



# ProSystem fx® ActiveData™

Simplify Your Data Analysis within Microsoft® Excel®

CCH is Advancing Business with Best in Process™ Solutions, Delivering Faster Answers and Better Results.

ProSystem fx® ActiveData™ is a Microsoft® Excel® plug-in that adds more than 100 features to Excel®. It enables you to easily analyze data and provides new levels of information control. It has built-in functionality specifically designed to meet a CPA's needs. Special features allow you to merge, match and compare sheets, in order to analyze duplicates and detect gaps for top and bottom performance analysis and more.

In addition, ProSystem fx ActiveData provides easy audit fraud detection and analysis, reducing your training needs for a quick return on your investment. Immediately transform hard-to-use data into usable data to increase the volume of your core business.

## Redefining Data Analysis

Make everyday testing more efficient. ProSystem fx ActiveData lets you automate the process you use to compile all data received from your client, and streamlines the process of sorting through the data to find areas prone to risk. Powerful data analysis features let you:

- **Query, Tag and Select Rows** — Quickly find items over scope or identify a certain type of journal entry in the G/L data with the Query Sheet feature. You can even sample the remaining population by using row tagging to move individually significant items from the population into another worksheet.
- **Merge, Match and Compare Sheets** — If your client's G/L system provides multiple worksheets, but you need information on one sheet, use ActiveData to gather the data you need.
- **Combine Sheets** — Quickly combine trial balances from multiple divisions or locations into one.
- **Sort, Summarize, Sub-Total, and Split Data** — Summarize invoices by customer name, and use the split feature to disaggregate data to view by location or month, year, day of the week, etc.
- **Sample and Stratify Populations** — Avoid additional and unnecessary selections by stratifying the sample, and identify characteristics of the population, such as unusual items.
- **Detect Duplicates and Gaps** — De-dupe your data and find gaps in sequenced items, such as check and invoice numbers to ensure completeness and accuracy of the population.

**“ProSystem fx® ActiveData is one of those tools we might not use every day, but when we do, we wonder how we ever managed without it! I love how it immediately transforms hard-to-use data into usable data and directly imports it into ProSystem fx® Engagement. It's well worth the investment given the hours of time we've saved.”**

— Kevin Krueger,  
Owner, Krueger & Associates, P.A.

## Easy-to-Use Integration

ProSystem fx ActiveData simplifies your data extraction and analysis by leveraging a tool you already use — Microsoft® Excel®, making your current Microsoft® Excel® processes more effective and bringing data analysis to all your auditors' desktops.

This tight integration presents a substantially lower learning curve than other products on the market, so you can be more productive from day one. In addition to its integration with Microsoft® Office, ProSystem fx ActiveData can be leveraged alongside ProSystem fx® Knowledge Coach for a fully-automated audit process.



## Simplify Your Fraud Detection and Risk Analysis

When your staff audit client data, they are looking for a pattern within the transactions that will help determine whether a deviation is indicative of fraud or of an anomaly. Manually comparing data against a list of common risk symptoms could take months to finish and is susceptible to errors. But with ProSystem fx ActiveData, you can:

- Analyze client data within Microsoft® Excel® in minutes using easy, automated functions.
- Adopt a consistent methodology for identifying high-risk data based on impact and likelihood for failure.
- Understand how to efficiently detect errors within client data and mitigate the risk of errors.

## Eliminate Manual Calculation

As an auditing professional, you need tools that work the way you do.

Simplify your account and financial data analysis with more than 70 ProSystem fx ActiveData functions that let your staff manipulate data, perform complex calculations, and manage Microsoft® Excel® workbooks and files. The result is a better understanding of client data and increased opportunity for analysis. Most functions don't change the original worksheet, and you can track what has been done to the worksheet and by whom.

ProSystem fx ActiveData:

- Is easy to learn and cost-effective, at about one-quarter the price of the competition and requiring one-quarter of the training time.
- Supports greater accuracy and efficiency.
- Saves time by relieving you of manual calculations.

This high speed and high performance data analysis and manipulation tool can support up to a million rows of data with Microsoft® Office 2007, and your reports are published right into Microsoft® Excel®.

## Easy Implementation

Where other data analysis solutions take weeks to learn and master, most ActiveData users are up-and-running on their first day. Once installed, ProSystem fx ActiveData's functions are available directly in Microsoft® Excel® as an additional pull-down menu.

## Implementation Consulting and Staff Training Set the Stage for Success

As with all CCH products, training and consulting services focused on product usage, best practices, and methodologies are available to help your firm achieve the highest return on your investment. The CCH Training and Consulting Team will assist you in incorporating ActiveData into your daily workflow.

Additionally, learn invaluable techniques that can be immediately implemented with measurable results by attending the CCH® Learning & Development Academy — School of Audit. Three essential types of training are provided — technical accounting, software tools, and professional skills — woven into one curriculum designed for maximum impact.

## Maximize Efficiency Through Seamless Integration

Our accounting and audit suite includes all of the functionality needed to run an efficient, paperless audit, including workpaper storage and management, file sharing, remote access and synchronization, roll-forwards, management diagnostics, trial balance management, financial reporting, and more!

Contact your CCH Account Representative to learn more about how CCH's accounting and audit workflow can help you provide an even better experience for your clients.

Workflow solutions include:

- Accounting Research Manager®
- ProSystem fx® Engagement
- ProSystem fx® Knowledge Coach
- ProSystem fx ActiveData
- ProSystem fx® PDFlyer™
- ProSystem fx® Portal
- ProSystem fx® Document
- CCH® KnowledgeConnect™

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/ProSystemActiveData](http://CCHGroup.com/ProSystemActiveData). If you plan to use multiple ProSystem fx Suite products within the same system, call 800-PFX-9998 (800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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