

# CCH ProSystem *fx* Document

## Welcome to CCH ProSystem *fx* Document Release 2015-5.0

This bulletin provides important information about the 2015-5.0 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

**Note:** As with all Document releases, so that we can ensure the best possible upgrade experience, all firms are required to contact CCH Support to schedule your Document installation where one of our experienced Support Representatives will assist with the server upgrade(s) and at least one workstation upgrade.

## New in this Release

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### Add Files Screen Retains File Properties (Metadata) When Changing Entities

When adding groups of similar files for multiple clients, the Add Files screen now retains the file properties or metadata you've selected even when you switch clients or entities, unless that property value is not valid or available for the newly-selected entity.

- The following metadata fields are retained when changing entities: Storage Folder, Class, Subclass, Document type, Year, Sensitivity Level, Keywords, Permanent, Archive, Show Extended files in Document, Publish to Portal, Portal Edit Mode, and Portal Storage Folder.
- If the class/subclass or sensitivity level is not available for the newly selected entity, those fields will be cleared and you will be required to select from the available values for the selected entity.
- Default metadata for a selected folder will override the retained metadata.
- The Storage Folder and Portal Storage Folder are retained only if both entities have the same folder templates, otherwise the storage folder will reset to "Root" by default, but you can select a different folder.
- Changing Entity Types (client, staff, office, etc.) or closing the Add Files screen will both result in clearing the metadata.

### New File Retention Calculation Method: Based on Upload Date instead of "Year"

Document's file retention has historically been calculated based on the retention assigned to the class or subclass in conjunction with the assigned "Year" (metadata) and the upload month and day.

A new option has been added allowing the default firm administrator to configure Document's file retention to be based on the Upload Date without regard to the "Year" metadata field. When configured in this way, the expiration date for newly-added files will be calculated by taking the date the file was uploaded and adding the retention period associated with the class/subclass assigned to the file. For example, a file uploaded on January 16, 2017 assigned to a class with a 7-year retention, would expire on January 16, 2024 - seven years after it was uploaded.

**Note:** When changing your firm's file retention calculation method, you can apply the change to both new and existing files moving forward or you can apply the change to only new files moving forward. Either way, be sure to update your firm's written records retention policy and make note of the change in policy.

### **Adobe® Acrobat® DC (Document Cloud) Compatibility**

The Document plug-in for Adobe® Acrobat® now supports the desktop version of Adobe® Acrobat® DC (Document Cloud). Acrobat 9 and 10 are no longer supported, but may continue to work.

### **Fixed in this Release**

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The following have been fixed in this release of Document:

- Document Advanced Search produced a blank error message when searching by Project ID. This field is related to integration with CCH Access Workstream, so the Project ID criteria option has been removed from the Advanced Search screen. (23212)
- After changing an entity's assigned office, the Watcher Service did not watch the new location. (153375)
- After renaming an office, attempting to rename an entity in that office would fail. (153378)
- An "Unexpected error occurred in the database server" message was displaying when user view the File Activity Archive report. (156729)
- In the Integrated Portal, firm administrators were unable to remove inactive users from Portals when removing all staff. (155014)
- When using the Office plug-ins to open a client-uploaded file that was pending approval, the user was prompted to open a read-only copy of the file, but the status of the file was shown as blank. (88726)