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CCH

Release Bulletin

Release 2013-1.0
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CCH Axcess Workstream

Welcome to CCH Axcess Workstream 2013-1.0

This bulletin provides important information about the 2013-1.0 release of CCH Axcess Workstream. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739. Additional information is available on CCH Support Online, including:

- Release Bulletins
- Your e-*fx*News Profile
- Training Videos
- Speed Tests

Please visit the CCH Axcess Application Status Web page to view in real time the current status of any of the Axcess applications. The Application Status Web page is updated every 15 minutes. You can visit this site at any time, including when support is closed.

Important Note - Action May Be Required

DNS Resolution

The maintenance completed for CCH Axcess may require an additional step for some firms, especially those on versions of Windows earlier than Windows 7. A planned DNS change may prevent you from connecting to CCH Axcess, requiring your DNS to be cleared. If you have an initial problem connecting to CCH Axcess, please do the following:

1. Open a command prompt via **Start > Run > cmd**.
2. Enter **ipconfig /flushdns**.

This will clear your saved DNS and allow you to connect to CCH Axcess. It should not affect any other programs you may run. If you have any additional issues, please contact CCH Axcess Support at 877-977-9739.

Setup, Complete, and Roll Forward Projects

Dedicated Ribbon Setup Area

To improve ease of setup and make it easier for you to locate critical setup features, setup of Types and Templates is in a new area of the ribbon. These ribbon options open a separate window so you can manage your types and templates, while preserving the main Workstream view for managing day to day updates on projects, forms, and worksteps.

This new area on the ribbon also includes the Manage Setup feature, giving you access to all Workstream setup items in a consolidated location.

Inactive Templates

To improvement management of your template list, you can now inactivate a template that you do not currently use. If you choose to create simple templates today, and move towards more advanced templates in the future, you can now make simple templates inactive. Inactive templates remain in your data as a point of reference for historical projects.

This also allows you to create or edit templates while other staff are in the program creating projects, without risking the use of an "in process" template or a wrong template.

You can also keep the CCH default installed templates as a point of reference, even if you do not intend to use them immediately. The inactive feature prevents staff from using an incorrect template that is kept for reference purposes only.

Create Project - Client Lookup

You can now set Client ID as the default search option when creating projects.

Reorder Worksteps Utility

We added a new utility to make it easier for you to reorder worksteps on your projects. You can update more than 100 worksteps at a time, if necessary.

Note: You can reorder worksteps for a single template's projects. When you open the utility, the program prompts you to select a template, allowing you to reorder worksteps for projects associated to that template. You can rerun the utility to reorder worksteps for another template.

We also removed the ability to reorder worksteps on the route sheet. This ensures that you always see the worksteps in the order specified in the project.

Reorder Milestone Dates

Milestone dates on templates and projects now inherit their order from the Milestone Dates list in your firm settings. If you change the order of your milestones list at the firm level, templates and projects inherit that new order. If you add a new milestone to a template or project, the milestone appears in the order defined in the firm list. This makes it easier to add milestone dates to your projects, ensuring that the milestone dates appear in the appropriate position in the list.

Quick Create

Based on your feedback, we removed the Quick Create feature. This gives you a single method of creating full and workable projects, with no further work needed.

New Roll Forward Process

To streamline the setup process and ensure consistency, roll forward rules are now set at the template level. You will only see roll forward rules in the template. We will make further improvements to this area in May 2014 to provide more options at the point of roll forward.

Automatic Roll Forward - Additional Options

You now have the option to "decline" an automatic roll forward for a project. You can display the Roll Forward Approver view and opt to decline the roll forward, thus removing any unnecessary projects from your view. This promotes easier review of the projects in the view that truly need approval and eliminates projects that do not merit a review.

Roll Forward Approver Notification

To promote easier use and setup of roll forward rules, you now setup the roll forward approver as a notification. Setting up rules is more intuitive and allows staff to more easily understand that the rule determines who is notified once approval is needed. It does not restrict which staff can approve the roll forward.

Forms

Forms Library - Non-Imported Forms

The CCH Forms Library now only shows forms not currently used by the firm. Forms you have already added to your firm library no longer appear in the CCH Forms library. You can now search to ensure that you added all appropriate forms to your firm library and locate forms you may have missed.

Reimport Forms - Update Due Dates

The new Reimport Forms feature checks the master CCH Forms Library for updates to due date calculations, and then allows you to apply updates to forms in your firm list of form due dates. This ensures that you do not have to manually reconcile and locate forms with changes. The program reconciles the forms you have imported into your library. You will receive an additional prompt asking if you want to update open forms on your projects to reflect the new dates. You can now update more than 100 forms in a batch.

Entity and Agency - Custom Forms and Views

To make it easier to import forms from the CCH Forms Library, Entity and Agency are available as filters and search options on the Add Forms screen. This saves time when searching for forms to add to your firm list of forms.

As an added benefit, you can now add an entity and agency to custom forms you create for your firm. You can search by agency wide view that shows all forms, not just forms from the CCH Forms Library.

Agency is now available to you as a column in the form views. If you need to search for all forms for a specific agency, you can now easily see that information in the view.

Roles and Worksteps

Update Roles and Worksteps Assigned by Role - Messaging

If you assign worksteps using role assignments, improved messaging provides clearer insight into any additional changes you need to make when updating role assignments. In some situations, the role assignment or role changes will not update the workstep. These new messages identify worksteps that are not updated, ensuring that you know when further workstep level updates are needed to keep assignments up to date.

Mark Worksteps Complete - Order and Status Updates

If you select and mark a group of worksteps complete, the program marks the worksteps complete in the system defined order, regardless of the order on the route sheet or the view. This order is also reflected in the Status History screens if the completion of the workstep triggers a project status update. The appropriate history is in the right order of completion, if you need to research completion dates and status history for a worksteps or the project.

Update Multiple Worksteps

You can now update workstep assignments using Update Multiple, making it easier to update staff when changes are needed for groups of projects.

Tracking Projects - Views, Route Sheet, and Navigation

Update Status Dialog - Access Route Sheet and Update Fileholder

The Update Status dialog now includes the Fileholder field and Open Route Sheet button. If you update status from a Workstream view, the route sheet, Dashboard, or CCH Axcess Tax, these extra options appear.

This creates tremendous efficiency by eliminating the need to open the route sheet before or after closing a CCH Axcess tax return. This also allows you to change a file holder without opening additional screens when closing a CCH Axcess tax return.

You have one screen access to the fields most commonly updated in conjunction with a manual status change. Also, if you realize you need to open the route sheet while making these changes, you have a shortcut to the route sheet via this screen.

Views - Export to Excel

You can now export all rows on all pages to Microsoft® Excel from all Project, Workstep, and Form views instead of page by page. If you need to do further analysis on the information in your view or use the information for import into another system, the process is much faster and simpler.

We also focused on Export to Excel performance improvements in all views that ensure faster exports, regardless of the volume of items in your view.

Workstep Views - New Columns

Completed By is now available as a column in Workstep views. This makes it easier to identify who completed a workstep. If you need a listing of all worksteps for a group of projects and need to know who completed the steps, the view now supports this type of listing with the necessary completed by information.

Ribbon Navigation and Right Click Menu

To make it easier for you to locate the right features as quickly as possible, we reorganized the ribbon at the top of the main Workstream screen and the right-click menus. New ribbon tabs better organize the features. New sections and icons in the right-click menus help you quickly locate features. Contextual ribbon tabs and right-click menus, dependent on the type of view selected, ensure that you only see functions that apply to the type of view you are using.

As an added bonus, you can now open the route sheet for any type of view from both the ribbon and the right click menu.

Linked Projects

You can now select and update the status of multiple projects, even when the projects are linked to tax returns. This saves you time by allowing batch updates, rather than project by project updates.

Technical Corrections

Assignments

- You can now remove a role and add the role back to the project at a later date with proper updating and no error messaging.
- Client Responsible Staff assignments now update workstep assignments without opening the assignment tab of the workstep.
- If you set a file holder in a template, the assignment saves and you see this assignment in newly created projects.

Create, Edit, and Roll Forward Project

- When you roll forward a project, worksteps maintain their associated project status update settings. Only one workstep is tied to an individual status.
- Information entered in Actual fields on the Budget and Financial screen save and persist when you tab to move between fields.
- New Workstep order saves in your templates.
- If you reopen a project, all worksteps and forms remain completed unless you make a specific choice to reopen.

Notifications

- Notified and Sent columns update when notifications are sent to recipients if the recipient was a manually entered email address rather than a staff, role, or workstep selection.
- Recipient information displays for all projects in a multi frequency series, for example, on all Quarterly or Monthly projects in a series.
- When deleting notifications, only the selected notification is deleted, regardless of assignment.

Route Sheet

- You can open the route sheet from workstep notifications.
- As a CCH Axcess Tax user, you can now open the route sheet from Tax without additional security permissions.
- Route sheets now open showing the top of the route sheet.
- Assignment budget hours now display for worksteps.
- If you open the Notes pane from the route sheet, the Notes pane now closes when you close the route sheet.
- The program now prompts you to save changes, even if your change was a new note added by opening the Notes pane from the route sheet.

Tracking and Managing Projects - Views, Dashboard, and CCH Axcess Practice Time Capture

- If you override a due date on a form, the override due date now displays on the Dashboard.
- Project Assignment pane on the Dashboard displays a record for each assigned project, regardless of the number of linked work objects.
- We made key performance and speed improvements for the Project Assignment pane on the Dashboard.
- Completing a project from the ribbon no longer displays an error message.
- When you create and export a view, filter keywords are updated for other staff who import the view.
- Completed Project view now displays correct filters in the filter pane.
- Today keyword now updates, regardless of when you created the view.
- In CCH Axcess Practice, if you select a project, but do not select a status update, the program keeps the current project status.
- Project Status updates you make from the route sheet now display in views without needing to refresh the view.
- Deleted projects are now removed from view filters.
- If you opt to change project status when entering time or expense transactions, and subsequently mark a workstep complete that also updates the project status, the Project Status change will take precedent. We expect to make further changes to this in May 2014.