

CCH® ProSystem fx® Engagement & CCH® ProSystem fx® Knowledge Coach

Welcome to CCH® ProSystem fx® Engagement and CCH® ProSystem fx® Knowledge Coach v2017.3.3

This bulletin provides important information about the v2017.3.3 release of CCH ProSystem fx Engagement and CCH ProSystem fx Knowledge Coach. Please review this bulletin carefully. If you have any questions, additional information is available on [CCH Support Online](#).

Note: There are two guides that provide important information relating to the installation and deployment of Engagement and CCH ProSystem fx Knowledge Coach. These are the *Installation Guide* and the *Deployment Planning Guide* found in the Documents folder with the Install Media.

How to Deploy - For IT Administrators and Third-Party IT Providers Release - CCH ProSystem fx Engagement

1. Close CCH ProSystem fx Engagement before running the installation files.
2. Close all Microsoft® Office applications, such as Word, Excel® and Outlook®.
3. Download the installation file using CCH Software Delivery Manager.
4. Install a SQL instance.

Note: SQL 2016 installations should be run locally rather than from the network.

5. Install CCH ProSystem fx Engagement.

Note: You can confirm the Workpaper Management, Trial Balance, TGUW and Knowledge Coach version numbers by reviewing the following registry key:

<computer>\HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\ProFxENGAGEMENT30\Common

For further information see "[How do I install CCH ProSystem fx Engagement?](#)" on CCH Support Online.

New in this 2017.3.3 Release - CCH ProSystem fx Engagement

2018 Tax Grouping List Template Update

The following 2018 tax grouping list templates (.AZG files) were updated as detailed in the Knowledge Base article [here](#).

- 2018 C-Corp - ProSystem fx Tax
- 2018 S-Corp - ProSystem fx Tax
- 2018 Exempt Org - ProSystem fx Tax

- 2018 S-Corp - Lacerte
- 2018 S-Corp - UltraTax

Important: The updated templates are applicable only when creating 2018 tax grouping lists by importing from the Account Groupings - Grouping List Options dialog. The update has no effect on 2018 tax grouping lists created by running the Tax Grouping Update Wizard.

Provided in 2017.3.1 Release - CCH ProSystem fx Knowledge Coach

Knowledge Coach Title Install Utility

Available in the WM Utilities folder, this utility allows users to download, install, or release multiple titles at the same time pending their user rights to do so. This utility can also be used by support team to assist users in download/install, this is mostly for new customers.

Program Step Library and/or Risk Pane No Longer Appears Blank

The issue where the program step library and/or the risk pane appears blank for Knowledge Coach workpapers in Microsoft® Office 2016 is resolved by the new Microsoft® optimization option automatically being set to compatible mode when opening a Knowledge Coach Word document.

Provided in a Prior 2017 Release - CCH ProSystem fx Engagement

2018 Tax Grouping Update

The 2018 Tax Grouping Update includes the changes as detailed in <https://support.cch.com/kb/solution/000094697>

CCH® ProSystem fx® Tax and CCH Access™ Tax

- The Tax Grouping Update Wizard will update tax grouping lists to 2018 tax codes.
- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Lacerte®

- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

GoSystem® Tax

- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

UltraTax CS®

- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Updated Delete Binders Utility

Filters applied in the Delete Binders Utility are updated such that all binders selected for deletion in the list of filtered binders delete as expected. You can now hold down either the **SHIFT** or **CTRL** key to select multiple binders in the list.

Using Engagement Organizer

A shortcut to a new feature, Engagement Organizer, is provided in the Engagement Binder window. CCH Client Access™ Portal is required for Engagement Organizer. The organizer provides an automated way to request and receive documents from clients before beginning an engagement. It will allow for easier tracking of the documents received and outstanding as well as provide notifications when changes are made or when outstanding requests are approaching their due date.

- Important: Engagement 2017.2.5 or higher must be installed to work with the Engagement Organizer feature.

Using CCH® Audit Accelerator

A shortcut to a new cloud-based application, CCH Audit Accelerator, is provided in the *Engagement Binder* window. CCH Audit Accelerator automates the extraction of data from the client's source accounting package and instantly transforms the data into dynamic reports and workpapers that can support your audit procedures. It also provides the ability to generate an Excel® report that can be used for importing the client's chart of accounts with balances into an Engagement trial balance via Paste TB Import.

Viewing the Contents of and Adding Workpapers to a Central File Room (CFR) Binder

A central file room binder to which you are assigned can now be opened in the CFR pane of the *File Room* window to view the tabs, workpapers, and workpaper notes in the binder. In addition, workpapers from a file can be added directly to the binder without synchronizing it to your local file room.

Reviewing and working with a central file room binder has the following limitations as compared to reviewing and working with a local file room binder:

- The tabs, workpapers and notes cannot be opened or edited.
- Only the details of workpaper notes can be reviewed. Details for tab notes are not available for review.
- When adding workpapers to the binder, the original source workpaper cannot automatically be deleted.
- Workpapers already in the binder cannot be overwritten when adding a workpaper.

Copying Journal Entry Lines from Excel® to the Journal Entry Detail Dialog

You can quickly setup multiple detail lines for a journal entry by copying rows of data from an Excel® spreadsheet that includes Account #, Description, and Debit and Credit columns. After copying the rows from Excel®, they can be pasted into the detail lines grid of the *Journal Entry Detail* dialog. The *Description* column is required in the Excel® spreadsheet, but it will be ignored and thus, can be blank in the spreadsheet if desired.

Improvements to TB Reports Created in Engagement Release 7.5 or Later

Trial balance and journal entry reports created in Engagement release v7.5 or later now refresh more quickly. In addition, the following edits to reports are retained when the report refreshes:

- Microsoft® Excel® Comments (and other markups within editable areas of the report).
- Formats (i.e. Font and highlighting to even the protected areas of the report).
- Zoom setting.
- Freeze panes setting.
- Column width adjustments (including 50 editable columns to the right of the report).
- Row height adjustments (with some exceptions).
- Auto Calculate setting to avoid blank headers/blank variance columns.
- State of expand/collapse for journal entry detail rows.
- Hiding journal entry detail that nets to zero when the setting to hide zero balance accounts is selected.
- In Excel®, **File > Print > Page Setup > Sheets > Rows to repeat at top** option setting is retained so that header information prints on all pages of the report.

All Trial Balances are Now in Excel®.xlsx File Format

All new trial balances (fund, standard, consolidated, and write up) are now in the Excel®.xlsx file format to allow for up to 100,000 accounts to be set up in any trial balance. Trial balances in new binders created from the *New Binder Wizard* or by rolling forward or copying a binder will be in the Excel®.xlsx file format. However, trial balances in existing binders will not be converted to the .xlsx format.

Using Passwords that Meet Firm Rules

When the option to define password rules is selected in *Firm Options*, staff members will be prompted to change their password in the following circumstances:

- An administrator has assigned a temporary password in Staff Properties of the Administrator application.
- The staff member's current password does not meet one or more of the password rules.
- The staff member's password has expired.

See the [Password Rules in Firm Options](#) below for more information about turning on a Firm Option to require staff to have passwords that meet certain rules.

Provided in a Prior 2017 Release - CCH ProSystem fx Engagement Administrator

Password Rules in Firm Options

Administrators can now optionally define rules for staff login passwords. A check box option in **Tools > Firm Options** can be selected to require staff member login passwords to meet certain rules. A new dialog is provided to define the rules.

Rules: In addition to being able to select from the rules listed below, passwords are case sensitive.

- At least ### characters (1 to 128)
- At least 1 upper case character (A to Z)
- At least 1 lower case character (a to z)
- At least 1 digit (0 to 9)
- At least 1 special character (space is special)
- Must not contain staff member login name
- No historical reuse for last ### passwords (1 to 100)
- Require staff to change their password every ### days (1 to 365)

If the password rules option is turned on in *Firm Options* and an administrator assigns a password to a staff member in Staff Properties, the staff member will be prompted when he/she logs into the Engagement application while connected to an office server to change the temporary password to one that meets the rules. The staff member will also be prompted to change their current password if at any time it has either expired or does not meet one or more of the selected rules.

Please refer to the Engagement Knowledge Base article, [Staff Password Rules Best Practices](#), prior to turning on and setting up firm password rules.

Updated Admin Views Utility

The Admin Views Utility has been updated to improve the performance for loading data in the grid for the selected view. For views where a large number of records will be retrieved from the database, such as some of the binder views, a *Filter Conditions* dialog displays to enter one or more conditions to reduce the data to retrieve from the database.

For some of the views, you can drill down by clicking the **plus (+)** to expand a row in the grid to view to more detailed information. For example, with the Binder Properties view, you can drill down to review Tab, Workpaper, Team and Staff binder-specific details.

A new *Staff Password Information* view is provided for determining when a staff member's password will expire (assuming your firm has selected the rule to require staff to change their password at regular intervals).

Provided in a Prior 2017 Release - CCH ProSystem fx Knowledge Coach

Install 2018 KBA Commercial Entities for Knowledge Coach

Install and use 2018 KBA Commercial Entities on Engagement v2017. You can continue working in the title and you will not need to reinstall once you upgrade to Engagement v2018.

Get the Latest Correspondence, Report, Resource, or Microsoft® Excel® Knowledge Coach Workpapers Directly from the Web

Beginning with the KBA Commercial 2018 title, these workpapers will be created and inserted directly into the binder using the CCH® Accounting Research Manager® (ARM) content. There will be no changes to the way that you insert, update, or use these files. However, when applicable standard updates or industry changes occur after the title has been released, you can get the latest version of these files without having to install a Knowledge Coach Content Update or getting them from Accounting Research Manager (ARM). Instead, you can get the updated version delivered directly into your binders by using the **Tools > Repair Knowledge Coach Workpaper** option or by inserting a new version of the workpaper through the *New Knowledge Coach Workpaper* dialog. An internet connection will be required when you insert the file into your binder, update content, or open the workpaper for the first time.

View CCH Program Steps that can be Addressed Using TeamMate Analytics

A new TeamMate Analytics icon will display in the program step library of the AUD-80X workpapers to show which program steps can be accomplished using this data analytics tool. Expand the program step in the library to show all the sub-steps and then, hover over the icon to see the applicable TeamMate Analytics test name.

Note: The icons will display on main steps as a notification that sub-steps have applicable TeamMate Analytics tests. In these instances, there will not be hover text in the main step. The TeamMate test name will also display at the end of the program step in the workpaper so that you can review the test name without having the program step library.

Repair Workpaper Improvements

The Repair Knowledge Coach workpapers feature is no longer available for Knowledge Coach Microsoft® Excel® workpapers because this feature is only applicable for Knowledge Coach Microsoft® Word workpapers that contain Knowledge Coach tables.

Synchronization Improvements

Synchronization improvements for Knowledge Coach workpapers are included to prevent missing sign-offs after binder synchronization.

Search for Titles and Workpapers in New Knowledge Coach Workpaper Dialog

Find the workpaper you're looking for more quickly by using the new search field to search for key terms. Workpapers containing the searched keyword in either the workpaper name or the description will be displayed for your selection.

The *New Knowledge Coach Workpaper* Dialog has also been improved to show the available titles in a separate section in descending order from newest to oldest in alphabetical order. Other improvements include:

- The last title used in the selected binder will be automatically selected in the dialog as the default.
- Only released titles will be displayed unless the user has the Admin right under **Staff Group Properties > Content Tab** to Insert Knowledge Coach workpapers from unreleased titles.

See the Knowledge Coach Title Year and Industry Title Name in your Binder

Two new columns have been added to the views inside your binder so that you can see the *KC Title Year* and *KC Title Name* for all your Knowledge Coach workpapers with a single glance without having to check the properties or open the workpapers. Look for these new columns in each of the view tabs available for your binder.

Reviewing Knowledge Coach Workpapers in Shared File Room Binders

Binders with Knowledge Coach workpapers can now be opened when logged in to a shared file room. The Knowledge Coach workpapers cannot be edited, but can be viewed, signed off on, and workpaper notes can be attached to them while working in a shared file room binder. All non-Knowledge Coach workpapers can be worked on in the shared file room with no restrictions.

Binder Properties Provides More Information

The information tab of binder properties will now show the Knowledge Coach titles required to open the selected binder.

Issues Resolved in a Prior 2017 Release

TB Report refresh stalls at 62%

When the latest Microsoft® Office updates for either 2013 or 2016 versions of Office are installed, TB reports will no longer stall at 62% when refreshing.

Reviewer Sign Off Message

A message will no longer display when the current editor opens a Word or Excel® workpaper that is signed off as reviewed. A more user-friendly warning mechanism will be provided with the summer 2018 release.

Missing Functions in Add-in Ribbon and Right-Click Menu in Excel®

The issues introduced by Microsoft® with Office 365™ v1707(Build 8326.2107), which includes the desktop version of Microsoft® Office 2016, that was causing the CCH® ProSystem fx® Engagement menu commands on the ribbon and right-click menu to be missing in Microsoft® Excel® workpapers will no longer occur. See [Knowledge Base article, Microsoft® Office 365™ September update results in multiple addin issues in CCH® ProSystem fx® Engagement or Workpaper Manager](#) for further information.

Resolved Knowledge Base Article 68882

The error "Unable to open TBState file for read" when the PfxEngagement.exe process is launched using the short file name, will no longer occur during launch of Microsoft® Excel®.

Issues identified in a previous release of Engagement have been resolved to enhance your workflow, including:

- The option to send an Engagement workpaper to a mail recipient now works with Microsoft® Office 64-bit editions.
- The Consolidated balance correctly includes EJE's after re consolidating with one or more prior periods.
- During Paste TB Import, if you select to round the balance, you will be notified if you have not selected a rounding account.
- Detail trial balance reports are able to be created even when any TB column abbreviation is over 16 characters.
- The binder retention date is correctly calculated, and binders can be finalized without error when the Binder Properties Date of Report and/or Report Release Date is a leap year day (02/29/####).
- A stronger password is being used for the SQL Admin (sa) account which will prevent SQL installation failures where complex passwords are required.

Technologies No Longer Supported

As communicated last year, the following technologies are no longer supported:

- Microsoft® Windows Server® 2008 and 2008 R2
- Microsoft® Office 2010
- Adobe® Reader X and Adobe® Acrobat® X

Technologies Supported

The following new technologies are now supported:

- Microsoft® Windows Server® 2016
- Microsoft® SQL Server® 2016 (available in 64-bit only)
- QuickBooks® 2017
- Citrix® XenApp® v7.12
- Adobe® Reader 2017 and Adobe® Acrobat® 2017

At Wolters Kluwer, we want to ensure that we are staying current with the latest technologies. Therefore, going forward, we will support only the current and one prior version of both third-party technologies and our CCH applications. The latest system requirements can be found on the Engagement Support site [CCH Support Online](#).

Important Notes

Engagement and Knowledge Coach Versions Supported in 2017

Beginning with this release, we will no longer support Engagement versions prior to v7.2.

In order to ensure the highest quality support and product experience, CCH will only offer support for the current version and one previous year's version of the software. For this purpose, "support" is defined in two parts: Technical Compatibility and Customer Support.

SQL Admin Login (sa) Now Supports Complex Password Policies

Previously the SQL admin login failed to use a complex password. This resulted in SQL installation failures when firm level security policies were not properly met. The new password has better support for more complex requirements. If you have applications which require the SA account login, it will be critical that you plan to update to the new password as part of the upgrade process. Failure to do this will result in login problems for those applications. Please refer to the Engagement Knowledge Base article [66404](#) for further information about the SQL Admin login changes.

Tax Grouping Update Wizard

You can no longer run the Tax Grouping Update Utility from a machine with only the Administrator module installed. You must run the Tax Grouping Update Wizard from a machine that has either the Workpaper Management module installed, Administrator and Workpaper Management modules installed, or Terminal Services Client installed.

CCH® ProSystem fx® Practice Advantage

We removed the Practice Advantage integration with this release.

Installation Information

Please refer to the *Installation Guide* and the *Deployment Planning Guide* for important information relating to the installation and deployment of Engagement. These guides may be found in the Documents folder with the Install Media.

.NET 4.6.1 Full Required for All Installation Options

The installation requires .NET 4.6.1 Full for WM, TSClient, TSDatabase, Admin, and AdminWS installations.

Service Packs

It is strongly recommended that the latest service packs for operating systems and other software are installed in order for Engagement to run optimally. Please refer to the *Installation Guide* for more details on the recommended and required versions.

Upgrade Operating System or Microsoft® Office

If applicable, complete operating system or Microsoft® Office upgrades prior to installing the latest version of Engagement.

Refer to the *Installation Guide* for detailed information regarding the installation and configuration of Engagement.

Upgrade Engagement

Upgrades to Engagement v2017.2.5 are supported from Engagement v7.2 and v7.5. It is required that all Engagement office servers and workstations be upgraded. If you are currently using a version prior to 7.2 and require assistance with upgrading, please contact Technical Support.

When upgrading the Engagement Administrator module from v7.2 or higher, you will be required to reset your name and password after the installation of v2017.2.5, if you have changed the logon account for the PFXSYNPFT Service to allow workpapers to reside on a remote server. Failure to do so will result in failed synchronizations.

During a new installation of Engagement Administrator module, the creation of bin databases for storing binder information will default to the installation directory (x:\Pfx Engagement\Admin\Data). If you prefer the bin to be created in a location other than the Admin installation directory, you must change the bin directory path on the *Choose Bin Database Path* dialog during the installation. Please refer to the *Installation Guide* for additional information.

For specific user rights requirements, please refer to Appendix E in the *User Guide*.

Ports

Engagement transfers data over the following ports:

- SQL Server (PROFXENGAGEMENT) - TCP port 2029; UDP port 1434
- Pfx.Engagement.SocketService - TCP port 4531
- PFXSYNPFTService - TCP port 6735
- PFXEngDesktopService - TCP port 6736
- PfxConfigUtility - UDP port 6737
- P2EWinService - TCP ports 943 and 4530
- SharedFileRoom - TCP port 445

These ports are configured on the server and workstations during installation. However, if you are connecting over a VPN, through a firewall, or another device such as a router, you will need to ensure that these ports are opened for the program to work correctly.

Mass Deployment

Engagement allows for mass deployment/installation by way of pushing the install to computers. Installs using an MSI file vary depending on what deployment tool is used. For instructions on how to complete the installation with an MSI package using Microsoft® Active Directory®, please refer to the *Installation Guide*. If you are using a deployment tool other than Microsoft® Active Directory®, please consult your deployment application documentation for further instructions on how to push the install with an MSI package.

Minimum Requirements

The minimum system memory for Engagement Administrator or Workpaper Management modules on a 32-bit computer is 2 GB. In addition, Engagement requires MDAC 2.8 SP1 or higher on each workstation. Please see the *Installation Guide* for additional information.

Logging In After Update

After the upgrade from a previous version, there is a VSTO clean-up process that will add time to the initial log in to Engagement. It may be helpful to notify end users of the additional initial login time.

SQL Express/SQL Upgrade

SQL Server® Express is a free edition of SQL Server® that may be used in conjunction with Engagement. If firms choose to purchase Microsoft® SQL Server® 2012, Microsoft® SQL Server® 2014 or Microsoft® SQL Server® 2016, there may be additional licensing costs associated. Please refer to [Microsoft® SQL Server® versions](#) for detailed licensing options.

Important: Engagement v2017.2.5 supports Microsoft® SQL Server® Express, Standard and Enterprise editions in versions 2012, 2014 and 2016, as its database engine.

Operating Systems Not Supported

Engagement should not be installed on the following:

- Microsoft® Small Business Server (for more information, see <http://support.cch.com/kb/solution.aspx/sw34431>)
- A Domain Controller Server (for more information, see <http://support.cch.com/kb/solution.aspx/sw3787>)
- An Exchange Server
- Linux, as it is supported for workpaper storage only.

Conversion of Binders, Templates, Packages and Trial Balance Databases

Binders

When upgrading, the Engagement binder databases will be converted during the installation process.

Important: Prior to installation, ensure there is a successful backup of the Engagement databases, workpapers, and templates. For additional information, please refer to Appendix F: Database Backup and Restore in the *User Guide*.

Templates and Binder Packages

All binder templates must be converted from the Workpaper Management module after installing Engagement v2017.2.5. Binder templates created in v4.0 or later may be converted directly to v2017.2.5. Binder template conversion must be run on a machine with a local installation of Engagement Workpaper Management. Users in a Citrix® or Terminal Services environment should convert the binder templates in a non-Citrix® or non-Terminal Services environment. The binder templates can then be copied to the Citrix® or Terminal Server.

Trial balance templates created in Engagement v4.0 or higher can be converted via a process provided on the File menu of the Engagement File Room.

Binder packages created in Engagement v4.0 or higher will automatically be converted to v2017.2.5 when received into a local file room. Binders archived in v4.0 or higher may be unarchived with v2017.2.5. Binder backups created in Engagement v4.0 or higher can be restored into v2017.2.5.

Trial Balances

Trial balances created in Engagement v5.7 or earlier will be automatically converted when synchronizing the binder or receiving the binder package.

Database Backup & Restore

Regular nightly backups of Engagement databases, workpapers, and templates will enable you to restore them in the event of a hardware failure or other disaster. In addition, you can choose to incorporate differential backups as part of your backup strategy. If you require assistance in setting up a scheduled nightly backup or ensuring your current backup is capturing all necessary files, please visit <http://support.cch.com/kb/solution.aspx/sw33890> or contact Technical Support.

During the installation of the Engagement Administrator module v2017.2.5, the Database Backup & Restore Utility will automatically be installed to the x:\Pfx Engagement\Admin\Utilities\Backup Restore directory.

Important: If you are currently using third-party backup software to back up the Engagement databases, you will not be able to restore a single binder to the central file room. The CCH® ProSystem fx® Engagement Database Backup & Restore Utility allows the restoration of a single binder or an entire central file room.

For additional information about the Database Backup & Restore Utility or instructions on setting up a scheduled task for the nightly backup, please refer to Appendix F: Database Backup & Restore in the *User Guide*.

Other Information

Microsoft® Windows® 7 and Windows® 8.1

When running the CCH® ProSystem fx® Engagement Configuration Utility in a Windows® 7 or Windows® 8.1 environment with User Account Control (UAC) enabled, the Interactive Services Detection service must be running. The recommended best practice is to configure the Interactive Services Detection service to start automatically.

Virtualization included in Microsoft® Windows® 7 or Windows® 8.1 limits users' rights to certain directories with User Account Control (UAC) enabled. Due to these limitations, it is recommended that Engagement not be installed to the C:\Windows, C:\Windows\System 32, or C:\Program Files directories. For additional information, refer to [Microsoft's Windows Vista Application Development Requirements for User Account Control Compatibility](#) document. Please contact Technical Support for installations of Engagement v7.2 or higher that currently exist in these locations.

Microsoft® Office 2013 Ribbon

The Engagement menu items will appear on both the Engagement Ribbon and on the Add-Ins tab. It is possible to disable the Engagement Ribbon functions by going to the Excel®/Word Options and choosing Add-Ins. Select **Manage COM Add-ins** and uncheck **Pfx.Ribbon.ExcelAddIn** (for Excel®) or **Pfx.Ribbon.WordAddIn** (for Word) from the list of Add-Ins available.

Microsoft® Office 365™

Microsoft® offers multiple packaging options (called “plans”) for Office 365™, which are either available with online only versions of the Office applications or desktop versions. (For example, Office 365™ Midsize Business or Office 365™ Enterprise E3.) To use Office 365™ with Engagement, you must subscribe to a version of Office 365™ that includes a desktop version and have the desktop version of Office installed on the PCs that will be running Engagement. In this scenario, the experience is essentially the same as the running Microsoft® Office 2013.

Note: CCH does **not** currently have plans to support online only versions of Office. This is largely due to the fact that Microsoft® does not support customized ribbons/add-ons in the online versions.

Go here for a comparison of the different [Microsoft® Office 365™ plans](#), and which ones include desktop versions of the applications.

Office Servers/Administrator Module

Changing the computer name after Engagement is installed is not supported. Changing the computer name may cause login failures, synchronization failures, and database errors.

System time clocks must be synchronized across all office servers to ensure proper data flow between servers. Failure to properly ensure that all time clocks are synchronized before performing Administrator module functions may result in data loss.

Static IP addresses are recommended for all office servers.

All office servers should be synchronized before adding a new office server or updating to a new version of Engagement.

All Administrator users must have access and rights to the Admin Share directory on all office servers.

Export to Tax

Dynalink from Engagement to CCH® Global fx Tax through a Citrix® session is not supported.

Dynalink to both Global fx Tax and the desktop application for a single client is not supported.

When using the Dynalink option to export trial balance data to CCH® ProSystem fx® Tax or CCH Axxess™ Tax, the Employer ID # (EIN) used for the Dynalink configuration on the Tax Software Interface dialog in Engagement must be unique. If you have multiple clients that will be using the same EIN, please add additional characters to the end of the EIN to make each one unique (e.g., 99-999999-1).

Synchronization

Synchronization utilizes two services for data transfer. The services are PFXSYNPFTService.exe and PfxEngDesktopService.exe. For further information regarding these services and how they function, please refer to Appendix E in the *User Guide*.

General

Engagement toolbar customizations may be made using a 1024x768 or greater screen resolution. Lower screen resolutions may result in the inability to view additional toolbar buttons added to the Engagement toolbar.

Large fonts are not supported by Engagement.

CCH Software News Delivers Valuable Product Information via Email

CCH Software News expedites important CCH ProSystem *fx* product information to your firm via email. Technical bulletins, tax, technical discussions and product update notifications are forwarded directly to your individual and/or firm's email address, ensuring that you are kept abreast of pertinent issues which affect your CCH ProSystem *fx* products.

If you provided an email address with your order, you are already registered for CCH Software News and will receive information on the products your firm is currently licensed for in the near future. We encourage you to visit our website at [CCH Support Online](#) and click on **CCH Software News Profile Setup** to establish or modify your firm's CCH Software News profile to ensure you are receiving information on all the CCH ProSystem *fx* products you desire.