June 2021

CCH Axcess™ Knowledge Coach

Welcome to CCH Axcess Knowledge Coach June 2021

This bulletin provides important information about the June 2021 release of Knowledge Coach. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New Content Available

Knowledge Coach Titles
- 2021 Knowledge Based Audits of Dealerships

- 2021 Knowledge Based Preparations of Dealerships

- 2021 Knowledge Based Compilations of Dealerships

- 2021 Knowledge Based Reviews of Dealerships

- 2021 Knowledge Based Audits of Common Interest Realty Associations

- 2021 Knowledge Based Preparations of Common Interest Realty Associations

- 2021 Knowledge Based Compilations of Common Interest Realty Associations

- 2021 Knowledge Based Reviews of Common Interest Realty Associations

AutoCheck Checklists
- 2021 Dealerships Financial Statement Disclosure Checklist

- 2021 Common Interest Realty Associations Financial Statement Disclosure Checklist

For more information on the changes in these titles, review the title release notes and title overviews for each on our Support site.

Getting Started with Knowledge Coach

Prerequisites
- CCH Axcess™ Install and update Manager must be installed. For help with the installation, review the knowledge base article How do I install CCH Axcess Install and Update Manager?

- Use Install and Update Manager to install CCH Axcess Dashboard. For help with the installation, review the knowledge base article How do I install, repair, uninstall, or download CCH Axcess products?

- Users must be created in CCH Axcess prior to logging in. For help with creating users, review the knowledge base article How do I add or create new staff users in CCH Axcess?

- A client must be set up in CCH Axcess before staff members can create engagements for the client. For help creating clients, review the knowledge base article How do I create a new client in CCH Axcess?

Logging in

Once users are created, they can log in by doing the following:

1. In a supported web browser (listed below), go to https://Knowledgecoach.cchaxcess.com.

2. Log in with your CCH Axcess credentials.

   Note: Your firm can use Knowledge Coach with Passive ADFS. For information on the use of ADFS with CCH Axcess, review the knowledge base article Introduction to Federation Services Authentication (ADFS) in CCH Axcess or CCH ProSystem *fx* Document.

3. Click **Start New Engagement** to create an engagement and search for the CCH Axcess client.

Browsers Supported with this Release

- Microsoft® Edge® (Internet Explorer® is no longer supported)

- Google® Chrome™ (Recommended)

- Mozilla® Firefox®