

CCH® ProSystem fx® Workpaper Manager

Welcome to Workpaper Manager 2022.1.1

This bulletin provides important information about the 2022.1.1 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

2022.1.1 Provided on Software Delivery Manager

This Workpaper Manager 2022.1.1 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 2022.1.1 release on all servers and workstations:

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

New in this Release - Workpaper Manager

All staff are required to log in with a password

To better secure your data, all staff are now required to log in to the Workpaper Management and Admin applications with a password. As a result, the staff group permission for allowing staff to change their password is removed. Staff members who do not already have a password will be required to set up a password the first time they log in after this release is installed. Your firm can define the rules for passwords by choosing the *Tools > Firm Options* menu item in the Admin application.

New Client List Admin View

In the Admin application, the *File Rooms > Export Client List for CCH Access Portal* option is removed. To export a list of ProSystem fx Workpaper Manager clients for subsequent import using the *CCH Access Batch Client Linking* feature, we have added a new *Export Client List for CCH Access* report in the Admin Views Utility.

New APIs

The following new APIs are provided with this release:

- **Authentication for all Workpaper Manager staff.** For all previously provided and new APIs, all staff members assigned to a Staff Group in the Admin application are now able to authenticate for the APIs. The permissions assigned in the staff group are applied as the user works with each API. To retrieve or update binder data, the staff member must be assigned to the binder. If needed, an API is available for assigning and unassigning staff for binders.
- **Add and edit trial balance accounts.** A new API that allows for adding accounts or updating existing accounts for a trial balance. The account number, account description and current period unadjusted balance can be imported.

- **Assign accounts to groups or subgroups.** A new API for assigning existing accounts to existing groups or subgroups of non-tax or tax grouping lists.
- **Retrieve workpaper sign-off details.** A new API that allows for retrieving workpaper preparer and any level of reviewer sign-off data.
- **Roll forward a binder.** A new API that allows for rolling forward a binder including rolling forward CCH ProSystem fx Knowledge Coach workpapers.

Known Issues - Workpaper Manager

The following issues are resolved:

- The Winword.exe instance now closes as expected after upgrading to Microsoft® Office 64 Bit version 2203 build 16.0.15028.20178 or newer.
- Notes from deleted workpapers are no longer included in the Workpaper Manager Today dashboard count.
- A "System.OutOfMemoryException" no longer displays when synchronizing a binder or working in the Account Groupings window.
- A "Login synchronization failed. Execution Timeout Expired..." exception no longer displays when logging in to the Workpaper Management application.
- Workpaper Index and Workpaper Name links inserted in workpapers now display the index and name when the workpaper is published.
- Help content is updated to reflect the access keystrokes needed for adding preparer or reviewer workpaper sign-offs.

Supported Technologies

Supported technologies:

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

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 when 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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