Wolters Kluwer
CCH

Scan

Installation Guide

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Chapter 1

Overview and Installation

The paperless workflow can be a reality for your firm with ProSystem *fx* Scan. Scan generates bookmarked PDF files from scanned client documents. These files can then be stored in ProSystem *fx* Document, ProSystem *fx* Document (On-Premise), CCH Axcess Document, or any other Microsoft Windows-based document management system that includes the ability to access PDF files. All the information needed to prepare tax returns is available in a digital form and can be stored in your document management system.

If your firm uses Tax, Scan can also extract data from the PDF files and flow it into client tax returns, dramatically reducing the amount of manual data entry that is required.

This guide provides information about installing the Scan components and performing the initial configuration for Scan. For more detailed information about administering and using Scan, see the *ProSystem fx Scan User Guide*.

Scan Components

Scan is a collection of services that work together to process your scanned documents. The services are accessible through two major components:

- **Scan Administrator** is the center of Scan processing. When scans are submitted for processing, Scan Administrator retrieves and optimizes them, then converts them into editable text with OCR. Finally, Scan generates the bookmarked PDFs and archives the original scanned file.

  Scan Administrator is also where firm-level Scan options are configured. For this reason, only staff members with system administrator privileges have access to Scan Administrator.

- **Scan Workstation** is the component that most staff members will use on a daily basis. Some of the tasks that you can perform in Scan Workstation include:
  - Generating cover pages and target sheets for Scan jobs
  - Uploading files to be submitted to CCH for review
  - Submitting jobs for processing
  - Monitoring documents as they are processed by Scan
  - Checking to see if you have the latest Catalog update installed
  - Validating the accuracy of extracted tax data
  - Flowing extracted data into Tax

Scan is also packaged with PDFlyer, a utility that gives you the ability to perform advanced manipulation of PDF files. Some of the tasks you can perform with PDFlyer include:

- Standardizing connectors and tickmarks
- Rotating PDF pages
- Rearranging the pages in a PDF by moving the associated bookmarks

System Requirements for ProSystem *fx* Scan Administrator

Scan Administrator is normally installed and run on a server, but can be installed on a dedicated workstation that meets the system requirements. Storage of the import, archive, and export folders can be located anywhere on your network, or on any workstation that you select, as long as they are shared folders with write access granted to both the computer where Scan Administrator is installed and the workstations that have Scan Workstation installed.

Component	Minimum	Recommended
Processor	Pentium 4	Multi Core Processor
RAM	2 GB	8 GB
Disk Space	1 GB for program files 1 GB for temporary data files	2 GB for program files 2 GB for temporary data files
Other Hardware	Monitor with resolution of 1024x768	Monitor with resolution of 1024x768 Hot-swappable storage backplane for multiple disk drives (optimal) Option for remote system management
Environments	32-bit version of Windows XP Professional (Service Pack 3) The following environments are not supported: - Microsoft Small Business Server - Citrix - Terminal Services Environments - Peer to Peer Networks - Server Environments with IIS installed	Dedicated Windows Server 2008
Other Software	Internet Explorer Adobe Reader Microsoft .NET Framework If Microsoft Office is installed, the most recent service pack must be applied before you install Scan components.	
Virtualization	VMware and Hyper-V are supported	

Suggestions for Achieving Optimal Performance with Scan Administrator

For best results, follow these guidelines for Scan Administrator:

- Do not install Scan Administrator on a computer that houses other critical applications, as it may cause degradation in performance to the other applications.
- Install and run Scan Administrator on multi-core processor systems, if possible. This allows Scan Administrator and the Windows operating system to distribute processes equally.
- The import, export, and archive folders can be on a workstation, fileshare, or server that is separate from the Scan Administrator machine.

Recommendations for High-Volume Firms

If your firm processes a large number of Scan jobs, we recommend the following additional measures to optimize performance:

- Drives should be high RPM, high capacity, Ultra/Wide SCSI-3 units.
- Disk controllers should include hardware-level support for RAID 0+1, provide on-board disk caching of at least 32 MB, allow for Write-Back (write to RAM) caching, and provide battery-backup for the onboard cache.
- Scan Administrator moves images and data across network connections. Depending on the number of workstations and images you are processing, the network bandwidth required can be significant. Multiply your network bandwidth by a factor of 3 or 4, or more (depending on your workflow) to accommodate the image data that will be transferred.
- We recommend that you set up Scan Administrator as a discrete sub-network isolated from other LAN applications to accommodate system traffic.

System Requirements for ProSystem *fx* Scan Workstation

Scan Workstation is installed on workstations where Scan jobs are assigned. Once installed, use Scan Workstation to monitor the workstation's documents as they are processed and generate cover pages and target sheets prior to the initial scanning of Scan jobs.

Component	Minimum	Recommended
Processor	1.2 GHz Intel or AMD processor or equivalent	1.8 GHz Intel or AMD processor or equivalent
RAM	512 MB	512 MB
Disk Space	1 GB for program files 1 GB for temporary data files	2 GB for program files 2 GB for temporary data files
Operating System	Windows XP Professional (Service Pack 3)	Windows 7
Operating Software	Microsoft .NET Framework 2.0 and 4.0 If Microsoft Office is installed, the most recent service pack must be applied before you install Scan components	

System Requirements for PDFlyer

Install PDFlyer on workstations licensed for Adobe Acrobat Standard or Professional, version 7 or higher. PDFlyer will not run with Adobe Reader.

The minimum hardware requirements for PDFlyer are the same as those for Adobe Acrobat Standard or Professional, version 7 or higher.

If Adobe Reader and Adobe Acrobat Standard or Professional are installed on the same workstation, uninstall Adobe Reader prior to installing PDFlyer.

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

Microsoft .NET Framework 2.0 must be installed on each workstation running PDFlyer. If you have not already installed .NET Framework 2.0, it is installed for you during installation.

Chapter 2

INSTALLATION

Recommended Workflow for Installing Scan Components

For best results, we recommend using the following workflow to install the Scan components:

1. **Identify the server or dedicated workstation where Scan Administrator will be installed**. Decide whether the Import, Export, and Archive folders will be located on the same dedicated computer as Scan Administrator, or if they will be installed on another server or fileshare.

2. **Identify how many import folders will be needed**. When you install Scan Administrator, a default Import folder is created for you. Your firm can have multiple Import folders as needed. See *Overview of Import, Archive, and Export Folders* on page 11 for more information.

3. **Identify the workstation or server where the import folders will be located**. Import folders should be at a shared network location that Scan Administrator and all Scan Workstations can access. Decide whether the import, export, and archive folders will be located on the same dedicated computer as Scan Administrator, or if they will be installed on another server or fileshare.

4. **Set aside time for installation**. Schedule installation for a time when you can make the transition without disrupting the office workflow. This reduces the risk of lost work time at the office when you install.

5. **Install ProSystem *fx* Scan Administrator**. This component should be installed on a server or dedicated workstation. See *Installing Scan Administrator* on page 6 for installation instructions.

6. **Configure Scan for your firm's use**. See *Configuring Scan* on page 10 for more information.

7. **Install ProSystem *fx* Scan Workstation and PDFlyer to the individual workstations**. These components should be installed on any workstation where any of the following tasks will be performed:

   - Document scanning
   - Submission of scanned files for Scan processing
   - Validation of extracted data
   - Sending extracted data to a Tax return

Installing Scan Administrator

We recommend that you install Scan Administrator on a dedicated server or workstation. Scan Administrator cannot be installed on Citrix or Terminal Services environments due to allocation of memory resources. If you install Scan Administrator on a multi-processor server or workstation, Scan distributes processes equally.

You must have administrator rights on the computer where you are installing Scan Administrator.

Note: If you are updating from a previous version of Scan, the installer automatically detects the earlier version of Scan and removes it.

To install Scan Administrator, do the following:

1. Log into the server or dedicated workstation where you plan to install Scan.
2. Insert the ProSystem *fx* Scan CD into the CD-ROM drive. The installation program should start automatically. If it does not, run **Setup.exe** from the CD.
3. Click **Install ProSystem *fx* Scan**. The Install Wizard displays.
4. Click **Yes** if you would like to continue with the installation without disabling your antivirus. Click **No** if you do not want to continue with the installation.
5. Click **Next**.
6. Review and accept the License Agreement.
7. Click **Next**.
8. If needed, change the location where Scan should create the ProSystem *fx* Scan Shared folder in the *Destination Folder* field. The default import, export, and archive folders are added to the shared folder as part of the installation process.
9. Click **Next**.
10. Click **Install**.
11. Select the permission key option for this installation. The options are as follows:
    - **Evaluation version**. This option allows you to use Scan for a limited evaluation period. If you have purchased a license for Scan, you should not select this option.
    - **Download permission key from the internet**. Select this option if you plan to access your permission key through the ProSystem *fx* Support Web site. After clicking Next, you will be asked to log in to the Single Sign-On (SSO) Web page with your user ID (ProSystem *fx* account number) and password.
    - **Use existing permission key**. If a permission key is detected on the server, this option is selected by default, and there is no need for you to select a different option. If a permission key is not detected, this option is disabled.
    - **Use permission key from drive path**. Select this option to browse to a permission key that is stored in a folder on the network or on a disk drive. Enter the location of the permission key, or click Browse to locate the file.
12. Click **Next**.
13. Select **Reboot now** to complete the installation process. You must restart your computer before you can configure Scan Administrator and before you can install Scan Workstation.
14. Click **Finish** to close the installation window.

Once installation completes, you can configure Scan Administrator. See *Configuring Scan* on page 10 for more information.

Running Services on a Scaled Server

If your firm processes many tax returns, using the Scaled Server installation can improve the overall performance of Scan. With this installation, Scan Administrator is run on one dedicated server, while two of Scan's most processing-intensive services, optical character recognition (OCR) and image enhancement, can be run on one or more separate computers.

Scan Administrator must be installed on a dedicated server before Scan Scaled Server can be installed. The operating system requirements for Scan Scaled Server are the same as for Scan Administrator.

Installing Scaled Server

If you are installing Scan Scaled Server for the first time, do the following:

1. Log into the computer that you will be using as the scaled server.
2. Place the Scan CD in the CD-ROM drive.
3. Browse to the **Scaled Server** folder on the CD.

   > **Note**: You must install from the CD. You cannot install Scaled Server by copying the folder from the CD.

4. Double-click **setup.exe**. The Install Wizard window opens.
5. Select **Yes** to continue with the installation. Select **No** to terminate the installation.
6. Click **Next**.
7. Review the License Agreement and accept the terms of the agreement.
8. Click **Next**.
9. Change the install location, if needed.
10. Click **Next**.
11. Select the services to run on this scaled computer.
12. Click **Next**.
13. Enter the IP address or the computer name of the computer where Scan Administrator is installed.
14. Click **Next**.
15. Restart the computer that is being used as a scaled server.
16. Verify that the installed service or services will start.

> **Note**: Depending on the processing capacity of the Scaled Server, you may want to configure only one of the services on a single computer. If needed, you can add an additional Scaled Server to run one of the services as well.

Configuring Scaled Server

Use the procedure below to configure a scaled server to run the Image Enhancement and OCR services included with Scan. Depending on the processing power of the scaled server and the volume of scanning your firm does, you may only want to run one service on this scaled server, and to run the other service on another computer.

1. Select **Administrative Tools** from the Control Panel.
2. Select **Services** in the list.
3. Locate the service associated with the Scan components you installed on the scaled server.
4. Right-click on the service you want to run from this server, and select **Properties**. Choose either **Image Enhancement** or **OCR**.
5. Select the **Log On** tab.
6. Select **This account**, and enter the domain name and user name of an administrative user with rights to both the Scan Administrator computer and the computer where Scaled Server is installed. The information should be in this format: **Domain\User name**.
7. Enter and confirm the password of the administrative user.
8. If you installed additional services on this computer, repeat steps 1 through 7 to configure the other services.
9. Click **OK**.

Note: When using Scaled Server to run Image Enhancement or OCR services, you may want to stop those same services from running on the Scan Administrator server so that more resources are available for running the remaining Scan services.

Installing Scan Workstation

If you are updating from a previous version of Scan Workstation, the installer will detect and remove the older version automatically.

Note: Microsoft .NET Framework 2.0 and 4.0 must be installed on each workstation running Scan Workstation. If you have not already installed .NET Framework 2.0 and 4.0, they will be installed for you during the installation.

To install Scan Workstation, do the following:

1. Browse to the installation setup files at **\\Computer Name\Workstation** and launch **ProSystem *fx* Scan Workstation.exe**.
2. Click **Next**.
3. Review the License Agreement and accept the terms of the agreement.
4. Click **Next**.
5. If needed, change the folder location or click **Next** to accept the default.
6. Click **Install**. Wait for the installation to complete.
7. Click **Finish**.

After configuring Scan Administrator and installing Scan Workstation on at least one workstation, you can use the 1040 or 1041 sample TIF test file in the ProSystem fx Scan\Sample folder to verify

that Scan is working properly. The 1040 file is named John Smith – 1040 Sample File.TIF. The 1041 file is named Rose Smith- 1041 Sample File.TIF.

After Scan Administrator is installed and configured, copy and paste the test file into an Import folder. The import file is automatically detected by Scan and processed, generating a PDF file in the export folder.

Note: If you process a sample file multiple times, the first instance of the PDF Export file is named 2012 John Smith (#23456).pdf, and each additional instance increments by one (for example, 2012 John Smith (#23456)-1.pdf). To prevent this, delete the sample file from the Export folder each time you process it.

Installing PDFlyer

Install PDFlyer™ on workstations licensed for Adobe Acrobat Standard or Professional, version 7 or higher. PDFlyer will not run with Adobe Reader. The minimum hardware requirements for PDFlyer are the same as those for Adobe Acrobat Standard or Professional, version 7 or higher.

If Adobe Reader and Adobe Acrobat are installed on the same workstation, uninstall Adobe Reader prior to installing PDFlyer.

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

Note: If you are installing PDFlyer to a terminal server, use *Add or Remove Programs* to remove an old version of PDFlyer, or place the Terminal Services in *Install* mode before attempting to install.

One license is required for each physical workstation where PDFlyer is installed.

Microsoft .NET Framework 2.0 must be installed on each workstation running PDFlyer. If you have not already installed .NET Framework 2.0, it will be installed for you during the installation.

To install PDFlyer, do the following:

1. Browse to the location of the installation setup files at **Computer Name\Workstation**.
2. Double-click **PDFlyer.exe** to launch.
3. Click **Next**.
4. Review the License Agreement, and then select the **I accept the terms of this License Agreement** radio button.
5. Click **Next**.
6. If needed, change the folder location where PDFlyer should be installed.
7. Click **Next** to accept the default.
8. Click **Install**.
9. Click **Finish**.

Chapter 3

CONFIGURING SCAN

Opening Scan Administrator

To open Scan Administrator, do the following:

1. Select **ProSystem *fx* Scan Administrator** from the *Start* menu.
2. Enter the user name and password for the computer where Scan Administrator is installed.

    Note: When logging in to Scan Administrator, you can use the IP address of the Scan Administrator computer, or the Computer Name. If you expect the IP address to change, we recommend you log in using the Computer Name.

3. Click **Logon**.

Configuring Scan

After installing ProSystem *fx* Scan, use Scan Administrator to configure Scan for your firm. The two major configuration tasks for Scan are:

- **Setting up import folders**. Import folders are the locations where Scan looks for scanned documents to process. Scan monitors the import folders on a continuous basis, processing jobs according to priority levels that you assign. Import folders are created and configured on the *Folder Settings* tab in Scan Administrator. You must set up at least one import folder. Depending on your firm's needs, you may need to create multiple import folders to help organize Scan jobs.
- **Establishing general settings for Scan**. Scan's general settings allow you to control how often Scan checks for jobs, as well as how quickly it begins processing. If your firm processes a high volume of scans, you also may want to use the *Limit Capture* function on the *General Settings* tab to control how many files are processed at once.

Overview of Import, Archive, and Export Folders

The *Folder Settings* tab in the Administrator window is where you manage Scan folders. Scan stores source documents and PDF files in three types of folders:

- **Import folders** are the locations from which Scan retrieves scanned documents for processing. You can use a single default import folder, or you can create additional import folders. The following are examples of how you can categorize your firm's import folders:
  - By scanner
  - By priority
  - By task
  - By staff member
  - By type of client

  If you have more than one import folder, then Scan jobs are processed according to the priority levels assigned to the folders, and then in the order that the folders display on the *Folder Settings* tab. The system administrator can move import folders up and down in the *Folder Settings* list as needed.

  Upon installation, Scan creates a Default 1040 folder and a Default 1041 folder.

  Note: Two different Import folders are created, but the Archive and Export folders are shared.

- **Archive folders** hold the scanned source documents after they are processed by Scan. An archive folder must be assigned to each import folder. A single archive folder can be assigned to all your import folders, or, if your firm processes a lot of scans, you may want to create multiple archive folders.

- **Export folders** contain the final PDF files that are published by Scan. As with archive folders, you must assign an export folder for each import folder. Also, you can choose to use the same export folder for all of your firm's import folders, or you can create multiple export folders to help keep the PDF files organized.

Setting Up an Import Folder

Scan picks up files for processing from the import folders. You must set up at least one import folder when you configure Scan initially. If needed, you can add more import folders at a later time using Scan Administrator.

When you set up the import folder you also must identify the following:

- The OCR, Recognition Settings, and Data Extraction Settings for source documents from this import folder.
- The archive folder where the original scanned source documents from this import folder will be stored after processing.
- The export folder where the PDF files generated from documents in this import folder will be stored after processing.

Scan processes jobs in order of the priority assigned to the import folders, and then in the order that the folders display in on the *Folder Settings* tab. You can move folders up or down in the list to set the order of processing. To move an import folder, select an import folder to move, and then click **Up** or **Down** to position it in the list.

To add and configure an import folder, do the following:

1. Open Scan Administrator on the server or workstation where Scan was installed.
2. Select the **Folder Settings** tab.
3. Click **Add New**.
4. Enter a unique name for the folder that clearly identifies its priority or purpose.
5. Select a priority level that will apply to files in this folder.
6. Select a folder to use as the import folder by doing the following:

    a. Click the **browse button** (...) beside the *Import Folder* field.

    b. Navigate to and select the folder where Scan should pick up files for processing. Keep in mind the following:

      ◆ Each import folder must have a unique path.

      ◆ Import folders must be a valid shared folder (UNC), with access granted to both the administrator and the workstation users who will need to use files in that import folder.

    c. Click **OK** to return to the *Folder Settings* tab.

      Note: If you chose an import folder that is not a shared UNC folder, an **alert icon** (⚠) displays, indicating that you must go back and choose a valid folder.

7. Select a folder to use as the archive for files after they are processed. To setup an archive folder, complete the following:

    a. Click the **browse button** (...) beside the *Archive Folder* field.

    b. Navigate to and select the folder that Scan should use for archiving source documents from this import folder after they are processed. Keep in mind the following restrictions:

      ◆ The archive folder cannot be used as any other type of folder (an import or export folder).

      ◆ If needed, you can use the same archive folder for all source documents, regardless of which import folder the documents came from.

    c. Click **OK** to return to the *Folder Settings* tab.

8. Select **Archive to Subfolders** to create a subdirectory for archive storage. If this option is selected, the source file is moved to a subdirectory in the archive folder after processing.

9. Select a folder to use as the export folder. This folder will hold the final bookmarked PDF files that Scan generates. To setup an export folder, complete the following:

    i. Click the **browse button** (...) beside the *Export Folder* field.

    ii. Navigate to and select the folder where Scan should store the final, bookmarked PDF files that it generates. Keep in mind the following restrictions for export folders:

      ◆ The export folder cannot be used as any other type of folder (import or archive).

      ◆ If needed, you can use the same export folder for all source documents, regardless of the import folder they came from.

    iii. Click **OK** to return to the *Folder Settings* tab.

10. Select **Export to Subfolders** to create a subdirectory for export. If selected, once a Scan job completes, the published PDF file will be moved to a subdirectory in the *Export* folder.

11. Select options for each folder.

    a. Select **Identify and Bookmark** if you want the PDFs created by Scan to be bookmarked automatically. This option must be enabled if you plan to extract tax form information to Tax.

    b. Select **Border Removal** to remove the borders on the margins of the page, regardless of whether or not the border is printed on all four sides of the page.

    c. Select **Enable Files To Be Emailed to CCH** to have the option to send problematic files to the CCH Scan Catalog team for possible inclusion in the Scan Catalog. If selected, newly extracted files can be emailed from the Scan Validation window.

        Note: Your Imported file can also be emailed directly to the CCH Scan Catalog team at scancatalog@wkglobal.com. This file can be located in your Archive folder at:
C:\ProSystem fx Scan\ProSystem fx Scan Shared\Archive

    d. Select **Submit AutoFlow Usage Statistics** to automatically provide CCH with nonsensitive information about how your firm uses ProSystem *fx* Scan.

    e. Choose an option in the *Remove Blank Pages* field to indicate which criteria to use when removing blank pages. Select one of the following:

        ◆ **Disable**. Do not remove any blank pages.

        ◆ **Dirty**. Remove blank pages that are dirty white with speckles or dots.

        ◆ **Very Dirty**. Remove blank pages that are very dirty or have dark creases or staple marks.

        ◆ **Single Line Pages**. Remove blank pages if they contain one visible line of text reading *This Page is intentionally left Blank*.

    f. Select an **OCR** method. *AFR OCR* is the default and recommended method.

    g. Select a **Catalog**. The Catalog controls whether the file is bookmarked as a 1040 or 1041 return.

    h. Select a **Type**. The Type is displayed only for Catalog US1040. This controls the bookmark structure of the published PDF files generated from the import folder. Choose one of the following:

        ◆ **Original** conforms to the original Scan bookmark structure of the 1040 tax return.

        ◆ **Organizer** uses a bookmark structure that conforms to the Tax Organizer.

    i. Select the number **0** for **Auto Rotate** if you do not want the documents in your file to be rotated.

12. Select the extraction option to use for the import folder.

    ◆ **Do Not Extract Data**. No data will be extracted.

    ◆ **Extract Data for AutoFlow**. If this option is selected, you can extract and validate data from jobs scanned into this import folder. This option must be selected if you do not plan to use an extraction cover page or if you want to import extracted data into a Tax return.

    ◆ **Extract Bookmark Names Only**. If this option is selected, you will only be able to extract the bookmarks from the published PDFs.

Note: If you use an Extraction cover page or a Scan cover page, the settings on the cover page will override the options selected here.

13. Click **Save** to save the new import folder.

Note: If you have multiple import folders and you limit the number of files that Scan processes on the *General Settings* tab, reserve the top import folder for rush jobs. This folder should be assigned the *High* priority level. Jobs placed in this folder will be captured and processed first.

Setting Scan Defaults

Scan continually monitors the import folders and starts a new Scan job whenever a new scanned file is detected. The *General Settings* tab in the Administrator window allows you to control how often Scan checks for new files and how many files Scan captures at once. The settings selected on this window apply to all import folders.

Note: The *License Settings* section displays the license information for your installation of Scan. There are no settings to modify in this section.

To modify the Scan general settings, do the following:

1. Open Scan Administrator on the server or workstation where Scan was installed.
2. Select the **General Settings** tab.
3. In the *General Settings* section, change the settings as needed to meet your firm's needs.
   - **Check Every ___ Seconds for New Files to Capture**. This field sets the time lapse before Scan checks for a new file in an import folder. Enter any value between 20 seconds and 600 seconds (10 minutes).
   - **Update Jobs Every ___ Seconds**. This setting determines how often the job information displayed on the Queue tab and Scan Workstation is refreshed. You can set any value between 20 seconds and 600 seconds (10 minutes).
   - **Capture Wait Time ___ Seconds**. This setting is the minimum amount of time that a file must be in the import folder before Scan processes it. You can use the wait time to ensure that a file has not changed in the time that elapses before Scan processes the file. If a file is modified during this wait period, Scan will try to import the file after the wait time has elapsed again.
   - **Limit Capture to ___ Currently Processing Files**. This setting indicates the number of files Scan can process simultaneously. You should set the capture limit high enough to process your normal workload.
     - If you set the number too low and have multiple import folders, jobs in low priority folders or in folders at the end of the *Folder Settings* list may be stalled since higher priority jobs are captured first.
     - If you use this option, reserve the top spot on the import folder list in *Folder Settings* for rush jobs, setting the priority level to *High*. This will ensure that jobs in this folder are processed first.
   - **Show Files Ready to Import**. Select this option if the files waiting to be captured should display in the Queue with a priority of *Ready* and a corresponding message of *File Ready for Import*. This option works correctly if *Limit Capture* is set above zero.

◆ **Enable Files To Be Uploaded To CCH**. Select this to have the option of uploading problematic files to the Scan Catalog team for possible inclusion in the Scan Catalog. If selected, files can be uploaded from the Scan Workstation or the *Scan Validation* window.

4. Click **Save** to apply your changes.

Managing Scan Services

Scan is a collection of services that work together to process your scanned documents. You can start or stop services on the Scan Administrator *Services* tab. You can use this capability to troubleshoot problems or to temporarily suspend all Scan jobs, if needed.

The services included in Scan are as follows:

- **Folder Monitor** monitors import folders for files to be processed. It also updates batch statistics per the Import Status folder.
- **Quality Assurance** detects rotation, skew, and noise in the image and other characteristics necessary for image enhancement prior to form classification.
- **Image Rotation** rotates the images to an upright position prior to form classification.
- **Image Enhancement** deskews, despeckles, and removes blank pages if detected.
- **Border Removal** removes borders on the margins of the page, regardless of whether or not the border is printed on all four sides of the page (if detected).
- **Multi** splits individual pages into distinct documents and jobs based on cover pages. It also splits single and multi-page documents based on target sheets and deletes blank pages and target sheets from the batch. It also deletes the entire batch when completed.
- **AFR OCR** performs optical character recognition on each form. It converts images to text and a single page PDF file for folders set to AFR OCR.
- **ScanSoft OCR** is an alternative OCR service that performs optical character recognition (OCR) on each form. It converts images to text and a single page PDF file for folders set to SS OCR.
- **Image Export** converts images to a single page PDF file and exports them to the Pending folder for processing. This service is used when neither *Identify and Bookmark* nor *Create Searchable PDF* are selected on the Folder Settings tab or in the event of an OCR error.
- **Classification** assigns each document to a predefined template for PDF bookmarking.
- **PDF Export** creates the published PDF file from single page PDF files and creates bookmarks based on the classification. It then exports the published PDF file to the designated export folder.

Configuring Scan Services

Scan Services can run as local system services or as system admin services. By default, all services are set to run as local system services.

- If the import, export, and archive folders are on the same computer with Scan Administrator, the services should be run as local system services.
- If the import, export, and archive folders are located on a computer other than the one where Scan Administrator is installed, then the Folder Monitor and PDF Export Scan services should be run from a system administrator account.

To change the user for the Folder Monitor and PDF Export services, do the following:

1. Right-click **My Computer**.
2. Select **Manage**.
3. Double-click **Services and Applications**.
4. Double-click **Services**.
5. Scroll down to the services listed for ProSystem *fx* Scan, and then scroll to the right until you see a *Log On As* column.
6. Right-click **Folder Monitor**, and then select **Properties**.
7. Click the **Log On** tab.
8. Select **This account**.
9. Enter the user name and password for the administrative account that you want to use.
10. Click **OK**.
11. Repeat steps 7 through 11, this time selecting **PDF Export** instead of Folder Monitor.

Note: You must stop and restart a service after a change has been made.

Configuring Scan Workstation and PDFlyer

After Scan Workstation and PDFlyer are installed on the individual workstations, the staff members who will use these programs can configure the programs for their needs.

Some of the configuration options in Scan Workstation include:

- Setting the Scan Workstation window to be transparent or to always display on top of other windows
- Specifying how often the Scan Workstation window is updated with current job information
- Selecting the default printer that Scan uses to print cover pages and target sheets

Some of the configuration options in PDFlyer include:

- Selecting PDFlyer options that are available upon startup
- Customizing the way your calculator tapes and stamps display
- Setting options that control when warning messages display

Full instructions for configuring Scan Workstation and PDFlyer are including in the *ProSystem fx Scan User Guide*.

Chapter 4

GETTING HELP WITH PROSYSTEM *fx* SCAN

In addition to this guide, you can get additional information about ProSystem *fx* Scan from the following resources:

- **Online Help files**. The ProSystem *fx* Scan help file can be accessed from within the program by selecting **Help > ProSystem *fx* Scan Help Topics** from any Scan window, or by pressing F1 on your keyboard.
- **Knowledge Base**. You can search for answers to specific questions in our CCH Support Knowledge Base at **http://support.cch.com/answers**.
- **Online chat**. Our Scan Support representatives are available to take your questions via live online chat. To use online chat, enter the following Web address in your Web browser: **http://support.cch.com/chat/taxtechsupport**. After entering your name, email address, and account number into the online form, you will be connected to a support representative.
- **Telephone**. You can telephone our support representatives at 1-800-PFX-9998, option 6.

Note: Normal business hours for our Support representatives are 8 a.m. to 7 p.m. CT Monday through Friday. Extended business hours, including some weekends, are available at select times of the year.