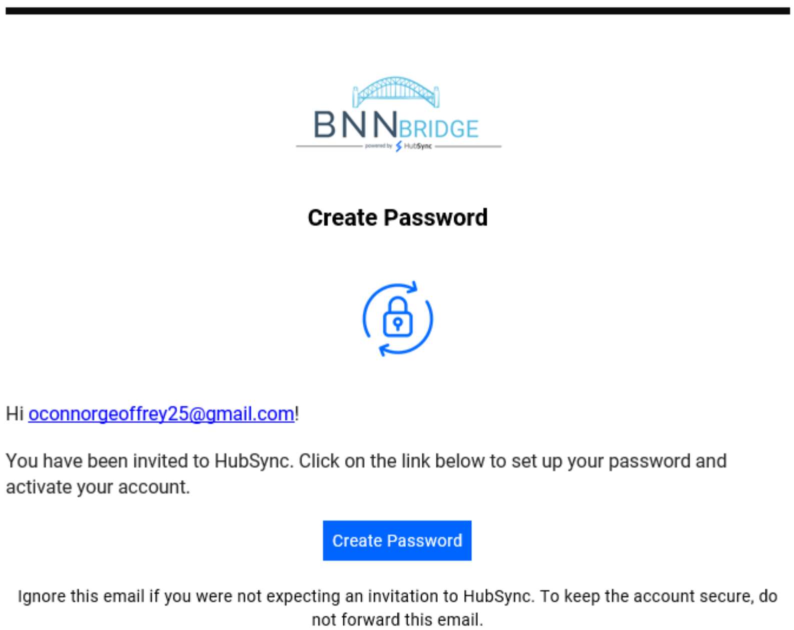
General Navigation in BNN Bridge

Invitation and Logging In

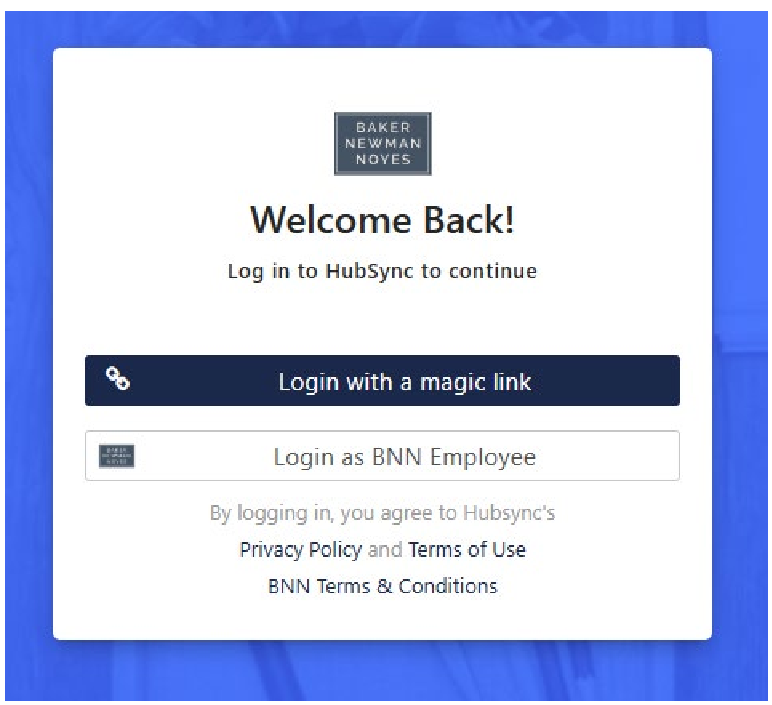
You will receive an email invitation to create a Password via email like the one below. The email will come from **Baker Newman Noyes** <no-reply@hubsync.com>. This is not spam!

Click the Create Password button to get started; You cannot enter BNN Bridge without this step. You will be routed to a different page to verify your identity and be given recovery codes in case of lockout.



Once that step is complete, you will either head straight to the BNN Bridge or be guided back to the BNN Bridge Log In page. The URL for BNN Bridge is here: Log In

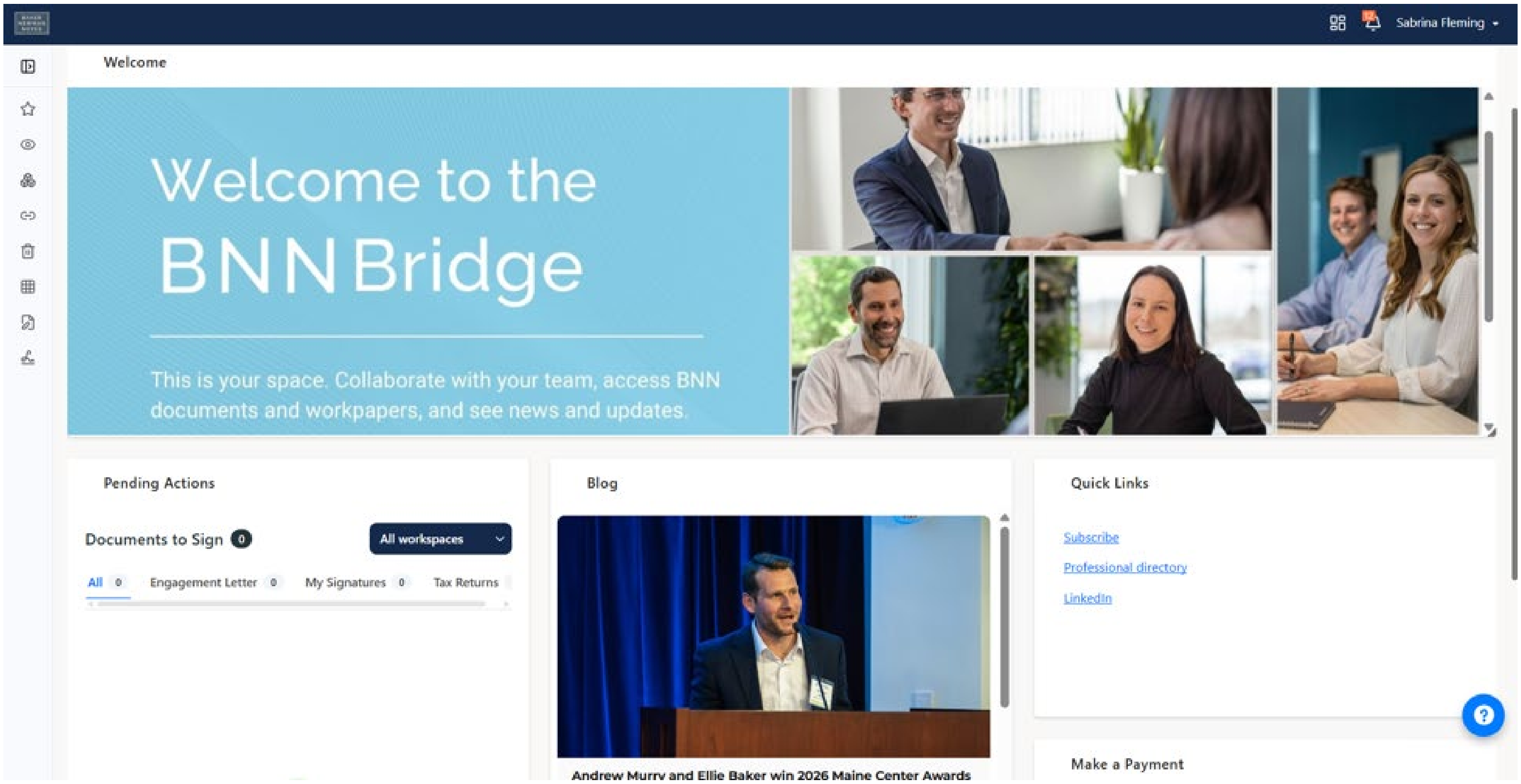
You will log in using the *Login with a magic link* option. This triggers an email to be sent to you, and in that email will be a secure link to access BNN Bridge!



We recommend that all clients submit a request with their IT department to whitelist no-reply@hubsync.com. This ensures that you receive all email notifications from the BNN Bridge, including your Magic Link login requests.

Gateway

The Gateway page is the first page you are brought to after logging in.



The Gateway includes:

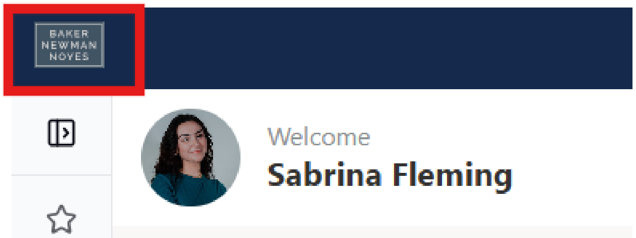
- BNN News Feed
- Quick links to our LinkedIn, Professional Directory, and other sites
- Payment link
- An overview of pending actions and your documents

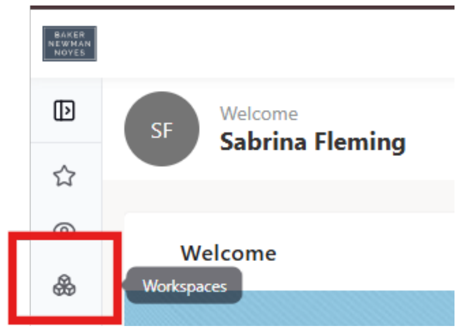
You can customize your tile sizes and layout by dragging the bottom right corner of each tile. Please note that the tiles and links in the Gateway are subject to change as the product evolves over time!

You can always return to the Gateway by clicking this button at the top right.

Workspaces

After you review your Gateway for updates to the BNN blog or seeing new pending items, you will head to the Workspaces area. This is where you will see your different engagements with BNN. You can always find your Workspaces by clicking the Baker Newman Noyes icon in the top left corner of the screen, or the cube icon just below the Baker Newman Noyes icon!





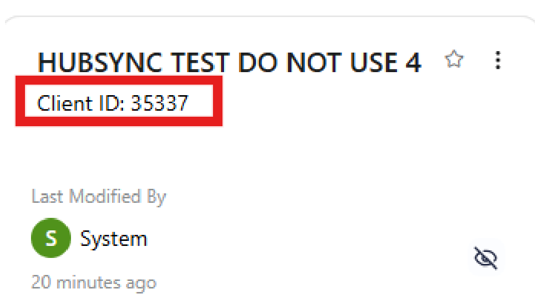
What is a Workspace?

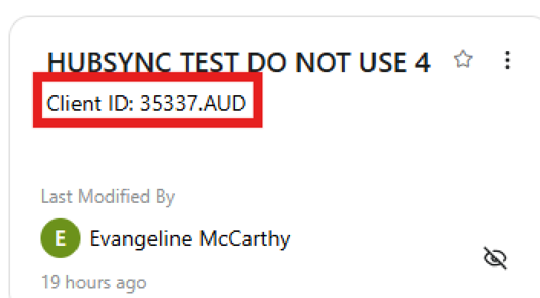
Think of a workspace as your home base for completing tasks for a specific engagement. If you utilize BNN for audit work, you will have a workspace for that. If you use BNN for your tax return, you will have a workspace for that. If you utilize BNN for Business or Healthcare Advisory services, there will also be a workspace for that.   These workspaces will be the location for document sharing, reviewing documents, and even signing off on tax returns. Some individuals or companies may have more than one workspace, others may only have one! That is okay and it is specific to your work with Baker Newman Noyes.

All of your workspaces will be titles as your company or individual name. This means if you have three workspaces, they will have the same name. We understand this could be confusing. You can differentiate between workspaces by using the client ID or by looking at the contents inside of the workspace.

Client IDs for Business Technology would be client number.BTA
Healthcare Advisory would be client number: HCA
Audit would be client number.AUD
Tax would be the client number by itself

See the example to the right: HubSync Test Do Not Use 4 has both a Tax and Audit workspace.

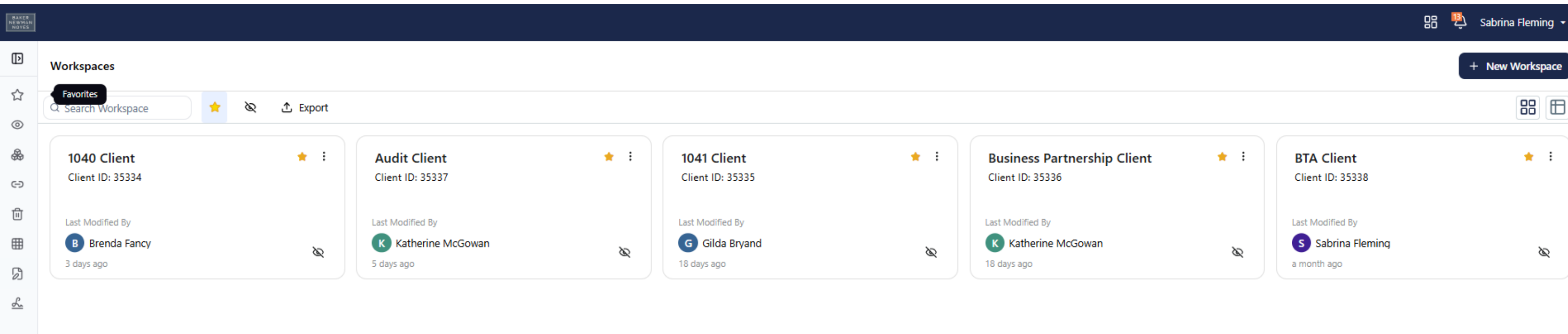




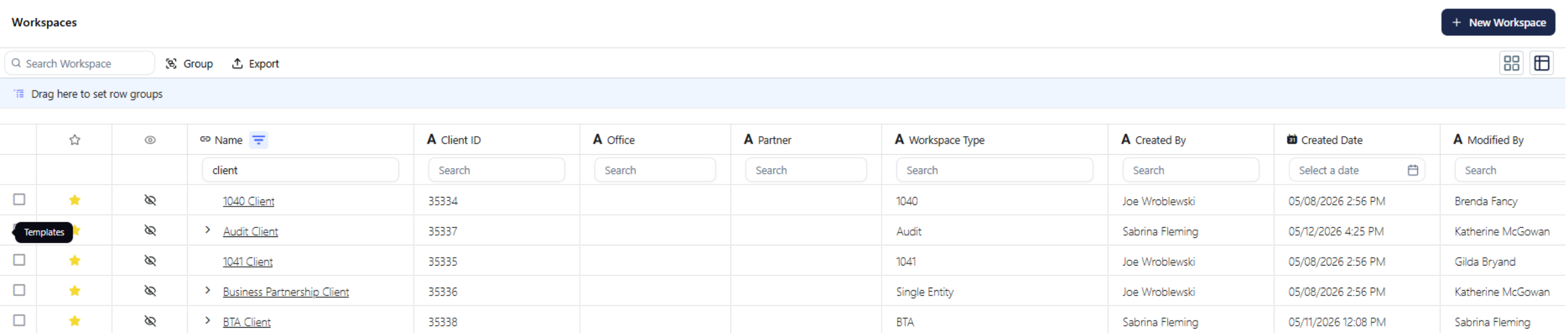
Workspace Views

Users can view workspaces in either grid or tile format. You can also search and favorite this area!

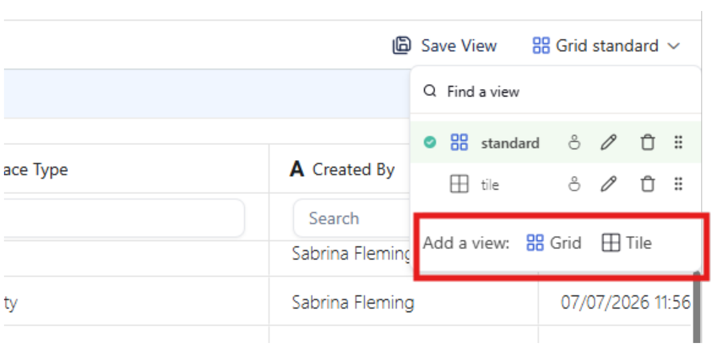
Tile Format



Grid Format



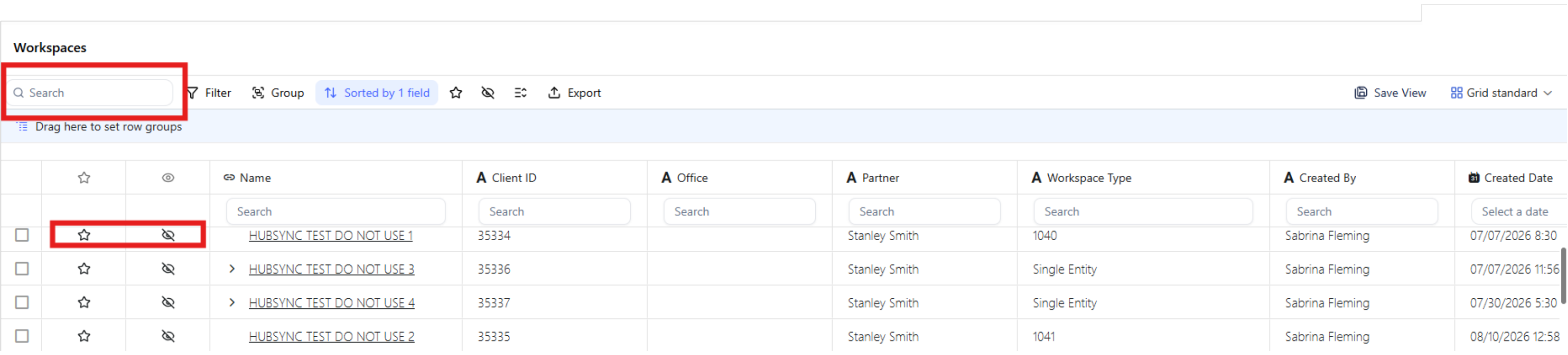
You can toggle between tile and grid view by going to this button at the right hand corner. Choose a view to add and make sure you save your view!



Navigating Workspaces

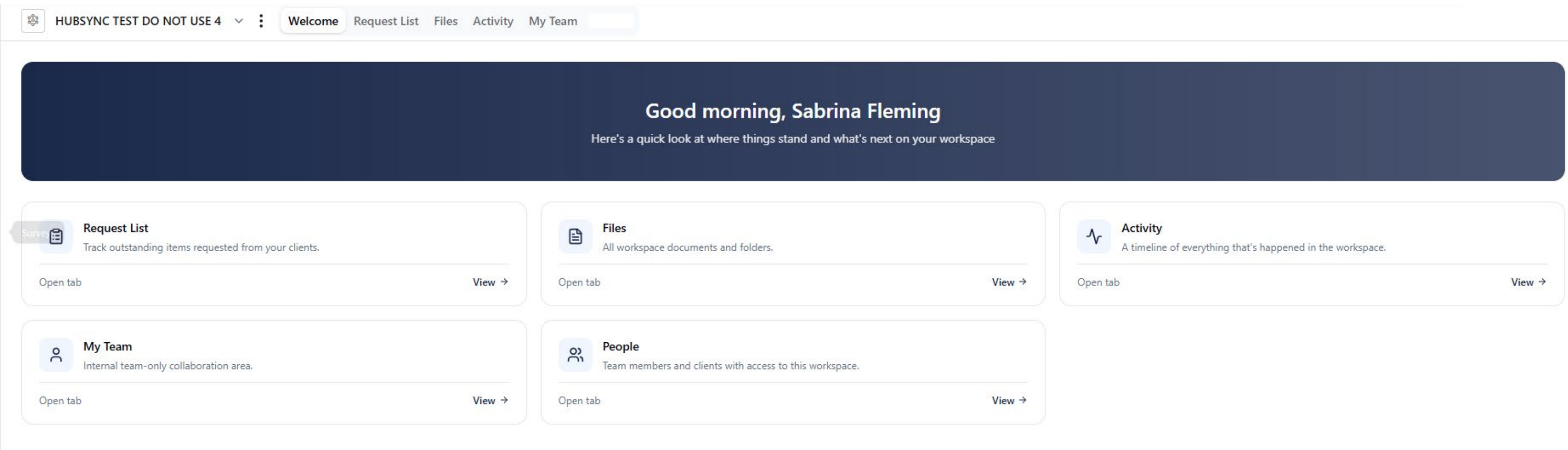
You can search all of your workspaces using the Search Bar.

You can favorite workspaces using the star. You can also select the eye icon to “watch” a workspace, which allows you to see notifications for the workspace even if you have turned all notifications off. You can click the star or eye icons at the top of the page to sort by these in both the tile and grid view.



In Your Workspace - Audit

Select the workspace you want to work in. Within your workspace, teams can manage multiple request lists, folders, years, or audit-related workflows. Because the same workspace continues year over year, prior-year materials should be organized through folders, archived request lists, or renamed prior-year lists rather than by creating a new workspace each year.



The above screenshot is what you will see when you click on a workspace.

Welcome – A general overview of the other available tabs to you in the workspace.

Request Lists - Very similar to Suralink, this is an area where you will be uploading documents as requested by your BNN Engagement Team.

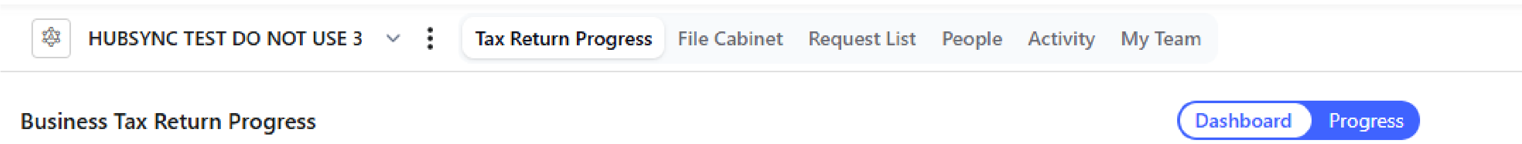
Files – The Files tab is a document repository where uploaded files are stored and organized.

Activity – The Activity Tab is an audit trail showing user activity such as uploads, downloads, and changes. Activity can be filtered by type or user. This is seen by both you and the BNN Team!

My Team - The My Team area is intended to show you your BNN engagement team. This may not show data depending on your engagement team.

In Your Workspace – Tax

Workspaces are comprised of different modules across the top of the workspace. An example is below. A brief explanation of each module is below, and Tax Return has its own section in the guide. Every workspace will have these modules.



File Cabinet – A document repository where uploaded files are stored and organized. The folders below will automatically come with your workspace.

- BNN Provided
- Client Provided
- CCH PDF Source File(s)
- Client Copies
- Agreements and Authorizations
- Permanent Documents
- Notices

Activity – The Activity Tab is an audit trail showing user activity such as uploads, downloads, and changes. Activity can be filtered by type or user. This is seen by both you and the BNN Team!

My Team - The My Team area is intended to show you your BNN engagement team. This may not show data depending on your engagement team.

People - The People Tab is where an Administrator can see the members of the workspace and add other team members. Not everyone will be able to see the People tab, so if you do not see it, it is okay!

Request Lists – This tab is only found in entity workspaces. This is where you will upload documents requested by your BNN engagement team.

Tax Return/Tax Return Progress

The most important tab for tax users in BNN Bridge is Tax Return or Tax Return Progress. There is a toggle at the top labeled Dashboard | Progress.

This is a dynamic toggle. The Dashboard View shows you the below images depending on
the tax type. It is an overview of the necessary steps for completing the return, as well as the status of the steps. The Progress toggle is where you will actually do work in the Tax Return Tab.
Clicking on the “Review/ and Sign” steps on the Dashboard also brings you to the Progress area of the Tab.

The Tax Return Tab may start with five tiles for you, and grow. It may remain the same! If you are receiving an Engagement Letter in BNN Bridge, a new tile will appear. It is okay if your workspaces look different between one another if you have multiple returns with BNN!

Important Note for 1040/1041 clients: Your workspace may not have this tab launched yet! If your organizer has not been released yet, your workspace will look like the below screenshot and not include the Tax Return Tab. Once your organizer is released, it will include the Tax Return tab!

If you are managing a multi-entity group, you will see that all entities are currently broken out by return and not grouped altogether in one workspace.

Dashboard (1) and Progress View (2)