Release 2014-5.0
November 2015

CCH Axcess™ Reports Manager

Welcome to CCH Axcess 2014-5.0

This bulletin provides important information about the 2014-5.0 release of CCH Axcess Reports Manager. Please review this bulletin carefully. Additional information is available on our Customer Support site.

New in this Release

Data Warehouse

To facilitate faster generation of reports and support, our long term strategy of deeper access to data for reporting, we moved certain reports to a data warehouse. The data in the data warehouse will be refreshed once every 24 hours, overnight U.S. Central Time between 1:00am-6:00am. Our goal is to lower this refresh interval with subsequent software updates in Q1 2016.

The following reports are now part of the data warehouse:

- Client List
- Client Profile
- Staff Realization & Productivity
- Billing Report
- Monthly Comparison
- Staff Monthly Production
- Firm Management
- Client Production
- Client Billing Realization

While the data refresh is occurring, reports in the data warehouse will be unavailable. Once the data refresh completes, you can resume running these reports. Additionally, new data that is saved after the last data refresh will not be included in reports until the next data refresh.

Staff Management Report

We created a new Staff Management report that includes information to help you review and manage staff performance. With four date ranges, you can analyze and compare information from multiple perspectives. The report includes information about Services, Expenses, Billable and NonBillable hours, Billed amounts and hours, Write Ups/Downs, Invoices, Realization, and Cost. Various filtering, sorting, and grouping options are available. You can also create Basic and Advanced custom versions of this new report.

Time and Expense Report

You can now filter the report by Billable type. This allows you to run the report for just Billable or NonBillable time.

Technical Corrections and Known Issues

Performance and accuracy improvements were applied to the following reports to resolve technical and reported issues.

- **Billing Worksheet by Service Codes and By Project**
- **WIP/AR Aging**
- **WIP/AR Summary**
- **Time and Expense**
- **Time Analysis**
- **Accounts Receivable Detail Aging**
- **Client List**
- **Staff Realization and Productivity**
- **Billing Activity (Register)**
- **Billing Report**
- **Monthly Comparison**
- **Staff Monthly Production**
- **Firm Management**
- **Client Production**
- **Accounts Receivable Payments and Credits**
- **WIP/AR Reconciliation.** The AR Beginning Balance and AR Ending Balance filter names were changed from Beg Balance - AR and End Balance AR. This standard naming convention allows staff to easily find the filters to add to a report. If you use either of these fields on your reports, click to view the Knowledge Base article on how to update the filters in the report. You must update your filters after the release.
  Note: If you have custom versions of this report and experience any issues, please contact our Customer Support team for assistance.
- **Client Billing Realization.** The Payments column was removed from this report. Based on customer feedback, we will determine when to add this column back to the report.
- **Client Profile**
  Note: If you have custom versions of this report and experience any issues, please contact our Customer Support team for assistance.