CCH Axcess™ Workstream

Release 2012-3.4.1

May 2013

CCH Axcess Workstream Release Bulletin

This bulletin provides important information about the 2012-3.4.1 release of CCH Axcess Workstream. Please review this bulletin carefully prior to installation. If you have any questions, please call Account Services at 1-877-977-9PFX (9739) or contact support online at http://support.cch.com/suite.

The following website provides important information about this release:
http://support.cch.com/Suite/ReleaseNotes/

By accessing this site you can view such helpful information as:

- Release Bulletins for this and other products
- CCH Axcess Support Calendar

Please visit the webpage CCH Axcess Application Status to view in real time the current status of any of our Axcess applications. The Application Status webpage is updated every 15 minutes. You may visit at any time, including when support is closed.

NEW IN THIS RELEASE

Enhancements

- **CCH Axcess Tax Route Sheet Integration** – If you license CCH Axcess Tax and you link your returns to Workstream projects, you can now launch the tax return via a link on the route sheet. You can launch the route sheet from the Dashboard Notifications or Project Assignment pane. The route sheet is also available from CCH Axcess Practice Time Capture and the main Workstream application. You save lots of time by accessing the return via the route sheet, as opposed to opening Tax Return Manager and searching for the appropriate return and year.

- **Update Multiple Worksteps** – A new Update Multiple Worksteps feature enables faster editing of worksteps when you need to make mass changes. This feature helps when you need to update the Name, ID, or Assignment of a group of worksteps. This improves productivity by allowing you to make changes to groups of worksteps, rather than editing the worksteps one by one.

- **Role Based Workstep Assignments** – We have improved the process of assigning worksteps via roles. You can save clicks by assigning roles at the project level, then using roles to staff your worksteps. As you add a role assignment to your workstep, the workstep will inherit the role assignment from the project. If you edit the project role assignment, worksteps with that role assignment update automatically. This relationship exists when you update assignments in the Master, Project, route sheet, and from update multiple when you update roles.

  ***Note*:** If you assign multiple staff to a role, you will need to manually update associated workstep assignments.

- **Form Due Date Selection and Update** – A brand new Select Forms Dialog provides faster navigation when searching for various due dates for forms you prepare and track. This saves you time during initial setup when trying to locate forms to add to your firm library. This also saves you time when you need to reimport forms as a result of CCH updates to due date calculations. The screen is now resizable for improved navigation and viewing.

- **Form Due Date List** – In conjunction with the new Select Forms Dialog, the Firm Form Due Date list was also improved for ease of navigation. A Find button facilitates faster location of specific forms you need to edit in your library. An extra scroll bar was removed to improve scrolling on the screen.

- **Roll Forward Simplification** – Based on your feedback, we simplified navigation in the roll forward process and roll forward rules:

  - Roll forward now recognizes issues and discrepancies with dependent data options. For example: roll forward will stop if you choose not to roll forward roles, but you roll forward worksteps which are staffed based on role assignments. The roll forward process now sees this as an issue, notifies you, and allows you to take corrective action before attempting roll forward again.
  - Removed the Keep Some option in roll forward rules.
  - Removed the ability to create duplicate projects via roll forward.

- **Create and Edit Simplification** – Based on your feedback, we simplified navigation in the create and edit project process:

  - Removed **Quick Create** as an option when linking Workstream projects to Axcess Tax Returns or ProSystem *fx* Engagement binders.
  - Removed the **Create and Edit** option on Create Project screen.
  - Removed **Last** period tabs throughout the program.
  - Removed the workstep option to calculate the budget.
  - Removed the requirement to enter an extension date when creating and editing form due dates.
  - Removed Estimated Percentage Complete from the Edit Project screen. You can still manage this information from the individual worksteps in CCH Axcess Practice Time Capture, the route sheet, or views. You can also see summary information via Report Manager.

- **Master Becomes Template** – Based on your feedback, we have changed the name of Master to Template. This change is reflected in all portions of the CCH Axcess Suite and ProSystem *fx* products. Based on conversations with customers, the name template more accurately conveys the meaning and purpose of this component of the product, and this terminology change will reduce the learning curve associated with setup and management of "templates."

- **Print and Preview Reports** – To speed up the process of previewing and printing reports, you now have the option to Print or Preview reports directly from the Report Options screen in Report Manager. This eliminates clicks and helps you get to your completed report faster.

- **Custom Fields on Reports** – To enable more detailed Custom Client List reports, you can now add custom client fields when you create a custom Client List report in Report Manager. This allows you to further customize the standard report to use these important fields. Similarly, we have added Project Notes as available fields on the Project Summary custom report, so you can access this important information when customizing this report.

- **Client Notes on the Client Dashboard** – Client notes are now available via the Client Dashboard. You can access and create client notes more efficiently using the Notes feature available via the Client Dashboard. This saves you multiple clicks and provides more transparent access to this information without requiring you to launch the Client Profile.

- **Search by Client ID and Sub-ID or Sort Name in Client Manager** – Client Manager now allows you to search for a client by client ID and sub-ID (optional) or by sort name simultaneously. You no longer have to choose a search option. If using both client ID and sub-ID, you can separate the IDs by entering a period between the ID and sub-ID, for example, 14350.01. If you enter the full client ID, client ID.sub-ID (if used), or sort name when you perform the search, the client profile opens automatically.

- **Adding Clients to Access Groups** – Client access groups now contain filters to assist you when searching for staff and clients to add to the group. This saves time and clicks involved when manually searching for and selecting staff and clients.

Technical Corrections

Technical corrections made with this release include:

Roll Forward

- You can save and edit projects without permissions to roll forward projects.
- Workstep and milestone date relationships are preserved in the roll forward process.
- Projects that have been rolled forward no longer display in the Roll Forward Approver view.

Worksteps

- Marking the last workstep complete from the route sheet prompts you to close the project.
- Workstep notifications remain in place if you set the priority to No Selection while changing recipient information.
- Role based notifications in worksteps save and update properly in templates.
- When completing a workstep, all appropriate Completed information displays in views and on the route sheet if selected.
- Keying time in CCH Axcess Practice to a completed workstep does not reopen the workstep.
- Updates to workstep order via the route sheet save and display throughout the program.
- Marking a workstep complete only updates the Completed by information for that workstep. If you mark a workstep complete from the route sheet, all information saves and displays in appropriate areas of the program.
- You can choose not to select the service code setting on worksteps.