

# CCH<sup>®</sup> ProSystem fx<sup>®</sup> Engagement and CCH<sup>®</sup> ProSystem fx<sup>®</sup> Knowledge Coach

## Welcome to Engagement and Knowledge Coach 2023.1.1

This bulletin provides important information about the 2023.1.1 release of CCH<sup>®</sup> ProSystem fx<sup>®</sup> Engagement and of CCH<sup>®</sup> ProSystem fx<sup>®</sup> Knowledge Coach. Please 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

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### 2023.1.1 Provided on Software Delivery Manager

This Engagement and Knowledge Coach 2023.1.1 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 2023.1.1 release on all servers and workstations:

- Your firm has not previously installed a release of Engagement.
- Your firm is upgrading from a 2021 or 2022 release of Engagement to work with all features and resolved issues.

## New in this 2023.1.1 Release - Engagement

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### Engagement plugin for 64-bit Adobe<sup>®</sup> Acrobat<sup>®</sup> Standard and Professional

An Engagement plugin for 64-bit Adobe<sup>®</sup> Acrobat<sup>®</sup> Standard and Professional is available so that staff members can work with tickmarks and workpaper references in PDF documents. An Engagement plugin is not provided for 32-bit or 64-bit Adobe<sup>®</sup> Acrobat<sup>®</sup> Reader<sup>®</sup>.

- **Tickmark images replaced.** All Engagement provided tickmarks will be replaced with 24-bit depth image during installation. Any custom tickmarks should be recreated as a 24-bit depth image.
- **Security must be enabled.** Acrobat 64-bit now requires for security to be enabled. For more information refer to this [Knowledge Base](#) article.

### Default Installation location is now Program Files (x86)

For a new installation of Engagement and Knowledge Coach, the default installation location is Program Files (x86).

- **Improved Microsoft<sup>®</sup> Windows<sup>®</sup> user permissions.** The application now installs with improved end user permissions by removing modify/write access to folders not required for runtime.

### Updated Amyuni document converter

The print driver for converting workpapers in the Engagement binder to PDF is updated to Amyuni Document Converter 650.

### Bulk edit with Client Properties Admin View

The Client Properties report in the Admin Views Utility is updated to allow for bulk editing the client ID, name and/or name 2. The view can be filtered as needed and exported to CSV. The exported CSV can then be updated for any clients whose ID, name and/or name 2 should be edited. When the updated CSV is imported to the Client Properties view, the clients in the Engagement database are modified.

### New APIs

The following new APIs are provided with this release:

- **Get list of team members.** A new API that allows for retrieving a list of staff assigned to a team.
- **Add or remove team members.** A new API that allows for adding or removing staff on a team.
- **Set temporary password for staff.** The staff API is updated so that a temporary password can be assigned for staff members.
- **Import IBAL and prior period balances.** The trial balance API is updated so that any balance supported with *Paste TB Import* can now be imported with the API. This includes current period Other Imported Balances (IBAL 1 thru 3) and prior period balances.

### Resolved Issues

The following resolved issues are included in this release:

- **Workpaper name and index links** now correctly convert to static values when a workpaper is published.
- **Import Conversion Wizard** now successfully imports CCH ProSystem fx Trial Balance current and prior period balances for a quarterly binder.
- **Overwriting a previously exported account grouping list** is now working as expected.
- **iBinder API** now allows for unassigning a staff member even when that user is assigned to a staff group where the permission to change binder staff assignments is not granted.
- **Tax Regrouping Utility** now correctly regroups UltraTax 2022 groups.
- **Publish Knowledge Coach workpaper** issue is resolved so that dynamic data can be converted to static text.

## New in this 2023.1.1 Release - Knowledge Coach

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### Updates to the Add Specific Risk section of the Risk Summary

Updates to the Add Specific Risk section of the Risk Summary are made to support changes for audits performed using SAS-145 including new risk type Accounting Estimates. For more information on Knowledge Coach content changes, please review release notes and KCO-001 Title Overview for each Knowledge Coach title.

### Install Knowledge Coach Titles utility includes ability to delete selected Knowledge Coach titles

All system, including all user machines and servers, must be updated to the same application version to successfully delete the selected titles. Contact our support team for more information.

## Supported Technologies

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### Supported technologies:

- Microsoft® Windows® 11
- Microsoft® SQL 2022

- Microsoft® Server® 2022
- Intuit® QuickBooks® 2022
- Adobe® Acrobat® Standard and Professional 64-bit

## Recommended Best Practices from Our Support Team

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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.
- Before upgrading your operating system, please refer to this [Knowledge Base article](#).
- Engagement may not work as expected if there is insufficient drive space when upgrading Microsoft® Windows® 10. The application may require a repair to address component errors after deploying major version updates.

## Other Information

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Information on technical and application-specific considerations 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](#)

## CCH Software News Delivers Valuable Product Information via Email

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