

CCH Axxess Document

Welcome to CCH Axxess™ 2016-5.0

This bulletin provides important information about the 2016-5.0 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

New Purge Protection Option

Your firm can now configure Recycle Bin to only purge files that have been in the Recycle Bin for at least the firm-configured minimum number of days, allowing firms enough time to review files in the recycle bin before the automatic purge service runs. Purge protection can be configured under Recycle Bin Options, and is only available when the Automatic Purge feature is enabled.

Audit Activity Report User Filter

You now have the ability to run the file audit activity report for one or more selected staff. This new feature saves time sorting through file activity for the entire firm to find activity for a single user.

Incoming Files and Share Safe Tabs in Document Central

The **Incoming Files** tab now only includes incoming files from CCH Axxess Portal. The Share Safe incoming files section has been moved to the new **Share Safe** tab in Document Central.

Expire a File in Share Safe

If a file was sent an error, you no longer have to wait up to 30 days for the file to expire. You can expire sent files immediately, right from the Share Safe tab. To expire a file, select the file, right-click and choose Expire File or click the Expire File button. The file will expire immediately and will be removed from the grid. The client will receive a message that the file is no longer available when they attempt to download an expired file. Staff users who belong to the full rights security group will have the ability to view and expire files sent by other staff members through Share Safe.

Share Safe Staff Users

You now have the option to choose who can receive files through Share Safe. A new 'User can receive files through Share Safe' checkbox has been added on the Document plugin of the staff profile. If the box is checked the staff member will be able to receive files through Share Safe. If the box is not checked the staff member will not be on the "Send to" list on the Share Safe client website. The box is checked by default.

Share Safe URL Changes

By default, your firm's account number is used in the firm-specific portion of the Share Safe URL. The account number will be replaced with a system generated random combination of letters and numbers that will be unique to your firm.

Note: Any traffic using the original URL with your firm's account number will be redirected to the new URL until June 30, 2018 to provide firms enough time to update their websites and documentation, and gives clients time to update their browser bookmarks, favorites or hyperlinks.

We strongly recommend that you customize your URL, if your firm has not yet done so. This provides additional security and allows your firm to brand your Share Safe URL at the same time. Your firm administrator can change this portion of the URL by logging into Document

Central, and following the instructions below. If your firm has already customized its Share Safe URL, then your customization will not be modified, and no action is required.

Share Safe Customization Instructions

1. Select **Share Safe > Share Safe URL** on the Document Central button bar.
2. Select **Edit**.
3. Enter your firm's preferred customized URL in the field provided, following the guidelines below.
4. Select **Apply**.
5. Select **Close**.

Share Safe URL Customization Guidelines

The firm-customizable portion of your Share Safe URL can include:

- Up to 48 characters
- Letters
- Numbers
- The following characters: () - _ . '

Note: If you included numbers in your customized URL, they must be combined with at least one other character. This restriction prevents potential conflicts with default URLs that include firm account numbers.

Notification When Maintenance is Complete

You may choose to be notified when server maintenance is complete and CCH Access is available. See [Configuring Notifications](#) for information about how to enable this option for your firm and choose the email addresses to which the system will send a message. Your recipient choices for CCH Software News are not affected by CCH Access notification settings.

Fixed in This Release

The following have been fixed in this release of Document:

- Files restored from Cloud Purge Restore were encrypted and not readable