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ProSystem *fx* Document has been a part of the CCH product family for over two years now. It was originally developed within a CPA firm so, by its nature, it has been built as an accountant-centric application. The integration with the other CCH applications continues to evolve nicely, as well.

**Usability — 5 Stars**

ProSystem *fx* Document takes a unique approach to the user interface by focusing on the home page of the system as a personal portal to the document repository as well as links to other applications. The individual user has the ability to customize this home page to his or her personal preferences. The features available from the home page include recently accessed documents, document collaboration, client discussions, linked applications and check out documents. Unread messages can also be displayed, and appointments can be linked directly to Outlook.

Alternatively, the search page can be used as the user's home page. The search features are very comprehensive, allowing users to search by office, client or document-based metadata tags, which can be completely customized. The document hit list display can be customized by dragging, dropping or hiding columns. This includes the ability to organize the hit list by subgroups, such as client document class, etc. Annotation is handled from within the native application such as Adobe Acrobat, Word, Excel, etc.

**Integration — 5 Stars**

The home page previously described allows users to link directly to Outlook, ProSystem *fx* Engagement, ProSystem *fx* Tax and ProSystem *fx* Practice. As to be

expected, the integration with the ProSystem *fx* suite of applications is relatively

recycle bin is included, and security access can be established at a very granular level.

### Scanning — 5 Stars

Support for batch scanning is provided via barcoded cover sheets that contain the metadata used to index scanned documents. The ProSystem *fx* Scan module (formerly BOCDIP) has created a lot of interest in the tax and accounting marketplace as an innovative scanning solution. This application is designed to interpret the content of 1040 tax-related documents such as W-2s, 1099s, etc., and use that information to organize and bookmark the scanned images within a single PDF file that is created.

### Workflow Automation — 4.5 Stars

Two unique features that help facilitate workflow automation are Document Discussions and Client Discussions. Both of these features can be accessed from the home page of the system. The concept is to use these tools to attach appropriate documents to an e-mail message and track the communications thread. Beyond this, the primary tool for automating workflows will be through the direct integration with the XCM workflow software (www.xcmsolutions.com).

### Portal — 5 Stars

ProSystem *fx* Document provides a robust two-way portal function. The portal can be used by clients and internally as an alternative way to access documents. When external users upload documents and files through the portal, a built-in approval process helps screen the information that is being uploaded. Publishing a document or file to the portal is done by right-clicking "Publish" from the document hit list. A gold star symbol will display in the document hit list to put users on notice that the document has been published to the portal.

**Pricing/Value — 4.5 Stars**

compelling value proposition from an integration perspective. The company has announced plans to offer a web- hosted version of the system later this year, which should make the solution even more attractive to small firms that lack the required IT infrastructure.

**2007 Overall Rating: 5 Stars**