

CCH® ProSystem fx® Workpaper Manager

Welcome to Workpaper Manager 2022.2.1

This bulletin provides important information about the 2022.2.1 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

2022.2.1 Provided on Software Delivery Manager

This Workpaper Manager 2022.2.1 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 2022.2.1 release on all servers and workstations:

- Your firm has not previously installed a release of Workpaper Manager.
- Your firm is upgrading from a 2020, 2021, or prior 2022 release of Workpaper Manager to work with all features and resolved issues.

Important: The 2022 releases of Workpaper Manager require all staff to log on with a password. After installing a 2022 release, staff who do not currently use a password will be prompted to set up a password the first time they attempt to log on. For staff who set up a password in a release prior to 2022 that includes upper and lower-case letters, the staff will be required to enter the case sensitive password or choose to reset it. The user's work email must exist in their staff profile to reset the password. Prior to upgrading to a 2022 release, be sure that a work email is set up in the **Default Admin** staff profile in case that user's password needs to be reset. If there are other staff where their work email has not been set up, the Default Admin or any Admin staff group user can enter the work email in the staff

Note: For firms with an earlier version of 2022 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 2022 release installed. We do, however, highly recommend that all workstations are updated with this release.

New in this Release - Workpaper Manager

2022 Tax Grouping Update

The 2022 tax grouping update includes the following:

- **CCH® ProSystem fx® Tax and CCH Access™ Tax.** For details, refer to these [tax line charts](#).
 - The Tax Grouping Update Wizard will update tax grouping lists to 2022 tax codes.

- New 2022 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 2022 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 2022 tax grouping lists are available for Corporation, S Corporation, Partnership, and Exempt tax entity type.
- **UltraTax CS®**. New 2022 tax grouping lists are available for Corporation, S Corporation, Partnership, Exempt, and Individual tax entity types

New APIs

The following new APIs are provided with this release:

- **Assign account to a fund based on fund mask**. The API for adding or editing accounts is updated to allow for assigning an account to a fund based on fund mask settings as defined for the trial balance in Workpaper Manager.
- **Assign account to a specified fund**. A new API that allows for assigning an account to a specified fund.
- **Change assigned staff and/or teams for finalized binders**. The staff and/or teams assigned for a finalized binder can now be updated.
- **Provide LFR or CFR when getting clients or binders**. You can now get clients or get binders for a specified LFR or CFR.

Included from Prior 2022.1.1 Release

This 2022.2.1 release includes all updates from the prior 2022.1.1 release of CCH ProSystem fx Workpaper Manager. The list of items from that prior release can be found in [CCH ProSystem fx Workpaper Manager 2022.1.1 Release Notes](#) as provided on the Guides tab of our [product page](#).

Supported Technologies

Supported technologies:

- Microsoft® Windows® 11
- Microsoft® Server® 2022
- Microsoft® Office 2021
- Intuit® QuickBooks® 2022
- Adobe® Acrobat® DC 2022 (Only 32-bit releases)

Unsupported technologies:

- Microsoft® SQL Server® 2014 support will end November 2022
- 32-bit operating systems

Recommended Best Practices from Our Support Team

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

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](#)

CCH Software News Delivers Valuable Product Information via Email

CCH Software News delivers technical bulletins, tax and technical discussions, and product update information directly to your email. Subscribing to CCH Software News ensures that you are kept abreast of pertinent issues which affect your CCH ProSystem *fx* products.

If you provided an email address with your order, you are already registered for CCH Software News. We encourage you to visit our [product page](#) and click on **CCH Software News Profile Setup** to review your CCH Software News profile and ensure that you are receiving information for all the CCH ProSystem *fx* products relevant to you.