CCH® ProSystem *fx*®
Knowledge Coach

How to Prepare Checklist – Training

Professional and Client Services

Wolters Kluwer
When you have to be right

Introduction

This checklist is designed to provide you with step by step guidance that will ensure you are successfully prepared for your upcoming CCH® ProSystem *fx*® Knowledge Coach ("Knowledge Coach") training and/or consulting sessions. The checklist addresses the hardware, software, and training requirements and recommendations that must be considered or completed prior to training. The steps in this checklist are presented in the chronological order that they should be completed.

Notes and Recommendations

- You **should not** print and/or complete this entire checklist as some portions may not apply to you.
- The instructions provided in this checklist must be completed prior to the start of the session. It will **NOT** be covered during the session. Thus, you may need to contact CCH Technical Support (800-739-9998 option 4, then 2) for assistance in preparing for your session.
- It is not necessary to complete this entire checklist more than once. If you are scheduled for multiple training and/or consulting sessions, **this checklist will be the same for all sessions** except for Addendum D - *Download Training Materials and View Course Specific Information*.
- **You must download, print and/or save your training materials, located in Addendum D, before your session.**
- You should read through this entire checklist and begin preparations **as soon as possible**. Please note that the time required to adequately prepare can vary widely.
- You should share this document with the person(s) responsible for the installation of the software.
- It is extremely important that all items be considered and completed **well before your scheduled training**. If you are not prepared, your training could be delayed or even cancelled and rescheduled.
- The installation information provided in this document may not be ideal in your IT environment. It is highly recommended that you consult with an IT professional or contact **CCH Technical Support** prior to installation to discuss installation plans.
- All hyperlinks to guides and additional materials in this document will provide information relevant to the most recent version of Engagement (version 7.2). If you are using an older version, you can find the same guides and materials specific to your version on the *Guides* tab of the Engagement Support Website.

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Step 1 - Install the Software

☐ If this is also a first time CCH® ProSystem *fx*® Engagement (“Engagement”) installation, please refer to the *How to Prepare for Training Checklist* included in your Engagement training materials.

☐ It is highly recommended that Knowledge Coach be installed by an IT professional. If additional assistance is necessary, you may want to purchase a CCH® ProSystem *fx*® IT Consulting session.

☐ Ensure that the most current version of Engagement is installed and functioning properly on each participant’s computer. Engagement v7.2 is required to use the most recent Knowledge Coach Titles. To verify the version of Engagement, log into the Engagement Workpaper Module, and select **Help Menu/About ProSystem *fx* Engagement.** This method will yield the most accurate version.

☐ Ensure that your server is capable of handling the software.

☐ Ensure that all computers have the minimum system requirements, including the necessary Windows and Office service packs. Knowledge Coach **requires** the use of Microsoft Office 2007 or newer. **Microsoft Office 2003 is not compatible with Knowledge Coach**.

☐ The most current version can be accessed via *Software Delivery Manager*. Please refer to the Software Delivery Support Website.

☐ To modify a current installation or for detailed installation, configuration and deployment information refer to the ProSystem *fx* Engagement Installation Guide and the Deployment Planning Guide.

☐ Check for Knowledge Coach updates, and ensure all Knowledge Coach updates are installed, http://support.cch.com/updates/KnowledgeCoach/. You should consider this step even if you are not installing Knowledge Coach for the first time.

☐ Contact **CCH Technical Support** at (800) 739-9998, option 4, for additional installation support.

Step 2 - Setup the Engagement Admin Module

☐ You should **consider** these steps even if you are not installing Knowledge Coach and/or Engagement for the first time.

☐ Ensure the Administrator Module is installed and functioning properly on the server.

☐ Download licenses. View the Admin User Guide page 20 to obtain detailed instructions.

☐ Assign Knowledge Coach licenses to all users/staff. Note the Knowledge Coach module and Knowledge Based Audit Title licenses (i.e. Commercial Entities, Healthcare, Government, etc.) are required for all training sessions (with limited exceptions). View the Admin User Guide page 21 to obtain detailed instructions.

☐ Create a new staff group named “Training”. View the Admin User Guide pages 8 and 9 to obtain detailed instructions.

☐ Ensure that **ALL** user/staff group rights (permissions) are enabled for the “Training” staff group. View the Admin User Guide page 10 to obtain detailed instructions.

- ☐ Setup all users/staff under the "Training" staff group created in the step above. View the Admin User Guide pages 11-14 to obtain detailed instructions.
- ☐ Create a "Training" Central File Room to be used for the session. View the Admin User Guide pages 36 and 37 to obtain detailed instructions.
- ☐ Download and install all appropriate titles to one user's computer and release the titles to all staff. See the Knowledge Coach User Guide page 6 to obtain detailed instructions.

Step 3 - Check Software Functionality on Individual Workstations

- ☐ You should perform these steps even if you are not installing Knowledge Coach for the first time.
- ☐ Each user/staff should login to Engagement on his/her own computer **before training** to ensure that the program is functioning properly and to download user licenses. The computer **must be connected to the network** upon initial login. See Addendum A for detailed instructions.
- ☐ Ensure Knowledge Coach is installed and functioning properly on each participant's computer. See Addendum B for detailed instructions.
- ☐ Ensure Microsoft® Office Word and Excel are installed and functioning properly on each participant's computer. See Addendum C for detailed instructions.

Step 4 - Download Training Materials and View Course Specific Information

- ☐ View Addendum D to download training materials and read important information about your session.

Step 5 - Consider Your Training Environment

- ☐ Most Knowledge Coach training is designed to be hands-on. It is recommended that each participant have his/her own computer during training so that he/she can follow along. Training is generally much more successful when participants can actively take part.
- ☐ It is recommended that each participant's computer be connected to the office network for training.
- ☐ For web-based training, two screens are recommended for a single participant. For groups, a separate computer should be used to connect to the web meeting. This computer should be connected to a projector, large television, etc. for the entire group to view.
- ☐ For web-based training, CCH utilizes Adobe® Connect. This program is web based and does not require any software to be downloaded prior to the session. A link to the Adobe® Connect meeting room is provided in the scheduling confirmation email you received. Please note that the link may differ for each course.
- ☐ For onsite training, a projector, large television, etc. should be available for the consultant to connect to so that the entire group can view his/her computer screen.

- ☐ For onsite training, please allow ample room for the consultant, the consultant's computer, consultant's documents and the projector in the area the consultant will be located.
- ☐ If training will occur outside of your office, ensure that all computer hardware and software is functioning properly at the alternate location well before training. If participants will not be able to connect to your network, then **Step 3 above MUST be completed before the training**.
- ☐ Notify your consultant if training will be conducted at an off-site location.

Step 6 - Obtain CPE and Provide Feedback After Training

- ☐ Distribute to each participant the instructions on how to complete the online Training & Consulting *Feedback and CPE Request Form*. This form should be completed online at www.cchgroup.com/training/feedback. Your consultant will provide you with the required session code at the conclusion of your session. You will also need your CCH account number. Completion of this form is required to obtain CPE credit.
- ☐ You must complete an attendance form for each session. This form is **required** for CPE credit.

  Note: The attendance form is **not** required for MTS (Multiple-firm Training Session) sessions if each participant connects to the Adobe Connect meeting room individually **AND** answers all online polling questions administered throughout the session. It is also important that each participant enters his/her full name (first and last) and email address when connecting to the MTS web meeting to ensure proper CPE credit.

Addendum A: Test Engagement Functionality

To ensure Engagement is functioning properly on each user's computer:

1. Log into Engagement as the user who will be using the computer on a regular basis.
2. If prompted to select an office server, choose the server where Engagement is installed.
3. If prompted to create a profile, select "Yes".
4. If prompted to make it your default profile, select "Yes".
5. Right-click on the user's name in the *Local File Room Client Index* and select **New Client** to create a new client.
6. In the *Client Name 1* field, enter a fictitious name, and then click "OK".
7. Create a client binder by selecting **File/New Binder Wizard.**
8. Select "Next" to bypass the *Welcome to the New Binder Wizard* introduction window.
9. Select the fictitious client created in Step 6 above, then select "Next".
10. Select the "Training" Central File Room from the drop-down then select "Next".
11. Select the Audit or Tax *Sample Binder* under the *General* tab and select "Next".
12. Enter a fictitious binder name in the *Name* field then select "Next".
13. Select "Finish" (to bypass the remaining windows) and then "Create".
14. Select the client folder underneath the user's name, then select the binder that was just created (on the right hand side of the screen) and select **Tools/Synchronize Binder.**
15. Select "Next" to bypass the *Welcome to the Synchronize Binder Wizard* window.
16. Select "Finish", then "Synchronize". The status of the synchronization should show "Completed" in the *Synchronization Job Queue* window.
17. Do not close Engagement. First, complete the Word, Excel and Adobe tests below in Addendum B.

Proceed to Addendum B
Return to Step 3 of the checklist above.

Addendum B: Test Knowledge Coach Functionality

To ensure that Knowledge Coach is functioning properly on each's user computer:

1. Double-click on the Engagement binder created in Addendum A.
2. Right-click on any tab in the *Binder View*, and choose "New Knowledge Coach Workpaper".
3. Select the drop-down at the top of the pane to select one of the titles installed. (If no titles are available, refer to Step 2 for steps to ensure licenses and title(s) are properly installed and released.)
4. Select the "+" sign next to the 100 index. (The Foundation workpapers will be selected by default to insert into the binder and cannot be unselected.)
5. Click "OK" twice to insert the workpapers.
6. Open *AUD-100 Tailoring Question Workpaper* and check to ensure the Knowledge Coach ribbon appears at the top of the window. If the ribbon is missing or there are errors, try closing the Knowledge Coach workpaper and reopening. If the ribbon is still missing or there are errors, the **Word Add-Ins** will need to be re-added or contact CCH Support. (If the Knowledge Coach title was not released, a warning will appear when a Knowledge Coach workpaper is opened. In this instance, refer to Step 2 for steps to ensure licenses and title(s) are properly installed and released.)
7. Scroll to page 2 of the form, and click on one of the answer selection options and choose an answer. If you receive a message, refer to Step 2 for steps to ensure licenses and title(s) are properly installed and released or contact CCH Support.
8. Do not close Engagement. First, complete the Word and Excel tests below.

Proceed to Addendum C
Return to Step 3 of the checklist above.

Addendum C: Test Microsoft Office Functionality

To ensure that Microsoft Word and Excel are functioning properly through Engagement, perform the following steps:

1. Open the sample binder created previously.
2. Select **View/Expand All.**
3. Select and open any Word document in the binder.
4. For **Microsoft Office 2007 - 2013:** Verify the **Engagement** ribbon/tab appears along with the Home, Insert, Page Layout, etc. ribbons/tabs. If the **Engagement** tab is missing or there are errors when opening Word, contact CCH Support.
5. Perform steps 2 through 4 above again using an Excel file found in the sample binder.

Proceed to Addendum D
Return to Step 3 of the checklist above.

Addendum D: Download Training Materials and View Course Specific Information

Session Name

CCH ProSystem *fx* Knowledge Coach Training

Who Should Attend?

All firm employees who participate in the planning, performing, and reviewing of audits should attend.

Suggested Prerequisites

CCH ProSystem *fx* Engagement Training I (A&A)

Download Training Materials

To download the **training guide**, select the version of Engagement you have installed from the list below (download **only one** training guide):

v7.2
v7.1
v7.0

To download the **binder template** for training, select the version of Engagement you have installed from the list below (download **only one** template):

v7.2
v7.1
v7.0

If the version of Engagement that your firm currently has installed is not listed, please contact the Scheduling Coordinator to obtain the appropriate training files.

Downloading and Saving Binder Templates:

1. The binder template should be saved to **C:\Pfx Engagement\WM\Binder Templates** (unless your firm uses an alternate location to save binder templates; contact your IT department if necessary to determine the file path where the templates should be saved).
2. If you are not sure where to save the binder template, to determine the file path where the binder template should be saved, open Engagement and select **Tools/Options/Templates.** The binder template should be saved in the path designated in the *Binder Templates* field.
3. Binder templates should be saved as **.atp** files, **not .zip** files. When saving a binder template, select the "Save as" option and add the extension ".atp" to the end of the existing name prior to saving the file in the path noted above.
4. Do not attempt to open the binder template on your computer. It can only be opened from within Engagement.
5. Be patient. It may take longer than you expect before your computer asks you to save or download the binder template file.

Return to Step 4 of the checklist above.

Proceed to Step 5 of the checklist above.