Document Management Systems

ProSystem fx Document is designed as an accountant-centric application for midsize to larger firms. As the product development evolves, it will feature a much stronger integration with the vendor's tax and accounting software product line. ProSystem *fx* Document is a feature-rich application, and the extended feature set makes it a very viable solution for midsize to large firms.

Installation & Configuration — 4 Stars

ProSystem *fx* Document is designed as a scalable system that requires a fairly sophisticated client/server configuration. CCH can supply the detailed IT infrastructure requirements. You will need on-site assistance from the vendor to perform the initial setup and configuration. Frankly, I recommend you leverage the vendor's expertise for this task with all of the solutions. CCH will provide a comprehensive service that includes installation and configuration along with best practices consulting and training services in a weeklong on-site visit. A full web-hosted ASP option is planned for a September 2006 release, which will make the product a more practical solution for small firms as well as offer a new delivery method for any size firm who chooses to utilize the ASP model.

User Interface — 4 Stars

The interface is essentially designed as a knowledgebase portal. It consists of six separate panels of static information. Displayed information is user-definable, and the next release (due out in June 2006) will allow the user to customize the number and layout of the panels. One of the panels displays your recently accessed documents, which is very logical from a workflow perspective. The portal interface also provides the capability to "push out" documents for

direct client access and download. All of the search and results (hit list)

system, ProSystem *fx* Tax, MS Outlook, MS Office, ProSystem *fx* Practice, and CaseWare. In addition, a Document Print Driver is provided to generate document images and file them directly into ProSystem *fx* Document from any application.

Training & Support — 5 Stars

CCH provides a comprehensive offering of on-site and web-based services that includes technical support, best practices implementation advice, and end-user and administrator training.

Workflow & Document Tracking — 5 Stars

The system provides an extended set of features to help firms develop a true paperless workflow. Pieces from ProSystem *fx* Document will be available in ProSystem *fx* Practice with the June release, but direct integration with ProSystem *fx* Practice for comprehensive engagement management and due-date tracking should be available in August 2006. A "subscribe" feature is provided that allows you to keep track of a document as it is routed throughout the firm and see who is editing the document and/or checking it out. As well, an online discussion feature allows two or more people to collaborate on a document.

Security — 5 Stars

A complete user- and group-level security model is provided that allows you to grant and control permission to access, edit, check out documents, etc. A document/file history-tracking feature allows you to track the evolution of a document through multiple versions. A document retention feature includes the capability to establish retention rules based on document classes and sub-classes. A preview report can be generated prior to purging documents.

Pricing — 4 Stars

ProSystem *fx* Document's portal interface in the future to be the primary launch pad for all of the ProSystem *fx* applications that a firm has implemented.

2006 Overall Rating — 4.5 Stars

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