

CCH Access™ Workstream

Welcome to CCH Access Workstream 2017-5.0

This bulletin provides important information about the 2017-5.0 release of CCH Access™ Workstream. 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 Access 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 Access Utility User Rights

You may run CCH Access™ Data Access 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 Access. 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 Access multi-factor authentication.
 - Assignment to the security group described above.
- **Login to CCH Access Dashboard** - Log in with the new user, accept the terms of use, set security questions and answers, and change the password.
- **Open Data Access 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 Access Utility Enrollment

Firm settings for reports contain an option to populate the Data Access data warehouse. If your firm already licenses Data Access Utility, no action is required. If you choose to add Data Access Utility, you will be directed to enable this option during implementation. For more information about Data Access Utility, visit [CCH Access™ Data Access APIs and Utility](#) or contact your sales representative.