

ProSystem fx[®] Suite (SaaS)

Workstream - Release Bulletin

Release 2009-4.0

June 2010

Welcome to the ProSystem fx Suite (SaaS) Release

This bulletin provides important information about the 2009-4.0 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
- ◆ ProSystem fx Suite Support Calendar

Please visit the [Suite-SaaS Application Status](#) webpage to view in real time the current status of any of our SaaS applications. The Application Status webpage is updated every 15 minutes. Customers may visit at any time, including when support is closed.

NEW IN THIS RELEASE

ProSystem fx Workstream

File Holders

The File Holder option is now available for all projects. This option was only available if Working Out of the Drawer had been selected in previous releases. This change provides users the ability to view who currently has the client file.

Project Views

A Quick Search feature has been added as a new option to Views in Workstream to provide an easier method of creating a custom view.

Worksteps

The ability in creating custom Views in Workstream now includes the selection of the Next Open Workstep as a column for Workstep users. This provides users the ability to track firm workflows at a glance.