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Aug. 01, 2009

*From the August 2009 Review of [Engagement](#)
& Trial Balance Systems*

ProSystem

fx Engagement is one of the many product offerings in CCH's ProSystem *fx* Suite of products. Engagement can be used as a standalone product or integrated with other ProSystem *fx* products that share trial balance, tax, accounting and auditing research, tax research, document management, time and billing, practice management, and other information.

SET UP & IMPLEMENTATION:

ProSystem *fx* Engagement is a client/server installed application that can be installed on one machine that acts as both the server and the client, so smaller firms will not need to invest in a separate server. It's always a good idea to involve the firm's IT professional/expert to ensure installation is done properly.

Once the product is properly installed, it is fairly easy to set up and use. Someone within the firm will need to set up user rights and import information and data into the product. This should be a fairly straightforward task. The learning curve is quite short, but designating a product champion within your firm who can then teach everyone else how to use the product will likely produce the best results. CCH offers additional training courses aimed at helping your firm use Engagement more effectively as well as an annual Users' Conference to allow firms to share best practices.

INTEGRATION WITH OTHER TAX & ACCOUNTING PRODUCTS:

As previously mentioned, Engagement is just one of the many ProSystem *fx*

products. All of these products are designed to integrate with one another,

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packages. Simply save the trial balance data from the client's accounting package in an Excel or CSV file, and the information can be easily imported to the product's trial balance system.

In addition to sharing accounting data with other applications, Engagement integrates well with CCH's Accounting Research Manager (accounting and auditing research platform), IntelliConnect (tax and accounting research platform), Knowledge Tools (knowledge sharing platform) and Knowledge-Based Audit (audit methodology platform). Information from practice aids from other vendors can be attached to the Engagement binder, as long as those practice aids are converted to an MS Office or PDF format. These practice aids from other vendors should work well, but some of their intended functionality or collaboration may be lost.

INTEGRATION WITH OFFICE PRODUCTIVITY APPLICATIONS:

CCH has designed all of its products to integrate well with all Microsoft Office applications. They have spent a tremendous amount of time and effort to make sure their products work well with Microsoft Office, and it shows. My favorite feature is the MS Outlook plug-in. It allows users to easily email workpapers or any section of the engagement to anyone (client or firm member). This is a nice feature that saves a ton of time.

You can also attach any MS Office file to the Engagement binder. Once the file is attached to the binder, you simply click on the file and it opens in the appropriate application. Once you have completed any editing, you simply save it back to the Engagement binder.

Another example of CCH's commitment to MS Office integration is the fact that the trial balance system was built from Microsoft Word and Excel.

This allows firms to easily link their trial balance information and data to

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the next step.

Another nice feature is the Shared File Room feature that allows users in the field to easily collaborate on engagements. In the past, collaboration always sounded like a good idea, but the actual practice of collaboration was easier said than done. Now, ProSystem *fx* Engagement has a process that allows users in the field to easily collaborate on engagements without having to “sync” and “check in/out” the binder on a constant basis.

ProSystem *fx* Engagement has some nice roll-forward options that save time at the end of each engagement. It allows you to determine if you want to overwrite, delete, roll-forward or update items in the binder.

RELATIVE VALUE:

ProSystem *fx* Engagement is a very effective product that delivers what it promises. Product pricing is dependent on the specific modules selected, number of users and available discounts, but starts at around \$1,400. It integrates very well with other ProSystem *fx* products, and CCH continues to make improvements to the entire product line. With the improvements CCH has made to its audit and accounting practice aids over the last few years, there are great opportunities to leverage the integration of the practice aids and ProSystem *fx* Engagement.

2009 OVERALL RATING:

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