

# CCH Access Document

## Welcome to CCH Access™ Document 2015-5.0

This bulletin provides important information about the 2015-5.0 release of CCH Access Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

## New in this Release

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### Open CCH Access™ Workstream Route Sheet from Document

In the 2015-3.4 release, we added the ability to add a Workstream Project column to most file grids in Document, plus the Recently Accessed Files and Entity File Lookup panes on the Dashboard. With this release, the Workstream Project column now shows projects as hyperlinks. Selecting a hyperlink will open the route sheet for the Workstream project linked to the file. Additionally, a new file context menu option has also been added, which will allow you to open the route sheet even if the project column isn't being displayed.

### Completed CCH Access™ Workstream Projects No Longer Show on the Add Files Screen

When adding files to Document, the Workstream Project field on the Add Files Screen no longer includes completed Workstream projects so that you do not have as many projects to look through. You can still link a file to a completed project by editing the file's properties or by linking the file through the Workstream Linked Documents tab on the Project screen.

### Add Files Screen Retains File Properties (Metadata) When Changing Entities

When adding groups of similar files for multiple clients, the Add Files screen now retains the file properties or metadata you've selected even when you switch clients or entities, unless that property value is not valid or available for the newly-selected entity.

- The following metadata fields are retained when changing entities: Storage Folder, Class, Subclass, Document type, Year, Sensitivity Level, Keywords, Permanent, Archive, Publish to Portal, Portal Edit Mode, and Portal Storage Folder.
- Workstream Project is not retained and would need to be set for each file.
- If the class/subclass or sensitivity level is not available for the newly selected entity, those fields will be cleared and you will be required to select from the available values for the selected entity.
- Default metadata for a selected folder will override the retained metadata.
- The Storage Folder and Portal Storage Folder are retained only if both entities have the same folder templates, otherwise the storage folder will reset to "Root" by default, but you can select a different folder.
- Changing Entity Types (client, staff, office, etc.) or closing the Add Files screen will both result in clearing the metadata.

### New File Retention Calculation Method: Based on Upload Date instead of "Year"

Document's file retention has historically been calculated based on the retention assigned to the class or subclass in conjunction with the assigned "Year" (metadata) and the upload month and day.

A new option has been added allowing the default firm administrator to configure Document's file retention to be based on the Upload Date without regard to the "Year" metadata field. When configured in this way, the expiration date for newly-added files will be calculated by taking the date the file was uploaded and adding the retention period associated with the class/subclass assigned to the file. For

example, a file uploaded on January 16, 2017 assigned to a class with a 7-year retention, would expire on January 16, 2024 - seven years after it was uploaded.

**Note:** When changing your firm's file retention calculation method, you can apply the change to both new and existing files moving forward or you can apply the change to only new files moving forward. Either way, be sure to update your firm's written records retention policy and make note of the change in policy.

#### **Updating the "Year" Metadata Field Now Updates the File's Retention Period**

When Document's File Retention Calculation Method is configured to be based on the "Year", if you change the "Year" on the File Properties screen, the retention period will now automatically update based on the new "Year" assignment.

#### **Adobe® Acrobat® DC (Document Cloud) Compatibility**

The Document plug-in for Adobe® Acrobat® now supports Adobe® Acrobat® DC (Document Cloud). Acrobat 9 and 10 are no longer supported, but may continue to work.

## **Fixed in this Release**

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### **Document**

The following have been fixed in this release of Document:

- After the last release, customers reported that if the Local Routing Queue was started before launching any CCH Axxess module, the login screen would hang and the user could not log in. (153694)
- Document Advanced Search produced a blank error message when searching by Project ID. This field is not currently exposed by Workstream, so the Project ID criteria option has been removed from the Advanced Search screen. (23212)
- An "Unexpected error occurred in the database server" message was displaying when user view the File Activity Archive report. (156729)
- In the Integrated Portal, firm administrators were unable to remove inactive users from portals when removing all staff. (155014)

### **Microsoft® Office® Plug-ins and Share Safe**

The following have been fixed for the CCH Axxess Document plug-ins to Microsoft® Office®:

- When using the Office plug-ins to open a client-uploaded file that was pending approval, the user was prompted to open a read-only copy of the file, but the status of the file was shown as blank. (88726)
- When replying to a message that had already been sent in Share Safe, the Outlook plugin failed to insert the Share Safe message and update the previously-sent message. (150617)
- Some browsers added hyphens or underscores in front of the file name and at the end of file extensions when clients downloaded files from Share Safe, preventing the files from being used unless renamed. (155086)
- Email addresses with two-character top-level domains (e.g., [user@test.do](mailto:user@test.do)) are now supported in Share Safe. (144124)
- Email addresses which started with numbers in the local-part or domain name (e.g., [77gina@gmail.com](mailto:77gina@gmail.com), [user@123abc.com](mailto:user@123abc.com), or [user@123.com](mailto:user@123.com)) are now supported in Share Safe. (138724)
- Email addresses which contain sub-domains (e.g., [user@nyc.rr.com](mailto:user@nyc.rr.com)) are now supported in Share Safe. (142223)
- When the same filename is sent multiple times through Share Safe to the same recipient, the user was previously unable to download the file. With this release, both files can now be downloaded successfully. (155689)