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Release Notes

Release 2015-5.0
November 2016

CCH Axcess™ Workstream

Welcome to Workstream 2015-5.0

This bulletin provides important information about the 2015-5.0 release of Workstream. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Project Status Graph Dashboard Pane

To assist in identifying the current status of your active work projects, we are excited to introduce the **Project Status** dashboard pane**.** This pane is a graphical representation of your active projects by status, allowing you to see the workload in each phase of the work cycle. You can configure which projects are included by selecting:

- One or more project types or project templates
- One or more offices

You can exclude any statuses you do not want to include in the graph. You can also click a status to drill down to the list of projects in that status. From the list screen, you have easy access to open the route sheet or project, or to quickly update the project status or file holder.

Client Dashboard Project Pane

When working in the Project pane on the Client Dashboard, you now have additional options on the right-click menu. These new options allow you to work with a project without leaving this dashboard. From the client dashboard, you can easily:

- Create a new project for the client
- Open the project or route sheet for a project to review detailed information
- Open the work object which allows you to quickly access a linked tax return
- Update the status or update the file holder on a project
- Roll forward a project
- Reopen a project

New Project Search

A new **Project Search** view allows you to quickly locate and open a specific project. This view opens automatically when you select the Projects link from the dashboard. Simply select the Client and Project you want to access, and then click to open either the project or the route sheet. This new streamlined view enables you to quickly find a project without having to set up temporary filters in a view.

New Multi-Select Project View Filters

From a project view, you can now select multiple templates and multiple project statuses to include in one view. With this change, you no longer have to set up and switch between multiple views to see key lists of projects.

Additions to Workstream Ribbons

We have added **Update Status** and **Change File Holder** options to the ribbon for a workstep view or form view. You no longer have to return to a project view to select these options from the ribbon.

Action from My Assignments
On the **My Assignments** pane, you can now open a linked work object. This feature allows you to quickly open a linked tax return.

Fiduciary Client Common Data
The client profile Administrative screen has changed for fiduciary clients. The *Fiduciary name and title* field is now two fields, *Fiduciary name* and *Fiduciary title*, to be consistent with the separate fields in fiduciary tax returns.

- Fiduciary name continues to be transferred from the client profile to Tax. For firms that enable the transfer of information from Tax to Client Manager, the name is also transferred from Tax to the client profile.
- Fiduciary title will be added to shared common data, Client Import Utility, Open Integration Kit, and Data Migration Utility in future releases.

Note: For data existing prior to this release, Fiduciary name and title will not separately transfer to the tax return.

Dashboard
The CCH Axcess Dashboard now features a consolidated and simplified design for navigating to other areas of CCH Axcess. You will continue to see only the items that you have installed and for which you have the needed permissions and license.

Changes include:

- Applications and Configuration screens are consolidated into one screen named Application Links.
- Redundant links to Firms Settings and Lists are replaced with one link in the firm section.
- Some links have a more logical name or location.

Technical Corrections

This section contains information about technical corrections made in this release.

Templates
- Template names are no longer required to be unique.
- A template's frequency is now retained when it is changed on pre-existing templates.
- If the tailoring question for **Use worksteps** is set to "no," the budget roll forward rule for the project budget is now changed to **Set at the project**.

Form Date Calculation
Forms 990PF, 990EZ, and 990T now calculate the 2016 second extension date correctly.

Adding a Form to a Project
When adding forms By Entity/By Agency, you can now add just the selected form.

Route Sheet
When entering time from a route sheet, the changes made to your route sheet are now saved.

Views
- The office filter now displays correctly when you import a view that includes an office column and the office filter is set to a different office than your assigned office.
- Sorting now works on all pages of a view.
- There is improved performance for **Update Status** from a view.

Project Assignment Pane
Focus is returned to the selected project in your list when you perform an action on a project.

Export from a View
Exported files will be in XLS format. When opening the file, you will see a message, "The file you are trying to open is in a different format than specified by the file extension…." Selecting **Yes** to open the file will display the exported view.