



ProSystem fx® Engagement

Simplify your tax and/or audit engagement workflow.

ProSystem fx Engagement puts the power of paperless engagements in your hands. The software streamlines your processes at all stages of an engagement, with integrated workflow features for project tracking, reporting, review and sign-off, and archiving.

Efficient collaboration has never been easier! ProSystem fx Engagement improves teamwork, allowing you to share every document simultaneously. With Engagement's collaboration tools, you can:

- Allow multiple staff members to work on an engagement at once by checking out only the workpapers you need.
- Be confident you're looking at the most current version of every document by synchronizing work from any location.
- Email an entire binder with one click, or collaborate with customers using ProSystem fx® Portal.
- Use ProSystem fx® Knowledge Coach to plan and manage even your most complex audits.

Protect Data with Flexible Security Features

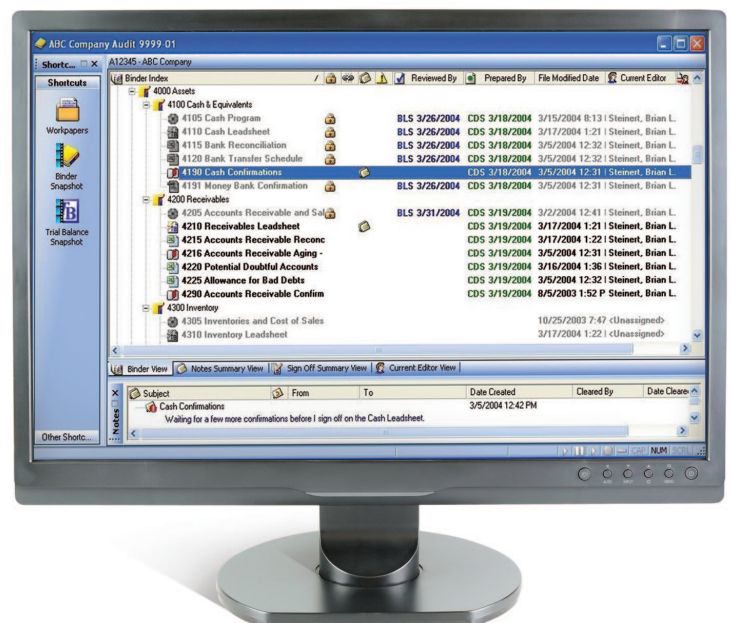
Engagement's secure environment lets you control who has access to your sensitive client information. Be confident that you're in compliance with regulations by using security features that allow you to:

- Ensure file integrity by securely managing every document from inside the program.
- Avoid unintentional or unauthorized changes by setting access rights for all of your staff groups.
- Obtain secure online sign-offs by preparer and reviewer, and lock documents after final review.
- Manage binder and workpaper completion dates to ensure compliance with 45- or 60-day requirements.

Automate Time-Consuming Tasks

Save time and money with a simplified workflow by automating your time-consuming tasks. With ProSystem fx Engagement, you can:

- Automate first-year engagements with customized binder templates.
- Roll forward an entire engagement with a single mouse click.
- Simplify tax return preparation by linking financial data between ProSystem fx® Tax products and Engagement, so trial balance updates are reflected automatically in the tax program.
- Easily finalize and archive the engagement, ensuring file security.



The integrated workflow features of ProSystem fx® Engagement streamline your processes and move you toward a true paperless office.

The Latest Innovations in Paperless Integration

You keep hearing about the benefits of a digital office. ProSystem fx Engagement delivers a paperless tax and/or audit engagement workflow, so your firm will enjoy the convenience of instantly accessible workpapers. Engagement lets you:

- Store and access all of your engagement binders in an intuitive Windows® Explorer-style file room.
- Save time by scanning documents directly into the correct engagement binder.
- Automatically create PDF files from any application, and seamlessly store them in paperless binders.
- Send files back and forth between ProSystem fx® Document, and share Engagement workpaper files with customers using ProSystem fx Portal.
- Reduce paper needs by planning and managing audit engagements within Engagement using ProSystem fx Knowledge Coach.



A Streamlined Workflow

Today's accounting profession is in a constant state of change, and firms are being asked to deliver more, work more efficiently, and stand up to a higher level of accountability than ever before. To meet these demands, ProSystem fx Engagement provides the highest level of security, maintains data integrity regardless of the amount of work moving through an engagement, and helps you comply with ever-changing industry regulations.

Set-Up — One-time staff set-up is simple, reducing the need for redundant data entry. The flexible administration module allows you to add teams to binders, saving you valuable time by eliminating the need to add individual staff members to each engagement. Security levels can be individualized for each staff member and set up at one time, making it easy to maintain data integrity throughout the process.

Compile and Organize Data — All of your workpapers are stored in Engagement's intuitive electronic filing cabinets and binder system, making them easy to find when you need them. You can import, export, email, and store PDF files from any application. Best of all, Engagement's robust trial balance system and other workpapers are built on Microsoft® Word and Excel, so you don't have to learn a new system.

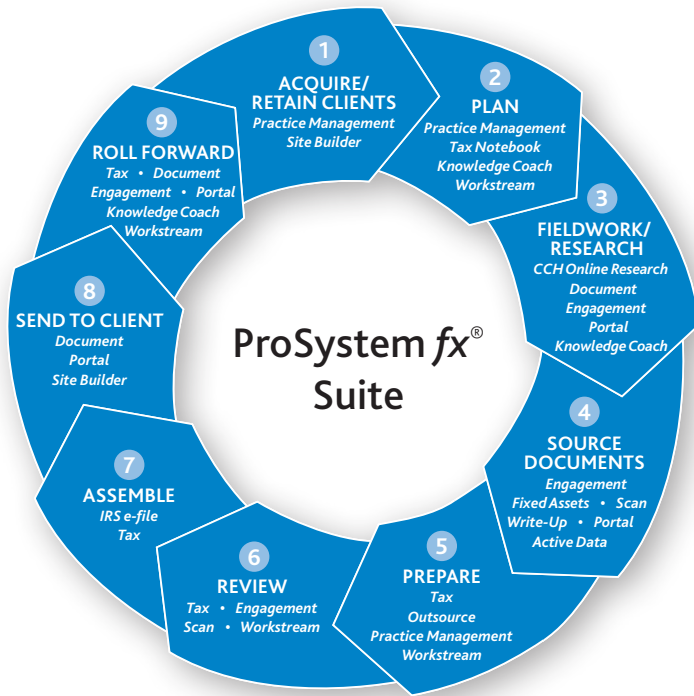
Collaborate and Review — Share information and synchronize binders from any location. ProSystem fx Engagement lets you manage the sign-off process electronically. You can monitor the flow of the engagement with a number of different snapshots and diagnostic screens. The Current Editor feature lets you know who is responsible for editing a document and ensures that only one person can make changes at a time.

Create Reports — Multiple financial statements can be created for any engagement. For example, client data can be formatted to provide information for tax returns, industry-specific statements, or a detailed financial analysis. Trial balance data can be linked to other applications using the powerful Dynalink functionality, making it easy to provide additional services, like tax preparation with ProSystem fx Tax.

Finalize Binders — Once the engagement is complete, you can finalize and archive with just a few clicks. Server space is maximized and calculations are locked down and secure, providing assurance that all of your work is safe and data integrity is maintained.

Archive Binders — ProSystem fx Engagement effectively stores dynamic data needed for your engagement process. To mitigate the risk of long-term storage, store the archived binder in ProSystem fx® Document. Assigned retention periods and indexing ensure that the binder does not get misplaced. Once the retention period is reached, document destruction can safely take place to ensure proper regulations compliance.

Roll Forward — Roll forward data from year to year, automatically populating financial statements and workpapers with current dates, account balances, and variances. Previously assigned staff will continue to be tracked in the new year, and pertinent financial statement data will also roll forward. Everything is ready for you to start work when the time comes.



From acquiring new clients to gathering source documents and generating the tax return or engagement results, the ProSystem fx Suite offers a multitude of solutions that keep your firm running smoothly.

Maximize Your ROI

ProSystem fx Engagement gives you the flexibility to continue using processes that work for you while giving you a powerful tool to replace processes that don't. ProSystem fx Engagement offers the most efficient workflow tools through an integrated suite that provides an end-to-end solution with competitive start-up and training costs.

Electronic workpaper management is a new concept for many accountants and requires proper planning and training, so be sure to take advantage of CCH's vast experience in guiding firms through the benefits of ProSystem fx Engagement. CCH consultants can help maximize your return on Engagement by sharing best practices and other information. For more information, visit CCHGroup.com/Training.

The CCH Training & Consulting Team will take your use of ProSystem fx products to a new level. Our team will assist you in incorporating Engagement into your daily workflow, along with working closely with you to show you best practices for using Engagement to build important relationships with your customers.

CCH Integration

ProSystem fx Engagement's robust trial balance system was built from the ground up on Microsoft® Word and Excel. To add convenience to the programs you're already familiar with, Engagement includes additional time-saving features, like import and export capabilities, dynamic linking, and enhanced copy-and-paste functionality. ProSystem fx Engagement takes work you've already done and interacts with other ProSystem fx products to streamline your workflow and eliminate costly duplication of effort, making your work more productive and profitable.

ProSystem fx Knowledge Coach — Fully integrated with Engagement, Knowledge Coach guides you through your entire audit from planning to completion, driving dramatic improvements in efficiency, accuracy and compliance.

ProSystem fx Tax — Simplify your tax preparation by linking information between Tax and Engagement, and securely store your tax return inside Engagement as a PDF.

ProSystem fx Document — Securely store archived engagement binders for assigned retention periods, and launch Engagement from within Document.

ProSystem fx Portal — Securely and privately collaborate with your customers and share any file over the Internet at any time, from any location.

ProSystem fx® Fixed Assets — Eliminate the hassle of tracking down fixed asset data by storing Fixed Assets reports directly inside Engagement binders.

ProSystem fx® Knowledge Tools — Incorporated within Engagement, Knowledge Tools provides expert audit guidance and practice aids that help your firm achieve optimal results.

ProSystem fx® Write-Up — Save time by exporting customized interim and annual statement data from Write-Up to Engagement, so you have vital summary information at your fingertips during consulting and audit engagements.

Accounting Research Manager® — Access this online research directly from Engagement for a current, complete, and objective resource on expertly written analytical accounting, auditing, governmental, and SEC information and primary source data.

IntelliConnect™ — This in-depth analysis tool can be launched directly from Engagement to save time in your research and minimize toggling between applications.

CCH@Hand™ — Copy research from CCH@Hand to Microsoft® Word documents in Engagement so it can be stored for future reference.

Compliance with Risk Assessment Standards

Complying with the new AICPA Risk Assessment Standards could pose a considerable challenge to your firm. The ProSystem fx Knowledge Tools and Knowledge Coach products, in conjunction with ProSystem fx Engagement, help you comply with the new standards accurately and efficiently. In addition, practice aids and tools support the new audit process and help your firm achieve optimal results. Knowledge Tools:

- Support the flow of information among the engagement team throughout the audit.
- Enable linkages and tailored procedures with flexible, easy-to-use tools.
- Ensure consistency and standardization across all published documents.

ProSystem fx Knowledge Tools ensure compliance effectiveness through a Knowledge-Based Audit™ (KBA). This updated audit methodology emphasizes understanding your client and his/her environment so you can accurately assess the risks of material misstatements. The KBA method focuses on information flow rather than document flow, enhancing communication between engagement team members and allowing for ongoing evaluation of procedures.

ProSystem fx Knowledge Coach extends the capabilities of Engagement and Knowledge Tools by providing a dynamic, workflow-driven environment to streamline your audit from planning through completion. It helps you comply with the latest standards, provides easy access to reference information, manages risks and audit steps, and flags areas that are incomplete or unnecessary. Knowledge Coach lets you concentrate on what's most important — the audit itself.

Our KBA methodology utilizes a set of integrated procedures, from pre-engagement all the way through evaluating, concluding and reporting. The results of one set of procedures become input for another. These linkages provide evidence you might use to modify the nature, timing, or extent of other planned audit procedures. With all of the information at your fingertips, you'll be able to make informed risk assessments using your own professional judgment and expertise.

Here are some of the available ProSystem fx Knowledge Tools titles:

- Knowledge-Based Audits™ of Commercial Entities
- Knowledge-Based Audits™ of Real Estate Entities
- Knowledge-Based Audits™ of Construction Companies and Contractors
- Knowledge-Based Audits™ of Not-for-Profit
- Knowledge-Based Audits™ of Governmental Entities
- Knowledge-Based Audits™ of Single Audits
- Knowledge-Based Audits™ of Employee Benefit Plans
- Knowledge-Based Audits™ of Financial Institutions
- Knowledge-Based Audits™ of Health Care Entities
- Knowledge-Based Compilations and Reviews

And more titles are on the way!

Please visit CCHGroup.com/KnowledgeTools for a complete, up-to-date list. Also visit CCHGroup.com/KnowledgeCoach for more information on this exciting product.

Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit CCHGroup.com/Training to learn more.

For more information on ProSystem fx® Engagement call **800-PFX-9998 (800-739-9998)** or visit CCHGroup.com

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/Engagement. If you plan to use multiple ProSystem fx Suite products within the same system, call **800-PFX-9998 (800-739-9998)** and ask to speak to your sales representative about whether or not your system availability is adequate.*

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