

CCH[®] ProSystem *fx*[®] Scan

Welcome to CCH ProSystem *fx* Scan v15.0

This bulletin provides important information about the v15.0 release of Scan. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Persist Column Settings for Job Queues

All Scan Jobs queues (current and history) now retain the column sort, filter and size set until the grid is reset, thus enabling users to locate the same type of Scan jobs without reapplying the sort or filter criteria.

Batch Creation of Cover Pages

Cover pages may now be uploaded to the Workstation via TXT file. This significantly reduces the time it takes to produce cover pages each year.

Sent to Document Tracking

When "Send to Document" is initiated by a user at any time during the process, a Sent to Document informational icon and details is retained by the server for tracking purposes in the History queue. This does not include files sent to Document through a routing slip.

Error Files in Scan Workstation

Files that have errored out can now be deleted through Scan Workstation rather than going to Scan Administrator, thus enabling a staff member to clear these jobs from the server immediately without involving firm IT administrators.

Error Files in the Archive Folder

Files that have errored out can now be easily identified in the Archive folder with "Errored_" prepended to the file name. This allows for quick identification if additional support is required.

Scanned Pages

Pages scanned in greater than 600 dpi are no longer resized. All pages now retain properties of the original scan leading to better handling and recognition of these documents, also enabling AutoFlow annotations to align more accurately on the text.

AutoFlow Gain & Loss Annotations

Annotations for gain and loss items are now separate from annotations for other forms. Previously there was a single box to check during AutoFlow to "Save annotations for items." Now, in addition to this box, there is a separate checkbox to "Save annotations for G&L items" which can be unchecked to exclude gain and loss annotations specifically. This prevents the significant performance issues that can occur when opening and viewing files in Adobe[®] Acrobat[®]. In Scan Administrator, staff members can choose to hide the "Save annotations for G&L items" checkbox so that users cannot check or uncheck that annotation option.

Copy File Idle Time and Zero-Byte File

In previous versions, these settings could only be adjusted by changing the configuration files. Firms can now make adjustments via the settings on the General Settings tab of Scan Administrator.

Help and About

Help and About now includes firm account information and a link to online support for faster support access.

PDF with Gain & Loss Only Option

PDF with Gain & Loss Only option is now available for CCH Axxess Tax. This option allows the gain and loss detail schedule and attachments to be produced without requiring AutoFlow for at least one form (previously available for ProSystem fx Tax firms).

Return Confirmation during AutoFlow

When a staff member selects a return to AutoFlow, a confirmation screen now shows the user the return selected and prompts for a "confirmation." This confirmation screen must be turned on in Scan Administrator.

Additional Form AutoFlowed for Form 1041 Returns

1099-MISC is now available for AutoFlow for Form 1041 returns.

PDFlyer Sticky Note

The default text on the Sticky Note can now be removed by double-clicking on it. Users no longer have to manually remove the default text, making it easier and quicker to enter a note.

PDFlyer Unlicense Function in License Server

Upload a TXT file with a list of computer names to unlicense computers for PDFlyer in a batch, and to return licenses to the server for new installations.

Adobe® Acrobat® Support

PDFlyer v15.0 will install for use with Adobe® Acrobat® XI, Adobe® Acrobat® DC for both the Continuous and Classic tracks. The ability to install PDFlyer for use with Adobe® Acrobat® XI will be discontinued with the December 2019 release.

Known Issues

Known issues addressed in this release include:

- Archive file name maintains name used on cover page rather than defaulting to name provided while scanning
- Addressed issue with cover page bar code
- Fine-tuned Blank Page Removal by providing more options to customize blank page removal at the firm level and optimized default setting
- Addressed issue of calculator tape font resizing when Adobe® Acrobat® Undo function is used.

Installing Scan

Online Software Delivery

We deliver all software exclusively through downloads. For more information on online software delivery, including FAQs and system requirements, please visit <https://Support.CCH.com/Online-Software-Delivery>.

Catalog updates are available via the Scan Support Web site or through automatic updates in Scan Administrator. They are delivered weekly, as needed, from January through April 15. Our policy is to support forms for the current tax year and the two prior tax years immediately preceding it. This policy ensures accuracy and minimizes catalog size and download times.

Please refer to the Scan system requirements page on CCH Support Online for additional information.

Installing Scan Administrator

If you are updating from a previous version of Scan, the installation automatically detects a previous version of Scan and removes it.

Note: Scan is memory and CPU intensive. We recommend that you do not install Scan on a server or workstation that houses other critical applications, as it will degrade the performance of the other applications. Scan can be installed on a high-end workstation, if necessary, to avoid this issue. Import, export, and archive folders can be located on a separate server or file share.

Microsoft® .NET Framework 4.6.0 must be installed on the server or dedicated workstation running Scan Administrator. If you have not already installed .NET Framework 4.6.0, it is installed for you during the installation process.

The following steps guide you through installation of the Scan Administrator program files if you do not use a Scaled Server installation. If you use a Scaled Server installation, please contact Customer Support at 1-800-PFX-9998 (1-800-739-9998) for assistance.

1. Log in to the server or dedicated workstation where you plan to install Scan v15.0. Verify that your account has Administrator rights.
2. Download and launch **prosystem_fx_scan_15.0.0.6.exe**.
3. Click **Next**.
4. Review the License Agreement.
5. Click **I Agree**.
6. If needed, change the destination folder where Scan should be installed by clicking **Browse** and navigating to or entering a new location. The default import, archive, and export folders are added to the Scan shared folder as part of the installation process.
7. Click **Install**. Wait for the installation to complete.
8. Select the permission key option for this installation.
9. Click **Next**.
10. Click **Finish**.

Installing Scan Workstation

If you are updating from a previous version of Scan Workstation, the installation automatically detects the previous version of Scan Workstation and removes it.

Microsoft® .NET Framework 4.6.0 must be installed on each workstation running Scan Workstation. If you have not already installed .NET Framework 4.6.0, it is installed for you during the installation.

To install the Scan Workstation program files, do the following:

1. Browse to **\\<computer name>\Workstation**.
2. Launch **ProSystem fx Scan Workstation.exe**.
3. Click **Next**.
4. Review the License Agreement.
5. Click **I Agree**.
6. If needed, change the destination folder where Scan Workstation should be installed by clicking **Browse** and navigating to or entering a new location.
7. Enter the Scan Main Server Machine Name where Scan Administrator is installed.
8. Click **Next**.

9. Click **Install**. Wait for the installation to complete.
10. Click **Finish**.

Installing PDFlyer

Install PDFlyer on workstations licensed for Adobe® Acrobat® Standard or Professional, versions XI, or DC (Continuous and Classic tracks). PDFlyer will not run with Adobe® Reader®.

Microsoft® .NET Framework 4.6.0 must be installed on each workstation running PDFlyer. If you have not already installed .NET Framework 4.6.0, it is installed for you during the installation.

To install the PDFlyer program files, do the following:

1. Browse to **\\<computer name>\Workstation**.
2. Launch **ProSystem fx PDFlyer.exe**.
3. Click **Next**.
4. Review the License Agreement.
5. Click **I Agree**.
6. If needed, change the destination folder where PDFlyer should be installed by clicking **Browse** and navigating to or entering a new location.
7. Click **Install**. Wait for the installation to complete.
8. Click **Finish**.