

# CCH® ProSystem fx® Practice Management

## Welcome to CCH® ProSystem fx® Practice Management 2018.18.03

This bulletin provides important information about the 2018.18.03 release of Practice Management. Please review this information carefully. If you have any questions additional information is available on [CCH Support Online](#).

## New in the November 2018 Release

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### Technology Updates

#### Software Delivery Manager - New Security Verification

See "Getting Started with the November Release" below.

### Feature Enhancements

#### Employee Productivity Goals ( Administration > Firm > Firm Setup > General Information )

In Firm Setup on the General Information tab, new options for Employee Productivity Goals (formerly Employee Budgets) includes Calendar or Fiscal year. These options will drive the sorting of the periods (beginning to ending) for reporting only.

#### Employee Productivity Goals Setup ( Administration > Employees )

The Employee Budget Hours setup has been renamed to Employee Productivity Goals and reformatted for ease of use.

The employee list is a multi-select grid so that you may group employees when entering common goals.

- There is an option for multiple employees who all have the same goals or you may cycle through and add goals one employee at a time.
- You may enter billing realization percent goals for each period with the billable and nonbillable hours.
- When entering the goals there is an option to review goals entered for each employee for the entire year

#### Employee Productivity Goals Entry ( Time Entry > Activities )

The option for employees to enter their productivity goals from the Activities menu in Time Entry has been renamed to Enter Employee Productivity Goals. Billing realization percent goals are now entered per period with the billable and nonbillable hours.

#### My Productivity Goals ( Employee Dashboard )

A new tab has been added to the Employee Dashboard.

- Employees may select any year going back (or forward) 10 years to view their goals to actual with the variances.
- The first column displays the firm periods designated for employee goals.
- The following columns include Billable Hours, Billing Realization, NonBillable Hours, Total Hours and Productivity Ratio.

## **Edit Goals ( Administration > Employee Find and Change > Employee Productivity Goals )**

Three options have been enhanced for ease of use.

- Single Period replaces Budget Hours. This option provides an edit for a single period.
- Multi Period replaces Monthly Budget Hours. This option provides an edit for multiple periods.
- Copy Goals replaces Copy Budget Hours.

## **Employee Productivity Goals Reports ( Employee Standard Reports and Custom Reports )**

The Employee Budget Reports in standard reports and in custom library have been renamed to Employee Productivity Goals.

## **Roll Goals (Administration > Employees )**

Roll goals is a new option under Employee Productivity Goals. This option provides the ability to copy employee goals from one year to the next year. The employee list is a multi-select grid so that you may group employees to roll to the next year.

## **Report Writer:**

- “Project ID” has been added to the Client List available fields in the Report Writer. “Project ID” is the actual ID of the project record in the database that is referenced in the client table. This can be useful when a firm is importing time transactions using the program Load Time and the transaction includes a project.
- “PFX Tax Client” has been added to the Client List available fields in the Report Writer. This field has been designated as the same client linked in PFX Tax. The field is the tax record ID.

## **Issue Resolutions**

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The following section contains information about resolutions to known issues.

### **Administration**

Updating time from the Time\_In table (used for externally sourced time records) now correctly updates the WIP type (Regular, Sick, Vacation, CPE, Holiday or Personal). Additionally posting nonbillable time from the Time\_In table now pulls the appropriate nonbillable rate while project IDs are now validated prior to posting.

Employee Find and Change Budgets (now called Employee Find and Change Productivity Goals) now properly honors the user response of “No” after having responded “Yes” to a previous entry when editing multiple records.

### **Reports**

Invoice Number Status report no longer generates a message that no data was found if the invoice number range only includes invoices with a status of ‘Cancelled’.

Realization by Reason Code correctly utilizes the Invoice Post Date option when enabled.

### **Report Writer**

Error no longer generated selecting to access the right click menu when the mouse pointer is not on part of the navigation bar.

## **Getting Started with the November Release**

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### **How does 2-Step Verification apply to Practice Management?**

2-Step verification does not affect how you log in to Practice Management.

2-Step verification affects when you log into Software Delivery Manager. The 2-step verification increases security by sending users a code that authenticates identity and the device from which they are logging in adding a layer of protection more resilient than a password alone can provide. We recommend creating separate SSO profiles for any user that uses Software Delivery Manager or any of the other hosted applications listed above.

Minimum System Requirements have changed. [Click here for information.](#)

The following section contains helpful hints for success with new features.

- Workstation Setup:  
You must run workstation setup on ALL workstations if you are NOT on version 2017.17.02 or higher.
- Warning if you have custom indexes.  
Before updating, if your firm is currently on a version prior to 2014.14.01 AND has custom or non-standard indexes and/or triggers on client, employee, or project related tables that reference name or address fields, you must remove these indexes prior to applying a 2017 update. We recommend creating a backup copy of the database PRIOR to applying the update. Once the database has been updated, the custom or non-standard indexes can be added back.

## Firm Installation Instructions using the Software Delivery Manager

You will receive an email notifying you of an updated release. Prior to beginning installation, shut down all modules of Practice Management, including the Tray (PMTray.exe).

### Getting prepared for the software download

- Remote Workstations.  
You must release all time from remote workstations (connected or not connected to the network) before the firm's server is updated with this new version.
- Backups.  
Always verify that you have a current backup before installing updates.
- Permission Keys.  
You must have your user ID (ProSystem *fx* account number) and password before you can download the permission key. See the CCH ProSystem *fx* Practice Management Installation Guide, available from within the installation program, for more information.
- Internet Time Entry.  
If you purchase the Internet Time Entry add-on, remember that CCH ProSystem *fx* Practice Management and Internet Time Entry must be in sync. If you install the latest version of CCH ProSystem *fx* Practice Management, you must also install the same version of Internet Time Entry.

### Downloading the software

1. Open Software Delivery Manager. If you have not installed Software Delivery Manager, [click here for instructions.](#)
2. Select the CCH ProSystem *fx* Practice Management release you want to install.
3. Click **Start Download**.
4. After the download is complete, click **Open** to open the target folder.
5. Double-click the installation file.

6. You will be asked to either **RUN** or **SAVE** the update. We recommend saving the file to a temporary location rather than running it from the Web site. The temporary location must reside on a workstation that has Practice Management installed. You do not need to run this update from the server.
7. Once saved, double-click the **.exe** file to initiate the update. Choose the extraction location for the temporary setup files.
8. Run a workstation setup on ALL workstations: Applicable to this release? **Yes if you are NOT on version 2017.17.02 or higher.**
9. Update your CCH ProSystem *fx* Practice Management database to the new version by running **VersionDB.exe** (housed in the ...\\cpas\vpms\Updates folder in your application directory).
10. When the VersionDB window displays, select to update an existing Practice Management database.
11. Enter your SQL server name and SQL database name and click **Continue**.

**Note:** ALL modules of Practice Management should be shut down, including the Tray (PMTray.exe), prior to the installation of any update, whether or not workstation setup is required to ensure proper patching of the workstation

#### For New Installations

You will receive a welcome email that provides instructions on how to set up your CCH ProSystem *fx* SSO Default Administrator user profile. This setup includes your account number (also known as the Business ID number) and your password. More help can be obtained by calling Customer Support at 1-800-PFX-9998.

Make sure you have your account number and password before starting the installation. You will need this information to activate the permission key for software licensing.

Follow the instructions above to download Practice Management using the Software Delivery Manager.

1. After the download is complete, click **Open** to open the target folder.
2. Double-click the installation file.
3. Select **Installation Guide** and follow the instructions in the New to CCH ProSystem *fx* Practice Management section.