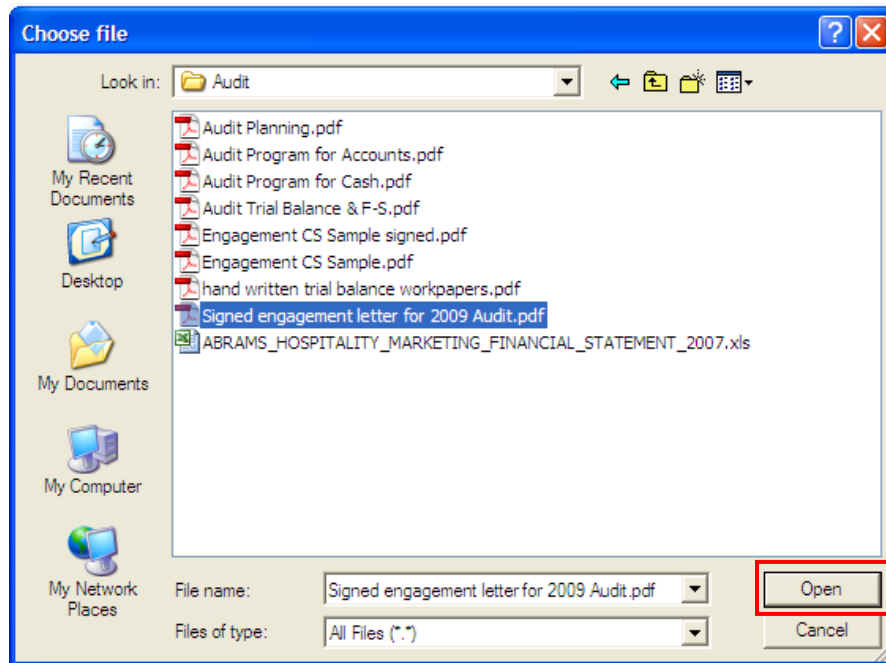10. In the Choose file window, find the document you want to upload, select it and click on the Open button.

11. Enter a description about the document that you will be uploading.

Note: You can add up to 225 characters of text to describe your document.

12. Click on the Upload button to upload the file to NetClient CS and make it viewable to Mira + Kolena.

Note: If Mira + Kolena has the Auto-Publish feature turned on, after the document has been uploaded, the document will become viewable in your list of documents in NetClient CS. This feature provides you a record of the documents you uploaded to Mira + Kolena through NetClient CS.

13. After viewing or uploading documents, click on Sign Out to end your session with using the NetClient CS portal.

Important Information about Documents Uploaded through the NetClient CS Portal

- Any type of document or file can be uploaded with NetClient CS and viewed in its native format except for TIFF files.

    o TIFF files will be converted to PDF files when viewed by the firm.

- Approximately 400 MB is the maximum file size that can be uploaded to NetClient CS at one time.

    o A NetClient CS session may time-out if the Internet connection is not fast enough to completely upload the document(s) within 3 hours.

- Individual documents or files can be uploaded to NetClient CS one at a time. Multiple documents/files may be uploaded at one time if they are located in a single folder.

- The firm MAY NOT be automatically notified when a user uploads a document to NetClient CS. Please contact Mira + Kolena to let them know when documents have been uploaded.

- Mira + Kolena determines which documents you can view by publishing them to NetClient CS. At any time Mira + Kolena can unpublish a document where you will not be able to view it.

Mira + Kolena's Contact Information for Support of NetClient CS

Firm Name: Mira + Kolena, Ltd.

Firm Contact: Dennis Hoff

Firm Phone: 419-474-5020

Firm Email: dhoff@mirakolena.com

Firm Web Site: www.mirakolena.com