

ProSystem fx[®] Suite

Workstream - Release Bulletin

Release 2009-1

December 2009

Welcome to the ProSystem fx Suite Release

This bulletin provides important information about the 2009-1 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 2009 software is now available. 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
- Tax Product Enhancements
- Windows 7 Compatibility Information
- ProSystem fx Suite Support Calendar

NEW IN THIS RELEASE

To install release 2009-1 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 2009-1. 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.

ProSystem *fx* Workstream

- You can now use client attribute when defining views in Workstream.
- From a tax return, you can now open a route sheet even if the project is marked as complete.
- In the Workstream Status list items, the complete status is now denoted as required.