CCH Axcess™ Portal

Welcome to CCH Axcess Portal 2014-3.5

This bulletin provides important information about the 2014-3.5 release of CCH Axcess Portal. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 6. Additional information is available on CCH Support Online.

New in this Release

Portal Integrated with Document – When Selecting Firm Users to Grant Access to a Portal, Display them in Alphabetical Order

Firm users are now listed in alphabetical order by last name when you are granting Portal access. This change makes it easier to locate firm users in the list. Previously, firm users were displayed in the order they were created.

Office Plug-in Credential Security

Office Plug-in credentials are now stored using stronger encryption to better protect data stored in Portal. As an added level of security, you must now opt in to have your password saved. The first time you open the Office applications after upgrading, you will be prompted to enter your login credentials. If you select the new Remember Password check box, you will not have to enter your credentials every time you use the plug-ins.

Handling When Browser Silverlight Plug-in is Disabled

Some versions of Google Chrome and Mozilla Firefox disable the Silverlight browser plug-in by default, but may provide options for re-enabling the plug-in. Users accessing Portal from Google Chrome may now see instructions to use Internet Explorer or Firefox to access the Silverlight version of Portal. Alternately, users can click on a provided link to be taken to the non-Silverlight Simplified Portal. Users accessing the Silverlight version of Portal from Mozilla Firefox will also receive a message with instructions. They can choose to enable the plug-in, to use Internet Explorer, or to click a link which will redirect them to the non-Silverlight Simplified Portal.

Portal Conversion Utility Improvements for Large Firms

The Portal Conversion Utility now saves client and staff linking selections as they are made. This change ensures that you do not have to restart the linking process if you exit the utility. In case of a user-initiated or unexpected closure of the application, when restarting the utility, you will be prompted to load previous links.

Technical Corrections

Portal Integrated with Document – Improved Service to Service Communications

Communications between Document and Portal have been improved. These changes will limit errors in Document that can result when Document cannot reach a Portal server.

Login Screen Mentioned Silverlight 4 instead of Current Version Silverlight 5

The Portal login screen now refers to Silverlight 5 instead of Silverlight 4.

Portal Conversion Utility did not Display the Notification for Subsequent Login Attempts

The notification alerting users that a conversion is in progress now displays for the duration of conversions from standalone to integrated mode. Previously, the notification only displayed the first time a user logged in during a conversion. On subsequent logins, users were not notified and were logged in and immediately logged out.

Portal Integrated with Document – Inactive Portal Created by the Batch Portal Creation Wizard Showing as Active

When using the Batch Portal Creation Wizard, inactive portals now properly display as inactive in the client profile.