CCH
a Wolters Kluwer business

# ProSystem *fx*® Workstream

Release 2011-4.11

August 2012

## ProSystem *fx Workstream* Release Bulletin

This bulletin provides important information about the 2011-4.11 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 webpage Suite - SaaS Application Status 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

Enhancements provided with this release:

- **ProSystem *fx* Engagement Integration** – Workstream now integrates with ProSystem *fx* Engagement. You can link your Engagement binder to a Workstream project from within the binder or your Local File Room. You can link one binder to one project, link one binder to multiple projects or link multiple binders to one project. With this linking, you can update the status of your Workstream Project and launch the Route Sheet directly from Engagement.

  Having this functionality directly available in Engagement saves time as you no longer have to use extra clicks to return to Workstream to access this functionality. If you store budget and actual information in Workstream, you will now have quick access to that information in Engagement via the Route Sheet.

- **ProSystem *fx* Practice (SaaS) - Time Keeper Security and Workstream Field Permissions** – In order to improve user experience, we've made improvements to the functionality of the Time Keeper Security group and its effect on ProSystem *fx* Workstream fields in Time Capture. Please be aware that Time Capture and Workstream are now honoring all Workstream permissions with regards to the Workstream fields for Project Status, Mark workstep complete, Estimated Hours to Complete, and As of Date. These changes ensure that Staff Assigned to worksteps can make appropriate changes to the workstep, while others with specific additional permissions can still make changes to the workstep if necessary.

Going forward, Workstream and Time Capture recognize that "Updating Status" does constitute editing the project, and "Mark Workstep Complete", "Enter Estimated Hours to Complete" constitute editing a workstep. As such, you need "Project – Edit" permissions to "Update Status" or "Workstep – Edit" to edit unassigned worksteps or worksteps assigned to others. If you do not need to update project status, mark worksteps complete, or enter estimated hours to complete, you do not need "Project – Edit" or "Workstep – Edit" permissions and will be able to enter their time to projects and worksteps. To ensure appropriate staff can edit these fields through Time Capture, please do a thorough review of your Security Permissions after this update. Pay particular attention to "Project - Edit", "Workstep - Edit", and "Manage Own Worksteps". If you have any questions, please call our Technical Support staff.

- **Dashboard** – **Notifications** – Notifications on the Dashboard now include additional identifying information. To make it easier to sort and organize your notifications, we've added Client Name, Client ID, Staff Name, and Staff ID as available fields on the Notifications Pane. Once you select these columns, your column settings persist. As you no longer have to open the notifications to see Client and Staff information, this allows you to gain efficiency and have better information and clarity into these notifications.

- **Workstep Views** - Views now sort by Workstep Name or ID across multiple pages. You can now sort across multiple pages, to see all worksteps assigned to a particular staff, see all worksteps with a particular planned start/finish date, which worksteps are completed or not. The ability to sort across pages creates efficiency, saving you the time of reviewing each page or exporting the view for additional sorting.

- **New Filter** - **Project Views** – You can now filter project views by Project Type. In the event that you do not have consistent Project Name/Project ID conventions in your firm, this new feature saves you time by grouping together similar projects, created under the same type. For example, if you wanted to see a list of ALL TAX projects, or ALL Consulting projects, the filter by Type makes that a quick and easy task.

<u>Feedback Feature</u>

- **ProSystem fx Help** - Files now offer a new feedback feature. You can send suggestions for supplementing or improving the help files directly to CCH, without ever leaving the help file. To open the feedback window, click the star button. This button is located at the bottom of each help screen, as shown below:


- To see a demonstration of the Help feedback feature, visit https://www.brainshark.com/cch/vu?pi=zHtzsdxHbz1So4z0&intk=854606739

*<u>Technical Corrections</u>*
Technical corrections made with this release include:

*<u>Views</u>*

- View now sort by Agency across the Form Due Date view
- Assigned field now displays when appropriate in the More Information Pane in Workstep views
- Corrected issue with removing locked worksteps from a workstep view

*<u>Roll Forward</u>*

- During roll forward, setting Replace the Beginning of Current Project's Name" now works per design
- During roll forward, Milestone Date fields reset and you see blank fields in the new project

*Masters and Creating Projects*

- When editing a Master, links between Milestone Dates and Worksteps now save appropriately
- Speed improvements when changing Questions in Master to Yes and subsequently locking the question
- Worksteps assigned in a Master via Client Responsible Staff Assignments now populate correctly in projects
- Improvements to prevent timeout during the project creation process
- Resolved issues related to items in Masters which were locked through a Type prior to version 2011-3.5

*Update Multiple*

- Fileholder assignment no longer changes when using Update Multiple – Individual
- Assigning roles via update multiple is now available
- Changing roll forward rules via update multiple is now available and working per design
- Updates to Office via update multiple now save per design

*Other*

- Text entered into Instructions field on route sheet now saves properly
- Linking a single related project to an existing project now performs as expected
- Route Sheet now shows First and Last Name for individual entity type clients
- Workstep Planned dates set up based upon Actual Finish date now populate correctly without the need to open and close the project
- Improvements to prevent error message "Order ID Duplicated" when adding, editing and saving worksteps
- Improvements to prevent error message "Notification Already sent to recipient" when notification has not been triggered
- Improvements to prevent incorrect error message "The added or subtracted value results in an un-representable DateTime"