ProSystem *fx*® Document (SaaS) and Portal

Release Bulletin

Release 2010-5.0

November 2011

ProSystem *fx* Document (SaaS) & Portal Release Bulletin

This bulletin provides important information about the release of ProSystem *fx* Document (SaaS) and Portal. Please review this bulletin carefully prior to installation. If you have any questions, please call Customer Support at **1-800-PFX-9998, option 8** or contact your assigned support representative.

November 15, 2011, we will be releasing the Document (SaaS) and Portal 2010-5.0 update to production.

This bulletin provides important information you need to know about the pending 2010-5.0 update release for Document (SaaS) and Portal. Please review this bulletin carefully.

The following is a summary of topics covered in this release bulletin:

♦ Document (SaaS) 2010-5.0
♦ Portal 2010-5.0

NEW IN THIS RELEASE

ProSystem *fx* Document (SaaS) Enhancements

The following is a list of the exciting enhancements driven by customer request and input from our entire organization. In addition to the enhancements below we also address dozens of customer reported needs with the 2010-5.0 release.

♦ **Add Feedback button to Document (SaaS)**
  o A new Feedback button allows you to send enhancement requests, defect reports, and feedback regarding features that you like or dislike directly to CCH product management and support.
♦ **File Export Utility**
  o The File Export utility will now be available in Document SaaS. This feature provides the ability to create a downloadable zip file containing all of the files for a selected client or groups of clients.
♦ **Delete Local Copy Option**
  o Users now have an option to delete the local copy of a file after uploading it to Document (SaaS).
♦ **Update "File list" tab based on user selection**
  o Allows users to quickly view all files for an entity
♦ **Link "Year" field to selected "Year" folder .**
♦ **Add files screen automatically preselects the entity and storage folder.**
♦ **Grid splitter between the left navigation pane and Document Central tabs has been widened so that it is easier to grab.**
♦ **Firm Administrators now have an option to enable or disable storing files at the root of an entity**.

- **Add Files - User Options for dragging and dropping .Zip files onto the Add Files Screen have been added**
  - Extract and upload each file individually
  - Prompt to choose an upload option
  - Upload the .zip file as a single file
- **Document Central – Status Indicator will display the user name instead of the User ID**
- **Document Central – Hovering over column headers displays column name as a tooltip**
- **When the user hovers over the column headers for Status, Published and Discussion, the title of the column will display as a tooltip**
- **Office Plugins - Recently accessed entities**
  - When a user selects Recent Entities as the Entity Type, the Recently Accessed Entities are displayed in the tree view
- **Tax Integration to Document - Tax File Naming Convention**
  - Added the ability to set default filename from Tax Mapping screen for Foundation Tax integration with Document
- **Search Enhancements:**
  - **New Search tab will be available in Document Central with search results**
  - **Quick Search - Firm option to disable full-text searching in Quick Search**
  - **Quick Search - option to perform a quick search of files for the selected client or entity without the need to manually select the client.**
  - **Allow Wildcard characters in search criteria**
    - User can run a search using wildcard characters and the system returns the appropriate search results
    - Applies to Quick Search and Advanced Search
  - **Search - Ability to narrow down search results when too many are displayed so that you can more quickly identify the file(s) you are looking for.**

ProSystem fx Portal Enhancements

The following is a list of the exciting enhancements driven by customer request and input from our entire organization. In addition to the enhancements below we also address dozens of customer reported needs with the 2010-5.0 release.
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- **Batch Print Organizers from Tax to Portal**
  - Batch Process Client organizers from Global *fx* and ProSystem *fx* Tax to Standalone Portal and Integrated Portal
- **Folder-level Retention**
  - Allow the file's retention / expiration date to be set at the folder level
- **File-level Retention**
  - Allow the expiration date to be set on a file-by-file basis
- **User Access Control - Allow Elevated Permissions Credentials allows an administrative user to enter his/her credentials to allow another user without permissions to batch print to Portal.**
- **Renamed "Portals" tab to "Recent Portals" to more closely reflect the behavior of the tab.**
- **File Context Menu - Added Folder Path option to the file context menu to quickly move a file which was uploaded to the wrong folder.**
- **Remove Client Area rows from Storage Details screen if firm is not licensed for Client Area.**
- **Show all assigned portals if there are 50 or fewer allows users to view a list of all of their portals without the need to add each to the list manually.**
- **Add the ability for firms to customize the default fonts for their Portal**
- **Ability to customize the look and feel of the portal including fonts, colors, and backgrounds so that it will have the same look and feel as the firm's website.**
- **Portal Reports - SA Portal**

- o **Portal Storage** – Displays a list of portals and the amount of storage used for each.
- o **Portal Approvers** – Displays a list of firm users who are Portal Approvers for each portal.
- o **File List** – Displays a list of all files stored for a selected portal including the file's location within the portal, the upload date, and the user who uploaded the file.
- o **Portal Administrators** – Displays a list of all portals and the email address for each Portal Administrator.
- o **Firm User Access** – Displays a list of portals and each firm user's access expiration date, grouped by Firm User name.
- o **Files Not Accessed** – Displays a list of files that have not been accessed by the client for a selected portal.
- o **Portal Usage** – Displays login information for each portal user of a selected portal including the last upload, last download and last login date.
- o **Portal List** – Displays a list of all portals created including the portal name, portal administrator's email address, active/inactive status, and date created.
- o **File Count** – Displays a list of all portals and the number of files stored in the collaboration and client areas of the portal.
- o **Portal Users - Never Logged In** – Displays a list of portal users who have never logged in to a selected portal or all portals.
- ♦ **Tax File Naming Convention**
  - o Adds the ability to set default filename for returns send from ProSystem *fx* Tax to Standalone Portal.
- ♦ **Integrated Portal EULA**
  - o Firms with Document (SaaS) and Integrated Portal can create, display and force acceptance of a client-facing End User License Agreement (EULA)