

Release 2023.1.1
September 2023

CCH® ProSystem fx® Workpaper Manager

Welcome to Workpaper Manager

This bulletin provides important information about the 2023.1.1 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

2023.1.1 Provided on Software Delivery Manager

This Workpaper Manager 2023.1.1 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 2023.1.1 release on all servers and workstations:

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

New in this 2023.1.1 Release - Workpaper Manager

Workpaper Manager plugin for 64-bit Adobe® Acrobat® Standard and Professional

An Workpaper Manager plugin for 64-bit Adobe® Acrobat® Standard and Professional is available so that staff members can work with tickmarks and workpaper references in PDF documents. An Workpaper Manager plugin is not provided for 32-bit or 64-bit Adobe® Acrobat® Reader®.

- **Tickmark images replaced.** All Workpaper Manager provided tickmarks will be replaced with 24-bit depth image during installation. Any custom tickmarks should be recreated as a 24-bit depth image.
- **Security must be enabled.** Acrobat 64-bit now requires for security to be enabled. For more information refer to this [Knowledge Base](#) article.

Default Installation location is now Program Files (x86)

For a new installation of Workpaper Manager, the default installation location is Program Files (x86).

- **Improved Microsoft® Windows® user permissions.** The application now installs with improved end user permissions by removing modify/write access to folders not required for runtime.

Updated Amyuni document converter

The print driver for converting workpapers in the Workpaper Manager binder to PDF is updated to Amyuni Document Converter 650.

Bulk edit with Client Properties Admin View

The Client Properties report in the Admin Views Utility is updated to allow for bulk editing the client ID, name and/or name 2. The view can be filtered as needed and exported to CSV. The exported CSV can then be updated for any clients whose ID, name and/or name 2 should be edited. When the updated CSV is imported to the Client Properties view, the clients in the Workpaper Manager database are modified.

New APIs

The following new APIs are provided with this release:

- **Get list of team members.** A new API that allows for retrieving a list of staff assigned to a team.
- **Add or remove team members.** A new API that allows for adding or removing staff on a team.
- **Set temporary password for staff.** The staff API is updated so that a temporary password can be assigned for staff members.
- **Import IBAL and prior period balances.** The trial balance API is updated so that any balance supported with *Paste TB Import* can now be imported with the API. This includes current period Other Imported Balances (IBAL 1 thru 3) and prior period balances.

Resolved Issues

The following resolved issues are included in this release:

- **Workpaper name and index links** now correctly convert to static values when a workpaper is published.
- **Import Conversion Wizard** now successfully imports CCH ProSystem fx Trial Balance current and prior period balances for a quarterly binder.
- **Overwriting a previously exported account grouping list** is now working as expected.
- **iBinder API** now allows for unassigning a staff member even when that user is assigned to a staff group where the permission to change binder staff assignments is not granted.
- **Tax Regrouping Utility** now correctly regroupes UltraTax 2022 groups.

Supported Technologies

Supported technologies:

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

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](#)

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