

ProSystem *fx*® Portal

Release Bulletin
Release 2011-4.11
August 2012

Welcome to ProSystem *fx* Portal 2011-4.11

This bulletin provides important information about the 2011-4.11 release of ProSystem *fx* Portal. Please review this bulletin carefully. If you have any questions, please call Customer Support at 1-877-977-9739, Option 6. Additional information is available on CCH [Support Online](#).

NEW IN THIS RELEASE

The following features and enhancements are available in this release of ProSystem *fx* Document (SaaS).

Globalization and Localization

ProSystem *fx* Portal has been modified to support globalization standards and has been localized for US and Canada (English language only). Supported locales include English (United States), English (Canada), French (Canada). Previous versions only supported the English (United States) locale. ProSystem *fx* Portal can now operate on computers that use English (Canada) or French (Canada) regional settings.

Client Manager - Portal List View

A new view has been added to Client Manager for customers who license the version of Portal that integrates with ProSystem *fx* Document. You can now easily identify which clients have portals. From the Client Manager window, with Clients selected in the left navigation bar, select the Views option. Then under the My Views folder, select Client Portals. The view will display pertinent client information including a column to indicate if a portal has been created.

Two-Way Integration with ProSystem *fx* Engagement

Previous versions of Portal supported adding files to Portal from ProSystem *fx* Engagement. Now, files stored in ProSystem *fx* Portal can be copied to ProSystem *fx* Engagement. When a client sends you a file via Portal, you can use this feature to add the files to Engagement. To use this feature, right-click on a file in Portal and then select **Send to Engagement**. After entering your Engagement credentials, the Engagement Insert Workpaper Wizard displays so you can insert the file into the appropriate Engagement binder.

ADDITIONAL INFORMATION

You can learn more about ProSystem *fx* Portal by visiting our Web site [here](#), or by contacting your local sales representative.

Please visit [Support Online](#) to stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and frequently asked questions.