



GEMS Cloud

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GEMS Cloud

§1.01 Introduction

You can now launch the Gillett Estate Management Suite in the cloud, permitting you to create and access data files from any internet connected device that uses the Windows operating system. If you license GEMS Cloud, you will always be running the latest versions of each module, eliminating the need to update GEMS on your local network and computers. GEMS Cloud will also eliminate connectivity issues that you may be experiencing on more complicated network installations.

- ▶ A GEMS license is limited to a single geographic location, and you must have a separate license for each office that uses GEMS. If your firm licenses GEMS Cloud, only professionals in a licensed office are authorized to access the cloud application.

If you license GEMS Cloud, you will still be able to install and launch GEMS from a local installation. Beginning with the 2023 edition, GEMS Cloud permits you to access annual editions of GEMS for which you have a GEMS license even if those editions are not installed locally.

- ▶ You must continue to use a local installation to access GEM706 and GEM709 data files for years prior to 2023.

You must purchase a seat to access GEMS Cloud. If you have a GEMS single user license, you can only purchase one seat. Like a single user license, any professional in a licensed office can access GEMS Cloud, but only one person at a time. Even if a person is using GEMS from a local installation, you will be able to launch GEMS Cloud. Similarly, if someone is using GEMS Cloud, another person will be able to launch GEMS from a local installation.

If your office has a multiple user license, you can purchase multiple seats. If you purchase two seats, any two members of your licensed offices can access GEMS Cloud simultaneously. Even though there might be five professionals that need access, it is unlikely that they will need access concurrently. If your seats are occupied, additional users in a licensed office can always access GEMS from a local installation.

GEMS Cloud is installed on a dedicated server that is owned, maintained, and secured by Microsoft Azure. GEMS Cloud uses GraphOn Corporation and its GoGlobal application controller to host GEMS Cloud. GoGlobal is a remote access application that allows users to run Windows applications installed on a remote server.

You will continue to store your data files on your network or local computers to eliminate concerns about the security of cloud storage. This can include file sharing devices such as Dropbox. Your firm's own firewalls and safeguards will continue to protect your clients' confidential information.

- ▶ By maintaining your files on your local computer, GEMS Cloud helps to ensure that you don't have two copies of the same data file and that you are always editing the most recent version.

When you edit a data file, GEMS Cloud uploads the file to the cloud to eliminate the need to regularly communicate with your local computer. When you are finished, the file is returned to your local drive. GoGlobal uses AES symmetric encryption to encrypt the file while uploading and downloading the file from your local computer to GEMS Cloud. For more information with respect to GoGlobal's security protocols, see <https://www.graphon.com/blog/zero-trust>. For more information with respect to AES security protocols, see https://en.wikipedia.org/wiki/Advanced_Encryption_Standard. Once GEMS Cloud obtains access to the file, it immediately encrypts the data using the same encryption method, and the file remains encrypted while it is open in GEMS Cloud. In addition, Microsoft Azure, the cloud host, adds an additional layer of encryption while hosting GEMS. See <https://learn.microsoft.com/en-us/azure/virtual-machines/disk-encryption-overview>.

- ▶ GEMS Cloud has access to your data file only while you edit that file and never retains a copy in the cloud when you exit. During uploading, editing, and downloading, your file remains encrypted.

To further secure your data, GEMS maintains separate executable codes in the cloud for each firm. In other words, every firm has its own separate installation of GEMS in the cloud.

As explained in the GEMS manuals, you have the option of encrypting data files by assigning a unique password to each file. See **§11.09** of the GEM706 manual, **§10.28** of the GEMAcct manual, and **§8.17** of the GEM709 manual. When you use GEMS Cloud to access a password protected file, you will be asked to first enter the assigned password. Password protected files are already encrypted on your local drive and remain encrypted while they are uploaded, edited, and downloaded as explained above.

When you license GEMS Cloud, you will receive a Cloud Supervisor code. This is a private code that select members of your firm can use to take administrative actions related to your GEMS Cloud subscription, including inviting new users, deactivating existing users, and viewing your firm's cloud usage.

If your connection with GEMS Cloud is inactive for 15 minutes, the cloud returns to the Administrator, saving your file to your local drive. If the connection remains inactive for an additional 2 minutes, GEMS Cloud terminates your session and vacates your seat to make it available to others. If you are logged out due to inactivity, it may take a short time for the seat to reset.

§1.02 Licensing Cloud Seats and Selecting the Supervisor

A GEMS Cloud license is linked to a single office. If your firm licenses GEMS for more than one location, each location should have a separate cloud license.

- ▶ When you access GEMS Cloud, you will only be able to access those state modules licensed by the office that is linked to the cloud account.

The firm Supervisor must invite firm members to join the cloud. Each invitee will receive an email which contains a link to permit that person to create their own login ID and password. The Supervisor will also be able to deactivate a user's account in the event a person leaves the firm.

Licensing Seats With Initial GEMS License

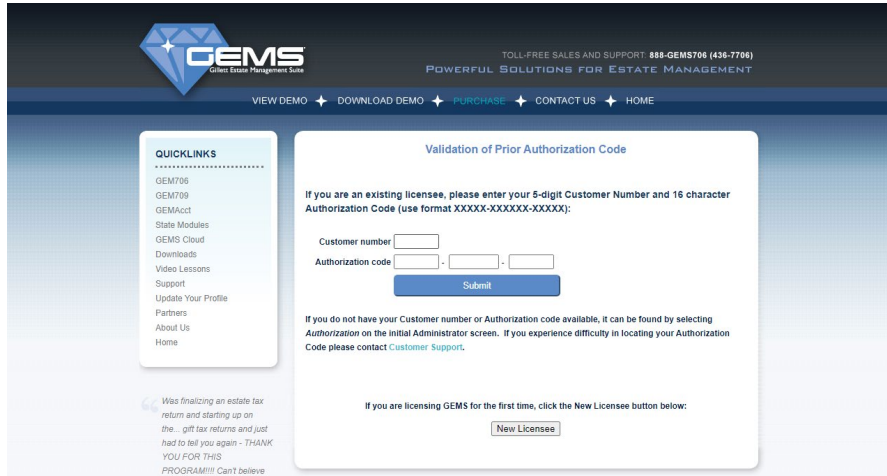
You can purchase cloud seats when you initially license GEMS. If you click Purchase on the upper menu bar on www.GillettPublishing.com, GEMS displays licensing information and pricing:

The screenshot displays the GEMS website interface. At the top, the GEMS logo is on the left, and the text "TOLL-FREE SALES AND SUPPORT: 888-GEM5706 (436-7764) POWERFUL SOLUTIONS FOR ESTATE MANAGEMENT" is on the right. Below this is a navigation bar with links: VIEW DEMO, DOWNLOAD DEMO, PURCHASE, CONTACT US, and HOME. The main content area is divided into several sections:

- QUICKLINKS:** A vertical list of links including GEM706, GEM709, GEMAcct, State Modules, GEMS Cloud, Downloads, Video Lessons, Support, Update Your Profile, Partners, About Us, and Home.
- Image:** A photograph of two hands shaking over a desk with a calculator and a pen.
- Licensing:** Text explaining that GEMS (GEM706, GEM709, and GEMAcct) is licensed as a "suite" and its components are not sold separately. It details the license fee for single user (\$1,595) and multiple users (\$2,595) versions, and notes that licenses are issued by yearly edition.
- State Modules Pricing:** Text stating that state modules are available as an add-on purchase to GEMS. It specifies a license fee of \$500 for a single user and \$750 for multiple users, and notes that multiple users licenses require purchasing the multiple users license for state modules.
- GEMS Cloud Pricing:** Text explaining that GEMS Cloud seats are available as an add-on purchase to GEMS. It states that purchasing GEMS Cloud grants the ability to use all previously purchased GEMS licenses in the cloud, and that GEMS Cloud seats are priced at \$50.00 per seat per month.

§1.02 Licensing Cloud Seats and Selecting the Supervisor

Click Continue, and GEMS displays the following:



Click New Licensee at the bottom of the window:



In the top portion, select the annual edition you desire to license and any state modules. At the bottom, indicate the number of seats you want to purchase. If you are licensing the single user version, you can only purchase one seat. For the multiple user version, you can purchase an unlimited number of seats, remembering that everyone who occupies a seat must work in the licensed office.

The price of seat licenses is displayed at the bottom of the window. You must license a seat for 6 months. When you initially license a seat, the first month's cost is prorated since all seat licenses expire at the end of a month.

- Gillett Publishing does not mark up the cost of seats.

After entering the relevant information, click Purchase and complete the billing information:

The screenshot shows the GEMS website's Billing Information form. The header includes the GEMS logo, contact information (888-GEMS706), and navigation links (VIEW DEMO, DOWNLOAD DEMO, PURCHASE, CONTACT US, HOME). A sidebar on the left lists quicklinks such as GEM706, GEM709, GEMAcct, State Modules, GEMS Cloud, Downloads, Video Lessons, Support, Update Your Profile, Partners, About Us, and Home. The main form area is titled "Billing Information" and contains the following fields:

- * First Name: Mark
- * Last Name: Graves
- Firm: Graves and Gillett
- * Street 1: 406 Jamestown Road
- Street 2: [empty]
- * City: Williamsburg
- * State: Virginia
- * Zip Code: 23185
- * Telephone Number: 757 321 2341
- * Email Address: graves@gg.com

Below the form is a "Submit Form" button and a note: "Fields marked with an asterisk (*) are required." A testimonial from Seattle, WA is visible on the left side of the form area.

You can enter multiple email addresses.

- ▶ Important update information is sent to the email recipients. It is important to identify at least one professional who will be using GEMS.
- ▶ Each person you identify will receive the Cloud Supervisor code.

After agreeing to the license agreement, GEMS displays a summary of the transaction. Enter your credit card information and click Submit to complete the transaction.

The identified individuals will receive two emails. The first is a receipt. The second entitled "Your GEMS Purchase" will include important information about your license, including your 5-digit customer identification code and your 16-digit authorization code. It also includes installation instructions.

If you have purchased seats for GEMS Cloud, you will receive an additional email entitled "Your Cloud Environment is Ready" after GEMS completes the necessary work to setup your cloud account.

Adding Seats to Existing GEMS License

To license cloud seats if you have an existing GEMS license, the process is generally the same as outlined above. You will advance to the Validation of Prior Authorization Code window:

The screenshot shows the GEMS website's Validation of Prior Authorization Code form. The header and sidebar are identical to the previous screenshot. The main form area is titled "Validation of Prior Authorization Code" and contains the following text and fields:

If you are an existing licensee, please enter your 5-digit Customer Number and 16 character Authorization Code (use format XXXXX-XXXXXX-XXXXXX):

Customer number: [input field]

Authorization code: [input field] - [input field] - [input field]

[Submit button]

If you do not have your Customer number or Authorization code available, it can be found by selecting Authorization on the Initial Administrator screen. If you experience difficulty in locating your Authorization Code please contact Customer Support.

If you are licensing GEMS for the first time, click the New Licensee button below:

[New Licensee button]

A testimonial from The CPA Journal is visible on the left side of the form area.

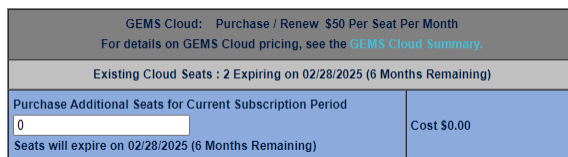
If your firm has already licensed GEMS and now wishes to license cloud seats, enter your 5-digit customer number and 16-digit authorization code which you can find by clicking About on the GEMS initial Administrator screen. GEMS displays the following:



At the bottom of the window, enter the number of seats that you desire to license. The price for each seat is displayed at the bottom of the screen. Note that you must license a seat for 6 months. The additional seats expire at the same time as original seats. As a result, the initial period for the additional seats may be less than 6 months.

► Gillett Publishing does not mark up the cost of seats.

If you have already licensed seats, GEMS displays details with respect to your current seats on the above window:



Additional seats expire at the same time as your existing seats. As a result, their initial term will be less than 6 months, and their cost reflects the shorter period. After selecting the number of additional seats, Click purchase and complete the screens that follow.

§1.03 Using Your Cloud Supervisor Code

When you purchase your cloud seats, those individuals identified to receive GEMS emails will receive an email entitled “Your GEMS Cloud Environment is Ready!”

Congratulations! Your GEMS Cloud environment is ready to use! The Cloud Supervisor must invite users to join your GEMS Cloud subscription through the [Cloud Supervisor portal](#) on GillettPublishing.com. This portal permits the designated Cloud Supervisor to invite new users, deactivate existing users, and view your firm's GEMS Cloud usage.

To access your Cloud Supervisor portal you must enter the following information:

Customer Number 12345
Cloud Supervisor Code **EAE44-EA432K-51C6N**

You should only share your code with authorized administrators from your firm.

If you have any comments or questions regarding installation or operation of GEMS Cloud, please call customer support at 888-GEMS706 (436-7706).

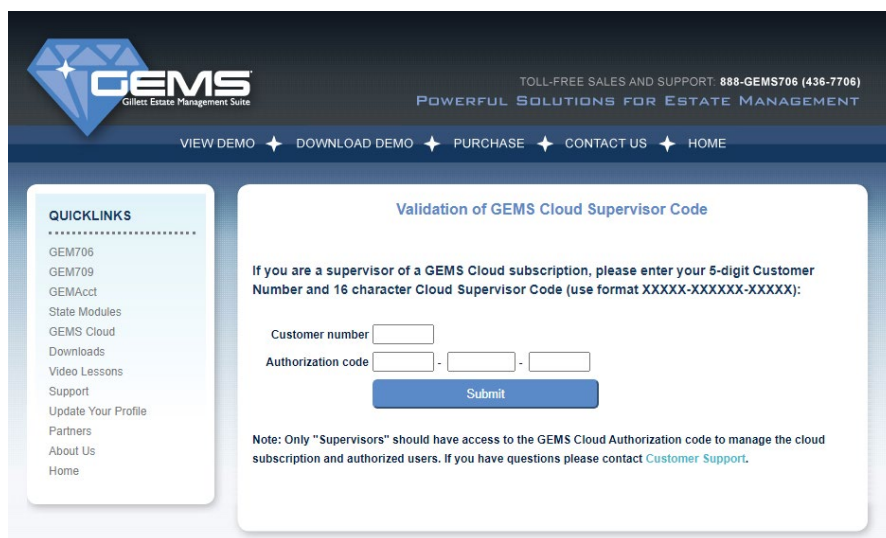
Again, thanks for your business.

Note that the above email includes your customer number and your Cloud Supervisor code.

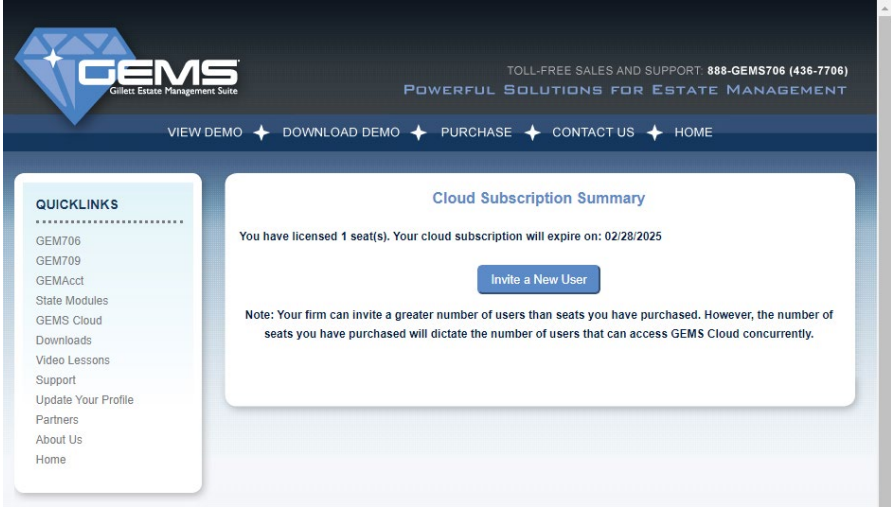
- ▶ You must retain your Supervisor code. If you lose or forget your Cloud Supervisor code, you will need to contact GEMS technical support.

As the email indicates, you can share the code with other administrators in your firm if you would like more than one individual to act as Supervisor. Also, you can select someone other than the email recipients as the Supervisor. In this case, forward the email so that person can create the Supervisor account.

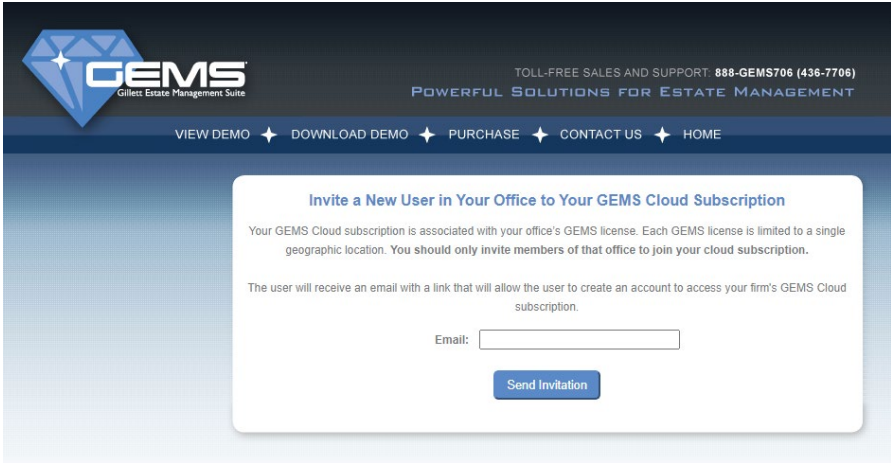
When you click the “Cloud Supervisor portal” link in the above email, GEMS displays the following:



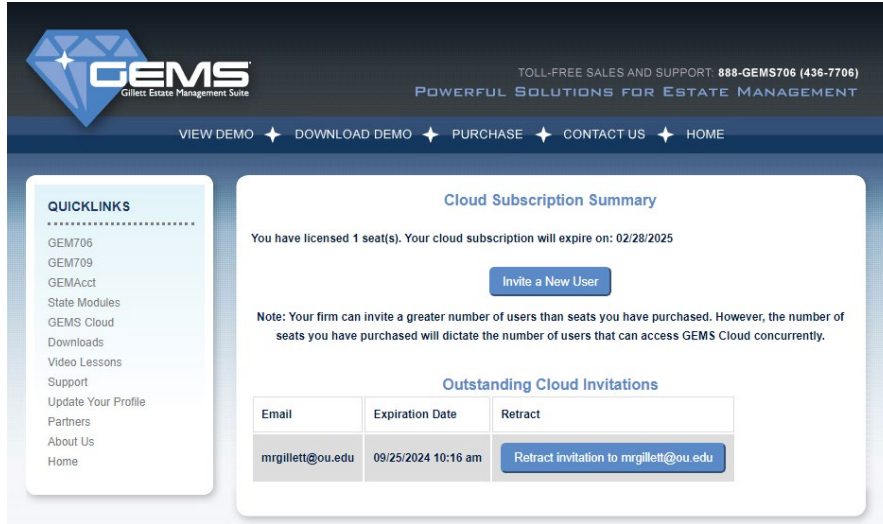
After you enter your customer number and your newly assigned Supervisor authorization code, GEMS permits you to invite your first user:



As Supervisor, you can invite multiple members of your firm to access the cloud. However, the number that can access GEMS Cloud concurrently is limited to the number of seats that you have purchased. When you click the link in the above window, GEMS asks for the user's email address:



After inviting the first user, GEMS confirms the invitation and permits you to access the Cloud Administrator:



For a discussion on how to access the Cloud Administrator and the Supervisor’s responsibilities, see §1.05.

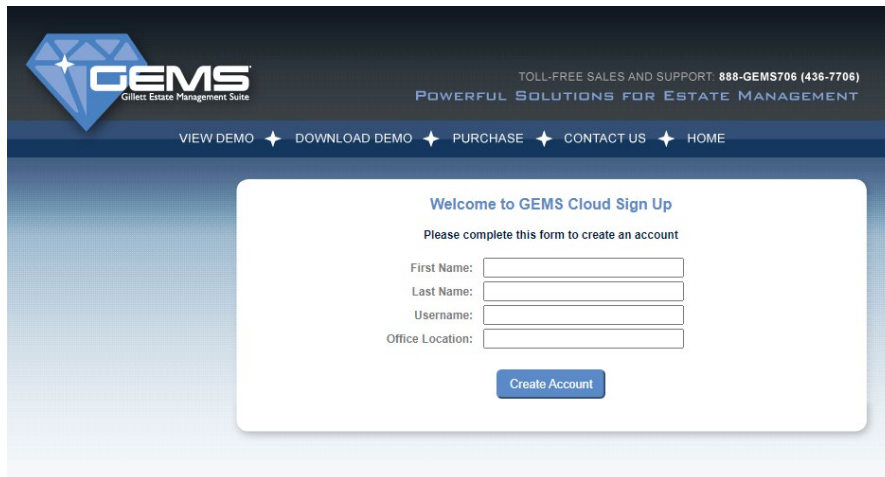
§1.04 Creating User Accounts

When the Cloud Supervisor invites an individual to join the cloud, that person will receive an email like the following:

You have been invited to join your firm's GEMS Cloud subscription. To start using GEMS Cloud, accept the invitation and create your account by [clicking this link!](#)

If you have any questions regarding installation or operation of GEMS Cloud, please call customer support at 888-GEMS706 (436-7706).

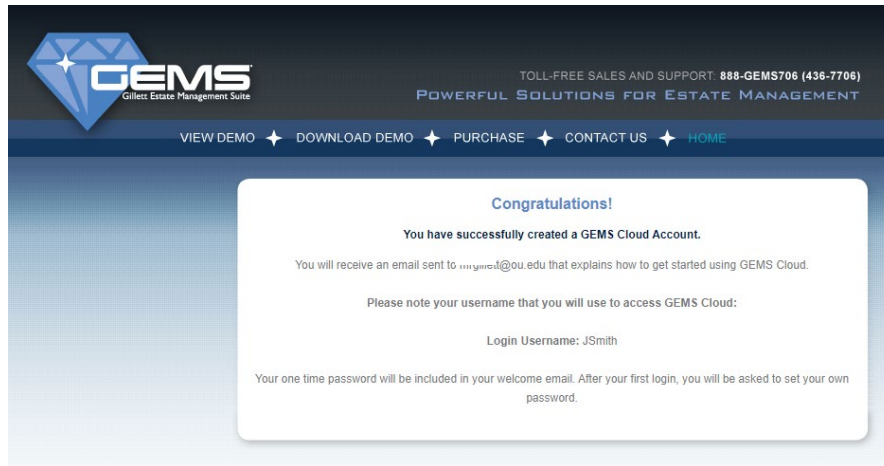
When you click the embedded link, GEMS displays the following:



To access GEMS Cloud, you must enter your username and password. You must also enter your office location.

- ▶ A GEMS license is limited to a single geographic location, and you must have a separate license for each office that accesses GEMS. If your firm licenses GEMS Cloud, only professionals in the licensed office are authorized to access the cloud application.

GEMS notifies you that you have successfully created a GEMS Cloud user account and displays your username:



The user will receive a final email entitled “Your GEMS Cloud Account is Ready.”

Hooray! Your GEMS Cloud Account has been successfully created. To access GEMS Cloud, please follow these steps:

1. Download and install the [GEMS Cloud client](#).
2. Open the newly installed GEMS Cloud shortcut on your desktop.
3. Enter your username and initial, one time password. See below.
4. Set and remember a new, more permanent password for longer term use

Your username is: JSmith

Your initial one time password is: rZmzKKbEc2J2

Please Note: The following security requirements need to be met by your new password:

- Cannot be the same as a previously used password
- Must be at least 12 characters long
- Must not contain your username or parts of your full name that exceed two consecutive characters
- Must contain characters from three of the following four categories:
 - English uppercase characters (A through Z)
 - English lowercase characters (a through z)
 - Base 10 digits (0 through 9)
 - Non-alphanumeric characters (for example: !, \$, #, %,)

If you have any comments or questions regarding installation or operation of GEMS Cloud, please call customer support at 888-GEMS706 (436-7706).

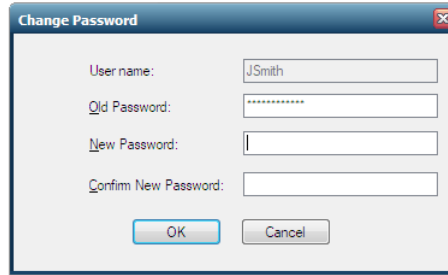
This email contains the username and a temporary password. You will be required to change your password when you first access the cloud. The password requirements are listed at the bottom of the email.

- Note that the password must be at least 12 character long. Your password should be strong since it secures your access to GEMS Cloud.

Each user must install the GEMS Cloud client. In that process, GEMS creates a shortcut on your desktop to GEMS Cloud which is easily distinguishable from the shortcut to your local installation:



When you launch GEMS Cloud, you must enter your username and temporary password. You will then be asked to change your password:



A dialog box titled "Change Password" with a close button in the top right corner. It contains four input fields: "User name:" with "JSmith" entered, "Old Password:" with asterisks, "New Password:" which is empty, and "Confirm New Password:" which is empty. At the bottom are "OK" and "Cancel" buttons.

Your password must meet the following requirements:

- Cannot be the same as a previously used password
- Must be at least 12 characters long
- Must not contain your username or parts of your full name that exceed two consecutive characters
- Must contain characters from three of the following four categories:
 - English uppercase characters (A through Z)
 - English lowercase characters (a through z)
 - Numbers from 0 through 9
 - Non-alphanumeric characters (for example: !, \$, #, %)

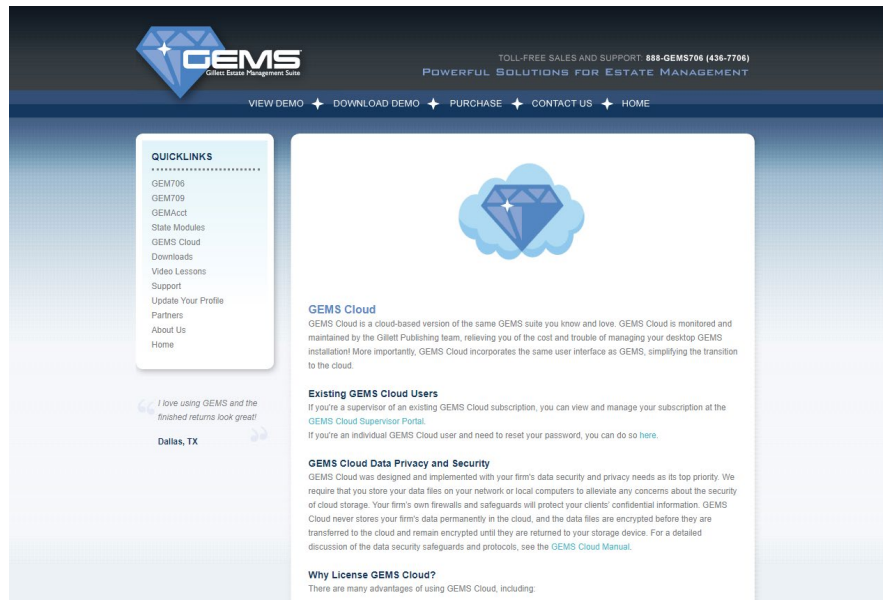
Note that you can elect to remember the username and password.

After you click OK, GEMS advances to the cloud Administrator. See **§1.05**.

§1.05 Cloud Supervisor

To increase the security of your cloud installation, you should only share the Cloud Supervisor code with firm members authorized to take administrative actions such as inviting new users. When you first license cloud seats, the firm members identified as email recipients for your firm’s GEMS account will receive an email entitled “Your GEMS Cloud Environment is Ready!” That email contains the supervisor password. To log into the Supervisor account, you must enter your 5-digit customer ID and 16-digit Supervisor password, both of which are included in the introductory email.

There are two ways to access the Cloud Supervisor portal. If you advance to www.GillettPublishing.com and click GEMS Cloud in the left menu bar, GEMS displays the following:



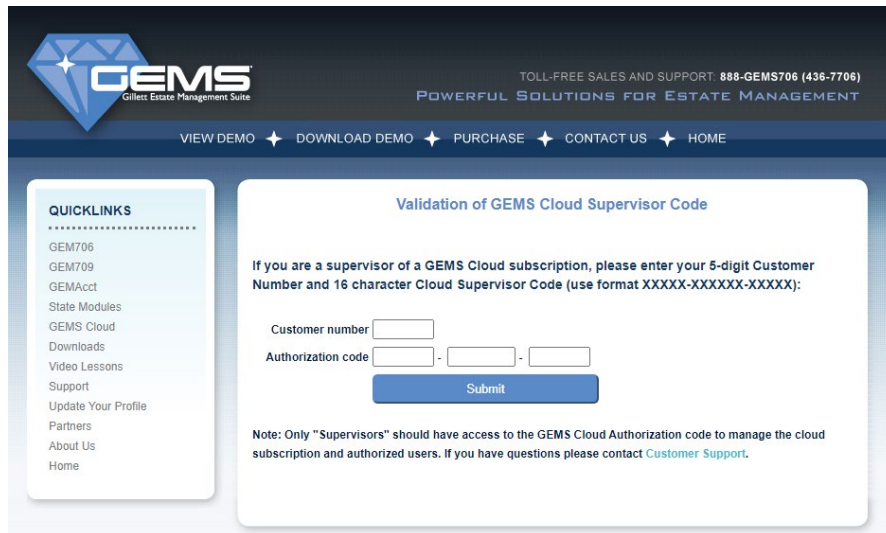
In the paragraph entitled “Existing GEMS Cloud Users,” there is a link to Supervisor portal.

You can also access the portal from the GEMS Cloud Administrator window:

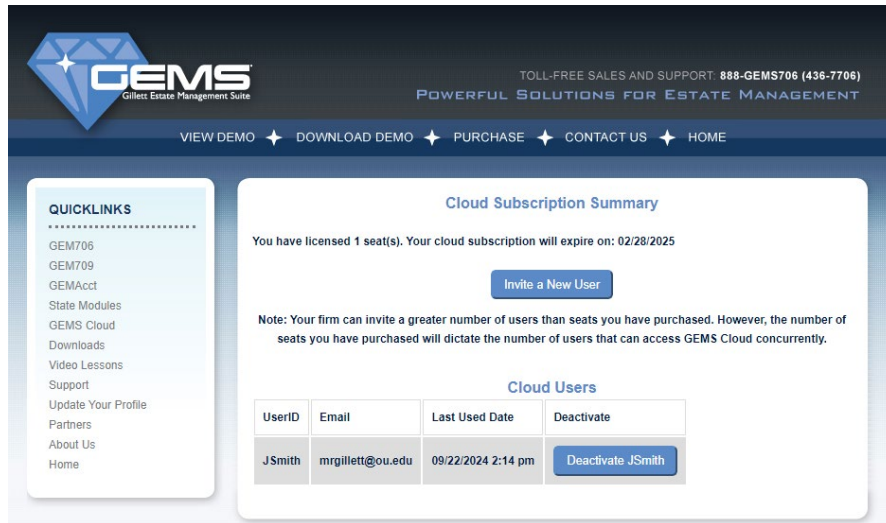


Click Cloud Supervisor in the top menu bar.

In both instances, you will then be asked to enter you customer number and Cloud Supervisor authorization code:



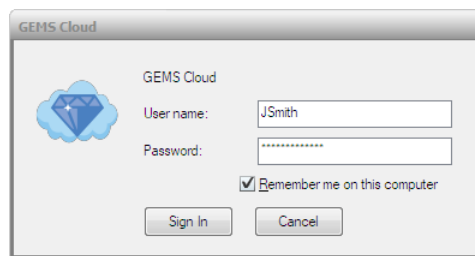
After logging in, GEMS displays information with respect to user account that you have already created:



You can invite new users, deactivate current users, and withdraw invitations if they have not yet been accepted.

§1.06 Launching GEMS Cloud

After you create your cloud user account and run the installation script (see §1.04), GEMS creates a shortcut on your desktop that launches GEMS Cloud. When you double click that shortcut, GEMS displays the login screen:



You must first enter your username and individual password. See §1.04. GEMS then displays the Cloud Administrator:



The icon in the top left permits you to distinguish the Cloud Administrator from the Administrator on your local installation. The functionality remains the same.

You will continue to store your data files on your network or local computers to eliminate concerns about the security of cloud storage. This can include file sharing devices such as Dropbox. Your firm's own firewalls and safeguards will protect your clients' confidential information.

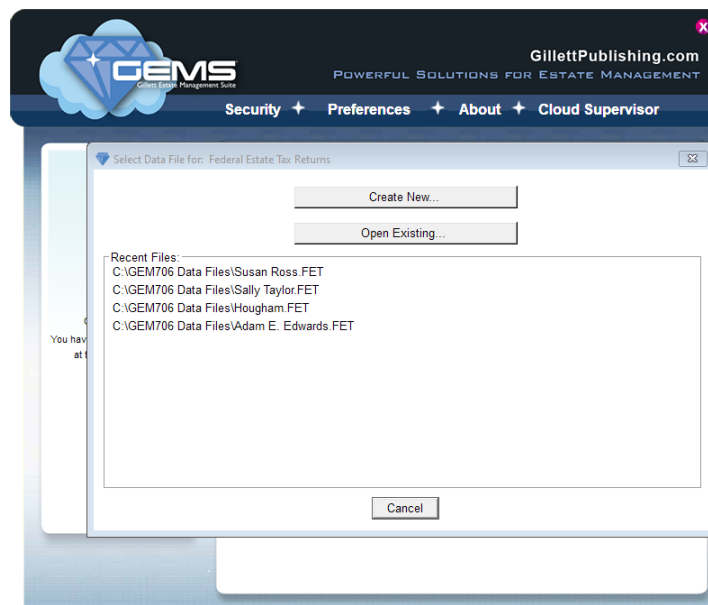
- ▶ By maintaining your files on your local computer, GEMS Cloud helps to ensure that you don't have two copies of the same data file and that you are always editing the most recent version.

When you edit a data file, GEMS Cloud uploads the file to the cloud to eliminate the need to regularly communicate with your local computer. When you are finished, the file is returned to your local drive. GoGlobal uses AES symmetric encryption to encrypt the file while uploading and downloading the file from your local computer to GEMS Cloud. For more information with respect to GoGlobal's security protocols, see <https://www.graphon.com/blog/zero-trust>. For more information with respect to AES security protocols, see https://en.wikipedia.org/wiki/Advanced_Encryption_Standard. Once GEMS Cloud obtains access to the file, it immediately encrypts the data using the same encryption method, and the file remains encrypted while it is open in GEMS Cloud. In addition, Microsoft Azure, the cloud host, adds an additional layer of encryption while hosting GEMS. See <https://learn.microsoft.com/en-us/azure/virtual-machines/disk-encryption-overview>.

- ▶ GEMS Cloud has access to your data file only while you edit that file and never retains a copy in the cloud when you exit. During uploading, editing, and downloading, your file remains encrypted.

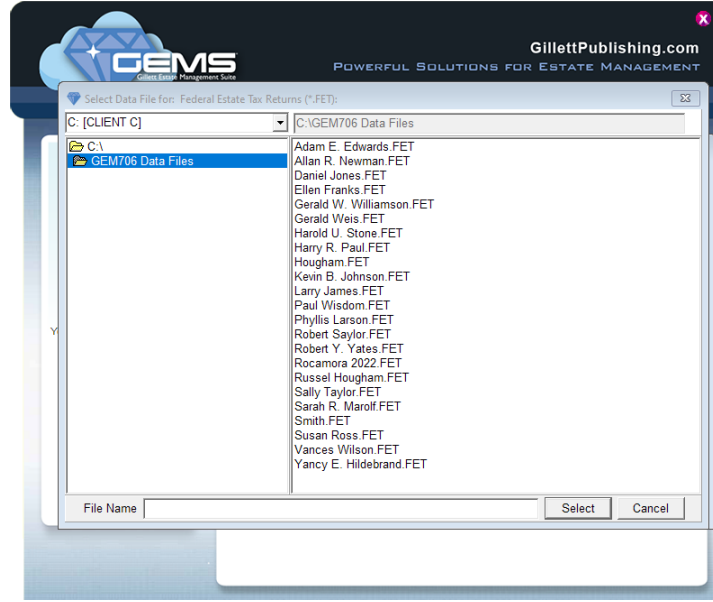
To further secure your data, GEMS maintains separate executable codes in the cloud for each firm. In other words, every firm has its own cloud environment.

To edit or create a data file, click the corresponding module, and GEMS Cloud displays the recent files you have accessed from the cloud:



To select another file, click Open Existing:

§1.07 Importing Macros, Preparers, and Cover Letters



You can browse to any folder that you can access from your local computer.

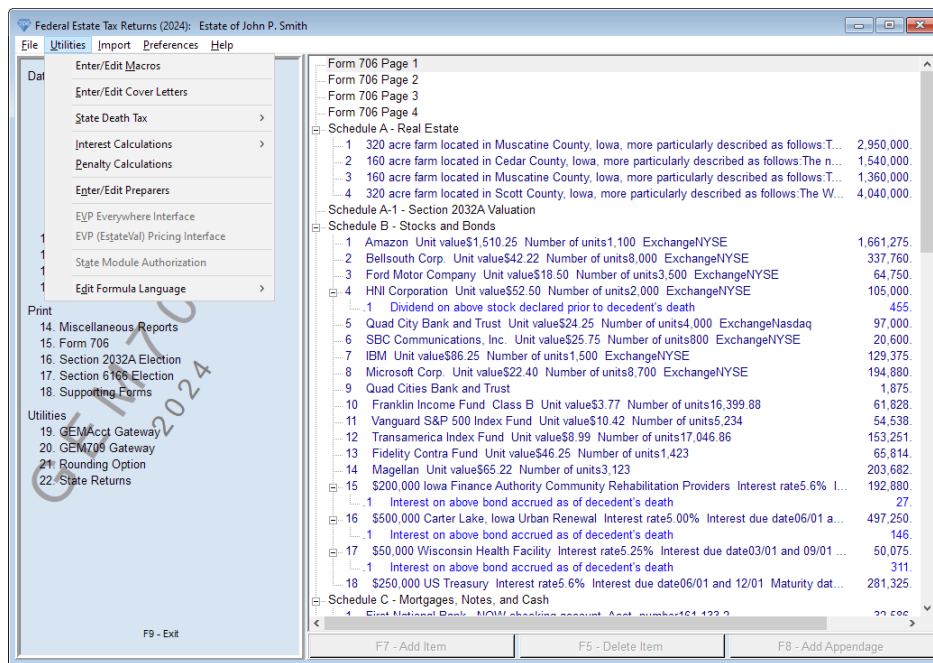
- ▶ The operation and program flow of GEMS Cloud is the same as its locally installed counterpart.

Even if your firm has multiple seats, a single user cannot launch a second GEMS Cloud installation if that user already has one open. However, that user could log in a second time with different credentials.

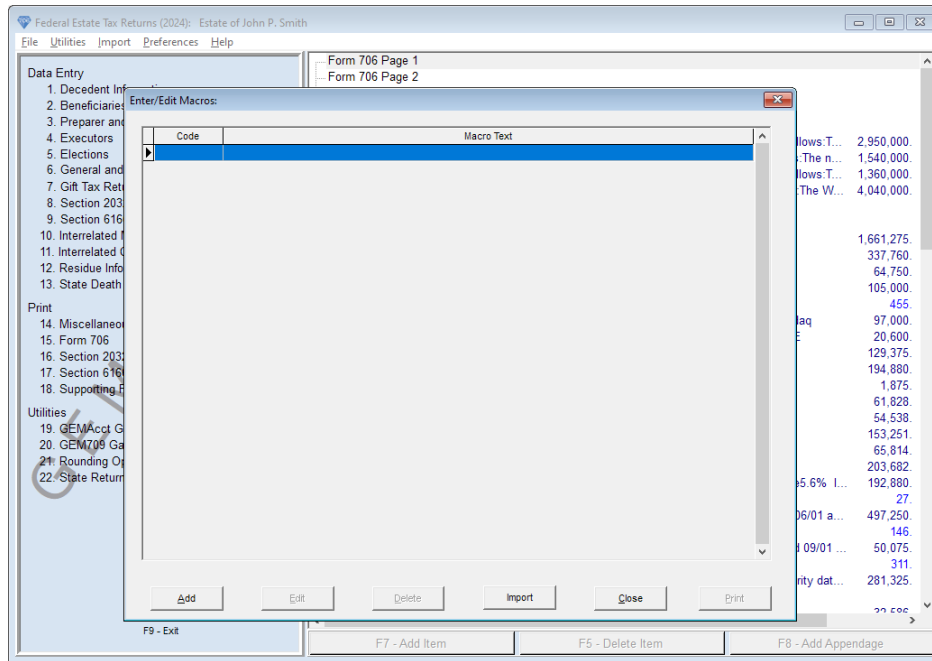
§1.07 Importing Macros, Preparers, and Cover Letters

As explained in §1.01, GEMS maintains separate executable programs in the cloud for each firm. In other words, every firm has its own cloud environment. Furthermore, your cloud installation is distinct from your local installation. In other words, the macros, preparers, and cover letters that you may have created in your local installation are not automatically available to GEMS Cloud. You can, however, import that information.

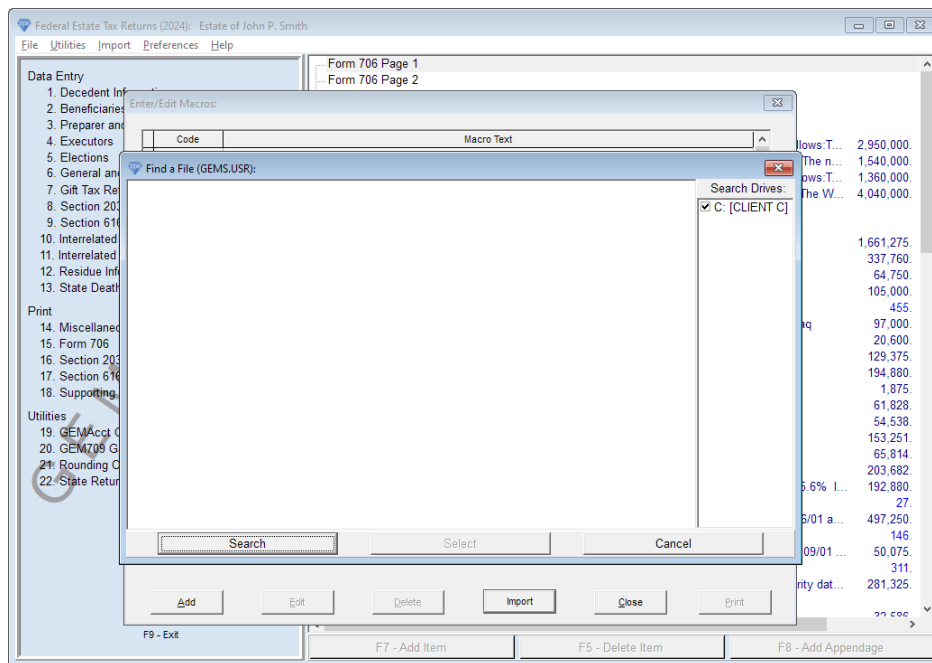
After you launch GEMS Cloud and access a data file, click Utilities in the top menu bar:



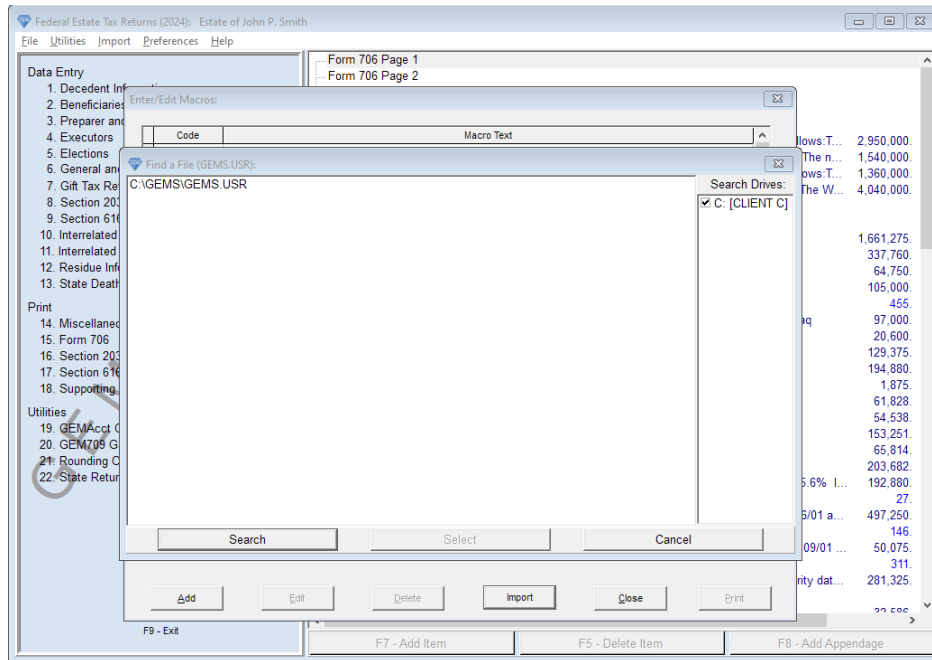
If you click Enter/Edit Macros, GEMS Cloud displays the following:



If you have created macros in your local installation, you will have to import them to GEMS Cloud. Click Import at the bottom of the window:



In the right portion of the window, GEMS displays the drives accessible from your computer. After you select the drive on which you installed GEMS locally, click Search at the bottom of the window:



The macro information is stored in a file named GEMS.USR. When GEMS locates that file on your local drive, you can stop the search and double click on the file to import the macros to the cloud. Cover letters and preparers can be imported in a similar manner.

You also must remember that new information entered in the cloud (or locally) is not automatically copied to the other installation. Thus, if you enter a new preparer in the local installation, you will have to also enter that preparer in the cloud or again import the preparer file from your local installation to the cloud.

- ▶ Your local installation of GEMS does not have access to your cloud installation. As a result, you cannot copy macros, cover letters, and preparers from the cloud to your local computer.
- ▶ If you have made changes to the default election language in GEM706 and GEM709, you must manually make those changes in your cloud installation.

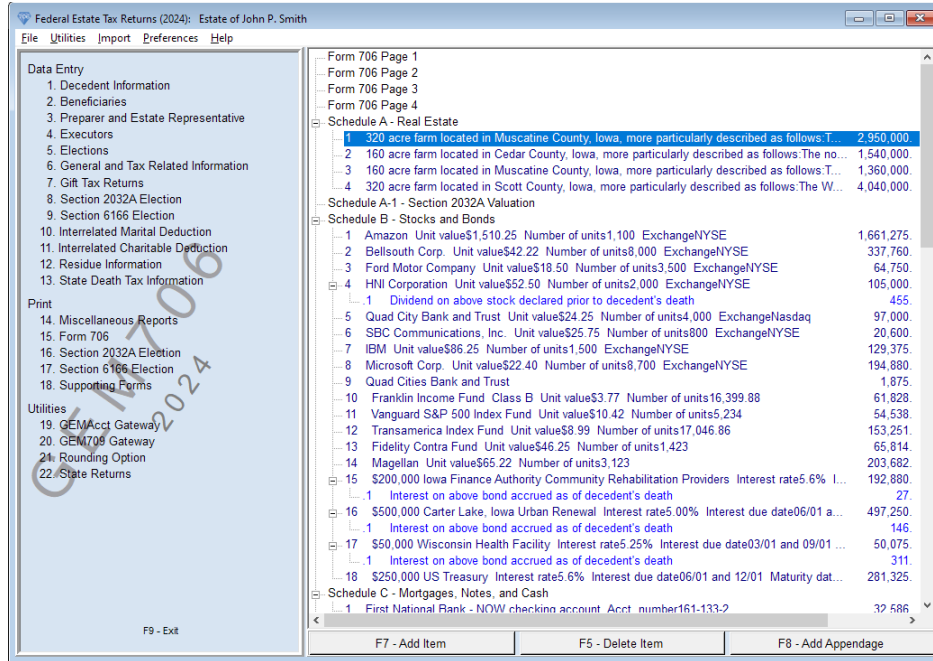
§1.08 Saving Files to Your Local Drive

If GEMS is installed locally, it automatically saves your work periodically and when you exit the file. In the event the program's operation is interrupted for any reason, your data file will include your most recent changes.

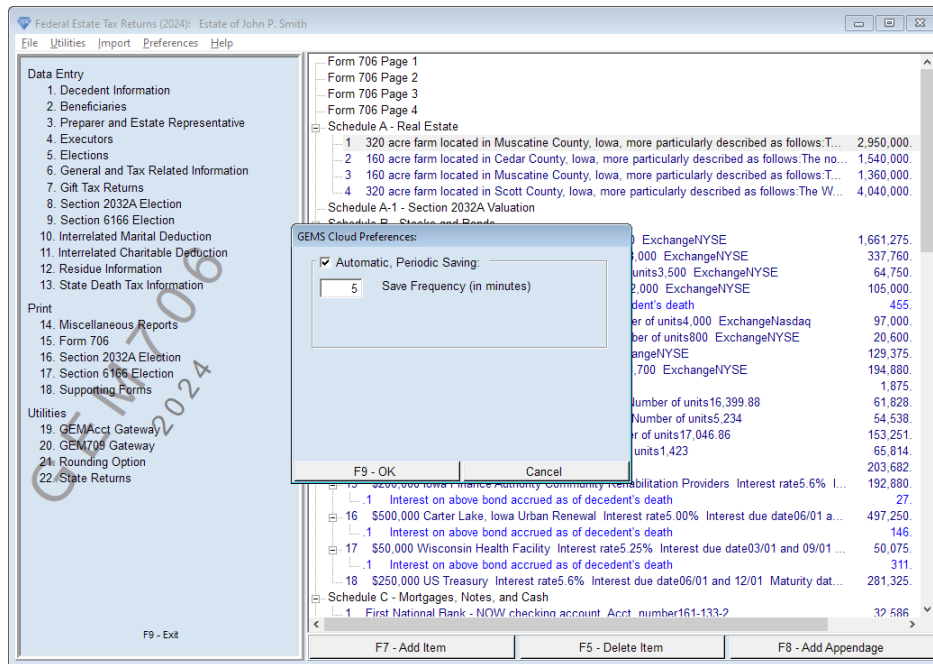
As explained in §1.01, you will continue to store your data files on your network or local computer. When you edit a data file, GEMS Cloud uploads the encrypted file to the cloud to eliminate the need to regularly communicate with your local computer. When you are finished, the updated file is returned to your local drive.

- ▶ Your local data file is updated only if you save your file.

There are two ways to save your data file to your local computer while you continue working on it. After you have launched GEMS Cloud and have accessed a data file, GEMS displays the Main Menu and schedule tree:

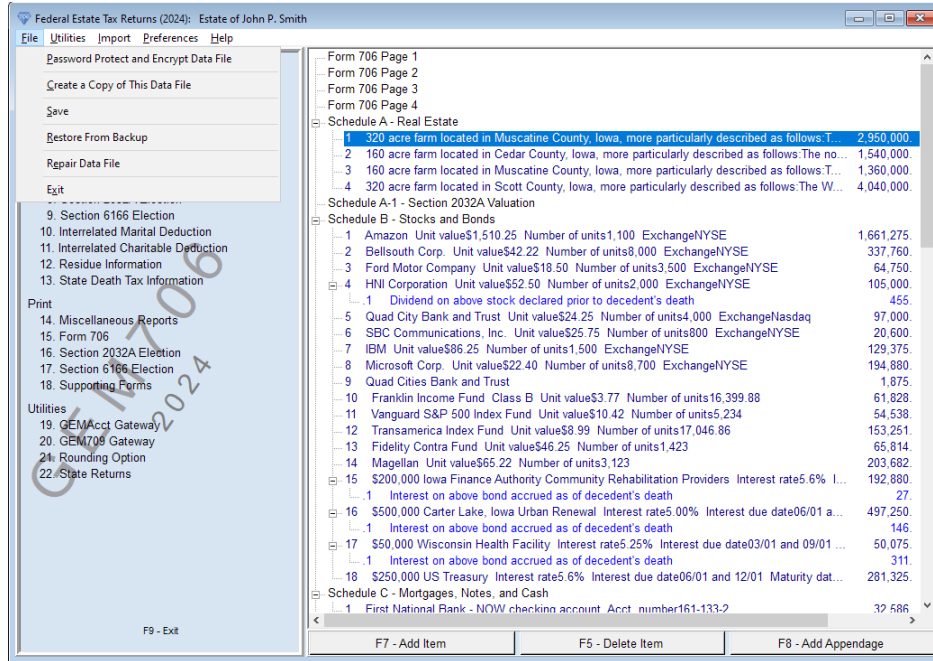


If you select Preferences in the top menu bar and then Cloud Preferences, GEMS Cloud displays the following:



You can enter the number of minutes between the automatic saving of the file to your local drive. Since this process only takes seconds, you should select a fairly short period. GEMS Cloud displays a message while it is saving.

You can also save your file manually. If you select File in the top menu bar, GEMS Cloud displays the following:



You can save the file to your local drive at any time by clicking Save.