

ProSystem fx[®] Document

Release 2011-3.5

May 2012

Known Issues with ProSystem fx Document (SaaS and On-Premise)

We are continually improving the ProSystem fx Suite. Listed below are issues we are currently working to resolve. Please review this bulletin carefully prior to installation. If you have any questions, please call Customer Support at **1-800-PFX-9998 (1-800-739-9998)**, Option 6 for Document (On-Premise) support or **1-877-977-9739, Option 3** for Document (SaaS) support, or contact support on line at CCH Support Online (<http://support.cch.com>).

ProSystem fx Document (SaaS and On-Premise)

- ◆ During the upgrade process, the installation program may report an error on the Install and Update screen. Clicking the **View** button opens the Support web page, but there is no indication of what the error may have been or what may have caused the error.
 - **Solution:** Execute the installer directly from the OFFICEFRAMEWORK directory under the Smart Client directory. The framework installer is named Office2007us.msi. When the framework installer is executed, it will display a message indicating whether the install was successful or not. If not, the system will provide an error message explaining why the install was not successful.
- ◆ Funnel filters do not work for some columns in Document Central. When clicking on the funnel icon, an empty context menu is displayed. This occurs for the following columns only: Modified By, Document Type, Business Unit, Created By, Date Created, and Expiration Date.
- ◆ When performing a Quick Search using wildcard characters ? or * with a search term containing a space, the search will return zero results.
 - **Workaround:** When using wildcard characters, limit search terms to a single word. Alternately, you can perform multiple word searches without using wildcard characters.
- ◆ When updating multiple clients, the Document and Portal tabs in the Client Profile disappear after clicking **Save and Next**.
 - **Workaround:** If changes are required on the Document or Portal tabs, do not edit multiple clients. Instead, edit the clients individually.
- ◆ During the check-in process, if you select to send the check-in email and attach the file to the email, the email is not sent.
 - **Solution:** If you clear the *Send as attachment* option, the email will be sent.
- ◆ User Activity and File Activity audit trail reports display the incorrect time. Times displayed are not in the local time zone; they are displayed in the GMT time zone.
- ◆ When the user direct edits a file and closes it without making any changes, the check-in prompt is displayed, even though the user option for check-ins is set to *Prompt to check in only if the file is changed*. This issue has only been identified with Excel, PowerPoint, and .MDB file types.
- ◆ File naming conventions are not applied to a file that is renamed in the Duplicate Files window.

- **Workaround:** When renaming the file in the Duplicate Files window, enter the filename as it should be displayed according to the file naming convention.
- ◆ Selecting the Add Favorites dropdown button on an entity's Root folder displays *No Entity Selected* error.
 - **Workaround:** Instead of setting the Root folder as the favorite folder, select the entity itself instead. Then, when you click on the entity on the Favorites screen, Document will display all of the files for the selected entity.

ProSystem fx Document (On-Premise only)

- ◆ In some Citrix environments, when attempting to direct edit a file, the system will display an error, and the direct edit fails.
 - **Solution:** Please contact Document Support at 1-800-739-9998, Option 6, for updated DLL files. Installing these should resolve the issue, and users will be able to direct edit files in these Citrix environments.
- ◆ In some Citrix environments, performing a word search does not return results for Microsoft Word files or PDF files. Word search works as expected for other file types.
- ◆ A configurable check-in prompt time delay can now be set to prevent users from receiving the *Check in*, *Check in and keep checked out*, or *Cancel Checkout* dialog immediately after opening a QuickBooks file from extended storage. If this delay is set too high, a user can open and close the QuickBooks company file before the time delay completes. The *Check-in* dialog will then not be displayed until the time delay completes.
- ◆ When changing a client name or client ID, if the client has extended storage area folders, the extended storage area folder name that represents the client does not get updated. Files can still be accessed from within Document or Windows Explorer, but the folder path in Windows Explorer will not match the new client name.
- ◆ When direct editing a file in extended storage, if the session times out, you cannot check-in the file. The system will display the following error message: "File not found in drafts folder."
 - **Explanation:** When managed area files are direct edited, a copy of the file is downloaded and saved to the user's Drafts Folder inside the user's My Documents directory. When extended area files are direct edited, they are opened directly from the storage location and are not copied to the Drafts Folder. If you try to check-in after a session timeout, the system does not recognize that this is an extended area file, and the system looks in the drafts folder for the file. When the file is not found, the error message displays.
 - **Workaround:** Right-click on the file in Document and select **Cancel Check-out** from the file context menu. Since changes to files are saved directly to the storage location, no data loss should occur.
- ◆ Changes made to an existing office profile for the watcher service are not seen by the watcher service. When a new office is created, the new instance of the watcher service does not start automatically.
 - **Explanation:** The watcher service only watches the folders and locations specified when the service is started. When new offices are created or existing offices edited, the changes are not recognized by the watcher service.
 - **Solution:** Restart the watcher service.
- ◆ If the Local Routing Queue is started before logging into Document or the Smart Client for the first time, the routing queue will not pick up and route files.
 - **Explanation:** The first time you launch Document after installation, a file named Security.xml is created in the user's AppData folder. This file is required for the local routing queue to work properly.
 - **Solution:** Launch Document prior to launching the local routing queue for the first time.

ProSystem fx Portal Integration with Document

- ◆ Firm users are unable to change the Security User Role for additional portal users added to the portal.
 - **Solution:** The portal user's access must be removed and then re-granted to apply the new roles.

- ◆ When performing an Advanced Search where the Checked Out Staff criteria is set to the firm administrator, files which are published to the portal, are checked out by the firm administrator, and which have an expected check-in date that is in the past (overdue checked out files) are not showing in the search results.
- ◆ When files that are published to Portal expire in Document, they should be removed from the Portal and moved to the Document recycle bin. Instead, the files are being removed from Portal, but are not automatically moving to the recycle bin.
 - **Workaround:** Run an Expiration Report for each office and set the Expiration Date to be less than today's date.

ProSystem fx Tax Integration with Document

- ◆ When printing an Individual tax return to Document for the first time, the Client Linking dialog does not display if the return was not saved first. This does not apply to tax return types other than Individual.
 - **Solution:** Save the tax return before printing it and sending it to Document.

ProSystem fx Document Plug-ins to Microsoft Office & Adobe Acrobat

- ◆ The Office Plug-ins are not currently compatible with 64-bit Microsoft Office. A future release will provide support for 64-bit Office.

Note: You can still use 64-bit Office to open and work on files stored in Document; you just cannot install the Office Plug-ins.
- ◆ The Plug-in Framework now supports a plug-in to Adobe Acrobat X; however, the Plug-in Framework will not be installed automatically on machines that do not have Microsoft Office installed.
 - **Explanation:** The Install and Update manager requires that Microsoft Office 2007 or 2010 are installed prior to installing the Plug-in Framework.
 - **Solution:** Manually deploy the .api file. Copy the Cch.Pfx.Document.AcrobatPlugin.api file from the Smart Client\SaaS\FRAMEWORK (or, for the on-premise version, SmartClient\OP\Framework) directory to the installed Adobe Acrobat plug-ins directory. This directory typically is C:\Program Files (x86)\Adobe\Acrobat 10.0\Acrobat\plug_ins.
- ◆ If the Outlook Add Files screen is left open for more than 20 minutes, and then the user drags an email message to the Add Files screen, the user receives the message: "An error has occurred."
 - **Workaround:** If the Outlook Add Files screen has been open for more than 20 minutes, cancel out of the screen, and then launch it again. If other Office applications are open, the Shell application may still be open. Once the error occurs in Outlook, Outlook and all other Office applications must be closed. Then, Outlook can be restarted, and the plug-ins will be functional again.
- ◆ While uninstalling the Office Plug-in Framework, selecting **Cancel** will prevent the framework from uninstalling successfully.
 - **Solution:** Please contact Document Support at 1-800-739-9998, Option 6, for assistance in uninstalling the Plug-in Framework.

XCM Integration with ProSystem fx Document (On-Premise)

- ◆ XCM Integration with Document (On-Premise) requires that the firm open up a port in the firewall so that XCM can reach the Document web services.
 - **Explanation:** Because XCM is a SaaS cloud-based application, and Document is an on-premise application that sits behind a firm's firewall, XCM is unable to make service calls to the Document web services unless a port is opened in the firewall. CCH is working with XCM to resolve this issue.
- ◆ XCM Integration with Document (On-Premise) is not currently supported when using Active Directory authentication mode in Document.

- **Workaround:** Use Document (On-Premise) with CCH Authentication instead of Active Directory authentication. This will require that users log into Document with a user name and password. CCH is working with XCM to resolve this issue.
- ◆ Changes to extended area files from XCM are not being retained.
 - **Explanation:** The XCM integration was not designed to allow opening files stored in extended storage from within XCM.
 - **Workaround:** Only open managed area files from within XCM. Extended area files should be opened directly from Document or Windows Explorer.
- ◆ If a user opens a file for direct edit from Document, cancels the checkout of that file from within XCM, and then saves and closes the file, an error will occur.
- ◆ If a user has a locked file, clicks **Cancel Check out** in XCM, and then opens the History for the file in Document, a comment will appear that says "Locked file cannot be cancel checked out."
- ◆ After direct editing a file from XCM, if you select **Cancel** on the dialog that asks if you want to check in the file, you will be prevented from accessing the file from Document. If this happens, cancel the check-out from within Document, or re-open the file from XCM using Direct Edit, and then close it again, clicking **OK** on the dialog that asks if you want to check in the file.
- ◆ If a file is direct edited or checked out in Document, and someone tries to open it from XCM, an error will occur.
- ◆ To use Direct Edit, you must first disable User Access Control (UAC) and install the DirectEdit.Setup file. This file is downloaded and installed the first time you use Direct Edit from XCM. After it is installed, UAC can be returned to its normal setting.

ProSystem fx Document Data Migration

- ◆ When migrating a client with more than 1 GB worth of files, the migration could fail for the client. Migration will continue for other clients.
 - **Workaround:** Prior to migration, ensure that no clients have more than 1 GB worth of files. Delete unnecessary files or delete unused previous versions of files.
- ◆ Migrating a client as a staff member and then linking to an existing staff in the suite will prevent file migration for that client.
 - **Workaround:** Prior to migration, ensure that you have not created a staff to link the client to.
- ◆ When migrating a client as staff using the Lastname, Firstname format, the system is including the comma in the last name field.
 - **Workaround:** After migrating the client as a staff member, edit the staff member's last name and manually remove the comma.
- ◆ In-place migration does not remove all versions of files from the Foundation storage area when the new version of Document is set to allow fewer versions than the Foundation version.
 - **Solution:** Please have your firm's IT or System Administrator contact Document Support at one of the numbers below for a script that can be run to delete the older versions.
 - **Document (On-Premise) support:** 1-800-739-9998, Option 6
 - **Document (SaaS) support:** 1-877-977-9739, Option 3
- ◆ When migrating Foundation users, on the screen where the user is asked to select how to create User IDs in the new Document program, selecting any option other than "Existing Foundation ID" will result in the User ID being created to match the Foundation ID unless the ID has fewer than 6 characters, in which case it will be assigned a 6-digit number.