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publish information within an accounting firm. There are three versions of the product...

Brian Tankersley • Aug. 08, 2014



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“next generation” architecture, where a rich client application is used to access applications, all data files, and a common client database hosted by CCH. This version of the product has very tight integration with the other CCH Axxess applications, and uses a single unified login across all CCH Axxess applications.

Although the two applications are delivered in different environments, the user experience is similar enough that we will consolidate our reviews of CCH Axxess Document and ProSystem *fx* Document into a single review. When we interact with practitioners, their anecdotal reports lead us to believe that the dominant model for delivery is on-premises installation with ProSystem *fx* Document, followed by CCH Axxess Document in a distant second.

Document is built on the latest Microsoft database and server technologies, which provide users with powerful tools for storing, securing, searching, and retrieving large amounts of data. The user interface uses the tab-oriented “ribbon” design introduced with Microsoft Office 2007. Add-ins are available which support interacting with files stored in document from within recent versions of Microsoft Office (including Office 2013/Office 365) and Adobe Acrobat, although 64-bit versions of Office are not supported.

Document supports all of the traditional features of a DMS, including check-in, check-out, versioning, threaded discussions, and full search of the contents of documents. Files are indexed by being assigned a class, a subclass, a client, a document type, an engagement year, and a name. The records are assigned to archival retention groups at the time they are classified, and custom index fields are supported. Folders are generally created from a number of templates set up by the firm, and are assigned to new client engagements based on the type of engagement and entity type being served.

Files can be published and retrieved from CCH's client portal service, and client

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text indexing, search, and retrieval on all files stored in CCH Axcess Document.

ProSystem *fx* Document has added the Document Watcher Service to watch specific folders on a firm's network, index the data within the files, and store them in a specific location on the Document server. This application can be configured to watch as many as ten different folders for each office, and files in process can be monitored by viewing the Document Watcher Queue within the software.

Integration with other applications in the ProSystem *fx* suite has been enhanced, including Workstream, Practice, Portal, Knowledge Connect, as well as a new Client Dashboard. A new batch client linking utility has also been released which allows users to automatically print tax returns, working papers, and other documents from the legacy Foundation versions of Tax and Engagement. Users can attach documents to assignments using ProSystem *fx* Workstream, as well as use ProSystem *fx* Portal to exchange files securely with clients and third parties.

CCH does not have a demonstration environment available for reviewers and firms who would like to test a configured version of the application with sample data, so we were unable to have a traditional hands-on test of the CCH Axcess version of this application, although we have had numerous demonstrations of the product in the period since its launch, and base our ratings on those demonstrations and our interactions with CCH Axcess Document users at a number of industry events earlier in 2014.

Best Firm Fit

- Firms who use either the CCH professional application suites (CCH Axcess and CCH ProSystem *fx*), organizations who need the product's capabilities for integrating with information technology systems (active directory) and organizing documents by department or practice area.

- Organizations who want to rely on Wolters Kluwer for commercial data and

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- Powerful product which can be used in complex IT environments, and has tools for network administrators.
- Users can route documents, have threaded discussions, and create and respond to review notes from within the application.
- Structured indexing hierarchy, customizable fields, and full text search of files simplify the process of finding the information you want.

Potential Limitations

- Firms who work with applications from multiple publishers will find that the third party applications will not be as tightly integrated as the CCH applications.
- The ProSystem *fx* Suite does not have a single unified client database like CCH Axxess, so the integration works differently, and users may have to maintain some user and client setup data in more than one ProSystem *fx* application.

Summary and Pricing

CCH provided the following information on the pricing of Document: *“The base price for ProSystem fx Document is \$2780 . CCH Axxess Document pricing is tiered based on the number of users.”*

All other pricing information is available upon request.

2014 Overall Rating: 4.75 Stars

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