

# CCH Access™ Knowledge Coach

## Welcome to CCH Access Knowledge Coach May 2021

This bulletin provides important information about the May 2021 release of CCH Access Knowledge Coach. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

## New in this Release

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### Knowledge Coach Form-Level Diagnostics

Clicking the diagnostic count on the form tool bar within a Knowledge Coach form now opens a pane that lists the diagnostics for the open form. Filter the list for specific diagnostic types and use the blue triangle to go directly to the diagnostic in the form.

### ADSync Tool

If your firm uses the CCH Login (username/password) mode of authentication, the following information is not applicable.

If your firm uses Federated Services with the ADSync Tool, you can now create the OAuth token using a new feature in Dashboard. This new option is only applicable to firms using our Passive with IDaaS mode of authentication. To access this feature, do the following in Dashboard:

1. Click **Application Links**.
2. Click **Utilities** under Firm.
3. Click **Common on the navigation pane**.
4. Click **ADSync Authentication Token**.

Any firm using older modes of Active Directory Integration or ADFS Active mode should continue to use the existing method for AD synchronization.

Firms using the Passive without IDaaS mode of authentication should use the older ADSync Tool or move to Passive with IDaaS to use the newer ADSync Tool.

Please contact our Wolters Kluwer support team if your firm needs to move from Passive without IDaaS to Passive with IDaaS mode of authentication. Click [here](#) for more detail on when and how to use this new OAuth Token for the AD Sync Tool when CCH Access is configured for Passive with IDaaS mode of authentication.

## New Content Available

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2021 Knowledge Based Audits of Employee Benefit Plans and financial statement disclosure checklist

2021 Knowledge Based Examinations of Service Organizations

2021 Knowledge-Based Non-Traditional Engagements - Agreed Upon Procedures

2021 Knowledge-Based Non-Traditional Engagements - Consulting

2021 Knowledge-Based Non-Traditional Engagements - Examinations

2021 Knowledge-Based Non-Traditional Engagements - Reviews

For more information on the changes in these titles, review the title release notes and title overviews for each at [Wolters Kluwer Tax & Accounting Support \(cch.com\)](#).

## Getting Started with Knowledge Coach

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### Prerequisites:

- CCH Access Install and update Manager must be installed. For help with the installation, please review the knowledge base article [How do I install CCH Access Install and Update Manager?](#)
- Use the CCH Access Install and Update Manager to install the CCH Access Dashboard. For help with the installation, please review the knowledge base article [How do I install, repair, uninstall or download CCH Access products?](#)
- Users must be created in CCH Access 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 Access?](#)
- A client must be set up in CCH Access before staff members can create engagements for the client. For help creating clients in CCH Access, please review the knowledge base article [How do I create a new client in CCH Access?](#)

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

5. In a recommended web browser (listed below), go to <https://Knowledgecoach.cchaccess.com>.
6. Log in with your CCH Access™ credentials.

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

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

## Browsers Supported with this Release

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- Microsoft® Edge® (Internet Explorer® is no longer supported)
- Google® Chrome™ (Recommended)
- Mozilla® Firefox®