CCH Axcess Document

Welcome to CCH Axcess™ 2017-5.0

This bulletin provides important information about the 2017-5.0 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

Office and Business Unit Filter
Beginning with this release, Office and Business Unit filters will be contained within the list options. You can change your Office and/or Business Unit selection by expanding list options. We moved Staff Name Lookup, Client Name Lookup and Non-Client Name Lookup boxes outside of the list options and they will remain visible at all times.

2-Step Verification (Multi-Factor Authentication)

As indicated in previous CCH Software News emails, we will change the default option to be **on** or enabled so the firm must **opt-out** to disable the feature. We strongly discourage the disabling of 2-Step Verification.

Notes:

- 2-Step Verification applies to the CCH Axcess login mode and not the Active Directory or Federation Services login mode.
- 2-Step Verification is available at the firm level only for default administrators and not on a user-by-user basis.

For more detailed information, please see our Knowledge Base Article on 2-Step Verification.

Office Plug-ins Login Window
Beginning with this release, Document Office Plug-ins login windows screen have been replaced with the Axcess suite login to enable the use of 2-Step Verification.

With the new window, the following changes occur:

- "Remember me" password box has been removed.
- Configurations settings screen has been removed.

Share Safe 2-Step Verification (Multi Factor Authentication)
2-Step Verification is now mandatory for all users sending files through Share Safe. There is **NOT** a way to **disable** or **opt-out** of 2-Step Verification for Share Safe.

The following changes occur:

- You will be required to enter in a phone number for each recipient every time you send a file through Share Safe.

- Clients will receive two emails. The first email will list the files available for download and inform them they will receive a second email with instructions on how to access files using 2-Step Verification. The second email will include the unique URL and steps to securely receive their files using 2-Step Verification.
- New option "Send me a copy of unique URL sent to my client" has been added to the Send a File Options screen.
- Create File Access Key, System generated File Access Key and Do not sent File Access Key Email options have been removed from the Send a File Options screen.
- Your client will be taken to the 2-Step Verification screen when clicking on the unique URL in the Share Safe email. There they will select to receive a one-time code by text or voice.
- The code will expire 5 minutes after code has been sent.
- Unique URL will be sent each time a file is sent with Share Safe.
- Unique URL will be valid for up to 30 days based on firm setting in Send a File Options (30 days is the default).
- If a Share Safe file is expired and there are no other active files for that phone number, the phone number will no longer be available for selection.

Share Safe audit report

Beginning with this release, we have added a new Share Safe audit report to Document reports. Report details will track the client email, phone number used for 2-Step Verification, whether the login was successful, IP address, device and browser used. Audit details will be searchable for 365 days from the audit date.

Fixed in This Release

The following have been fixed in this release of Document:

- We have resolved an issue where blank pages and erroneous page numbers were displayed when running audit trail reports. Audit Trail Reports will now reflect a correct number of pages and display only data related pages.

- We have resolved an issue where clicking the Help icon from Document Office Plug-ins didn't launch help.