

CCH Axxess™ Workstream

Welcome to CCH Axxess Workstream 2015-3.4

This bulletin provides important information about the 2015-3.4 release of Workstream. Please review this bulletin carefully. Additional information is available on CCH [Support Online](#).

New in this Release

Pools

To facilitate easier management of “unassigned” work, we’re excited to introduce the initial version of pools. Your firm can configure multiple pools based on various attributes such as status, office, project template, complexity, and priority. Presented to your staff via the Dashboard, this new feature gives you quicker access to information about unassigned work. This information was previously only available inside of Workstream,

Pools are sorted in order based on the Last Status Change date, which simulates a first in, first out (FIFO) order in the pool. You can assign yourself as the file holder of a pool item, which removes the item from the pool. You can also assign yourself to a role on the project at the same time. When you finish your work, if no one is assigned to work on the project next, you can change the file holder back to “In the Pool.” Through the combination of attributes selected during configuration, Workstream will route the item to the next pool.

Permission to access Workstream lists is required to control who can add and edit pools. Please review and grant permission prior to attempting to configure your pools.

Update File Holder When Marking a Workstep Complete

To help you better use the File Holder field, you can now update the file holder assignment when marking a workstep complete. Because many views and the new pools depend on the file holder being accurate and up-to-date, putting this field in the center of your day-to-day workflow helps ensure your project information is accurate.

Notification Subject Lines

Improved Notification subject lines allow you to make better use of the notification feature, reducing the need to open each notification to understand a notification's meaning and purpose.

Copy Template

The new Copy Template feature speeds up the setup process when you create new templates. If you need to create a new template that is slightly different from an existing template, you can copy the existing template, provide a new template ID and description, make your changes, and save. This feature provides significant time savings for firms that create new templates for additional services they need to track in Workstream.

Non-applicable Worksteps at Project Completion

Workstream now asks how to proceed with closing worksteps that are open when the "Mark Project Complete" process is triggered. If you indicate that worksteps are not applicable, the worksteps are marked as closed by the System Admin in the workstep history, and the program adds a workstep memo indicating the workstep was deemed not applicable.

Adding Forms on Projects

A new Form Due Date selection screen now displays when you add forms in a project. This screen mirrors the Add Forms screen used to configure the firm's list of form due dates. The new screen helps you quickly locate the right forms for the project, ensuring that you are tracking all of the necessary due dates for the project.

Technical Corrections

The following section contains information about technical corrections made in this release.

Views

- Lookup lists in view filters now display in alphanumeric or numeric order.
- The Client Type filter applies when saving project views.

Roll Forward

- Actual Adjusted Hours are now included in the calculation for budgets when rolling forward Prior Year Actuals as the new budget.
- Notification data now clears upon roll forward, and notifications for the rolled project are generated.
- Workstep and Work Object Status links are now retained during roll forward.
- The Budget column for rolled projects now displays the proper budget amount without the initial need to open and save the project.
- Workstep calculation rules for Planned Start and Planned Finish dates are retained during roll forward.
- Situations where firms select "Keep No Roles" and "Keep All Worksteps" now properly reconcile workstep assignments during roll forward.

Route Sheet

- Issues in which certain route sheet areas overlapped have been addressed.
- All pages of a route sheet now print properly when using computers with Windows® 8, Windows® 8.1, and Windows® 10 operating systems.

Other Notable Corrections

- Status changes are now permitted when notifications exist for a project, but there is not an assigned notification recipient.
- Form Due Date changes made on the Edit Project screen now save.
- "Date is Set By" options in templates are stored properly.