Wolters Kluwer

Release Notes

Release 2016-3.4
April 2017

CCH Axcess™ Workstream

Welcome to CCH Axcess Workstream 2016-3.4

This bulletin provides important information about the 2016-3.4 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 Actual Start Date
To help you identify how long a project has been open in-house, we have added the project actual start date to the My Assignments and Project Pools dashboard panes. The project actual start date is also available as a sort and search option in both of these panes.

Select Multiple Clients
When you create a new project for multiple clients, Client ID and Sub ID are now displayed as part of the search results.

Form Due Dates
Workstream is currently working on state form due date and extension date changes necessary to comply with the state taxation authorities. These form updates will be coming in a future release. See the list of forms being updated in the Knowledge Base article at the following location: https://support.cch.com/kb/solution.aspx/000057908.

Client Marketing Method
A new field on the Administrative screen of the Client Profile allows you to select how the client was attracted to the firm. You can customize the methods in Client Lists. Client reporting by marketing method will be available in a future release.

Client Notes - Private Notes
In our ongoing efforts to reduce complexity, the *Private note* option has been disabled for new and existing client notes. Only client notes could be set as private. No other note types, such as tax return, project, and billing notes, are affected.

To keep your existing private note contents, you must re-create them before September 1, 2017. All client private notes will be deleted in a future release. To find and review private notes that may exist for your firm's clients, do the following:

1. In Dashboard, click **Reports Manager** on the Application Links window.
2. Double-click **Firm Library > Firm > Client Notes Report**.
3. Set the *Private field name* filter to equal **Yes**.
4. Set any additional settings for the report, such as a date range.

   Tip: Select **Full** for *Display full notes or summary* to include complete note detail.
5. Select to preview or print the report.

Client Responsible Staff - Referring Staff and Prospect Owner
Your firm can now designate one responsible staff type as prospect owner and one responsible staff type as referring staff in Client Lists. A future release will use these designations.

Data Axcess APIs
Data Axcess is a collection of APIs that enable you to programmatically retrieve data within CCH Axcess. The data is centered around Workstream, but also includes Practice and common data. Once an API is consumed and the data retrieved, you can do a variety of things with the data, including but not limited to:

- Creating custom reports that can't be created in the custom report writer.
- Integrating with third-party report writers to create custom reports.
- Integrating with third-party business intelligence platforms to create reports and KPIs.
- Sending data to Excel spreadsheets through .CSV file format.

Data Axcess Utility
The Data Axcess Utility is a program that, upon installation and user authentication, calls available data through the Data Axcess APIs, downloads it, and then extracts it into a local SQL instance. From there, you can run specific queries or connect the SQL database to various tools, such as report writers or business intelligence platforms, among others. The benefits of using Data Axcess include:

- Removing the dependency on a software developer (although some minor technical skills, such as SQL querying, can be helpful).
- Offering automated data retrieval upon installation, with the ability to schedule jobs automatically.
- Having a local SQL instance, which greatly increases the options available for consumption of the data.
- Receiving updated utilities when the updated APIs are released.

To learn more about Data Axcess, contact your sales representative.

Technical Corrections

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

Dashboard
- Sorting by statutory due date now works correctly on the Project Assignment Pane.
- My Assignments no longer requires specific permission to view the projects and worksteps assigned to you.
- Opening and closing a client dashboard no longer causes the My Assignments or Project Pools panes to appear blank. Previously, you were required to select Ctrl + F5 to reload these panes in this situation.
- The changed status date now reflects the current user time zone.

Roll Forward Assignments
When you roll forward a current project that has assigned roles, but the template does not include roll assignments, the role assignments might not carry forward. Whether the roles roll forward depends on the roll forward rules selected. We have added a warning message to inform you when roll forward selections might cause confusion on the new project.

Export View
The Export View is available to export the view definition prior to creating your projects.