CCH® ProSystem *fx*® Workpaper Manager

Welcome to Workpaper Manager v2018.3.1

This bulletin provides important information about the v2018.3.1 release of Workpaper Manager. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

Note: There are two guides that provide important information relating to the installation and deployment of Workpaper Manager v2018.3.1. These are the *Installation Guide* and the *Deployment Planning Guide* found in the Documents folder with the Install Media.

How to Deploy - For IT Administrators and Third-Party IT Providers

1. Close Workpaper Manager before running the installation files.

2. Close all Microsoft® Office applications, such as Word, Excel® and Outlook®.

3. Download the installation file using Software Delivery Manager.

4. Install the SQL instance.

   - **Notes:**

      ▪ The SQL instance is not required for a Terminal Server Client installation. Click to see steps for installing to a Terminal or Citrix server.

      ▪ SQL 2016 and SQL 2017 installations should be run locally rather than from the network.

5. Install Workpaper Manager.

   - **Note:** You can confirm the Workpaper Management, Trial Balance and TGUW version numbers by reviewing the following registry key: <computer>\HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\ProFxENGAGEMENT30\Common

For further information see "How do I install CCH ProSystem fx Workpaper Manager?" on CCH Support Online.

New in this Release

2019 Tax Grouping Update
The 2019 Tax Grouping Update includes the following:

- **CCH® ProSystem _fx_® Tax and CCH Axcess™ Tax**. For details, refer to these tax line charts.

    – The Tax Grouping Update Wizard will update tax grouping lists to 2019 tax codes.

    – New 2019 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 2019 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 2019 tax grouping lists are available for Corporation, S Corporation, Partnership, and Exempt tax entity types.

- **UltraTax CS®**. New 2019 tax grouping lists are available for Corporation, S Corporation, Partnership, Exempt, and Individual tax entity types.

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