

CCH[®] ProSystem fx[®] Document

Welcome to CCH ProSystem fx Document Release 2015-4.1

This bulletin provides important information about the 2015-4.1 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Search Results Expanded 10 Times

Document's file search feature has been optimized to return up to 10 times more files than in previous versions. Search results now can include up to 2,000 files per search.

Export Search Results to CSV

You can now export Document search results to a CSV file, allowing you to open search results in Microsoft[®] Excel[®] for analysis or reporting.

Microsoft[®] Office 2016 Compatible

Document and its plug-ins to Microsoft[®] Office have been tested and certified as compatible with Microsoft[®] Office 2016. Microsoft[®] Office 365™ subscribers can now locally install Microsoft[®] Office 2016, and then install and use the Document plug-ins.

Extended Storage Folder Updates

When you update the Sort name, ID, or Sub-ID for a client, non-client, or staff member, the extended storage folder name now updates to match. If an invalid character is used in these fields, it is not included in the folder name. If you move a client, non-client, or staff member from one office to another, the files for that entity move to the storage area for the new office so you can more easily locate them.

New Permission for Recycle Bin Options

A new permission that controls user access to the Recycle Bin Options window (where automatic purge settings are maintained) has been added. This new permission prevents staff with access to the recycle bin from accidentally modifying purge settings, which could result in a loss of data. Firm Administrators and members of the Full Rights security group will automatically inherit this permission. Other staff must have the permission granted to them in a security group.

Citrix XenApp v. 7.6 and 7.7 Compatibility

Document now supports Citrix[®] XenApp v. 7.6 and 7.7. XenApp 5, 6, and 6.5 are no longer supported.

Adobe[®] Acrobat[®] 11 Compatibility

The Document plug-in for Adobe[®] Acrobat[®] now supports Adobe Acrobat 11. Adobe[®] Acrobat[®] 9 is no longer supported.

SQL Server[®] 2012 and SQL Server[®] 2014 (running in SQL 2012 Compatibility Mode)

As announced with release 2014-5.0, Document is now compatible with SQL Server[®] 2012 and SQL Server[®] 2014 (running in SQL 2012 Compatibility Mode). As Microsoft[®] ended mainstream support for SQL Server[®] 2008 and 2008 R2 on July 8, 2014, SQL Server[®] 2008 and 2008 R2 are no longer supported by Document.

Hosted Exchange

Cloud-hosted Exchange or other Internet-based email is now supported.

Fixed in this Release

Storing Login Credentials for CCH® ProSystem fx® Tax and CCH® Global fx Tax Integration

A change in Tax earlier this year resulted in users being required to provide login credentials once per session when printing from Tax to Document. With this release, the system prompts you to log in using the Document login window. You can check a box on this window to save your credentials. When you send returns from Tax to Document, your saved credentials are used, and you can simply click **OK** to log in.

Files Remaining Checked-out After Closing

We fixed an issue where files opened for direct edit were remaining in checked-out status after closing.

Microsoft® Excel® Freezing When Working in One Workbook and Previewing a Different Workbook in Document

Excel® no longer freezes when you are working in one workbook in Excel® and previewing another workbook in Document.

Error Received When Deleting Folders from Folder Template

Deleting an unused folder from a folder template no longer causes an error.

Document Share Safe Permission and Feature Hidden

We have hidden a permission and feature that is not available in CCH ProSystem fx Document.

Error Received When Sending Attachments after Enabling "Forced Confirmation of the File Attachments"

Errors no longer occur when sending file attachments after enabling forced confirmation of file attachments.

Microsoft® Outlook® Plug-in Error When Saving an Email Created in Rich Text Format

Saving rich text format emails to Document using the Outlook plug-in no longer causes errors.

Errors Received While Performing Firm Configuration Updates

Performing firm configuration updates such as enabling forced confirmation of file attachments or modifying the retention of a class or subclass and applying the change to existing files no longer causes errors.

Direct Edited .MSG Files Did Not Always Check-in Upon Closing

Microsoft® Outlook® .MSG files now check-in automatically when they were closed and Document is configured to automatically check-in files automatically.

Local Routing Queue Running in Different Sessions

When the Local Routing Queue is started multiple times, in different sessions, errors such as "File already routed" or "Error in copying file to storage directory" no longer occur.

Microsoft® Word 2013 Crashed When Closing a File That Had Been Opened via Office Plug-in

Microsoft® Word 2013 no longer crashes when you close a file was opened through the Office plug-in on a computer using the Microsoft® Windows 10 operating system.

Advanced Search Errors

Performing advanced searches that include full-text search plus any other field with an operator of "Is blank" or other field with a non-text value (for example, a date or check box) no longer causes an error.

File Watcher Catalog Utility Stops When File Path is Too Long

The File Watcher Catalog Utility service no longer stops whenever it encounters a file with a file path longer than 260 characters. Instead, these files are skipped and the utility continues to the next file.

Integrated Portal - EULA Acceptance List

The EULA Acceptance List now displays the user's name. The published EULA now displays for all users.

Integrated Portal - Errors Received when Creating or Deleting Folder Templates

Creating or deleting folder templates with a large number of folders no longer causes an error.