

CCH Access Document

Welcome to CCH Access Document 2013-1.0

This bulletin provides important information about the 2013-1.0 release of CCH Access Document. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 3. Additional information is available on CCH [Support Online](#).

Usability Improvements

Open Excel Workbooks in a New Instance of Excel

A new user option allows you to specify how you would like to handle direct editing or checking out and opening Excel workbooks. You can select to always open in a new instance, always open in the same instance, or prompt to open in a new instance or the current instance.

"20xx and Prior" Folder

Firms who have many years' worth of data or who migrated from Foundation Document have asked for the ability to hide the older year folders so that they do not take up so much room in the left navigation bar in Document. Now, your firm can select a "cut-off year" and Document will put that year and any older year folders in a "20xx and Prior" folder. You can easily change the cut-off year at any time. As the years pass, you can update the cut-off folder to hold more year folders.

Drag and Drop to the Desktop and Windows Explorer

You can now drag files from Document file lists and drop them on the Windows desktop or in Windows Explorer. You must have permission to download the file to use this feature.

Drafts Folder Organization

Previously, having several files checked out simultaneously made it difficult to determine which file belonged to a particular client. Now, when you check-out or direct edit a file, Document will create a folder for each client in the following location: My Documents > Drafts > {Client name} > {Template}. You should now be able to easily identify which files belong to a particular client, as well as the folder location of a file when viewed in Document. Files belonging to File Groups are also saved in a folder representing the File Group.

Third Party Software Compatibility

Office 2013 and Office 365 Compatibility

Document and the Document plug-ins to Microsoft Office now support 32-bit versions of Office 2013 and Office 365. To use Office 365, the Office applications must be installed on the user's workstation in order for the Office Plug-ins to be registered and enabled. Web apps and Streaming apps are not supported.

Note: There is a known issue that prevents users from previewing files in Document when using Office 365. This issue will be addressed in a future release.

Drag and Drop from Document to an Outlook Email Being Composed

You can now drag and drop files from Document file lists to an Outlook email being composed. This quickly attaches the file to the email without using Document encryption. You must have permission to download the file to use this feature.

Data Center Upgrades

Encryption at Rest

CCH Access Document has always protected your customer data using industry-standard encryption for all file uploads and downloads. Another layer of protection is being added by encrypting your customer data even when it's not being accessed.

Windows Server 2012 Compatibility

The servers on which the CCH Access platform runs are in the process of being upgraded to Windows Server 2012, which will provide you a more stable environment and support for future enhancements.

SQL Full-text Searching (SQL FTS)

Windows Server 2012 no longer supports the Microsoft Indexing Service, which was previously used to index the contents of files as they were added to Document so that their contents could be searched for in Document. CCH Access Document will now use SQL FTS for indexing and searching for contents of files added to Document. This change also provides more accurate search results, greater stability, and improved scalability.

Note: Due to a limitation in SQL Server 2008, you will be unable to perform "Contains" word searches and must only perform "Starts With" word searches. You will no longer be able to use Wildcards at the start of a word search (ex., *tax). SQL FTS will also allow for *future enhancements* to word searching in Document such as proximity searching, synonymous forms of a specific word, weighted terms, results ranking and more to overcome this limitation.

SQL Server 2012 Compatibility (Running in SQL 2008 Compatibility Mode)

The database servers on which the CCH Access platform runs are being upgraded to SQL Server 2012, which will support future capabilities.

Firm Administration

Update Spouse Name Format to be the same as the Client Name Format

When you update the format for Client Name, the Spouse Name format will also be updated to match.

Delete Client Associates

You now have the ability to delete Client Associates you no longer need.

Updated State and Country Code List

The state and country code lists have been updated.

Single and Batch Client Linking

Single and batch client linking now has an option for exact matching based on Federal ID.

Dashboard

Auto-arrange for Applications and Configurations Screens

The Applications and Configurations screens in Dashboard are now auto-arranged based on the size of your monitor or window to reduce unnecessary scrolling.

Increased Number of Recent Tasks

The Recent Tasks list in Dashboard now displays up to 5 recent tasks.

Dashboard Help

Added Dashboard Help links.

Install and Update Manager

Install Multiple Products Simultaneously

Now you can install one or more CCH Access product modules simultaneously for a simplified installation experience.

.NET 4.5 Framework Installed

If not already present prior to install, .NET 4.5 Framework will be installed automatically.

Future Updates after 2013-1.0 Installation

The auto-update option will include updates to Install/Update Manager for releases after 2013-1.0. If an update notification is received upon launch of CCH Access, a single click will start the update process.