

# ProSystem fx® Document (On-Premise)

Release 2010-4.1

July 2011

## Known Issues with ProSystem fx Document (On-Premise)

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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 or contact support on line at CCH Support Online (<http://support.cch.com>).

### ProSystem fx Document (On-Premise)

- ◆ When Outlook is not launched before Dashboard is opened, there is a significant wait before the Dashboard will respond to any clicks.
  - **Explanation:** You have at least one pane on the Dashboard to display Outlook content (email, calendar, etc.). Since Outlook has not been launched yet, the application is launching Outlook in the background to populate the pane(s).
  - **Workaround:** Open Outlook before you launch Dashboard, or remove the Outlook pane(s) from your Dashboard Home page.
- ◆ Watcher service will not start until at least one file is added via the Add Files screen in Document.
  - **Explanation:** The system does not create a storage folder for a client or other entity until the first file is added to that entity.
  - **Workaround:** Add at least one file to the client or entity using the Add Files screen or Copy/Move a file from another client or entity.
- ◆ When Extended Storage is turned off, you can still view files in extended storage folders and Business Unit profiles still show Extended Storage folder templates and folder preview.
  - **Explanation:** Files can still be seen, but only if the firm had Extended Storage enabled, then added some files to extended storage and then turned off Extended Storage. This should rarely happen as most firms will keep Extended Storage enabled at all times.
  - **Workaround:** Firms not wishing to use Extended Storage should turn the feature off (Dashboard -> Configuration -> Document Settings and Defaults -> Configurations) before adding any files to the system.
- ◆ When editing a storage location from the Office Profile screen, the user can exit the screen without saving changes.
  - **Workaround:** To save changes, click the Apply button.

- ◆ When a firm is licensed for the standalone SaaS Portal and then it purchases Document On-Premise, various licensing and other errors will occur if the firm has not run the Portal Conversion Utility.
  - **Explanation:** When Document is installed, it checks to see if Portal SaaS is also licensed. If it is, Document assumes the portal is "integrated" but before integration can be established, the firm must first run the Portal Conversion Utility. If you attempt to create a portal, publish to portal or any other Portal-related activity prior to running the Portal Conversion Utility, you will receive an error.
  - **Resolution:** Launch and run the Portal Conversion Utility. (Dashboard -> Applications -> Run utilities -> Document Tools -> Portal Conversion.
  
- ◆ Sometimes when a screen that is not maximized is closed by the user, and then the user tries to re-open the window it flashes and remains minimized/hidden. Users must right-click on the item in the task bar, and choose to Maximize the window. It will then open up maximized and performs as intended.
  - **Workaround:** If the screen was maximized in the prior session when it was closed then it will reopen without any issues.
  
- ◆ Adobe PDF files are not indexed automatically.
  - **Explanation:** In the past, Adobe has offered a free 32-bit iFilter to index PDF files. Document now requires a 64-bit server and the free iFilter provided by Adobe does not work with Windows Server 2008 64-bit. Without the iFilter, Document is unable to index PDFs.
  - **Workaround:** There are other PDF iFilters available from various vendors. One vendor we have tested with is Foxit (<http://www.foxitsoftware.com/shopping/products.php?product=Foxit-PDF-iFilter>.) We have tested Foxit's iFilter and it works well with Document. Alternately, you may be able to work with Adobe for a workaround for their free iFilter.
  
- ◆ Install/Update Manager client does not display a message when the Microsoft Office Plug-in Framework does not install. The framework is not installed if Office is not installed on the machine.
  - **Explanation:** If Office is not installed or other Plug-in Framework prerequisites are not already installed, the system will not install the Plug-in Framework. No error is displayed to let the user know that a prerequisite has not been installed. No error is displayed to let the user know that the Plug-in Framework was not installed.
  
- ◆ The Routing Queue displays an error when you attempt to append a PDF file to a previously routed PDF file.
  - **Explanation:** When scanning files, if you scan a file with a routing slip that has already been used, it will not route the file. You can select an option to "Append New to Existing" to combine the two PDFs. This currently results in the following error: *Error: Cannot handle irefstreams. The current implementation of PDFsharp cannot handle this PDF feature introduced with Acrobat 6.*
  - **Workaround:** Instead of saving the second file to a folder watched by the Routing Queue, save the file to your local hard drive using the same name as the file stored in Document. Next, select the Add files button in Document and select the client, folder and other metadata to match the file already in Document. The Duplicate Filename dialog will be displayed. Select the "Append New to Existing" in the dropdown and click OK.
  
- ◆ If the Routing Queue is started before logging into Document or the SmartClient, it may not pick up and route files.
  - **Explanation:** If you create a routing slip and then scan a file to a watched folder, it may sit in the routing queue indefinitely if you do not log into Document prior to launching the routing queue.
  - **Workaround:** Launch the Dashboard or Document prior to launching the routing queue. It should then properly pick up and route files.

- ◆ For some users, when you launch the dashboard the first time it may take a few minutes to load.
  - **Explanation:** Occasionally when launching the Dashboard, the SmartClient may not be able to reach the server immediately. This rarely happens, but could occasionally occur.
  - **Workaround:** Wait a few minutes for it to attempt to reconnect or kill the process and re-launch the Dashboard.
- ◆ 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.
  - **Workaround:** Stop and restart the watcher service on the server. It will then pick up the new office or changes to the existing office and will watch the specified folders.