CCH Axcess™ Knowledge Coach

Welcome to CCH Axcess Knowledge Coach July 2021

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

New Content Available

- June 2021 US GAAP Annual Financial Statement Disclosure Checklist
- June 2021 US GAAP Interim Financial Statement Disclosure Checklist

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 Install and Update Manager to install 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?

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 using 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®