

CCH Axxess Workstream

Welcome to CCH Axxess Workstream 2016-4.1

This bulletin provides important information about the 2016-4.1 release of CCH Axxess Workstream. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Reopen Project Worksteps

To provide better control when reopening a project, you can now select which worksteps to reopen. A checklist of worksteps is displayed, allowing you to select only those worksteps that should be reopened. You can also select the project status from the list of statuses valid for the project type. If you decide to cancel the reopen process, Workstream will leave the project and worksteps completed.

Client Dashboard

Client notes in the Client Dashboard now include notes about contacts assigned to the selected client. Both client notes and contact notes may be given a due date, assigned to someone in your firm, and marked complete. A new design allows you to add, delete, and modify notes with fewer steps. You will see three sections of notes:

- **General notes** — Notes without a due date
- **Needs action** — Notes with a due date that are not complete
- **Action completed** — Notes with a due date that are complete

The same notes remain in the client profile and client contact profile, but without the new attributes and layout described above. Changes to the note body, subject, date, category, or staff that are saved while in the Client Dashboard also display in the client profile or contact profile. All note changes made in the profiles also display in the Client Dashboard after the client profile is saved. Private notes are only displayed on the client profile.

Refer to [Client Dashboard Help](#) for details about user rights, how to add Dashboard panes, and how to work with notes.

Technical Issues

Batch Linking Returns and Projects

Batch Project Link now displays a message when linking your tax returns to projects to help prevent duplicate project links from being created.

Delete Multiple Projects

Batch deleting projects now deletes all selected projects.

Roll Forward - Keep No Roles

When projects are rolled forward with the option to keep all worksteps and reset roles from the template, the workstep assignment now correctly displays as unassigned if it is based on a role that is unassigned in the template.

Project Status View

When using the default "Project Status" view filtered for projects with a status of "All," all projects with any status will now display.

Project Budget to Actual Report

This report has been corrected to no longer show duplicate worksteps.