CCH Axcess™ Document and Integrated Portal

Welcome to CCH Axcess Document 2023-3.4 and Integrated Portal

This bulletin provides important information about the 2023-3.4 release of CCH Axcess™ Document and Integrated Portal. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

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.

Asynchronous File Processing
With this release, we are introducing asynchronous file processing for direct editing, check-out, and check-in processes in CCH Axcess Document for files 100MB and larger. This allows users to seamlessly continue working within the application while large file operations are in progress. Please note that CCH Axcess Document must remain open until the processing is complete.

Share Safe Emails
The order in which Share Safe emails are sent has been reversed, with the authentication email now being received second. The phrase "The email will be from DoNotReply@CCH.com," has been added to inform users that the 2-Step Verification email will be coming from this address.

Portal Usage Report
A new "All" option has been added to the Portal Usage report. To manage the large amount of data that can be included when running the report for "All," we have implemented a direct export to a CSV file. Please note that running the report for "All" can only be done in year or less periods due to the volume of data it can include. This option applies only to customers who are licensed for Integrated Portal.

Portal Client Area
Due to lack of use the Portal Client Area has been removed. The client area was an optional storage area that firms could provide to clients to upload their files. Files in the client area can only be viewed by clients. This option applies only to customers who are licensed for Integrated Portal.

Technical Corrections

Publish File to Portal Email
The issue where email text was cut off after 180 characters has been resolved.

Large File Routing Errors
The issue where large files were encountering the error message "Failed to route file. Please retry." has been resolved.