

# CCH Access™ Portal/CCH Client Access

## Welcome to CCH Access Portal 2017-4.1/CCH Client Access 2.5

This bulletin provides important information about the 2017-4.1 release of CCH Access Portal and the 2.5 release of CCH Client Access. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

As a reminder, the URL for Client Access is <https://www.clientaccess.com>. Your clients can log in here using their existing CCH Access Portal credentials. We recommend this interface for all clients, especially those who access Portal from an Apple® Mac® computer, smartphone or tablet, or those who use any web browser other than Internet Explorer.

## CCH Client Access (Web Interface)

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### File Activity Report

The File Activity Report is a new audit report available in the Client Access interface for firm administrative staff. The File Activity Report lists all file-related activity for a given month/year, and includes details like the date and time of the user's file activity, a description of the activity, which portal the file belongs to, and the user's IP address, device type, and browser.

Standalone Portal customers can generate this report from the **Management & Settings** screen by clicking the gear icon next to their name, after logging into the Client Access interface. This report is only available to you if you are a firm administrator or a firm user in the Full Rights security group.

Firms using CCH Access Portal integrated with CCH Access Document or CCH ProSystem fx Document cannot currently generate this report; however, this report can be generated for your firm by contacting Portal Support. For these customers, the report will include only Portal User activity. Firm User activity is tracked separately through Document's audit trail reports.

**Note:** IP address, device, and browser are unavailable for reports generated prior to May 2018.

### Folder Level Retention Periods

You can now assign folder-level retention periods for default folders and custom folders in Client Access. Select a folder within a portal in the desktop version, click the More Actions button, and then choose Set Folder Retention. From this screen you can add, modify, or clear previous folder retention settings. When changing a folder's retention setting, you can apply the change to existing files and new files or you can choose to apply the setting only to new files added after making the change. When you clear a folder's retention, it will inherit the Portal's retention setting, if any. Otherwise, retention will be removed and the files in the folder will remain permanently or until deleted by a user.

### Editing Your User Profile

You can now manage the personal information that is associated with your portal account in Client Access. After logging into your portal account from a desktop device, click the arrow to the right of your user and then select Update your profile in the menu, or tap the profile menu icon in your mobile device. Your profile details display in a read-only view. Click the edit icon to make the fields editable.

**Note:** We strongly encourage you to keep your personal information up-to-date with phone numbers that can be used to receive the one-time verification passcode for 2-Step Verification login. For more information and an introductory video on 2-Step Verification, click [here](#).

## CCH Access Portal (Microsoft® Silverlight® Interface)

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Minor updates only in this release.

### Fixed in this Release

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#### **Client Access Announcements**

The Announcements slide-in pane in Client Access no longer splits words improperly when word wrapping. The full word will carry to the next row.

#### **Deleting an Approver in Integrated Portal**

Resolved the @IP Address error when removing a new staff member assigned as an Approver from a client's portal in CCH Access > Client Manager > Portal screen.

#### **Integrated Portal - Help topic for Portal Configurations screen displays**

The Help topic in CCH Access > Firm Settings and Default > Portal > Configurations screen displays when selected.

Find answers to your questions in our [Knowledge Base](#).

Please feel free to [Contact Us](#) online if you have any questions.