CCH Axcess™ Document

Welcome to CCH Axcess Document 2019-4.1

This bulletin provides important information about the 2019-4.1 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Document Storage Platform
With this release, the Document Storage Platform is now available. Document Storage Platform enables your firm to choose whether Document's Managed Storage should be stored in the cloud or on local firm hosted storage. The firm-hosted storage is maintained by the firm, either physically housed on a central server at the firm, or on individual servers in each office or a third-party IT provider.

Document Storage Platform also provides an option to add local firm-hosted extended storage. Extended storage is an area to upload complex file types that cannot be uploaded to Document. For example, CaseWare® files, QuickBooks® files, and linked Microsoft® Excel® spreadsheets are often in extended storage. Detailed information is available in the help topic About the Document Storage Platform.

To watch a video about setting up the platform, see the knowledge base article How do I set up the Document Storage Platform for CCH Axcess Document?

Class and Subclass Email Notification
You can choose to be notified when an update for an existing class or subclass has completed. After updating a class or subclass, select the check box on the message to receive an email after the update has completed. An email is sent to the user who initiated the change.

If an update does not complete, the user who initiated the change automatically receives an email notification. No action is needed to trigger this email.

Updated Terms of Use
All users must accept modified terms of use the first time they log in. These terms may be accepted during login to any one of the following:

- CCH Axcess products that are installed on your computer.

- Web sites that include cchaxcess.com in the address, such as collaboration.cchaxcess.com, financialprep.cchaxcess.com, and knowledgecoach.cchaxcess.com

- Third-party applications using Open Integration Platform Token Authentication.

CCH Axcess users who attempt to log in to some third-party applications using Ouath 2.0 Preview APIs will receive an error message until terms are accepted during one of the login methods described above.

User Phone Number Prompt During Login
To prepare for IRS mandates regarding 2-step verification, a phone number is now required for all users if your firm uses the CCH Axcess login method. This change does not affect firms using Active Directory or Federation Services to log in.

After a user enters their password and completes 2-step verification, if the phone numbers on the staff profile are empty, CCH Axcess prompts the user to enter a direct phone number. The user must verify the phone number by either:

- Entering a code sent by SMS text message

- Pressing # after answering an automated call

After verification, the new phone number is saved to the business phone on the staff profile.

This feature allows users to enter and verify a phone number in their own staff profile, even if they don't have permission to edit staff profiles. The behavior and permissions for managing phone numbers in Staff Manager and Open Integration Platform are unchanged.

Secure Connections During Active Directory Sync
As previously announced, this release updates the connection used for Active Directory sync from standard to secure. If your domain supports a secure connection, then no action is required. If necessary, you may downgrade to a standard connection. This change does not apply if your firm uses the CCH Axcess login method or a custom staff synchronization solution.

Replace Federation Services Secondary Certificate
If your firm is using the Federation Services login method, it is important to have a secondary token signing certificate to ensure uninterrupted use of CCH Axcess when the primary certificate expires. Previously, you were required to repeat pilot mode, metadata upload, and other steps. Now, you may add or replace the secondary certificate without these other steps.

Client Access Group Limit
CCH Axcess allows up to 1,000 client access groups per account. If more than 1,000 groups exist, the software will not allow new groups until the number of groups is reduced below the limit.

Technical Corrections

Return Group can be changed Client APIs
Previously, the return group field was not used when it was included in the Open Integration Platform client APIs used to add or modify clients. Now, the return group is saved when a client is created or modified.