




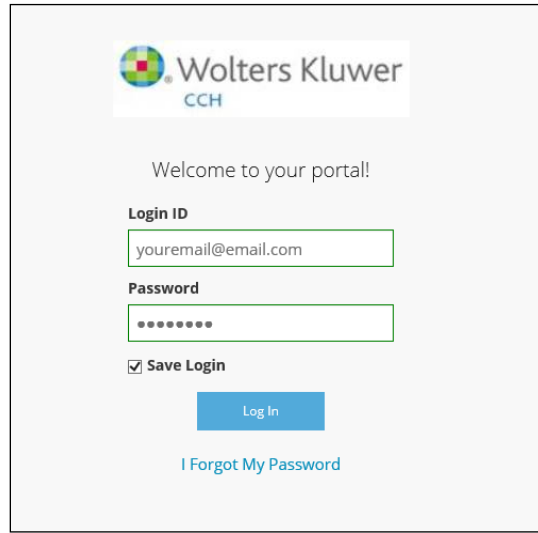
CCH Client Axxcess™ Portal User Guide



Icon Legend		Tips	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Warning	Important warnings about a function

Logging in to CCH Client Access

Refer to your welcome email for the temporary password needed for your initial login to Client Access.



Login



Login Tips

- The Login ID (email address) is not case sensitive; the temporary password is.
- You will be required to change your password upon logging in for the first time and answer security questions. Your security questions can help you access your portal if you ever forget your password.
- Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.
- Your password may be reset at any time by clicking **“Forgot password?”**.
- If prompted, review and agree to Davie Kaplan’s end user license agreement. You can also download a copy.

Downloading files from Client Access

John Doe

DOCUMENTS MANAGE USERS

Documents

Upload Download ...

Name	Expiration Date	Date Modified	Modified By	Size
Provided by Client				
Tax Returns				
Financial & Accounting				

Client Access Home Page

Select a portal



If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page.



After logging in to Client Access, you will see a list of folders used to organize your files. **Click on a folder to display its files.**

Documents / Tax Returns

Upload Download ...

Name
<input checked="" type="checkbox"/> 2015 Tax Return.pdf NEW!

Download Files



To download a file, simply 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.



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

Uploading files to Client Access

John Doe DOCUMENTS

Documents / Provided by Client

Upload

Name

2015 Source Documents.pdf

2/29/2016 2:14 PM Adobe Acrobat Doc...

File name: 2015 Source Documents.pdf All Files

Open Cancel

Upload Files



Follow the steps to add a file to you Client Access 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**

Upload Queue 1

Close

Overall progress:

Portal	Name	Size	Progress	Status	Actions
John Doe \ Documents \ ...	2015 Source Document...	0.01 MB			Cancel Remove

4

Upload All Remove All

Upload Queue

4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access.




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



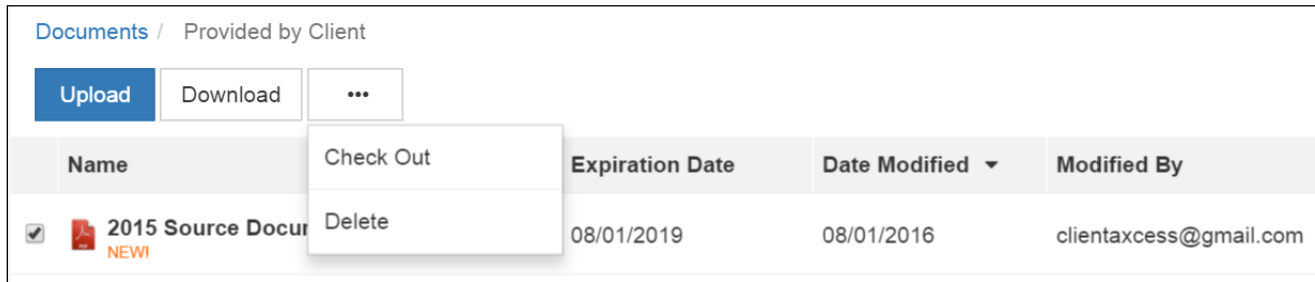
You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Access.



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.

Working with Files in Client Access

Deleting Files



The screenshot shows a web interface for Client Access. At the top, there are buttons for 'Upload', 'Download', and a three-dot menu. Below this is a table with columns: 'Name', 'Expiration Date', 'Date Modified', and 'Modified By'. A file named '2015 Source Docu' is selected, and a context menu is open over it, showing 'Check Out' and 'Delete' options. The file's expiration date is 08/01/2019 and it was modified on 08/01/2016 by clientaccess@gmail.com.

Name	Expiration Date	Date Modified	Modified By
<input checked="" type="checkbox"/> 2015 Source Docu <small>NEW!</small>	08/01/2019	08/01/2016	clientaccess@gmail.com

Delete Files



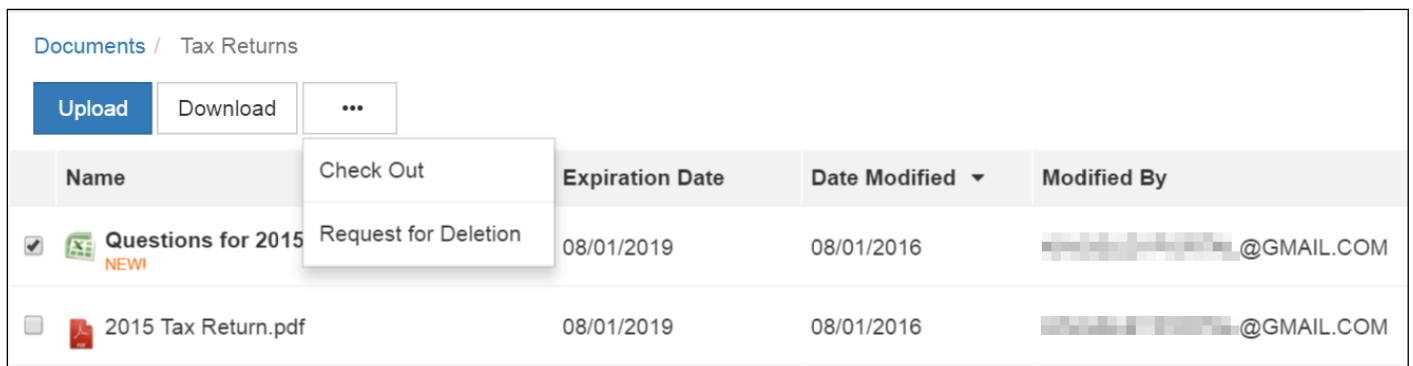
You can **not** delete files uploaded by Davie Kaplan or other Portal users. You can delete files that you upload. Click the box to the left of the file name, click the **More Options** (ellipsis) button, and then choose **Delete**. You will be prompted for confirmation, click **Yes** to remove the file from Client Access.



If you would like to have a file added by Davie Kaplan or another portal user removed from Client Access, follow the steps above, but choose the option “**Request for Deletion**”, which will be displayed instead of the Delete, and will email to Davie Kaplan notifying us that you want the file to be deleted.

Checking Out Files

Collaborate with us by using the Check Out feature to download a file, make changes, and then add the modified file back to Client Access. The file will be overwritten to reflect your changes upon Check In.



The screenshot shows a web interface for Client Access. At the top, there are buttons for 'Upload', 'Download', and a three-dot menu. Below this is a table with columns: 'Name', 'Expiration Date', 'Date Modified', and 'Modified By'. Two files are listed: 'Questions for 2015' and '2015 Tax Return.pdf'. A context menu is open over the first file, showing 'Check Out' and 'Request for Deletion' options. Both files have an expiration date of 08/01/2019 and were modified on 08/01/2016.

Name	Expiration Date	Date Modified	Modified By
<input checked="" type="checkbox"/> Questions for 2015 <small>NEW!</small>	08/01/2019	08/01/2016	XXXXXXXXXX@GMAIL.COM
<input type="checkbox"/> 2015 Tax Return.pdf	08/01/2019	08/01/2016	XXXXXXXXXX@GMAIL.COM

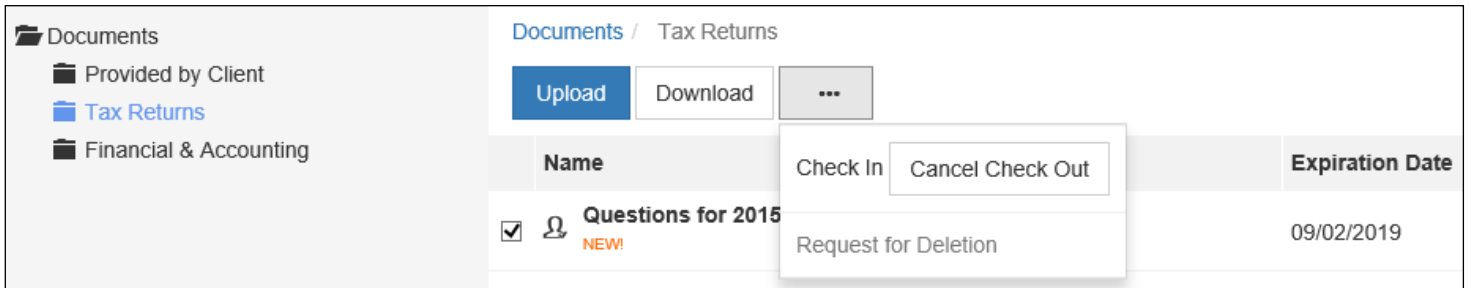
Check out a file



Steps to Check Out a file

1. Check the box to the left of the file name, and then click the **More Options** (ellipsis) 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



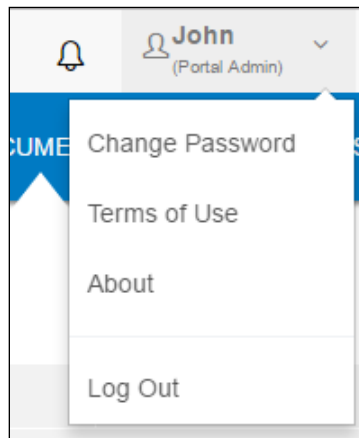
Check in a file



Steps to Check In a file

1. Log in to Client Access, 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** (ellipsis) button, and select **Check In**
4. When prompted, click Browse and navigate to the checked out file on your computer.
5. Click **Check In**
6. You will receive confirmation the file has been checked in successfully

Changing Passwords and Logging Out



User Options



At the top right-hand portion of the page, click the arrow to view your user options. From this menu you can change your password or Log out of Client Access.

Advanced Features

This section is intended to provide further assistance on the more complex features available to a Portal Admin user. The advanced features are optional, and are not required for each Client Access portal.

Portal User Roles

Portal Admin

The Portal Admin is the primary user for each Client Access portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access for other Portal Users. The Portal Admin user will be the only user that exists initially when a portal is created.

Portal User

A Portal User is created and granted access by the Portal Admin or the firm. Portal Users should only be created when Portal access is required by more than one person.

Example of Advanced Portal Use

- You may find situations in which it is practical to grant portal access to a third party. For example, a banker that you and the firm collaborate with on a regular basis. Before having access to Portal; options to exchange information included email, fax, CD-ROM, or hard copy paper, and in many cases you had to request the document from the firm before you could provide it to the bank. As the Portal Admin, you may create a Portal User allowing your banker access to requested documents and the ability to add files at the request of you and the firm; considerably reducing the time and resources spent to exchange information. The security level of Portal far exceeds email, which is most often the primary medium of exchanging electronic files.
- If the firm has created more than one portal for you, you will be able to control which portal(s) your banker or other third party may view.
- Your firm's portal solution, may or may not, provide you with the ability to secure folders. If available, this feature allows the Portal Admin to control a Portal User's access to one or more folders within a portal.

Managing Portals



The Portal Admin may grant portal access to others by creating Portal Users.

There are three steps to create Portal Users:

1. Create the Portal User
2. Grant the Portal User access to one or more portals
3. Choose the Portal User's File Management Role for each portal they are granted access

About File Management Roles

There are five File Management Roles that can be assigned:

1. **Administrator** – Allows Portal Users to perform all file operations.
2. **Standard User** – Allows Portal Users to perform the most common file operations.
3. **Limited User** – Allows Portal Users to perform a limited number of file operations.
4. **Read-only User** – Allows Portal Users to download files and review related information.
5. **Upload-only User** – Allows Portal Users to upload files and review related information.



It is our recommendation that Administration rights NOT be granted to Portal Users.

Create Client Access Portal Users

The screenshot shows the 'Manage Users' interface. At the top, there is a user profile for 'John Doe' and navigation tabs for 'DOCUMENTS' and 'MANAGE USERS'. Below the navigation, there is an 'Add User' button and a search bar with the text 'Search for a user' and a 'Search' button. A table lists existing users with columns for 'Last Name', 'First Name', 'Email', 'Grant Acces...', and 'Access Expiration'. Two users are listed: 'Banker' (Jim) and 'Doe' (John). Both have 'Grant Acces...' checked and 'Access Expiration' dates.

<input type="checkbox"/>	Last Name ▲	First Name	Email	Grant Acces...	Access Expiration
<input type="checkbox"/>	Banker	Jim	██████████@gmail.com	<input checked="" type="checkbox"/>	11/30/2016
<input type="checkbox"/>	Doe	John	██████████@gmail.com	<input checked="" type="checkbox"/>	██████████

Add Portal User



From the Client Access home page, click **Manage Users**, then click **Add User**.

The screenshot shows the 'Add a user to John Doe's portal' form. At the top, there is a user profile for 'Jim (Portal User)' and buttons for 'Cancel' and 'Save and Close'. Below the navigation, there are two tabs: 'User Profile' and 'Assigned Portals'. The 'User Profile' tab is active, showing four required fields: '*Login ID (email address)' with the value 'newuser@email.com', '*Default security user role' with a dropdown menu set to 'Limited User', '*Last name' with the value 'User', and '*First name' with the value 'Portal'.

Create Portal User



On the **User Profile** tab, enter the Login ID (email address), last and first name of the user; these are the only items that are required. The next step is to click the **Assigned Portals** tab.

Create Client Access Portal Users Continued:

Portal Name	File Management Role	Grant Acces...	Access Expiration
John Doe	Limited User	<input checked="" type="checkbox"/>	12/31/2016

Assign Portals to a Portal User



Assign a Portal User to a Client Access Portal

1. Initially, only the portal you are logged in to displays, check the **Grant Access** box to allow access to this Portal. Click **Assign more portals** to grant the new user access to other portals the firm has created for you, if applicable.
2. If necessary, modify the assigned **File Management Role** for the selected Portal.
3. To prevent long-term access, select an **expiration date** for the user's access to this portal (optional).
4. Select **Save and Close** to create the Portal User. Emails containing login information will be sent to the login ID (email address) of the Portal User.

Editing or Deleting Client Access Portal Users

Last Name	First Name	Email	Grant Acces...	Access Expiration
Banker	Jim	@gmail.com	<input checked="" type="checkbox"/>	11/30/2016

Edit or Delete a Portal User



Access to a Portal may be modified or terminated at any time. In the **Manage Users** window, click the box to left of the user's name, and then click the **More Options** (ellipsis) button to delete the user, or click the **Edit** button to modify.



It is important to terminate access when no longer needed by the Portal User. If you need assistance please contact the firm.