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Release Notes

Release 2015-4.1
July 2016

CCH Axcess™ Portal/CCH Client Axcess

Welcome to CCH Axcess Portal and CCH Client Axcess 2015-4.1

This bulletin provides important information about the 2015-4.1 release of Portal and Client Axcess. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release: Portal Microsoft® Silverlight® Interface

New Smart Tag to Include the Client Axcess URL in Portal Email Notifications

Your firm can now choose whether to display the URL for Portal's Microsoft® Silverlight® interface or the new Client Axcess interface in email notifications. When editing email notifications, the <Server Name> smart tag is now shown as <Silverlight Server Name>, and a new <Client Axcess Server Name> smart tag has been added. Firms that want to use Client Axcess exclusively for their clients can edit all their existing email notifications to use the new <Client Axcess Server Name> smart tag. There are four email notifications that are system-generated and not configurable by the firm:

- Account Creation Conflict
- Welcome to Portal (on Account Creation)
- Reset Password Link (in Security Alert notification)
- URL to change password (in User Forgotten Password notification)

For these four events, both URLs will be included in email notifications.

New in this Release: CCH Client Axcess Interface

The CCH Client Axcess interface has been updated for desktops, tablets, and smartphones when accessed from a Web browser. The native iOS and Android apps have not yet been updated to include the changes listed below. We are continuing our focus in this release on the client user experience through the Web browser.

As a reminder, the URL for Client Axcess is https://www.clientaxcess.com. Your clients can log in to this interface using their existing Portal credentials. We recommend the Client Axcess interface for clients who access Portal from a Macintosh® computer or who use the Google Chrome Web browser.

Android and iOS devices can also be used to access Portal content through the Client Axcess Web interface. Staff members of firms using the standalone version of Portal (i.e., not integrated with CCH Axcess™ Document) can also log in to Client Axcess using their existing Portal credentials. However, firm administration features have not yet been added to Client Axcess. Staff members of firms using Portal integrated with Document can continue to access Portal functionality through the Document smart client interface, while their clients can use the new Client Axcess interface.

Create and Manage Portal Users
Portal admins and firm staff with proper permissions can now create and manage portal users in the Client Axcess user interface on desktop and tablet devices. To simplify setup, after selecting the portal you want to work with, you can easily flip between the Documents view and the Manage Users view. You no longer need to leave the portal you are working in to go to a separate admin area to create or manage portal users. A handy search field lets you search long lists of users by first or last name or email address. You can perform the following actions from the Manage Portal Users screen:

- **Add User** – Create a new portal user within the selected client portal.
- **Edit** – Make changes to an existing portal user's profile including email address, default security role, or contact information. Portal admins can also grant the portal user access to other client portals for which they are the portal administrator.
- **More […] > Delete** – Allows the portal admin to delete the user.
- **More […] > Reset Password** – Resets the password for the portal user and sends a new temporary password via email to the user's login ID email address.
- **More […] > Resend Welcome Email** – Resends a client user's welcome email.

File Upload Queue
Files selected for upload are placed in a new File Upload Queue until the user is ready to start the upload process. When all files have been added to the queue, click the **Upload All** button to start the upload process and send the email notification. Files uploaded in error can be removed from the queue prior to upload, or the upload can be canceled if it already in progress. The Upload Queue can be closed and reopened so you can select additional files and upload them all at the same time. An Upload Queue icon and badge display in the notification area in the upper-right corner of the screen to indicate the number of files in the Upload Queue. The File Upload Queue uploads files one at a time to the Portal server.

Add Files Using Drag and Drop
You can now add files to Portal by dragging and dropping them on the Client Axcess interface. Drop files on any folder in the tree view or in the Files & Folders list to upload files to that folder. You can also drop the files on the file list to upload the files to the folder you are currently viewing.

Single File and Batch File Actions
A new file action bar has been added above the file grid to support common file actions such as uploading and downloading files. You can check the box in front of one or more files, and the applicable file action buttons display above the file grid. Less frequently used actions are available by clicking the More Actions menu […] button. The following file actions are available with this release:

- **Upload** – Displays the File Open dialog, so that you can select one or more files to upload to the selected folder. You can upload one or more files at a time. When multiple files are uploaded using the Upload All button, a single email notification is sent to notify the recipient that multiple files were uploaded.
- **Download** – Download one or more selected files to your computer or device. Please note that you will need to disable the pop-up blocker in Safari settings on iOS devices to view or download files.
- **More Actions […] > Check Out** – Checks a single file out for editing. Other users cannot edit the file while it is checked out, but they can download a read-only copy of the file with proper permissions. This option is not available if multiple files are selected. This option is only available on desktops or Android Tablets. iOS devices do not currently support this option.
- **More Actions […] > Check In** – Checks in changes for a single checked out file and makes the updated file available for other users to edit. This option is not available if multiple files are selected. This option is only available on desktops or Android Tablets. iOS devices do not currently support this option.
- **More Actions […] > Cancel Check Out** – Cancels a single checked out file without saving changes to the file and makes the original file available for other users to edit. This option is not available if multiple files are selected. This option is only available on desktops or Android Tablets. iOS devices do not currently support this option.

- **More Actions […] > Delete/Request for Delete** – Clients can now delete files that they have uploaded to the standalone version of Portal. This feature is useful when a client accidentally uploads the wrong file. For files uploaded by other users, clients can request that the firm delete the file. An email notification is sent to the firm requesting the file be deleted. Firm staff with proper permissions can also delete files in Client Axcess. When using Portal integrated with Document, clients must request the firm to delete the file since it also resides in Document.

  To use this feature, select the check box for one or more files and then select the **More Actions […]** button. Depending on who uploaded the file, you will see either an option to Delete or Request for Delete. Deleted files are moved to the recycle bin in Portal so that the firm administrator can recover the deleted file if necessary.

More Streamlined User Interface
Based on early user testing, the following user interface changes have been made in this release:

- The portal selection has been moved to the blue bar on the left side of the screen to offer a more consistent experience on desktop, tablet, and mobile devices.

- After logging in, you are prompted to select a portal if you have access to multiple portals. If you only have access to one portal, you are automatically logged in to that portal.

- The Announcements button has been changed to a bell-shaped icon in the top-right corner of the screen. New announcements added by the firm from the Silverlight® interface automatically display the next time your clients log into their portals.

- The Add Files button has been renamed “Upload” on desktop and tablet devices, and now is located on the left side of the Files and Folders grid with the file action buttons on desktop devices. On smartphone devices, a floating “+” button displays near the bottom-right corner of the screen, where it is easier to reach when using the device one-handed.

Fixed in this Release

Integrated Portal - EULA Acceptance List
The EULA Acceptance List now displays the user's name. The published EULA now displays for all users.

Integrated Portal - Errors Received when Creating or Deleting Folder Templates
Creating or deleting folder templates with a large number of folders no longer results in an error.