

# CCH Axxess Portal

Release Bulletin

Release 2012-3.4.1

May 2013

## Welcome to CCH Axxess Portal 2012-3.4.1

This bulletin provides important information about the 2012-3.4.1 release of CCH Axxess Portal. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 6. Additional information is available on CCH [Support Online](#).

## Integration Enhancements

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### Tax Mapping Now Supports Multiple Folder Templates

When using Portal integrated with ProSystem fx Document or CCH Axxess Document, to store tax returns from ProSystem fx Tax, Global fx Tax, or CCH Axxess Tax, you can now specify the default storage folder for any or all of your Portal Folder Templates that are setup in the smart client. As a result, you can now automatically publish returns to any Portal Folder Template.

### Batch Portal Creation Notifies User if Client ID/Sub-ID will be Truncated

When using the Batch Portal Creation feature of the Silverlight Portal, if the Client ID or Sub-ID in the template have more characters than are allowed by the fields, you will receive a truncation warning message advising that the IDs will be truncated in the Portal. Client IDs are limited to 15 characters and Sub-IDs are limited to 5 characters.

### Sending Files from Portal to ProSystem fx Engagement when the Filename contains the Ampersand (&) character

When sending files from Portal to Engagement, the filename cannot contain the ampersand character. A message will display reminding the user not to send files with the ampersand in the filename.

### Updates to Custom Folders

A defect in a previous version of Portal allowed Portal Administrators (clients) to be able to create custom folders. These custom folders were not synchronized with Document and therefore did not display in Document when using Portal integrated with ProSystem fx Document or CCH Axxess Document. When using Portal integrated with Document, custom folders can now be created by Firm Users **only**; however, they are available for both Firm Users and client Portal Users to add files to or work with files in the custom folder. If your firm uses Portal that is not integrated with Document, then Portal Administrators can still create custom folders, since there is no synchronization required between Portal and Document. If Document is added at a later time, Portal Administrators will no longer be allowed to create custom folders. Additionally, if a file in a custom folder is deleted and sent to the recycle bin, you will be unable to change the folder template for that client's portal until the file is purged from the recycle bin.

## Usability and Ease of Use Enhancements

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### Pending Upload Reminder

In the previous release, the Portal add files process was simplified and added support for drag and drop. With this change, users are required to click the Upload button to upload files to Portal. If users close the browser/tab or redirect to a different website prior to clicking the Upload button, a confirmation dialog will display advising the user that they have files that have not yet been uploaded. Users can choose to stay on the page to complete the upload, or they can leave the page, cancelling the upload process.

#### Updated Manage Portal List

The Manage Portal list screen lists counts of firm users, portal users and file counts, but this can cause performance issues when there are very large portal lists. To improve performance while loading this screen, the system will no longer display these count values by default. There are options to display these for an individual portal, or for all portals, if necessary.

#### Add Portal User Guide to Portal User Creation and Portal Creation Email Notification

When using Portal integrated with ProSystem fx Document or CCH Axxess Document, you can now add a Portal User Guide to the Portal User Creation or Portal Creation email notifications. This guide can be sent to your clients to provide basic instructions for using the Portal. CCH provides editable Portal User Guide templates in MS Word format, which can be downloaded from [here](#).

#### Search Label Changed

When performing a search in Portal, on the Search Options screen there is a field for searching Metadata and Word search, but only the word search was intended. The label was changed from "Metadata and Word:" to "Words:" to reflect the actual search functionality.

### ADDITIONAL INFORMATION

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You can learn more about CCH Axxess by visiting our Web site [here](#), or contact your local sales representative. For support information, please visit [Customer Support Online](#) and stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.