May. 29, 2008

From the June/July Review of Document Management Systems

It has been about three years now since CCH acquired the ProSystem *fx* Document software, and it's clear that the system is continuing to evolve as a core component of the ProSystem *fx* product strategy through its direct integration with the suite's Practice, Engagement and Tax products. The two most significant enhancements this year are the addition of an ASP (application
service provider) option and advanced e-mail management functionality.

Usability — 5 Stars
The Document homepage can be customized to the needs of individual users. The interface is designed using display panels that can be mixed and matched as desired. Examples of some of the panels include searching, recently accessed documents or clients, reports and more. Searching capabilities offer a variety of alternative data items that you can mix and match. The document hit list can be customized by arranging the displayed columns of data using drag-and-drop functions. A right-click menu provides direct access to numerous functions that can be performed on a document or file.

Scanning — 5 Stars
Two basic approaches to scanning are available with Document. One option is to generate a routing slip with bar coding by establishing the indexing metadata for the document. The routing slip is placed on top of the document to be scanned and will be automatically filed upon scanning. The other option is to scan directly into an import folder and then upload the document into the program. An additional

scanning tool is the ProSystem *fx* Scan module, which will perform document

within Document. The new E-mail management functionality emphasizes the value and importance of the role that MS Outlook plays in most accounting and tax firms. A Document panel is displayed along the left side of the Outlook navigation bar that displays a folder list of clients with subfolders by year that will take you directly to stored documents. You can also drag and drop e-mail messages and attachments from your Inbox to Document from the Outlook window. A particularly nice aspect of this feature is that you can configure it to automatically delete the message from Outlook once it is moved into Document. Early feedback from users is confirming that this is helping firms to significantly reduce the amount of storage individual users are requiring for their Outlook files.

Workflow Tools — 4 Stars
CCH recently partnered with XCM Solutions to utilize their workflow functionality, expanding on the workflow tools that CCH has already built into its products and modules. XCM was designed by a CPA firm to help transition the firm's workflows to a paperless model, so they know what's important in this application. The XCM system supports the setup of custom workflows and provides extended capabilities to track the status of engagements. You can learn more at www.xcmsolutions.com.
It appears, though, that CCH is embarking on a strategy to expand its workflow functionality within Document. You can now set up projects or engagements within Document or via integration with ProSystem *fx* Practice. Projects can be set up individually or in bulk, and you can assign a batch of files to a project to create a virtual binder. Projects can then be assigned personnel and tasks, and the status of the project can be tracked.

Client Portal — 5 Stars
The portal features have been enhanced to provide the option to select individual

files or a group of files to publish to the portal. You can set the status as

Technology — 5 Stars
ProSystem fx document is developed in the MS .NET framework and utilizes SQL database architecture. The newest release (version 3.7) is compatible with MS Server 2008. The ASP option provides a completely web-hosted solution.

Pricing/Overall Value — 4 Stars
Pricing for Document starts at $2,050 for the base server license and an additional $530 per user. The annual maintenance and support fee is 45 percent. The portal module is $1,100 for the in-house solution. The ASP option is $3,000 for the base license, plus $500 per user and $2,000 for the portal fee. This is an annual subscription fee model. CCH has been focusing heavily on gathering customer feedback on the Document solution and has been consistently increasing the functionality
of the solution over the past three years.

2008 Overall Rating — 4.5 Stars

Technology