ProSystem *fx*® Workstream (SaaS)

Release 2009-5.0

November 2010

ProSystem *fx* Workstream (SaaS) Release Bulletin

This bulletin provides important information about the 2009-5.0 release of the ProSystem *fx* Workstream (SaaS). 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 on line 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

Dashboard Updates

You can now use popular Workstream features directly from the Dashboard without having to open Workstream first.

- Open a project
- Create a new project
- Start a quick search

Quick Search

Quick search has been enhanced to provide more flexibility and greater search capabilities.

- View types are introduced so you can determine what type of search to perform: Project, Form, or Workstep.

- Quick search now allows searching on Client Responsible Staff, so you can find all projects where a certain member of the firm is responsible for the client. For example, you can find all projects, where Jim Smith is the partner of the client.

<u>Additional Views</u>
Additional views are now available for each view type and more views were added for Project views.

- ◆ Project:
  - Project Status View
  - Project Completion Times
  - Projects on Hold
  - Projects Not Rolled Forward
  - Completed Projects

- ◆ Form:
  - Form Due Date
  - Forms for Extension
  - Extended Forms

- ◆ Workstep:
  - My Worksteps Not Started
  - My Worksteps in Progress
  - Worksteps that need Staffing
  - Worksteps by Planned Finish Date
  - Workstep Completion Times