ProSystem FX/Caseware to AdvanceFlow Conversion Setup Assistance Call

Introduction

This guide outlines procedures to follow during the ProSystem FX or Caseware to AdvanceFlow Conversion Setup Assistance call with the firm. The goal of this call is to ensure that the firm (following best practices) can convert at least one client engagement binder from ProSystem FX Engagement (PFX) or Caseware into AdvanceFlow. This call will typically be handled by a resource within AdvanceFlow Support.

Overview

When a firm signs a contract for AdvanceFlow, they go through a phased approach to implement the product:

If the firm utilizes PFX or Caseware, they will also be scheduled for a Conversion Setup Assistance Call:

The Support resource will handle the following:

1. If converting from PFX, verify that one PC in the firm's office has the ProSystem FX Engagement Workpaper module installed locally.
2. Install and update the conversion utility on that same local machine.
3. Test the conversion utility on a small engagement from the firm. Make sure it is not a consolidation or divisional trial balance, with a small chart of accounts and workpapers.
4. Follow up with the assigned Consultant and User Services – Operations with the events of the call.

Scheduling
User Services – Operations will propose a scheduled time for the conversion call. Once accepted by the firm, it will be added to the Support resource's Aspect schedule as a TCIS item not to be overbooked. The call will be scheduled for 1 hour. If a schedule update is needed after the call is complete, the Command Center should be notified to update Aspect accordingly.

Expectations
In order to ensure a successful conversion call, the following expectations must be met:

- The Support resource must be included in the emails to the firm from User Services – Operations regarding implementation.

- The consultant must verify that:
  - Login credentials and permissions are setup for conversion
  - At least one engagement type is setup and enabled
  - A test client is available to convert into all new databases. Convert into the test client if firm is using a new database. If the firm has an existing GoFileRoom database which no longer has the test client, they will select the client to convert into during the call.

- The consultant must provide the Support resource:
  - Two surveys completed by the firm that include:
    - Overall IT survey regarding general network and software setup
    - An AdvanceFlow specific survey, including how PFX is deployed at the firm
  - Login credentials for the support or admin account
  - Any additional information as needed.

- The firm's IT staff or consultant must:
  - Be the main contact for the conversion call.
  - Have access to at least one staff person involved in the implementation in order to answer any processing questions (which TB should convert, which grouping, etc.) or data validation.

- If converting from PFX, the firm must have PFX Workpaper Manager installed locally prior to the conversion call.
  - The firm can install the conversion tool on a network or terminal server for firm-wide implementation **at their own convenience**. This conversion call is NOT to assist or troubleshoot with this process.
  - Any issues that arise from a network or terminal server installation of the conversion will be handled by **general Support** for assistance (not the consultant during the Business Process Analysis).

  - If Support determines the network or terminal server issues are due to the conversion being run outside of best practices, the firm is expected to implement best practices to successfully run the conversion.

Additional Information

If there are any issues during the call (as long as best practices are in place), the Support resource will own and troubleshoot them until at least one engagement is successfully converted, making sure to keep the consultant informed of the status.

Any issues that cannot be addressed with normal troubleshooting should be sent over to the Conversion Development Team per usual channels.