

ProSystem fx[®] Suite

Portal - Release Bulletin

Release 2009-2

January 2010

Welcome to the ProSystem fx Suite Release

This bulletin provides important information about the 2009-2 release of the ProSystem fx Suite of products. Please review this bulletin carefully prior to installation. If you have any questions, please call Customer Support at 1-877-977-9PFX (9739) or contact support online at <http://support.cch.com/suite>.

The following website provides important information about this release: <http://support.cch.com/Suite/ReleaseNotes/>

By accessing this site you can view such helpful information as:

- ◆ Release Bulletins
- ◆ Known Issues
- ◆ Windows 7 Compatibility Information
- ◆ ProSystem fx Suite Support Calendar

NEW IN THIS RELEASE

To install release 2009-2 you must run Update Manager on all workstations, even if this is the first installation of the Smart Client on the workstation. This will update the workstation to the latest release.

The following updates are available in this release:

Data Migration

Prior to migrating your data from ProSystem fx or Global fx Tax, users should first complete the Pro Forma and Recall process for ProSystem fx Tax or complete the Roll Forward process for Global fx Tax.

Install

If you have any current year ProSystem fx Suite products installed on your system you will need to perform an installation to update your products to 2009-2. When any ProSystem fx Suite program is launched Update Manager will check and detect updates to the program and will prompt you to install. After a successful update of the products you will be required to install Installation Manager. The Installation Manager setup will be started when you attempt to launch any ProSystem fx Suite program. A prompt will appear asking to install Installation Manager. Select Yes and the Installation Manager setup will begin. When completed an Installation Manager icon will be present in the ProSystem fx Suite program group. At this time if Tax was previously installed you will be prompted to install the 2009 Tax product when you try to open a ProSystem fx program.

Email Notifications

Stand Alone Portal only: An additional EMAIL TO option has been added to the ADD FILE TO PORTAL BY PORTAL USER email notification event. The new EMAIL TO option is ANY FIRM USER ASSIGNED TO THIS PORTAL. If a file is added to a portal a firm user is assigned to the email notification will go to that/those firm users notifying them a new file has been added by the portal user.

Manage Users and Portals

There is now a checkbox that allows all Portals to be in view for the Manage User and Manage Portal screens. If this checkbox is selected, a warning will appear that states "Selecting this option could cause a long delay of several minutes before the application will respond." Select OK to continue or select Cancel.

Announcements

There is now a checkbox for the Announcements section that allows an announcement to be created for all Portals at once, even ones not in view in the grid. If this is selected a warning will appear that states "Selecting this option could cause a long delay of several minutes before the application will respond." Select OK to continue or select Cancel.

Performance

Additional performance improvement has been made for Security Groups.