

ProSystem fx® Document (SaaS)

Release Bulletin

Release 2012-1.0

December 2012

Welcome to ProSystem fx Document (SaaS) 2012-1.0

This bulletin provides important information about the 2012-1.0 release of ProSystem fx Document (SaaS). Please review this bulletin carefully. If you have any questions, please call Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 6. Additional information is available at CCH [Support Online](#).

Integration Enhancements

Batch Client Linking

A new Batch Client Linking utility allows you to link clients from ProSystem fx Tax, Global fx Tax, and ProSystem fx Engagement to existing clients in ProSystem fx Document (SaaS). You can create and export a list of clients from Tax or Engagement, and then import and match the clients using this utility. The utility can be accessed in Dashboard by selecting **Applications > Utilities > Batch Client Linking Utility**. Once clients are linked, you can save returns from Tax and workpapers from Engagement to Document without selecting the client again.

Enhanced Workstream (SaaS) Integration

A new split-screen view on the Workstream Project's Linked Documents tab allows you to see which of the client's files that are stored in Document have been linked to the project and which have not been linked. You can see all of the client's files that are stored in Document from within Workstream, and you can link or unlink files by dragging them.

Print Practice (SaaS) Invoices to Document and to Portals Integrated with Document

You can now print invoices from Practice (SaaS) to Document (SaaS) for permanent storage. You also have the option to bill your clients by publishing invoices to portals that are integrated with Document. A firm administrator must set up the Practice interface prior to use. To perform this setup, in Dashboard click **Applications**, and then select **Document Settings & Defaults > Practice Mapping**. The options that must be set up include default metadata, file naming conventions, and default portal publishing options.

Usability and Ease of Use

Document Central - Organizational Units

Firm, Office and Business Unit entity types have been split into separate buttons in the main navigation pane so that you can view more of the folder structure for these entities. This update also makes the experience of working with these entity types more consistent with the experience of working with other entity types.

Document Central - Entity Lookup List

The entity lookup list in Document Central has been updated to provide the following productivity enhancements:

- ◆ The entity lookup list expands by default. Also, if you switch entities or log out, the list retains its collapsed or expanded state.
- ◆ The entity lookup list automatically resizes to the width of the longest entity name in the list. Also, the text box for entering the entity name automatically resizes when you expand the main navigation bar.
- ◆ When you start typing in the entity lookup field, the first item in the auto-suggest box is highlighted automatically. Press **Enter** or **Tab** to select the highlighted item. When you press **Tab**, the focus moves to the storage folder browse button. Pressing **Enter** or the spacebar selects the button and displays the entity's folder structure.

Add Files Screen Usability Enhancements

When you enter an entity name or ID on the Add Files screen, the first item in the auto-suggest box is highlighted automatically. Press **Enter** or **Tab** to select the highlighted item. When you press **Tab**, the focus moves to the storage folder browse button. Pressing **Enter** or the spacebar selects the button and displays the entity's folder structure. These changes allow you to add files to Document with fewer clicks.

Firm Requested Enhancements

Document Availability When Portal is Unavailable

When using ProSystem fx Document (SaaS) with the version of Portal that integrates with Document, issues preventing Portal from being accessible no longer affect Document (SaaS) users. If you attempt to use Portal-related functionality, and Document cannot reach the Portal server, an error notifies you that Portal cannot be contacted at this time. Document disables any Portal-related functionality. When Portal service is restored, the system notifies you to save your work and restart Document to reestablish the link between Document and Portal.

Task Assignments - Split-screen View

A new split-screen view on the Task Assignments tab in Document Central and in Dashboard allows you to see both the tasks that you have assigned to others and the tasks that have been assigned to you. You no longer must group the Tasks Assignment grid to see who is assigned to each task.

Task Assignments for Users without Access

If a staff member does not have permission to access a client, but you want the staff member to perform work on a file for that client, you now can grant limited access to the file using the Task Assignments feature. When you assign a file task to a staff member who does not have access to the file, the system prompts you to provide temporary access and permissions. Once the staff member has completed the task and assigned it back to you, the staff member will no longer have access to the file.

Routing Slip Icon

A new Routing Slip icon identifies files for which routing slips have been created, but for which the files have not been scanned yet. The Routing Slip icon is displayed in all file grids.

Folder Column in File Grids

A new Folder column is now available for use in file grids. This optional column displays the name of the folder where a file resides. You can display or hide this column using the Add/Remove Columns option. To access this option, right-click any grid column header in Document.

Client Dashboard

A new Client Dashboard feature allows you to more easily access client information, such as client and contact details. When other products such as ProSystem fx Practice or Workstream are installed, additional information related to invoices, project listings, AR Balance, AR Charges and Credits, and Work in Progress, is also available.

Architectural Enhancements

Windows 8 Compatibility

ProSystem fx Document (SaaS) now supports workstations running the Windows 8 operating system. The Windows RT operating system is not supported. Mouse and keyboard input are the only input methods supported. Touch input is not supported.

Roaming and Redirected Profiles/Folders

ProSystem fx Document (SaaS) now offers more support for roaming and redirected profiles and redirected folders. Configuration options have been moved to the AppData\Roaming folder so that they are accessible to users of roaming or redirected profiles.

Hosted Exchange Support

ProSystem *fx* Document (SaaS) now supports some hosted Exchange environments. Please contact support for details and additional information.

ADDITIONAL INFORMATION

You can learn more about ProSystem *fx* Document by visiting our Web site [here](#), or by contacting your local sales representative.

Please visit [Customer Support Online](#) to stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.