ProSystem *fx*® Document (On-Premise)

Release Bulletin

Release 2012-1.0

December 2012

Welcome to ProSystem *fx* Document (On-Premise) 2012-1.0

This bulletin provides important information about the 2012-1.0 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.

Integration Enhancements

Batch Client Linking

A new Batch Client Linking utility allows you to link clients from ProSystem *fx* Tax, Global *fx* Tax, and ProSystem *fx* Engagement to existing clients in ProSystem *fx* Document (On-Premise). You can create and export a list of clients from Tax or Engagement, and then import and match the clients using this utility. The utility can be accessed in Dashboard by selecting **Applications > Utilities > Batch Client Linking Utility**. Once clients are linked, you can save returns from Tax and workpapers from Engagement to Document without selecting the client again.

Usability and Ease of Use

Document Central - Organizational Units

Firm, Office and Business Unit entity types have been split into separate buttons in the main navigation pane so that you can view more of the folder structure for these entities. This update also makes the experience of working with these entity types more consistent with the experience of working with other entity types.

Document Central - Entity Lookup List

The entity lookup list in Document Central has been updated to provide the following productivity enhancements:

- The entity lookup list expands by default. Also, if you switch entities or log out, the list retains its collapsed or expanded state.
- The entity lookup list automatically resizes to the width of the longest entity name in the list. Also, the text box for entering the entity name automatically resizes when you expand the main navigation bar.
- When you start typing in the entity lookup field, the first item in the auto-suggest box is highlighted automatically. Press **Enter** or **Tab** to select the highlighted item. When you press **Tab**, the focus moves to the storage folder browse button. Pressing **Enter** or the spacebar selects the button and displays the entity's folder structure.

Add Files Screen Usability Enhancements

When you enter an entity name or ID on the Add Files screen, the first item in the auto-suggest box is highlighted automatically. Press **Enter** or **Tab** to select the highlighted item. When you press **Tab**, the focus moves to the storage folder browse button. Pressing **Enter** or the spacebar selects the button and displays the entity's folder structure. These changes allow you to add files to Document with fewer clicks.

Firm Requested Enhancements

Document Availability When Portal is Unavailable

When using ProSystem *fx* Document (On-Premise) with the version of Portal that integrates with Document, issues preventing Portal from being accessible no longer affect Document (On-Premise) users. If you attempt to use Portal-related functionality, and Document cannot reach the Portal server, an error notifies you that Portal cannot be contacted at this time. Document disables any Portal-related functionality. When Portal service is restored, the system notifies you to save your work and restart Document to reestablish the link between Document and Portal.

Task Assignments - Split-screen View

A new split-screen view on the Task Assignments tab in Document Central and in Dashboard allows you to see both the tasks that you have assigned to others and the tasks that have been assigned to you. You no longer must group the tasks grid to see who is assigned to each task.

Task Assignments for Users without Access

If a staff member does not have permission to access a client, but you want that staff member to perform work on a file for that client, you now can grant limited access to the file using the Task Assignments feature. When you assign a file task to a staff member who does not have access to the file, the system prompts you to provide temporary access and permissions. Once the staff member has completed the task and assigned it back to you, the staff member will no longer have access to the file.

Routing Slip Icon

A new Routing Slip icon identifies files for which routing slips have been created, but for which the files have not been scanned yet. The Routing Slip icon is displayed in all file grids.

Folder Column in File Grids

A new Folder column is now available for use in file grids. This optional column displays the name of the folder where a file resides. You can display or hide this column using the Add/Remove Columns option. To access this option, right-click any grid column header in Document.

Client Dashboard

A new Client Dashboard feature allows you to easily access client information, such as client and contact details.

Architectural Enhancements

Windows 8 Compatibility

ProSystem *fx* Document (On-Premise) now supports workstations running the Windows 8 operating system. The Windows RT operating system is not supported. Mouse and keyboard input are the only input methods supported. Touch input is not supported.

Roaming and Redirected Profiles/Folders

ProSystem *fx* Document (On-Premise) now offers more support for roaming and redirected profiles and redirected folders. The configuration options are now in the AppData\Roaming folder so that they are accessible to users of roaming or redirected profiles.

Hosted Exchange Support

ProSystem *fx* Document (On-Premise) now supports some hosted Exchange environments. Please contact support for details and additional information.

Common Report Manager

A common report manager now allows you to run reports related to the common data stored in Document. You can customize reports by specifying the selection criteria, fields to display in the reports, header/footer options, and the grouping and sorting options. You can run the following reports:

- Client List - List of client with telephone, address, and other contact information
- Client Notes - List of notes entered for a client

- Contact List - List of client contacts, including which clients the contact is related to and the contact information for each contact
- Staff List - List of staff members with contact information and administrative information such as salary
- Notification List - List of notifications from other ProSystem *fx* Suite applications (not applicable for Document On-Premise firms at this time)

Note: To use the Common Report Manager, your firm must enable and configure SQL Server 2008 with SQL Server Reporting Services (SSRS) prior to installation. Common Report Manager is installed separately through the Install and Update Manager. Please contact customer support for details and configuration assistance.

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.