CCH Axcess™ Knowledge Coach

Welcome to CCH Axcess Knowledge Coach

This bulletin provides important information about the December 2020 release of Knowledge Coach. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Roll Forward Engagements to Subsequent Periods
Users can roll forward existing engagements to subsequent periods by using the Roll Forward option in the Actions menu on the All Engagements screen. During the roll forward process, users can set the new period end date, update forms to a later version of the content, if available, and keep or reset all responses in the forms.

Update Available
When new versions of the content are released, users can update existing engagements to the new versions without the need to create a new engagement. When new content is available, users can click the Update Available button that displays near the top of the screen to update the content in the existing engagement to the new version. During the update process all responses and sign-offs are retained.

Copy Engagements
Users can make a copy of an existing engagement with the Copy option in the Actions menu on the All Engagements screen. When creating the copy, users can choose to:

- Copy notes and signoffs.

- Keep the existing content or update to a newer version (if available).

- Keep or reset all responses.

New Knowledge Coach Content
The following updated Knowledge Coach titles are included with this release:

- 2020 Knowledge Based Audit of Real Estate Entities

- Updated industry specific financial statement disclosure checklists for Real Estate Entities, Health Care Entities, and Not for Profit Entities

Industry-specific release notes are available for each industry on the Support site.

The 2020 forms include CCH® Accounting Research Manager® material links to specific guidance that provide instant access to detailed analysis related to the steps and processes discussed in the workpapers.

As industry titles are updated, they will be automatically available to users inside of Knowledge Coach without the need to manually download and manage installations.

Common Updates for CCH Axcess
The Chromium embedded framework is now installed as part of the Common components within Install and Update Manager. This framework replaces the Internet Explorer embedded browser and requires the Microsoft® Visual C++ Redistributable. Install and Update Manager installs this redistributable as part of the prerequisites for CCH Axcess if it does not already exist on the computer where you are installing CCH Axcess.

We no longer install the Microsoft® Office Access Database Engine 2007 as a prerequisite within Install and Update Manager. Additionally, we do not uninstall this component on any machine.

As we have previously communicated through CCH Software News, the November 2019-5.0 CCH Axcess release included several changes to our 2-Step Verification process, including new modes for authenticating through an Authenticator app. Click here for more information regarding the changes and how they may impact users of our cloud-based software solutions.

Getting Started with Knowledge Coach

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

- Use the Install and Update Manager to install the CCH Axcess™ Dashboard. For help with the installation, please 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, please 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 in CCH Axcess, please 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 recommended 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, please 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®