

# HD Portal – Upload Files to Hancock & Dana

- 1) Login to the Portal located at <https://portal.hancockdana.com/ClientPortal>
- 2) In the Document List page, select **Add Document**.

The screenshot shows the ProSystem fx Client Portal interface. The page title is "Document List" and the portal name is "Training Client - Client Files". The left sidebar contains a "Document" menu with "Add Document" and "Add Hyperlink" options. The main content area displays a table of documents with columns for File App, Keyword, Publication Status, Mode, Document Name, and File Size. A single document is listed: "Trial Balance.xls" with a file size of 15. The "Add Document" link in the sidebar is highlighted with a red box.

| File App                 | Keyword | Publication Status | Mode  | Document Name                     | File Size |
|--------------------------|---------|--------------------|-------|-----------------------------------|-----------|
| (All)                    |         | (All)              | (All) |                                   |           |
| <input type="checkbox"/> |         | Published          | R     | <a href="#">Trial Balance.xls</a> | 15        |

The Hancock & Dana Portal is designed to work with Internet Explorer versions 6 through 8. Please make sure [portal.hancockdana.com](https://portal.hancockdana.com) is added to your list of trusted sites.

3) Select the **Browse** button on the next screen and add the files you wish to upload.

The screenshot shows the 'Add Documents to Portal' interface. The 'Client Information' section has 'Client Name' set to 'Training Client - Client Files', 'Portal Area' set to 'Collaboration', 'Cabinet Name' set to 'Document Cabinet', and 'Folder Name' set to 'Client to Hancock & Dana'. The 'Advanced Upload' table is currently empty. The 'Browse' button is circled in red.

| Filename | Keyword | Cabinet | Folder |
|----------|---------|---------|--------|
|----------|---------|---------|--------|

4) Press the **Upload** button to send your files to Hancock & Dana. [Note: If you selected the wrong file(s), simply check the box next to the files you want to remove and press the **Remove** button located next to the **Browse** button]

The screenshot shows the 'Add Documents to Portal' interface. The 'Advanced Upload' table now contains one row with 'Doc1.docx'. The 'Upload' button is circled in red.

| Filename                                      | Keyword | Cabinet          | Folder                   |
|---|---------|------------------|--------------------------|
| <input checked="" type="checkbox"/> Doc1.docx |         | Document Cabinet | Client to Hancock & Dana |

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