Release 2019-4.1
July 2020

CCH Axcess Workstream

Welcome to CCH Axcess Workstream 2019-4.1

This bulletin provides important information about the 2019-4.1 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

Updated Terms of Use
All users must accept modified terms of use the first time they log in after the deployment of release 2019-4.1. These terms may be accepted during login to any one of the following:

- CCH Axcess products that are installed on your computer.

- Web sites that include cchaxcess.com in the address, such as collaboration.cchaxcess.com, financialprep.cchaxcess.com, and knowledgecoach.cchaxcess.com.

- Third-party applications using Open Integration Platform Token Authentication.

CCH Axcess users who attempt to log in to some third-party applications using Ouath 2.0 Preview APIs will receive an error message until terms are accepted during one of the login methods described above.

User Phone Prompt During login
To prepare for IRS mandates regarding 2-step verification, a phone number is now required for all users of firms using the CCH Axcess login method. This change does not affect firms using Active Directory or Federation Services to log in.

After a user enters their password and completes 2-step verification, CCH Axcess prompts the user to enter a direct phone number if the phone numbers on the staff profile are empty. The user must verify the phone number by either:

- Entering a code sent by SMS text message

- Pressing # after answering an automated call

After verification, the new phone number is saved to the business phone on the staff profile.

Note: This feature allows users to enter and verify a phone number in their own staff profile, even if they don't have permission to edit staff profiles. The behavior and permissions for managing phone numbers in Staff Manager and Open Integration Platform are unchanged.

Secure Connections During Active Directory Sync
As previously announced, this release updates the connection used for Active Directory sync from standard to secure. If your domain supports a secure connection, then no action is required. If necessary, you may downgrade to a standard connection. This change does not apply if your firm uses the CCH Axcess login method or a custom staff synchronization solution.

Replace Federation Services Secondary Certificate

If your firm is using the [Federation Services login method](#) it is important to have a secondary token signing certificate to ensure uninterrupted use of CCH Axcess when the primary certificate expires. Previously, you were required to repeat pilot mode, metadata upload and other steps. Now, you may [add or replace the secondary certificate](#) without these other steps.

Client Access Group Limit

CCH Axcess allows up to 1,000 client access groups per account. If more than 1,000 groups exist, the software will not allow new groups until the number of groups is reduced below the limit

Known Issues

Custom Forms

The following custom forms now can be edited:

- 1120-C
- 1120-FSC
- 1120-H

- 1120-L
- 1120-PC
- 1120-POL

- 1120-REIT
- 1120-RIC
- 1120-SF

Deleting Projects

In some instances, deleting projects took an extended amount of time. Projects now delete within consistent and expected timeframes.

Roll Forward

The following issues have been resolved for roll forward:

- When rolling forward projects, the following error no longer displays when either of the tailoring questions to *Use workflow roles* or *Use Worksteps* is set to No: "Object reference not set to an instance of an object."

- Projects with milestone dates that are configured to be set by the completion of a workstep no longer reset to "Staff entry" during roll forward.

- Workstep assignee planned dates now update appropriately during roll forward.

Update Multiple_All Selected

The following issues are resolved for the Update Multiple - All Selected feature:

- Key tracking dates of projects now update successfully.

- Project role assignments based on client responsible staff now update to the appropriate staff.

Workstep Assignee Budget Hours

Workstep assignee budget hours now update appropriately upon project creation.

Staff Project Budget to Actual Report

The Staff Project Budget to Actual report now shows the actual hours for staff not assigned to a workstep. An asterisk (*) next to a workstep indicates that the staff who performed the workstep was not assigned to it, and therefore there is no budget to be displayed. The Unassigned staff section still shows the budgets for worksteps which are unassigned and will have no actual hours displayed.