



ProSystem fx® Document — Consulting and Training

Discover how to maximize your firm's competitiveness, while minimizing liability.

CCH® Training and Consulting make it possible for your firm to get the most out of ProSystem fx® Document. Our training and consulting solutions are tailored to fit your firm's unique needs, allowing you to realize the full value of investing in a document management system.

The CCH consultant will engage with your firm's decision makers to develop workflow processes that will give the firm a competitive advantage by reducing professional liability and maximizing operational efficiency. Our training will give your staff the knowledge needed to begin using Document immediately. Customized sessions are also available, such as a Record Retention Consulting session.

Apply a Documented Retention Policy

Reduce the firm's professional liability by enacting and consistently applying a record retention policy. Your consultant will help you identify a systematic approach by which to destroy electronic records once they are no longer useful. Where a formal retention policy does not exist, the consultant can provide assistance with developing one by drawing on years of experience. It is important to note that regulatory agencies, legislative bodies, standards committees and liability insurance carriers may make certain requirements of the firm's record retention policy.

Take the Firm Paperless

Take charge of your firm's transition from a paper-based workflow to a truly paperless workflow. While ProSystem fx Document enables you to go paperless, your firm's existing workflows and processes may not allow you to take full advantage of the paperless abilities and features. The CCH consultant will assist you in identifying and documenting changes to your processes that will allow for a smooth transition, resulting in more being accomplished in less time.

Establish a Superior File System

The CCH consultant will examine how you currently store your files and help translate this structure into an efficient and easy-to-use file management system in ProSystem fx Document. Draw from the CCH consultant's experience for best practices on how to configure Document's numerous search and collaboration features so that searching for any information is quick, intuitive, and easy.

Go Beyond Client Files

To truly realize the efficiencies of a document management system, it must not be limited to only one type of information. An experienced CCH consultant will work with your firm to develop unique workflows, determine security needs and facilitate the advanced software setup needed to create a comprehensive solution that goes beyond client files and manages all of the firm's valuable electronic information.

Empower the Firm's Staff

Ensure that the appropriate files are easily accessible to staff who will be working with them, while restricting access to certain files, as needed. You can configure the system so that staff members who need to collaborate on files have the ability to do so.

Work with your CCH consultant to create groups of users with different file access/functional rights, so your staff can accomplish all tasks the new workflow requires of them.

A staff well-trained in the use of ProSystem fx Document can maximize its impact in terms of increased efficiency for your firm.

Consulting and Training Services

Course	Description	Who Should Attend
Best Practices Consulting	This course focuses on ensuring a smooth and successful implementation of ProSystem fx Document by addressing not only the configuration and security settings of the software, but the workflow and firm policy that must be adjusted to create efficiencies around the use of ProSystem fx Document.	Document Champions Team
End-User Training	Staff is trained in the use of ProSystem fx Document, including how to add, search for, access and manipulate files. The course also covers how ProSystem fx Document integrates with other products in the ProSystem fx® Suite and with Microsoft® Office programs. This is based on the Best Practices Consulting course.	All Staff
Post-Implementation Consulting	This course covers making any needed adjustments to the firm's workflow that may be deemed necessary, based on the firm's experience with ProSystem fx Document. After reviewing your firm's feedback, the consultant will suggest ways to maximize use of ProSystem fx Document (such as storage of additional file types, for example).	Document Champions Team

For more information on CCH Consulting Services, call 800-PFX-9998 (800-739-9998) or visit CCHGroup.com/Training for a detailed list of training and consulting course opportunities.

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/ProSystem. 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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