Release Bulletin

ProSystem *fx* Document

Welcome to ProSystem *fx* Document 2013-1.0

This bulletin provides important information about the 2013-1.0 release of ProSystem *fx* Document. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 6. Additional information is available on CCH Support Online.

Usability Improvements

"20xx and Prior" Folder

Firms who have many years' worth of data or who migrated from Foundation Document have asked for the ability to hide the older year folders so that they do not take up so much room in the left navigation bar in Document. Now, your firm can select a "cut-off year" and Document will put that year and any older year folders in a "20xx and Prior" folder. You can easily change the cut-off year at any time. As the years pass, you can update the folder to hold more year folders.

Drag and Drop to the Desktop and Windows Explorer

You can now drag files from Document file lists and drop them on the Windows desktop or in Windows Explorer. You must have permission to download the file to use this feature.

Drafts Folder Organization

Previously, having several files checked out simultaneously made it difficult to determine which file belonged to a particular client. Now, when you check-out or direct edit a file, Document will create a folder for each client in the following location: My Documents > Drafts > {Client name} > {Template}. You should now be able to easily identify which files belong to a particular client, as well as the folder location of a file when viewed in Document. Files belonging to File Groups are also saved in a folder representing the File Group.

Configure the Number of Search Results

Prior to this release, search results have been limited to 200 results. You now have the ability to set (at the firm level) the number of search results to be returned.

Note: Depending on the performance of your hardware, raising this limit may introduce performance degradation. If so, please lower the number of results to improve performance.

Create Client Storage When Client Created Outside of Client Manager

When you create clients through the Client Manager, the Managed, Extended and Archived storage areas are setup automatically. We have extended this functionality to include any entity created using any of the following methods: through the Data Migration Utility, Client Import Utility, Staff Import Utility, when using Tax integration's "create client on-the-fly" feature to create a new return or when splitting a joint return, or from the client lookup in Practice. For clients, the Extended Storage area is created allowing you to immediately add files through Windows Explorer without having to first add a file through the Document interface.

Third Party Software Compatibility and Integration

Drag and Drop from Document to an Outlook Email Being Composed

You can now drag and drop files from Document file lists to an Outlook email being composed. This quickly attaches the file to the email without using Document encryption. You must have permission to download the file to use this feature.

Office 2013 and Office 365 Compatibility

Document and the Document plug-ins to Microsoft Office now support 32-bit versions of Office 2013 and Office 365. To use Office 365, the Office applications must be installed on the user's workstation in order for the Office Plug-ins to be registered and enabled. Web apps and Streaming apps are not supported.

Note: There is a known issue that prevents users from previewing files in Document when using Office 365. This issue will be addressed in a future release.

Open Excel Workbooks in a New Instance of Excel

A new user option allows you to specify how you would like to handle direct editing or checking out and opening Excel workbooks. You can select to always open in a new instance, always open in the same instance, or prompt to open in a new instance or the current instance.

Note: When using Office 2013 and Office 365, Excel always opens new files in a new instance, regardless of your setting.

SQL Server 2012 Compatibility (SQL 2008 Compatibility Mode) - End of Life Support for SQL 2005

ProSystem *fx* Document now supports SQL Server 2012 running in SQL 2008 compatibility mode.

With this release, ProSystem *fx* Document no longer supports SQL Server 2005.

Note: If your firm is still using SQL Server 2005, you will be unable to upgrade to this version until you have upgraded your database to SQL 2008 or SQL 2012 running in SQL 2008 compatibility mode. Please contact Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 6 for upgrade assistance.

Watcher Service Improvements

The Document Watcher Service has been re-architected and redesigned to improve performance and stability, especially for larger firms or firms with a high volume of extended storage activity.

New Document Watcher Service Configuration Screen

This new configuration screen will provide firms with a single screen to view all Watcher Service activity. You can view a list of watcher services across offices, including their status (Running, Idle or Stopped). You can also view and edit the watched file types for each office. You can also access the Watcher Queue and Watcher Logs from this screen.

Separate Watcher Instances for up to 10 File Types

The Watcher can now run up to ten separate watcher instances in each office - one for each file type to be watched. Each instance only looks for a single file type and it adds new files to the watcher queue to be indexed.

Note: To prevent overburdening the system with too many watcher instances, if more than 10 file types are configured for any office, then only one instance will be used to watch all file types in that office. This may reduce overall performance of the Watcher Service.

New Watcher Queue and Indexing Service

The Watcher Queue is a list of files waiting to be indexed and added to Document. The various separate watcher instances add files to the queue. A link to view the watcher queue from the Document Watcher Service configuration screen will allow you to view a snapshot of files that are in the queue to be indexed. The indexing service for each office adds files to the watcher queue. The Indexing Service picks up files from the queue, indexes and adds them to Document. When the Watcher Queue is empty, the Indexing Service reports its status as *Idle*. This provides firms an easy way to know if there are any files still to be indexed or if all files have already been indexed.

Document Watcher Log Configuration

You can now configure how often new watcher log configuration files are generated based either by the size of the log file or based on a predefined timeframe (daily, weekly or monthly). You can also set the maximum number of log files to retain.

Configuration Sync

To improve performance, the Watcher will check for changes to log configuration, disallowed file types and changes to watched file types only once every thirty minutes. The service can be restarted if an immediate sync is required.

Firm Administration

Update Spouse Name Format to be the same as the Client Name Format

When you update the format for Client Name, the Spouse Name format will also be updated to match.

Delete Client Associates

You now have the ability to delete Client Associates you no longer need.

Updated State and Country Code List

The state and country code lists have been updated.

Single and Batch Client Linking

Single and batch client linking now has an option for exact matching based on Federal ID.

Dashboard

Auto-arrange for Applications and Configurations Screens

The Applications and Configurations screens in Dashboard are now auto-arranged based on the size of your monitor or window to reduce unnecessary scrolling.

Increased Number of Recent Tasks

The Recent Tasks list in Dashboard now displays up to 5 recent tasks.

Dashboard Help

Added Dashboard Help links.

Install/Update Manager

OP Diagnostics Utility

The new utility helps identify and resolve many commonly reported issues during the server upgrade process. It checks for running services, valid credentials, IIS, and connectivity. Stopped Services and IIS issues will be resolved automatically by the utility. For administrator credential issues, it will prompt the user for new credentials. This utility can be launched separately once you have updated your central server to the 2013-1.0 release. The diagnostic utility will automatically run before every update for all future releases.

Distributed Repositories for Local Office Workstation Upgrades

Currently, when firms with multiple physical offices upgrade, all workstations connect to the Central Office Server to download the updates to the Smart Client. This release lays the groundwork which will allow each Remote Office Server to download the upgrade to its own repository. Then, workstations in that physical office can download the upgrade from their local server, instead of over the WAN to the Central Office.

Note: Once the central and remote office servers are updated to 2013-1.0, you will be able to configure local repositories for remote offices. All new workstation installations will download the Smart Client installation from this local repository once configured.

Windows Server 2008 Loopback Address is No Longer Required

In a previous release, some firms were instructed to modify their HOSTS file entries on the Central Server to improve performance. This issue has been resolved and the loopback address is no longer required.

Change Central Repository Location

Firms can now move the central repository location through the Install and Update Manager, if necessary. The Install and Update Manager will automatically transfer the installation media from the existing repository location to the new repository location, after validating the new repository location.

Note: If the firm has remote office servers and the repository location on the central server is changed, the firm will need to launch the remote office Install and Update Manager server once for the change to be complete. This also completes the maintenance window.

Windows Server 2003 Log-on as a Batch Access Right

As part of the 2013-1.0 Install and Update Manager Server update, a dedicated application pool identity will be created for the service level user. This fix resolves the issue for future releases.

SHA2 Certificate

In 2013-1.0, CCH servers will be using SHA2-level data encryption. As a result of this change on our servers, a few Windows 2003 servers may not be able to download the On-Premise Welcome Package from CCH Servers. If this issue is encountered, you can install a hotfix that has been published by Microsoft from this location: http://support.microsoft.com/kb/968730.

Note: This hotfix must be installed ONLY if you encounter download problems from CCH servers.

.NET 4.5 Framework Installed

If not already present prior to install, .NET 4.5 Framework will be installed automatically.