

ProSystem fx® Document (On-Premise)

Release Bulletin

Release 4.1.1

October 2011

Welcome to the ProSystem fx Document (On-Premise) Release

This bulletin provides important information related to the 4.1.1 hot fix patch of ProSystem fx Document (On-Premise). 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 8**, or contact support online at <http://support.cch.com/suite>.

NEW IN THIS RELEASE

The following is a list of issues resolved by the Document On-Premise 4.1.1 hot fix patch:

Document (On-Premise) integration with Microsoft Office

ProSystem fx Plugins for Microsoft Office would not work if Dashboard or an Office application was already open. With this patch, the account number must be entered and at least one non-space character in the User ID field on the Office Plug-in Configuration Credentials window.

Active Directory (AD) integration with Microsoft Office Plug-ins

A login conflict occurred between Microsoft Excel and Outlook when a firm used Active Directory integration.

Quick Search results included files for clients protected by client access groups

When using a client access group to restrict certain clients from view, users could still see files/folders for these clients by performing a quick search. Users could also check out some files manually and view them, which should be restricted.

Blank error message displayed for Advanced Search results

When performing an Advanced Search, a blank error message displayed.

ProSystem fx Engagement error when using Office integration

An error displayed when launching Office applications through third party applications that had their own Office plugins installed.

Client Import Utility not available

The Client Import Utility did not display as an available option.

Users could access other staff when protected by staff access groups

Some staff members were able to view details of other staff members who were protected by staff access groups.

Purge engine caused performance issues and deadlocks

The purge engine moved expired files to the recycle bin, even when the firm had disabled the feature.

Active Directory session times out after 20 minutes

When using Active Directory integration, users received a timed out message after 20 minutes.

Unable to delete routing slip

Users were unable to delete routing slips from the right-click menu.

Permanent files moved to recycle bin after data migration

Permanent files in ProSystem fx Document (Foundation) v. 3.x were saved in the database with an expiration date of 1/1/1900. When these files were migrated, they were identified as expired and moved to the recycle bin by the purge engine. The system now ignores files with an expiration date of 1/1/1900.

Cannot direct edit QuickBooks files in extended storage

When direct-editing QuickBooks company files, users received an immediate request to check-in the file after opening the file.

Dashboard will not open when regional settings are set to Canada

The Dashboard would not launch when the user's regional settings were set to Canada.