

Frequently Asked Questions

[General](#) | [SaaS](#) | [Migration](#) | [Tax](#) | [Document](#) | [Portal](#) | [Practice](#) | [Workstream](#)

General

What is the next generation of the ProSystem fx Suite?

The next generation of the ProSystem fx Suite is a set of robust products and services that will be delivered on a dynamic, centralized, platform to help you connect to your clients, your staff and your data. Through extensive customer feedback and involvement, we have developed the next generation of the ProSystem fx Suite to meet the growing demands of the mobile workforce.

How is the new ProSystem fx Suite different from the existing platform – The ProSystem fx Office?

The new ProSystem fx Suite platform is completely new, built with Microsoft's .NET 3.5 Framework from the ground up. The enhanced suite will first be made available as a SaaS (Software as a Service) deployment, hosted by CCH.

The new platform provides enhanced integration, centralized management and increased portability.

Rest assured CCH is continuously developing new features and enhancements for the on-premise, client server, or network version of the ProSystem fx Suite, giving you the functionality needed to get the job done, on whatever platform you prefer.

Is the database different?

Yes. The new database is a single common database for all ProSystem fx Suite products. The common client database helps reduce data entry and ensure accurate client information that is consistent across the suite.

Which products are being released on the new platform?

The following ProSystem fx products will be included on the initial release: Tax, Document, Portal, Practice, and Workstream.

When will the new products be available?

SaaS versions of ProSystem fx Tax, Document, Portal, Workstream and Practice will be released Q4, 2009. On-premise versions will be available in 2010.

What are the key features and benefits of the new suite?

Features and benefits for each product are specified below:

- **Reduce data entry and ensure accurate client and staff information.** A common client database will streamline and simplify updates to client and staff information, improve efficiency, and maintain consistency across the suite.
- **Streamline administrative processes.** A central Administration Manager lets you set up and maintain users, security and firm preferences across the suite.
- **Work more efficiently.** A Smart Client application will provide richer user interfaces, more powerful performance, and faster load times. The Smart Client can be installed easily on a large number of computers with no user intervention.
- **Simplify implementation.** Our hosted products will reside online, so your firm will have access to the most current version of the software, automatically. An update manager will notify you when a new version is available.
- **Move seamlessly between applications.** Your staff will be able to sign in one time to access multiple ProSystem *fx* products, with Single Sign On (SSO).
- **Get up to speed faster with a familiar interface.** A common look and feel across multiple ProSystem *fx* applications will improve ease of use. In addition, the ribbon-style menus will leverage your staff's familiarity with Microsoft® Office 2007.

SaaS

What is Software as a Service (SaaS) model, and what are some benefits to me?

SaaS is a software deployment model in which an enterprise application is delivered and managed as a service by the vendor to meet the needs of multiple customers simultaneously. SaaS solutions are delivered via the Web, which provides the additional benefit of anytime/anywhere access.

The SaaS model:

- Shifts the burden of keeping an enterprise application up and running from you to CCH.
- Lets you leverage CCH software functionality without the burden of deploying and managing the software yourself.
- Eliminates the added costs and complexities of deploying additional hardware and software, or dedicating additional staff resources to support the enterprise application on an ongoing basis.
- Enables you to benefit from CCH's latest technological features without the disruptions and costs associated with software updates and upgrades.

I understand that the SaaS version of the ProSystem fx Suite is being released in 2009. When will the on-premise software be available?

CCH will provide an on-premise version of the ProSystem fx Suite beginning in 2010.

How easy are the new products to install?

The release of the ProSystem fx Suite is provided as a CCH hosted solution, allowing you to simply download a Smart Client onto your workstations or laptops and begin working. Although IT involvement can be minimized, some sites may elect to have their internal IT departments work with staff on the initial installation.

Will firms be able to maintain the new products without IT involvement?

Hosted Software as a Service is designed to greatly reduce – if not eliminate – time and involvement needed for maintenance. An update manager automatically checks for new software, so you will always have access to the most current version of the Smart Client.

Migration

What can I do to prepare for migration?

You can utilize the Data Analysis Tool [DAT] to help ensure that only valid client information is included in your databases and that your common data is consistent across all products. If you have only one CCH product, you can still use the Compare process to compare data for the same product in multiple databases. For example, if you have multiple offices, you can use the DAT to ensure your data is consistent across all offices. If you don't have multiple CCH databases, you do not need to run the Compare process; however we recommend the Verify process for all customers. This tool will not modify your data; it is used for analysis and reporting purposes only.

The tool can be downloaded from the ProSystem fx Support Web Site. More information is available at <http://tax.cchgroup.com/dat/default.htm>.

What is the Data Analysis Tool?

The Data Analysis Tool is an analysis and reporting tool that you download, install and run for two primary purposes:

1. To **verify** that only valid_data is included in your ProSystem fx database(s).
2. To **compare** common data, client and staff, that exists across multiple ProSystem fx products .

Should I wait until closer to migration to run the Data Analysis Tool to ensure consistency across all my common client and staff data?

We recommend running the Data Analysis Tool now. You can run it again later to identify any new items that require analysis. When you run it the second time, it will only identify incremental items not identified previously.

Will the Data Migration Utility replace the Data Analysis Tool?

The Data Migration Utility is an expanded version of the Data Analysis Tool. However, using the Data Analysis Tool before the Data Migration Utility becomes available will streamline the process.

Tax

Will Global fx customers migrate to the SaaS version of ProSystem fx Tax?

Global fx Tax will continue to be maintained through tax year 2009 with customers migrating to the next generation of ProSystem fx Tax during 2010. All Global fx Tax users will be on the new SaaS version of Tax for tax year 2010. In addition, current ProSystem fx Tax customers may migrate to the SaaS model if they desire to take advantage of the benefits of SaaS and the common client database, as well as the enhanced capabilities of the program.

What is the conversion like from Global fx to the next generation of ProSystem fx Tax?

Existing customers should be using the Data Analysis Tool to clean up their data and all customers will need to 'migrate' their data from Global fx to the next generation of ProSystem fx Tax. A data migration utility will lead you through migrating returns, clients, office groups, signers and staff.

Are all legacy features included in the next generation of ProSystem fx Tax?

We have dropped the support of certain low usage features, like facsimile view and interview form print, based on feedback from our customers. Instead, we have worked closely with our customers to design and develop enhanced features and functionality that will allow you to do your job in a more efficient manner and provide more information at your fingertips.

Will the next generation of ProSystem fx Tax reduce the time required for me to process a return?

Yes, it will. Some of our new features will save your firm time, such as the ability to customize your client correspondence or your print sets or the ability to print to multiple destinations by copy type.

Will the Tax interface look different? How so?

We have used the user interface for Vista and Office 2007, so we now have a 'ribbon' instead of the classic File/Edit menu items. However, the content on each Worksheet remains the same.

What are the key features and benefits of the next generation of ProSystem fx Tax?

- **Simplify on-screen review.** On-screen reviews will be more efficient, with features that will include expanded tickmarks and diagnostic sign-offs.
- **Create customized views.** Customize the information you want to see about returns with enhanced Return Manager functionality.
- **Improve client communications.** Build professional correspondence from templates and edit in Microsoft® Word. You'll have complete control over client correspondence.
- **Save time when printing returns.** Create print sets, send to multiple destinations by copy type, insert objects and add watermarks.

Document

Will Document ASP customers migrate to the SaaS version of ProSystem fx Document?

It is our desire to migrate all Document ASP customers to the next generation SaaS version of ProSystem fx Document by December 31, 2009. Document ASP will no longer be available beginning January 1, 2010. In addition, it will be possible for current on-premise Document customers to migrate to the SaaS version of ProSystem fx Document if they desire to take advantage of the benefits of SaaS and the common client database, as well as the enhanced capabilities of the program.

What is the conversion like from Document ASP to the next generation of ProSystem fx Document?

The conversion process should begin by running the Data Analysis Tool ahead of time to assure your common data is ready to migrate to the new system. A data migration utility will be provided which will allow you to move your data from Document ASP to the next generation SaaS version of ProSystem fx Document. Additional guidance and support will be available to assist you through this simple process.

Are all legacy features included in the next generation of ProSystem fx Document?

Yes, all legacy features will be included, and new features have been added. In fact, functionality will greatly improve with the next generation of ProSystem fx Document.

Will the Document interface look different? How so?

Yes, the next generation of ProSystem fx Document is built on Windows Presentation Foundation (WPF) instead of the Internet Explorer platform used in Document ASP. WPF provides a rich user experience and improved usability when compared to Internet Explorer.

What are the key features and benefits of the next generation of ProSystem fx Document?

- **Streamlined document management.** E-mail URLs that directly link to a file saved within Document; simultaneously import multiple files; or save any document to multiple entities, clients or projects.
- **Find documents more easily.** Effortlessly find documents and files using intuitive search functionality similar to Microsoft® Outlook.
- **Manage email messages.** Group email threads and manage email history to gain a clearer picture of your firm's correspondence with clients.

Portal

Are all features of the Document ASP Client Portal included in the stand-alone Portal product?

The stand-alone version of the Portal does not have file versioning. When integrated with the next generation of Document, versioning will take place in Document. Document Discussions, a seldom used feature, has been dropped from the new Portal product.

How will ProSystem fx Portal be different than what is currently available?

The current Document Client Portal solution is only available as an add-on module for Document. The new Portal still has tight integration with Document, but can also be used as a standalone application. Here's a look at the functionality of the Portal:

- Bi-directional upload/download
- Automated password reset
- Post to multiple portals at one time
- Email notification when a document is posted
- Ability for firms to manage licensing for their clients to give temporary access to a bank or other entity
- One login gives access to all portals the login has been granted permission to view collaboration area

Firms using ProSystem fx Portal with ProSystem fx Document have the added benefit of:

- The ability to track file versions
- Custom folder creation capability
- Integration with the Administration Manager and the Common Client Database with the SaaS version of ProSystem fx Document
- The ability to easily publish/un-publish files to Portal from ProSystem fx Document and download files from the Portal to ProSystem fx Document.

How secure is information both within Portal and while it is being transmitted over the internet?

ProSystem fx Portal utilizes 256-bit, Secure Socket Layer (SSL) encryption with password protected access.

Documents are encrypted before being passed over the internet and while being stored on the Portal.

Documents are hosted on a Business Logic Layer, so a username and password are required to access files. In addition, documents added to Portal are scanned for viruses before being uploaded. All files are maintained behind firewalls to protect against outside intruders.

Previously, ProSystem fx Document was required in order to use the Client Portal. Will Document be a prerequisite for the new ProSystem fx Portal?

No, ProSystem fx Portal is a stand-alone application that is tightly integrated with other ProSystem fx products. Enhanced Portal functionality is available at no additional charge when integrated with ProSystem fx Document.

Practice

Which Practice product was rewritten and who will be able to migrate to the new product?

The best features of both products, as well as new features and enhancements, were brought together into the ProSystem *fx* Practice product developed on the new platform. Customers on either platform will be able to directly migrate to the new on-premise product in Q4 2010, though there will be opportunities for clients to adopt and migrate to the SaaS model earlier (additional migration details will be available in the coming months).

What is the conversion like to the next generation of ProSystem *fx* Practice?

The data migration utility will be delivered to our foundation customers when they order the new Practice product. There is no charge for this utility and it will be run by firms in their own offices. They will have access to help through our Practice support team.

In preparing for the migration you can utilize the Data Analysis Tool [DAT] to help ensure that only valid client information is included in your databases and that your common data is consistent across all products.

What are the key features and benefits of the next generation of ProSystem *fx* Practice?

- **View all Practice data in one place.** Configure various views in the centralized ProSystem *fx* Suite dashboard to view important practice information, such as client billing and A/R notes, notifications of bills ready for review, employee productivity graphs, and other employee statistics.
- **Easily manage time entry.** New options include the ability to set up a review process for employee managers, enter estimated time remaining on projects, use a designated input field for work location that captures information for sales tax reporting, enter reasons for overriding a standard rate, or view CPE tracking and historic bank hour entries.
- **Simplify billing and invoicing.** Bill groups of clients, post multiple invoices for one client, and more. Creating and applying progress bills are much more robust, allowing these bills to go across engagements and projects.
- **Streamline set-up processes.** In setting up client and employee information, the design leverages template set-up to make adding clients and employees a snap. We have included more customization so that your firm can determine the structure of client managers as well as your own preferences for the manager labels.

Will Project Management capabilities be included in the next generation of ProSystem *fx* Practice?

We have enhanced our project management modules from both of our foundation products and rolled our enhancements into a new product: ProSystem *fx* Workstream. This product will integrate with all of the products in our new Suite. Like our new Practice, it has the best of all of the features of our foundation products and includes new enhancements as well.

Will Workstream be included with the next generation of ProSystem *fx* Practice?

We have developed Workstream as a stand-alone product. Workstream is designed to have tight integration with our Practice product as well. This includes enhanced integration points in particular with Time Capture, Clock, Billing and A/R.

What are the advantages of Workstream over the Project Management Modules in the foundation practice products?

Unlike most workflow products that do not have the capability of following the size and complexity of diverse projects, Workstream provides complete scalability for the scope of its projects. For instance one department may only need a due date monitoring system with notifications for each milestone of a project such as a tax return, while another department may need many complex steps of the project including budgets for each step with actual-to-budget reporting. Workstream includes greater proactive controls utilizing notifications and automatic updates, greater scalability by use of project types (include or exclude project features) and more control of standardized project attributes by use of locking template features.

Workstream

What is ProSystem fx Workstream?

Workstream is a new ProSystem fx product that combines the functionality of workflow and project management systems to help you manage work projects with deadlines.

Project set-up has been designed to be entirely scalable for any size firm. Global decisions can be made to define the complexity of each type of project based on master templates that fit the standard processes and procedures of your firm.

While Workstream can be purchased and used by itself, the power of Workstream is realized when combined with other products. With access to project information from all areas of the suite, your staff can reach out for information about their projects to record and update project information without interrupting their work or leaving the application in which they are currently working.

Workstream also has the ability to automate processes, including notifying key contributors about the health of a project. Examples include percentage complete, planning dates, milestone dates, unassigned work and more.

What are the different versions of Workstream?

Our Premier version of Workstream is all inclusive. Our Basic version of Workstream excludes worksteps which provide budgeting per each step of the project. This would be needed for audit projects for instance. Although there is an electronic route sheet, the customizing options are not available. There are notifications triggered by worksteps that are not included in the Basic version.

Can I use Workstream this year if I don't switch to the SaaS versions of the ProSystem fx Suite?

Yes, this product can be sold as a stand-alone solution.

What are the key features and benefits of ProSystem fx Workstream?

- **Save time with scalable templates.** Set up master templates to match the complexity of the project. For example you can setup a template to simply manage the status of a tax return or detailed work steps and budget to actual hours for an audit.
- **Stay up to date on changes.** Notifications can be set up to notify managers of a change in status, when deadlines are missed, and more.
- **Update projects from anywhere.** Workstream is designed to allow staff to update project info while working anywhere in the ProSystem fx Suite without having to switch applications, improving your efficiency.