

CCH[®] ProSystem fx Engagement and CCH[®] ProSystem fx Knowledge Coach

Welcome to Engagement and Knowledge Coach v2021.1.2

This bulletin provides important information about the v2021.1.2 release of Engagement and Knowledge Coach. With this release, upgrade from Engagement and Knowledge Coach v2019 or v2020 is supported. Review this bulletin carefully. If you have any questions, additional information is available on [CCH Support Online](#).

Important: Information on installing Engagement is in the knowledge base article Installation Guidance for CCH[®] ProSystem fx[®] Engagement on CCH Support Online. Also, a *Deployment Planning Guide* is available in the Documents folder with the Install Media.

Deployment Information

2021.1.2 Provided Only on Software Delivery Manager

This Engagement 2021.1.2 release is only available through Software Delivery Manager and uses an MSI for upgrading your workstations. It will not be available to download directly from our Support site.

The following firms should install this 2021.1.2 release on all servers and workstations:

- Your firm has not previously installed a release of Engagement.
- Your firm is upgrading from a 2019, 2020 or prior 2021 release of Engagement in order to work with all features and resolved issues

Note: For firms with an earlier version of 2020 already installed, there is no database upgrade when deploying this latest release. This allows for workstations to be upgraded separately from the server. A firm can work in a mixed environment if all machines have any 2020 release installed. We do, however, highly recommend that all workstations are updated with this release.

Supported Technologies

Supported Technologies. The following technologies are now supported:

- Microsoft[®] Windows Server 2019.
- Microsoft[®] SQL Server 2019
- Intuit QuickBooks 2021
- Adobe[®] Acrobat[®] DC 2021

Unsupported Technologies. The following technologies are no longer supported:

- Microsoft[®] Windows Server 2012.

- Microsoft® SQL Server 2012
- Microsoft® Windows 7
- Internet Explorer - Please note we will no longer support Internet Explorer with our September Engagement and Engagement Organizer releases.

New in this Release – Engagement

Chart of Accounts display correct subgroups. The Chart of Accounts dialog now displays the correct subgroups even when subgroups of other groups use the same index.

Finalized binder synchronization improvements. Local File Room finalized binders will no longer overwrite an existing Central File Room finalized binders when a binder is finalized more than one time resulting in an incorrect higher version binder.

Terminal server delay resolved when loading login prompt. Login dialog no longer appears to pause when "Loading directory settings" during application launch.

Create Trial Balance Report dialog displays trial balance database in in correct order. ‘Source for default field values’ field on the dialog will display data correctly.

Delete Binder API improvement. Fixed issue where Delete Binder API fails to delete a finalized binder.

Code optimization. The code for Engagement Admin module has been optimized to handle large data sets.

Check staff assignment when receiving Binder Packages. The application now checks for staff assignment when receiving binder packages. Only if the staff are assigned to the binder package, can they receive it. If not, they will see an error message saying that they are not assigned to the binder. Binder packages from another firm are not impacted by the assignment check.

Back-up and Restore Utility behaves as expected for full back-up. Staff can now use the Back-up and Restore Utility to run full back-ups without any errors.

Default setting of Document Completion Date report can be modified. Staff can now modify the default setting of the Document Completion Date report without any errors.

Sporadic binder finalization failure resolved. Staff can now finalize binders without experiencing sporadic failures.

Roll forward binder no longer freezes when converting .xls/.doc is selected. Staff can now select “Convert Microsoft Office .xls and .doc workpapers to the .xlsx or .docx format” and roll forward the binder without experiencing freezing during the process.

New in this Release – Knowledge Coach

New Risk Type. New risk type option, “Other” in the risk pane for documenting risks that do not qualify as fraud or significant

Diagnostics erroneously displayed in finalized binders. Knowledge Coach diagnostics will not be displayed in finalized binders including existing binders that have already been finalized.

Improve Copy/Paste Disclosure Checklists. KBA-901 Disclosure Checklist can successfully be copied and pasted with responses from a rolled forward binder to any other binder.

2021.1.2 for Administrators

Administrators will be interested in the following changes:

Important: Citrix/Terminal Server with Published Application. The published application will require a change to launch the PfxEngagement.exe. The shortcut to launch the application has been modified to use the PfxEngagement.exe. This replaces the PfxStart.exe used in previous versions of Engagement.

Updated Dependencies with This Version. The following technologies are required for this version. If you are deploying using push, these dependencies should be deployed prior to deploying version 2021. Application dependencies can be found in the applications folder of the image from Software Delivery Manager.

- Microsoft® Visual C++ 2015-2019 Redist
- Microsoft® .NET Framework 4.7.2

Recommended Best Practices from Our Support Team

Following are some best practices recommended by our Support team:

- Create scheduled tasks for backing up your databases and managing central bins.
- When rolling out new computers, deploy 64-bit SQL.
- For your Microsoft® Office 365 subscription, we recommend the semi-annual channel or manually scheduled updates.
- Engagement may not work as expected when there is insufficient drive space when upgrading Windows 10. Application may require repair to address component errors after deploying major version updates.

Other Information

Information on technical and application-specific considerations is in the following knowledge base articles on CCH Support Online.

- Technical Considerations for CCH® ProSystem fx® Engagement
- Application-Specific Considerations for CCH® ProSystem fx® Engagement

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