

CCH Access™ Portal/CCH Client Access

Welcome to CCH Access Portal 2018-4.1/CCH Client Access 2.8

This bulletin provides important information about the 2018-4.1 release of Portal and the 2.8 release of Client Access. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Client Portal Licenses Add Back

Beginning with this release, when a client portal is deleted from the standalone Microsoft® Silverlight® Portal, a Client Access Portal, or CCH Access™ Document with an integrated Portal, the license is automatically added back to the portal for immediate re-use.

Delete Client Portals with Files in Client Access

The option to delete client portals is now available for the standalone version of the desktop Client Access Portal. The delete client portal feature in Client Access now allows deletion of up to 50 clients, including portals with files assigned.

Files Recently Added in Client Access

The Files Recently Added List is now available in Client Access. The Files Recently Added List displays files that have been added to Portal since the user's last logged-in session.

To access the Recently Added Files List in the desktop version of Client Access, click the history icon in the top right hand corner.

User Access Reports

User Access reports have been added to the desktop version of Client Access Portal. These reports provide comprehensive data about your users and portal accessibility. You can run firm-wide User Access reports by client or firm user type, or a user-specific report by email address.

- Firm-wide reports provide a detailed list of your clients or staff. They include information such as portal name, client ID, sub ID, portal status, file count, approver count for each portal, user count for each portal, user's first and last name assigned to each portal, user's last upload and download date, user's last login date, and IP address.
- User-specific reports can be run for a single user by email address. They provide a detailed list of the portals a user has access to, along with client ID, sub ID, portal status, if the user is a portal approver, the user's first and last name, user's last login date, and IP address.

To run the reports, on the Management & Settings page, select **Run Reports**. Then, on the Run Reports tab, choose a report and click **Run**.

To download a report, select the **Reports Available for Download** tab. When the Status has changed to *Ready*, the report is available for download. Click the **Refresh** icon for updated statuses.

Notes:

- Reports expire seven days from the date the report is created.
- Firm users without full rights can only view the data for the portals they have been granted access to.

Fixed in this Release

File Activity Report

When downloading the File Activity Report in Client Axxess, the file name properly displays the month and year selected.

Portal Integrated with Document: Portal name already exists

An issue that occurred when re-creating a client portal using a previously deleted portal name has been resolved.

More Information

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

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