Wolters Kluwer

Release Notes

Release 2018-3.5
June 2019

CCH Axcess™ Workstream

Welcome to CCH Axcess Workstream 2018-3.5

This bulletin provides important information about the 2018-3.5 release of CCH Axcess Workstream. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

***Coming Soon* Research & Learning Tax Calendar Integration**
This summer, Workstream will integrate with the Research & Learning (R&L) Tax Calendar. The R&L Tax Calendar is an existing database used by our CCH® IntelliConnect and CCH® AnswerConnect products. With the new integration, Workstream will be able to automatically update form due dates and recalculate those form due dates on projects.

When a jurisdiction updates a due date, the R&L Tax Calendar date will be updated. Within 48 hours, the updated due date will be imported and recalculated automatically on the projects with that form in Workstream.

Workstream uses two types of forms, calendar-based and fiscal year-based forms. Due dates are calculated based on the Project's Planned Start Date and Project Start Year for calendar-based forms; the Fiscal Year field is used for fiscal year-based forms.

To prepare for the R&L Tax Calendar integration, it is important to make sure the correct values are assigned to the following fields in your projects:

- The Project's Planned Start Date and Project Start Year represent the date when the project is planned to start. If a project does not have a Planned Start Date, the system will use the Project Start Year and assume it is January 1 of that year. Calendar-based forms will use that value when calculating due dates.
- The Fiscal Year represents the taxable year of the work tracked in the project. This field identifies which year the fiscal-based forms will be calculated for. For example, 1040-ES Quarterly forms are calculated in the current fiscal year. 1040 forms are calculated as the 15th day of the 4th month following the fiscal year.

Batch Project Update Utility
The Batch Project Update Utility can be used to update the fiscal year of projects in batches. There is no limit to the number of projects that can be updated at one time with the utility. To use the Batch Project Update utility, you must import a Microsoft Excel™ spreadsheet that identifies the Client ID, Client Sub ID, Project ID, Project Name, and Fiscal Year to assign to projects.

Data Insights
The Dashboard Application Links now display **Business Intelligence** > **Data Insights** for all staff of firms who use CCH Axcess Practice or Workstream. A user with firm setup functional rights can hide the new link or direct it to open Microsoft® Power BI on the Web. Your IT department can follow the on-screen links to learn about how to publish Data Insights and other Power BI files connected to your Data Axcess database. If you are unfamiliar with Data Insights, read more online or contact your solution consultant.

Client Manager Quick Search Export
You can now export all pages from the client quick search view, up to 20,000 rows. Other views in Client Manager continue to export the current page.

Reports Quick Export - New File Type
In addition to existing Quick Export options, you can now export to Microsoft® Excel® .XLSX workbooks using the following steps:

1. Select the report from a Reports view.
2. Click **Print Options > Export**.
3. Enter a path, select XLSX file type, and click **OK**.
4. Click **Quick Export**.

Modifying Historical Clients and Staff
Historical clients and staff are retained for reporting. They are not visible in most parts of CCH Axcess and cannot be deleted. Beginning with this release, you can change:

- The ID, sub-ID, and sort name of historical clients.
- The user ID, staff ID, report name, and system email address of historical staff.

Modifying these attributes makes the original values available for other clients or staff. It can also offer more control over how historical clients are listed in relation to active clients when grouped, sorted, and subtotaled in reports. You must have the Client ID functional right (Edit) in any organizational unit to edit historical clients. You must have the staff profile functional right (Edit) in any organizational unit to edit historical staff.

Technical Corrections

Deleting Forms in a Batch
Deleting unlocked forms in a batch no longer produces the message "Form cannot be deleted as it is locked at parent."

Add Project Note
Add Project Note button from the Route Sheet now functions properly.

Billing Worksheet by Project Report - Deleted WIP
The Billing Worksheet by Project should only show clients with unbilled WIP. Previously, a client would show on this report if the only unbilled WIP was deleted. Now, such clients are omitted from the report.

Report Options and Settings Disappear on Reports
Two options and settings issues have been resolved for reports created by making a copy of a report that was also created from a copy of a report. For example, you copy a report from Firm Library to My Reports. Later, you copy from My Reports to Shared Reports.

- Previously, resetting the options and settings on the second copy (Shared Reports) resulted in options and settings that matched the first copy (My Reports). Now, resetting the options and settings on the second copy (Shared Reports) results in options and settings that match the defaults from Firm Library.
- Previously, deleting the first copy (My Reports) caused the options and setting to not display on the second copy (Shared Reports). Now deleting the first copy (My Reports) does not affect the second copy (Shared Reports).