

THOMSON REUTERS™

PASSWORD RESET GUIDE

FOR TAX YEAR 2021

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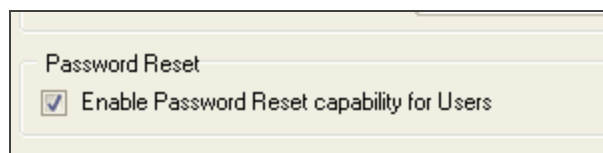
PASSWORD RESET

Users now have the ability to reset their passwords without having to rely on their administrators to do it for them. The password reset process sends an email to the user with a link and an encrypted token embedded in the text of the email for the user to follow. The process uses the email address stored in the User Info for each user.

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FIRM CONFIGURATION

The password reset capability is Firm selectable, so the Firm administrator must turn it on in **Firm Configuration** for their users to be able to take advantage of it. Users who try to use it without it being turned on for their firm will get a notification that it is not available for them. The **Firm Configuration** option exists under the **General Options** tab as follows:



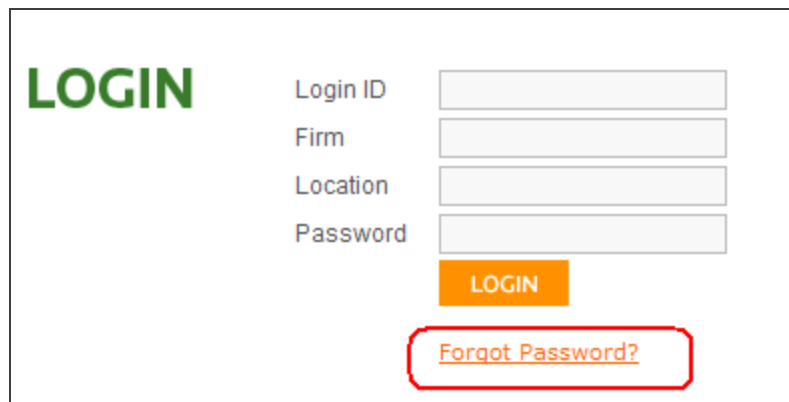
The screenshot shows a web interface for 'Firm Configuration'. Under the 'General Options' tab, there is a section titled 'Password Reset'. Within this section, the checkbox 'Enable Password Reset capability for Users' is checked.

Figure 1

 Once a firm has enabled the password reset capability, the email address field becomes mandatory when a new user is created.

PROCEDURE FOR RESETTING A PASSWORD

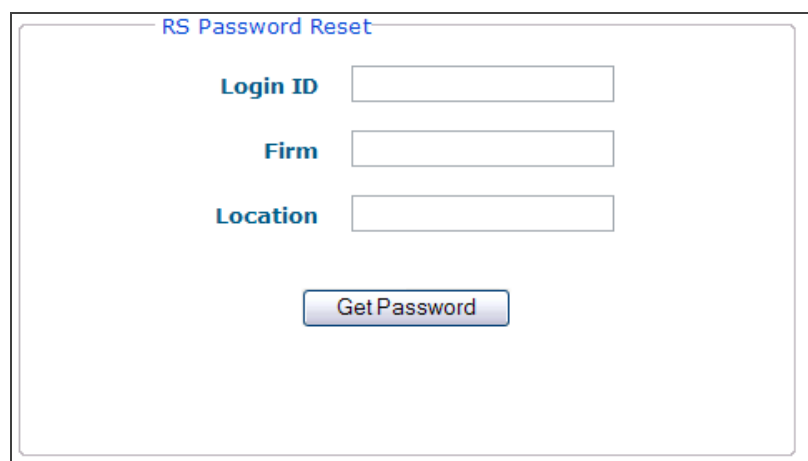
The password reset feature is accessible via the **Forgot Password?** link on the login page.



The image shows a login interface. On the left, the word "LOGIN" is displayed in large green letters. To the right, there are four input fields stacked vertically, labeled "Login ID", "Firm", "Location", and "Password". Below these fields is an orange button labeled "LOGIN". Below the button is a red-outlined box containing the text "Forgot Password?" in red, underlined font.

Figure 2

1. Click the **Forgot Password** link.
2. You will be prompted for your LoginID, Firm, and Location.



The image shows a "RS Password Reset" form. At the top, the text "RS Password Reset" is displayed in blue. Below this, there are three input fields stacked vertically, labeled "Login ID", "Firm", and "Location". Below these fields is a blue button labeled "Get Password".

Figure 3

3. Enter all requested information.
4. Click the **Get Password** button.

5. You will see a dialog containing the current email address stored in the system for the user and asking you to confirm the email address.



Figure 4

6. If you do not have an email address stored in the system, you will receive a dialog stating this and suggesting that you contact your administrator.

7. Once you confirm your email address, click **Continue**. You will receive a dialog that an email has been sent to your inbox.

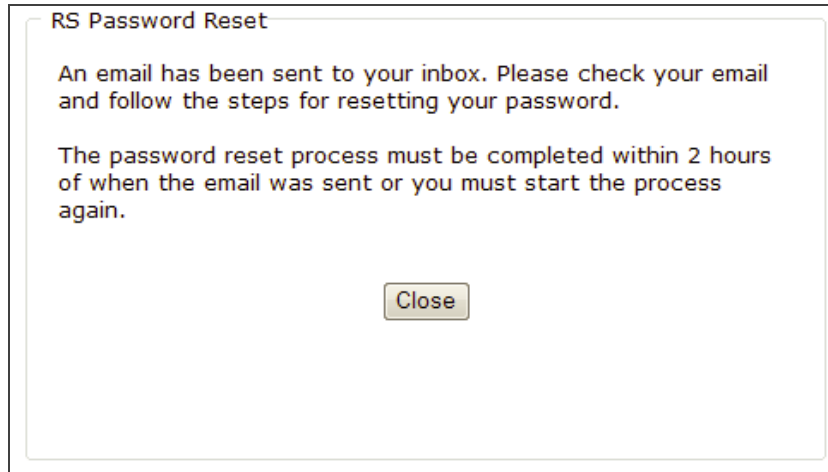


Figure 5

For security reasons, you must complete the password reset process within the two-hour time frame as seen above. A temporary token associated with the request will expire after two hours. If you do not use the temporary token within the two hours, it will expire, and you must restart the password reset process.

8. You will receive an email with instructions similar to the following:

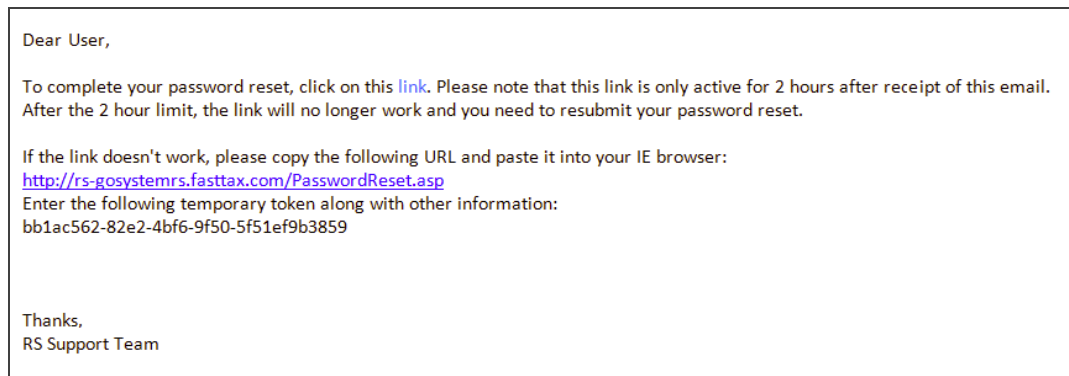
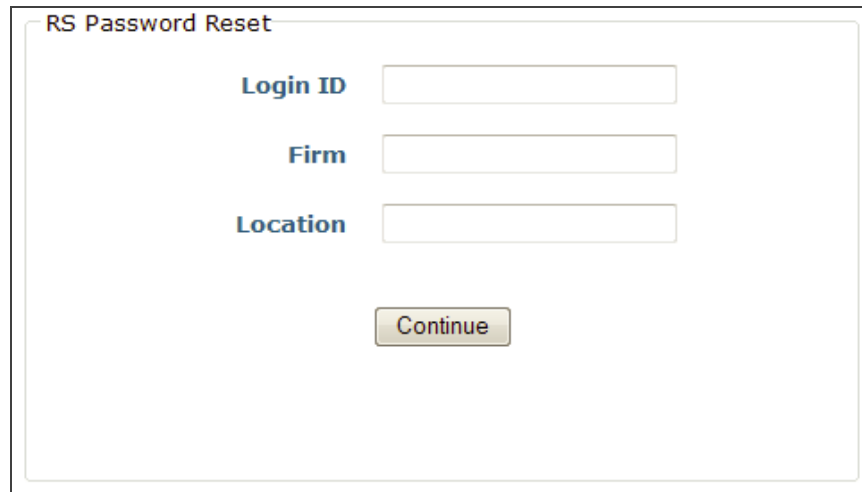


Figure 6

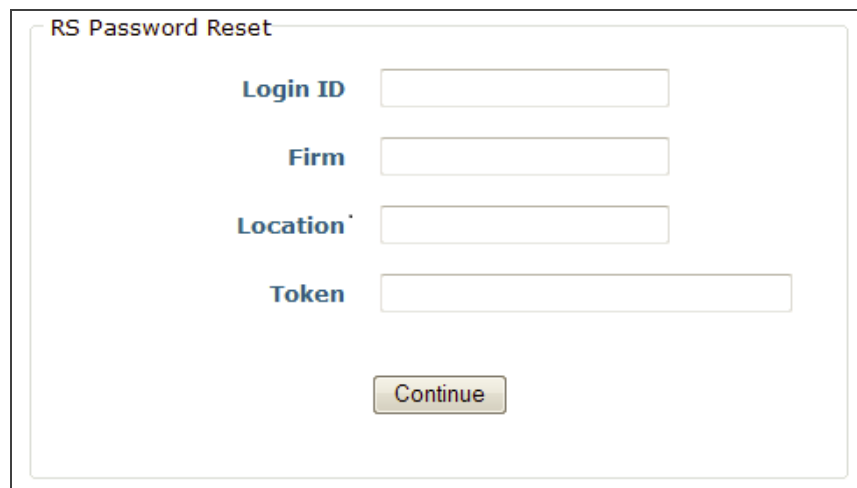
9. Click the link in the email to go to the following page, where you will enter your Login ID, Firm, and Location:



The screenshot shows a web form titled "RS Password Reset". It contains three text input fields labeled "Login ID", "Firm", and "Location". Below these fields is a "Continue" button.

Figure 7

10. If the link does not work, as the email states, you can copy and paste the URL into your browser. This takes you to a slightly different page with an additional field to enter the temporary token:



The screenshot shows a web form titled "RS Password Reset". It contains four text input fields labeled "Login ID", "Firm", "Location", and "Token". Below these fields is a "Continue" button.

Figure 8

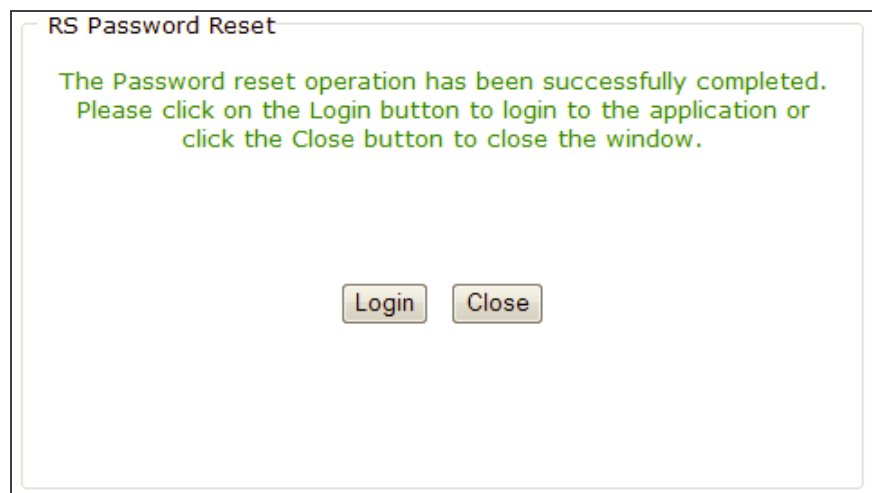
11. Select **Continue**. You can then enter a new password:



The screenshot shows a dialog box titled "RS Password Reset". Inside the dialog, there are two text input fields. The first field is labeled "Enter New Password" and the second field is labeled "Re-enter New Password". Below these fields is a button labeled "Save Password".

Figure 9

12. A final dialog confirms that the password reset was completed:



The screenshot shows a dialog box titled "RS Password Reset". Inside the dialog, there is a green text message that reads: "The Password reset operation has been successfully completed. Please click on the Login button to login to the application or click the Close button to close the window." Below the message are two buttons: "Login" and "Close".

Figure 10

13. You will also receive a confirmation email after the process is complete:

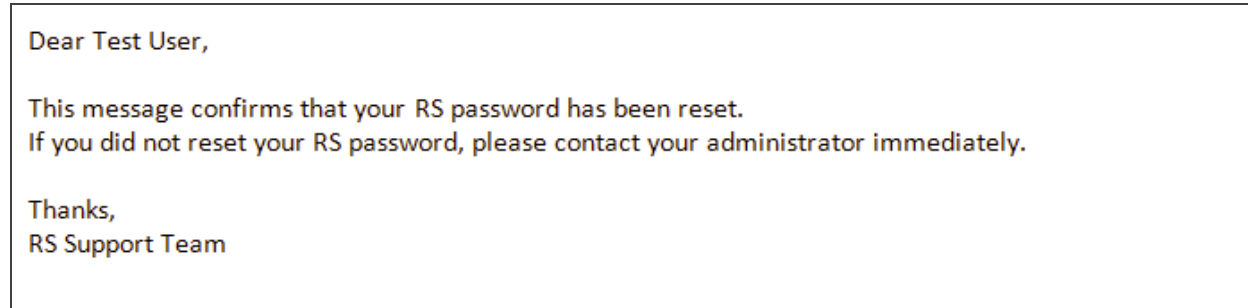


Figure 11

HISTORY RECORDS

History records are written for you when:

- the password reset has been requested
- the password reset process is complete.

SPECIAL SITUATIONS

If you are locked out after having entered the wrong password too many times, you are allowed to use the password reset feature. Once the password reset process is complete, you will no longer be locked out.

If you are disabled as a user (an administrator has disabled your Login ID within Access Control), you will not be able to use the password reset feature as long as your Login ID is disabled.

The password reset link/temporary token can only be used one time. If you try to use it a second time, you will get the following error message:

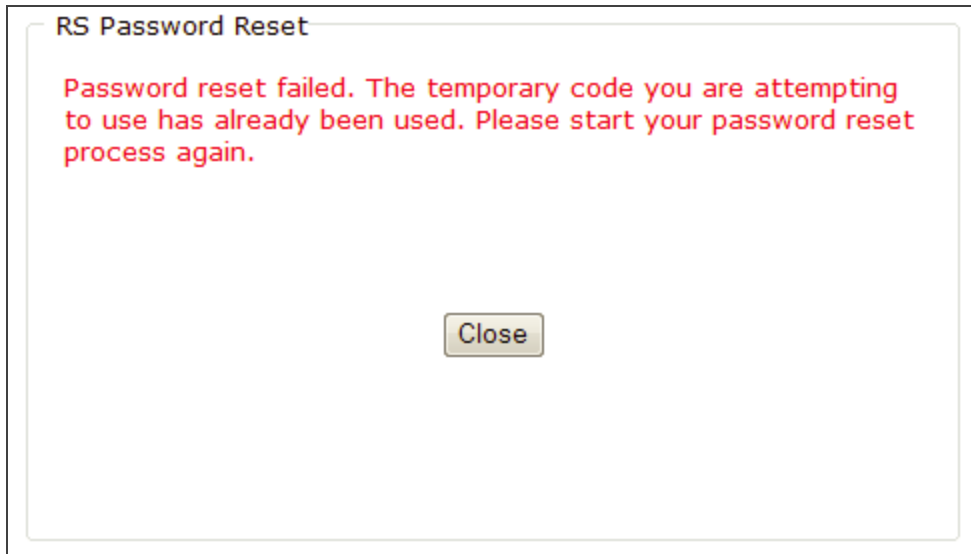


Figure 12

EMAIL ADDRESS IMPORT

We have implemented a new feature as a result of the password reset. Since email addresses are required for the password reset process to work, we have added an email address import to the system. The import can be found under **Admin > Access Control Imports** as follows:

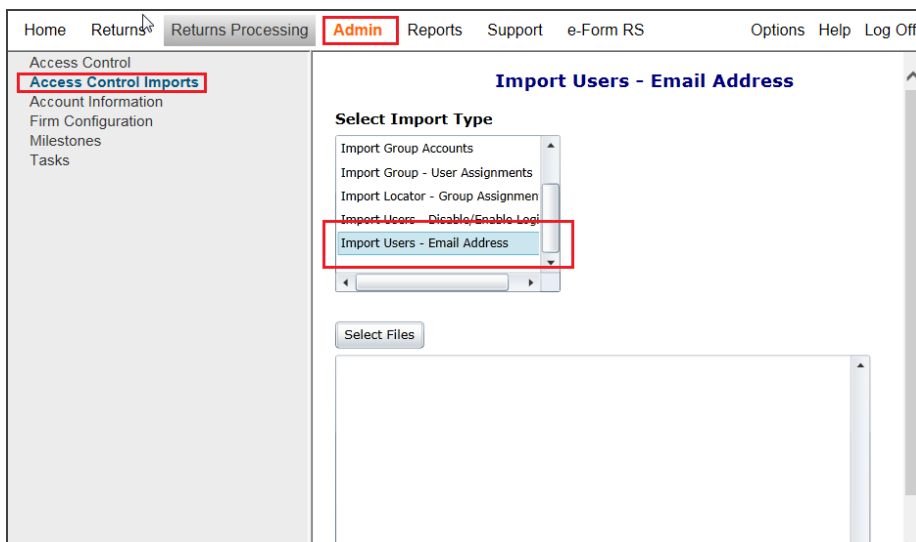


Figure 13

The import functions like most of the other imports available within **Access Control Imports**. It requires a CSV import file containing Login ID, Location, and email address for each user being updated.

The following illustrates an example of an email import .CSV file.

A	B	C	D
BDOE	Boston	abc@xyz.com	
allrights	***	abc@xyz.com	
nyorker	New York	abc@xyz.com	
alogin	DALLAS	abc@xyz.com	
TEST100	San Diego	abc@xyz.com	
guest1	***	abc@xyz.com	
JDOE	Houston	abc@xyz.com	
guest3	****	abc@xyz.com	

Figure 14

To import the user's email address:

1. Highlight the **Import Users – Email Address** option in the **Select Import Type** list.
2. Choose the **Select Files** option. Search your hard drive or network for the correct .csv file with the user email data.

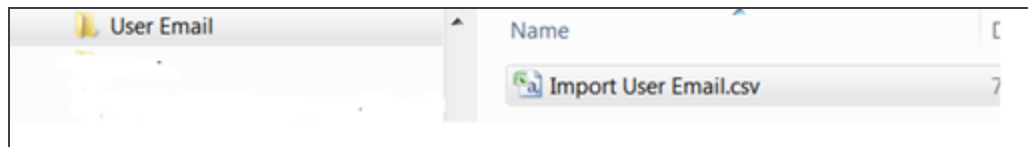


Figure 15

3. Highlight the .csv file. Make sure that the correct file is listed in the **File** name field of Explorer.

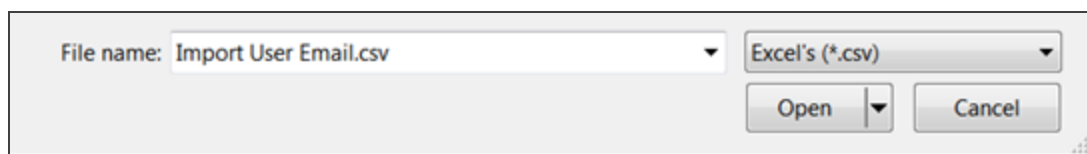


Figure 16

- Click the **Open** button. The .csv file will appear in the **Selected Files** field of the **Import** function.

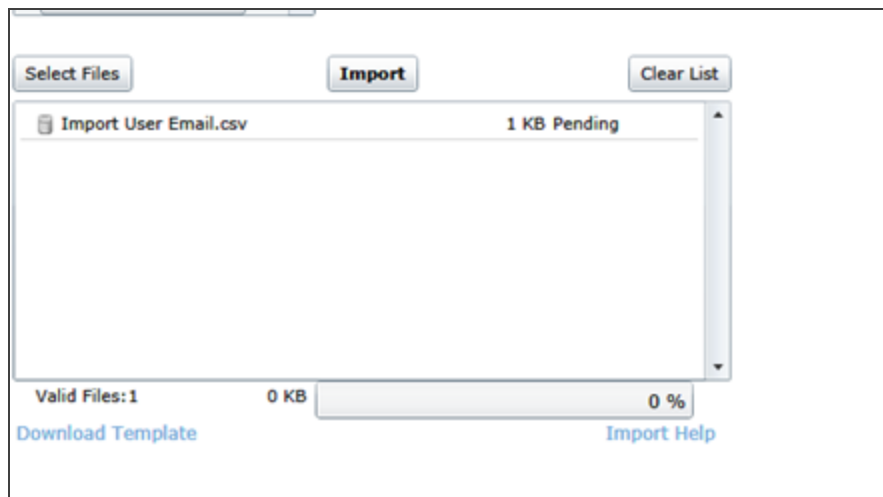


Figure 17

- Click **Import**. The .csv file will be imported, adding new email addresses or changing existing email addresses for the users listed in the import file.

A screen will appear with the import results for each user on the .csv file.

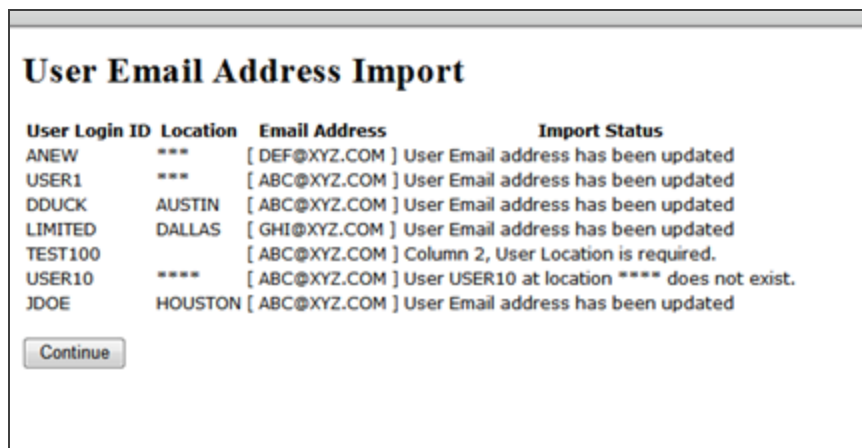
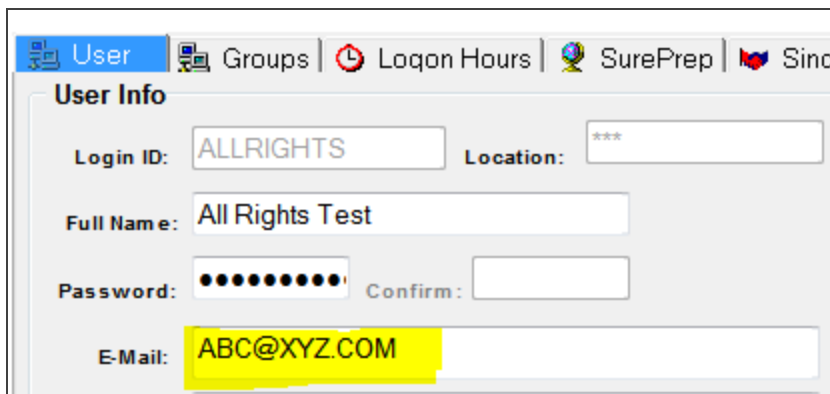


Figure 18

- Click **Continue** to return to the **Import New Users** screen.

Confirming the Email Address

You can view the results of the email import function for each user listed on the .csv file by looking in the **Access Control > Users** tab.



The screenshot shows a web application interface with a navigation bar at the top containing tabs: User, Groups, Logon Hours, SurePrep, and Sing. The 'User' tab is selected. Below the navigation bar is a 'User Info' form. The form contains the following fields: 'Login ID' with the value 'ALLRIGHTS', 'Location' with three asterisks '***', 'Full Name' with the value 'All Rights Test', 'Password' with ten dots, and 'Confirm' (empty). The 'E-Mail' field contains the value 'ABC@XYZ.COM', which is highlighted with a yellow background.

Figure 19