Release 2023-5.0
October 2024

CCH Axcess™ Document and Integrated Portal

Welcome to CCH Axcess Document 2023-5.0 and Integrated Portal

This bulletin provides important information about the 2023-5.0 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

CCH Axcess Common
CCH Axcess SSO has been enhanced for security and to ensure IRS compliance. Users can now easily modify, add, or delete phone numbers for 2-Step Verification, offering more control over the multi-factor options. The CCH Axcess active session timeout will be shortened from 24 hours to 12 hours to align with compliance standards and safeguard user accounts.

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.

Advanced Search — File Size
A new advanced search option, File Size, has been added. This feature will help you easily identify large files that are consuming significant amounts of storage space and allow you to locate files more efficiently based on their size.

Advanced Search — Checked Out Staff
A new "ALL-staff*" option has been added to the Check Out Staff Advanced Search field. This enhancement allows you to search checked out files across all entities you have access to.

Recent Entities
In this release, we have increased the number of recent displayed entities from 30 to 50. This enhancement provides more comprehensive access to recent data, improving overall usability and efficiency.

Combine PDF Files
We are excited to announce that you can now combine, upload, and organize PDFs in CCH Axcess Document. With this new feature, you users can easily merge two or more PDFs into a single file, upload and combine new PDFs with existing ones, reorder pages, and rename combined files. Once you've made your edits have been made, the merged PDFs back to Document, enhancing your workflow and file management experience.

Integration with CCH Axcess™ Collaboration
With this release, you can send signed engagement letter(s) and tax return(s) from the Client Collaboration dashboard to Document.

To access this feature from Client Collaboration, navigate to the Request Dashboard => Request status list (by clicking a status wedge in the pie chart or a status name). Here, you will find the "Send to Document" icon in the Engagement Letter and Delivery status columns when signatures have been received. This option will open the Document "Add files" screen where you can assign metadata to files and upload them to Document. The "Send to Document" icon becomes available only after the engagement letter or tax return is signed. At this time, files sent from CCH Axcess Client Collaboration cannot be saved directly to local or extended storage. Instead, please download the files

from Client Collaboration and manually add them to CCH Axcess Document. This option only applies to firms who are licensed for CCH Axcess Collaboration.

Portal User-Never Logged In Report
Client sort name and Client ID and Sub-ID columns have been added the Portal User-Never Logged In Report. This option applies only to customers who are licensed for Integrated Portal.

Auto Approval of Incoming Files
With this release, there is a new firm configurable File Auto Approve feature designed to streamline the approval process for files received from customers. To set it up, you will need to configure specific metadata settings, including the Default Folder, Default Class, and Default Subclass. This feature is turned off by default. To enable the File Auto Approval feature, open the Dashboard, click on Application Links in the navigation panel, select Settings and Defaults under Firm, and navigate to Document > Configurations > Auto Approve Incoming Files to toggle the setting to On. Additionally, remember to set your default metadata by accessing Document > File Auto Approve in the same menu. Please note that files missing the required metadata or marked for cancellation due to duplicates will not be auto-approved and will appear in the Incoming Files tab. Additionally, it may take an hour or longer for files to be automatically approved in CCH Axcess Document. If you need the file(s) approved immediately, you can manually approve them in the Incoming files tab. This feature only applies to customers who are licensed for Integrated Portal.

Published Files
A number of restrictions have been removed when using published files. You can now move or copy a published file within the same client. Additionally, you can modify the Class, Subclass, Document Type, Workstream Project, Keyword, and Year directly from the properties screen. This option applies only to customers who are licensed for Integrated Portal.