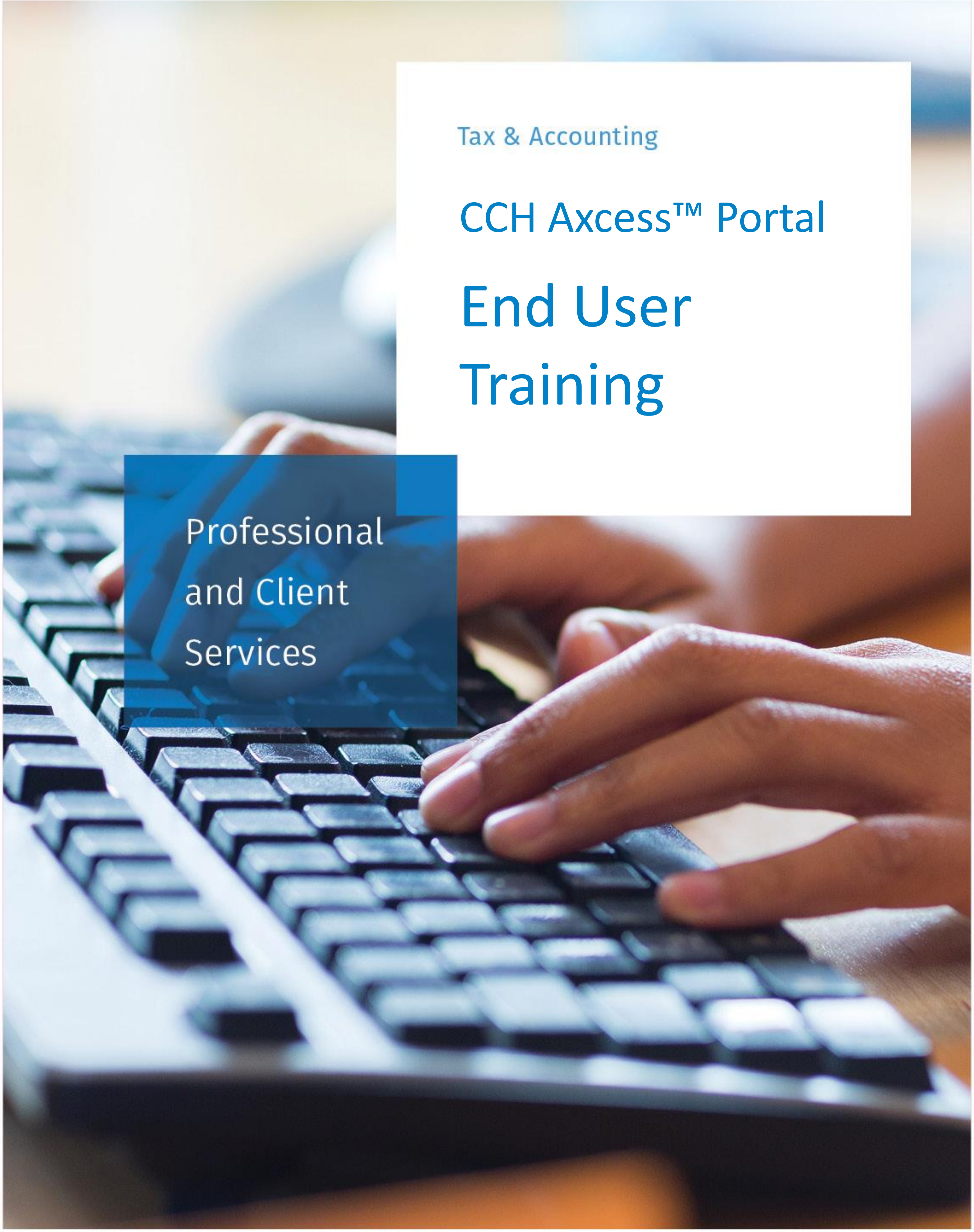
Wolters Kluwer

When you have to be right



Tax & Accounting

CCH Axcess™ Portal

End User Training

Introduction

This course provides introductory training on CCH Axcess™ Portal. Portal is a secure file exchange application that enables accounting firms to both transfer and receive electronic files in a secure environment. There is no file upload size limit associated with Portal, which also makes it a perfect tool for the transmission of large files. This course will cover basic functions and features for using Portal in the accounting firm environment.

Continuing Professional Education

This course qualifies for one hour of Specialized Knowledge & Applications credit.

Visit http://cchgroup.com/training/feedback to request CPE and provide an evaluation of this course.

Session code: ____________________

CPE qualification may vary by state

Objectives

Upon completion of this course, you should be able to:

- Understand the system considerations
- Understand user roles in Portal
- Understand the components of the Portal home page
- Add files to Portal
- Work with files in Portal

Icon Legend

Keys	Quick reference to the key aspects of a particular function
Tip	Best practice tips and shortcuts
Notes	Informational notes about functions
Caution	Important warnings about a function

Table of Contents

Web Browser and Interface Considerations

CCH Client Axcess

Designed to increase the ease of collaboration with your clients, CCH Client Axcess is an HTML5 interface which allows users to access Portal in order to upload and download files from any web browser or operating system.

Access CCH Client Axcess using the following link: https://www.clientaxcess.com

CCH Client Axcess Mobile

CCH Client Axcess Mobile can be accessed on smart phones and tablets by downloading the free mobile app. Search "CCH Client Axcess" in the Apple® App Store or the Google® Play Store.

Portal Roles

Firm Admin

The firm admin is the first user created for a firm after the order for Portal is processed. The email address entered on the portal order form will receive the welcome email notifications from CCH with the temporary password and login instructions. The firm admin has all administrative rights within Portal and is responsible for setting up the first portal in the system and creating all other firm users.

Firm User

The firm users are the employees of the firm who need access to Portal. Their work email address should be used as their login ID. The firm admin will initially create firm users and grant them access to portals. Firm users are assigned to specific portals; these are the only portals they can access.

Portal Approver

An approver is a firm user of a portal selected to receive email notifications related to that specific portal. Assigning approvers permits you to control who receives the emails related to a portal, which gives you much more flexibility in granting broader access to portals, as managing email volume is not a concern.

Portal Admin

The portal admin user is always your client (taxpayer or primary business client contact) and is the first client-side user created for each portal. A portal cannot be set up without designating a portal admin user. The portal admin performs all basic Portal functions and controls access to the portal from an external or third party user perspective. The client's email address is used for the portal admin user ID.

Portal User

Portal users are the additional client-side, external, or third party users of Portal set up by either the portal admin or a firm user (with administrative rights) using an appropriate email address.

Logging in to Client Axcess

Figure 1

Login Tips

- The login ID is **not** case sensitive.
- The temporary password for your first login to Portal will be sent in an email notification. Copy and paste your temporary password to the password field on the login page.
- The password must contain at least one upper-case letter, one number, and one special character.
- The password is case sensitive and must be between 8 and 32 characters.
- Users are automatically logged out of Portal after 30 minutes of inactivity.

Your firm's logo will appear prior to login if you elect to save your login ID.

Selecting a Portal

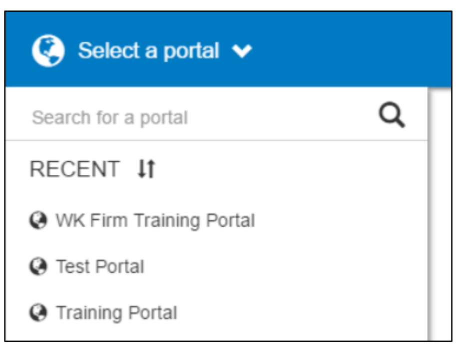


Figure 2

To view a portal, click a portal name in the drop-down menu or search by typing any string of characters in the portal's name, and then click the magnifying glass icon.

Navigating Client Axcess

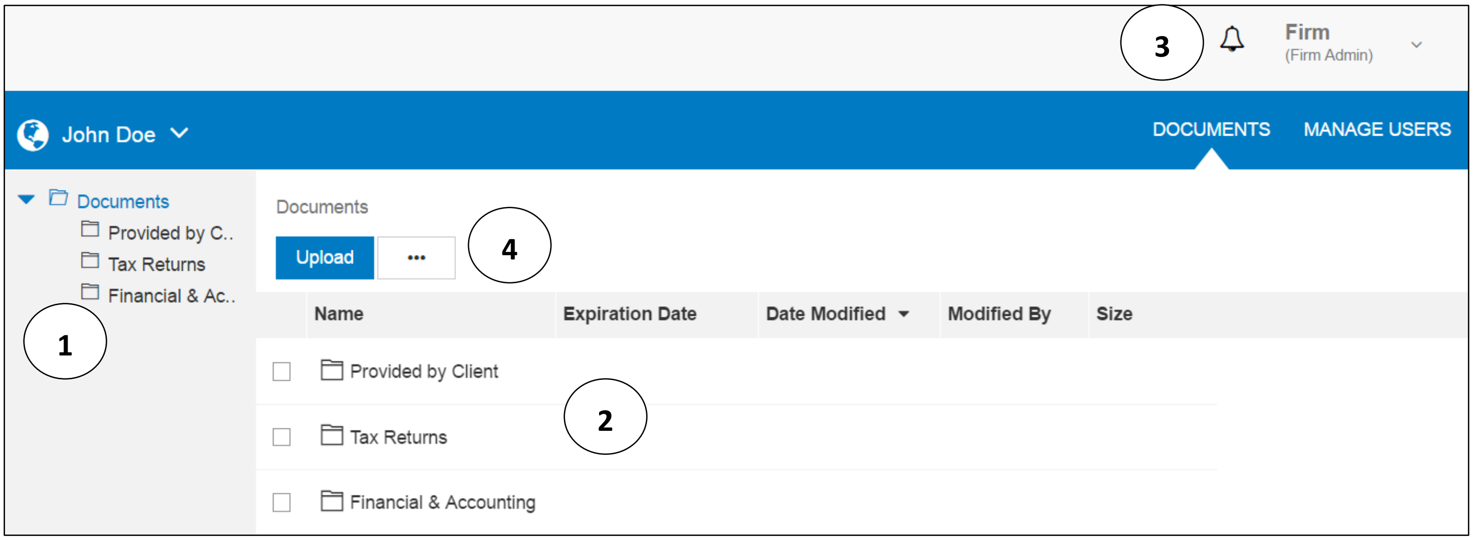


Figure 3

Client Axcess Key Features

1. **Documents** Click to browse into the folders of the selected portal.
2. **Folders** Click on a folder to view its files or begin the process of adding a file.
3. **Announcements** View an announcement created for the selected portal.
4. **More Options** **Click the More Options button to see additional choices for working with the selected folder or file.**

Uploading and Downloading Files

Uploading Files

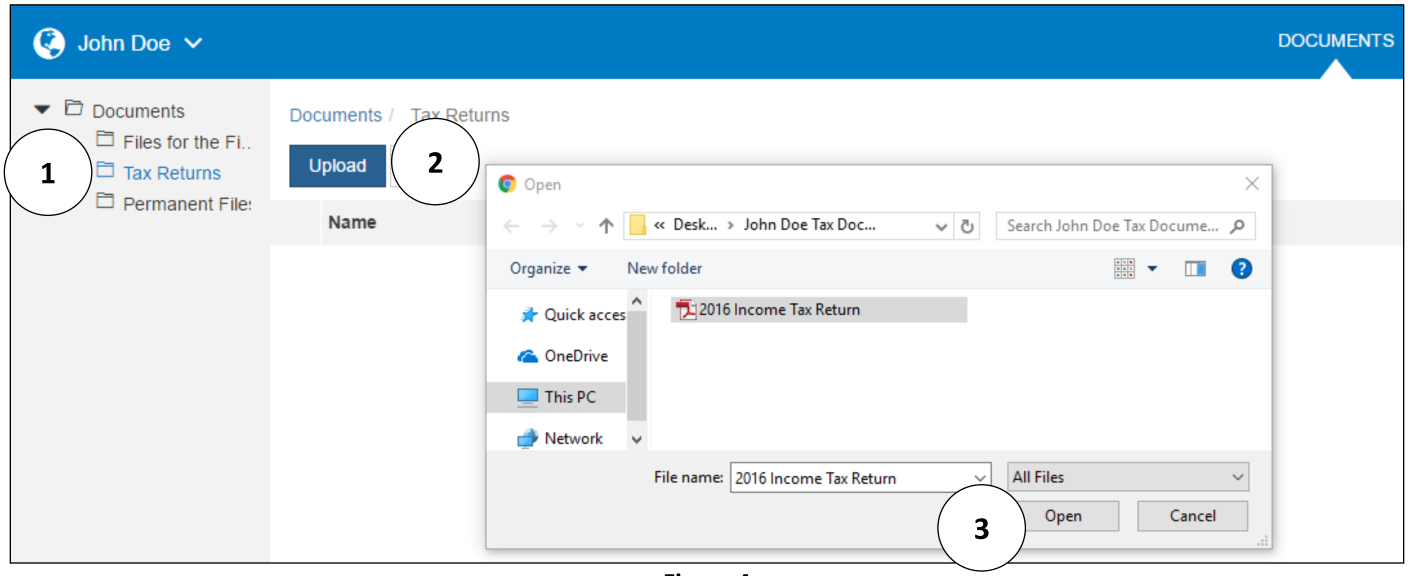


Figure 4

Follow the steps to add a file to your portal:

1. Click the destination folder (where the file will be located)
2. Click **Upload**, browse to, and select the file(s) you wish to upload
3. Click **Open**

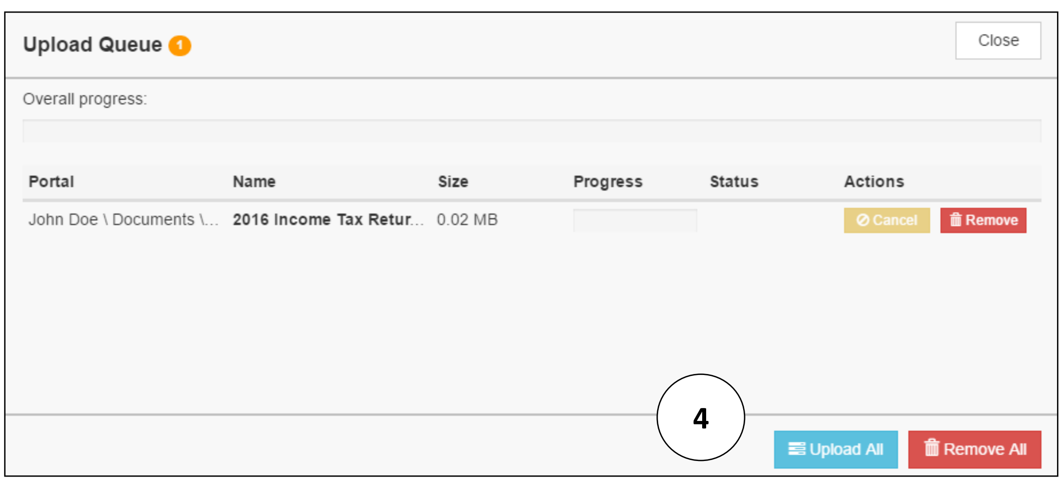


Figure 5

4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s). An email notification is sent to the portal admin and portal users.

You will see an on-screen confirmation that your file(s) were successfully added to Client Axcess. Return to your Documents or simply close your browser window to log out of Client Axcess.

You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Axcess.

Click the  icon at the top, right-hand corner of the page to reactivate the Upload Queue if you accidentally minimize it prior to selecting Upload All.

Downloading Files

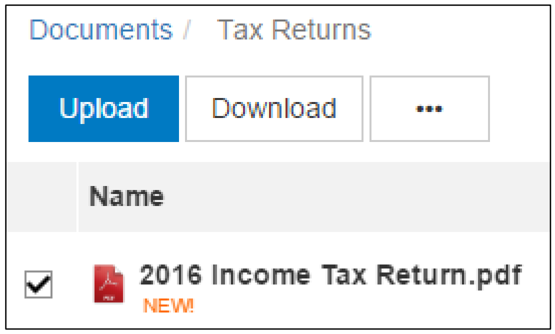


Figure 6

Click on a folder to display the files located in the folder. To download a file, **click the file name** or **check the box and click Download**, either option will launch your browser's file download prompt allowing you to open or save the file. You can download multiple files simultaneously.

To download files, it may be necessary to disable your pop-up blocker in Google® Chrome®, or other web-browsers.

Working with Files

Checking Out Files

Collaborate with your clients by having them use the **Check Out** feature to download a file, make changes, and then add the modified file back to Client Axcess. The file will be overwritten to reflect their changes upon Check In.

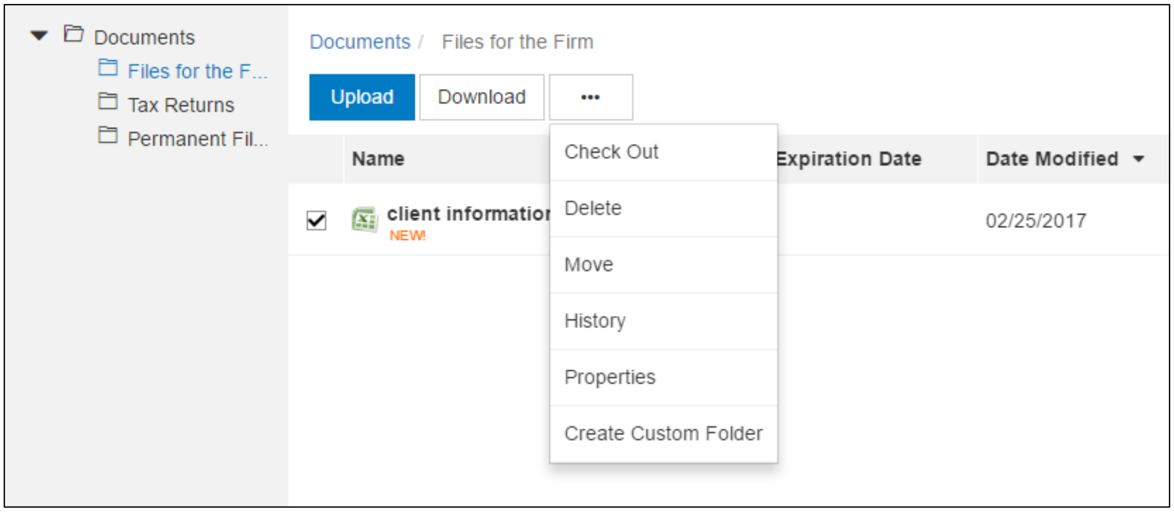


Figure 7

Steps to Check Out a file

1. Check the box to the left of the file name, and then click the **More Options** button
2. Select **Check Out**
3. On the **Check-out** prompt, click the **Due date to check in** field, and choose the latest date you expect to Check In the file, then click **Check Out**
4. When prompted by your web browser, save the file to your computer or network
5. Launch the file and make any desired changes, then click **Save** and close

Checking in Files

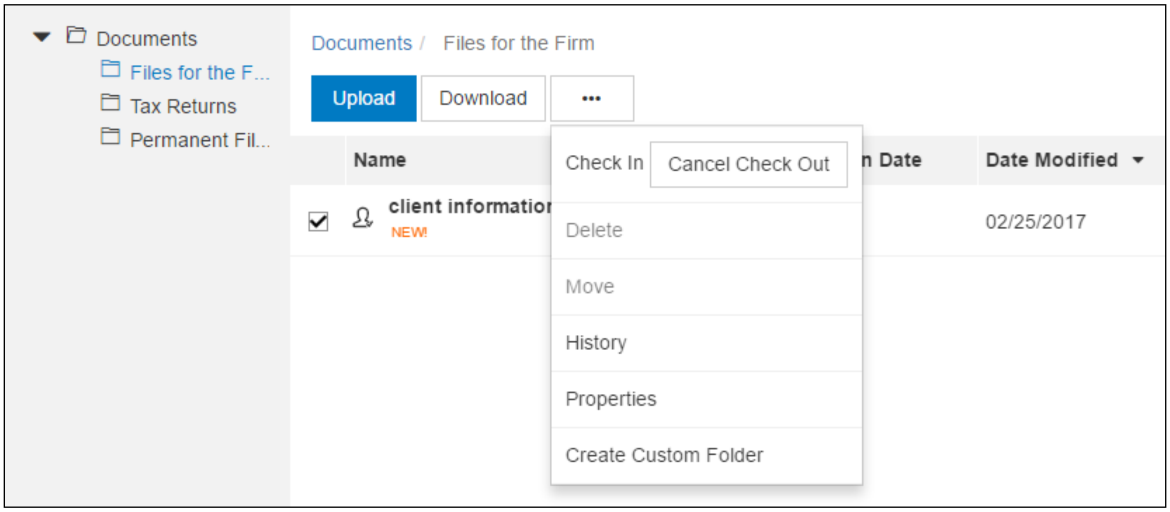


Figure 8

Steps to Check In a file

1. Log in to Client Axcess, browse to the folder where the checked out file is located
2. **Check the box** to the left of the file name
3. Click the **More Options** button, and select **Check In**
4. When prompted, click **Browse** and navigate to the checked out file on your computer
5. Click **Check In**. You will receive confirmation the file has been checked in successfully

Deleting Files

Steps to Delete a file

1. Browse to the folder where the file is located
2. **Check the box** to the left of the file name
3. Click the **More Options** button, and select **Delete**

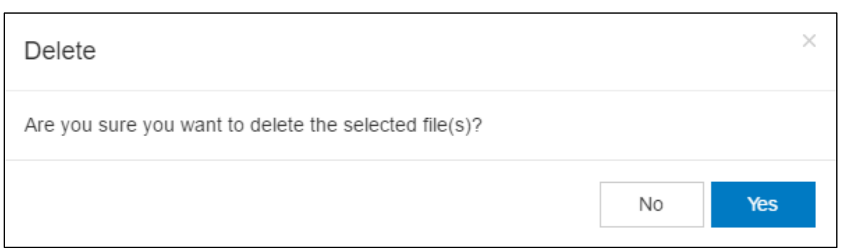


Figure 9

4. When prompted, click **Yes** to confirm you want to delete the file

Moving Files

If you find a file has been saved into the wrong folder, you may move it into the correct folder.

Steps to Move a file

1. Browse to the folder where the file is currently located
2. Check the box to the left of the file name
3. Click the **More Options** button, and select **Move**

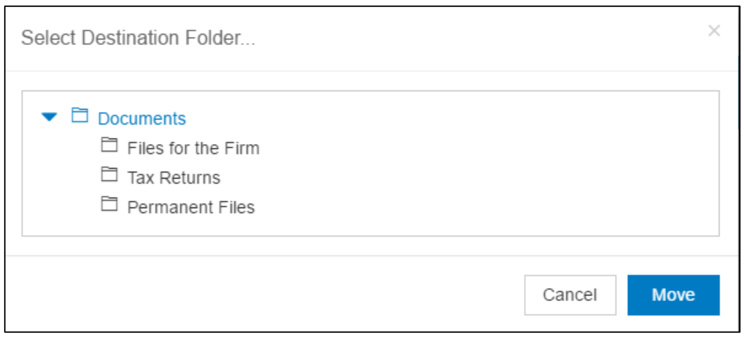


Figure 10

4. Choose the folder you want to move the file to, and click **Move**.

File History

View the file History to see everything done to the file from the time it was uploaded into the portal.

Steps to view History

1. Log in to Client Axcess, browse to the folder where the file is located
2. **Check the box** to the left of the file name
3. Click the **More Options** button, and select **History**

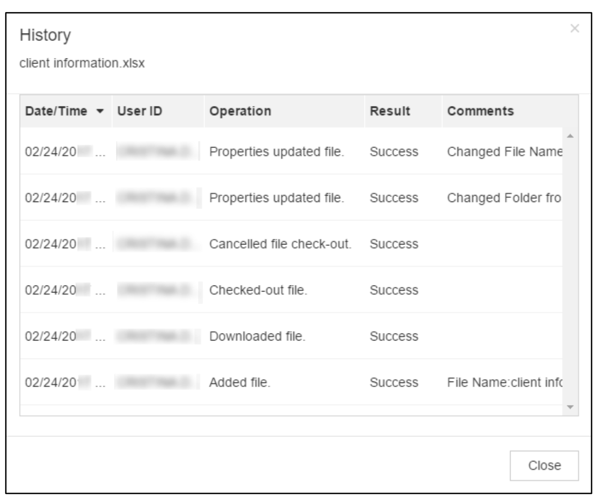


Figure 11

Working with Folders

In many cases, the default folders set in the portal are all that is needed and there is no need for restricted access. However, if the volume of files or Portal Users necessitate more organization and control, it can be accomplished by creating custom folders and/or applying folder level security.

The Firm Admin, Portal Admin, and Firm and Portal Users assigned to the Administrator file management role have the necessary security privileges to perform these functions.

Creating Custom Folders

A Firm User with Administration rights for a portal can create a custom folder in that portal. Folders may be added at the root of a portal (alongside the default folders) or as subfolders of any folder.

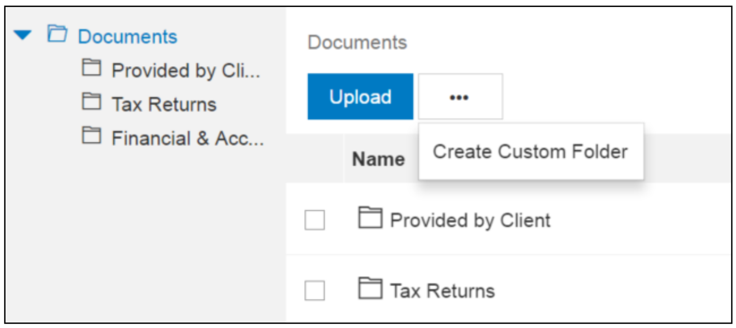


Figure 12

To create a Custom Folder, click the **More Options** button and select **Create Custom Folder**.

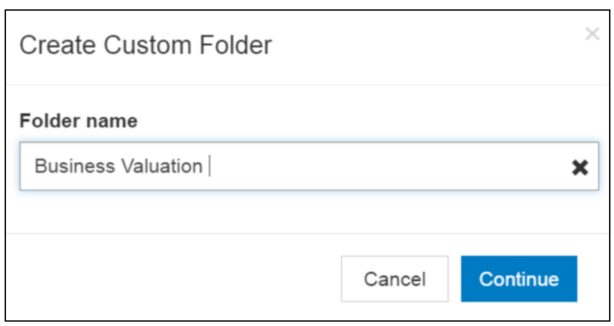


Figure 13

Type in a name that describes the content of the files that will be added to the folder, click **Continue**.

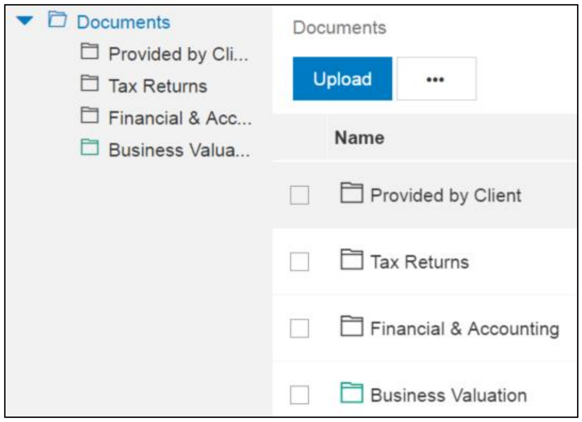


Figure 14

The new custom folder is now visible with the default folders in Portal. Check the box to the left of the folder to create a custom subfolder, rename, delete, or secure the folder.

Securing Folders

If needed, a user with Administration rights can limit which files are visible to Firm or Portal Users at the folder level by using the **Secure Folder** feature. Folder security can be applied to both default and custom folders and subfolders. When folder security has been applied, the folder is only visible to those with access to the folder.

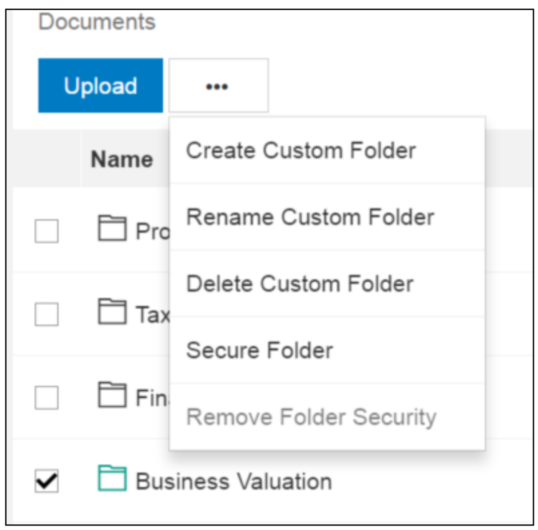


Figure 15

To secure a folder, **check the box** located to the left of the folder, and select the **More Options** button. When presented with the menu, choose **Secure Folder**.

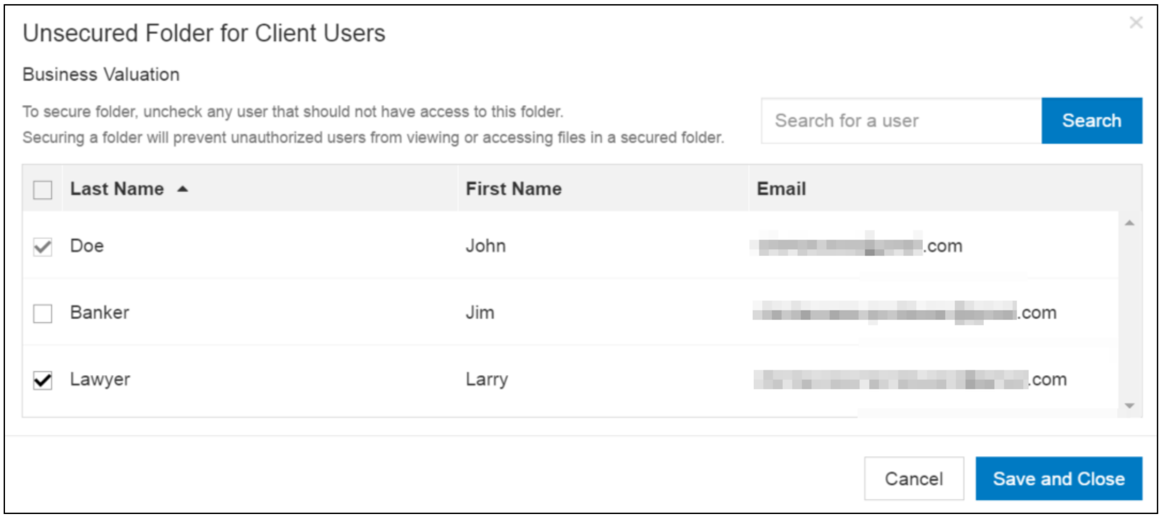


Figure 16

You will be prompted to specify which Portal Users **should NOT** be able to access files within the folder. **Uncheck the box for each user that should NOT have access to the folder**, then click **Save and Close**.

To edit or remove folder security, check the box, click the **More Options** button, and select **Secure Folder** or select **Remove Folder Security**.

Figure 17

When security is applied to a folder, the icon changes from a folder to a lock.

Changing Passwords and Logging Out

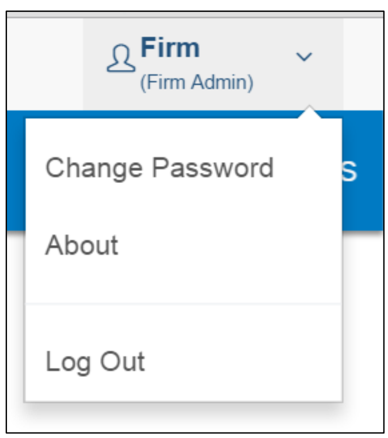


Figure 18

Close your browser or click your profile icon at the top right-hand portion of the screen, and select **Log Out** to exit Client Axcess. You can also change your password from this menu.

Resources

Help

The program includes complete on-screen Help. Click the question mark icon at the top right corner of Portal to launch help topics specific to the window you currently have selected. You can also select from a list of functions, including a **Table of Contents**, **Search**, **Glossary**, and **Favorites**.

Additionally, the CCH Axcess page at http://support.cch.com includes links to the **Knowledge Base**, **Release Bulletins**, **Training Videos**, **Supported Environments**, **CCH Software News**, **CCH Software News Profile Setup**, **Application Status**, and a **Speed Test**.

YouTube™ Channel

Please visit the official Wolters Kluwer Tax & Accounting US YouTube™ channel to find training and support videos, customer testimonials, information from industry experts, and details on the CCH Connections: User Conference.

https://www.youtube.com/user/CCHWoltersKluwer

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