ProSystem *fx*® Document (On-Premise)

Release Bulletin

Release 2011-3.5

May 2012

Welcome to ProSystem *fx* Document (On-Premise) 2011-3.5

This bulletin provides important information about the 2011-3.5 release of ProSystem *fx* Document (On-Premise). Please review this bulletin carefully. If you have any questions, please call Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 6. Additional information is available on CCH Support Online.

IN THIS RELEASE BULLETIN

We are excited to release this update to the firm-hosted version of ProSystem *fx* Document. To help you plan and prepare for this release, we want to share the following information:

UPDATED RELEASE NUMBER CONVENTION

With this release, we are introducing a new release numbering convention. This change will provide consistency for release numbers across products in the ProSystem *fx* Suite. Document will now use the same release numbering convention that is used by ProSystem *fx* Tax. The release version numbers will be in the format YYYY-X.X, where YYYY is the current tax year (not the calendar year), and X.X is the release number. Throughout the course of the year, the release number will vary from 1.0 to 5.9.

NEW IN THIS RELEASE

The following features and enhancements are available in this release of ProSystem *fx* Document (On-Premise). Beginning with this release, both Document platforms (SaaS and On-Premise) will offer the same features, with three exceptions:

- Document (On-Premise) offers extended storage, which is not currently available on the SaaS platform.
- Some setup options are only applicable to Document (On-Premise) and will not be available in Document (SaaS).
- Document (On-Premise) is not currently compatible or integrated with the other ProSystem *fx* Suite (SaaS) applications, including:
  - ProSystem *fx* Tax (SaaS)
  - ProSystem *fx* Practice (SaaS)
  - ProSystem *fx* Workstream (SaaS).

Installation

A new Upgrade Wizard has been created to assist you with installation and to allow for future updates to ProSystem *fx* Document. The Upgrade Wizard uninstalls your current version of Document and automatically reinstalls the latest version. The Upgrade Wizard is available in a server edition and in a client edition. The server edition must be downloaded and installed before any client workstations can be updated.

Tax Integration

Document (On-Premise) is now *fully integrated* with foundation ProSystem *fx* Tax and includes the ability to link Tax clients with Document clients. The first time you print a return from Tax to Document, you must select the Document client that corresponds with the Tax client. This creates a link between the Tax and Document clients. When you subsequently print a return for the same client, the return will automatically be saved to the correct client in Document. You also can select default metadata to be assigned to returns that are sent to Document from Tax. You can specify different storage folders, file naming conventions, and metadata for each tax return type (Individual, Corporate, Partnership, etc.). You also can choose to show or hide the Add Files screen when a return is sent to Document.

Centralized Routing Queue Service

Document (On-Premise) now offers a centralized routing queue service that your firm can run on the Document server or on the ProSystem *fx* Scan Admin Server (if your firm licenses ProSystem *fx* Scan). The routing queue service does not require a Document user license. The workstation-based routing queue executable is still available for use with desktop scanners. Both routing queue options allow you to route scanned files to Document.

XCM Integration

You can link files stored in ProSystem *fx* Document to a project in XCM. Once you link a project, you can check out files from within the XCM project without launching Document. You can also search for clients or files stored in Document from XCM. The XCM view displays key metadata such as the check-in/out status, year, class, and subclass.

Known Limitations:

- The current XCM integration works only with CCH Authentication. It does not work with Active Directory Authentication. XCM is currently working on a fix for this issue.
- To use the XCM integration, firms must open a port in their firewall to allow XCM to communicate with the Document (OP) server.

Task Statuses

ProSystem *fx* Document now supports the creation of a simple task and allows you to track its status in relation to a file. A new Task Assignments option is available on the file context (right-click) menu which allows you to assign a file to another firm user, select a status, and assign a due date. A new Task Assignments tab on Document Central allows you to view the status of any tasks assigned to or created by you. A similar Dashboard pane is also available. These panes provide key information such as the task title; assignment information; task status; dates that the task was assigned, modified or due; and task approval information. Document can also be configured to send an email notification when the task status changes.

Adobe Acrobat X Plug-in

ProSystem *fx* Document now includes a plug-in to Adobe Acrobat X (Standard and Pro only). The plug-in adds an option to the Adobe Acrobat File menu that allows you to save the open PDF to Document. This plug-in can be installed from the Plug-ins tab on the Administration Manager User Options window. The firm must first install and enable the plug-in on the Plug-in Configuration tab of Document Settings & Defaults before you can install it.

Enable/Disable Email Attachment Encryption

You can now enable or disable encryption of email attachments sent from ProSystem *fx* Document. This firm setting applies to all users and to emails sent via the file context (right-click) menu or through the Outlook plug-in.

Drag and Drop from Outlook

You can now add an email or email attachment from Outlook 2007 or Outlook 2010 to Document by dragging the file to a client folder in the left navigation pane of Document Central. The Add Files screen displays so you can select the metadata (class, subclass, etc.) and then upload the file.

Office 2007 Service Pack 3 (SP3) Compatibility

The Microsoft Office 2007 Plug-ins can now be installed on computers with Microsoft Office 2007(SP3) installed. Firms using Office 2007 SP2 and older must upgrade to SP3 prior to installing the plug-ins.

Auto Check-In User Option

A new user option allows you to select what action Document should perform on a checked out or direct edited file when it is closed. You can choose from three options:

- Automatically Check-in the file
- Always Prompt to Check-in the file
- Prompt to Check-in only if the file is changed

This option can be set up in Administration Manager User Options on the Document tab.

Selecting Year Folders and the Year Metadata Option When Adding Files

When you add a file to a Year folder in Document, the system will prompt you to update the Year metadata field to match, if needed. This option helps ensure that documents are filed appropriately in Document.

Document Central

You can now search for and select clients using the Client Name Lookup under List Options. When you select a client in the lookup, that client is selected automatically in the client list, and the client's folder structure is expanded automatically, with all files for the selected client displayed. You do not need to right-click and select View All Files. Clicking the client name displays all files for the selected client. A new Root folder is displayed if the user only wants to view files stored at the root of the client or entity. Firms can enable or disable the use of the Root folder.

The file status icons are now different shapes to allow users who cannot differentiate between colors to quickly identify the file's status. Available/checked-in files will continue to use the ball icon. Files checked out or locked by the logged in user now display a checkmark in a box. Files checked out or locked by another user are identified by a ball icon with a checkmark in it. If you hover the mouse pointer over a status icon, the system displays the name of the user who has a file checked out or locked.

When you select a client, entity, or folder in the left navigation area, the File List tab's name changes to display the name of the client/entity and folder so that users always know which client/entity and folder they are browsing.

Adding Files

When you select a client/entity or a folder, and then click the Add Files button, the selected client/entity and folder are pre-selected on the Add Files Screen, so you do not have to select them again. This allows you to add files more efficiently.

Drag-and-Drop Options

You can specify how Document should handle files that you drop into the application. The options you can select are as follows:

- Dragging a .zip file to Document Central. You can select for Document to do one of the following:
    - Extract and upload each file individually
    - Upload the .zip file as a single file
    - Prompt to choose an upload option
- Dragging a non-PDF file with a duplicate filename to Document Central. You can select for Document to do one of the following:
    - Cancel upload of files with duplicate filenames
    - Ignore files with duplicate filenames (adds (#) after the filename, just like Windows does)
    - Overwrite files with duplicate filenames
    - Prompt to choose an upload option
- Dragging a PDF file with a duplicate filename to Document Central. You can select for Document to do one of the following:
    - Append existing file to new
    - Append new file to existing
    - Cancel upload of files with duplicate filenames
    - Ignore files with duplicate filenames (adds (#) after the filename, just like Windows does)
    - Overwrite files with duplicate filenames
    - Prompt to choose an upload option

♦ Dragging files between entities in Document Central. You can select for Document to do one of the following:

- Always copy
- Always move
- Prompt to move or copy

♦ Dragging a file to a client entity on Document Central and publishing to Portal. You can select for Document to do one of the following:

- Always publish
- Never publish
- Prompt to publish

Search Enhancements

A number of enhancements have been made to Document's search functionality, which will allow you to locate files more quickly. These enhancements include the following:

♦ A new search results tab has been added to Document Central. This tab displays when you use the Quick Search feature. Previously, search results displayed in a separate window.

♦ To improve search performance, search results are now limited to the first 200 files.

♦ To improve search results and speed, a new firm option gives you the ability to enable or disable full text searching by default. You can enable this feature at the time of searching, if needed. A new help bubble explains how to use search prefixes such as Class: or Client: to pre-filter search results. Detailed instructions are available in the help, if necessary.

♦ When you select a client or entity in the left navigation pane, the Quick Search field automatically defaults to search for files only for that client or entity. To perform a search of all clients or entities, simply clear the text box before entering search criteria.

♦ You can now use wildcard characters as part of your search criteria. An asterisk (*) can replace any number of characters, and a question mark (?) can replace a single character. This feature mimics current Windows search functionality.

♦ You can now filter search results by appending additional criteria to an existing search. You can also quickly remove appended criteria if the result set is too small.

Public and Private File Groups

You can now classify file groups as public or private. Public file groups can be accessed by all users with permission to use file groups. Private file groups can only be seen by the person who creates them. File groups can be used to logically group files together. Files in a file group can be from any client/entity or stored in any folder you have access to. Files in a file group can be checked out and checked in as a group, giving you quick access to multiple related files.

Reorganize Folder Template Folders

You can now specify the order of folders when setting up folder templates. This applies to both Document folder templates and Portal folder templates (if your firm licenses ProSystem *fx* Portal).

Integrated Portal and Batch Printing Tax Organizers

If your firm licenses ProSystem *fx* Portal, you can now create and edit portal users and assign them access to portals. You can also now create and edit an End User License Agreement (EULA) that must be accepted before your clients can access their portals. A report is available to identify the users who have accepted or declined the EULA.
You also can now manage client links and link clients in batches for integration with foundation ProSystem *fx* Tax. This step is a pre-requisite for printing organizers from Tax to Portal via ProSystem *fx* Document. You can now print tax organizers to portals that are integrated with Document. Your firm must approve organizers before they are available to clients. This feature allows firms to choose the clients to whom they want to send organizers.

Auto-Delete After Uploading

A new user option allows users to select whether to delete a file from their workstation after uploading it to ProSystem *fx* Document. To prevent users from accidentally working with local copies of files after uploading them to Document, the system can prompt the user to delete the local copy of the file. Since Document is the firm's selected file repository, we strongly recommend that no other versions of files exist outside of Document. Users can choose from three delete options:

- Prompt me to delete
- Always delete
- Never delete

ADDITIONAL INFORMATION

You can learn more about ProSystem *fx* Document by visiting our Web site here, or by contacting your local sales representative.

Please visit Customer Support Online to stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.