Release Notes

Release 2013-3.5
May 2014

CCH Axcess Workstream

Welcome to CCH Axcess Workstream 2013-3.5

These notes provide important information about the 2013-3.5 release of CCH Axcess Workstream. Please review these notes carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 4. Additional information is available on CCH Support Online.

Enhancements

Project Assignment Pane - Open Route Sheet

Double-clicking a project on the Project Assignment Pane now opens the Route Sheet. This will save you time if you need to quickly access the Route Sheet and make changes to your project or verify project information.

Route Sheet Columns - Workstep Completed Fields

You can now add Completed fields to the Route Sheet, including information about the staff member who completed the workstep and the completed date.

Tax Return Clocks - Project Field

The Clock screen, which can display when you open and close a return in CCH Axcess Tax, now automatically populates the Project field for the clock if the return is linked to a Workstream project.

Client List Report

A new simplified Client List report is available in Reports Manager. This report was streamlined to provide faster access to key client information such as a simple address, phone, or email list for your customers. Also, the Client List report has been renamed Client Profile to more accurately describe the purpose and use for the report.

Technical Corrections

Templates

- You can now change workstep notifications in templates as appropriate.
- You can now create multiple notifications in a template and scroll bars function properly.

Route Sheet

- Dollar signs no longer display in the Hours column for worksteps on the Edit Project screen and the Route Sheet.
- If editing information on the Route Sheet by using type ahead in a lookup field, you can now further select from the narrowed down list using your mouse.
- You can now save and close a Route Sheet even if you have workstep notifications without assignments.

Reports

- You will no longer receive the message "Invalid Report Name" when importing custom reports.
- Project Budget to Actual and Project Summary filtered by Status now show all appropriate projects when the filter is set to "All."
- Project Budget to Actual now displays proper actual amounts when multiple WIP transactions are posted to the same workstep.

Other

- You can now use the Manage Form Due Dates button when creating a project and extend forms on open projects without having permissions for Workstream Lists.
- You can now export views multiple times without incident.
- The Quick Access Toolbar button for Client Dashboard now launches the Client Dashboard.
- In response to your feedback and to create a better user experience, the following features have been disabled and will be incorporated into other features or redesigned for future release:
  - Save as Template
  - Update Multiple Templates
  - Add to Multiple Templates

Reminders

For each release, CCH recommends that you compare your firm created Form Due Dates to the CCH Forms. We often add new forms or make changes to the form calculations that make CCH Forms a better choice for due date management than your firm-created forms. As a best practice, we recommend you check the CCH Forms after each release and determine if you wish to use the CCH Forms going forward. As a part of this process, you may also need to replace Form Due Dates used in templates and open projects. If you have questions, please contact our Customer Support team at the number above for assistance.