Wolters Kluwer

Release Notes

Release 2016-3.4
April 2017

CCH Axcess Document

Welcome to CCH Axcess™ 2016-3.4

This bulletin provides important information about the 2016-3.4 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

Feedback Enhancements

You now have three links when selecting to submit feedback:

- *Request a new feature* opens the CCH Axcess Feedback Forum where you can submit your idea. While you're there, look around and vote on ideas submitted by others.
- *Report an issue* opens the CCH Support website where you can create a support ticket.
- *Something I don't like* opens the feedback form to submit your feedback to the Document team.

Print/Export Recycle Bin Content

You can now print/export content from the recycle bin to CSV file format, allowing you to open it in Microsoft® Excel® for analysis or reporting.

New Client Responsible Staff Column

You can now add an optional client responsible staff column to the recycle bin grids. You can choose what client responsible staff will be visible in Recycle Bin Options. The client responsible staff column header reflects that choice.

Remove Entity from List

You can now remove an entity from the left navigation pane by right-clicking and selecting *Remove from list*. This feature was previously available only on the Recent Entities tab.

Attaching PDFs from CCH® Axcess™ Document in CCH® ProSystem *fx*® Tax or CCH® Global *fx*® Tax

You can now attach a PDF from CCH® Axcess™ Document in CCH® ProSystem *fx*® Tax or CCH® Global *fx*® Tax for electronic filing. Click in the PDF File Name field and then click the Document button in the Attach Files window. The Document window displays a list of PDFs for your client. It is recommended that you link your client prior. If you haven't linked your client, you will be prompted to do so here.

Cloud Purge Restore

Cloud purge restore gives you the capability to restore files that may have accidently been deleted or purged. The cloud purge restore tab in the recycle bin lists files that have been deleted from the recycle bin or automatically purged within the last 90 days. These files can be restored if cloud purge restore is enabled. The default administrator must be logged in to enable this tab, and is the only one who is able to restore files. The files will be restored to the recycle bin. The default administrator will need to turn on cloud purge restore under Document configurations to enable this feature.

If cloud purge restore is not enabled, or if it is enabled but 90 days have passed, files that have been deleted from the recycle bin are permanently deleted and cannot be restored. CCH Support cannot retrieve permanently deleted files.

Microsoft® Windows 10 Anniversary Edition Compatibility
Document now supports Microsoft® Windows 10 Anniversary Edition.

Common Updates

Compatibility Client Marketing Method
A new field on the Administrative screen of the client profile allows firms to select how they attracted the client to the firm. Firms may customize the methods in Client Lists. Client reporting by method will be available in a future release.

Client Responsible Staff - Referring Staff and Prospect Owner
Currently, firms may add client responsible staff types in client lists. With this release, client lists also allow the firm to designate one responsible staff type as prospect owner and one responsible staff type as referring staff. A future release will use these designations.

Client Profile - Private Notes
In our ongoing efforts to reduce complexity, we disabled the private note option for both new and existing client notes. This change is also due to the limited use of this setting. Only client notes could be set as private. All other note types, such as tax return, project, and billing notes, are not affected.

If your firm wants to keep private note contents, re-create them before September 1, 2017. All client private notes will be deleted in a future release.

To find and review private notes that may exist for your firm's clients, do the following:

1. In Dashboard, click **Reports Manager** on the Application Links window.
2. Double-click **Firm Library** > **Firm** > **Client Notes Report**.
3. Set the *Private* field name filter to equal **Yes**.
4. Set any additional settings for the report, such as a date range.
   Tip: Select **Full** for *Display full notes or summary* to include complete note detail.
5. Select to preview or print the report.

Fixed in This Release

The following have been fixed in this release of Document:

- Clicking the reset button now resets to the default text on the email notifications.
- Un-checking a Document email notification no longer produces an unnecessary warning message.
- When grouping by columns, the scrollbar now remains in place rather than being brought back up to the top.
- A Microsoft® Windows 8 and 10 update caused the color in the entity navigation pane to become a cornflower blue, causing difficulty seeing the entity names. This issue has been resolved.