Wolters Kluwer
CCH

CCH Axcess™ Document

Welcome to CCH Axcess Document Release 2014-3.5

This bulletin provides important information about the 2014-3.5 release of CCH Axcess Document. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 3. Additional information is available on CCH Support Online.

New in this Release

Entity ID Added to Entity Tree in Document Central

A new user option now allows you to configure how entities display in the Document Central navigation pane. You can choose to show the Client ID/Entity ID in addition to the Client/Entity Name. Options include showing the Sort Name only (current functionality), Sort Name + ID (new default option), ID + Sort Name, or ID only.

Drag and Drop - Highlight Drop Folder

When dragging a file over a folder in Document Central, the folder in focus will now be highlighted to indicate that files will be placed there when you release the mouse button. You no longer have to guess if you are dropping a file on the correct folder location.

Office Plug-in Credential Security

Office Plug-in credentials are now stored using stronger encryption to better protect data stored in Document. As an added level of security, you must now opt in to have your login password saved. The first time you open the Office applications after upgrading, you will be prompted to enter your login credentials. If you select the new Remember Password check box, you will not have to enter your credentials every time you use the plug-ins.

Technical Corrections in this Release

File Remained Checked Out When Excel Was Closed If the File Was Opened from Excel Plug-in

Customers reported that if an Excel file was opened from the plug-in, and then Excel was closed, the file did not check in. With this release, Excel files opened from the plug-in successfully check in upon closing Excel and the file.

File Properties No Longer Showed the Closed Workstream Project after Changing Subclass on a File

Customers reported that if a file was linked to a closed Workstream project, and then the subclass for the file was changed, the Workstream project no longer displayed in File Properties. With this release, the Workstream project continues to display after changing the subclass.

When Publishing to Portal, You Can Now Add Multiple Paragraphs to Comments

You can now press Enter to start a new paragraph while entering comments for a file you are publishing to Portal from Document.

Error Received When Deleting a Class

Customers reported receiving "An error occurred while performing FileClass delete" error message when deleting a class, even though no files were associated with the class. This issue is resolved in this release.

Folder Template Could Not Be Organized If the Cut-Off Year Was Changed to an Earlier Year

Customers reported that they were unable to rearrange the folders in a folder template, if the cut-off year was changed to an earlier year. This fix will prevent this issue from happening in the future. However, if current folder templates are already affected, please contact Customer Support for assistance in reordering the folders.

After Installing the Latest Version of the Office Plug-ins, the Program Shows an Update Version Available in User Options

With this release, the Update option will no longer display when you are using the latest version of the plug-ins.

Portal Conversion Utility Rollback Failures

An error that prevented failed Portal Conversions from rolling back properly has been resolved.

Scheduled File Exports Not Running According to Their Schedule

File exports were not running according to schedule when an end date was selected. Also, if no end date was selected, the system automatically added the following day's date, which prevented the scheduled export from running. Both of these issues have been resolved in this release.

Improved Service-to-Service Communications

Communications between Document and Portal have been improved when the two modules are integrated. These changes will limit errors in Document that can result when Document cannot reach a Portal server.