

# CCH® ProSystem fx® Workpaper Manager

## Welcome to Workpaper Manager 2023.2.1

This bulletin provides important information about the 2023.2.1 release of CCH® ProSystem fx® Workpaper Manager. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

**Important:** Information on installing Workpaper Manager is in the Knowledge Base article [Installation Guidance for CCH ProSystem fx Workpaper Manager](#) on CCH Support Online. Also, a *Deployment Planning Guide* is available in the Documents folder with the Install Media.

## Deployment Information

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### 2023.2.1 Provided on Software Delivery Manager

This Workpaper Manager 2023.2.1 release is only available through Software Delivery Manager and uses an MSI for upgrading your workstations. It will not be available to download directly from our Support site.

The following firms should install this 2023.2.1 release on all servers and workstations:

- Your firm has not previously installed a release of Workpaper Manager.
- Your firm is upgrading from a 2021, 2022, or prior 2023 release of Workpaper Manager to work with all features and resolved issues.

**Note:** For firms with an earlier version of 2023 already installed, there is no database upgrade when deploying this latest release. This allows for workstations to be upgraded separately from the server. A firm can work in a mixed environment if all machines have any 2023 release installed. We do, however, highly recommend that all workstations are updated with this release.

## New in this Release - Workpaper Manager

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### 2023 Tax Grouping Update

The 2023 tax grouping update includes the following:

- **CCH® ProSystem fx® Tax and CCH Axxess™ Tax.** For details, refer to these [tax line charts](#).
  - The Tax Grouping Update Wizard will update tax grouping lists to 2023 tax codes.
  - New 2023 tax grouping lists are available for Corporation, S Corporation, Partnership, Exempt, and Individual tax entity types.
- **Lacerte®.** For details, refer to these [tax line charts](#). New 2023 tax grouping lists are available for Corporation, S Corporation, Partnership, and Exempt tax entity types.
- **GoSystem® Tax.** For details, refer to these [tax line charts](#). New 2023 tax grouping lists are available for Corporation, S Corporation, Partnership, and Exempt tax entity type.

- **UltraTax CS®.** New 2023 tax grouping lists are available for Corporation, S Corporation, Partnership, Exempt, and Individual tax entity types.

#### **ProSystem fx Workpaper Manager Admin Views Utility**

The following enhancements are provided with this release:

- **Clients by Entity View.** Clients are now listed by entity in a new Clients by Entity folder of the Admin Views Utility.
- **Client Properties bulk edit of entity type.** The Client Properties Bulk Edit feature now includes the ability to bulk edit the entity type of clients.

### **Included from Prior 2023.1.1 Release**

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This 2023.2.1 release includes all updates from prior 2023 releases of CCH ProSystem fx Workpaper Manager. A link to the release notes from each of those 2023 prior releases can be found on the Guides tab of our [product page](#).

### **Supported Technologies**

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#### **Supported technologies:**

- Microsoft® Windows® 11
- Microsoft® SQL 2022
- Microsoft® Server® 2022
- Adobe® Acrobat® Standard and Professional 64-bit

### **Recommended Best Practices from Our Support Team**

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Following are some best practices recommended by our Support team:

- Create scheduled tasks for backing up your databases and managing central bins.
- When rolling out new computers, deploy 64-bit SQL.
- For your Microsoft® Office 365™ subscription, we recommend the semi-annual channel or manually scheduled updates.
- Before upgrading your operating system, please refer to this [Knowledge Base article](#).
- Workpaper Manager may not work as expected if there is insufficient drive space when upgrading Microsoft® Windows® 10. The application may require a repair to address component errors after deploying major version updates.

### **Other Information**

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Information on technical and application-specific considerations in the following Knowledge Base articles on CCH Support Online:

- [Technical Considerations for CCH ProSystem fx Workpaper Manager](#)
- [Application-Specific Considerations for CCH ProSystem fx Workpaper Manager](#)

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