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ProSystem *fx*® Workstream (SaaS)

Release 2010-3.5

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ProSystem *fx* Workstream (SaaS) Release Bulletin

This bulletin provides important information about the 2010-3.5 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

View System

The view system has been significantly enhanced to provide greater ease of use and improved performance. The new view system allows you to:

- Have multiple views open at the same time.
- Detach a view and freely reposition it, either on the same or a different monitor.
- Pin and unpin panes, providing the ability to show a pane all of the time or only when you hover over it.
- Sort across multiple pages.
- Filter based on additional criteria including "Does not equal." Dates can now be filtered by "Equal to," "Not equal to," and a range of dates utilizing "Is between."
- Select individual columns for each role and filter on them. Role filters will include a listing of each role in firm-defined order and the ability to select "Equal to" or "Is blank."
- Display individual columns for each milestone date and search and filter on them. The filters available for milestone dates include: Is blank, Today, First day of this month, First day of next month, First day of this week, First day of next week, First day of this quarter, First day of next quarter, First day of last quarter.
- Display individual columns for each custom field and search and filter on them. The filters available for custom fields are "Equal to" an available value for the custom field or "Is blank."

In addition to using the predefined views provided, it will be possible for you to personalize and save project, workstep, or forms views.

- Project views allow you to efficiently work with a list of projects. For each project, you will now have the ability to see the current workstep as a column. The "More Information" pane at the bottom of the project view will provide additional information on the currently highlighted project as well as display all worksteps for the project along with their current status. In addition, a new "Group-By" pane will make it easy to group and sub-group views (for example, by statutory due date by status).

- Workstep views allow you to effectively manage the individual steps which make up a project. This view will provide such information as what work is assigned to a given staff member or which worksteps need to be completed by a given date.
- Forms views allow you to view the status of your projects by form type by date (for example, show me all my 1120Ss due March 15th without a completion date).
- Once a new view has been created, you will be able to export it in a file format which can then be quickly imported by other Workstream users.

With the new view system you will be able to organize views in a way that helps you work most efficiently, including the ability to create folders and subfolders and store views within them.

Role and Workstep Assignments

The role and workstep assignment process has been streamlined. You can now assign worksteps to teams and quickly determine if you are assigned to a role or project directly or as the member of a team.

Data Migration

When migrating projects, you will now have the option to include or exclude project notes and memos from the migration.