Wolters Kluwer CCH

Release 2014-4.0
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CCH Axcess Document

Welcome to CCH Axcess Document Release 2014-4.0

This bulletin provides important information about the 2014-4.0 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

Share Safe

Share Safe is a new feature that allows firm users to quickly and securely exchange one-off files with clients or other approved third parties, without requiring the use of a client portal. Files stored in Share Safe are stored temporarily for up to 30 days before they are purged. Email notifications provide clients with instructions for receiving sent files or submitting requested files to the firm. Clients do not need credentials to use Share Safe. Instead they must use a file-specific access key sent via email to access files sent by the firm.

- **Firm-Customizable Share Safe URL** – Your firm can customize the URL your clients use to send or receive files. By default, the URL is https://www.clientaxcess.com/sharesafe/#/{CCH Account Number}. You can replace the account number with any valid alphanumeric value of up to 48 characters in length. The firm administrator can change the URL by selecting the new Share Safe option in Document Central's button bar. We recommend changing the customizable portion of the URL to represent your firm's brand. You can also add a link or button to your firm's website that opens this URL for easy access for clients.

  Note: We recommend changing this URL immediately, before sending files or sharing the URL with clients or third parties. Once changed, the URL cannot be reset to the account number.

- **Outlook Plug-in** – The Document plug-in to Outlook now includes options to send or request files securely through Share Safe. After composing an email to the recipient, select the **CCH Axcess tab** and then select the applicable button to send or receive files. When sending new emails or forwarding or replying to existing emails, you can attach files from your workstation or network location using Outlook's built-in attachment functionality. You can also attach files from Document using the button in the ribbon. The attached files are extracted when you click the Outlook Send button, and then encrypted and saved to your Share Safe temporary storage until they expire. Links to the files in Share Safe are sent to the recipient in an email, along with instructions to download the files. A second email is sent with the access key. You can define the access key or allow the system to generate and send a random access key.

  Share Safe also has an option to not send an access key. You can use this option if you share the access key in person or over the telephone. Sharing the access key in this way can add security since the access key is never sent via email.

- **Share Safe Website** – Clients access the Share Safe website using the firm's custom Share Safe URL. After providing an email address, their name, and, optionally, company and telephone number, a client can select to either Send or Download files. Clients must provide the file access key they received via email before they can view or download files sent to them by the firm. To send a file, clients select a firm user to receive the file from a list, and then enter a subject and a message to the firm user. They then can add attachments by browsing or by dragging and dropping files. When a client clicks the Send button, an email notification is sent to the selected firm user.

- **Incoming Files Grid in Document Central** – The Pending Approval tab in Document has been renamed "Incoming Files" to reflect its new functionality. If Document is integrated with Portal, then a split-screen view displays incoming files from Portal in the upper grid and incoming files from Share Safe in the lower grid. You can move files from Share Safe storage to Document storage using the Add Files button or by dragging and dropping files to a storage folder in Document's left nav bar. The client and storage folder are automatically selected for you. You can also preview, download, or delete files sent to you from Share Safe. As with any other files saved to Document, you can also publish these files to Portal when integrated with Document.

- **View Filters** – Firm users can view files sent to other firm users using the view filter. This is useful when a firm user is out of the office or otherwise unavailable to receive files. Additionally, firm users can view files that are set to expire within five days.

Engagement Integration with Standalone Portal and Document

When both Document and Portal are licensed, but not yet integrated, Engagement does not currently display the Publish to Portal options. Beginning with Engagement version 7.2, Engagement will now show both Document and Portal options, regardless of which is licensed or installed. If the Portal Conversion Utility has not been run and the Portal account is still operating in Standalone mode, you can choose between publishing to Portal or saving to Document. Users must provide proper login credentials for the selected product. Firms using Portal integrated with Document still must save to Document and publish to Portal at the same time; they cannot publish directly to Portal.

Technical Corrections in this Release

Users Receive Error When Opening Document after the 2014-3.5 Upgrade

After the 2014-3.5 release, some firm users reported receiving "Unexpected error occurred in the database server" errors. This error was caused by duplicate entries in the database and has been resolved with this release.

Some Integrated Portal Reports Returning Blank Results

Some customers reported that when they ran the Portal Users Never Logged In report or the Uploaded and Checked-in Files report, they received blank results. This issue has been resolved in this release.

Error Received when Saving from Excel Plug-in

Some customers received an error when saving Excel files opened using the Excel plug-in, and the file remained in checked out status. This issue has been resolved in this release.