CCH Axcess™ Practice

Welcome to CCH Axcess Practice 2017-5.0

This bulletin provides important information about the 2017-5.0 release of CCH Axcess ™ Practice. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

2-Step Verification (Multi-Factor Authentication)
As indicated in previous CCH Software News emails, we will change the default option to be on or enabled so your firm must opt-out to disable the feature. We strongly discourage the disabling of 2-Step Verification.

Notes:

- **2-Step Verification** applies to the CCH Axcess login mode and not the Active Directory or Federation Services login mode.

- **2-Step Verification** is available at the firm level only for default administrators and not on a user-by-user basis.

For more information, please see our Knowledge Base Article on 2-Step Verification.

Data Axcess Utility User Rights
You may run the Data Axcess Utility (DAU) with a user who is not the default administrator. As a security best practice, we recommend the following:

- **Create a new security group for DAU** - In this security group, navigate to Functional rights > Reports > Data Axcess. In the row for Request and Download, grant the edit permission.

- **Create a new staff that is exclusively for DAU with:**

  – A name that indicates it is dedicated to this unattended process.

  – Phone numbers and/or distribution list email addresses for IT staff who need to manage this user. This is important for CCH Axcess multi-factor authentication.

  – Assignment to the security group described above.

- **Log in to CCH Axcess Dashboard –** Log in with the new user, accept the terms of use, set security questions and answers, and change the password.

- **Open Data Axcess Utility Manager** - Update the username and password.

- **Create a reminder** - Create a calendar reminder or other procedure to update the password before it expires.

Data Axcess Utility Enrollment
Firm settings for reports contain an option to populate the Data Axcess data warehouse. If your firm already licenses Data Axcess Utility, no action is required.

If you choose to add Data Axcess Utility, you will be directed to enable this option during implementation. For more information about Data Axcess Utility visit [CCH Axcess™ Data Axcess APIs and Utility](#) on our website or contact your sales representative.

Issues Resolved

This section contains information about issues that are resolved in this release.

Billing Fee Agreements (BFA) for Projects

- Automatic Billing Fee Agreements are now saved in the project when scheduled by project status.

- Manual Billing Fee Agreements are now saved in the project.