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ProSystem *fx*® Workstream

Release 2011-3.5

May 2012

ProSystem *fx* Workstream Release Bulletin

This bulletin provides important information about the 2011-3.5 release of ProSystem *fx* Workstream. Please review this bulletin carefully prior to installation. If you have any questions, please call Account Services 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

General Enhancements

Enhancements provided with this release:

- **Project types and masters have been simplified** and the project creation process streamlined, providing time savings and an improved user experience.
- **Project status may now be updated immediately** from the ProSystem *fx* Practice (SaaS) Time Capture and Clock screens.
- **Marking a workstep "Complete"** via the ProSystem *fx* Practice (SaaS) Time Capture and Clock screens has been made more user-friendly.
- **Progress Bar indicators** have been added to select Master screens.
- The **process of linking Worksteps** to automatically set milestone dates has been improved.
- **All records within the project views may now be exported.** Exported records include those spanning multiple pages. This functionality provides quicker printable access to the information in your views.

Forms and Due Dates

Form and Due Date enhancements provided with this release include:

- **New forms were added and obsolete forms removed** from the CCH Library.*
- **Form due dates were updated** to reflect regulatory changes.*
- **Form Due Date calculation and recalculation methods have been improved.** The Report Year field was removed with dates now being calculated based on Planned Start Date or the Year Assigned to the First Project.**
- **Agency is now displayed** for ease in sorting and filtering forms.
- **Project and Workstep Planned Start and Finish Date calculation and update methods** have been improved.
- A **Statutory Due Date field** has been added to masters not utilizing CCH Forms.

**Note –All form and form due date updates were applied to the CCH Forms library. To reflect these changes, you will need to re-import forms and recalculate forms on projects.*

***Note – Quarterly and monthly forms previously classified in the CCH Library as annual forms have been revised. If you used any of these forms, please contact our Technical Support Team for form update assistance.*

Reports

Current Report enhancements include:

- New reports available when also using ProSystem *fx* Practice (SaaS) include:
  - **Intracompany Cost and Profit Report** allows you to track cost and profitability by office or project.
  - **Billing Worksheet by Project Report** allows you to review the WIP associated with specific projects.
- The **option for deleting report filters** has been made more intuitive.
- **Five firm level reports** are now available to all firms licensed for any ProSystem *fx* SaaS product.

Technical Corrections

Technical corrections made with this release include:

- Form Completion Dates and Milestone Dates now save and display correctly regardless of time zone.
- Workstep budget hours changes save and display correctly.
- Improvements to display options for closed and reopened projects.
- Update Multiple – Delivery Methods – Instructions field saves correctly; Forms – Mark Complete option now displays.
- Notifications assignment, generation, and delivery corrections.
- Changes to view filters and reset options; Worksteps that Need Staffing now displays correct information.
- Corrections to Project Assignment Pane on Dashboard including sorting, data displayed, double click and right click functionality.
- Role History saves correctly.
- Improvements to Roll Forward including Project ID settings, staff assignments, roll forward approval.
- Client Responsible Staff Labels now display correctly on route sheet.
- Performance of the Tax linking process has been improved.
- Update Status from a project view now shows correct fields and information.
- Add Forms to multiple projects – Add the form to the master and lock to push out to all associated projects.