Wolters Kluwer

CCH Entities

CCH Entities: The best browsers and devices to use

This guide will help you to understand the best browsers and devices and also so how to upload and download documents

We have tested CCH Entities with Firefox, Chrome, Internet Explorer and Safari. It has also been tested on Windows computers, iPhones, iPads and other smart phones and tablets.

Browsers

	Chrome Recommended	Firefox Recommended	Internet Explorer	Safari
Access data	✓	✓	✓	✓
Add/edit data	✓	✓	✓	✓
Create documents	✓	✓	✓	✓
Upload documents	✓	✓	✓	✗
Download documents	✓	✓	✓	✓
Edit documents	✓	✓	✓	✓
Complete checklists	✓	✓	✓	✓
Add tasks to software	✓	✓	✓	✓
Add tasks to Outlook	✓	✓	✓	✗
Reports	✓	✓	✓	✓
Link to NZ Companies Office & import data	✓	✓	✓	✓

Recommended: Generally Chrome and Firefox perform a little better in terms of speed and screen display, particularly when completing Checklists.

Devices

	PC/laptop with Chrome, Firefox or IE	Android with Google Chrome	iPhone/iPad with Safari
Access data	✓	✓	✓
Add/edit data	✓	✓	✓
Create documents	✓	✓	✓
Upload documents	✓	✗	✗
Download documents	✓	✓	✓
Edit documents	✓	✗	✗
Complete checklists	✓	✓	✓
Add tasks to software	✓	✓	✓
Add tasks to Outlook	✓	✗	✗
Reports	✓	✓	✓
Link to NZ Companies Office & import data	✓	✓	✓

Whilst it is technically possible to work on a smart phone the screen size can make it difficult.

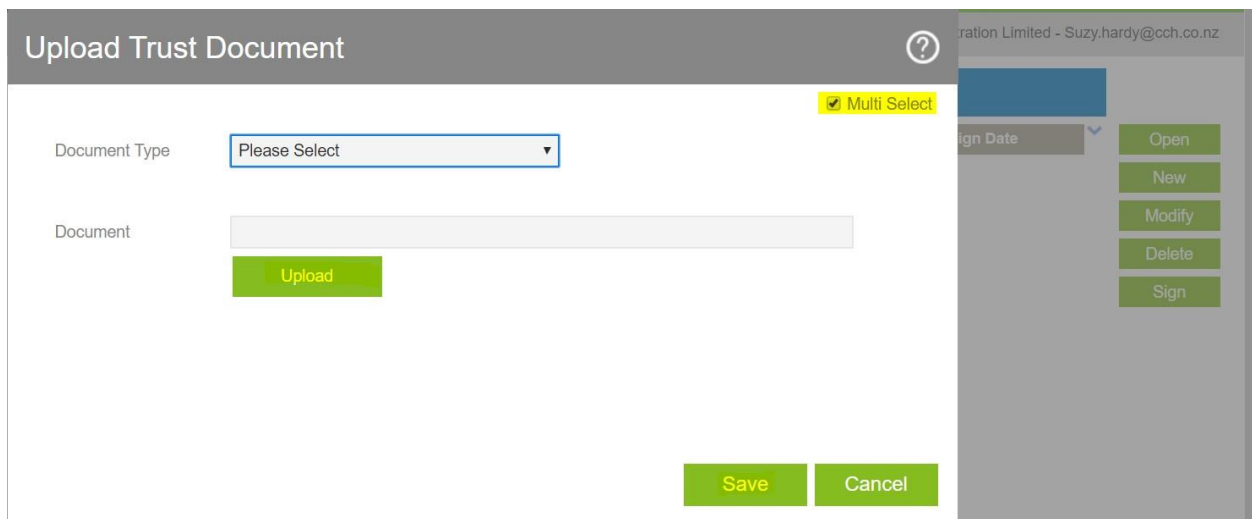Additional apps may be required to create and view documents using a phone or tablet.

Settings

If you find you are able to do some things in one browser and not another it is most likely due to your local settings.

Uploading Documents

Documents are uploaded to the documents area, from there select **New > Upload Documents**.

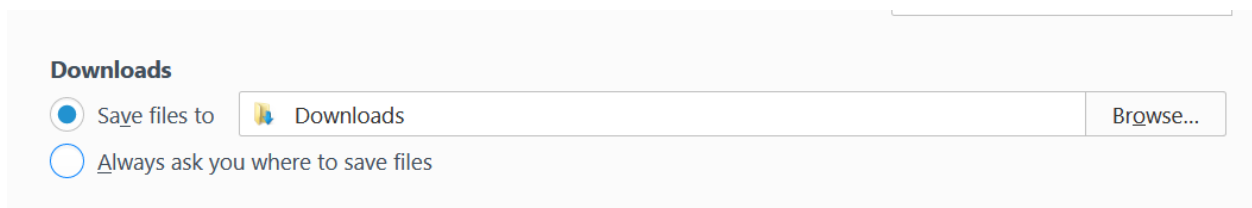If you want to upload more than one document at a time, tick the Multi Select option.

Downloading Documents

Downloads may appear on a separate tab, new window, at the top of your screen or at the bottom of your screen. You may be asked to save them before you open them or not.

Resolution: If you want to change your download preferences have a look at your browser settings.
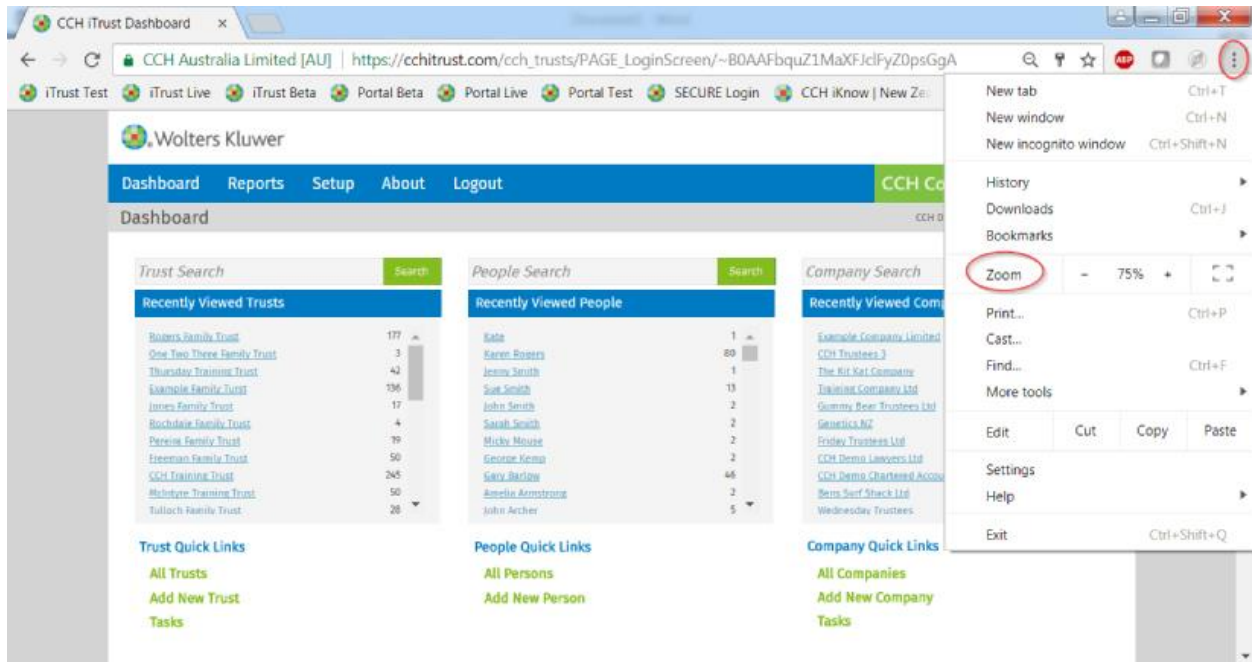
Example in Firefox

Note: Some download settings may be controlled by your system administrator.

View

The software may not display well with data being cut off or the dashboard notifications overlapping information.

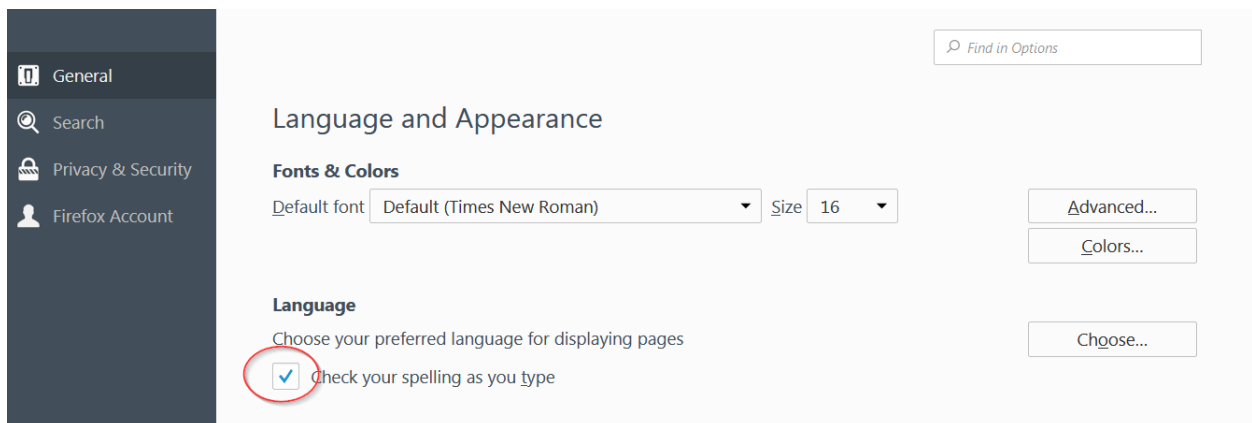Resolution: Zoom your view settings in or out.

Example in Chrome

Spelling

Your browser should offer a spell check feature as you type.

Resolution: Check your settings to ensure the spell check is enabled.

Example in Firefox

GETTING HELP

Your IT support person should be able to help with your browser settings.