

CCH[®] ProSystem fx[®] Document

Welcome to CCH ProSystem fx Document Release 2014-3.5

This bulletin provides important information about the 2014-3.5 release of CCH 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](#).

New in this Release

Entity ID Added to Entity Tree in Document Central

A new user option now allows you to configure how entities display in the Document Central navigation pane. You can choose to show the Client ID/Entity ID in addition to the Client/Entity Name. Options include showing the Sort Name only (previous functionality), Sort Name + ID (new default option), ID + Sort Name, or ID only.

Rename Extended Storage Folders When Client Sort Name Change Occurs

When a client's sort name is changed, Document will now update the client's Extended Storage folder name accordingly.

Note: The sort name does not update automatically when you change the client's name. Due to differences in how firms sort their clients, the sort name field must be manually updated when a client's name changes.

Drag and Drop - Highlight Drop Folder

When dragging a file over a folder in Document Central, the folder in focus will now be highlighted to indicate that files will be placed there when you release the mouse button. You no longer have to guess if you are dropping a file on the correct folder.

Windows Server 2012 Compatibility - New and Migrating Firms Only

Document now supports Windows Server 2012 / 2012 R2 for new firms installing Document for the first time. For firms using Windows Server 2003 or 2008 who wish to upgrade to Windows Server 2012, we will provide upgrade capabilities in a future release. With Windows Server 2012 compatibility comes a new word search indexing technology, SQL Full Text Searching, which is required to continue using word search capabilities.

SQL Full Text Searching (SQL FTS)

Windows Server 2012 no longer supports the Microsoft Indexing Service, which was previously used to index files as they were added to Document. This feature allowed file contents to be searched in Document. Document will now use SQL FTS for indexing and searching the contents of files. This change also provides more accurate search results, greater stability, and improved scalability.

Note: Due to a limitation in SQL Server, you can only perform "Starts With" word searches. You will no longer be able to perform "Contains" word searches, nor use Wildcards at the start of a word search (for example, *tax). SQL FTS also allows for future enhancements to word searching in Document that will compensate for this limitation. These future enhancements could include proximity searching, synonyms, weighted terms, and results ranking, among others.

Adobe PDF Indexing Using the Free Adobe IFilter or Foxit PDF IFilter

Adobe IFilter v. 9.0 is included with this version of Document and provides single-threaded indexing for PDF files uploaded to Document. The Foxit PDF IFilter is still supported and recommended for firms with a high volume of PDFs since it supports multi-threading. Multi-threading allows for faster indexing and higher throughput. Foxit PDF IFilter must be purchased separately.

Microsoft[®] Office and Adobe[®] Acrobat Plug-in Credential Security

Office Plug-in credentials are now stored using stronger encryption to better protect data stored in Document. As an added level of security, you must now opt in to have your login password saved. The first time you open Microsoft Office applications or Adobe Acrobat after upgrading, you will be

prompted to enter your login credentials. If you select the new Remember Password check box, you will not have to enter your credentials every time you use the plug-ins.

Technical Corrections in this Release

File Remained Checked Out When Excel was Closed If the File was Opened from Excel Plug-in

Customers reported that if an Excel file was opened from the plug-in, and then Excel was closed, the file did not check in. With this release, Excel files opened from the plug-in successfully check in upon closing Excel and the file.

File Properties No Longer Showed the Closed Workstream Project after Changing Subclass on a File

Customers reported that if a file was linked to a closed Workstream project, and then the subclass for the file was changed, the Workstream project no longer displayed in File Properties. With this release, the Workstream project continues to display after changing the subclass.

When Publishing to Portal, You Can Now Add Multiple Paragraphs to Comments

You can now press Enter to start a new paragraph while entering comments for a file you are publishing to Portal from Document.

Error Received When Deleting a Class

Customers reported receiving "An error occurred while performing FileClass delete" message when deleting a class, even though no files were associated with the class. This issue is resolved in this release.

Folder Template Could Not Be Organized If the Cut-Off Year Was Changed to an Earlier Year

Customers reported that they were unable to rearrange the folders in a folder template, if the cut-off year was changed to an earlier year. This fix will prevent this issue from happening in the future. However, if current folder templates are already affected, please contact Customer Support for assistance in reordering the folders.

After Installing the Latest Version of the Office Plug-ins, the Program Shows an Updated Version Available in User Options

With this release, the Update option will no longer display when you are using the latest version of the plug-ins.

Portal Conversion Utility Rollback Failures

An error that prevented failed Portal Conversions from rolling back properly has been resolved.

Extended Area Files Stored in Custom Folders Disappeared

A rare issue with custom folders created inside a Folder Template in extended storage has been resolved. Previously, deleting one client's custom folder caused files stored in custom folders for all clients using that same folder template to no longer display in Document. With this release, deleting one client's folder does not affect the ability to view other clients' files.

Moving a Custom Folder into Another Custom Folder in Extended Storage Results in Files Disappearing from Document

When a client's custom folder was moved into a different custom folder, Document recognized the folder move, but did not display any files inside the moved folder. With this release, the folder and files both display as expected.

Scheduled File Exports Not Running According to Their Schedule

File exports were not running according to schedule when an end date was selected. Also, if no end date was selected, the system automatically added the following day's date, which prevented the scheduled export from running. Both of these issues have been resolved in this release.

Improved Service-to-Service Communications

Communications between Document and Portal have been improved when the two modules are integrated. These changes will limit errors in Document that can result when Document cannot reach a Portal server.