

# Kofax ReadSoft Collector

## Installation Guide

Version: 6.5.0.11

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent blue color throughout.

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# Preface

This document guides you through the installation of Kofax ReadSoft Collector 6.5.0.11 in connection with Kofax ReadSoft Invoices 6.1 or later.

**Note** Although the intention of this guide is to describe the process to implement and configure all of the required components in as much detail as possible, certain Windows information dialogs may appear that are not covered. If no information is specifically provided, select the default options or choices that are appropriate to company policy and personal judgment.

## Related documentation

The product documentation set for Kofax ReadSoft Collector is available at the following location:

[https://docshield.kofax.com/Portal/Products/en\\_US/RSC/6.5.0-e85tsx62sy/RS\\_Collector.htm](https://docshield.kofax.com/Portal/Products/en_US/RSC/6.5.0-e85tsx62sy/RS_Collector.htm)

In addition to this guide, the documentation set includes the following items:

- *Kofax ReadSoft Collector Customization Guide*: Describes how to customize ReadSoft Collector and create and manage ReadSoft Collector plugins.
- *Kofax ReadSoft Collector Integration Specification Guide*: Describes how ReadSoft Collector's XML logic handles the supported XML standard formats.
- *Kofax ReadSoft Collector SmartXML Guidelines for XML Standards*: Describes how to work with Kofax ReadSoft Invoices XML standards in connection with ReadSoft Collector.
- *Kofax ReadSoft Collector Database Maintenance Tool Help*: Describes how to create and maintain ReadSoft Collector database.
- *Kofax ReadSoft Collector Help*: Describes how to configure and maintain ReadSoft Collector.

## Get help with Kofax products

The [Kofax Knowledge Base](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the [Kofax website](#) and select **Support** on the home page.

**Note** The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.  
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details, and documentation including release news.  
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).  
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).  
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.  
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

## Access ReadSoft documentation

By default, the Kofax ReadSoft Collector documentation is available online. However, if necessary, you can also download the documentation to use offline.

### Online documentation

The product documentation for ReadSoft Collector 6.5.0.11 is available at the following location:

[https://docshield.kofax.com/Portal/Products/en\\_US/RSC/6.5.0-e85tsx62sy/RS\\_Collector.htm](https://docshield.kofax.com/Portal/Products/en_US/RSC/6.5.0-e85tsx62sy/RS_Collector.htm)

### Offline documentation

To access the documentation offline, download the documentation .zip files from the [Kofax Fulfillment Site](#) and extract them on a local drive available to your users. The offline documentation package includes help in the following languages:

- English (EN)
- French (FR)
- German (DE)
- Spanish (ES)

## Chapter 1

# Installation

## System requirements

This section provides the requirements that must be met to ensure production quality and speed. The following requirements are based on the assumption that Kofax ReadSoft Collector and Kofax ReadSoft Invoices are the only programs running on the workstation or server. If you wish to run other programs at the same time, make sure that the requirements for each product are added to the ReadSoft Collector and ReadSoft Invoices requirements.

<b>Operating system</b>	ReadSoft Collector can be installed on: <ul style="list-style-type: none"><li>• Microsoft Windows 10</li><li>• Microsoft Windows 8</li><li>• Microsoft Windows 7</li><li>• Microsoft Windows Server 2019</li><li>• Microsoft Windows Server 2016</li><li>• Microsoft Windows Server 2012 and 2012 R2</li><li>• Microsoft Windows Server 2008 R2</li><li>• Microsoft Windows Server 2008 (32-bit or 64-bit version)</li></ul>
<b>SW requirements</b>	<ul style="list-style-type: none"><li>• .NET Framework 4.7.2</li><li>• INVOICES 5-8 SP2 or later</li><li>• Microsoft SQL Server 2005, 2008, 2012, 2014, 2016, or 2019*</li></ul>
<b>Administrator requirements</b>	<ul style="list-style-type: none"><li>• If installed, user must have admin rights on ReadSoft Invoices Manager and Interpret module workstations.</li><li>• Admin rights on SQL Server.</li></ul>
<b>User requirements</b>	The user must have sufficient permissions to: <ul style="list-style-type: none"><li>• Retrieve email from mail servers.</li><li>• Store mail-attachment files on the disk.</li><li>• Store log files in the log folder.</li></ul>
<b>Mail account</b>	Mail account using IMAP, MAPI, EWS, or EWS with OAuth mail protocol **

\* Latest Service Pack and updates recommended. For ReadSoft Invoices and Microsoft SQL Server hardware and software requirements, refer to ReadSoft Invoices and SQL Server documentation.

\*\* An IMAP, MAPI, EWS, or EWS with OAuth mail protocol must exist to be able to retrieve invoices by email using ReadSoft Collector. You must set up email rules in your mail client to automatically move

the mail messages containing invoices to the ReadSoft Collector source folder. We recommend that you create the source, processed, and error folders in the mail box before ReadSoft Collector is installed.

**Important** When specifying a MAPI email account in the ReadSoft Collector input configuration, make sure that an email application is installed on the system, and the user configuring ReadSoft Collector is logged into the email account, so that the incoming mails from ReadSoft Collector are received. Domain or local administrator rights are not sufficient.

## ReadSoft Collector compatibility

Kofax ReadSoft Collector 6.5.0.11 can be installed and used with Kofax ReadSoft Invoices 6.1 or later.

## Install Collector with Invoices

Kofax ReadSoft Invoices 5.8 SP2 or later needs to be installed first. Refer to the *ReadSoft Invoices Installation Guide* found in the ReadSoft Invoices installation package.

The ReadSoft Invoices modules that ReadSoft Collector needs to be installed with depend on which functionally is to be used.

- To use the ReadSoft Collector software together with ReadSoft Invoices to collect invoices by email (attached image formats only), install ReadSoft Collector on every computer where ReadSoft Invoices Manager and Interpret modules are installed.
- To use ReadSoft Collector with ReadSoft Invoices to process XML invoices (either separately or in combination with normal image-based invoices), whether the invoices are gathered by email or retrieved from a folder, install ReadSoft Collector on all computers where any ReadSoft Invoices modules are installed.

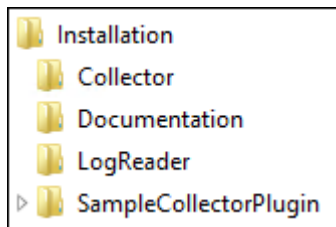
## Download Kofax ReadSoft Collector 6.5.0.11 installation files

To download the Kofax ReadSoft Collector 6.5.0.11 installation files, you must have an account and a valid serial number for the product from Kofax. If you do not have an account, you can easily create one.

1. Navigate and log in to the Kofax Electronic Fullfillment page (<https://delivery.kofax.com>).
2. If the product has not yet been registered:
  - a. Click **Add software**.
  - b. Add the serial number that you received from Kofax for the product.
  - c. Click **Submit**.

3. Navigate to **ReadSoft** in the list of products, select **Collector**, and click **Download**.

The Collector installation package is downloaded. The Collector installation package includes the following items:



4. Copy the installation package to a temporary folder.

## Install ReadSoft Collector Software

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

1. From the **Installation** folder, open `CollectorInstallation.exe`.  
The Kofax ReadSoft Collector installation wizard appears.
2. Click **Install**.  
The **Welcome** page appears.
3. Click **Next**.  
The **Destination Folder** page appears.
4. Click **Change** if you want to change the destination folder location or click **Next** if you want to proceed with the default location.  
The **Ready to install ReadSoft Collector** page appears.
5. Click **Install**.

A message stating that the installation is successful appears. Alternatively, if you have a previous version of ReadSoft Collector installed, a message stating that the previous version will be uninstalled and new version will be installed appears. Click **OK** to continue.

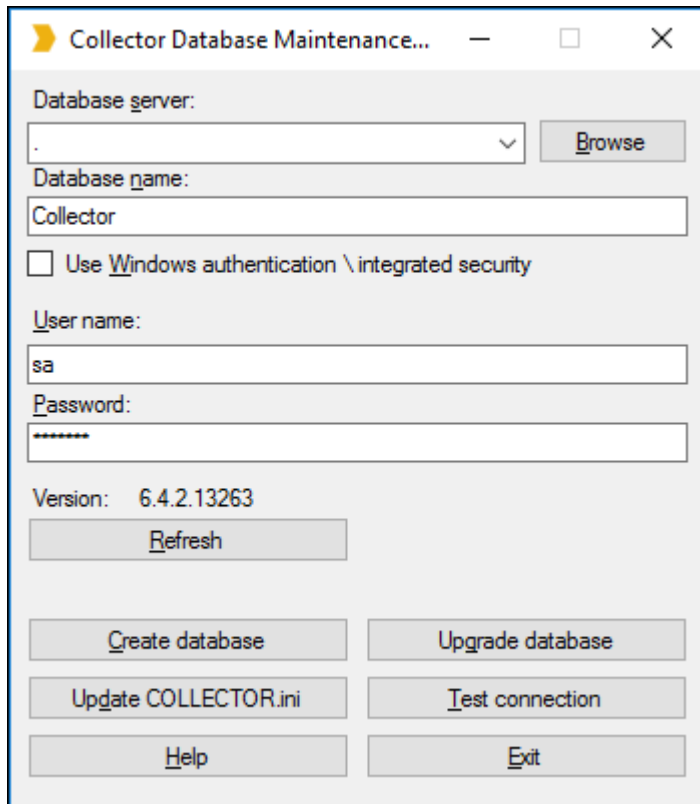
### Note

- No settings are lost. Just remember the ReadSoft Collector database name so that you can use it again when the program is upgraded.
- Make sure to start the database maintenance tool to check if you need to upgrade the database after ReadSoft Collector has been upgraded.
- When the **Completed** dialog box is displayed, click **Finish**.



## Create or connect to ReadSoft Collector database

1. Go to **Start > All programs > ReadSoft > COLLECTOR > Database Maintenance Tool**.  
The **Collector Database Maintenance Tool** page appears.



Collector Database Maintenance...

Database server: . Browse

Database name: Collector

Use Windows authentication \integrated security

User name: sa

Password: \*\*\*\*\*

Version: 6.4.2.13263 Refresh

Create database Upgrade database

Update COLLECTOR.ini Test connection

Help Exit

2. Configure the following details:
  - **Database server** address.
  - **Database name**.
  - Select **Use Windows authentication \integrated security** if you want to use your Windows authentication to connect to database.
  - Database **Username**.
  - Database **Password**.
3. Click **Create database** if this is the first time you are configuring the Kofax ReadSoft Collector database. Alternatively, click **Upgrade database** if you are re-installing the Invoices database.
4. Click **Test connection** to check the database connection.  
A message is displayed indicating whether the connection was successful.

5. Click **Exit**.

**Note** The database settings are read from COLLECTOR.INI. When updating the database settings (i.e., database server name, database name, and login information), it will be written into COLLECTOR.INI located in the Invoices Global Path folder. This is normally only done once when installing and setting up ReadSoft Collector. For more information, refer to the ReadSoft Collector help.

For information on how to set up a job to use ReadSoft Collector for email input, see [Set up ReadSoft Collector for use with Invoices](#).

## Upgrade from an earlier ReadSoft Collector database

If you want to use the ReadSoft Collector database that was created in a version prior to ReadSoft Collector 6.5.0.11, run the CleanUpXFields.sql script, either before or after upgrading the database. This removes the orphan XField fields that make the removal of XML invoice definitions from the system impossible.

The database maintenance script and instructions on how to use the script is available at the following location:

```
\ReadSoft\COLLECTOR\DBScripts\Maintenance\CleanUpXFields.sql
```

## Remove ReadSoft Collector

Kofax ReadSoft Collector can be removed by using **Uninstall or change a program** in the **Control Panel**.

**Note** Uninstalling ReadSoft Collector does not remove the ReadSoft Collector database. To remove the ReadSoft Collector database, you must manually remove it from SQL Server Management Studio. However, ensure that you take a backup of the database before you uninstall ReadSoft Collector.

## Chapter 2

# Get started

This chapter briefly explains how to set up ReadSoft Collector with the default settings and get it running.

## Set up ReadSoft Collector for use with ReadSoft Invoices

To configure ReadSoft Collector, you must perform the following two steps.

1. Define input-source configurations (for example, IMAP, MAPI, and/or from file) and saved in Kofax ReadSoft Collector. Specify other general settings, such as where to save the email attachments, how to handle logging and error reporting, and whether to install any additional plugins. All of these settings are stored in the ReadSoft Collector database.
2. Along with the configuration of other Kofax ReadSoft Invoices job-related settings, select the Input sources defined in the first step in the ReadSoft Invoices job when setting up the add-on/data source extension.

### Add input sources

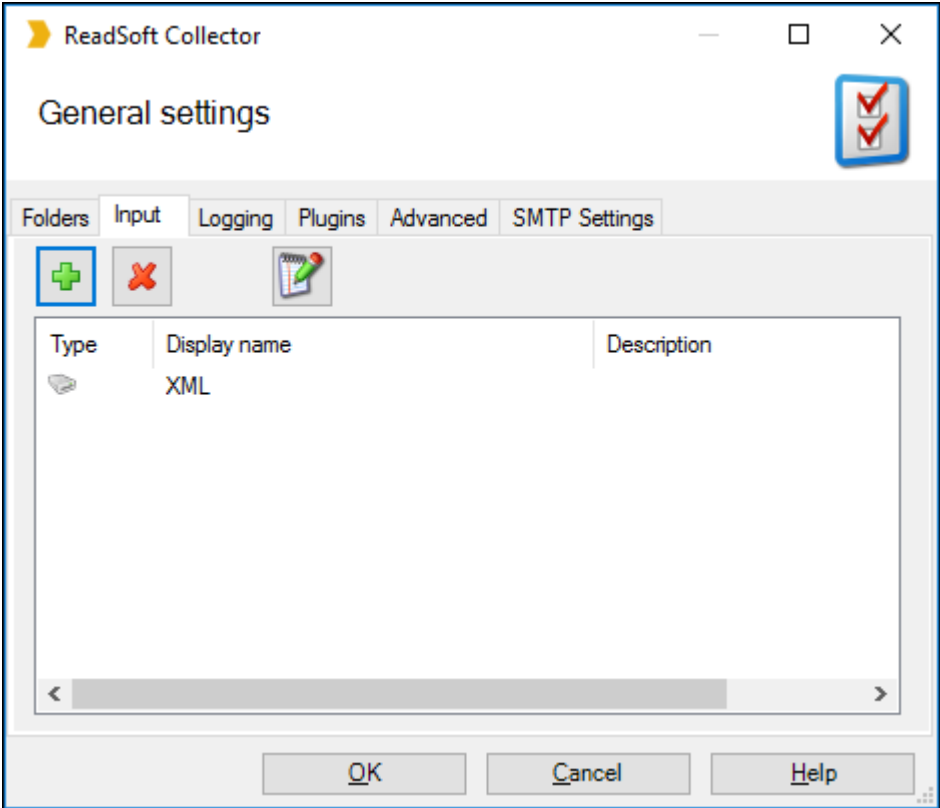
This section describes how to add input sources to Kofax ReadSoft Collector so that they can be selected in a Kofax ReadSoft Invoices job.


#### Configure an input source that retrieves email using MAPI

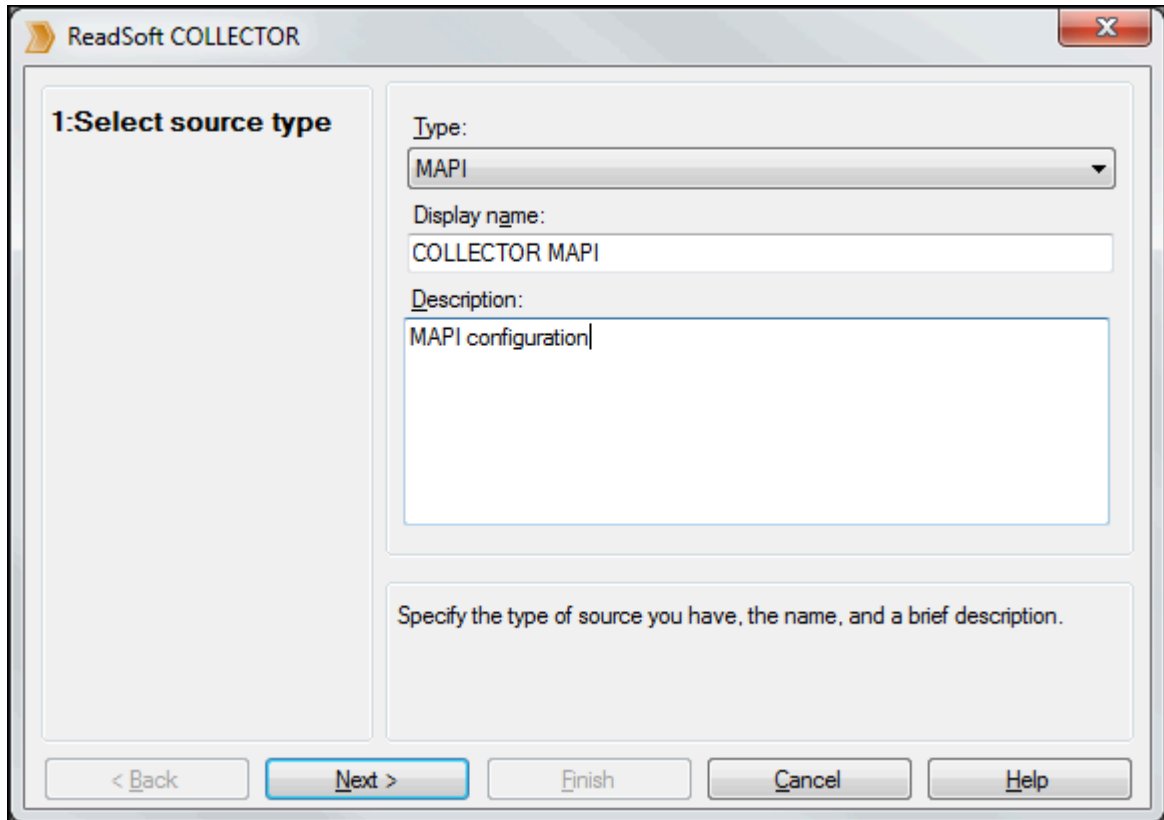
1. Log in to the computer using the same account as the one that will be used by the Interpret module. If you are planning to run Interpret as a service, make sure that you configure it to use a specific domain account.

**Note** You must log in to the computer with the default profile that receives the incoming email in the mail application on the computer. Domain or local administrator rights are not sufficient to configure the input source.

- 2. For Kofax ReadSoft Invoices, open the Manager module and select **Plugins > ReadSoft Collector** from the main menu.  
The ReadSoft Collector General settings dialog box appears.

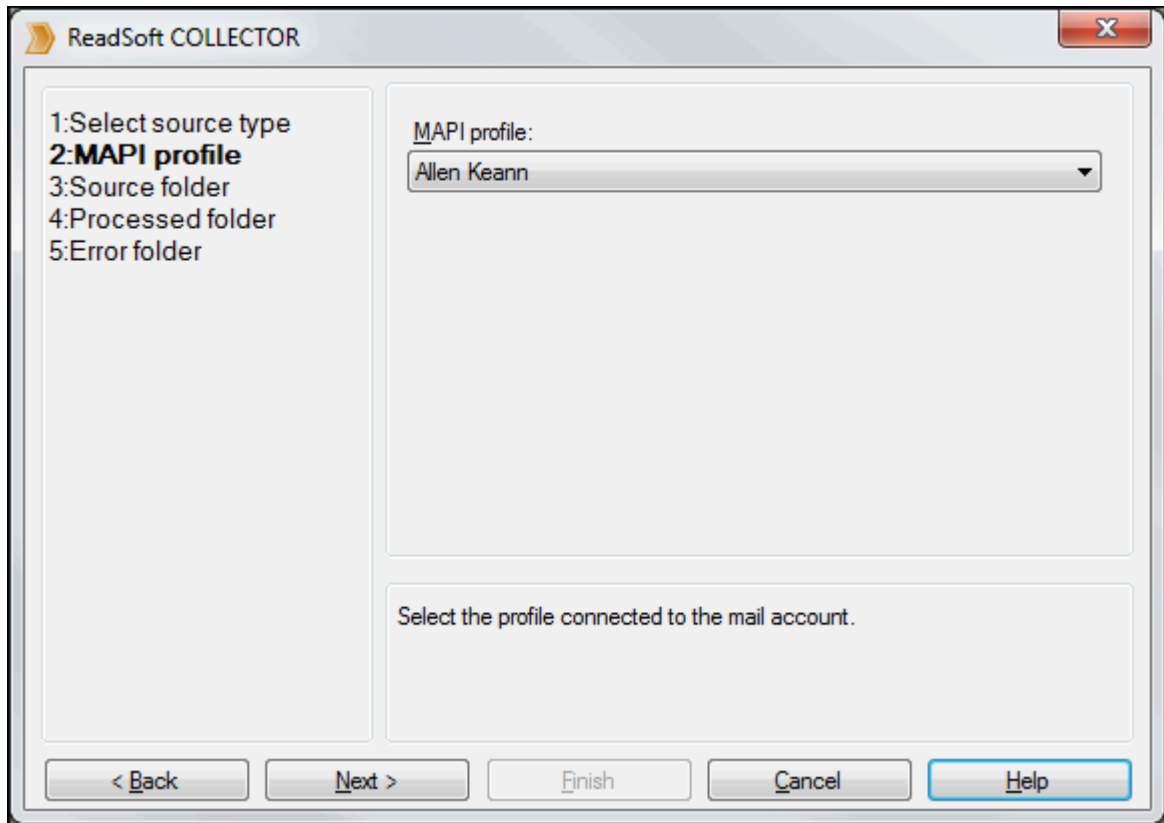


3. Select the **Input sources** tab and click .  
The add input source wizard appears.



4. On **1:Select source type**:
  - a. Select **MAPI** in the **Type** drop-down list.
  - b. Enter configuration name in the **Display name** box.
  - c. Enter a brief description about the configuration in the **Description** box.  
The information entered here will be visible later in the **Input source** list of the Collector General settings dialog box when the input source has been saved.

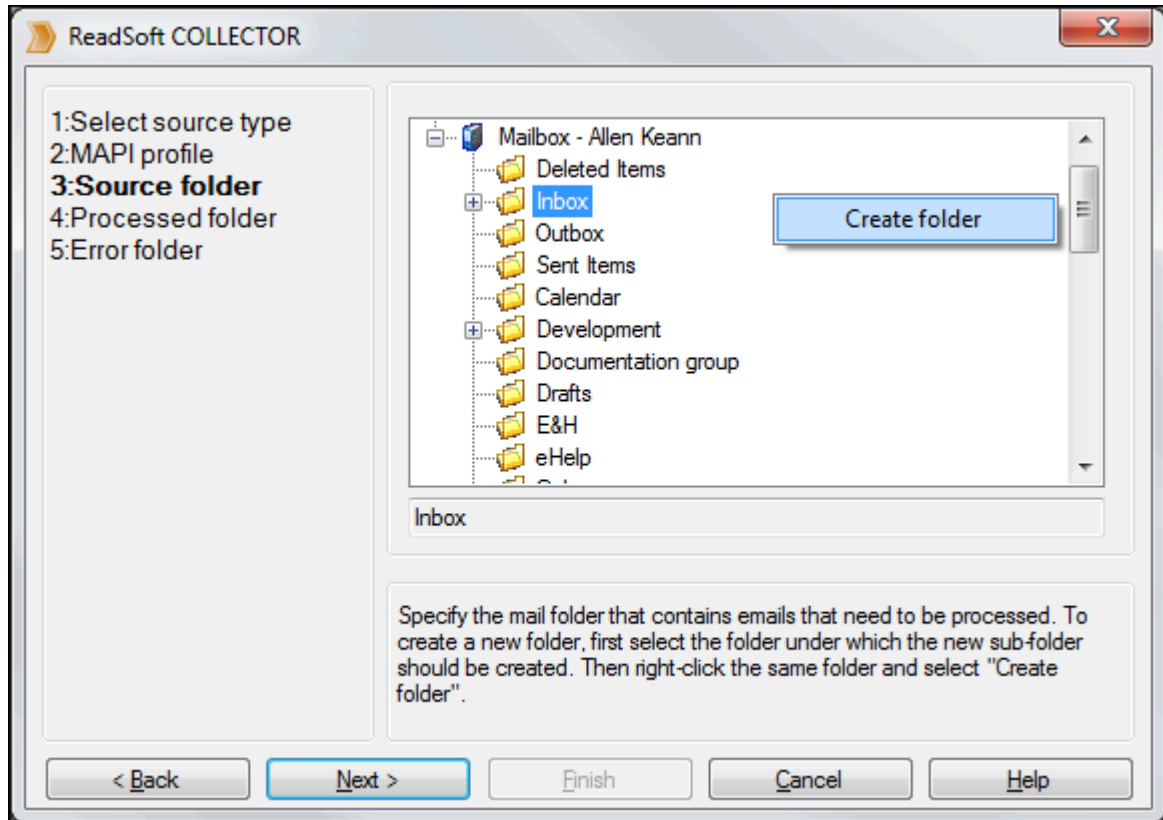
5. Click **Next**.



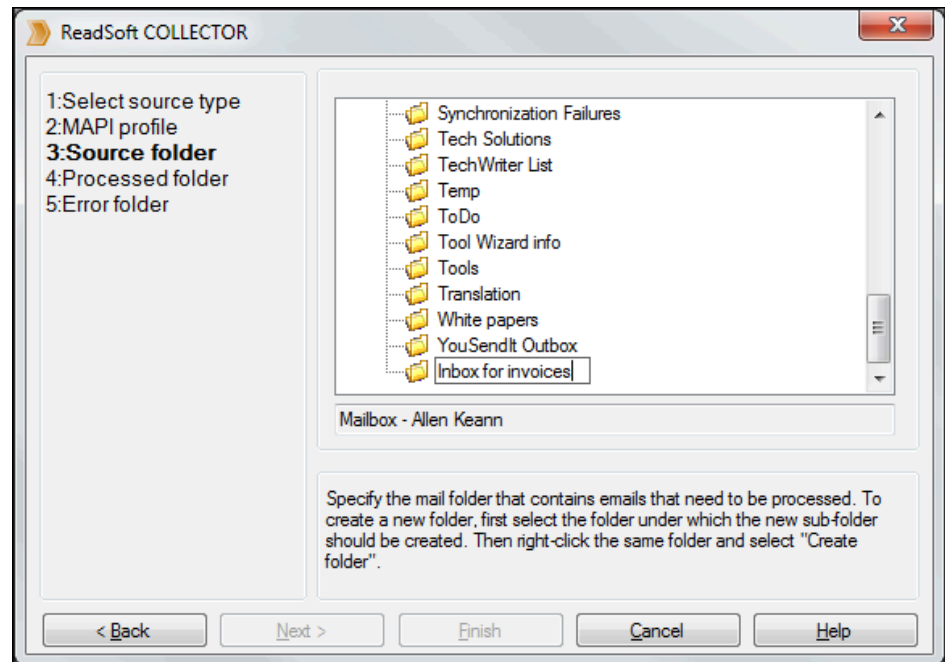
6. On the **MAPI profile** list, select the profile that need be used with the input source configuration (this must be the profile that will receive the incoming mail).

7. Click **Next**.

The folders that are available in connection with the selected profile are displayed.



8. Specify the mail folder that contains emails that need to be processed. You can select an existing folder or create a new folder. To create a new folder, perform the following steps:
- Right-click the folder under which the new folder needs to be created and click **Create folder**.
  - Enter a name for the new folder.




9. Repeat step 8 for **Processed folder** and **Error folder**.

The Processed folder is where the processed email messages are stored. The Error folder is where email messages with errors are stored.

10. Click **Finish**.

## Configure an input source that retrieves email using IMAP

**Note** IMAP using Limilabs is the recommended option for the following procedure as IMAP will be removed in a future version.

1. Open the Kofax ReadSoft Invoices Manager module.  
The **Manager - ReadSoft Invoices 6** page appears.
2. Go to **Plugins > ReadSoft Collector** from the main menu.  
The **ReadSoft Collector** page appears.
3. Select the **Input sources** tab and click .  
The add input source wizard appears.
4. On **1: Select source type**:
  - a. Select **MAPI** or **IMAP using Limilabs** in the **Type** drop-down list.
  - b. Enter configuration name in the **Display name** box.
  - c. Enter a brief description about the configuration in the **Description** box.  
The information entered here will be visible later in the **Input source** list of the Collector General settings dialog box when the input source has been saved.



5. Click **Next**.

ReadSoft COLLECTOR

1: Select source type  
2: **IMAP mail account**  
3: Source folder  
4: Working folder  
5: Processed folder  
6: Error folder

Mail server:  
emailservername

Port on IMAP server (143 is default):  
143  Use SSL (default port 993)

User:  
madonna@cicionne.com

Password:  
●●●●●●

Start folder (Used only in configuration - use \* to see all folders):  
\*

Connect

Specify mail server, user and password for the mail account.  
You need to click "Connect" before you can go to the next step.

< Back   Next >   Finish   Cancel   Help

6. Configure the **IMAP mail account**:

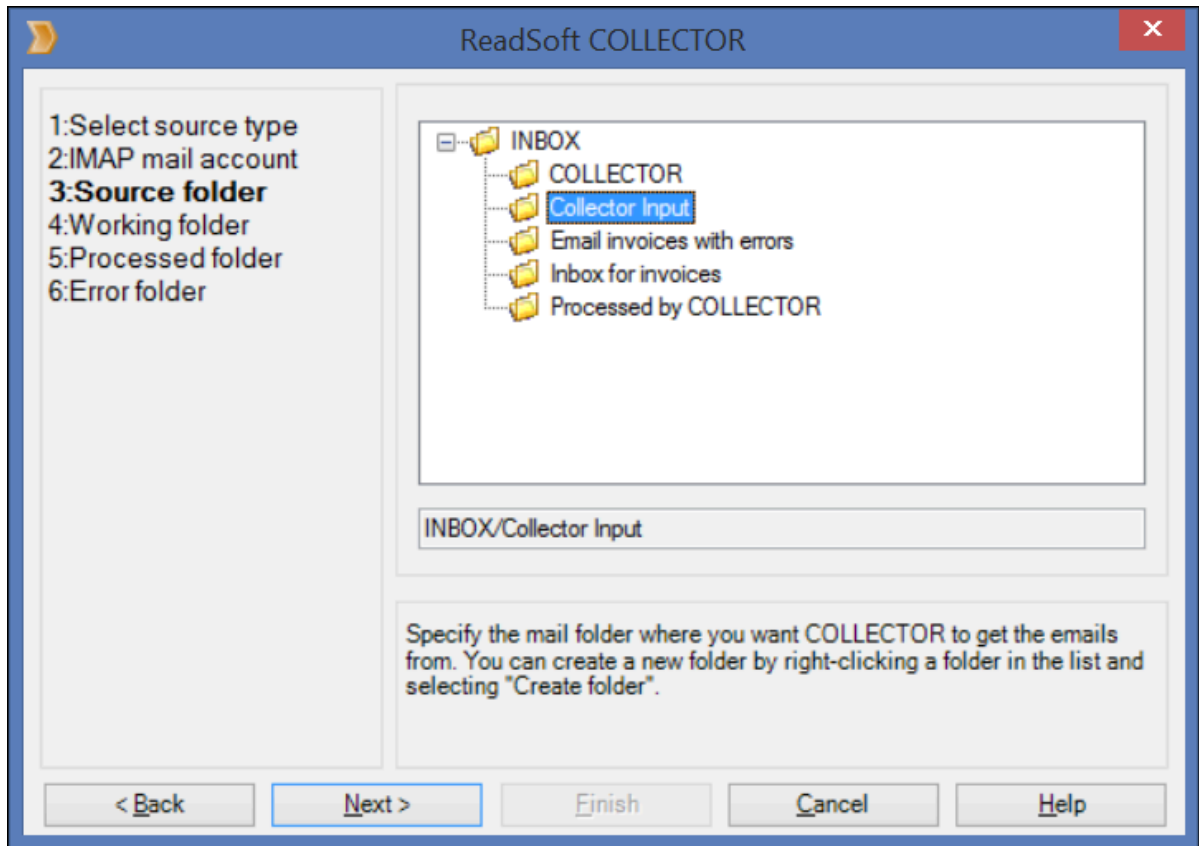
- a. Specify the IMAP mail server and user details for the account that will be used to retrieve emails.

**Note** To be able to configure an input source using IMAP on an Exchange server, the user must be specified using this format netbios domain name, domain user account, or mailbox alias.

- b. Verify the connection by clicking **Connect**. You are allowed to proceed to the next step only if the credentials are entered correctly and the connection is successful.

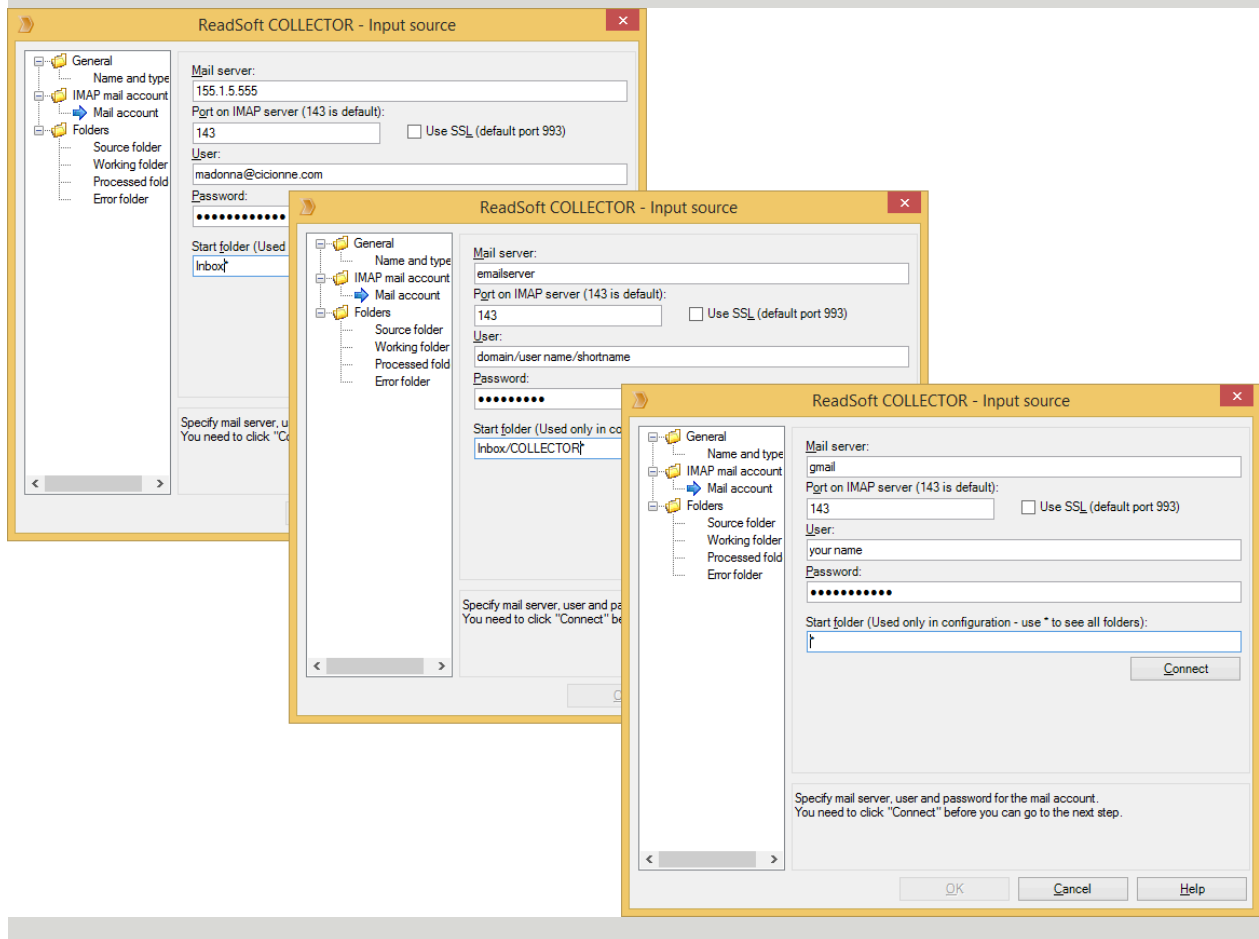
**Note** If there are many folders to sort through on the mail server, you can use the **Start folder** setting as a filter to quickly sort to the folders of interest. If you named the folders Kofax ReadSoft Collector input, ReadSoft Collector processed, and Collector errors as subfolders of the Inbox, for example, you could type in \*ReadSoft Collector\* so that only those folders appear in the next dialog.

7. Click **Next**.




8. Follow step 8 of [Configure an input source that retrieves email using MAPI](#) to specify **Source folder**, **Working folder**, **Processed folder**, and **Error folder**.
9. Click **Finish**.

### Example: IMAP configurations

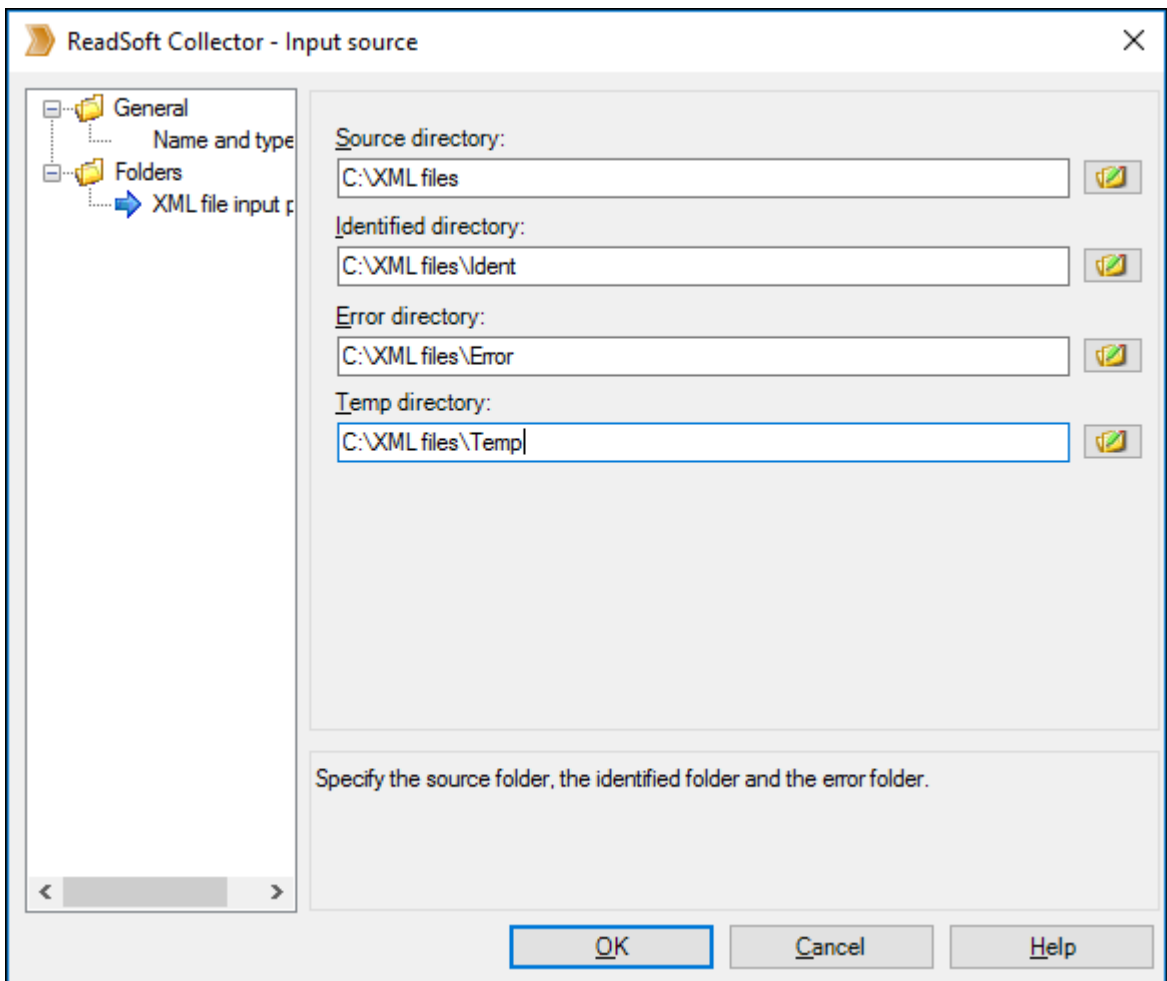


### Configure an input source to retrieve XML invoices from a file folder

You can configure Kofax ReadSoft Collector to retrieve XML invoices. However, ReadSoft Collector will use the appropriate logic to process the invoices correctly regardless of which type (XML, image based, or both) of invoices are present.


1. Open the Kofax ReadSoft Invoices Manager module.  
The **Manager - ReadSoft Invoices 6** page appears.
2. Go to **Plugins > ReadSoft Collector** from the main menu.  
The **ReadSoft Collector** page appears.
3. Select the **Input sources** tab, and click .  
The add input source wizard appears.

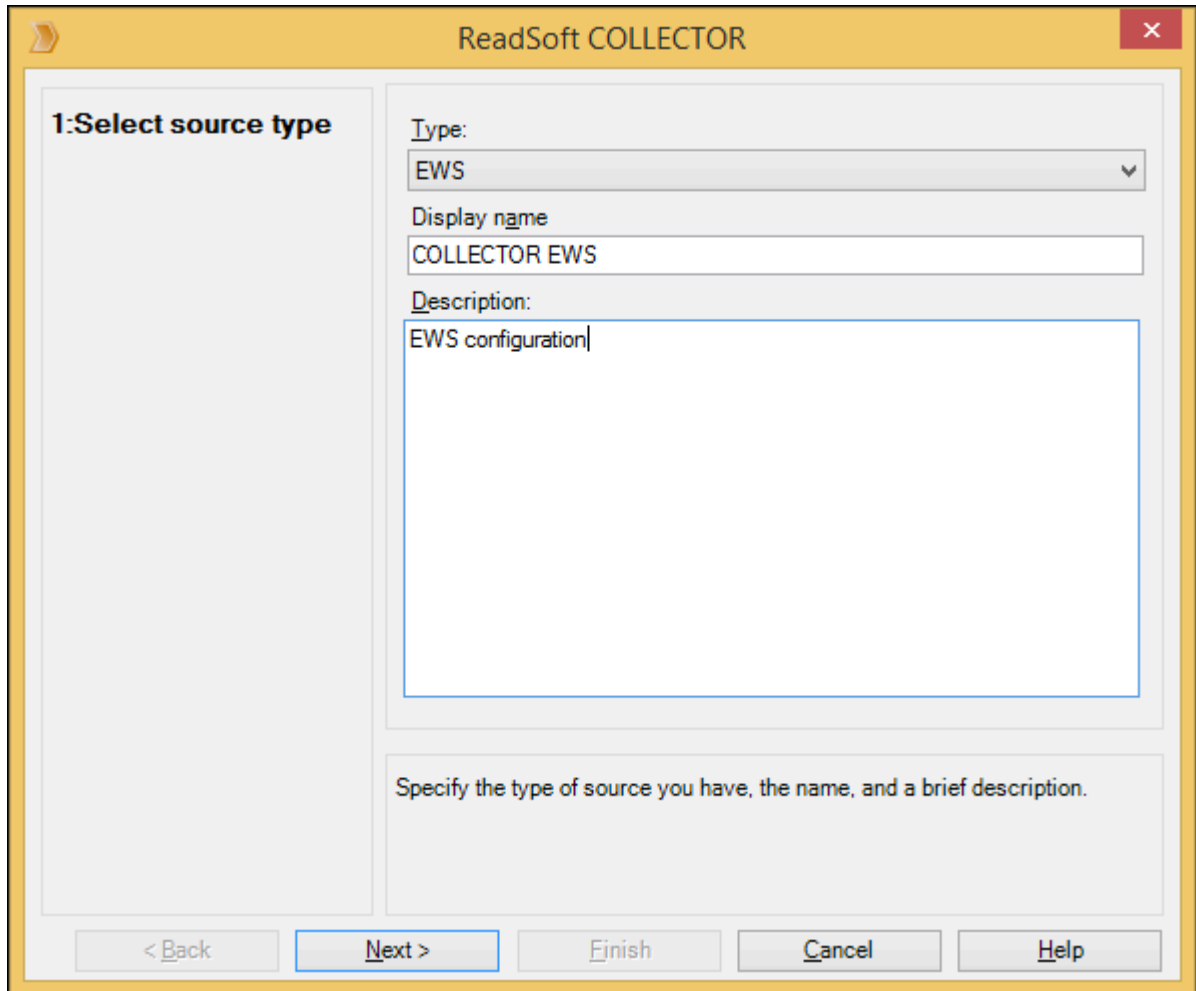
4. On **1:Select source type**:
  - a. Select **XML Files** in the **Type** drop-down list.
  - b. Enter configuration name in the **Display name** box.
  - c. Enter a brief description about the configuration in the **Description** box.  
The information entered here will be visible later in the **Input source** list of the Collector General settings dialog box when the input source has been saved.
5. Click **Next**.  
The **ReadSoft Collector - Input source** page appears.



6. Use the browse button to navigate to the **Source directory**. The path for other directories **Identified directory**, **Error directory**, and **Temp directory** are filled in automatically. Alternatively, you can also manually enter the path for the directories.
7. Click **OK**.

## Configure an input source that retrieves email using EWS

1. Open the Kofax ReadSoft Invoices Manager module.  
The **Manager - ReadSoft Invoices 6** page appears.
2. Go to **Plugins > ReadSoft Collector** from the main menu.  
The **ReadSoft Collector** page appears.
3. Select the **Input sources** tab and click .



The screenshot shows a dialog box titled "ReadSoft COLLECTOR" with a yellow border. On the left, a sidebar contains the text "1:Select source type". The main area contains three input fields: a "Type:" dropdown menu with "EWS" selected, a "Display name" text box containing "COLLECTOR EWS", and a "Description:" text area containing "EWS configuration|". Below these fields is a note: "Specify the type of source you have, the name, and a brief description." At the bottom, there are five buttons: "< Back", "Next >" (highlighted with a blue border), "Finish", "Cancel", and "Help".

4. On **1:Select source type**:
  - a. Select **EWS** in the **Type** drop-down list.
  - b. Enter configuration name in the **Display name** box.
  - c. Enter a brief description about the configuration in the **Description** box.  
The information entered here will be visible later in the **Input source** list of the Collector General settings dialog box when the input source has been saved.

5. Click **Next**.

**1: Select source type**  
**2: EWS Configuration**  
 3: Source folder  
 4: Working folder  
 5: Processed folder  
 6: Error folder

EWS URL (ex. https://mail.company.com/EWS/Exchange.asmx):  
 https://mail.acme.com/EWS/Exchange.asmx

Email address:  
 john.smith@acme.com

User: John Smith Domain: acme

Password: [masked] Leave empty for Office 365

Find URL

Impersonation  
 Use Impersonation Id Type: SmtpAddress  
 Id: [empty]

Start folder (Used only in configuration - use \* to see all folders):  
 \* Connect


Specify the EWS URL and user credentials (user, password, and domain).  
 If you do not know the URL, specify the email address, and click "Find URL".  
 If you want to use the credentials to access another mail account,  
 select impersonation and specify the Id for the intended mailbox. You must  
 click "Connect" before you can move on to the next step.

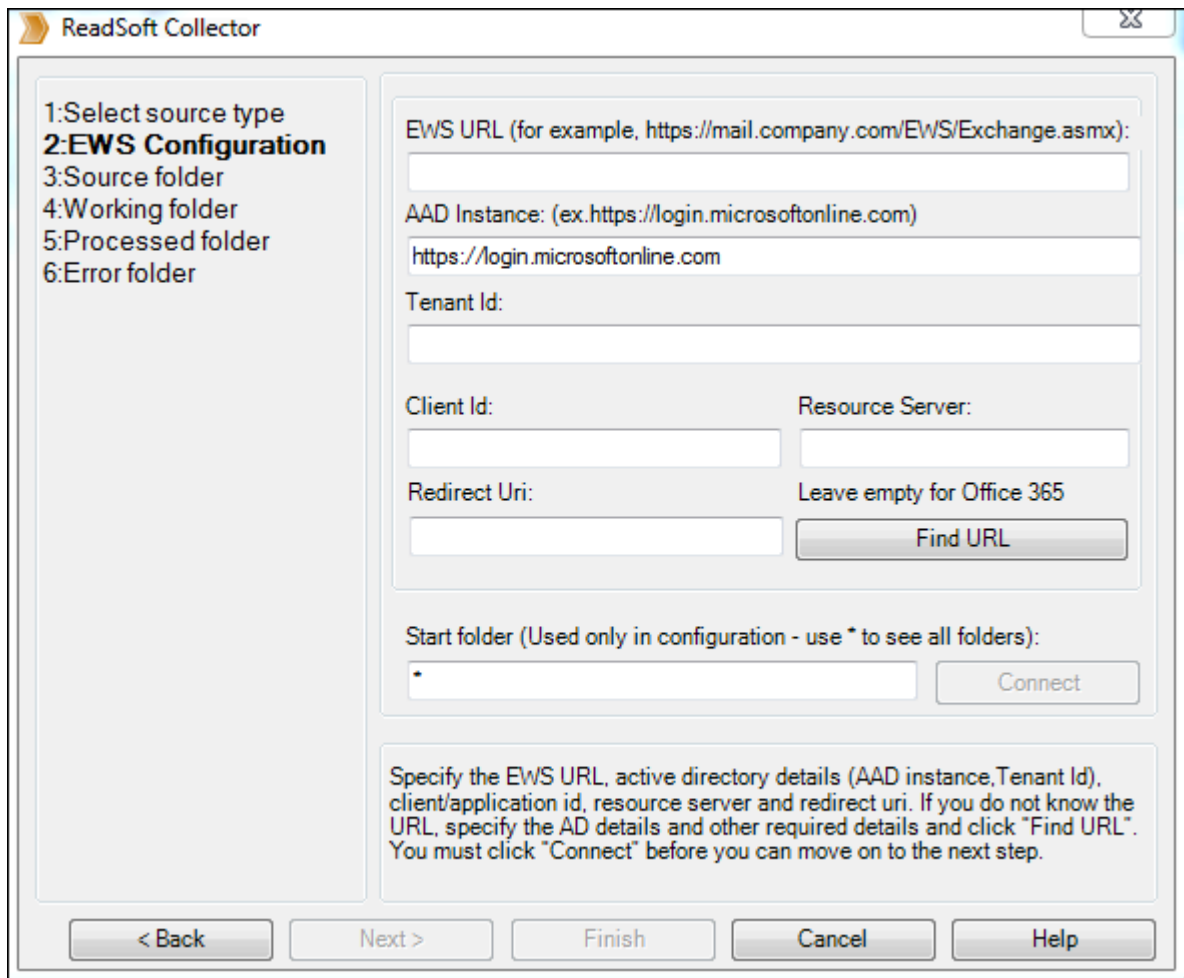
< Back Next > Finish Cancel Help

6. Specify **EWS configuration**:
  - **Email address**
  - **User name**
  - **Domain**
  - **Password**
7. Click **Find URL** to get the **EWS URL**.
8. Click **Next**.
9. Follow step 8 of [Configure an input source that retrieves email using MAPI](#) to specify **Source folder**, **Working folder**, **Processed folder**, and **Error folder**.
10. Click **Finish**.

## Configure an input source that retrieves email using EWS with Oauth

1. Open the Kofax ReadSoft Invoices Manager module.  
 The **Manager - ReadSoft Invoices 6** page appears.

2. Go to **Plugins > ReadSoft Collector** from the main menu.  
The **ReadSoft Collector** page appears.
3. Select the **Input sources** tab and click .
- The add input source wizard appears.
4. On **1:Select source type**:
  - a. Select **EWSWithOAuth** in the **Type** drop-down list.
  - b. Enter configuration name in the **Display name** box.
  - c. Enter a brief description about the configuration in the **Description** box.  
The information entered here will be visible later in the **Input source** list of the Collector General settings dialog box when the input source has been saved.
5. Click **Next**.



The screenshot shows the 'ReadSoft Collector' application window with the 'EWS Configuration' step selected in the left-hand navigation pane. The main area contains several input fields and buttons for configuring an EWS source.

**1:Select source type**  
**2:EWS Configuration**  
3:Source folder  
4:Working folder  
5:Processed folder  
6>Error folder

EWS URL (for example, <https://mail.company.com/EWS/Exchange.asmx>):

AAD Instance: (ex. <https://login.microsoftonline.com>)

Tenant Id:

Client Id:  Resource Server:

Redirect Uri:  Leave empty for Office 365

Start folder (Used only in configuration - use \* to see all folders):

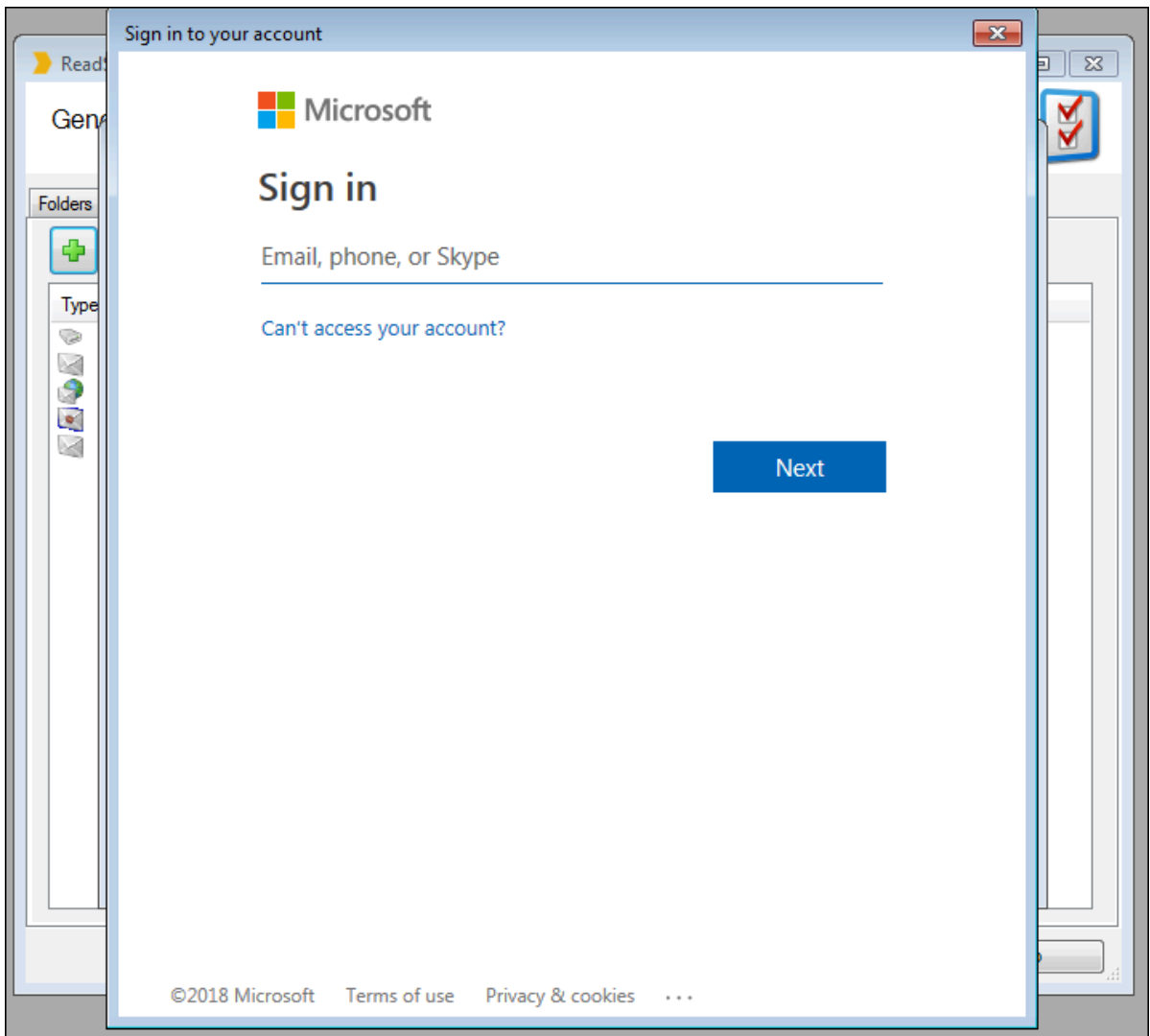
Specify the EWS URL, active directory details (AAD instance, Tenant Id), client/application id, resource server and redirect uri. If you do not know the URL, specify the AD details and other required details and click "Find URL". You must click "Connect" before you can move on to the next step.

< Back    Next >    Finish    Cancel    Help

6. Specify **EWS configuration**:

- **AAD Instance**
- **Tenant Id** name
- **Client Id**
- **Resource Server**
- **Redirect Uri**

If Resource Server is left blank, the resource server for Office365 is used and you are prompted to sign into Office 365 account specified for the resource server.



7. Click **Find URL**.

8. Once the login has been validated successfully, the **EWS URL** box is populated with the correct address and the **Connect** button is made available.

9. Click **Connect**.

A message stating that the connection is successful appears.



10. Click **OK**.
11. Click **Next** in the **Kofax ReadSoft Collector EWS Configuration** dialog.
12. Follow step 8 of [Configure an input source that retrieves email using MAPI](#) to specify **Source folder**, **Working folder**, **Processed folder**, and **Error folder**.
13. Click **Finish**.

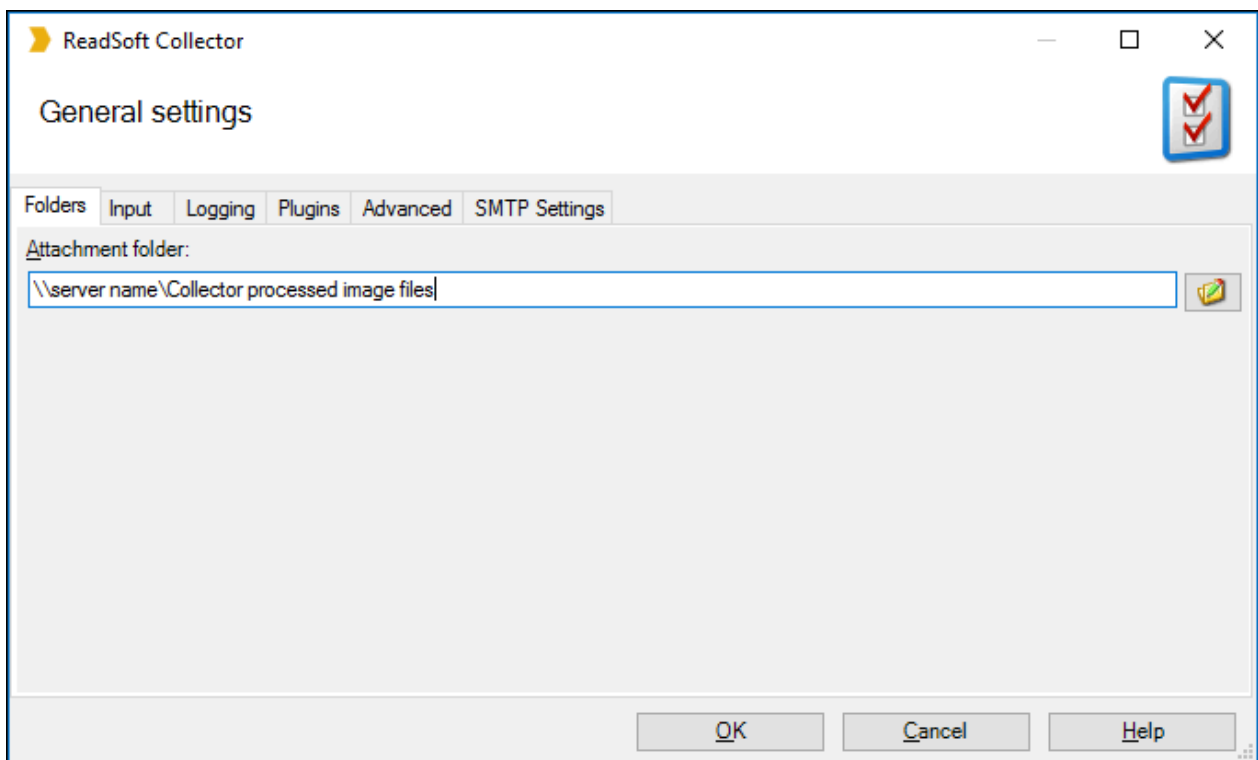
## Configure ReadSoft Collector's General settings for ReadSoft Invoices

Configure Kofax ReadSoft Invoices for ReadSoft Collector. Configure the following settings in ReadSoft Invoices for ReadSoft Collector to do its job regardless of the input source selected in the ReadSoft Invoices job:

- The folder where images or email attachments are stored after processing in ReadSoft Invoices.
- Input sources
- Logging options
- Plugin options

On the main menu of ReadSoft Invoices Manager, select **Plugins > ReadSoft Collector**.

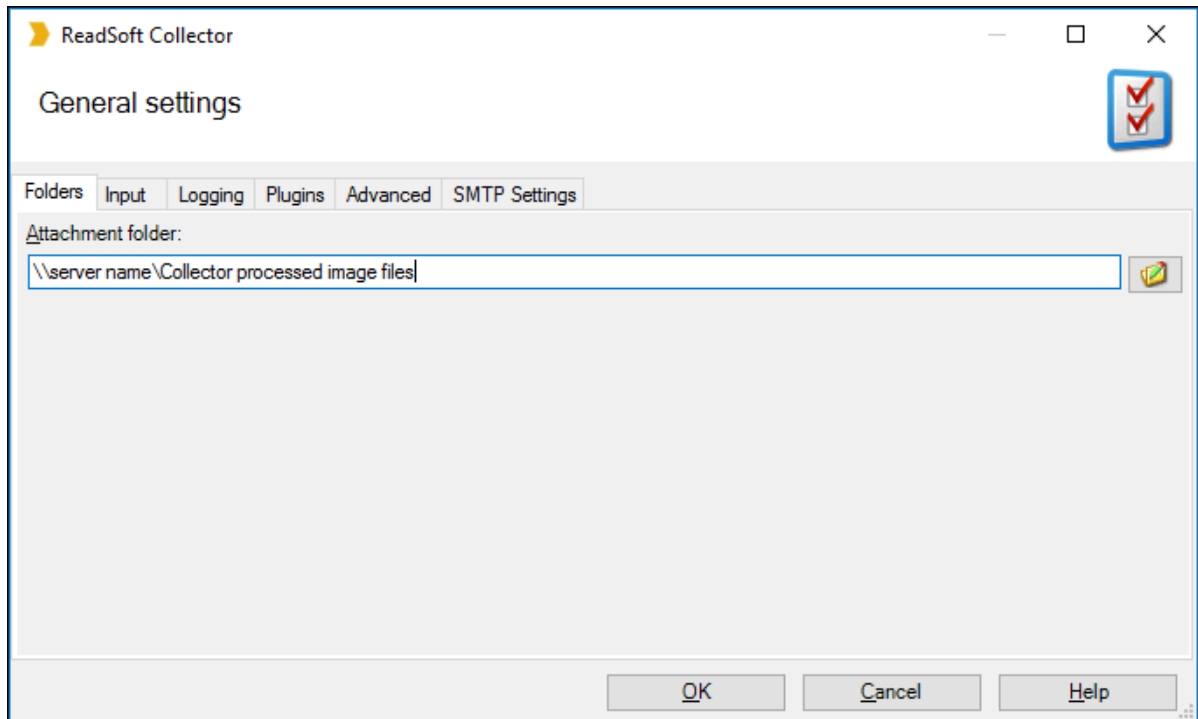
The Kofax ReadSoft Collector **General settings** dialog box appears.



## Specify where to put email attachments for processing

You need to specify the folder where the email attachments are stored by Kofax ReadSoft Collector for processing by Kofax ReadSoft Invoices.

1. In ReadSoft Collector **General settings**, select the **Folders** tab.



2. Enter the path to the folder where you want to store the mail attachments.
3. Click **OK**.

If multiple ReadSoft Invoices modules are distributed on different machines, make sure that the path works for all modules (a UNC network path is recommended). All accepted attachment file formats will be placed here (all image file and XML file formats).

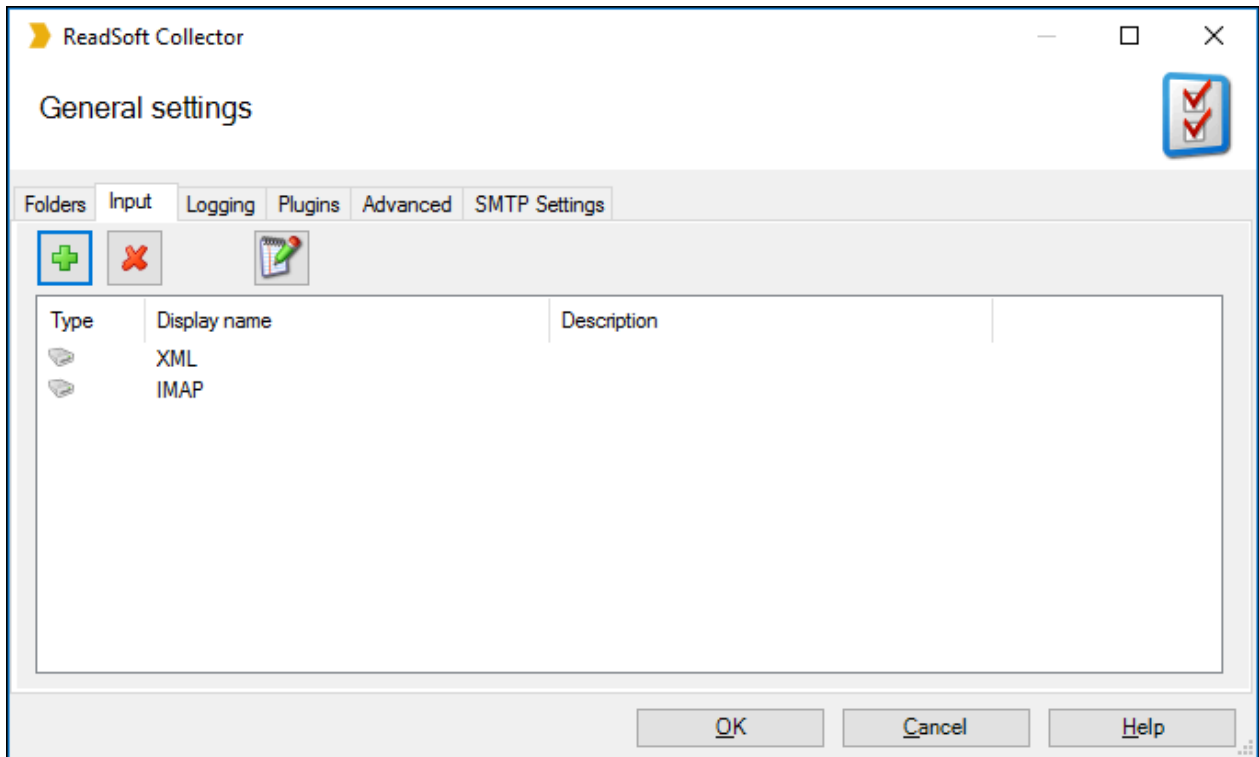
### Note

- You do not need to specify if the input source is a file or an old email option pack files.
- The account that runs the ReadSoft Invoices module(s) must have read and write access rights to this folder. This is very important when you are running a module, such as Transfer as a service. Since, by default, the Local System account does not have rights to read / write to network locations.

## Select input source configuration

Configure the input sources for Kofax ReadSoft Collector to identify the emails and save them to respective folders for processing by Kofax ReadSoft Invoices.

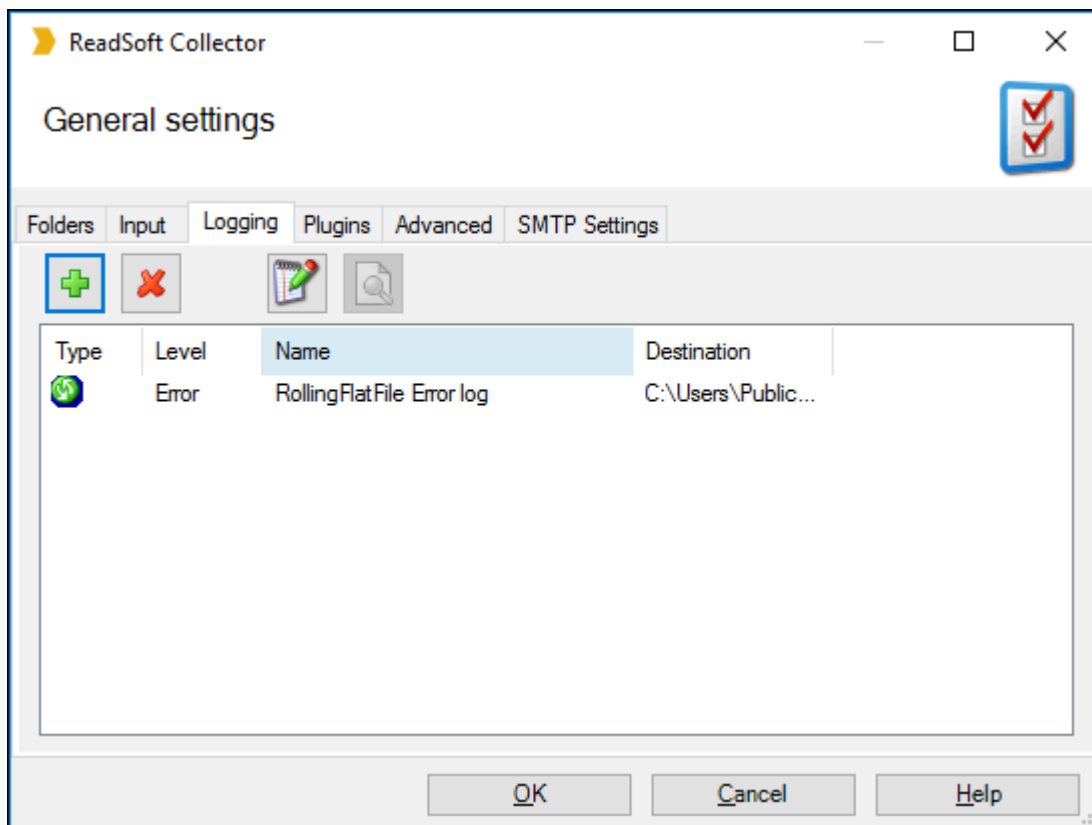
In ReadSoft Collector **General settings** dialog box, select the **Input** tab. The list of available configurations appears. You can also add new configurations, see [Add input sources](#) for more information.



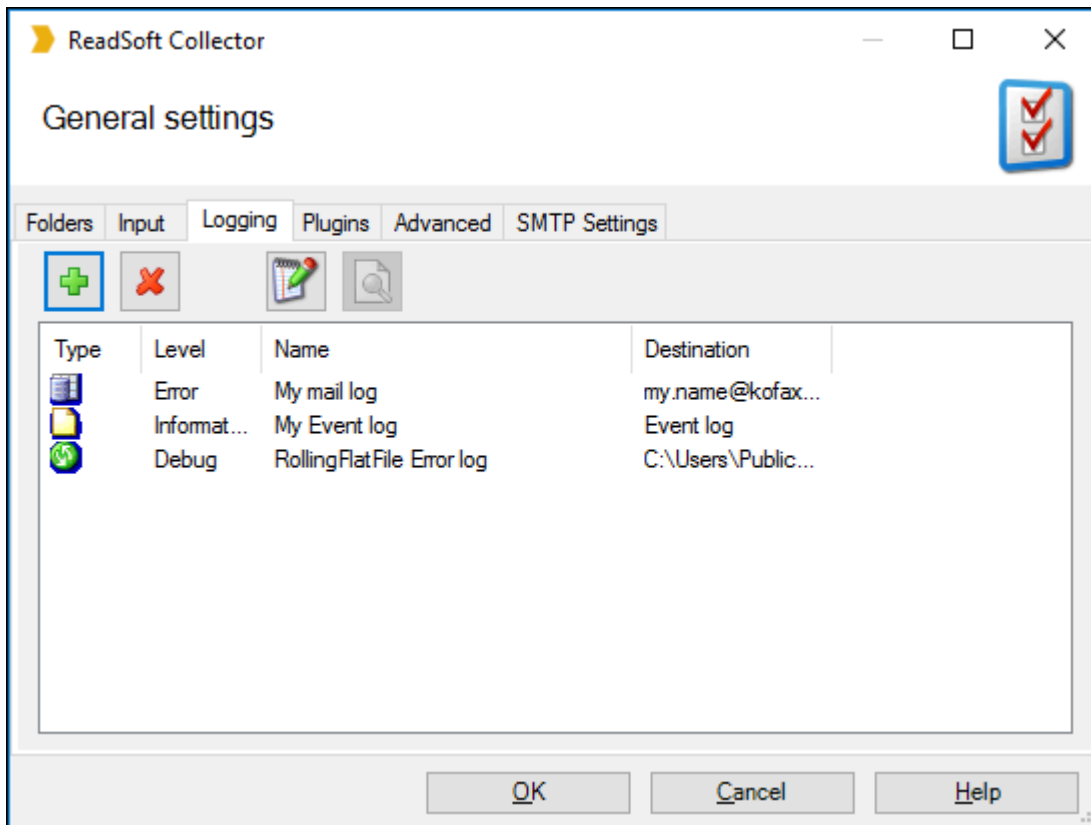
When retrieving files by email, rules must be applied to the incoming emails to automatically move them to correct folder used by the corresponding ReadSoft Collector input source. To know how to set rules for incoming emails, refer to IMAP/MAPI or respective email-client documentation.

## Specify log options

In the Kofax ReadSoft Collector **General settings** dialog box, select the **Logging** tab. The available logging options appear.



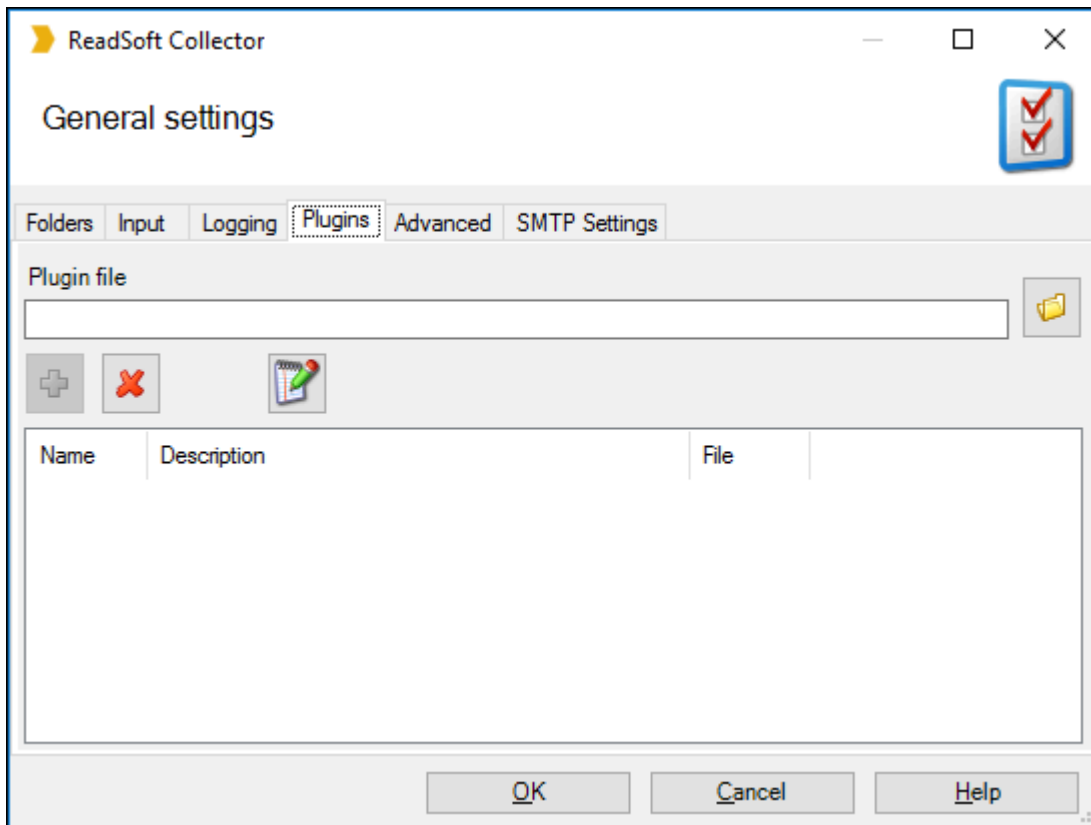
You can use multiple log configurations simultaneously. A log file is generated when the related log information is triggered.



To add a new log type, click . To delete a log type, select the log type and click . For more information about logging options, refer to the ReadSoft Collector help.

## Add customizations

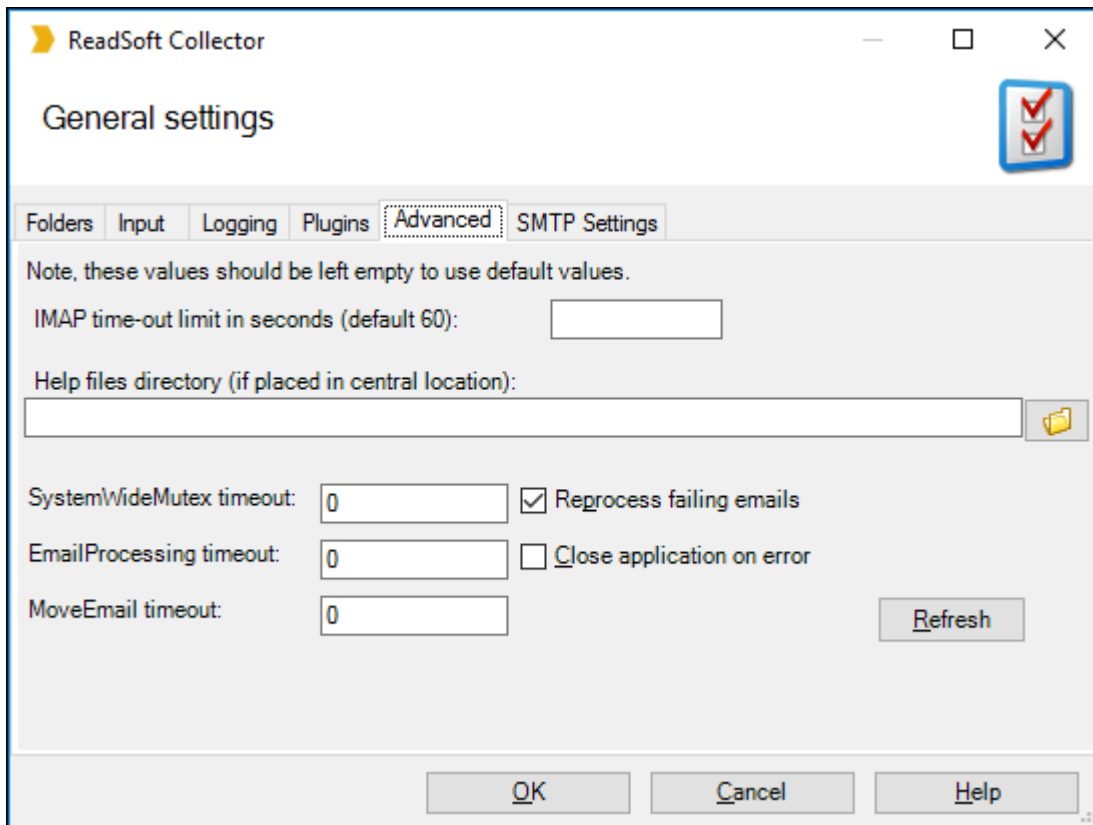
You can add new plugins to extend Kofax ReadSoft Collector's functionality. For more information on how to use plugins with ReadSoft Collector, refer to the ReadSoft Collector help.



## Troubleshoot errors that occur in the system

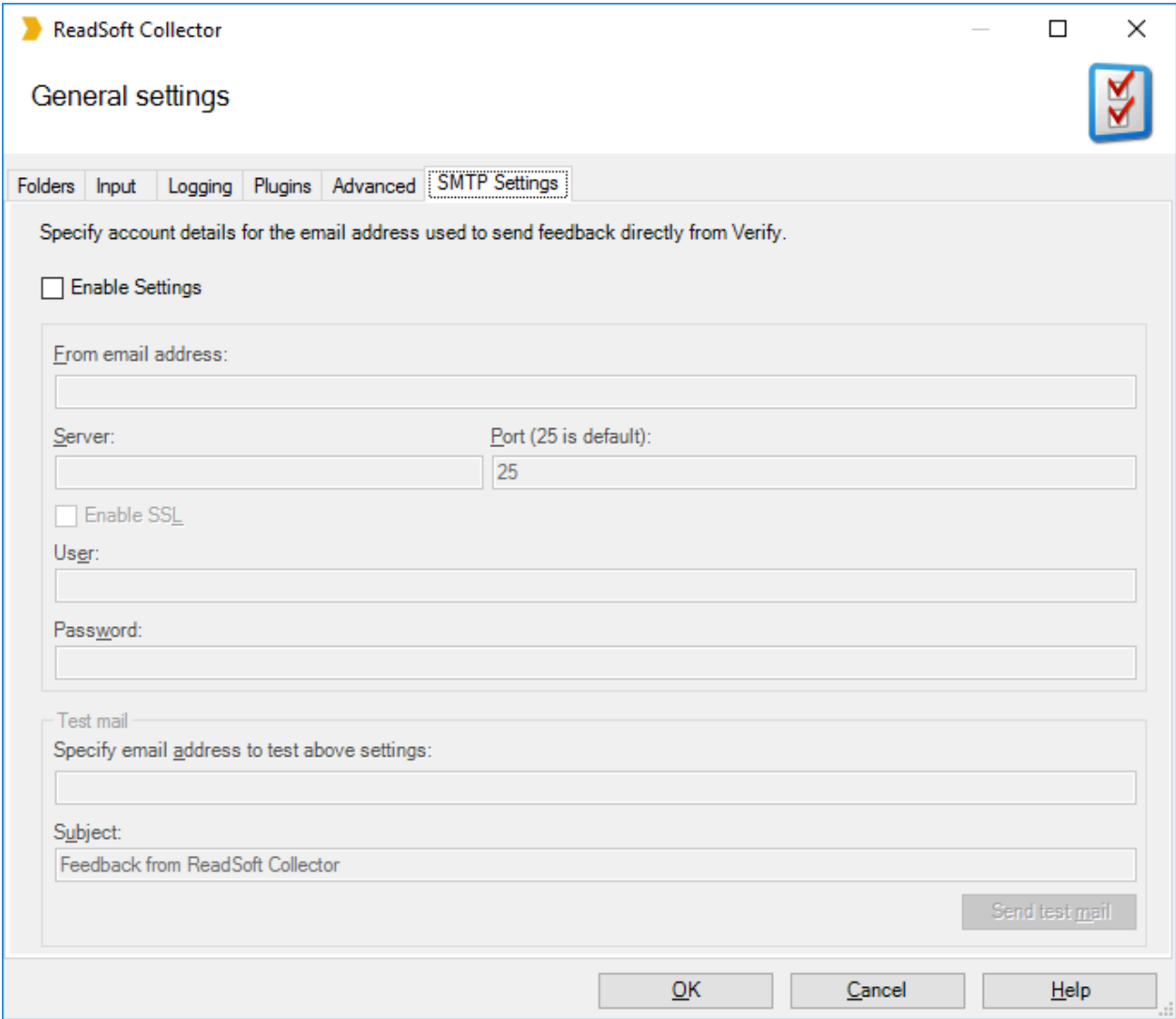
Use the settings in the **Advanced** tab of the **General settings** dialog to troubleshoot errors that occur while using the application or when the system becomes unstable. For more information, refer to the Kofax ReadSoft Collector help.

**Note** Use the settings in the **Advanced** tab only if you are experiencing problems in the system.



## Set up email account to send feedback on invoices

Use the settings on the **SMTP** tab of the **General settings** dialog box in ReadSoft Collector to set up an email account to send feedback on invoices directly from Verify in Kofax ReadSoft Invoices.



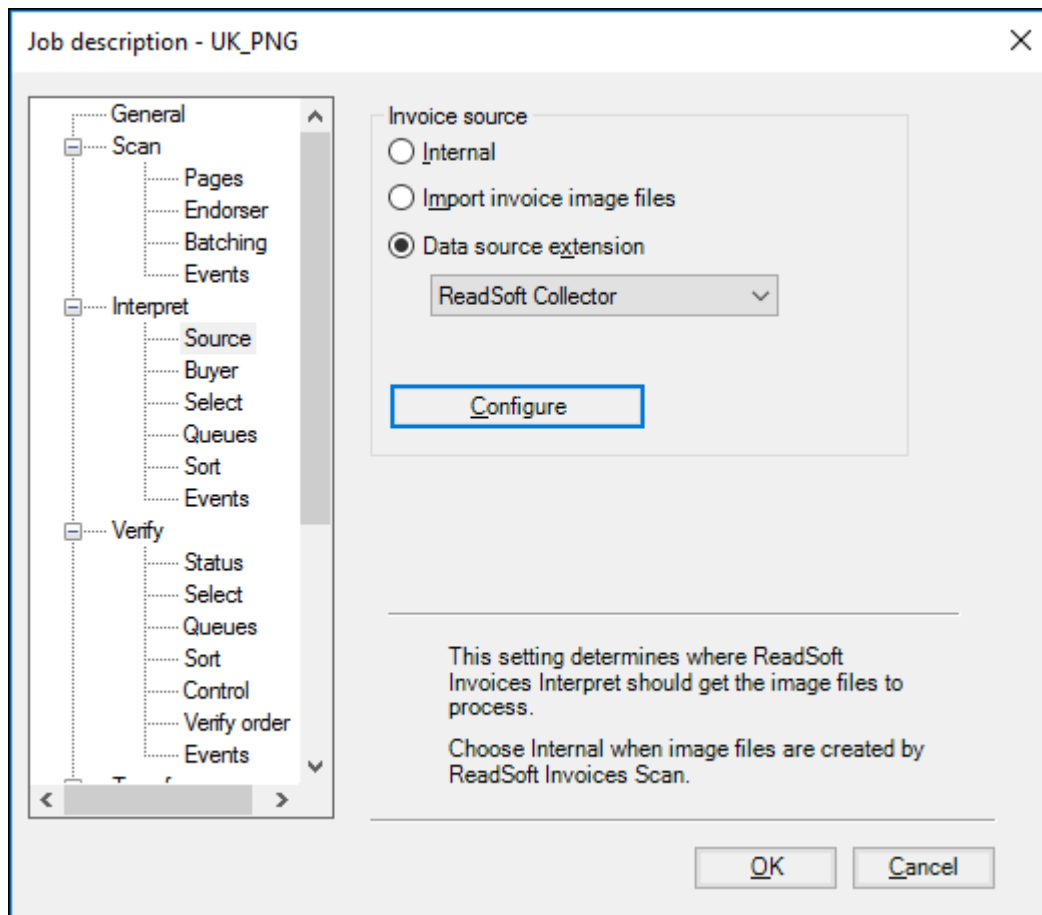


## Configure ReadSoft Invoices job for ReadSoft Collector

This section describes how to configure Kofax ReadSoft Invoices job to use ReadSoft Collector input source.

1. Open ReadSoft Invoices job in either Kofax ReadSoft Invoices Manager or Kofax ReadSoft Invoices Interpret.

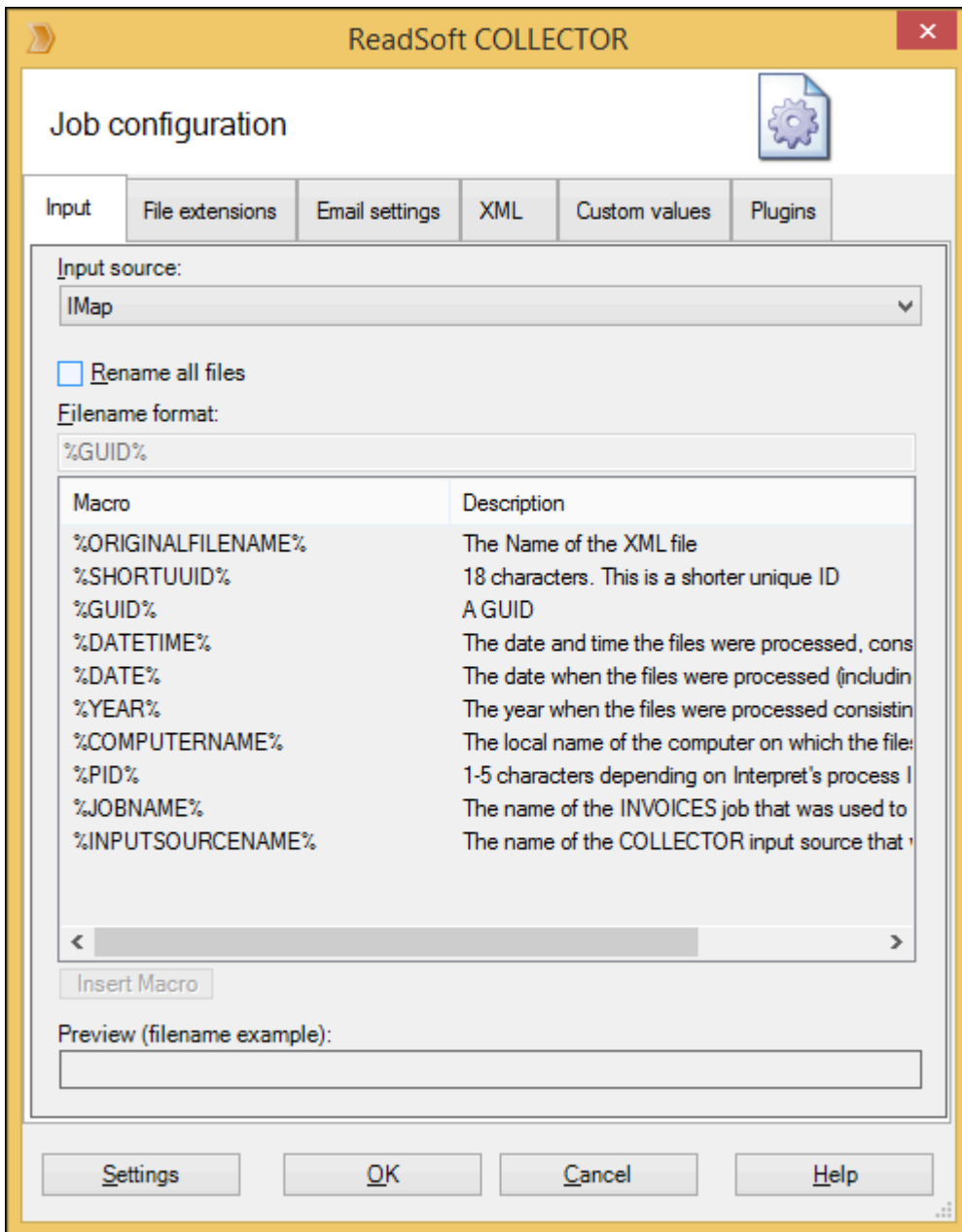
The **Job description <Company\_Name>** dialog box appears.



2. Select **Interpret > Source**.

3. Under **Invoice source**:
  - Select **Data source extension**.
  - Select **ReadSoft Collector**.
  - Click **Configure**.

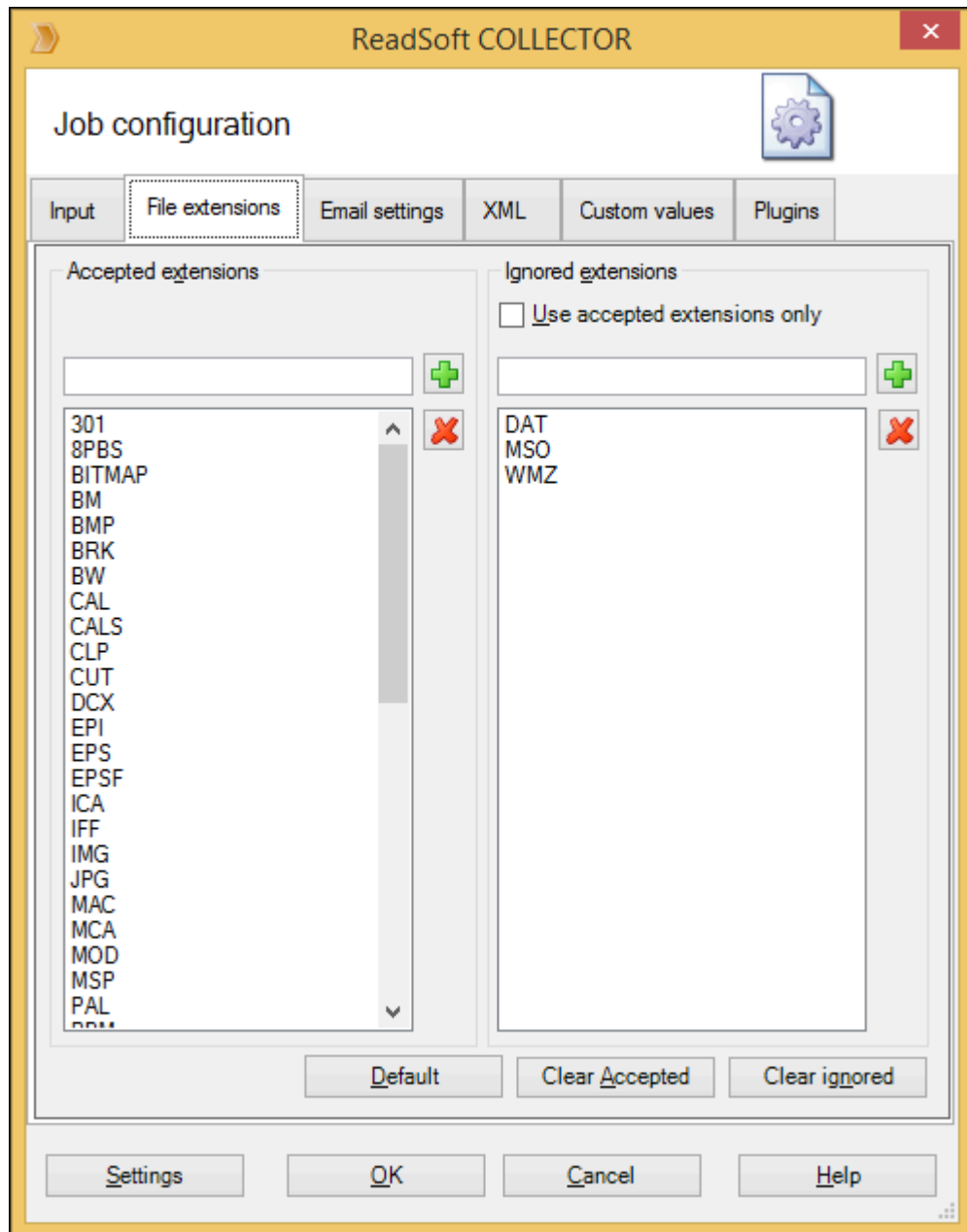
The **Job configuration** dialog box appears.



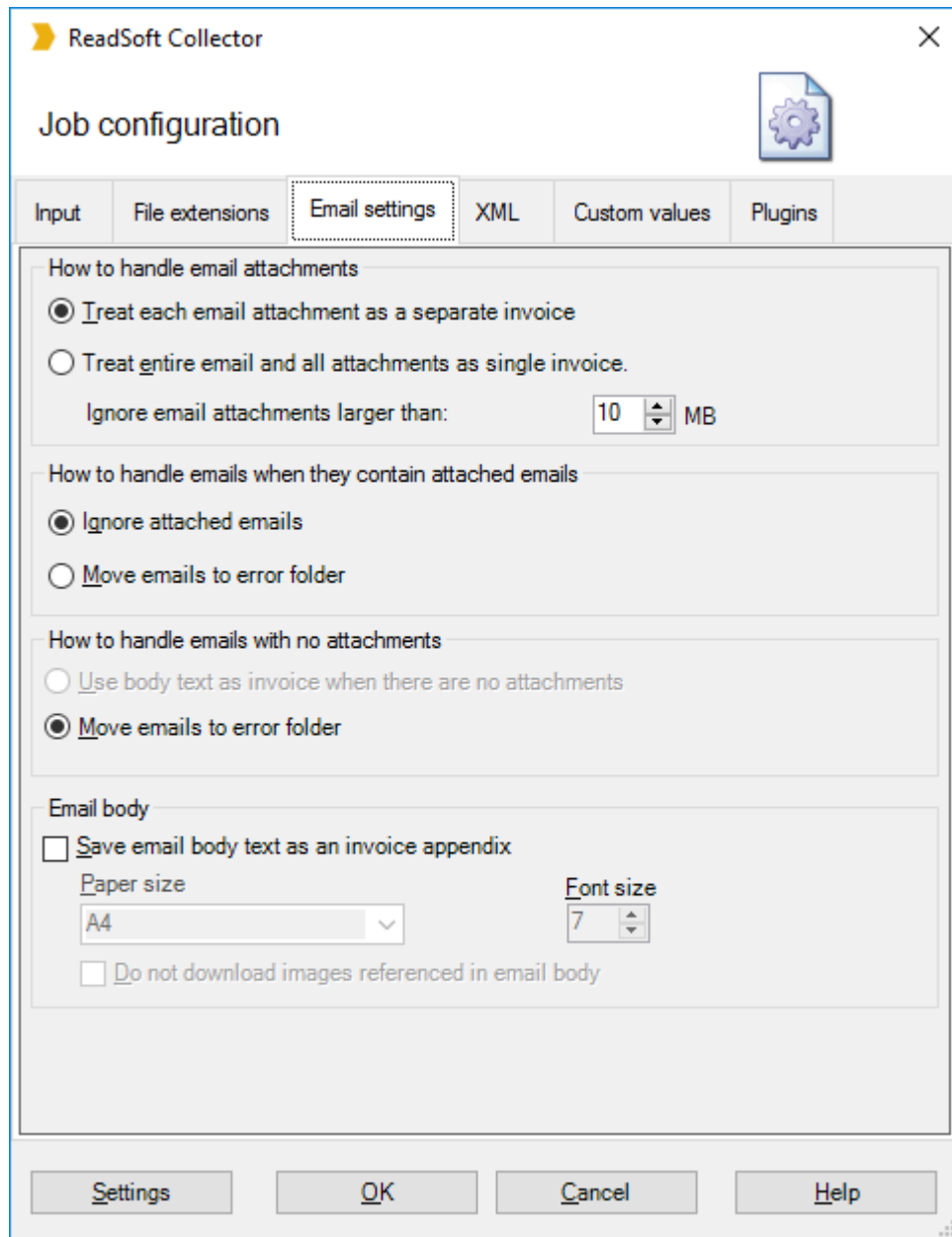
4. On the **Input** tab, select one of the input sources that was specified earlier. For more information, see [Add input sources](#).

If your archive or ERP system has a particular filename requirements, your invoice files need to have short filenames of fixed length, or you can add a prefix to the existing file names. You can also rename all processed files of the current job by clicking **Rename all files** and then specifying the filename format using the macros provided or adding static text as needed. A preview of the filename is provided.

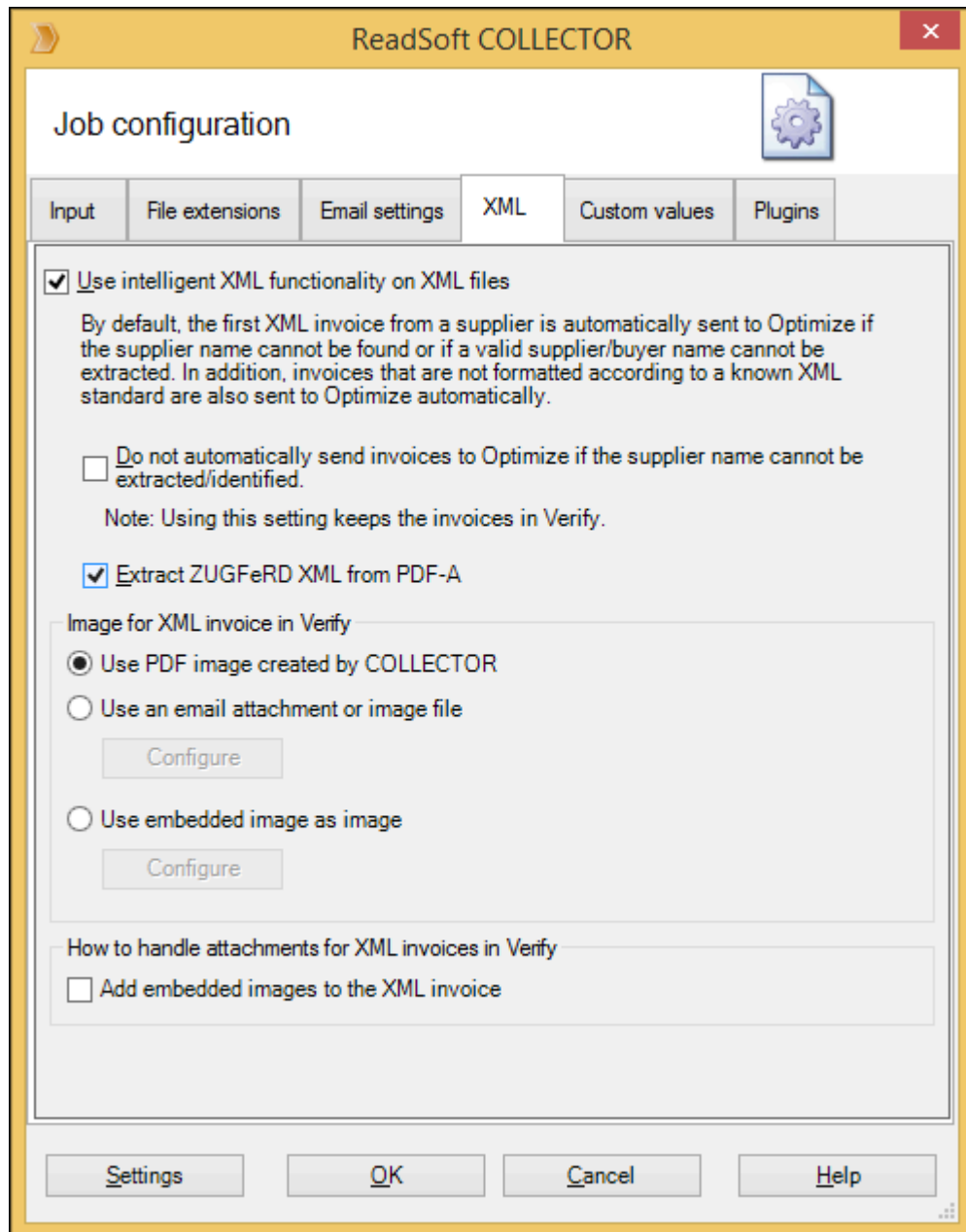
5. Click the **File extension** tab and add file extensions for those file types that are accepted or ignored as valid invoice images/file types when files are received by email.



- **Accepted extensions:** The files are passed on for processing.
  - **Ignored extensions:** These files are ignored. If the email has other attachments that are acceptable, they are passed on for processing.
  - **Neither accepted nor ignored:** Emails with such attachments are sent to the error folder.
6. Click the **Email settings** tab to specify if each email attachment is considered as a separate invoice or if the entire email including all attachments is considered as a single invoice.



- You can also specify how to handle emails if they contain other emails as attachments and if they do not have any attachments at all.
  - If you want to include the body text of the email as a part of the invoice information, select **Save email body text as an invoice appendix**. You can also specify the paper size and decide if you want to download images referenced in the email body.
7. If ReadSoft Collector's intelligent XML functionality is to be used to process XML files, click the **XML** tab and ensure that **Use intelligent XML functionality on XML files** is selected.



- Normally invoices for which the supplier name cannot be extracted are sent to Optimize, meaning that they do not turn up in Verify. If the **Do not automatically send invoices to Optimize: if the supplier name cannot be extracted/identified** option is selected, these invoices are displayed in Verify even though the supplier name cannot be extracted/identified. However, they cannot be approved in Verify since the supplier cannot be changed for XML invoices. They still need to be sent to Optimize for further processing.
- Under **Image for XML invoice in Verify**, specify which image to display in Verify for XML invoices. You can use the PDF image generated by ReadSoft Collector, you can use attached

images or other images, or you can use embedded images if there are any. You can also choose if you want to display all embedded images in Verify for the invoice.

**8. Click **OK**.**

ReadSoft Invoices retrieves emails and any attached invoices from the location specified in the input source selected in your job.

## INI flags in eiglobal.ini that affect XML functionality

The INI flags in eiglobal.ini affect how XML functionality is used by Kofax ReadSoft Collector.

[Interpret] section

- XMLextractimageReferencelImages
- XMLDoNotDeleteOriginalImage

See INVOICES-INI-File-Help.chm in the Bin folder of your Kofax ReadSoft Invoices installation for information on how to use these flags.

## Buyer identification

If specified, this section defines the order in which the fields are checked to identify the buyer and contain entries such as:

- [BuyerIdentification]
- BuyerField1=VATRegistrationNumber
- BuyerField2=Name1
- BuyerField3=BuyerNumber

If the above section is not specified in eiglobal.ini , these fields are checked by default to identify the buyer:

- Vatregistrationnumber
- Name1
- Name2
- Namesupplement1
- Namesupplement2

## Supplier identification

If specified, this section defines the order in which the fields are checked to identify the supplier and contain entries such as:

- [SupplierIdentification]
- SupplierField1=SupplierNumber
- SupplierField2=Name1
- SupplierField3=VATRegistrationNumber

If the section above is not specified in eiglobal.ini, these fields are checked by default to identify the buyer:

- SupplierNumber
- Name1

- Name2
- Description
- POBox
- Street
- StreetSupplement
- PostalCode
- BuyerAddressPostalCode
- City
- CountryCoded
- CountryName
- TelephoneNumber
- FaxNumber
- VATRegistrationnumber
- TaxNumber1
- TaxNumber2
- CorporateGroupID

## Process XML files

XML invoices are handled in the same way as image files with these exceptions.

- You can specify that invoices from suppliers that have not been processed previously in Kofax ReadSoft Collector or invoices from suppliers that do not use a supported XML invoice standard are automatically saved in Kofax ReadSoft Invoices's Optimize module where the fields can be mapped manually using the new XML Field Mapper.

**Note** If you use another plugin/solution to process XML files, this option should be deselected.

- The ReadSoft Collector input source used must be configured to process XML files.
  - XML files can be retrieved for processing directly from a file folder. For more information, see [Configure an input source to retrieve XML invoices from a file folder](#).
  - If XML files are received by email, a job can process emails with either image or XML attachments, but not both in the same mail. If a single email contains both image and XML attachments, only the XML attachments are processed.

**Note** Even though the XML attachment is the only one processed, other mail attachments can be used as the image for the invoice in Verify. For more information, see [Configure Invoices job to use Collector as the input source](#).

- When email is used as the input, a separate email input folder needs to be set up for each job to keep them separate.

Refer to the ReadSoft Collector help for more information on how to configure input sources. Refer to the ReadSoft Invoices help for more information on how to process XML files together with ReadSoft Collector.



## Optimize XML invoice definitions

Invoices from suppliers that are new to the system and those that deviate from the supported standards need to be optimized with their own invoice definition so that the system can learn the supplier details and process subsequent invoices from them automatically. XML invoice definitions are normally optimized in connection with the first invoice that is received from a supplier, which means that these invoices are not displayed in Verify until they are optimized. If you want to be able to see these invoices in Verify before they are sent to Optimize, you can stop Collector from automatically sending XML invoices from suppliers that have not been processed previously directly to Optimize. For more information, see [Configure Invoices job to use Collector as the input source](#).

However, this is not recommended since you will not be able to approve them in Verify as the supplier/buyer cannot be adjusted in Verify for XML invoices. You will have to send them to Optimize manually from Verify using the **Invoice > Send to Optimize** menu option to process them further.

To ensure that you do not miss the invoices that do not show up in Verify, do the following:

- Regularly check the Manager module for XML invoice definitions with status 99 (or custom status) that have invoices in the system.
- Regularly check Optimize (once a day/week, for example) for XML invoice definitions with status 99 or custom status that has been defined for them.
- Set up an Inbox in Verify to collect invoices that get stuck in the system.

## SmartXML reference

This section provides a quick-reference guide for how to get started processing XML invoices using Kofax ReadSoft Collector together with Kofax ReadSoft Invoices.

1. Gather at least one XML invoice (more is even better) from each supplier that you will receive XML invoices from.
2. Put the files in a folder, such as TestMaterial. This folder is only used to store your invoice examples. You can alternatively have a separate folder for each supplier if you have multiple invoice examples from each and want to keep them separate from other suppliers for ease of identification.
3. Install ReadSoft Invoices 6.1 and create a database for it.
4. Install Kofax ReadSoft Collector 6.5.0.11 on all ReadSoft Invoices client machines. For more information, see [Install Collector with Invoices](#).
5. Create database for Kofax ReadSoft Collector 6.5.0.11 (this can be installed in the same database with ReadSoft Invoices). For more information, see [Create or connect to Collector database](#).
6. Define an input source that gets XML files from a folder, such as XML\_FilesToltrp. For more information, see [Add input sources](#) and [Configure an input source to retrieve XML invoices from a file folder](#).
7. Configure General settings in ReadSoft Collector. For more information, see [Configure an input source that retrieves email using EWS](#).
8. Define a job. For more information, see [Configure Invoices job to use Collector as the input source](#).
9. Copy an XML invoice from Supplier A to the XML\_FilesToltrp folder from step 6.
10. Start the Interpret job defined in step 8.

11. Review the invoice in Verify and send the invoice for optimization by selecting the **Invoices > Save to Optimize** option.
12. Open the Optimize module, optimize the XML invoice definition, and record the invoice's identification number (*IDnr NNN*). Do the following for each of the sections of the invoice that contain fields (Supplier, Buyer, Fields, and Line items):
  - Use best practices to optimize the fields (For more information, refer to "Best practices for optimizing XML invoices" in the ReadSoft Invoices help).
  - Add any fields that are missing in the layout (For more information, refer to "Adding missing fields to XML invoice definitions" in the ReadSoft Invoices help)
  - Remove any unnecessary fields (For more information, refer to "Removing unnecessary fields from XML invoice images" in the ReadSoft Invoices help).
  - Adjust rule to find the value for the field (For more information, refer to "Creating rules to map values for fields in XML invoices" in the ReadSoft Invoices help).
13. When you are satisfied with optimization, save the definition, close the XML Field Mapper, and select **Yes** when asked if you are finished optimizing.
14. In the Kofax ReadSoft Invoices Manager module, delete the ReadSoft Invoices invoice definition that has the *IDnr NNN* identification number that was recorded in step 12. If invoices have already been processed using this invoice definition, they must be deleted from the database before the invoice definition can be deleted.

**Note** This step needs to be done when you click **Save definition** in the XML Field Mapper even if nothing was changed.

15. Put the same file back in the Input folder and run the same Interpret job again.
16. Check the invoice in Verify. If everything appears to be correct, do the same process for invoices from Supplier B starting from step 9. However, if there are still things that need to be adjusted, return to step 12.
17. When invoices from all of your suppliers have been optimized using these steps, you can begin processing them in production by either putting all XML invoices that are to be processed in the XML\_FilesToltrp folder or by processing the emails that have XML attachments.