CCH a Wolters Kluwer business

CCH Axcess Document

Release Bulletin

Release 2012-3.4.1

May 2013

Welcome to CCH Axcess Document 2012-3.4.1

This bulletin provides important information about the 2012-3.4.1 release of CCH Axcess Document. Please review this bulletin carefully. If you have any questions, please call Customer Support at 1-877-977-9739, Option 3. Additional information is available at CCH Support Online.

Usability Improvements

Default Folder Templates

Document now provides the ability to specify the default folder template for newly created clients. This is useful in the following scenarios:

- After migrating from Foundation Document, there are usually at least 2 folder templates for client entities: the Default Template that ships with CCH Axcess Document and the Primary Template from Foundation Document. You can now specify which template should be used when creating new clients.
- Firms that have multiple folder templates, depending on the type of client, can choose which template should be used as the default and then change it on an as-needed basis when creating new clients.

Save and Recall Document Central Window Settings

You are now able to configure the Document Central window the way you like it, and retain your settings upon exiting Document. The next time you launch Document Central, it will look just like it did when you closed it. The following settings will now be saved and retained for the next time you launch Document:

- Window Size and Location on the Screen
- Width of the Left Navigation Bar
- List Options (expanded or collapsed)
- Entity Sort Order (Alphabetical order or Last Accessed order)
- Entity type selection (Firm, Offices, Business Units, Clients, Staff, Non-Clients, Saved Searches, Favorites)
- Entity type selection buttons (you can now hide entity types your firm doesn't use, order the buttons should be displayed in)
    - Hide entities your firm doesn't use
    - Reorder the buttons
- Selected Client or Entity
- For all Document Central grids, the following settings are retained:
    - Columns displayed in the grid
    - Column display order
    - Column width
    - Column grouping
    - Column sorting

Hyperlinks for Files Stored in Document

You can now send a hyperlink for one or more files to other firm users through email, or you can copy the hyperlink(s) to the Windows clipboard and paste them into an email you are already composing, or anywhere else that text can be pasted from the clipboard. Firm users that have installed the Smart Client are able to click on the hyperlink and, choose to either download a read-only copy of the file or open the file in Direct Edit mode to make quick changes to the file. If the user is already logged into the Smart Client, they will not be prompted to log in again.

Improved Setup for File Level Permissions

File Level Permissions allow users with proper permissions to set up special file-level permissions to secure files or to grant access to a file which a user normally would not have access to. You can now setup permissions for multiple users or security groups' of users all at the same time. After selecting the users and/or security groups, you can select multiple users/groups by pressing **CTRL+Click** or **Shift+Click**. Additionally, there are now Allow All and Deny All checkboxes so that you can more quickly assign file-level permissions to users.

Clients Created Using the Client Import Utility are Now Available in Document

When you run the Client Import Utility to create clients en masse, those clients will now be made available in Document and the extended storage area folders will be created. You will no longer be required to add a file to the client or open/close the client profile before Extended Area folders will be created.

Success Messages Reduced

Document will no longer display the following success messages, allowing you to work with fewer interruptions. Error messages or other exception messages will still be displayed. Only '*success*' messages will be suppressed.

- File checked in successfully
- File downloaded successfully
- File checked out successfully
- File check out cancelled successfully
- File published successfully
- File unpublished successfully
- Published file recalled successfully
- File copied successfully
- File moved successfully
- File archived successfully
- File unarchived successfully
- File locked successfully
- File unlocked successfully
- File deleted successfully
- File restored successfully [from the recycle bin]

Client Notes on the Client Dashboard

Client notes are now available via the Client Dashboard. You can access and create client notes more efficiently using the Notes feature available via the Client Dashboard. This saves you multiple clicks and provides more transparent access to this information without requiring you to launch the Client Profile.

Search by Client ID and Sub-ID or Sort Name in Client Manager

Client Manager now allows you to search for a client by Client ID and Sub-ID (optional) and by Sort Name simultaneously without choosing a search option. If using both Client ID and Sub-ID, you can separate the IDs by entering a period between the ID and Sub-ID, for example, 14350.01. If you enter the full Client ID, Client ID.Sub-ID (if used) or Sort name when you perform the search, the client profile opens automatically.

Adding Clients to Access Groups

Client access groups now contain filters to assist you when searching for staff and clients to add to the group. This saves time and clicks involved when manually searching for and selecting staff and clients.

Integration Enhancements

Tax Returns Deleted from the Tax Export Folder when Printing Returns to Document

When a tax return is printed to Document from ProSystem *fx* Tax, the return will now be automatically deleted from the Tax export folder (X:\WFX32\Client\PDF, for example) when the file is copied to the Document Upload folder. It is recommended that all users clear out their Tax export folder after this upgrade to remove unwanted tax returns. If a file cannot be saved to the upload directory for some reason, it will remain in the export folder so that users will know that they failed.

Tax Mapping Support for All Document and Portal Folder Templates

The Document Tax Mapping screen now allows you to select the default storage folders for all client entity folder templates. This will allow your firm to auto-route tax returns to any client – regardless of the folder template used to create the client – without the Add Files displaying and without user intervention (if the clients are linked). If your firm uses Portal integrated with Document, you can also set the default publish folder for each Portal folder template.

Auto-Map Years in Tax Mapping Supports Prior Year Tax Returns

This new feature allows you to send prior year tax returns to Document. When enabled, tax returns will be automatically assigned the proper year and stored in the Year folder corresponding with the tax year of the return (2010 return will be stored in the 2010 Folder and the assigned year will also be 2010). If a corresponding Year folder does not exist in the folder template, the default Year and Storage folder specified on the Tax Mapping screen will be applied to the return instead.

Search by Client ID and Sub-ID in Client Manager

Client Manager now allows you to search for a client by client ID and sub-ID (optional) or by sort name simultaneously. You no longer have to choose a search option. If using both client ID and sub-ID, you can separate the IDs by entering a period between the ID and sub-ID, for example, 14350.01. If you enter the full client ID, client ID.sub-ID (if used), or Sort name when you perform the search, the client profile opens automatically.

Architectural Enhancements

Removed Permissions for Search, Dashboard Panes and Individual Reports

In an effort to improve performance and reduce unnecessary permissions, we have removed the following permissions, allowing all Document users access to the related functionality.

- **Search/Advanced Search/Saved Searches** - Users no longer require permission to search for files in Document or to save searches. Search will still only displays files for which the user has proper permissions to see. Access Groups are still used to secure selected clients and staff.
- **Dashboard Panes** - Users no longer require any permissions to add any of the following Document panes to the Dashboard:
    - Entity File Lookup
    - Recently Accessed Files
    - Files Pending Approval
    - Discussions
    - Checked Out Files
- **Individual Document Reports** - Prior to this release, there were separate permissions for each individual Document Report. Now, there is a single permission for Document Reports. If a user has been granted the Document Reports permission, then he/she will have the ability to run any of the following reports:
    - Checked-out Documents
    - Check-in
    - Class and Subclass
    - Expiration Date
    - Overdue (Checked-out) Documents
    - Published Documents
    - Routing Slips

Document Data Migration Utility Now Supports Windows 8

You can now install and run the Document Data Migration Utility from a workstation with the Windows 8 operating system. To allow this, the Data Migration Utility will now use SQL Express 2008 R2. Prior to this release, SQL Express 2005 is used. This may extend the amount of time to perform the upgrade on any workstations previously used to run the Migration Utility.

Correct Disk Space Shown After Recycle Bin Purge

Some customers reported that the available disk space was not being updated after purging files from the recycle bin. In this release, the correct disk space is now shown.

Silent Installer

Document On-Premise can now be installed on staff workstations silently using SMS, allowing the software to be installed without any end user intervention required.

ADDITIONAL INFORMATION

You can learn more about CCH Axcess by visiting our Web site here, or by contacting your local sales representative. To learn more about the CCH Axcess suite, visit our website here.

Please visit Customer Support Online to stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.