CCH Axcess™ Practice

Welcome to CCH Axcess Practice 2020-3.5.

This bulletin provides important information about the 2020-3.5 release of Practice. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

ADSync Tool
If your firm uses the CCH Login (username/password) mode of authentication, the following information is not applicable.

If your firm uses Federated Services with the ADSync Tool, you can now create the OAuth token using a new feature in Dashboard. This new option is only applicable to firms using our Passive with IDaaS mode of authentication. To access this feature, do the following in Dashboard:

1. Click **Application Links**.

2. Click **Utilities** under Firm.

3. Click **Common** on the navigation pane.

4. Click **ADSync Authentication Token**.

Any firm using older modes of Active Directory Integration or ADFS Active mode should continue to use the existing method for AD synchronization.

Firms using the Passive without IDaaS mode of authentication should use the older ADSync Tool or move to Passive with IDaaS to use the newer ADSync Tool.

Please contact our Wolters Kluwer support team if your firm needs to move from Passive without IDaaS to Passive with IDaaS mode of authentication. Click here for more detail on when and how to use this new OAuth Token for the AD Sync Tool when CCH Axcess is configured for Passive with IDaaS mode of authentication.

Technical Corrections

Time Capture
To prevent folders from becoming corrupt, Time Capture views no longer allow folders to be cut, copied, and pasted.

Contacts
Contacts set as recipients of email invoices or statements in Project Other Billing information are now considered to be active references and cannot be deleted until this is addressed.

Lump Sum Transfer
Performing a lump sum transfer to more than one client at a time no longer results in 0 hour transactions being created for the "transfer to" client.

All Reports
The report history now populates with the most recently run reports.

An error no longer displays when advanced filters contain a bracket after an "= All" filter

Staff Productivity Budget
Billing realization columns are no longer cut off when exporting to PDF.

Monthly Comparison
Page space is used more efficiently to reduce the number of pages required to print this report.

Billing Worksheets
Billing fee agreements (BFA) now display for clients that have a BFA assigned, and not for clients where BFAs have been deleted.

Staff Productivity
The service class "= All" filter now includes non-billable records.

Service class filter operators for "is not blank" have been removed, as these are not valid configurations for a service code.

Client Ledger and Monthly Activity
To match other reports, progress applied to an unposted invoice is no longer considered as applied in the WIP Beg and End balances.