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CCH Axcess™ Document

Welcome to CCH Axcess Document 2021-5.0

This bulletin provides important information about the 2021-5.0 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

Favorites
With this release, you can now sort your favorites in ascending or descending order and search them with a new search bar. Any files, folders, and entities added to your favorites will be searched.

Distributed Storage Platform
With this release, an update is required for any Distributed Storage Platform server(s) you have enabled. Log into the machine(s) where Distributed Storage Platform is enabled. Click Install and Update Manager > Redirect to Update Tab > Check the Distributed Storage Platform checkbox > Click the Update button.

Share Safe
To assist your clients when using Share Safe, a new search bar has been added to the staff field. To easily find a staff user, type the name of the staff in the search filter.

Entity ID Column
A new Entity ID column has been added to the Incoming Files tab. The new column will display the Entity ID associated with the files. This option applies only to customers who are licensed for Integrated Portal.

Portal Retention Report
A new Portal Retention report is now available under Portal Reports. The retention report provides a list of all portals and their expiration settings. This option applies only to customers who are licensed for Integrated Portal.

Collaboration Storage Email Notification
A new Collaboration Storage Email Notification is available with this release. When enabled, a notification email will be sent to the selected recipients when your portal storage reaches 80% and 90% of its storage capacity. Click Managing Portal Email Notifications to configure the Collaboration Storage Email Notification. This option applies only to customers who are licensed for Integrated Portal.

Install/Update
When you start CCH Axcess, you are prompted to apply updates if they were not applied automatically. Occasionally, you may need to uninstall and reinstall CCH Axcess, which can require assistance from your firm IT department. With this release, after updating Install and Update Manager:

- You can reinstall the CCH Axcess components that are already present, even if you are not an administrator on your computer. For more details, please refer to our guide When should I use the reinstall button in CCH Axcess?

- You will be prompted to reinstall if one of the installed products has four or more updates pending.

Developer Portal
The Developer Portal has been enhanced to provide new titles and descriptions for the API services. These descriptions should provide better information on what functionality is available in each service at a high level. There are also tags added to the Staff API operations to enable grouping in the API operation list. These tags can be seen by turning on the tag function at the top of the API operation list.

Technical Corrections

Incoming Files
The Newest File Date column is now sorting ascending and descending order correctly.