

CCH Access Document

Welcome to CCH Access™ 2017-3.4

This bulletin provides important information about the 2017-3.4 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

Document Dashboard Panes

We are now saving the layout changes on the Document dashboard panes. When logging out and back in, the Document Dashboard Panes will retain your previous grid layout.

Office and Business Unit Filter

Beginning with this release, we have added the option to filter your Staff, Client and Non-Client list to search a specific Office and/or Business Unit. Office and Business Unit will default to "all." You can filter from the alphabetical list of Offices and/or Business Units to which you have access, and select the individual one you want to search. Once the selection is made, your results will be filtered based on it. Your Office and Business Unit selections will be retained the next time you log in.

Partner Name Appended to Individual K-1s

Beginning with this release, when printing individual K-1s from CCH® ProSystem fx® Tax, CCH® Global fx® Tax and CCH® Access™ Tax to CCH® Access™ Document the individual partner name will be appended to the end of the file name in Document. Document Tax Mapping modifications are not needed to see the changes. Applies to new K-1s printed to Document.

Download Hyperlink

Beginning with this release, **Preview the file** is now an option when copying or sending a hyperlink from a file stored in Document. Clicking the hyperlink for a file in Document opens the Hyperlink File Option window, where you can choose one of three options:

- Download file as read-only
- Direct edit the file
- Preview the file

Microsoft® Windows® 10

Beginning with this release, Document is compatible with Microsoft® Windows® 10 and Microsoft® Windows® 10 Fall Creators Edition.

Adobe® Acrobat or Acrobat Reader 17

Beginning with this release, Document is compatible with Adobe® Acrobat Standard and Professional 2017.

2-Step Verification (Multi-Factor Authentication) for CCH Access

With the 2017-3.4 release, 2-Step Verification will be available as an optional setting for firm Administrators to configure in Firm > Settings and Defaults > Login Setup. 2-Step Verification applies to the CCH Access login mode and not the Active Directory or Federated Services login mode.

For more information, see our article and video on [administrators enabling 2-Step Verification for your firm](#).

Important Note: With the initial release of 2-Step Verification in CCH Axcess, the default is a disabled state and the firm must opt-in to enable the option. Based on increased security requests by the various taxing jurisdictions, we will change the option default to be enabled and the firm must opt-out to disable the feature. This change will occur on the 2017-5.0 release in November, 2018.

Fixed in This Release

The following have been fixed in this release of Document:

- We have resolved an issue which prevented some users from seeing all client uploaded files in Share Safe.
- We have resolved an issue which prevented Share Safe columns from being resized.
- We have resolved an issue where column settings on Share Safe and Incoming Files tab were not retained.