CCH Axcess™ Workflow

Welcome to CCH Axcess Workflow 2023-3.4

This bulletin provides important information about the 2022-3.4 release of CCH™ Axcess Workflow. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

Don't Forget

CCH Axcess Feedback Forum - Aha!
Have an innovative thought on how to enhance the CCH Axcess Workflow product? Get involved directly! Simply click on the light bulb icon located in the top row of the CCH Axcess Workflow interface to access our dedicated [Idea Forum](#).

💡 Suggestions that are selected for development will be clearly marked and highlighted in these release notes. Be sure to watch for the light bulb icon next to the feature descriptions below, which indicates ideas integrated from our forum.

New to CCH Axcess Workflow

Did You Know?
We are excited to announce a new feature within our program designed to enhance your user experience and broaden your knowledge of the numerous capabilities at your fingertips.

To help you discover and understand features that are either new or less familiar, we've introduced "**Did You Know**" icons across various areas of interest within the program.

- When navigating through the program, look for the "**Did You Know**" icons.
- **Click on the icon**: A detailed description of the feature will appear, complete with insightful text, helpful videos, and links for further reading.
- **To close the information:** You can either click on the icon again or use the "X" at the corner of the information window to exit.

This feature was developed to ensure that you are fully utilizing all aspects of the software, making your experience more efficient and informative. Explore this new tool and discover hidden functionalities to enhance your workflow!

Delivery Method — "Safe Send"

Users will have access to the new Delivery Method "Safe Send," a popular shipping method. This inclusion allows firms to align their delivery preferences with industry-standard capabilities, thereby enhancing their operational efficiency.

Persistent Filters and Columns in Search Results

We have expanded the implementation of persistent filtering and sorting of records to the Search and Advanced Search results page(s). Allowing users to continue where they left off with minimal disruption and effort, this feature improves productivity by ensuring a more seamless user experience.

Each user's settings on the Search results page can now be saved. This means that the filters and sorting applied by the user will be retained and applied automatically when they revisit the Search page(s).

For more information review the following video: [CCH Axcess Workflow: Persistent Filters](#)

Scheduler Forecast Report Date Parameters

This enhancement aims to align the date parameters of the Scheduler Forecast Report with those provided in the Schedule by Employee feature, streamlining weekly planning activities by allowing the same weekly parameter settings across both functionalities.

The Scheduler Forecast Report can now be generated with weekly segregation. This change aims to streamline workflow and align the reporting capabilities more closely with users' needs.

Reintroduction of Client Group Assignments to the Client Sync
Firms using the Axcess integration will now have an improved user experience managing client groups.

The reintroduction of client group assignments to the sync process includes updated mechanisms to handle data more efficiently, reducing the occurrence of stale data issues. This update ensures that syncing occurs with up-to-date and accurate Axcess client group data.

Updated and New APIs
- **/api/v2/Client/{ClientID}/RemoveGroup**

We have created a new Workflow API to handle group assignments at the client level. Integrators will be empowered to automate and streamline the removal and management of client groups. This will allow for a more efficient and flexible system, capable of integrating seamlessly with other software applications, thereby expanding the use cases that can be automated across platforms.

- **/api/v2/Task/{TaskId}/deliverable/create**

We have introduced an API functionality that provides integrators with access to the existing list of State Forms and State Names. This feature aims to support the creation of tailored deliverables at the task level, enhancing the versatility of task management across different states.

- **/api/v2/Firm/statuses/CategoryId**

The new API endpoint now allows integrators to obtain comprehensive details of all available task statuses, along with their respective categories. This enhancement facilitates the development of robust automated workflows and integrations by providing deeper insights into task management operations.

Important - CCH Axcess Workflow Sandbox URL Update

We are excited to announce an important update that aims to enhance your experience with our services. As part of our commitment to providing you with the best possible platform for your needs, we are implementing a change to our sandbox environment.

As of June 15th, we will be updating our sandbox URL. This update requires your attention and action to ensure a seamless transition and continued access to our services, as the current sandbox URL will be decommissioned.

- **Current Sandbox URL:** https://sandbox.xcmsolutions.com/xcmv2/
- **New Sandbox URL:** https://sandboxworkflow.cchaxcess.com/xcmv2/

Please make the necessary adjustments to your configurations, scripts, or any relevant documentation to accommodate this change. Updating the sandbox URL before June 15th will ensure that your development and testing efforts continue without interruption.

Note: The new URL is available now, and it is recommended to make the appropriate adjustments as soon as your firm is able. This proactive step will allow for a smoother transition and avoid any potential disruptions in your workflows.

Technical Updates

API Enhancements
- **Task Details Recovery**: Firms encountering a 500 Internal Server error can now successfully retrieve task details via the Create Task endpoint (api/v2/task).
- **Schema Description Update**: The field description of the schema section detailing PATCH method has been updated to enhance clarity and utility.
- **SignOff Date Addition**: SignOff Date is now included in the response of the Task Search APIs (api/v2.1/Task/Search).

Axcess Integration
- **Client Import:** Previously, some firms were unable to load clients in the Import & Exclude Client utility. This issue is now addressed.
- **Axcess Time Integration:** Improved to handle exceptions that could prevent time from syncing between CCH Axcess Practice and CCH Axcess Workflow.
- **Sync Jobs Date Format:** The Updated Date on Sync Jobs now displays in mm/dd/yy format, ensuring improved user experience and consistency.

CCH® ProSystem fx® Practice Management Integration
- **Import and Exclude Utility Improvement:** Clients that have been previously imported via PM5 integration no longer remain listed in the Import or Exclude External Clients/Entities utility post-import.

My View & Routing Sheet
- **My View:** Addressed the issue where the My View page was not loading for some users.
- **Enhanced Task Linking:** Users can now select 10 or more tasks to link within Linked Tasks of the Routing Sheet.
- **Document Attachment Reliability:** Attaching a document within CCH Document Link of the Routing Sheet now opens reliably and consistently.
- **Default User Search:** Users now appear by default in the Search Users field of the Move Extension function in the Extension section of the Routing Sheet.

Move Task & Notification
- **Movement of Tasks**: Addressed the issue where moving a task failed due to a server error.
- **Updated Email Notification Hyperlink:** The hyperlink "Click here to access XCM site" within email notifications has been updated.

Task Creation & Rollover
- **Rollover of Hours:** Hours from the previous task successfully roll over to the new task for all staffing.
- **Shipping Details Rollover**: Prior year Shipping details successfully roll over to the new task when selecting the Copy from Prior option.

Utilities & Reports
- **Find Staff Assignments Utility:** The utility now correctly pulls responsibilities for assignments that are blank.
- **Detailed (Expanded) Report:** Updated to address an issue where the webpage was not available.
- **Summary - Distributable Format Report:** Now displays only the columns selected by the user.
- **Manage Clients Enhancements:** The utility now supports parentheses in Task Type Descriptions and restricts setting a client to a deleted location.

Resource Allocation Schedule (RAS)
- **Exclusion of Statuses:** Statuses set to be excluded are now properly unavailable within the RAS search.

- **Right Click Issue:** Opening "Schedule by Employee" and/or "Schedule by Task" in a new tab no longer displays an error message about the resource being unavailable.

These updates are aimed at providing a smoother, more intuitive experience across our platforms and utilities, ensuring greater usability and efficiency.