

CCH Access™ Portal and CCH Client Access

Welcome to CCH Access Portal 2014-5.0 and CCH Client Access 2.0

This bulletin provides important information about the 2014-5.0 release of CCH Access Portal and CCH Client Access 2.0. 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

CCH Client Access v 2.0

As we announced at CCH Connections: User Conference 2015, this release includes a new Portal user experience for your clients and is the first phase in converting Portal away from Microsoft® Silverlight® technology to today's Web standard HTML5 technology. Using HTML5 technology, the new Portal interface will adapt to work on any modern operating system and Web browser on PCs, Macs®, tablets, and smartphones. Clients and firm users will have access to both the new CCH Client Access interface and the existing Silverlight® interface. If your firm would like its clients to use CCH Client Access, firm administrators can update your email notifications to refer to <https://www.clientaccess.com> instead of, or in addition to, the existing Portal URL (<https://portal.cchaccess.com>).

The following capabilities are included in this initial release:

- ◆ **Fresh New User Experience** – CCH Client Access provides clients with a familiar, yet current, look and feel. Its crisp, clean user interface adapts to fit any screen size and form factor. CCH Client Access works great for Mac® users or those accessing it from a smartphone or tablet device. If your firm uses Portal integrated with Document, you will continue to access Portal functionality from the Document smart client interface.
- ◆ **Mobile Access to Files Stored in Portal** – Since CCH Client Access was built using the latest Web technology, your clients can access files in Portal from their smartphones and tablets using an active Internet connection. CCH Client Access supports iPhones® and iPads® (but not iPad minis™) running iOS® 8 or iOS® 9 when accessing the site using the built-in Safari® Web browser. It also supports Android™-based phones and tablets running the following Android™ operating systems using the built-in Chrome™ Web browser: Kit Kat, Lollipop and Marshmallow.
- ◆ **Login Page and Home Page with Firm's Logo** – If you add your firm's logo in the Silverlight® interface, it will display on the CCH Client Access login page and home page when clients or staff login. To conserve screen space, the logo is not displayed on the Home page when accessed from smartphone devices. If your logo was set up prior to the 2014-5.0 release, it will automatically display in CCH Client Access. Logging in to CCH Client Access is much faster than logging in to CCH Access Portal as well, especially for users who have access to a large number of client portals.
- ◆ **Portal Selection** – Firm users and clients can select from one of the 25 most recently used portals or search for any other portal they have access to. If you only have access to a single portal, then that portal is selected automatically.
- ◆ **Announcements** – When your firm creates a new announcement for a portal in the Silverlight® interface, the announcement panel will slide into view when your clients select that Portal in CCH Client Access. A button on the Home page makes getting back to announcements easy without displaying them all the time.
- ◆ **Files and Folders** – CCH Client Access has a familiar File and Folder view similar to the Silverlight® interface. Files and folders display in a list with details including the filename, expiration date, date modified, modified by, and file size. An icon view is not currently planned. Recently added files are indicated with a green **New!** label above the icon. Simply tap or click a file to download or open it. You can sort by any column in ascending or descending order. Large file lists are loaded 40 files at a time, with unlimited scrolling.
- ◆ **Add Files** – You can add files to Portal by selecting the folder to upload to, and then clicking the Add Files button to browse and select the files to upload. Alternately, you can drag files from your computer to the portal folder.

- ◆ **Add Files On-the-Go** – When accessing CCH Client Access from a mobile device such as a smartphone or tablet, you can use the device's built-in camera to capture single-page documents, assign a filename, and then upload the image to Portal.

Microsoft® Office Plug-in Credential Security

Microsoft® 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 Microsoft® Office applications after upgrading the plug-ins, 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.

Microsoft® Windows® 10 Compatibility

Portal and CCH Client Access are both compatible with Windows® 10, when running in a supported Web browser. The Microsoft Edge browser does not currently support browser plug-ins like Silverlight®. Microsoft Edge can be used to access CCH Client Access; however, the drag-and-drop feature is not yet supported for adding files to Portal using the Edge browser. The drag-and-drop feature works in Google Chrome™ and other browsers on Windows® 10.

Handling When Silverlight® Plug-in is Disabled in the Web Browser

Some Web browsers disable the Microsoft® Silverlight® plug-in by default, but provide options for re-enabling the plug-in. If you are accessing Portal from Chrome™, you will now see instructions to use Microsoft® Internet Explorer® or Mozilla® Firefox®, or you can click a link to the non-Silverlight® interface. Alternately, you can access the new CCH Client Access URL to upload or download files to 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, you will be prompted to load previous links when you restart the utility.

Integration with the CCH Access™ Practice Thin Client

You can print invoices from the new Practice thin client to the standalone version of Portal. New integration screens have been developed in HTML5 to reflect the same look and feel as the Practice user interface. You can create a new portal on-the-fly if one does not already exist for the client you are invoicing.

Fixed in this Release

Various Performance and Scalability Improvements

A number of performance and scalability improvements have been made with this release.