Kofax Invoice Automation

Installation Guide
Version: 6.0.2

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KOFAX

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Preface

This guide contains essential information and procedures that you need to successfully install Kofax Invoice Automation.

This guide assumes that you have a thorough understanding of Windows standards, applications, and interfaces.

Related documentation

A full set of the documentation can be found online here: https://docshield.kofax.com/Portal/Products/en_US/RSI/6.0.0-gv9m3oh6jr/RS_Invoices.htm

In addition to this guide, the Kofax Invoice Automation documentation set contains the following relevant documents:

System Configuration Guide

KIA_Technical_Specifications.pdf contains pertinent information about system configuration and requirements.

FLEXlm Installation Guide

KIA_FLEXlm_Installation_Guide.pdf contains pertinent information about requirements for and installing the FLEXlm license server.

Kofax Invoice Automation on Microsoft SQL Installation Guide

KIA_SQL_Server_Installation_Guide.pdf contains pertinent information about installing Microsoft SQL server in connection with Kofax Invoice Automation.

Kofax Invoice Automation on Oracle Installation Guide

KIA_Oracle_Server_Installation_Guide.pdf contains pertinent information about installing Oracle server in connection with Kofax Invoice Automation.

Offline documentation

If you require offline versions of the documentation, you can download them from the Kofax Electronic Fulfillment (KEF) site: https://services.kofax.com/support/files/kef/Downloading%20Software%20from%20the%20Kofax%20Electronic%20Fulfillment.pdf.

Chapter 1

Overview

This guide contains instructions to help you install Invoice Automation 6.0.2. For information on how to use Invoice Automation, see *Invoice Automation Help.*

This guide is divided into multiple sections. Review the descriptions of each section below to determine which steps you need to take to install Invoice Automation.

Preparation – (Required reading) This section describes important steps that must be taken before installing Invoice Automation.

Creating an Invoice Automation database – (Required procedure for new installations) This section is not required if you are upgrading from a previous version of Invoice Automation.

Installing Invoice Automation in a network – (Optional procedure for network installations) This section contains optional, timesaving procedures for installing Invoice Automation on serveral computers in a network.

Command-line installation – (Optional procedure for advanced users only) This section may be helpful in large systems where a significant number of repetitive installations need to be performed.

Installing Invoice Automation – (Required for all installations) This section describes how to install Invoice Automation.

Installing drivers for scanner interfaces – (Required procedures for new installations) This and the previous section describe which scanner drivers are required depending on the scanner and scanner interface used. This section must be followed in new Invoice Automation installation on workstations where scanning will be done.

After installation – (Recommended reading) This section contains general information you need to know about Invoice Automation.

Troubleshooting – (Optional reading) This section helps you if you have problems with your installation.

Installation process quick overview

To install Invoice Automation, follow these procedures in this order:
1. Preparation.
2. Create an Invoice Automation database (new installations only). This can also be done after Invoice Automation is installed.
3. Install Invoice Automation
4. Install the license manager (FLEX*lm*).

Chapter 2

Preparation

Invoice Automation is easy to install on a local computer or in a network with one or more scanners connected. The installation program on the CD provides instructions during installation.

Before you install Invoice Automation:

- Refer to the *Invoice Automation System Configuration Guide* for important information about hardware, software, and network requirements, and for scanner setup information.
- If you have a previous installation of Invoice Automation, read "Upgrading Invoice Automation," below.
- If Invoice Automation will be used in a network, read "Installing Invoice Automation in a network."

    Important: Before installing Invoice Automation, make sure that Windows Update is not installing automatic updates in the background. You can do one of the following:

    Install all the Windows patches before installing Invoice Automation.

    Temporarily disable automatic updates during the Invoice Automation installation.

Upgrading Invoice Automation

Kofax strongly advises customers against upgrading to Invoice Automation 6.0.2 themselves, due to significant changes in the database and initialization files. Upgrades should be performed by knowledgeable Kofax personnel or certified Kofax partners. A separate internal document, *Invoice Automation Upgrade Guidelines*, is available to guide those performing upgrades. When an upgrade is done, it should be done in this order:

1. Backup the Invoice Automation and Collector databases.
2. Uninstall Collector.
3. Uninstall Invoice Automation.
4. Uninstall Invoice Automation X.X Mergemodules.
5. Install Invoice Automation 6.0.2.
6. Install Collector 6.5.0.4.
7. Upgrade the Collector database using the Database Maintenance Tool provided.

Do you need to reinstall or "repair" Invoice Automation 6.0.2?

If you run the Repair option after installing Invoice Automation 6.0.2, certain settings from Eiglobal.ini and Eilocal.ini are not retained. Therefore, back up those files before running Repair.

Chapter 3

Creating an Invoice Automation database

Your database server must be running before you can create an Invoice Automation database. Do not confuse the Invoice Automation database with the database server. A database server is a platform needed to install a database. Invoice Automation's database then allows the program to interact with the database server.

You only need to create an Invoice Automation database once. If you install Invoice Automation on multiple computers in a network, you do not need to create a new database for each installation.

Note: You must have system administrator rights on the computer when you create the database.

SQL Server instructions

For instructions on setting up SQL Server and creating the Invoice Automation database, see *Installing and Configuring Microsoft SQL Server*, a Kofax document that is available in the Documentation folder of the installation package. That document describes how to install SQL Server and create the Invoice Automation database.

Oracle instructions

For instructions on setting up Oracle, creating the Invoice Automation database, and creating the database tables used by Invoice Automation, see *Installing and Configuring Oracle*, a Kofax document that is available in the Documentation folder of the installation package.

Installing Invoice Automation in a network

Invoice Automation can be installed in a variety of networks. The most common way of running the program with multiple users/workstations is to install the database on a shared database server.

Normally, the database does not require operator intervention. However, if there is a power failure, or if an Invoice Automation process is terminated unnaturally for any other reason, the database server or the databases themselves can become corrupt. In most cases, the database server handles such situations, and you need only restart Invoice Automation.

Some of the folders and files created during installation are later shared by all workstations. Therefore, you need to:

1. Create those shared folders and files during the first installation.

2. In subsequent installations, exclude the "global files" and instead *specify the path* to them.

These procedures are explained in detail below.

The first installation – place shared objects in a globally available folder

1. To install the shared files (Eiglobal.ini, Ehcharset.ini, and country profiles) in a different location, expand Folders and select Global folder:
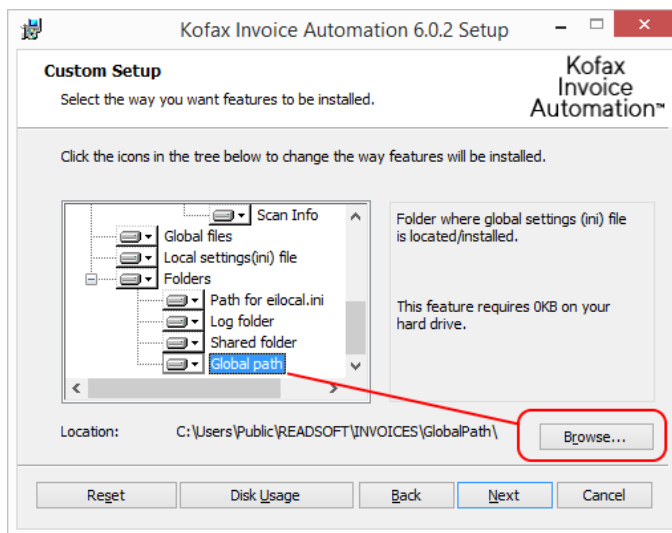
2. Click Browse and specify a location in the dialog that is displayed
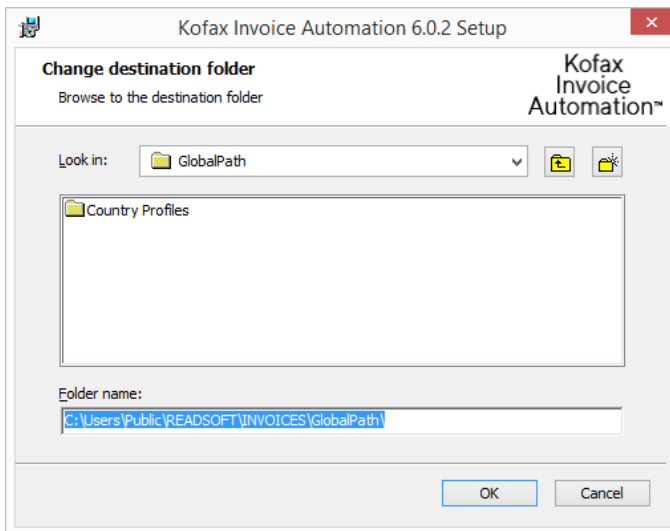
Specify the parent folder (such as GlobalPath).

3. Optional: Click Shared folders and then Browse to specify a different location for these items, as well (that is, the object and its corresponding setting that is affected in eilocal.ini.:

Batch paper layouts – BatchPaperDir

Color images – ColorImageArchivePath

Event maps – eventMapDir

Images of scanned invoices – Images

Statistics saved to file after running a job – StatLogPath

Transfer files default directory – TransferFiles

Here, too, specify the parent folder (such as Invoice Automation), not the actual folder for the items.

(Changing the location of log files is not recommended. Store log files locally.)

4. After installation is complete, check the resulting Eilocal.ini file to ensure that all paths are set correctly.

5. Ensure that the folders you specified for Global path and Shared folders are shared if you are using a central location for those items.

Subsequent installations – exclude shared files, and specify the path instead

This section describes how to manually install Kofax Invoice Automation 6.0.2 on subsequent workstations. You could instead perform automated workstation installations as described in the next section.

1. Exclude Global files from the installation:
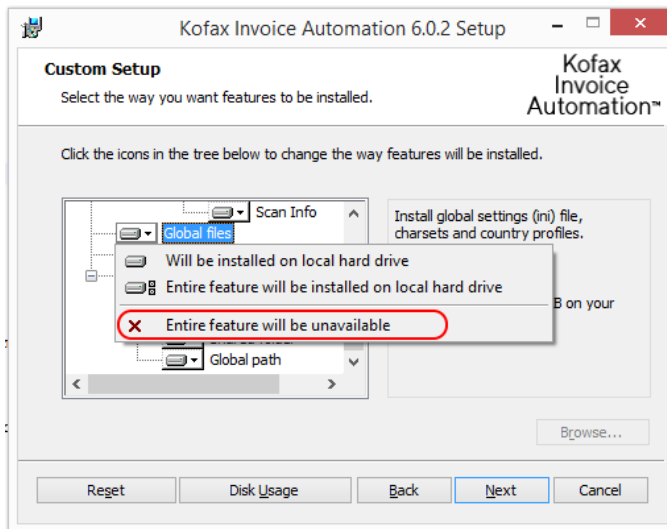
Contrary to the statement in the GUI, the global files will not actually be unavailable. In the next steps, you will "link" to centrally located files instead of installing them locally.

2. Expand Folders and select Global path:
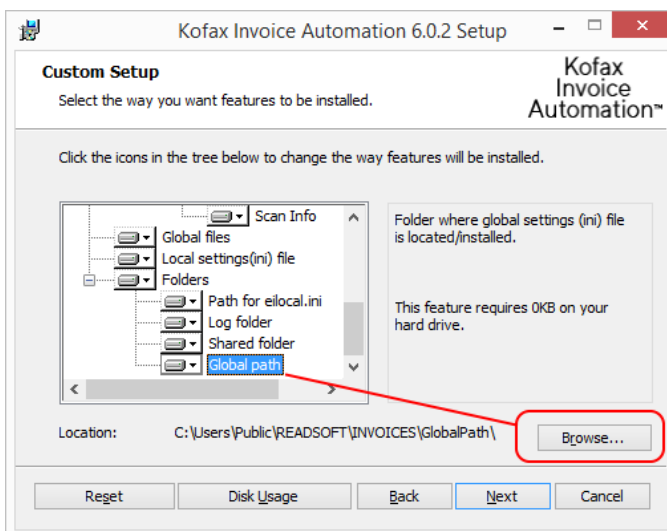
3. Click Browse and specify the previously configured shared location:
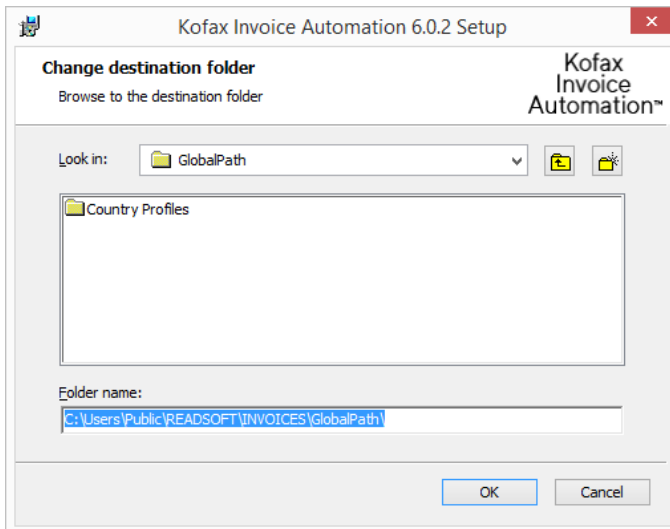
Specify the GlobalPath folder where the global fies and country folders are located.

4. Optional: As in the initial installation, you can click Shared folders and then Browse to specify a different location (including a shared location) for other items, as well. (See step 3 in "The first installation – place shared objects in a globally available folder")

5. After installation is complete, check the resulting Eilocal.ini file to ensure that all paths are set correctly.

Chapter 5

Command-line installation

This section describes how to perform a command-line installation of Invoice Automation 6.0.2.

Using silent mode may be helpful in large systems where a significant number of repetitive installations need to be performed. However, due to the complexity of the possibilities, silent installation should only be used by advanced installers that are very familiar with the process. Using this mode, no dialogs (or very few) are displayed during installation, and problems can arise if the command line, which can be very long, is not written exactly.

Important A full installation should be completed first at a main workstation to establish database connections, global path, etc.

Command line parameters

This section describes the command line parameters that are used to install Invoice Automation when using these options:

The EXE file (full installation of all necessary features).

The MSI file (Invoice Automation core files only)

Command line parameters when Installing Invoice Automation using the EXE file

"Kofax Invoice Automation 6.0.2 Installation.exe" /qb! – Invoice Automation is installed, and the most basic user interface is shown during the process.

"Kofax Invoice Automation 6.0.2 Installation.exe" /qn – Invoice Automation is installed, and no user interface is shown during the process.

"Kofax Invoice Automation 6.0.2 Installation.exe" /uninstall /qb – Invoice Automation is uninstalled, and a basic user interface with a Cancel button is shown during the process.

"Kofax Invoice Automation 6.0.2 Installation.exe" /log "c:\setup.log" – Invoice Automation is installed, and a "verbose" (detailed) log of the installation is created on C:\.

"Kofax `Invoice Automation 6.0.2 Installation.exe`" may need to be adjusted to the path where the file is located, depending on where the command is executed from.

EXE switches:

/? = all available switches

/install = install (default – no need to specify)

/uninstall = uninstall

/q = completely silent installation (not even status information is displayed)

/qb! = basic user interface with no Cancel button

/qb = basic user interface with Cancel button

/qn = no user interface displayed

/log = a log file is created as specified (see example above and below)

Parameters must be separated by a space, as shown in this example:
"Kofax Invoice Automation 6.0.2 Installation.exe" /uninstall /qb! /log "C:Log\install.log"

Command line parameters when Installing Invoice Automation using the MSI file

"`msiexec`.exe" /i "Kofax Invoice Automation 6.0.2.msi" /qb! – Invoice Automation is installed, and the most basic user interface is shown during the process.

"`msiexec`.exe" /i "Kofax Invoice Automation 6.0.2.msi" /qn – Invoice Automation is installed, and no user interface is shown during the process.

"`msiexec`.exe" /i "Kofax Invoice Automation 6.0.2.msi" /qb – Invoice Automation is uninstalled, and a basic user interface with a Cancel button is shown during the process.

"`msiexec`.exe" /i "Kofax Invoice Automation 6.0.2.msi" /l*v "c:\setup.log" – Invoice Automation is installed, and a "verbose" (detailed) log of the installation is created on C:\. If you do not provide a path, the log is saved to the same location as Kofax Invoice Automation 6.0.2.msi.

"`msiexec`.exe" /p "Kofax Invoice Automation 6.0.2 PatchX.msi" – An Invoice Automation patch is installed.

"Kofax Invoice Automation 6.0.2.msi" needs to be adjusted to the path where the file is located, depending on where the command is executed from:

MSI switches:

/? = all available switches

/i = install (default – no need to specify)

/p = the specified patch is installed

/x = uninstall

/s = completely silent installation (not even status information is displayed)

/qb! = basic user interface with no Cancel button

/qb = basic user interface with Cancel button

/qn = no user interface displayed

/l = a log file is created as specified (see example above and below)

Parameters must be separated by a space, as shown in this example:
msiexec.exe "Kofax Invoice Automation 6.0.msi" /x /qb! /l*v "C:Log\install.log"

How to change the installation folder

By default, Invoice Automation is installed in C:\Program Files (x86)\ReadSoft\Invoices, and

the OCR engines are installed in C:\Program Files (x86)\Readsoft\engines. However, you can change the installation folder if you need to.

The installation (EXE) file for Invoice Automation is found in the *Installation* folder of the installation package, and the installation (MSI) files for the OCR engines are located in the *Installation/engines* folder.

Use the following syntax in the cmd window to change the folders where the programs are installed. The example syntax would change the installation folders to the specified location on the e:\ drive:

Start with OmniPage and ABBYY.

"OmniPage Ultimate 19.20.msi" /qn OMNIPAGE_19_20="e:\readsoft\engines\omnipage"

"ABBYY FineReader 10.5.msi" /qn ABBYY_10_5_0_58="e:\readsoft\engines\abbyy"

Install Invoice Automation last:

".\Kofax Invoice Automation 6.0.2 Installation.exe" /s INSTALLDIR=e:\readsoft\invoices

Note that the OCR engines are not only used by the Interpret module!

Partial installation

Only those features (read Invoice Automation program modules) that are desired can be installed using ADDLOCAL in the command line. This can be used on production workstations on which the Manager or other modules are not necessary, for example, workstations that are dedicated to scanning or interpretation.

Requirements

A partial installation of Invoice Automation can be made by running Kofax Invoice Automation 6.0.2.msi or Kofax Invoice Automation 6.0.2 Installation.exe. If installation is performed with the *.msi package, only core Invoice Automation files can be installed (such as individual modules or INI configuration files). In this case to be able to run Invoice Automation correctly after installation, you will also need to install:

mdac_typ.exe

SharedManagementObjects.msi

SQLSysClrTypes.msi.msi

vs_piaredist.exe

These files are all included with the Invoice Automation software in the \INVOICES\common\ folder. You will also need to install the Kofax Invoice Automation 6.0.2 Mergemodules.msi located in the \INVOICES \invoices\ folder.

If Interpret, Verify, Transfer or Optimize modules are installed you will also need to install the interpretation engines located in the \INVOICES\engines\ folder;

ABBYY FineReader 10.5.msi

OmniPage Ultimate 19.20.msi

If installation is performed with the *.exe, all necessary prerequisities to run Invoice Automation will be installed together with the features that you specify (see next section).

Available features

These "features" can be specified individually for installation in the command line:

- All – installs everything
- GeneralFiles – installs the required Invoice Automation core files – required*
- Folders – creates folders required by Invoice Automation – required*
- Globalfiles – installs Eiglobal.ini, Ehcharset.ini, and country profiles – optional (not normally used when installing client workstations in a network)
- LocalFiles – installs `Eilocal.ini` – required*
- Applications – installs all modules
- Manager – optional
- Scan – optional
- Interpret – optional
- Verify – optional
- Transfer – optional
- Optimize – optional
- PMWebFeature – optional. Installs the "Services Web Dashboard"
- InvoiceRules – optional. Installs the InvoiceRules plugin.
- ScanInfo – optional. Installs the ScanInfo plugin.
  RemoteScanImporter – optional. Installs the RemoteScanImporter plugin.

* These features must be included in all installations to install components that are common and necessary to all program modules.

Important The names of the features are case sensitive. Write them exactly as indicated above.

Selecting features using the command line

Individual features are added to the installation using this syntax:

MSI:

```
msiexec.exe /I Kofax Invoice Automation 6.0.2 Installation.msi" /s
```

```
ADDLOCAL="GeneralFiles,Folders,Manager,LocalFiles"
```

EXE:

```
"Kofax Invoice Automation 6.0.2 Installation.exe" /qn
```

```
ADDLOCAL="GeneralFiles,Folders,Manager,LocalFiles"
```

In this example, the required GeneralFiles and Folders are installed, as well as the optional Manager and Optimize. Note that there are no spaces in the string:

```
ADDLOCAL="GeneralFiles,Folders,Manager,Optimize,LocalFiles"
```

Available properties

These properties can be specified on the command line for both full and partial installations.

For a partial installation, add the property to the command line after the features, like this:

MSI:

```
Msiexec.exe /I "Kofax Invoice Automation 6.0.2 Installation.msi" /s
```

```
ADDLOCAL="GeneralFiles,Folders,Interpret,LocalFiles" SHAREDFOLDER=C:\temp
```

EXE:

```
"Kofax Invoice Automation 6.0.2 Installation.exe" /qn
```

```
ADDLOCAL="GeneralFiles,Folders,Manager,LocalFiles" SHAREDFOLDER=C:\temp
```

Important Leave a single space between features and properties. See also "Specifying a path that includes a space."

The SHAREDFOLDER property

The SHAREDFOLDER property specifies the main path where many Invoice Automation objects will be located, affecting these settings in the [Directory] section of Eilocal.ini file:

Setting in Eilocal.ini	Result	Example setting in Eilocal.ini (SHAREDFOLDER=C:\Temp)
Images	<*path*>\Images	Images=C:\temp\Images
TransferFiles	<*path*>\Transfer	TransferFiles=C:\temp\Transfer
BatchPaperDir	<*path*>\BatchPaperDir	BatchPaperDir =C:\temp\ BatchPaperDir
StatLogPath	<*path*>\Stat	StatLogPath=C:\temp\Stat
ColorImageArchivePath	<*path*>\ColorImg	ColorImageArchivePath =C:\temp\ColorImg
EventMapDir	<*path*>\Evmap	EventMapDir=C:\temp\Evmap

Example using SHAREDFOLDER in a full installation:

"Kofax Invoice Automation 6.0.2 Installation.exe" /qn SHAREDFOLDER=C:\temp

As mentioned above, for a partial installation, add the property to the command line after the features, like this:

MSI:

Msiexec.exe /I "Kofax Invoice Automation 6.0.2.msi" /s ADDLOCAL="GeneralFiles,LocalFiles,Folders,Interpret" SHAREDFOLDER=C:\temp

EXE:

"Kofax Invoice Automation 6.0.2 Installation.exe" /qn ADDLOCAL="GeneralFiles,LocalFiles,Folders,Interpret" SHAREDFOLDER=C:\temp

The GLOBALFOLDER property

The GLOBALFOLDER property is commonly used when installing client workstations in a network installation of Invoice Automation. It specifies the location of Eiglobal.ini, Ehcharset.ini, and country profiles (Eiglobalextra.ini files), affecting this setting in the [Directory] section of Eilocal.ini file:

Setting in Eilocal.ini	Result	Example setting in Eilocal.ini (GLOBALFOLDER=C:\Temp)
GlobalPath	<path>\GlobalPath	GlobalPath=C:\temp\GlobalPath

"Kofax Invoice Automation 6.0.2 Installation.exe" /qn ADDLOCAL="GeneralFiles,Folders,LocalFiles,Verify" GLOBALFOLDER="\\myserver\globalpath"

The LOCALFOLDER property

Use this property to specify where to put EILOCAL.

```
"Kofax Invoice Automation 6.0.2 Installation.exe" /qn LOCALFOLDER=D:\ReadSoft\INVOICES
```

```
Msiexec.exe /I "Kofax Invoice Automation 6.0.2 Installation.msi" /qb
 ADDLOCAL="GeneralFiles,Folders,Interpret" LOCALFOLDER=D:\ReadSoft\INVOICES
```

The LOGFOLDER property

The LOGFOLDER property specifies where log files are to be saved, affecting this setting in the [Directory] section of Eilocal.ini file:

Setting in Eilocal.ini	Result	Example setting in Eilocal.ini (LOGFOLDER=C:\Temp)
LogFile	<path>\Log	LogFile=C:\temp\Log

If you do not include the LOGFOLDER property on the command line, the default log path is used.

The INSTALLDIR property

Use this property to specify where to install Invoice Automation.

Example using INSTALLDIR in a full installation:

"Kofax Invoice Automation 6.0.2 Installation.exe" /qn INSTALLDIR=D:\ReadSoft\INVOICES

Example using INSTALLDIR in a partial installation:

Msiexec.exe /I "Kofax Invoice Automation 6.0.2.msi" /qb
ADDLOCAL="GeneralFiles,Folders,Interpret,LocalFiles" INSTALLDIR=D:\ReadSoft\INVOICES

Specifying a path that includes a space

As stated above, there must be a single space between features and properties.

If a space also occurs someplace else (in a path, for example), that part must be enclosed by quotation marks ("), like this:

msiexec.exe /I "Kofax Invoice Automation 6.0.2 Installation.msi" /qb
ADDLOCAL="GeneralFiles,LocalFiles,Folders,Interpret" SHAREDFOLDER="C:\my temp\"

In this example, there is a space between "my" and "temp", which is why C:\my temp is enclosed as shown above.

Other properties that can be set from the command line

SERVER = SQL Server or Oracle (SQL Server is default).

DATABASE_SERVER = The name of the computer on which the database server is located (SQL) or the Net Service Name of the Kofax Invoice Automation database (Oracle).

DBNAME = The SQL database name.

DBUSERNAME = User name with Admin privileges.

DBUSERPWD = Password to the above user name.

SCANCARD = SCSI or KOFAX (SCSI is default)

APPGUILANGUAGE = GUI language.

Installing Invoice Automation 6.0.2

Download the Invoice Automation 6.0.2 installation files

1. Navigate to the Kofax Customer Portal.
2. In the downloads page, search for all items relevant to Invoice Automation 6.0.2, and download them to a temporary folder on your computer.

Installing the Invoice Automation software

During the installation procedure, you are prompted to answer some questions. In most cases, you can click Next to use the default settings.

Warning: If you have a prior version of Invoice Automation installed, read "Upgrading Invoice Automation" before installing the new version.

Note that Invoice Automation requires Microsoft .NET 4.7.2 or later to work.

The contents of the Invoice Automation installation package is available under the *Installation* folder in the following folder structure:

📁 Installation
   📁 common
   📁 database setup
   📁 documentation
   📁 engines
   📁 flexlm
   📁 invoices
   📁 plugins
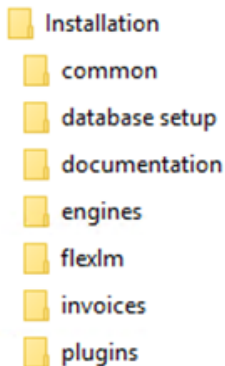
1. To install Invoice Automation, go to the temporary folder where the installation package is found, and in the Invoice Automation folder, open Kofax Invoice Automation 6.0.2. Installation.exe.
2. The installation setup starts. Press **Install** to continue.
3. If not already installed, the installation programs for both OmniPage Ultimate 19 (for Kofax products) and ABBYY FineReader 10.5 (for Kofax products) are presented so that they can be installed. Specify the installation location(s) and keep the default options.

4. Click **Next** when the **Welcome** dialog is displayed. The license agreement is displayed.

5. Carefully read the license agreement. If you agree with the terms, select **I accept...** and click **Next** to proceed with the installation.

6. Enter the required information In the **Database Access** dialog:

    Server Type – MSSQL or Oracle

    Database server – The name of the computer on which the database server is located (SQL) or the Net Service Name of the Invoice Automation database (Oracle).

    Database name – The name of the Invoice Automation database.

    Database user login – The user login needed to access database server.

    Database user password – The user password needed to access the database server.

    Click **Next** to continue

7. Select the type of scanner interface you use, and select a language for the user interface. Click **Next** to continue.

8. Customize settings such as the following:

    Which modules are installed.

    Where to install them

    Where various objects are to be saved or found by default–for a network installation, for example.

    Note that the Services Web Dashboard and Plugins are not selected by default. They must be selected manually to include them in the installation.

    Click **Next** to continue.

9. Click **Install** to begin copying the program files. When the installation is complete, click **Finish**.

Notes:

*   Normally the setup program will prompt you if you need to restart the computer before using Invoice Automation. However, you can also get an error message when you start a module, stating that Eilocal.ini cannot be found. Restart the computer if that happens.

*   During installation in addition to OmniPage Ultimate 19 and ABBYY FineReader 10.5, the following programs or components that Invoice Automation is dependent on are installed automatically. They are added to the computer's Programs and Features list and can be uninstalled separately from there if needed.

    *   Kofax Invoice Automation 6.0.2 Installation
    *   Kofax Invoice Automation 6.0.2 Mergemodules
    *   Kofax Invoice Automation 6.0.2

To uninstall everything at once, click Kofax Invoice Automation 6.0.2 Installation and select Uninstall.

Installing the license manager (FLEX*lm*)

We recommend that users running Invoice Automation in a network install a license manager on one computer. The Flexible License Manager (FLEX*lm*) makes Invoice Automation available anywhere on a network.

For installation instructions, see *Installing FLEXlm for Invoice Automation*, a Kofax document that is available in the installation package.

If you are upgrading from a version of Invoice Automation prior to Invoice Automation 5-4, you must reinstall FLEX*lm*. This procedure is also explained in the above document.

For any other information about FLEX*lm*, contact your Kofax Kofax representative.

Installing Collector

Collector 6.5 can be installed with Invoice Automation to add input possibilities using email or XML invoices.

For installation instructions, see *ReadSoft Collector Installation and Quick start guide.pdf*.

Kofax VRS for scanning

Kofax VRS can be used together with Invoice Automation for all scanning requirements. Starting with Kofax Invoice Automation 6.0, how the program communicates with VRS has changed, and Invoice Automation now supports all of the scanners supported by VRS. Consequently, we recommend buying a scanner that already includes VRS. Otherwise, you can purchase it from Kofax VRS Elite Support > Downloads found at https://services.kofax.com/support/products/vrs/5.1/downloads.php.

After installation

Eilocal.ini

The settings for each workstation are saved in the Eilocal.ini file. The settings are made during installation and normally do not require manual changes. Do not change these entries unless you are sure they need to be changed, and you know how to change them.

The default location of this file: C:\Users\Public\ReadSoft\INVOICES

Eiglobal.ini

Settings that are applied to all workstations in an installation, for example shared paper sizes, are saved in Eiglobal.ini. The settings are made during installation and normally do not require manual changes.

The default location of this file: C:\Users\Public\ReadSoft\INVOICES

Note: From Invoice Automation 5-4 SP1 and onward, the database password is encrypted by default. If you upgrade from a version prior to Invoice Automation 5-4 SP1 and choose to copy the Password setting from the old Eiglobal.ini file to the new one, you must also change EncryptedPassword to 0. Since UseEncryptedPassword is set to 1 by default, Invoice Automation then encrypts the value in the Password setting the first time a module is started, and sets EncryptedPassword to 1 to indicate that the password is now encrypted.

Ehcharset.ini

Ehcharset.ini contains character sets and other settings for interpretation. Invoice Automation uses the character set for the language listed for DefaultCharSet in Eiglobal.ini.

The default location of Ehcharset.ini: C:\Users\Public\ReadSoft\INVOICES

See *Invoice Automation Help* for more information about Ehcharset.ini.

User authorization

Invoice Automation has a user authorization system that is enabled by default. The default user "admin" can be deleted once you set up your own users. The password for admin is "secret".

To enable or disable user authorization, select User authorization on the Settings menu in Manager. When user authorization is enabled for a module, a user who starts the module must be authorized to do so. There are two types of user authorization:

1. **Local user** – Invoice Automation' built-in system to control user access. Users must enter a user name and password to log in to the module. Enabled by default.

2. **Network authentication** – Uses Microsoft Windows users and groups to control access to Invoice Automation.

Which type of authorization specific users use is set in their user profile. You define users using the Users object bar in the Manager module.

All of this is explained in detail in *Invoice Automation Help*.

Setting up Windows users and user groups

As one part of configuring your network, you can create a unique Windows user name for each Invoice Automation user and include the users in Invoice Automation-oriented groups. This is useful when the volume of invoices is high.

Including users in program-oriented groups requires system administration knowledge. Refer to Windows online help for further information about user names and groups.

Benefits

- Permissions can be used to prevent unauthorized users from accessing sensitive data on shared Invoice Automation network resources.
- You can use VBA and batch files to make Invoice Automation report to users. Example:

```
OnJobNoMoreInvoices: Shell NoMoreInvoices.bat
```

```
Contents of NoMoreInvoices.bat: c:\>net send administrator "Transfer module number 2
 has no more invoices available."
```

Recommended procedure

- Create a unique Windows user name for each user who will work with Invoice Automation.
- Create six groups of users that correspond to the six different Invoice Automation modules, as shown in the table below.
- Include each user in one or more of these groups, assigning the permissions recommended in the table, depending upon the user's role in the Invoice Automation system.
  The permissions are:
  - R (Read)
  - W (Write)
  - D (Delete)
  - Change (All permissions)

Path name	Manager group	Scan group	Interpret group	Verify group	Transfer group	Optimize group

Path name	Change	R	R	R	R	R
Programs	Change	R	R	R	R	R
LogFile	Change	RW	RW	RW	RW	RW
Images	Change	RW	R	R	RD	R
TransferFiles	Change	R	R	R	RWD	R
BatchPaperDir	Change	R	R	R	R	R
ColorImageArchivePath	Change	R	R	R	R	RWD
EventMapDir	Change	R	R	R	R	R

Default path for each setting

Each setting below is followed by the default path in the respective operating systems.

GlobalPath

C:\Users\Public\ReadSoft\INVOICES

Programs – C:\Program Files\ReadSoft\INVOICES\Bin

LogFile

C:\Users\Public\ReadSoft\INVOICES\Log

Images

C:\Users\Public\ReadSoft\INVOICES\Images

TransferFiles

C:\Users\Public\ReadSoft\INVOICES\Transfer

BatchPaperDir

C:\Users\Public\ReadSoft\INVOICES\Bin

ColorImageArchivePath

C:\Users\Public\ReadSoft\INVOICES\ColorImg

EventMapDir

C:\Users\Public\ReadSoft\INVOICES\Evmap

Note: In 64-bit operating systems, for each of the paths mentioned above, the default path is: C:\Program Files (x86)\ReadSoft\INVOICES\...

Back up the Invoice Automation system

To protect your installation from damage caused by power failure, disk crashes, software errors, incorrect user changes, and so on, it is important to set up routines for backing up program and data files. Please see recommendations and instructions in the *Invoice Automation System Configuration Guide*.

Chapter 9

Troubleshooting

If Invoice Automation does not work after installation, make sure you have followed the instructions in the *Invoice Automation Readme*.

Conflicts with anti-virus programs

If possible, it is recommended to deactivate anti-virus software on all Invoice Automation workstations and servers, and instead use a centralized virus scanning method.

If you must run Invoice Automation on a PC that also runs an anti-virus program, you may need to configure it to recognize Invoice Automation and FLEX*lm* as "friendly" programs. At the very least, ensure that Invoice Automation INI files are excluded from virus scanning. Otherwise invoice processing time can increase drastically.

The procedure depends on your anti-virus program and is outside the scope of this document.

"Cannot find Eilocal.ini" when starting Invoice Automation

Normally the setup program will prompt you if you need to restart the computer before using Invoice Automation. However, it can also happen that you get an error message when you start a module, saying that Eilocal.ini cannot be found. Restart the computer if that happens.

Confirm that the program is installed correctly

To confirm that Invoice Automation is installed correctly:

1. After you have prepared Invoice Automation for production, start an Interpret job and interpret one of the sample invoices provided in the program's Samples\Images directory.
2. After the Interpret job is finished, exit Interpret and run Verify.
3. Open the **Inbox** and make sure the interpreted invoice is displayed in one of the **Inbox** folders.
4. You can now delete the invoice from the database by selecting **Clear databases** in the Manager's **Administration** menu. When asked what you want to delete, select **Invoice definitions & invoices**.

Problems with installations

If an installation fails, restart the installation from the command line, using the /l switch described in "Command line parameters when Installing Invoice Automation using the MSI file" to create a log. Then check the log for details about what went wrong.

Confirm that the program works with your scanner

After you ensure that Invoice Automation is installed correctly, start a Scan job and scan at least one invoice. Ensure that the image looks correct and that the scanner starts and stops on command.

Scanner problems

If you are using a Kofax Adrenaline interface, Invoice Automation always tries to scan using the scanner selected as the "default" scanner in the Kofax Scanner Manager utility (KSM, found on the Control Panel). Ensure that your scanner is set as the default scanner before scanning with Invoice Automation.

If you are using a scanner with a SCSI or FireWire interface and it does not appear in the Windows Control Panel, or if you are having trouble connecting to the scanner, try installing ASPI32 version 4.70 or later.

Note: If the card is installed before you install ASPI32, the ASPI32 installation will fail.

For more information about installing your scanner card, see the instructions supplied with it.

Port connection problems on some operating systems

Because of the built-in firewall, some operating systems prevent some Kofax products, or products with which they are integrated, from working properly:
- Microsoft Windows 7
- Microsoft Windows 8
- Microsoft Windows 10

If you encounter problems, please see *Resolving issues with built-in firewall* section of the Invoice Automation System Configuration Guide, which is available in the Documentation folder in the Invoice Automation' installation package and in Invoice Automation' root directory after installation. The file name is Invoice Automation System Configuration Guide Eng.pdf.

Restore the system after a failure

Please see instructions in the *Invoice Automation System Configuration Guide*.

Where to find more information

If other types of problems occur, refer to the troubleshooting topics in *Invoice Automation Help* first.

You can access help even if Invoice Automation is not running. Browse to Invoice Automation' C:\Program Files\ReadSoft\INVOICES\Bin folder and double-click the INVOICES5-ENG.CHM file.

Depending on which language version you installed, other versions of *Invoice Automation Help* might also be available, such as INVOICES5-FRA.CHM (French version), INVOICES5-GER.CHM (German version), and INVOICES5-ESP.CHM (Spanish version).

If problems persist, contact your Kofax representative.