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The evolution of ProSystem *fx* Document continues to progress very nicely since CCH acquired it from the CPA firm of Habif, Arogeti & Wynne, LLP a few years ago. The biggest improvement this year is the addition of a web hosted option for firms that don't want to deal with the challenges of implementing and managing the server infrastructure required to deliver Document throughout the enterprise. So now you can choose the deployment model that best suits your firm's IT strategy.

USABILITY:
The Document interface is well designed to give you direct access to many different functions from a user-customizable home screen. The left side of the screen displays the command menus, including search tools, adding documents and files, reports, and direct access to up to six user-configurable panels. The configuration that was demonstrated for me displayed the following panels on the home page: a hit list of recently accessed files, a listing of discussion notes related to specific documents, a similar listing of discussion notes related to a particular client, user information, links to specific document data-bases, and a list of checked out files. All of this information was directly accessible from a single screen.

FILE ORGANIZATION/MANAGEMENT:
ProSystem *fx* Document uses a very simple file organization model. It starts with selecting the desired database you define, i.e., client files, firm files, etc. From there, the files are indexed according to the year and a set

of class and sub-class tags that you define. Keywords can be assigned as metadata

A feature that I find particularly helpful is for users to subscribe to be notified when there is activity with a particular file, such as publishing it to the portal.

INTEGRATION:

As you would expect, the strongest integration is with other ProSystem *fx* applications. Tax returns from ProSystem *fx* Tax can be published directly into Document, as well as ProSystem *fx* Engagement binders. Tax client files can be searched from within Document. Engagement Binders can be launched from Document, as well. Integration with ProSytem *fx* Practice allows you to link files to specific client projects setup in Practice. This includes a feature to display a list of files related to the project from within Practice. Additional integration includes storing links to information in the online Accounting

Research Manager.

For those of you who are using Microsoft Office 2007, you will find a Document tab on the ribbon to provide direct access to files stored in Document from within the Office applications. On the capture side, Document integrates with ProSystem *fx* Scan, a utility module that provides forms recognition and organization of scanned 1040 documents. An integrated portal module lets you publish and unpublish documents to the portal with one-click.

RELATIVE VALUE:

Pricing for ProSystem *fx* Document starts at $2,175 for the server and initial user license. Each additional user license is $565, and the portal module fee is $1,175. The ASP option starts at $3,180 for the initial user and $530 for each additional user.

If you are a "CCH Shop" then ProSystem *fx* Document should

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