ProSystem *fx*®
Practice Management

CCH
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Release
Bulletin

Welcome to ProSystem *fx* Practice Management!

This bulletin provides important information relating to ProSystem *fx* Practice Management version 2012.12.03. Please review this bulletin carefully prior to installation, and if you have any questions, please call Customer Support at **1-800-PFX-9998**.

NEW IN THIS RELEASE

We have devoted this release to making enhancements and corrections to the following areas of ProSystem *fx* Practice Management:

NEW Enhancements
ProSystem *fx* Practice Management is now compatible with:

- Windows 8, Pro and Enterprise
- Windows Small Business Server 2011
- Windows Server 2012
- SQL 2012

SQL 2008 R2 Express is now available with any new installation of ProSystem *fx* Practice Management.

Microsoft Office 2010 OEM and Professional (64 bit) are now supported (except for Coolbar and Mail Monitor). Outlook (64 bit) will need to be open for Practice Management generated emails to be sent.

Project Notes is now available in the Client Project List type report in Report Writer.

Corrections
Project Management
The associated category or subcategory can now be removed from a project type.

Timers
The chosen project is now retained for edited or recorded timers when a client has more than one project of the same type with the same description and the employee has security for Project Based Time Entry.

Installing ProSystem *fx* Practice Management

The installation procedure you should follow depends on the type of installation you are performing. To access the correct instructions for your installation, do the following:

1. Insert the CD into the computer. If your CD drive is set for Auto Run, the installation wizard launches. If the wizard does not launch automatically, do the following:

    a. Select **Windows key + R**.

    b. Enter **x:\Setup.exe** (where x is the CD-ROM drive), and then click **OK.**

2. Select the document with the installation instructions for your situation.

- **For new installations** (not migrating from CPAPractice Manager), select **Installation Guide**, and then follow the instructions in the section *If You are NEW to ProSystem fx Practice Management*.

- **For upgrades from CPAPractice Manager**, select **Installation Guide**, then follow the instructions in the section *If you are Migrating from SQL/MSDE CPAPractice Manager*.

- **For updates from the 2007, 2008, 2009, 2010, 2011, and 2012 versions of the Basic, Office or Enterprise application,** select **Release Bulletin,** then follow the detailed installation instructions included in the document.

  Note: See the next section for additional information about installing updates to a previous version of Practice Management.

Special Notes about Updating from a Previous Version of ProSystem *fx* Practice Management

The following requirements should be kept in mind when updating from a previous version of Practice Management.

- **Workstation Setup**. You must run workstation setup on all workstations for this release.

- **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.

- **Database Updates**. You must run Versiondb.exe to update your Practice Management database. In addition, if you are updating CCH Coolbar, useVersiondb.exe to update the CCH Coolbar database used by Outlook. To do this, select **File > CCH Coolbar Data Creator > Update Active Practice Management Database (Default)**.

- **Permission Keys**. You must have your user ID (ProSystem *fx* account number) and password before you can download the permission key. See the *ProSystem fx Practice Management Installation Guide* or the release bulletin, both available from within the installation program, for more information.

- **Internet Time Entry**. If you purchase the Internet Time Entry add-on, remember that ProSystem *fx* Practice Management and Internet Time Entry must be in sync. If you install the latest version of ProSystem *fx* Practice Management, you must also install the same version of Internet Time Entry.

- **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.

Downloading a Patch

To download a patch, do the following:

1. To download, go to **support.cch.com.**

2. Type **Practice** in *Find a Product* and then select the **ProSystem *fx* Practice Management** link.

3. Select **Updates**.

4. Select to **Download** the self-extracting file. Enter your firm's **ID** and **Password**.

5. 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 website. The temporary location must reside on a workstation that has Practice Management installed. You do not need to run this update from the server.

6. Once saved, double-click the **.exe** file with the patch name to initiate the update.

7. **Run workstation setup on ALL workstations** for this release.

8. **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.

9. Now update your ProSystem *fx* Practice Management database to the new version. Run **VersionDB.exe** (from the **…\cpas\vpm\Updates** folder in your application directory). When the VersionDB window displays, select to update an existing Practice Management database. Enter your SQL server name and SQL database name, and click **Continue**.

10. If you are licensed for CCH Coolbar, you must now update the CCH Coolbar database to the new version. For the CCH Coolbar database update, open **Versiondb.exe** again and select **File**. Select **CCH Coolbar Data Creator.** Accept the existing defaults for your Practice Management database and click **Next**.

11. Now select **Update Active Practice Management Database (Default)** and click **Next**. Click **Process** to build the CCH Coolbar database and populate it with updated data. A message displays when the update completes.