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ACCOUNTING

2012 Review of CCH IntelliConnect

Nov. 26, 2012

CCH, a Wolters Kluwer business – IntelliConnect

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CCHGroup.com

From the Dec. [2012 review of tax research](#) systems.

BEST FIT: Tax, accounting and legal professionals looking for a comprehensive tax and research solution.

STRENGTHS

- Available on iOS and Android mobile devices – CCH Mobile
- Various search options tailored to the user's needs and preferences
- Can have up to ten open tabs, including Home and Browse
- Easily view search results by document type using categorized view

POTENTIAL LIMITATIONS

- Limited integration with third-party solutions

IntelliConnect is the tax and accounting research solution by CCH, a Wolters Kluwer business. Also, available as a mobile app, IntelliConnect provides users with the latest tax and accounting news, content and resources. Recent enhancements include an updated navigation bar, links to Federal and State tax forms from the Quick Bar, a

new series of tax law tutorials focused on understanding sources of tax law, new Smart Charts, a new CCH Expert Treatise library and updated cigarette/tobacco, and insurance content in the State Tax Reporters. IntelliConnect is also available via CCH Mobile, CCH's IntelliConnect mobile app.

Basic System Functions: 5 Stars

IntelliConnect is available online. When users login, the day's tax news highlights are displayed on the right and the Browse Tree is on the left. As users search, either through the Browse Tree or the keyword search, the preview pane displays on the right. Users can customize what's shown when they log in and adjust the size of the windowpanes. Quick links are available at the top of the screen for users to quickly access documents in their document tray, their history, saved searches, practice areas, preferences and help.

In the left windowpane, users can easily switch between the Browse Tree, Research Folders, Tracker News, Citations search, Tools/Smart Charts, Forms and IRS FAQs.

Content: 5 Stars

IntelliConnect offers several search options for users. Subscribers can search using the search box at the top of the screen, search via the browse tree or search using citations. Search suggestions display as the user types in terms. Results are shown on the right in the default categorized view, which can be toggled on or off at the top of the search results screen.

The search results list can be sorted by document type or category, relevance and most recent. In Categorized View, each category is automatically sorted by relevance. Users can jump directly to a category by clicking on a link at the top of the search results. Each search a subscriber performs opens in a new tab; nine search tabs can be open at one time. Users can save results from each search and access them through the CCH Mobile App.

Users can place documents in the document tray to view or print later. In addition, the IntelliConnect home page features a link to CCH's state tax blog, The SALT Minds, CCH's Federal Tax blog, Tax Chat from the Hill, and a Tip of the Week, which is emailed to subscribers. New and enhanced content includes hospitality Smart Charts, an oil and gas tax news Tracker and revised insurance and cigarette/ tobacco content in the State Tax Reporters. Users have quick access to IRS forms and FAQs as well as federal tax rates and tables. There is also a new sales and use tax rate change

Smart Chart, improved display of IRS publications and a link to Smart Charts on the Quick Bar.

Customization: 4.75 Stars

Users can customize IntelliConnect to their individual IDs, allowing them to choose which practice areas are shown, what content is displayed upon login and how search results are shown. Preferences can be set so that a new tab opens for each search and content excerpts are shown in search results.

In addition, users can choose which news topics they prefer to receive and Tracker News will deliver the tailored content directly to the user's email. Users can specify the email format and choose additional customization options. Other preferences users can set include whether graphics display in-line or in a new window, the display of help and information buttons, how multiple documents are printed and whether the URL appears on printed documents.

IntelliConnect's various search options let users research topics using the method that is the easiest and most preferred by them. Users can also create research folders and store documents to those folders.

Integration/Import/Export: 4.75 Stars

Through IntelliConnect's integration with ProSystem *fx* Tax, users can access numerous research tools, such as the Internal Revenue Code, U.S. Master Tax Guide and the Tax Prep Partner Series. IntelliConnect exports content in text, Word and PDF formats, as well as allowing for copy and paste functions to other programs. Users can also email documents directly from the platform to others.

Help & Support: 4.75 Stars

IntelliConnect's Help option brings up a traditional help menu that covers a variety of topics for navigating through the program, as well as a list of FAQs. It also lists contact information for contacting CCH. The home page also lists links for phone, internet and email support, as well as links to training classes.

IntelliConnect is updated automatically and requires no installations or updates on the user's end. The home page also lists a link to download the CCH Mobile app.

Summary & Pricing

IntelliConnect is a tax and research solution that can be used by firms of all sizes to search a wide range of content and topics. Library subscriptions start at \$200, with additional users added and priced accordingly.

2012 Overall Rating: 4.75 Stars

Accounting • Taxes

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