CCH Client Axcess™ User Guide

Welgaard

CPAs & Advisors

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

CCH® Client Axcess
https://www.clientaxcess.com

CCH® Client Axcess allows you to receive and share files with Welgaard from any web browser or operating system.

It is important to note that based on Welgaard's portal configurations, you may not have access to every feature covered in this guide.

Logging in to Client Axcess

For added security, Welgaard is utilizing multi-factor authentication ("MFA") to confirm your identity. MFA allows users to confirm their identity by entering a code that is sent to them via email, text message, or voice message.

To log in for the first time, click the authentication link in your Portal welcome email. You will be asked how you would like to receive your authentication code. You may select to receive your authentication code via email, text message (if available) or voice prompt via telephone (if available).

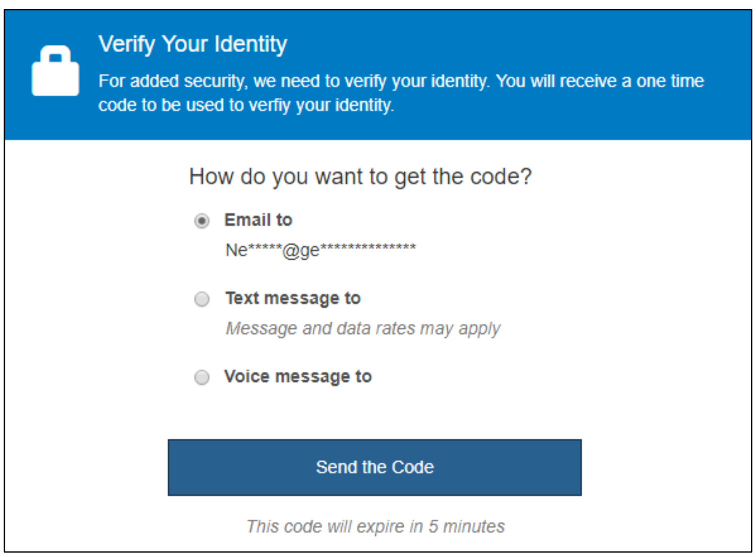

Figure 1

On the next screen, enter the code. Check the box at the bottom if you would like Portal to trust your computer or other device for up to 90 days. Using a trusted device means you will not have to repeat the Multi-Factor Authorization procedure. In 90 days, you will have to request another authentication code.

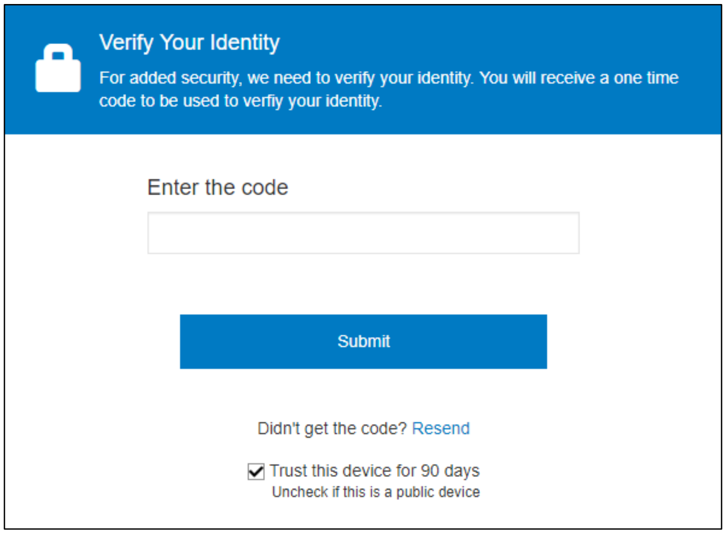

Figure 2

Once you have submitted the code, you will be prompted to set up your password.

Login Tips

- The Login ID (email address) is not case sensitive.
- 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.
- Your password may be reset at any time by clicking "**I Forgot My Password?**".
- If prompted, review and agree to the Welgaard end user license agreement. You can also download a copy.

Guided Tours

Tours provide information about the features that are relevant for the logged-in user. There are two tours:

- New User Tour - This tour automatically displays the first time a user logs in to Client Axcess. It guides users through the most commonly used features based on their user type such as information about their portal, how to use file- and folder-related activities, and how to add users to their portal.
- What's New Tour - This tour displays the first time a user logs in to Client Axcess after a major release. The tour displays release specific information, including how to use the features added in the release.

You can re-launch either tour from the user profile menu, located in the top right corner of the screen, at any time.

Downloading files from Client Axcess

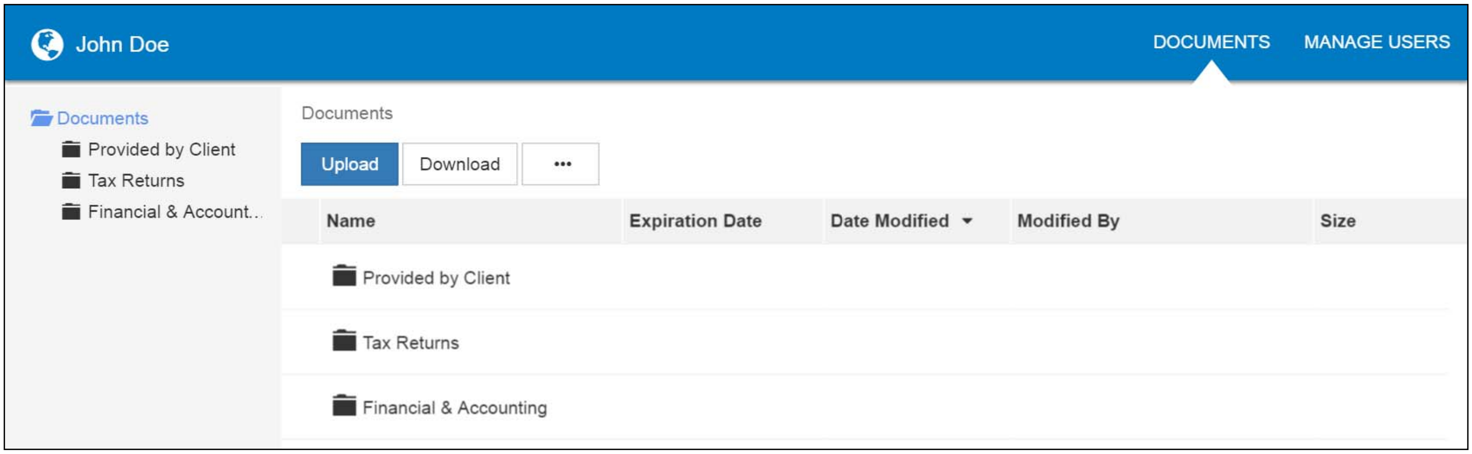

Figure 3

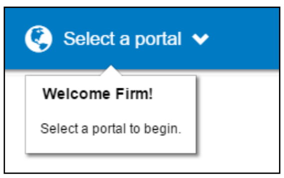

Figure 4

If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page, and then select or search for a portal by name.

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

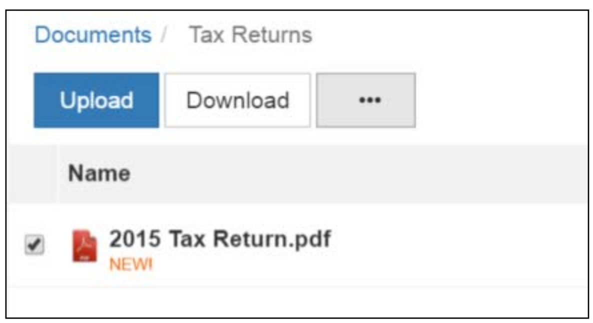

Figure 5

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. You can download one or multiple files at a time.

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

Uploading files to Client Axcess

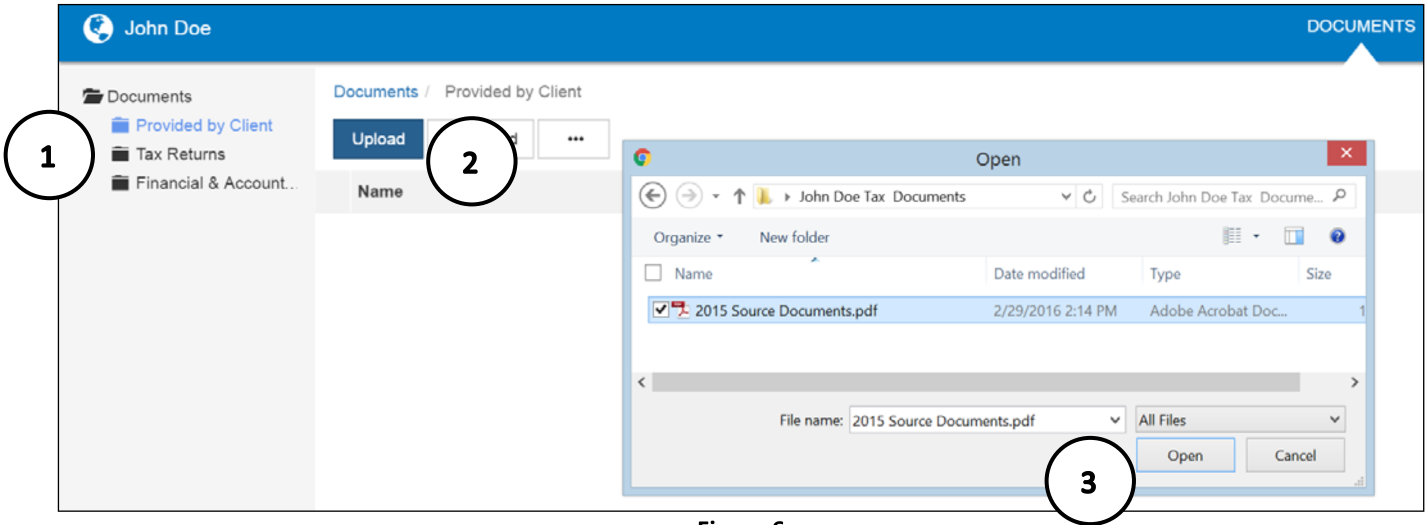

Figure 6

Follow the steps to add a file to you Client Axcess 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 7

4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Axcess. An email notification is sent to [Firm Name].

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 exit 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.

Working with Files in Client Axcess

Deleting Files

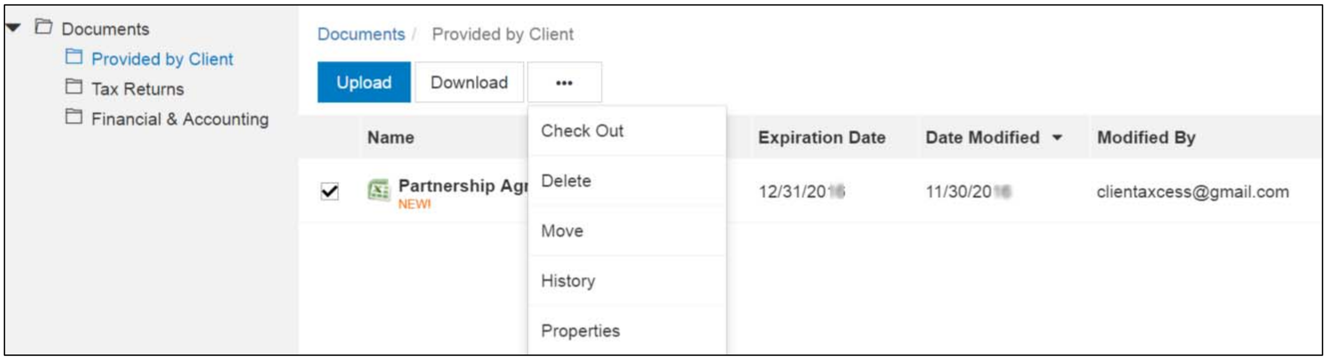

Figure 8

You can **not** delete files uploaded by Welgaard 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** button, and then choose **Delete**. You will be prompted for confirmation, click **Yes** to remove the file from Client Axcess.

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

Checking Out Files

Collaborate with Welgaard by using 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 your changes upon Check In.

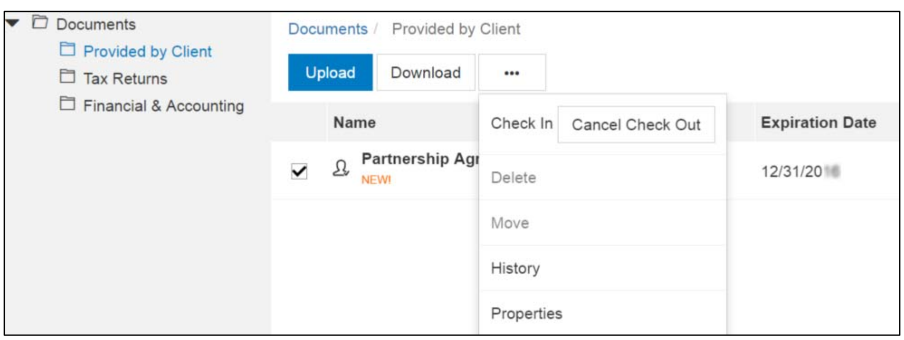

Figure 9

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

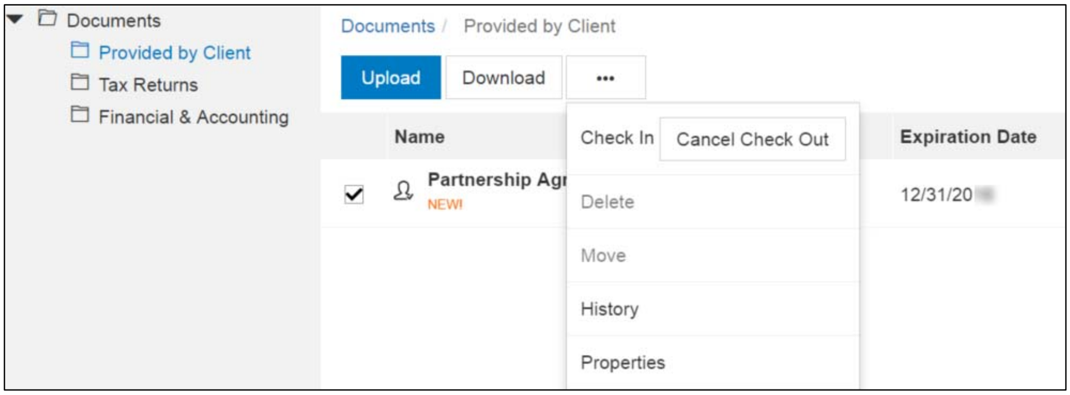

Figure 10

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**
6. You will receive confirmation the file has been checked in successfully

The Profile Menu

Click the drop-down menu at the top right to access user-level options.

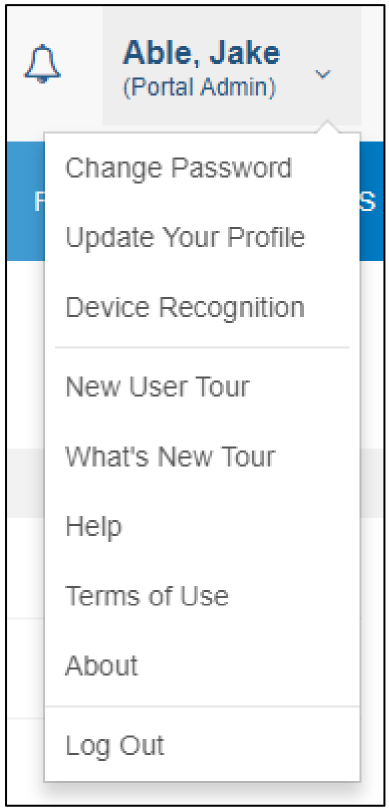

Figure 11

Profile Menu Key Features

Change Password	Change your password.
Update Your Profile	Update your name, email address, and other details
Device Recognition	A list of devices that your account has successfully logged in with.
New User Tour	Revisit the tour you originally viewed the first time you logged in.
What's New Tour	Revisit the tour that explains the latest upgrades to Client Axcess.
Help	Review the information on the frequently updated web-based help site.
About	Displays the version number and licensing terms.
Log Out	Securely log out of Client Axcess.

Close your browser or click your profile menu at the top right-hand portion of the screen, and select **Log Out** to exit Client Axcess.

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 Axcess portal.

Portal User Roles

Portal Admin

The Portal Admin is the primary user for each Client Axcess 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 Axcess Portal Users

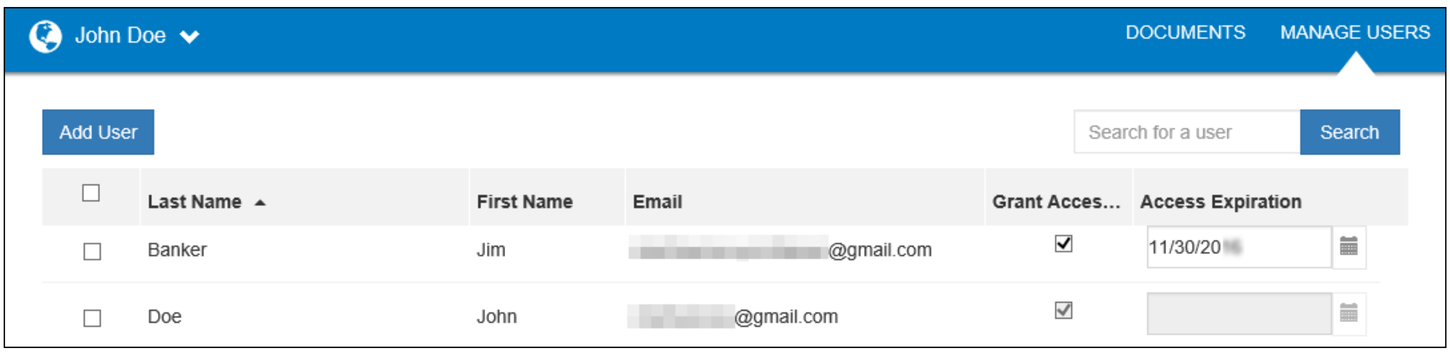

Figure 12

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

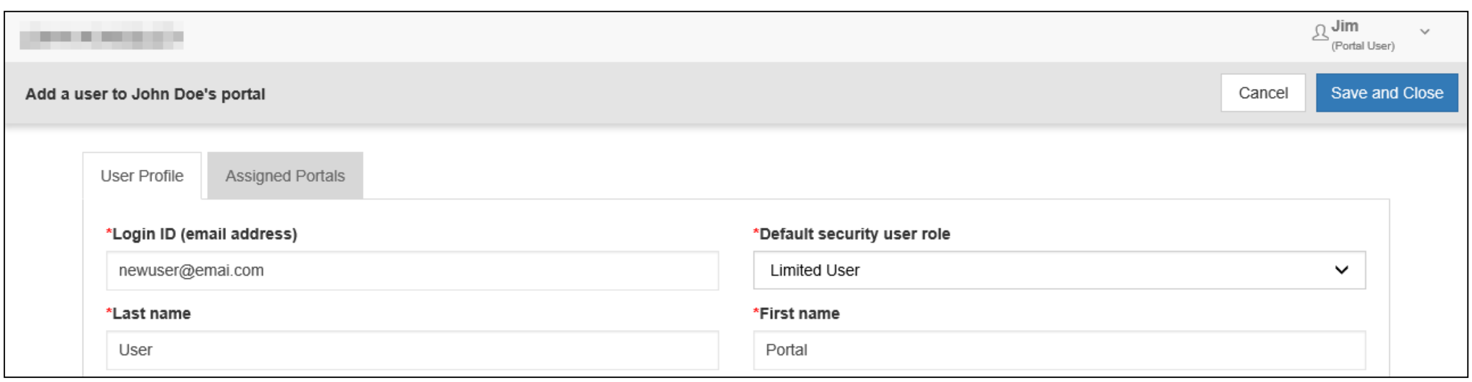

Figure 13

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

Create Client Axcess Portal Users Continued:

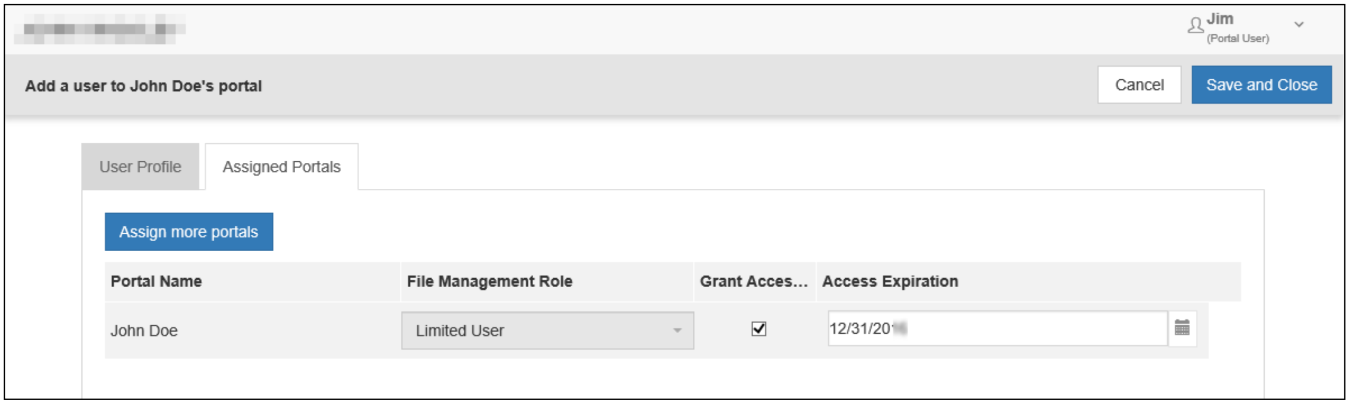

Figure 14

Assign a Portal User to a Client Axcess 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 Axcess Portal Users

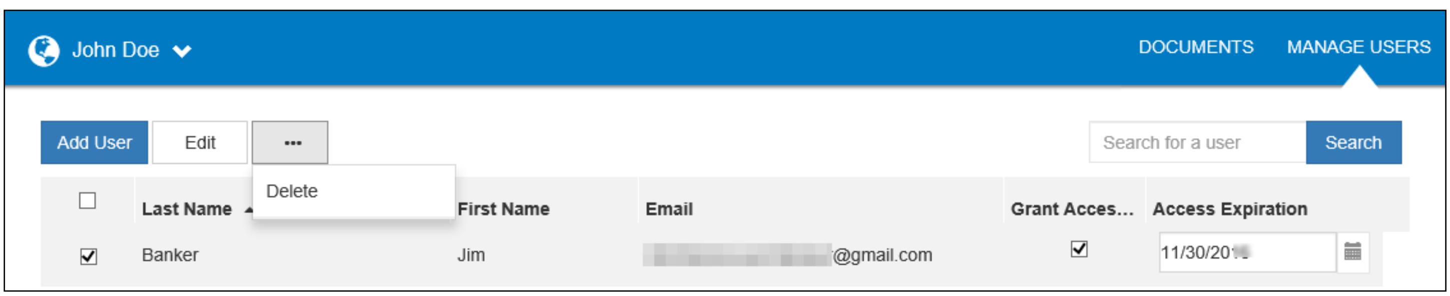

Figure 15

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** 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 [firm name].

Working with Folders

Custom Folders (delete this section if your firm licenses Integrated Portal)

The Portal Admin can create, rename and delete custom folders as needed for special purposes.

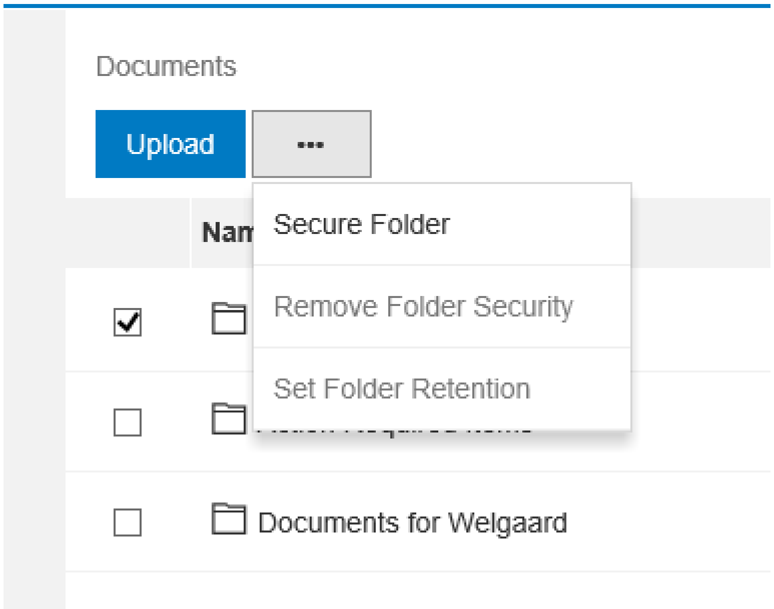

Figure 16

To create a custom folder, select the **More options** button and click **Create Custom Folder**. In the window that appears, provide a name for the custom folder.

Figure 17

To rename or delete the custom folder, select it by checking the box for it and then click the **More options** button to make your selection.

Securing Folders

If needed, the Portal Admin can limit which files are visible to Portal Users at the folder level by using the **Secure Folder** feature. When folder security has been applied, the folder is only visible to those with access to the folder.

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**.

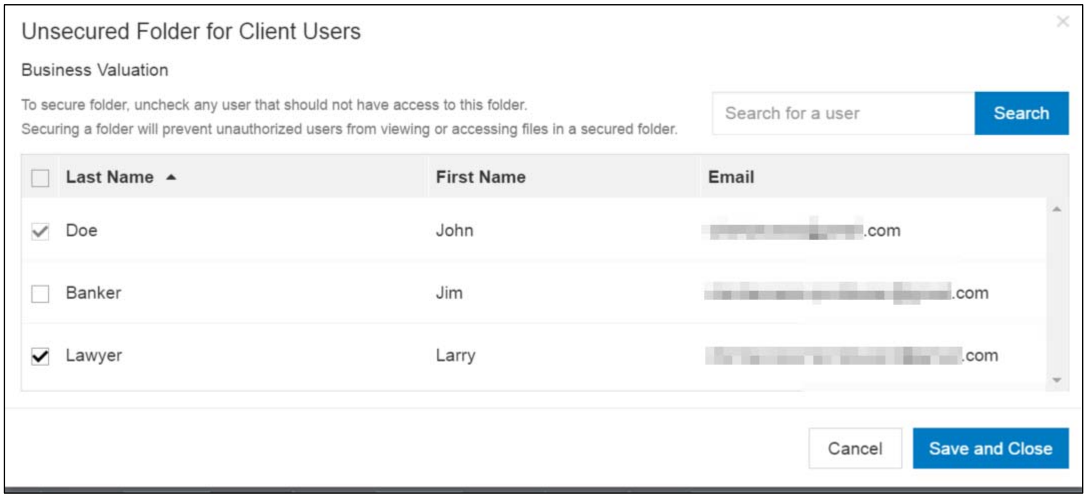

Figure 18

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**, and 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 19

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