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CCH

Release Notes

2013-5.0
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CCH Axcess Workstream

Welcome to CCH Axcess Workstream 2013-5.0

This bulletin provides important information about the 2013-5.0 release of CCH Axcess Workstream. Please review this bulletin carefully. If you have any questions, contact Customer Support at 877-977-9739, option 4. Additional information is available on CCH Support Online.

Technical Corrections

Setup and Templates

- When deleting milestone dates or business units from the firm lists, proper active reference error messaging appears.
- Issues concerning locked roll forward rules have been corrected.
- Notifications generate properly when the notification has two recipients, a client responsible staff and role, but the role does not have a staff assignment.
- You can now set up multiple workstep notifications that go to the same staff, role, or client responsible staff recipient.
- You can now edit and save budget information in templates without issue.
- You can now delete worksteps tied to notifications in other worksteps without issue.
- You can now update notification settings through Update Multiple without issue.
- When changing the status on a completed project, and thus reopening the project, the Update Status screen closes properly after selecting No on the dialog prompting you to reopen all worksteps.
- You can now delete clients that are associated to soft deleted projects.
- You can now setup and save projects that have notifications set up to go to email addresses without issue.
- You can now add an assignee on the Update Multiple - Roles screen.

Route Sheet

- The route sheet size persists each time you open a route sheet during an Axcess session.
- Custom fields on the route sheet now display in the correct order; the list matches the order in Firm Lists.
- All areas of the route sheet display properly without any overlap to other sections below.
- Only the information selected in the Type Route Sheet layout display in the Workstep section on the route sheet.
- The Related Project link on the route sheet now opens the related project.

Worksteps

- Entering a Completed Date for a workstep without slashes now shows proper error messaging.
- The Reorder workstep utility now reorders worksteps based options selected in the utility.
- When reopening worksteps, the proper messages now display without references to notifications.
- Worksteps only display once on the Project Assignment pane Workstep view, regardless of the number of notifications on the workstep.

Roll Forward

- Workstep date calculations roll forward properly when using the options "Keep No" and "Get From Template."
- Role assignments and delivery methods roll forward properly based on roll forward rule settings.
- The proper number of forms roll forward for the project based on roll forward rule settings.
- Worksteps locked in the template now display properly in the new rolled project based on the roll forward rule settings.

Views

- You can now export a customized view without issue.
- Client Responsible Staff and Role columns display separately even if the role and CRS description are identical.
- Imported views import displaying the correct column order.

Reports

- When reports are exported to Microsoft® Excel, extra date and time information doesn't export in the footer. The 201 watermark no longer displays.

Integration

- When modifying time transactions, proper notifications trigger for budget and actual information based on your notification settings.
- Actual hours and amounts now transfer properly from Practice to Workstream and display properly on screens in both modules.
- You can enter time an expense transaction without additional Workstream template permissions.