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CCH

Release Bulletin

Release 2014.14.01
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ProSystem *fx*® Practice Management

Welcome to ProSystem *fx* Practice Management 2014.14.01

This bulletin provides important information about the 2014.14.01 release of ProSystem *fx* Practice Management. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 9. Additional information is available on CCH Support Online.

NEW IN THIS RELEASE

We have devoted this release to making enhancements and corrections to the ProSystem *fx* Practice Management Report Writer. Included in this release are 50 new report templates that can be saved and used as designed or may be customized for your firm. Included in the Report Writer are 106 new fields as well as a new report type for creating additional reports for Forecast Hours.

New Enhancements

Report Writer: Report Templates

50 new report templates have been added to the Report Writer. There are templates for every report type and we hope you find it much easier to start with a report template instead of starting from scratch using a report type. Report type functionality is still available.

To create a report using a report template:

- Click on the report template and click **Save As**.
- You will be prompted for your firm report name.
- Save your report name.
- The report is created as a firm report and is available immediately for any edits that you may want to make to customize the report for your firm.

Report Writer: Redesigned Navigation Bar

The Report Writer Navigation Bar has been re-organized.

- **My Reports List**

  At the top of the navigation bar you will find your firm reports in folders listed in blue and organized by the report type.

- **Available Report Templates**

  The new report template folders are listed under the folder "Available Report Templates" in black and organized by the report type.

Report Writer: Report Template Booklet

To review the new report templates use the hot link available at the bottom of the Navigation Bar for the **Report Template Booklet**. The booklet contains a snapshot of each report template, a list of key report writer elements for each report, an appendix with instructions and tips for creating and customizing reports, and an appendix that compares report templates with the same report type, side by side.

Report Writer: New Fields

106 additional fields have been added to the various report types to expand the Report Writer capabilities.

Report Writer: New Report Type

A new report type, Employee Forecast, has been added with 39 available fields to increase the reporting capabilities of the Forecast Hours feature that was introduced in the ProSystem *fx* Practice Management 2013.13.01 release.

Other Report Writer Enhancements

- Added a blank line between subtotaled rows when printing reports with the detail level at 'Show Detail' or at 'No Detail'
- On MTD/YTD report types, the YTD date range now displays the From and To dates
- New splash screen which gives a brief overview of "How To" use the report writer
- In customizing a report, the tab for selecting and editing columns now has a white background color to help notice at a glance when your column selections have gone over the available width and forced an additional row. The second row is highlighted in gray and stands out against the white background.
- Ability to change the font (type and size)
- Page break can now be selected without selecting to sub-total at all detail levels for fields selected to group
- When customizing a report, the 'Remaining space for next column' displays to assist with report customization

Other Enhancements

- Added a new security option for the Employee Time Analysis Report. This gives you the option to view the cost section of the report.

Getting Started with this Release

Before Updating

If your firm has custom or non-standard indexes on client, employee, or project related tables that reference name or address fields, you will need to remove these indexes prior to applying the 2014.14.01 update. Once the database has been updated, the custom or non-standard indexes can be added back. **The Practice Management Best Practice recommendation is to create a backup copy of the database PRIOR to applying the update.**

Report Writer

To take advantage of the new Report Writer report templates and fields, we recommend that you print the Report Template Booklet from the Report Writer Navigation Bar.

- Review the snapshot of all the new report templates
- Review the How To and Tips Appendix

Corrections

Report Writer

- Page breaks and subtotals are invoked when selected.
- Page orientation selected when customizing a report carries forward to the Run Report option. Additionally, page orientations saved from Run Report that differ from that saved in Customize Report are now honored.
- Invoice and check numbers fields no longer allow for a subtotal during report customization.
- Total Width on Row is now calculated correctly inclusive of space between columns and of added lead space.
- MTD YTD reports now display and calculate the correct YTD range.
- In the report header, the date ranges now always print on a separate line.
- Double underlines for grand totals are aligned correctly for reports where a column has been selected as an 'End Row' or the number of columns exceeds the maximum width for the row.
- Reports with realization, effective rate, or ratio fields now calculate correctly with use of the No Detail preference.
- Subtotals may be applied to non-sequential sort fields for all detail preferences as long as the field is selected for grouping.
- Use of the Between or Not Between filters for an Employee Banked Hours type report no longer generates an error.

- Data from non-custom Yes/No fields are now correctly presented as Yes/No instead of 1/0.
- YTD Total cost has been added to the MTD/YTD Employee Billing report type.

Sales Tax User Entry

- The Canadian Province Tax Rate can now be entered 3 places to the right of the decimal. All four places to the right of the decimal point now display in the Sales Tax tab's grid.

Project Management

- Unrolled projects with the same due date and type (but with unique descriptions) for the same client are no longer excluded from the "Show only projects not already rolled" option.

Administration/Time Exception Report

- When "Paid Time Off Employee Hours" is selected, and "Include Inactive Employees" is not selected, inactive employees no longer display in the PTO section of the report.
- When "Paid Time Off Employee Hours" is selected and "All Employees" is selected, all employees are included in the PTO section of the report, not just those who have exceeded their allowance.
- When more than one level is selected (for example, Office/Department/Employee Name rather than Office/Employee Name), the report now displays the correct page and/or column headers for the PTO section of the report.

Administration/Employees

- If you delete and replace an employee, the report queues are now properly updated.

Installing ProSystem *fx* Practice Management

The installation procedure you should follow depends on the type of installation you are performing. To access the correct instructions for your installation, do the following:

1. Insert the CD into the computer. If your CD drive is set for Auto Run, the installation wizard launches. If the wizard does not launch automatically, do the following:

    - Select **Windows key + R**.
    - Enter **x:\Setup.exe** (where x is the CD-ROM drive), and then click **OK**.

    All modules of Practice Management should be shut down, including the Tray (PMTray.exe) prior to the installation.

For new installations

Select **Installation Guide**, and then follow the instructions in the section **If You are NEW to ProSystem *fx* Practice Management**.

Verify your ProSystem *fx* Account Number and Password before starting the installation.

- Your ProSystem *fx* **Account Number** is the business ID number.
- Your **Password** can be obtained by calling Customer support at **1-800-PFX-9998**.

Make sure you have your account number and password BEFORE starting the installation. You will need this information to activate the permission key for software licensing.

For updates from the 2007, 2008, 2009, 2010, 2011, 2012, and 2013 versions of the Basic, Office or Enterprise application

Select **Release Bulletin**, then follow the detailed installation instructions included in the document.
See the next section for additional information about installing updates to a previous version of Practice Management.

Downloading a Patch

Please follow the instructions below to download a patch.

1. To download, go to **support.cch.com**.
2. Type **Practice** in *Find a Product* and then select the **ProSystem** *fx* **Practice Management** link.
3. Select **Updates**.
4. Select to **Download** the self-extracting file. Enter your firm's **ID** and **Password**.
5. You will be asked to either RUN or SAVE the update. We recommend saving the file to a temporary location rather than running it from the website. The temporary location must reside on a workstation that has Practice Management installed. You do not need to run this update from the server.
6. Once saved, double-click the **.exe** file to initiate the update choosing the extraction location for the temporary setup files.
7. **You must run workstation setup on ALL workstations for this release to update required tools**.
8. **ALL modules of Practice Management should be shut down, including the Tray (PMTray.exe)**, prior to the installation of any update whether or not workstation setup is required to ensure proper patching of the workstation.
9. Now update your ProSystem *fx* Practice Management database to the new version. Run **VersionDB.exe** (from the **...\cpas\vpm\Updates** folder in your application directory). When the VersionDB window displays, select to update an existing Practice Management database. Enter your SQL server name and SQL database name, and click **Continue**.
10. If you are licensed for CCH Coolbar, you must now update the CCH Coolbar database to the new version. For the CCH Coolbar database update, open **Versiondb.exe** again and select **File**. Select **CCH Coolbar Data Creator**. Accept the existing defaults for your Practice Management database and click **Next**. Note that CCH Coolbar is not available if you are running Windows 8.
11. Now select **Update Active Practice Management Database (Default)** and click **Next**. Click **Process** to build the CCH Coolbar database and populate it with updated data. A message displays when the update completes.

Special Notes about Updating from a Previous Version of ProSystem *fx* Practice Management

The following requirements should be kept in mind when updating from a previous version of Practice Management.

- **Workstation Setup**. You must run workstation setup on ALL workstations for this release to update required tools.
- **ALL modules of Practice Management should be shut down, including the Tray (PMTray.exe)**, prior to the installation of any update whether or not workstation setup is required to ensure proper patching of the workstation.
- **Database Updates**. You must run Versiondb.exe to update your Practice Management database. In addition, if you are updating CCH Coolbar, use Versiondb.exe to update the CCH Coolbar database used by Outlook. To do this, select **File > CCH Coolbar Data Creator > Update Active Practice Management Database (Default)**.
  Note that CCH Coolbar does not work on workstations with Windows 8.
- **Permission Keys**. You must have your user ID (ProSystem *fx* account number) and password before you can download the permission key. See the ProSystem *fx* Practice Management Installation Guide, available from within the installation program, for more information.
- **Internet Time Entry**. If you purchase the Internet Time Entry add-on, remember that ProSystem *fx* Practice Management and Internet Time Entry must be in sync. If you install the latest version of ProSystem *fx* Practice Management, you must also install the same version of Internet Time Entry.
- **Remote Workstations**. You must release all time from remote workstations (connected or not connected to the network) before the firm's server is updated with this new version.
- **Backups**. Always verify that you have a current backup before installing updates.