

CCH Access Portal

Welcome to CCH Access Portal 2013-1.0

This bulletin provides important information about the 2013-1.0 release of CCH Access Portal. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 6. Additional information is available on CCH [Support Online](#).

Important Note - Action May Be Required

DNS Resolution

The maintenance completed for CCH Access may require an additional step for some firms, especially those on versions of Windows earlier than Windows 7. A planned DNS change may prevent you from connecting to CCH Access, requiring your DNS to be cleared. If you have an initial problem connecting to CCH Access, please do the following:

1. Open a command prompt via **Start > Run > cmd**.
2. Enter **ipconfig /flushdns**.

This will clear your saved DNS and allow you to connect to CCH Access. It should not affect any other programs you may run. If you have any additional issues, please contact CCH Access Support at 877-977-9739.

Standalone and Integrated Portal Usability Enhancements

The following enhancements are available to both Standalone and Integrated Portal customers.

Portal Session Timeout and Automatic Logout

In this release, Portal has been globally configured with a 30-minute session timeout. This timeout is applicable for both firm users and portal users/admins. After 30 minutes of inactivity, you will be prompted to remain logged in. If there is no response within 5 minutes, you will be automatically logged out. A notification that you were logged out due to inactivity is displayed. Firms will now be able to delete portal users and portals, even if users did not log out properly.

Prompt to Upload Reminder

A new Upload reminder prompt is displayed to remind you or your clients to click the "Upload" button when you have files pending upload. If you attempt to log out of Portal, browse to a new URL or close the browser window when you have files pending upload, you will be prompted to upload the files.

Integrated Portal Only Usability Enhancements

Portal View from Document Central

A new Portal View in Document Central allows you to view the Portal folder structure from within Document. Now you can more easily walk your clients through the folders to find files. Not only can you view the files and folder structure, you can interact with the files and perform any file-related actions that you have proper permissions for.

Note: Files will display in both the Portal View folders and in the appropriate Document folder. Also note that the Portal View area does not currently support drag and drop.

Preview for Files Pending Approval

You can now open a preview for files that were uploaded by your clients to the Portal and that are pending approval by the firm.

Note: There is a known issue that prevents users from previewing files in Document when using Office 365. This issue will be addressed in a future release.

Data Center Upgrades

Encryption at Rest

CCH Access Portal has always protected your customer data using industry-standard encryption for all file uploads and downloads. Another layer of protection is being added by encrypting your customer data even when it's not being accessed.

Windows Server 2012 Compatibility

The servers on which the CCH Access platform runs are in the process of being upgraded to Windows Server 2012, which will provide you a more stable environment and support for future enhancements.

SQL Full-text Searching (SQL FTS)

Windows Server 2012 no longer supports the Microsoft Indexing Service, which was previously used to index the contents of files as they were added to Portal so that their contents could be searched for in Portal. CCH Access Portal will now use SQL FTS for indexing and searching for contents of files added to Portal. This change also provides more accurate search results, greater stability, and improved scalability. This is a back-end change and does not affect how you actually perform a search.

SQL Server 2012 Compatibility (SQL 2008 Compatibility Mode)

The database servers on which the CCH Access platform runs are in the process of being upgraded to SQL Server 2012, which will support our High Availability Disaster Recovery initiative.