

## ProSystem *fx*<sup>®</sup> Document (On-Premise)

Release Bulletin

Release 4.1.2

February 2012

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

This bulletin provides important information related to the 4.1.2 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 6**, or contact support online at <http://support.cch.com/suite>.

This release bulletin covers areas including Tax integration, XCM integration, and customer reported issues addressed by the Document (On-Premise) hot fix 4.1.2.

**Important:** It is **imperative** that all firms install this patch to all servers and all workstations. This patch updates the database, and those updates **must** be in place before upgrading to the next release after tax season.

Please see the *Important Release Information* section at the end of this release bulletin for more information.

### NEW IN THIS RELEASE

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#### Tax Integration

Prior to the release of this patch, firm users had to manually select the client, storage folder and metadata (class, subclass, etc.) for tax returns printed to Document On-Premise and had to manually rename tax returns. With this update, firms can predefine the default metadata and tax file naming conventions to be applied to tax returns printed to Document.

Client Linking is **not** available with this patch, but will be made available in the next release after tax season. The workflow for this integration is as follows:

1. Configure Tax Mapping and Naming Convention in Dashboard (Document Settings & Defaults -> Tax Mapping).
2. Print tax return to Document (File/Print/To PDF/Print to ProSystem *fx* Document).
3. Save the return in Tax when prompted.  
**Important:** Do not change the default name that Tax gives the return. This tells Document which naming convention and tax mapping to apply. If you change the return name in Tax, the integration will not work.
4. The Document Add Files opens.
5. Select the Client manually by entering the client name or client ID into the Entity Name field.
6. Click Apply to Selected.
7. The file that is displayed in the Add Files dialog will be updated with the naming convention and tax mapping details that were defined for that return type in Dashboard.
8. Click Upload Selected Files.

#### Known Issues with Tax Integration:

- ◆ In Tax, the settings in Options/Interface Options/ProSystem *fx* (SaaS and OP) **do not work**. Regardless of what account number, user name, and password is entered here, the user will have to log in to Document manually if Document is not already opened when the Print job is called.
- ◆ The integration is fully dependent on the name that Tax gives the return when the return is created.
  - Do not change the name that Tax assigns to the return.
  - Producing one PDF for all copies of the return in Tax will break the integration. The integration relies on the file name from Tax, and when all copies are combined into one PDF, the name applied by Tax changes.

- Producing a separate K1 PDF file for each K1 will break the integration, because the individual K1s do not follow the standard naming convention that we are looking for.
  - Printing Selected Pages/This Form/Preparer Reports breaks the integration because all the file names are different in these scenarios.
- ◆ In Dashboard, there is an option on the Tax Mapping screen to “Hide Upload Screen.” This feature is dependent on the Client Linking piece being in place, which does not yet exist in Document On-Premise. Therefore, this option has been disabled with the patch. Regardless of whether customers select the “off” or “on” radio button, it will be disabled as it does not function.
  - ◆ This integration is intended to work only with 2011 Tax.

## **XCM Integration**

XCM is a SaaS only product – there is no On-Premise version of XCM. Firms will need to open up their IP address to the Internet for this integration to work. Foundation customers should already have this configured, as the same requirements exist for XCM with the Foundation Document integration. XCM Integration will allow users to add links to files stored in Document, Direct Edit those files, or remove links to files stored in Document.

Known Issues with XCM Integration:

- ◆ Direct Edit from XCM does not show in Document file History. Therefore, if someone wants to see who has the file checked out, they need to hover over the status indicator to see who has it checked out. The Document file History does properly indicate when a file has been checked in after being direct edited from XCM.
- ◆ If a user has a file open in Document, cancels the checkout of that file in XCM, and then saves and closes the Document, an error will occur.
- ◆ If a user has a locked file, clicks Cancel Check out in XCM, and opens History for the file in Document, a comment will appear that says “Locked file cannot be cancel checked out.”
- ◆ Direct Editing a file in XCM makes the file inaccessible in Document without message as to why the file is inaccessible.
- ◆ After Direct Editing a file from XCM, selecting Cancel on the dialog that asks if you want to check in the file will prevent accessing the file from Document. If this happens, the user must cancel the check-out from within Document or re-open the file from XCM using Direct Edit, and then close it again and click 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 which will be downloaded and installed the first time you use Direct Edit from XCM. After it is installed, UAC can be returned to its normal setting.

## **Customer Reported Issues Addressed**

- ◆ Users requested an option to have files be checked in automatically after direct editing them, instead of being prompted. A new User Option has been added that will allow each user to determine how to handle checking in files after direct editing them. Users can choose from the following options:
  - Automatically check in the file
  - Always prompt to check in the file
  - Prompt to check in only if the file is changed
- ◆ Integrated Portal users reported an issue that prevented them from downloading a read-only version of the file uploaded by the Portal users. This issue is resolved in this patch.
- ◆ Some users reported that saving Excel workbooks using the Excel Plug-in caused the files to be saved in “shared” mode, which prevented editing those files. This issue is resolved in this patch.

- ◆ Users of Microsoft Office 2007 SP3 were unable to install the Office Plug-in Framework. This issue is resolved in this patch.
- ◆ Users reported that after direct editing a file and selecting the cancel option, the file will remain checked out preventing other users from editing it. The user then had to go back and right-click on the file and select Cancel Check Out. The Cancel button has been renamed to **Cancel Check-out** and when the button is clicked, the file check-out will be cancelled and any changes made will be lost.

#### **Important Release Information:**

- ◆ The Document 2011-4.1.2 patch is cumulative – it also includes all of the fixes/updates that were included in the 2010-4.1.1 patch. ([Release Bulletin 2010-4.1.1](#))
- ◆ The 2011-4.1.2 patch will need to be installed on all computers at the same time (no mixed environments). As soon as you have updated the server, you must update each workstation before use.
- ◆ The installer always uses the default path first. If Document is installed in a different location, then the installer will need to be pointed there.
- ◆ The installer will run on a computer that does not have Document installed.
- ◆ The installer will not check if Document is open. Please make sure Dashboard and Document are both closed before running the installer.
- ◆ This update cannot be reverted. The only way to go back is to reinstall both server and client. Please be certain your database and files are backed up prior to running this patch update.
- ◆ Two of the bugs fixed were for Microsoft Office Plug-ins. Installing the patch will update the plug-ins. It is not necessary to reinstall the Plug-in Framework or individual plug-ins.