Wolters Kluwer

CCH Axcess™ Portal/CCH Client Axcess

Welcome to CCH Axcess Portal 2016-3.4/CCH Client Axcess 2.0

This bulletin provides important information about the 2016-3.4 release of CCH Axcess Portal and the 2.0 release of CCH Client Axcess. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release: CCH Client Axcess (Web Interface)

The CCH Client Axcess Web interface has been updated for desktops, tablets, and smartphones. The native iOS® and Android™ apps have not yet been updated to include the changes listed below. Our focus in this release is the firm user experience through the Web browser.

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

You can also access Portal on Android™ and iOS® devices using the Client Axcess Web interface. Staff members of firms that use the standalone version of Portal (that is, not integrated with CCH Axcess™ Document) can log in to Client Axcess using their existing Portal credentials. However, most firm administration features have not yet been added to Client Axcess, and those features must still be accessed through the Microsoft® Silverlight® interface. Staff members of firms using Portal integrated with Document can continue to access Portal through Document, while their clients can use the new Client Axcess interface.

Note: To ensure your clients have the most secure, full-featured, and browser/device agnostic interface, we will disable the non-Silverlight® Simplified User Interface in November 2017 with the 2016-5.0 release. The Silverlight® Portal interface for client users will be disabled in late April 2018. Firm users will continue to use the Silverlight® Portal until all firm administrative capabilities are available in Client Axcess.

Guided Tours

Two new guided tours have been added to Client Axcess. The tours provide information about the features that are relevant for the logged-in user, with different content visible for firm users and client users.

- **New User Tour** - This tour automatically displays the first time a user logs in to Client Axcess. It guides users through the most commonly used features based on their user type. For firms that license the standalone version of Portal, the tour shows firm users information on managing client portals from the Home page, performing file- and folder-related activities, and adding users to portals. For all firms, this tour shows client users basic information about their portal, how to use file- and folder-related activities, and how to add users to their portal.

- **What's New Tour** - This tour displays the first time a user logs in to Client Axcess after a major release. The tour displays release-specific information, including how to use the features added in the release.

Note: You can re-launch either tour from the user profile menu, located in the top right corner of the screen, at any time.

Firm User Home Page

A new Home page has been added to Client Axcess for firm staff members using the standalone version of Portal. The Home page displays automatically when a firm user logs into Client Axcess. This page allows firm users to see at a glance their 50 most recently accessed or assigned portals, as well as a count of firm users, portal users, and files. If a firm user is on a different Client Axcess page, clicking the Home icon returns the user to the Home page.

Search for Portals
From the Client Axcess Home page, you can search for portals by portal name, client ID.Sub-ID, or by an email address. Click the **Search** icon in the top right corner to use search. When searching by email address, you must enter the full email address. Any portals the email address is associated with will display in the Search results.

Create and Manage Portals
From the Home page in Client Axcess, firm users of the standalone version of Portal can now create and manage client portals. Depending on the permissions assigned to the firm user, the following can be done from the Home page:

- **Add Portals** - Create a client portal by clicking the **New** button. When you enter the portal admin's email address, the system checks for other users with that email address. If a match is found, Client Axcess pre-populates the portal admin's first name and last name, simplifying the portal creation process.

- **Edit Portals** - Make changes to a portal's profile by placing a check mark next to the portal name and clicking the **Edit** button. While in the portal edit mode, you can make modifications to the portal name and the portal admin user's profile. You also can:

  - Re-assign the folder template if no files have been added to the portal yet.

  - Set portal-wide file retention.

  - Grant access to this portal for existing access groups, firm users, and client users, all combined in one convenient tabbed screen to save you time.

- **More Actions […] > Send Portal Creation Email** - You can re-send the portal creation email to the portal administrator of the selected portals.

- **More Actions […] > User Access Report** - You can run a user access report for selected portals by placing a check mark next to the portals you are interested in. The report displays a list of firm and portal users who have been granted access to the selected portals. The report can be run from the Home page or from the Search results.

Removed Portal Administrator Email Address Limit
A portal administrator's email address now can be used to create an unlimited number of portals (up to firm's license limit) in both the standalone version of Portal and the version that is integrated with CCH Axcess Document or CCH ProSystem *fx* Document. In prior releases, you could only create up to 75 portals per portal administrator email address.

Hyperlink to CCH Axcess Portal
A hyperlink to the Microsoft® Silverlight® version of CCH Axcess Portal is available to firm staff users in the user profile. If you select the hyperlink using Internet Explorer®, you will open the login page. If you select the hyperlink from any other Web browser, you will be provided an option to copy and paste the hyperlink into a Silverlight®-compatible Web browser. (Internet Explorer® is recommended.)

More Streamlined User Interface
The following user interface changes have been made in this release:

- You can now upload multiple files at one time from a mobile device when accessing CCH Client Axcess through a Web browser.

- An upload progress status bar now displays on the file Check In screen when you use Client Axcess on a desktop computer.

- The secure folders feature has been updated in the following ways:

  - A new Save button was added to allow you to save changes for specific users without exiting the screen.

  - If you re-grant all users access to a secured folder, Client Axcess automatically updates the folder status.

New in this Release: CCH Axcess Portal (Microsoft® Silverlight® Interface)

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EULA Status
The EULA status report for a client's portal now shows "declined" if the client doesn't accept the Terms of Use Agreement when logging into the Client Axcess interface.

Fixed in this Release

Errors received when printing Batch Organizers
Errors no longer occur when attempting to send Organizer PDFs to Portal integrated with Document.

Folder template errors
Errors related to folder templates that are not assigned to the portal have been resolved for Portal integrated with CCH Axcess Document.

Character limit removed for the domain in email addresses
The domain in an email address now supports an unlimited number of characters.

Known Issues

With Mozilla Firefox version 52.0 (released on March 7, 2017) support for Netscape Plugin API (NPAPI) plugins other than Flash has been suspended. Silverlight®, Java, Adobe® Acrobat® and others are no longer supported. To access the Silverlight® version of CCH Axcess Portal, you must use Internet Explorer®.