



to

CCH Client Access™
Portal
USER GUIDE



PRITCHARD, BIELER, GRUVER & WILLISON, P.C.

Icon Legend



Tips Best practice tips and shortcuts



Notes Informational notes about functions



Warning Important warnings about a function

CCH Client Access

<https://www.clientaccess.com>

CCH Client Access allows you to receive and share files with Pritchard, Bieler, Gruver & Willison, P.C. from any web browser or operating system.



CCH Client Access can be accessed via the web URL (see above), or by downloading the free mobile app. Search “CCH Client Access” in the Apple® App Store or the Google® Play Store.

Logging in to Client Access

Login using the URL listed above or via the mobile app. Refer to your welcome email for the temporary password needed for your initial login to Client Access.

Welcome!

User ID
Enter your user ID

Password
Enter your password

Save User ID

[Forgot password?](#)

Log In

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V 2.8

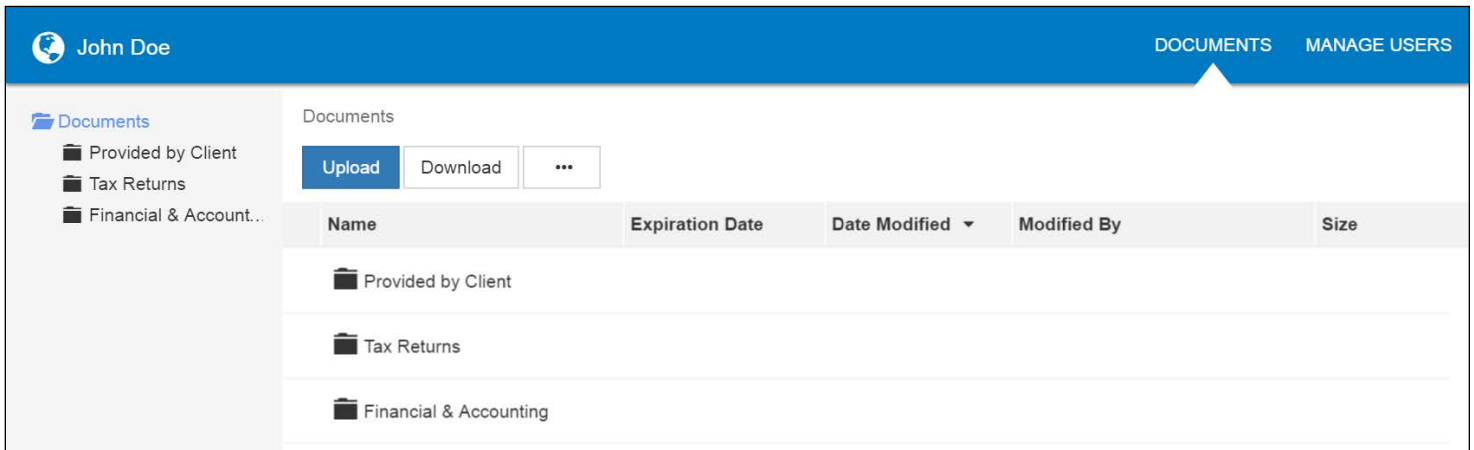
Login



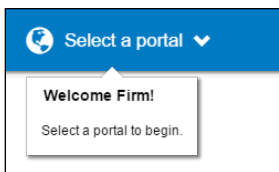
Login Tips

- 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 “**I Forgot My Password?**”.

Downloading files from Client Access



Client Access Home Page



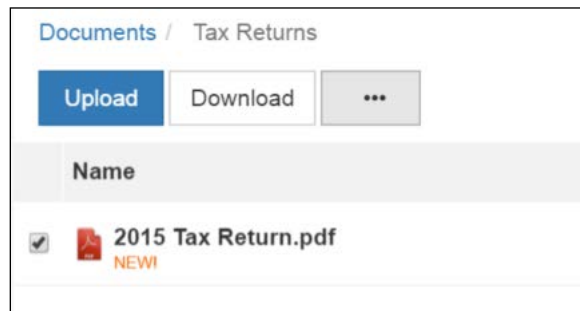
Select a portal



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



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.**



Download Files

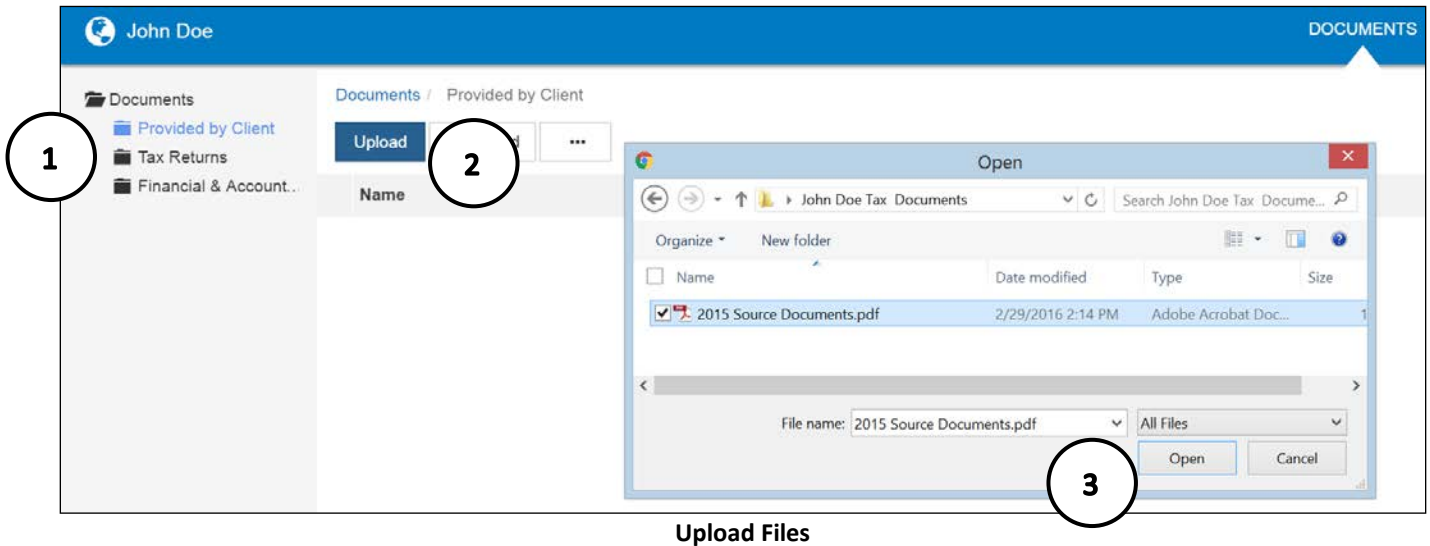


To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser's file download prompt allowing you to open or save the file. You can download one or multiple files at a time.



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

Uploading files to Client Access

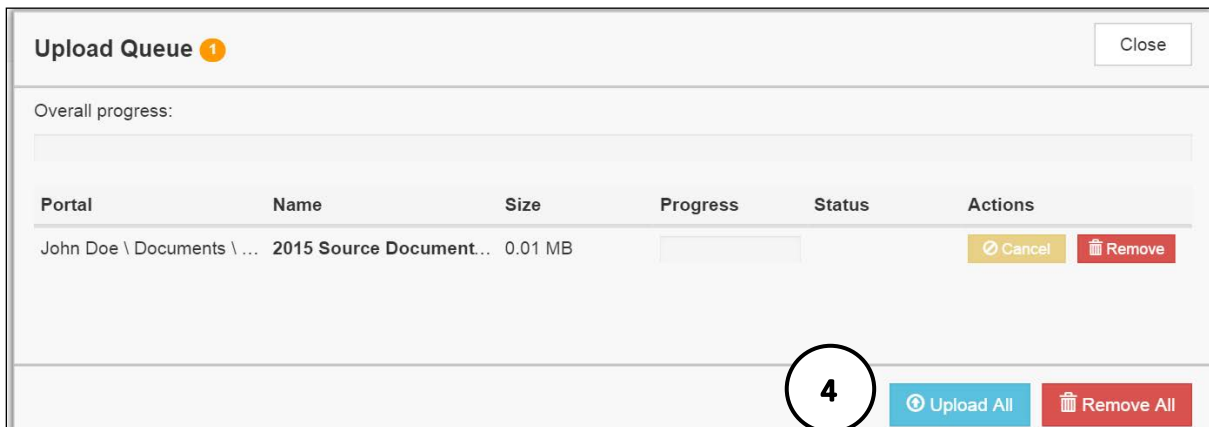


Upload Files



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

4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access. An email notification is sent to Pritchard, Bieler, Gruver & Willison, P.C..




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.



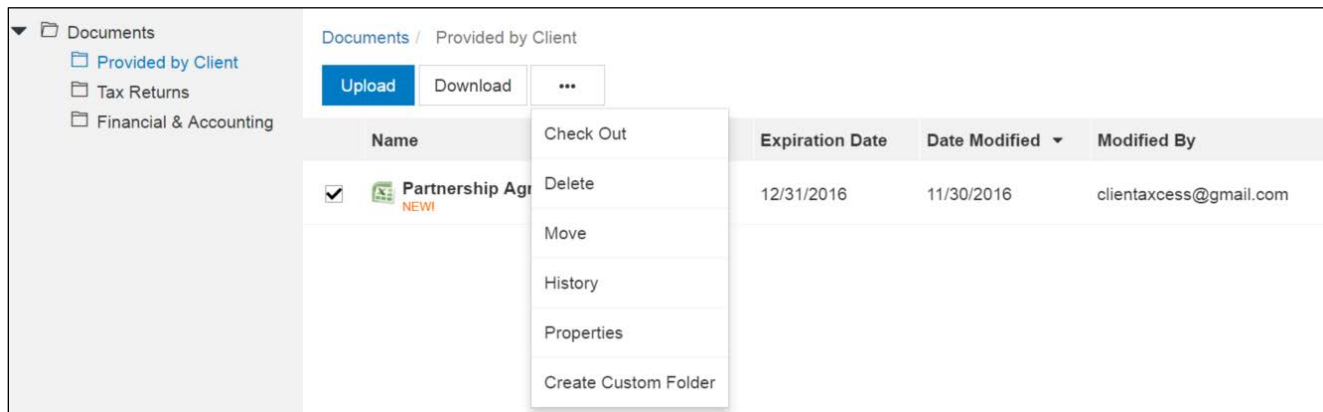
You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Access.



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



Delete Files



You can **not** delete files uploaded by Pritchard, Bieler, Gruver & Willison, P.C. 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 Access.

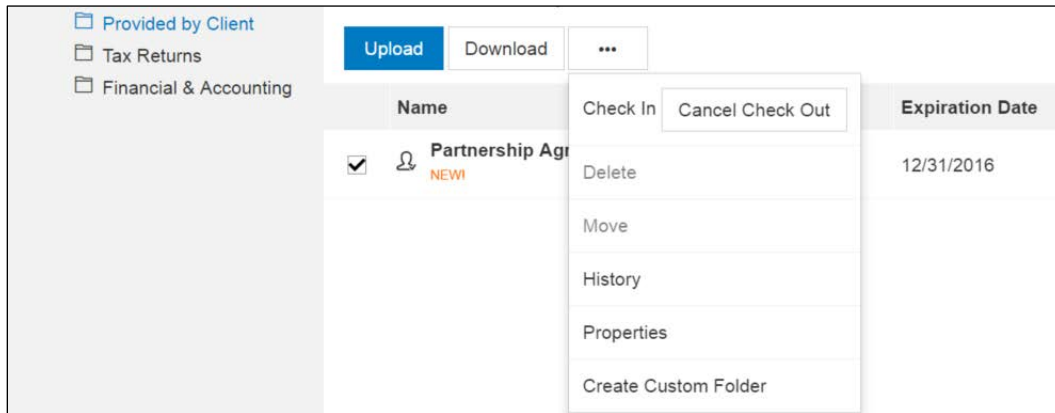


If you would like to have a file added by Pritchard, Bieler, Gruver & Willison, P.C. or another portal user removed from Client Access, follow the steps above, but choose the option “**Request for Deletion**”, which will be displayed instead of the Delete, and will email to Pritchard, Bieler, Gruver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

Working with Files in Client Access

Checking Out Files

Collaborate with Pritchard, Bieler, Gruver & Willison, P.C. 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.



Check out a file

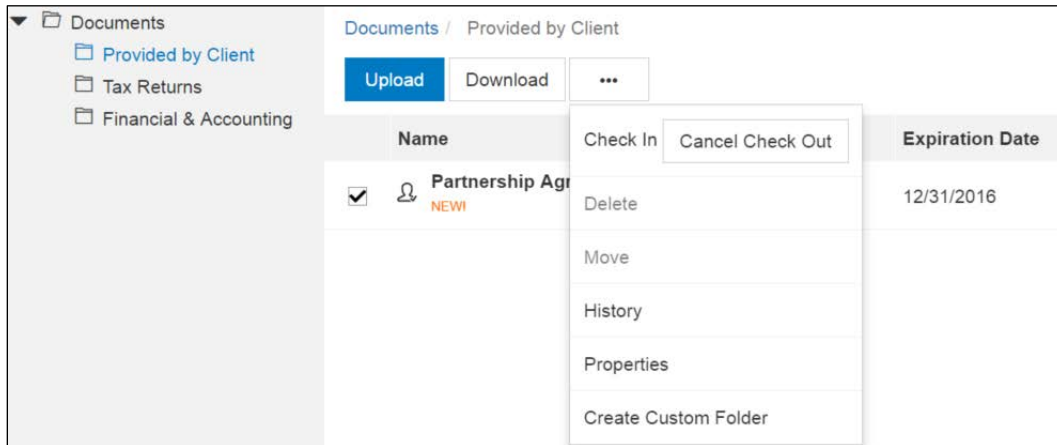


Steps to Check Out a file

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

Working with Files in Client Access

Checking in Files



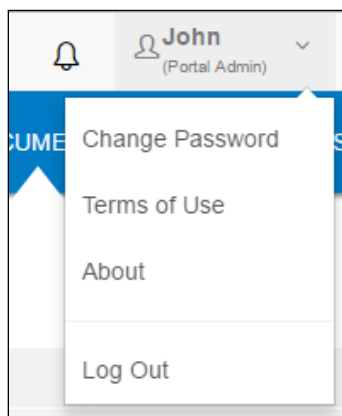
Check in a file



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** 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 you have access to more than one portal, you will be able to control which portal(s) your banker or other third party may view.
- You may also apply security level permissions to folders. 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 this, there is an 'Add User' button and a search bar. A table lists existing users with columns for selection, Last Name, First Name, Email, Grant Access..., and Access Expiration.

<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. It has a 'Cancel' button and a 'Save and Close' button. The form is divided into two tabs: 'User Profile' and 'Assigned Portals'. The 'User Profile' tab is active and contains four required fields: Login ID (email address), Last name, Default security user role, and First name.

*Login ID (email address)	*Default security user role
<input type="text" value="newuser@email.com"/>	<input type="text" value="Limited User"/>
*Last name	*First name
<input type="text" value="User"/>	<input type="text" 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** button to delete the user, or click the **Edit** button to modify.



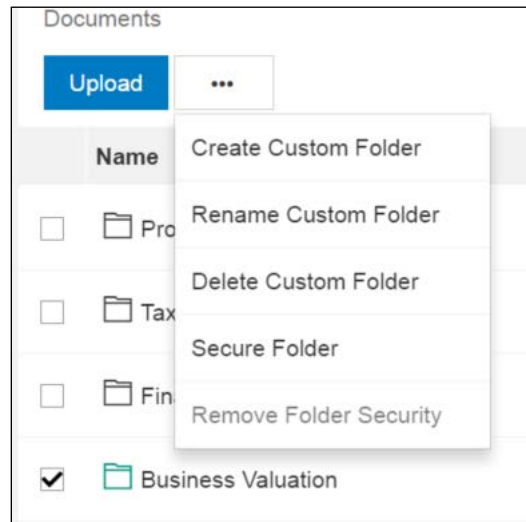
It is important to terminate access when no longer needed by the Portal User. If you need assistance please contact Pritchard, Bieler, Gruver & Willison, P.C..

Working with Folders

In many cases, the default folders provided by Pritchard, Bieler, Gruver & Willison, P.C. 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 applying folder level security.

Securing Folders

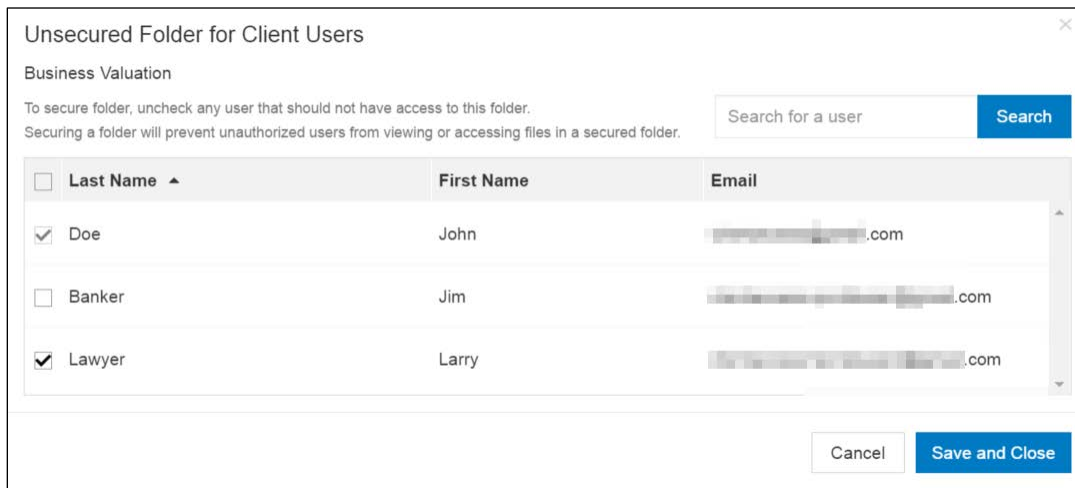
If needed, the Portal Admin can limit which files are visible to Portal Users at the folder level by using the **Secure Folder** feature. Folder security can be applied to both default and custom folders and subfolders. When folder security has been applied, the folder is only visible to those with access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



Secure 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**.



Apply Folder Security to Portal Users



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**.



Secured Folder

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