

CCH Axxess™ Document

Welcome to CCH Axxess Document 2020-4.1

This bulletin provides important information about the 2020-4.1 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

Managing Portal Firm Users

To assist larger firms with multiple offices, a new office filter makes it easier to select firm users who have access to a client's portal. The office filter defaults to the client's office; you will only see staff for the selected office. This option applies only to customers who are licensed for Integrated Portal.

To select the staff members who have access to a client's portal, do the following:

1. Open Dashboard, click **Application Links** on the navigation panel, and then click **Client Manager** under Clients.
2. Open the client.
3. Click **Portal** in the navigation panel.
4. In the Portal firm user access list section, click **Select users**.

File List Pagination

The number of files that can be displayed at one time has been increased to 2000. The number of files defaults to 500. The File List retains your pagination selection from your last logged-in session.

Technical Corrections

Share Safe

Share Safe now sends attached files as expected.

Favorites

Clicking on a file saved as a Favorite now displays just that file. The folder and all its contents do not display.

Folders

Folders now display as expected on Document Central's left navigation pane.

Modified By Column

Clicking the Modified By column no longer causes that column to show as blank.