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# Detailed Guide on Self-Upgrade to 2023.2.2

**IMPORTANT NOTE:** if you are in a version of 2021 and older, please contact our Support team for upgrades.

## Pre-Installation Checklist

Before beginning the installation, verify that all of the following tasks are completed:

**Note:** All machines running Engagement or Workpaper Manager in a network environment must be upgraded to the same version in order for users to access the software. It is not possible to run different versions of Engagement or Workpaper Manager within the same office.

- If you are upgrading Engagement or Workpaper Manager please do the following before continuing upgrade:
  - **Back up the central databases.** Back up all central admin and bin databases prior to upgrading.
    - For detailed instructions on using the backup restore utility, see [Database Backup and Restore](#).
  - **Back up the workpapers.** Back up all workpapers before upgrading.
    - To ensure that this backup contains the latest versions of all files, users should synchronize all binders to the Central File Room prior to the backup.
      - [How do I synchronize binders in CCH® ProSystem fx® Engagement or Workpaper Manager?](#)
      - In the case that the workstation is unable to go through the synchronization of all work prior to the server getting upgraded, prior to upgrading the workstation, have the user log into "Field Mode" to create Binder Packages of any binders that contain current work. If the workstation upgrade has any issues the current work can be restored from the binder packages into a new Local File Room.
      - Once users have synchronize their binders from the Local File Room to the Central File Room, use a file backup utility or copy/paste the Central File Room Workpapers folder to a backup location (C:\Pfx Engagement\Admin\Workpapers or C:\Program Files (x86)\Pfx Engagement\Admin\Workpapers).
  - **Back up templates.** Back up all centrally located templates prior to upgrading to allow for a full rollback if necessary.
  - **Upgrade the main office server first.** We recommend that you upgrade the main office server first, then upgrade the workstations in order of priority to begin using the software.

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- Close Adobe Acrobat, Microsoft Word, Excel, and Outlook.
  - We strongly recommend that you close any additional programs.
  - Disable virus-checking programs.
  - If you are installing on a computer that currently has another application using Microsoft® SQL Server®, stop that instance.
    - **Note:** Do not stop instances of SQL Server (PROFXENGAGEMENT).
  - If you install Engagement or Workpaper Manager to a server that is running Microsoft SQL Server 2014, 2016, 2017, 2019, or 2022 Enterprise or Standard Edition, we recommend that you use the SQL 2016, 2017, 2019, or 2022 Enterprise or Standard Edition installers instead of SQL Express installers. (Please refer to the system requirements documentation to also confirm that the Microsoft SQL Server installation is supported with your version of Engagement or Workpaper Manager). This will help to allow Engagement or Workpaper Manager to run optimally.
  - If you use the Standard or Enterprise Editions, you must do the following:
    - Configure a named instance for Engagement or Workpaper Manager prior to installation
      - [How do I create a new Microsoft® SQL Server® instance for CCH® ProSystem fx® Engagement or Workpaper Manager?](#)
    - If installing Microsoft SQL Server Standard or Enterprise make sure to have appropriate licensing on the Microsoft SQL Server machine.
  - Ensure that the operating system, Microsoft Internet Explorer, and Microsoft Office are all installed with the required service packs.
    - Ensure that a supported version of Microsoft Office installed.

Download the file from the website:

The screenshot shows a website header with navigation links: "CCH ProSystem fx®", "Audit Tools", "Practice Management Tools", "Product Support", and "Contact Us". Below the header, the text reads "CCH ProSystem fx Engagement Software Updates" and "Download the installer for the latest software below." Two download links are provided: "CCH ProSystem fx Engagement 2023.2.2 Installer" and "CCH ProSystem fx Engagement 2023.2.2 Detailed Guide on Self-Upgrade".

After downloading the file, it will be in your Downloads folder. You will see the zipped folder. Double-click on the zipped folder.

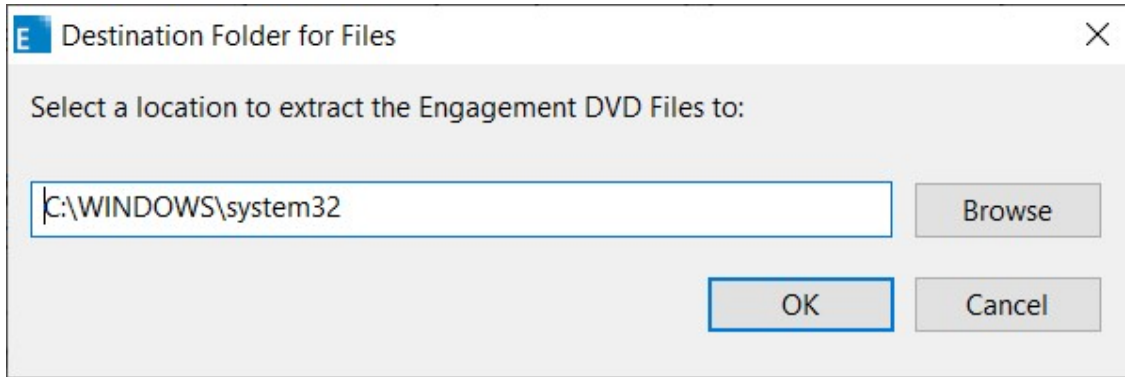
| Name                                     | Status | Date modified      | Type                | Size          |
|--|--------|--------------------|---------------------|---------------|
| cch_prosystem_fx_engagement_2023.2.2_dvd |        | 13-Sep-24 10:22 AM | Compressed (zipp... | 2,317,036 ... |

Double-click on the file. A password prompt will appear. Enter the password provided by Wolters Kluwer SEA.

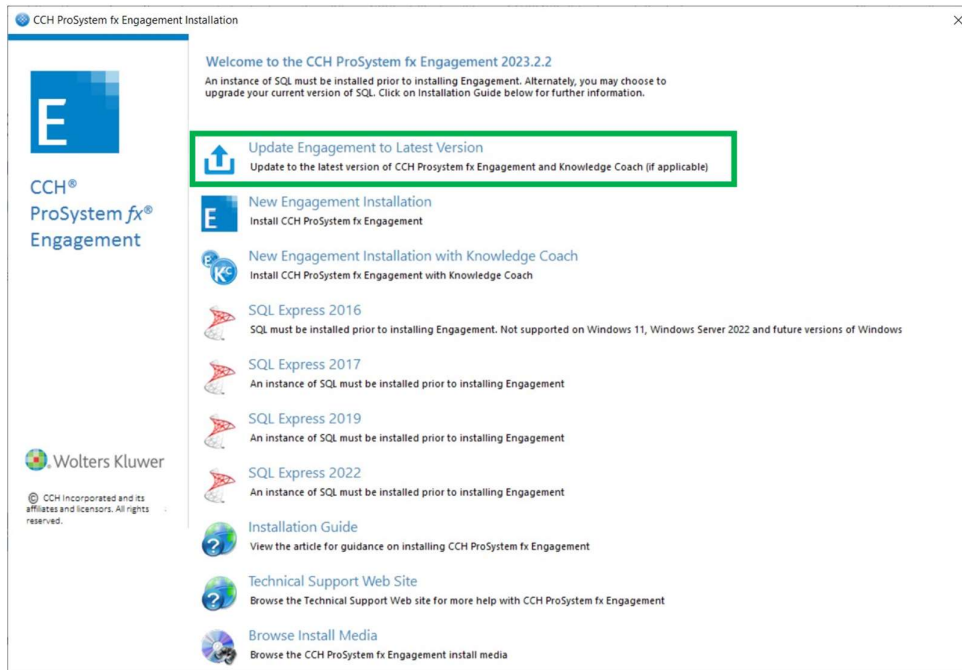
| Name                                     | Status | Date modified     | Type        | Size          |
|--|--------|-------------------|-------------|---------------|
| cch_prosystem_fx_engagement_2023.2.2_... |        | 13-Sep-24 9:45 AM | Application | 2,317,837 ... |

The dialog box titled "Password needed" contains a key icon and the text: "File 'cch\_prosystem\_fx\_engag...' is password protected. Please enter the password in the box below." Below the text is a text input field labeled "Password:" and three buttons: "OK", "Skip File", and "Cancel".

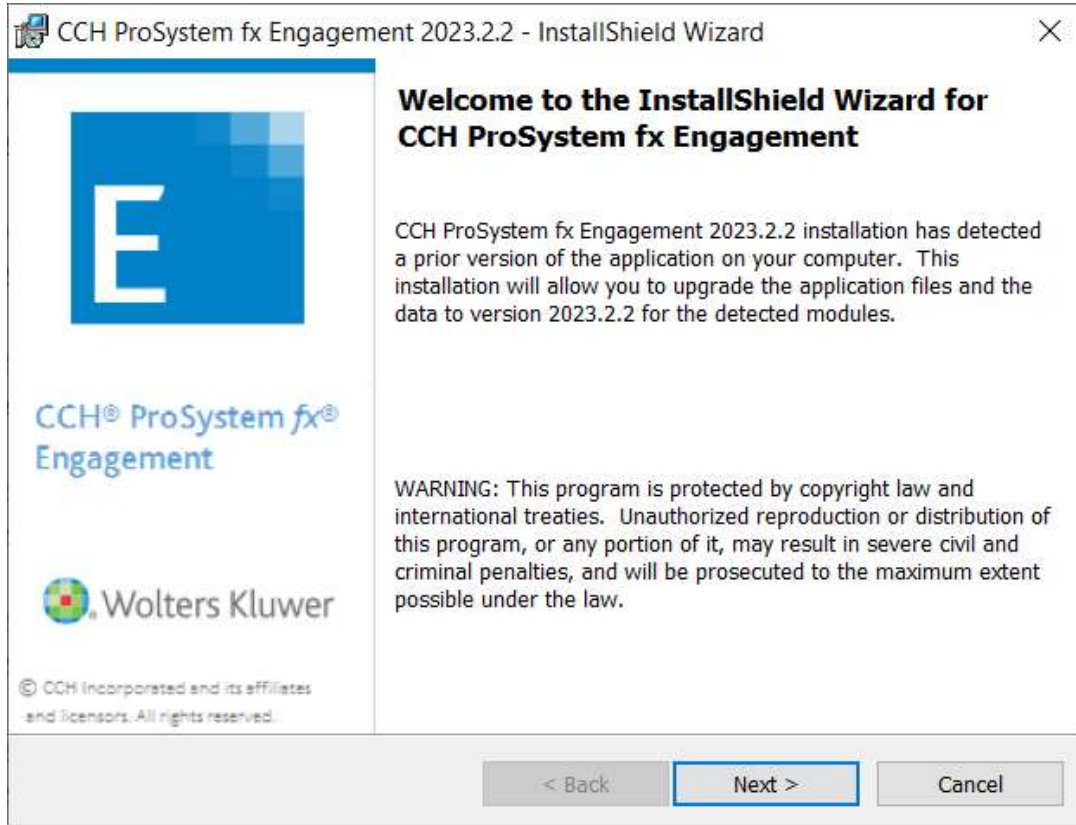
After entering the password, double click on the file. You will see the below prompt. Select the path you want to unzip the folder: You can unzip it in your Downloads folder.



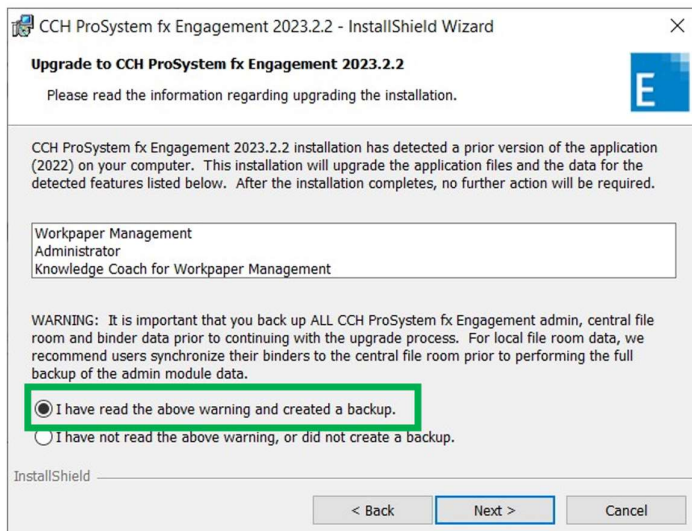
You will see this page, click *Update Engagement to Latest Version*



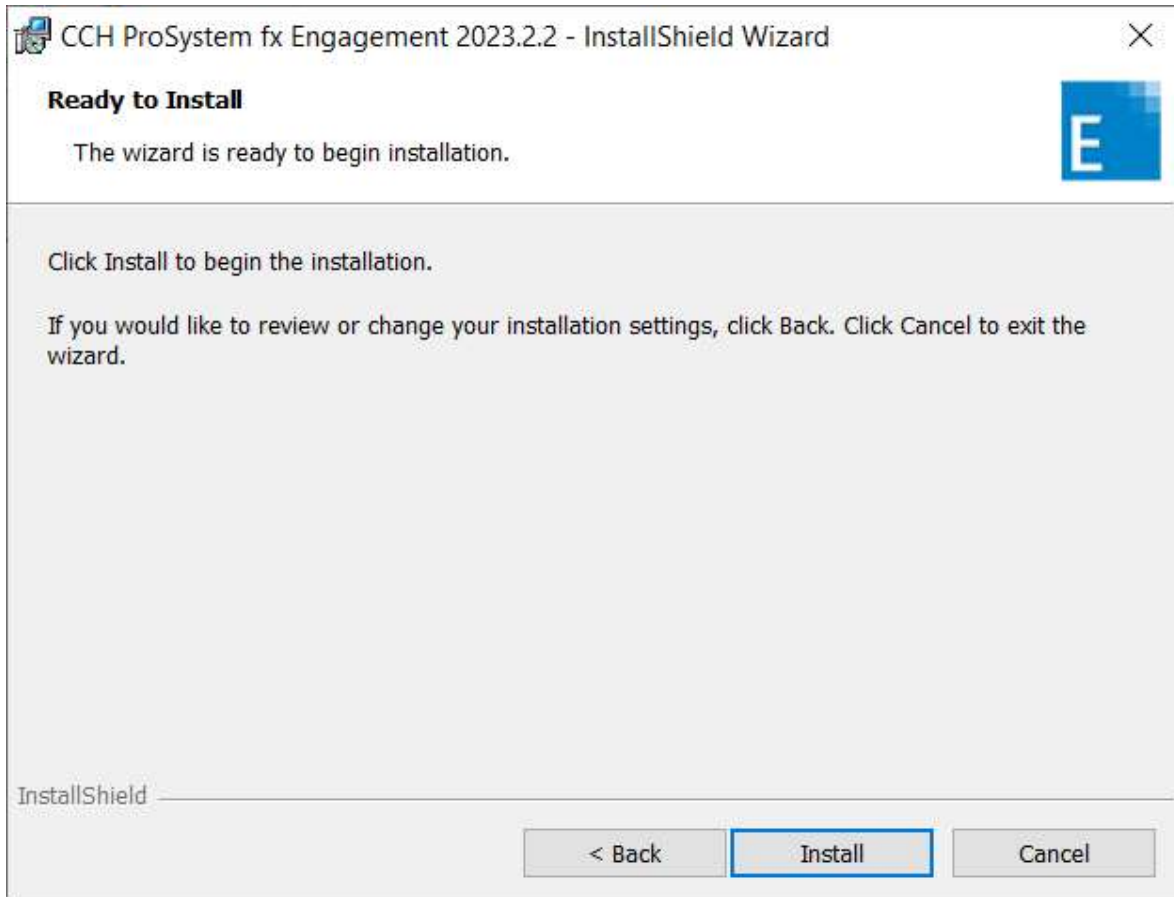
Press Next



After reading the items on the screen, select *I have read* the above warning and created a backup, click Next.

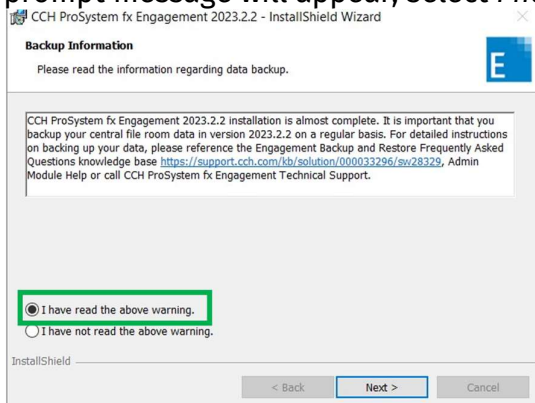


Click Install.

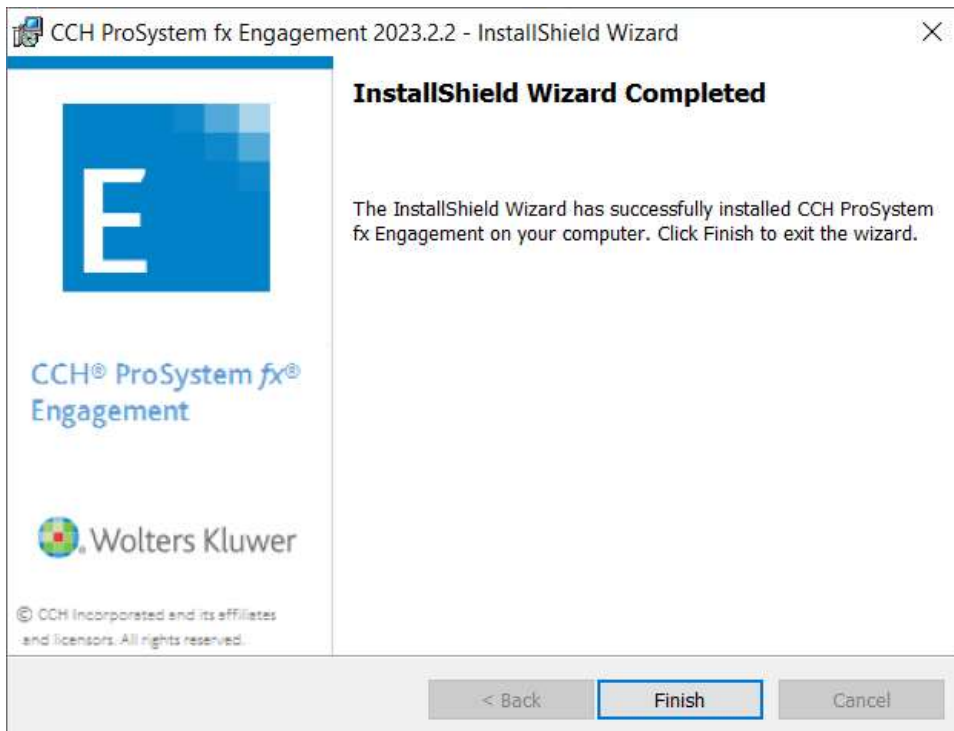
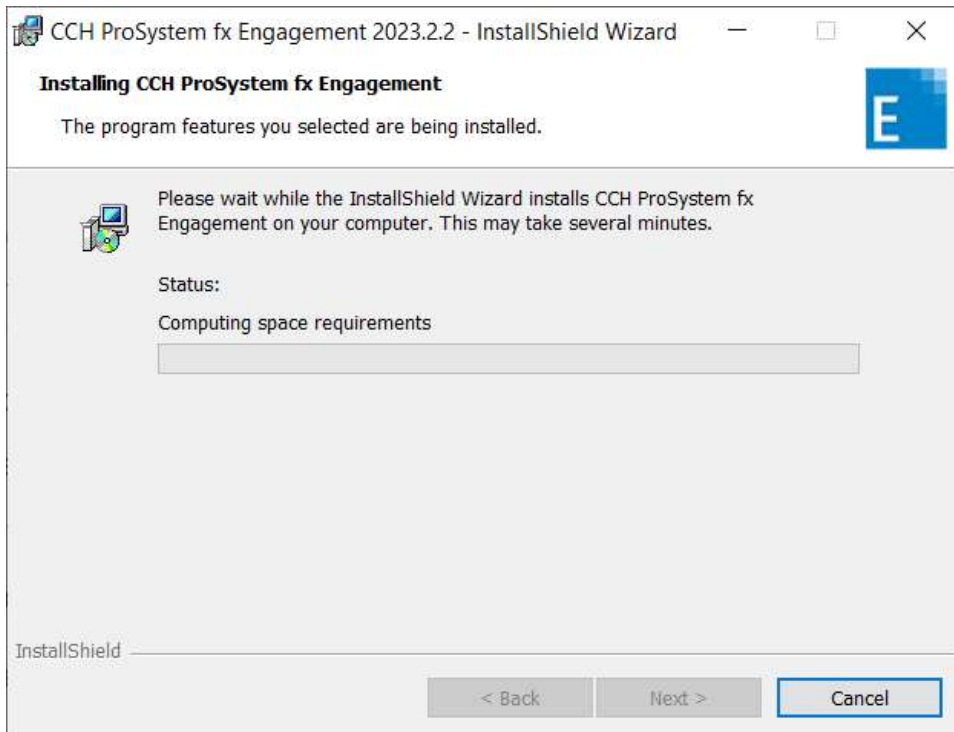


You will see the screen below.

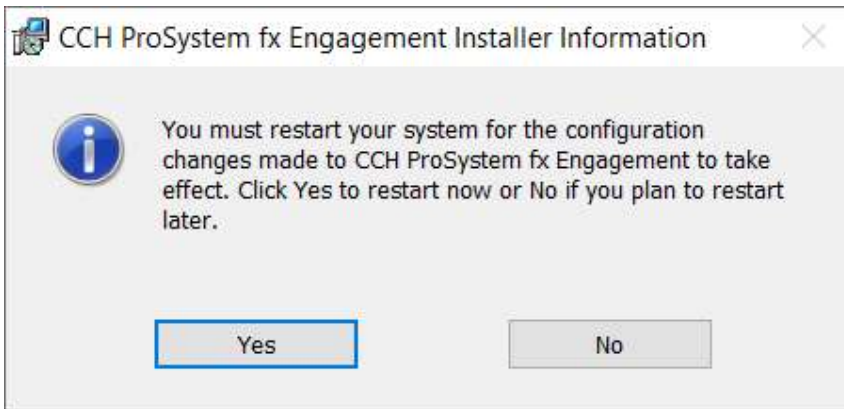
A prompt message will appear, select *I have read the above warning*. Click Next



Let the files load, you will see the next screen when it is completed. Click Finish.



Please restart your laptop after finish installation.



After restarting your laptop, open your Engagement module. You should see 2023.2.2 in your login page.

