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Release Notes

Release 2018-3.5
June 2019

CCH® ProSystem *fx*® Document

Welcome to CCH ProSystem *fx* Document 2018-3.5

This bulletin provides important information about the 2018-3.5 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

Change in Upgrade Services

Beginning with this release our upgrade services will be offered in two ways:

- Self-service with appropriate documentation as a guide
- Work with an experienced representative for upgrades after-hours as a paid service

Support will continue to assist with questions or technical problems experienced during all *self-service* upgrades.

New in This Release

Recycle Bin Search
A new search option has been added to the *User deleted* and *Expired* recycle bin tabs. You can search by Entity Name, Entity ID, Responsible Staff, and Deleted by. Only entities which meet your specific criteria and have deleted files display. Click enter on your selection or click the search button to return results. Click **Reset Grid** to clear your search results.

Entity ID Column
A new Entity ID column has been added to the *User deleted*, *Expired*, *File deletion log* and *Cloud purge restore* recycle bin tabs. The column can be filtered and sorted.

Microsoft® Office 2019
Beginning with this release, Document is compatible with Microsoft® Office 2019.

Microsoft® Office Windows 10 Version 1809
Beginning with this release, Document supports Microsoft® Office Windows 10 version 1809.

Client Manager Quick Search Export
You can now export all pages from the client quick search view, up to 20,000 rows. Other views in Client Manager continue to export the current page.

Modifying Historical Clients and Staff
Historical clients and staff are retained for reporting. They are not visible in most parts of the CCH ProSystem *fx* suite and cannot be deleted. Beginning with this release, you can change:

- The ID, sub-ID, and sort name of historical clients.
- The user ID, staff ID, report name, and system email address of historical staff.

Modifying these attributes makes the original values available for other clients or staff. It can also offer more control over how historical clients are listed in relation to active clients when grouped, sorted, and subtotaled in reports. You must have the Client ID functional right (Edit) in any organizational unit to edit historical clients. You must have the staff profile functional right (Edit) in any organizational unit to edit historical staff.

Resolved in This Release

We have resolved an issue where the Date Modified and Modified By columns were changed when viewing the history of a file.

Known Issues

When you install the latest version of the Open Integration Kit, version 8.3, you will receive an error message indicating that required DLL files are not available. This will result in the inability to add files to Document through the integration kit. This issue only affects adding files to Document when Document is not installed on the machine. Our engineers are working on a solution, which we expect to release with the 2018-4.1 release in July.

In the meantime, please find details on how to resolve this issue using the following knowledge base link: Users are unable to add files to Document through the CCH Axcess™ Open Integration Platform, version 8.3.