DOCUMENTS 7

Installation Guide

September 2013 – ReadSoft AB

10092013.0110

Contents

Preparing for installation

Installation overview

Before installing DOCUMENTS, note the overall procedure for installing all the necessary software on both servers and workstations. Following these steps ensures that no part of the installation is overlooked and that installation on multiple workstations is consistent.

1. Set up Microsoft SQL Server. (See *Installing and Configuring Microsoft SQL Server For Use With DOCUMENTS 7*, a ReadSoft document available in the `Documentation` folder on the installation CD.)

2. Set up the license server. See *DOCUMENTS 7 Licensing Procedures*, another ReadSoft document available in the `Documentation` folder on the installation CD.

   Exception: The license server is not required if you are going to run the DOCUMENTS installation using a trial license.

3. Install DOCUMENTS on one workstation (described on page 7), specifying the license server and SQL server. It is also possible to specify the license server after the installation (described on page 37).

4. Set up the DOCUMENTS databases (described on page 12). If possible, create a configuration file (described on page 35). Save the file where it is accessible from other workstations in the network.

5. Install DOCUMENTS on any additional workstations and servers, using the configuration file you created (if any). (Command-line installation is described on page 17.)

6. Install the DOCUMENTS Service (described on page 10) wherever DOCUMENTS is to run as a Windows service.

7. Install A2iA drivers (described on page 23) on workstations and servers used to sort documents requiring extraction in completely handwritten documents.

8. Install Python 2.5 (from DOCUMENTS 7.2 SP1 and higher.)

9. Install Web Verify, if needed (described on page 24).

10. Install add-ons as needed (described on page 32).

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System requirements

For detailed system requirements and advice on hardware configuration, please refer to the *System Configuration Guide*, which is available in the `Documentation` folder on the installation CD.

Tips for improving performance in high-volume systems

- Run SQL Server on its own server. (Refer to I*nstalling and Configuring Microsoft SQL Server For Use With DOCUMENTS 7*, which is available in the `Documentation` folder on the installation CD.)

- Use a dedicated database server (see page 15).

- Use only TCP/IP.

- Use switched Ethernet.

- For improved performance, use UNC paths instead of mapped drives ("R").

- Read "Users, user groups, and roles: Overview" in *DOCUMENTS Help*. Use the Administration module to set up users, user groups, and roles.

Accessing the installation programs

1. Exit all Windows programs. (Always close all other programs before installing DOCUMENTS or its components.)

2. Insert the installation CD. The installation menu is displayed.

   If the installation program does not start automatically, click **Start** menu > **Run** and enter `X:\AUTORUN`, where X is the drive letter for the CD-ROM drive.

3. Click **Install Software**.

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Installing DOCUMENTS

Installing the DOCUMENTS programs

🔴 **Before installation**

- Ensure that system requirements are met. (Refer to the *System Configuration Guide*, which is available in the `Documentation` folder on the installation CD.)

- Install Microsoft SQL Server. (Refer to *Installing and Configuring Microsoft SQL Server For Use With DOCUMENTS 7*, also available in the `Documentation` folder.)

- Install the license server. (Refer to *DOCUMENTS 7 Licensing Procedures*, also available in the `Documentation` folder.)

  Exception: The license server is not required when installing a demo, since DOCUMENTS comes with a trial license by default.

During the installation procedure, follow the instructions on the screen. Command-line installation is described on page 17.

Video instructions

To see a video demonstration of the installation procedure, click the image to the right.

1. On the **Install Software** tab of the autorun program (see page 5), click **DOCUMENTS 7**.

2. If you are prompted to install prerequisites, click **Install**.
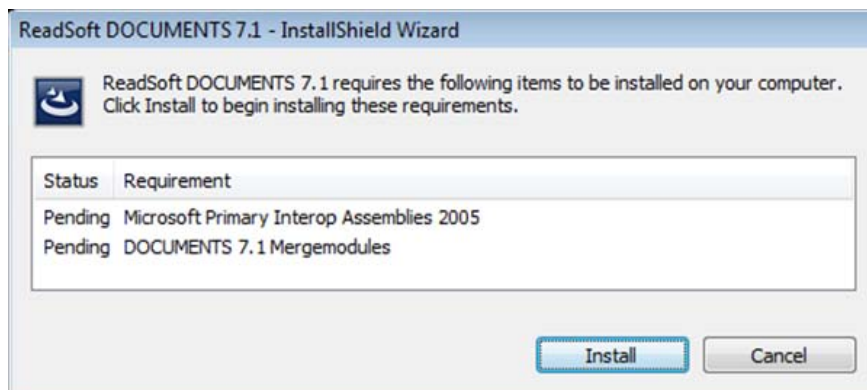
3. Click **Next**.

4. Optional: Click **Change** and specify where you want DOCUMENTS to be installed. Otherwise, the default directory, `C:\Program Files\ReadSoft\DOCUMENTS`, is used.

5. Click **Next**. The **DOCUMENTS – SQL Server** dialog is displayed.

6. Optional: Select **Use configuration file** to apply previously saved database settings (see page 35). Navigate to the file (the default file is `C:\CSConfiguration.ini`) and skip the next few steps.

7. Select the SQL Server that your DOCUMENTS installation will use.
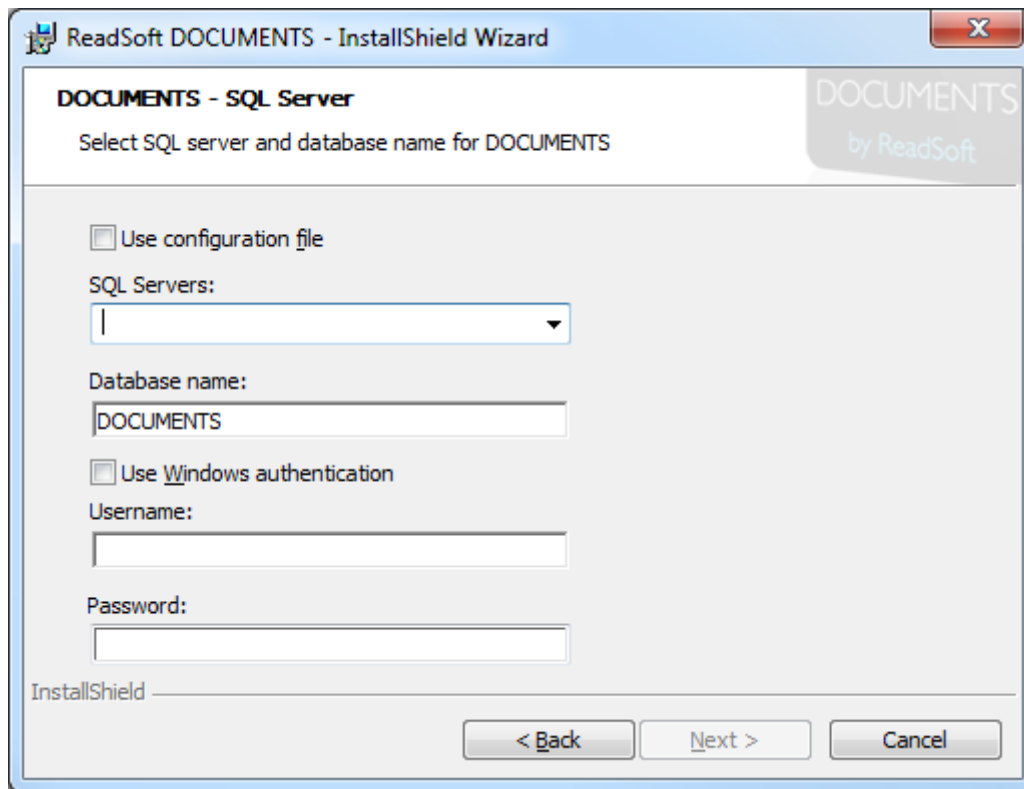

8. Specify the database name. Normally this is DOCUMENTS.

9. Now you must select how to connect to the database:

   • To use Windows authentication, select **Windows authentication** and continue to the next step.

      ℹ **Note:** In this case you must also select **Windows authentication** when you create the databases (see page 13).

- Or, specify the user name and password that DOCUMENTS will always use (no matter which user is using the program) to connect to the databases.

  ⓘ **Note:** In this case you must specify the same user name and password when creating the databases (see page 14).

  ⓘ **Note:** The password is not encrypted in the Windows Registry, as it was in previous versions of DOCUMENTS. If you need more security, use Windows authentication (see above).

10. Click **Next**.

11. The **DOCUMENTS – License Server** dialog is displayed. Specify the license server.
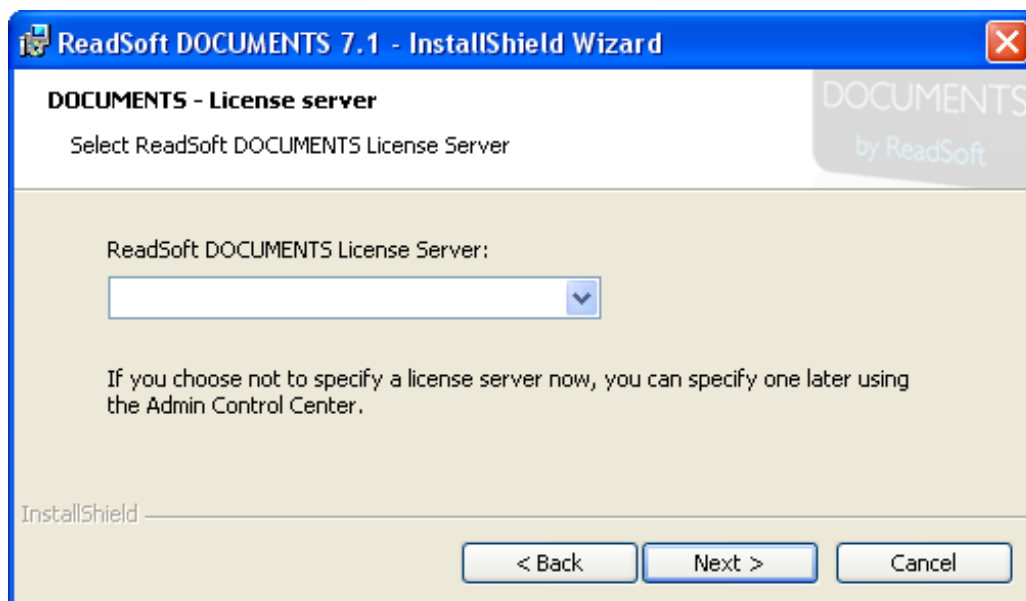
If necessary, you can specify the license server after installation, instead. The procedure is described in *DOCUMENTS 7 Licensing Procedures*, a ReadSoft document available in the `Documentation` folder on the installation CD and in each installation.

12. Click **Next**.

13. Click **Install** to install DOCUMENTS according to the settings you have just specified. The installation may take several minutes.

14. When the **InstallShield Wizard Completed** dialog confirms that the installation is complete, click **Finish**. The HASP SRM drivers—for the licensing service—are installed automatically at this point.

If you intend to run Production as a service

After installing DOCUMENTS, you need to install the DOCUMENTS service on any client, normally an application server, where Production is to run as a Microsoft Windows Service.

1. On the **Install Software** tab of the autorun program (see page 5), select **DOCUMENTS Service**.

2. Click **Next** when the InstallShield Wizard starts.

3. In the **Logon Information** dialog, specify the standard user to be associated with running the services. Or, leave this information blank and specify it in the properties of the service after the installation.

   > **Note:** When specifying a user, the **User account** format is *domain name\user name* and the **Password** is the same password used to logon to the domain.

   Click **Next**.

4. The program is ready to install. Click **Install**.

5. When installation is complete, click **Finish**.

For information about running Production to run as a Windows service, including how to configure the service, please refer to *DOCUMENTS Help* topic "Production as a service: Overview."

> **Note:** The service is called **ReadSoft Production** in the **Services** dialog in Windows. If you switch databases (described on page 36) you must restart the service (see page 37).

Installing AppSight Black Box

AppSight Black Box software can be installed on servers and/or clients in order to record application execution at multiple, synchronized levels. Using the pre-defined recording profiles provided by ReadSoft, you can conveniently gather information from ReadSoft applications for use when submitting support cases.

For details on how to install and use Black Box, please refer to *Installing and Operating Black Box Version 7.5*, a ReadSoft document available in the `Documentation` folder in each DOCUMENTS installation, and on the installation CD in the `Software\Tools & third party software\BlackBox` folder.

> AppSight Black Box does not work with Windows 8 or Windows Server 2012.

Installing ReadSoft configuration tools

ReadSoft configuration tools are a collection of small programs that allow you to create the DOCUMENTS databases, create the knowledge store database, and so on.

🔴 If you are running Windows 8, Windows Server 2012, or are running an older OS and have SQL Server 2012 installed, you need to install the correct version of these pre-requisites *before* running ReadSoft Configuration Tools on a client or server. Install either the (x64) or (x86) versions, located on the DOCUMENTS 7 CD, depending on the installed SQL Server 2012 version.

- \Software\ReadSoft\Configuration Tools\ISSetupPrerequisites\Microsoft SQL Server 2008 Management Objects 10.00.2531

- \Software\ReadSoft\Configuration Tools\ISSetupPrerequisites\Microsoft SQL Server System CLR Types 10.00.2531

🔴 The configuration tools do not run on Windows XP 32-bit unless Service Pack 3 is installed, and do not run at all on Windows XP 64-bit. If you are using a 64-bit version of XP, install the configuration tools on a server, for example the database server, instead.

1. On the **Install Software** tab of the autorun program (see page 5), click **Configuration Tools**.

2. If prompted to install prerequisites, click **Install**.

3. Click **Next**.

4. Select the tools to be installed:

- **Configuration Tools Framework Files** – required to run either of the below items.

- **Configuration Tools Shell Files** – required to run the below items.

- **DOCUMENTS Database Tool** – creates the DOCUMENTS databases, DOCUMENTS and DOCUMENTS_PRODUCTION. Also used to switch between databases (see page 36).

- **Knowledge Store Database Tool** – creates the database used by the Knowledge Store Service (described on page 20).
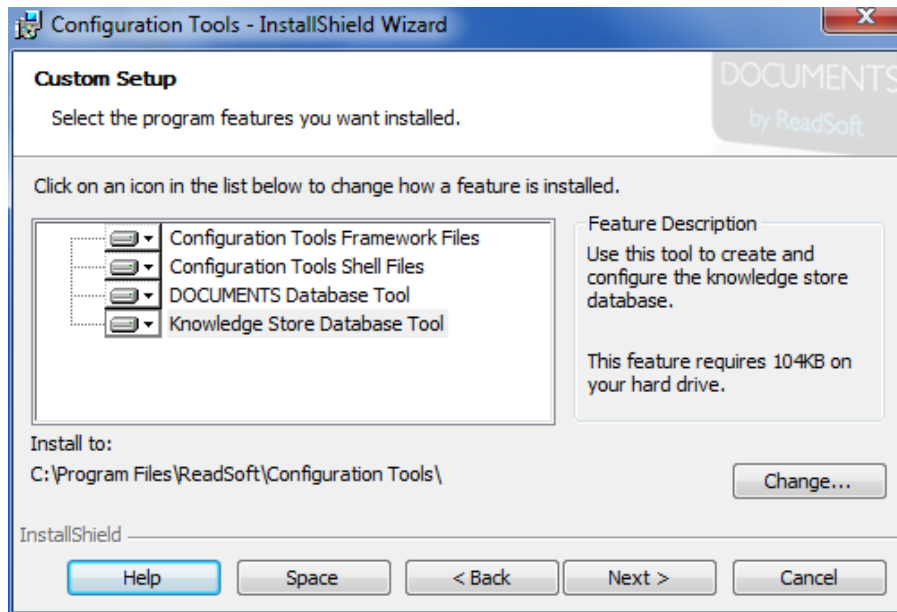
5. Click **Next**.

6. Click **Install**. The installation proceeds.

7. When installation is complete, click **Finish**.

Setting up the databases

After installing DOCUMENTS and ReadSoft configuration tools, use this procedure to create and initialize the two databases that DOCUMENTS uses.

ⓘ **Note:** To create a database that uses Windows authentication, you must be a Windows user with administrator rights.

To create a database that does not use Windows authentication, normally you must still at least be an administrator *on the computer*. If not, it is sometimes (depending on UAC settings) possible to enter administrator details and proceed.

Video instructions	
To see a video demonstration of the DOCUMENTS database setup, click the image to the right.	

1. Select **Start** menu > **All Programs** > **ReadSoft** > **Configuration Tools**.

2. In the navigation panel, select **DOCUMENTS** > **Database**.

3. Specify the SQL Server installation (**SQL Server** setting) where the databases are to be created.

4. In the **Database name** box, specify the name of the database to create (normally this is DOCUMENTS). (When you click **Create**, *two* databases are created, one with the name you specify and one with the extension _PRODUCTION.)

5. Now you must select how to connect to the database:

   - To use Windows authentication—both when creating the database and when accessing the database from DOCUMENTS:

     a) Select **Windows authentication**.

     b) At the bottom of the dialog, fill in the domain name and user (or Active Directory user group) that will need access to the database.

     Continue to the next step.

   - Or, specify the following details:

     a) In the **SQL Server login** and **SQL Server password** boxes, specify an administrator login name and password for the SQL Server installation that you specified in step 3. This user is used only to:

       ▪ Create the user name that DOCUMENTS will always use (no matter which user is using the program) to connect to the new databases (see step b).

       ▪ Create the databases (step 7).

b) In the **Database login** and **Database password** boxes, specify a login name and password that DOCUMENTS will always use (no matter which user is using the program) to connect to the databases.

   ℹ **Note:** The password will not be encrypted in the Windows Registry, as it was in previous versions of DOCUMENTS. If you need more security, use Windows authentication (see above).

6. Click **Test** to test the connection.

7. Click **Create**. (**Save** is used when *switching* databases – see page 36.) Two databases are created, and the Windows Registry is updated.

Using a dedicated database server

After setting up the DOCUMENTS databases, follow this procedure to dedicate the server to the database:

1. Select **Start** menu > **Settings** > **Control Panel** > **System**.

2. Click the **Advanced** tab.

3. Under **Performance**, click **Settings**.

4. On the **Advanced** tab, in the **Processor scheduling** box, select **Background services**.
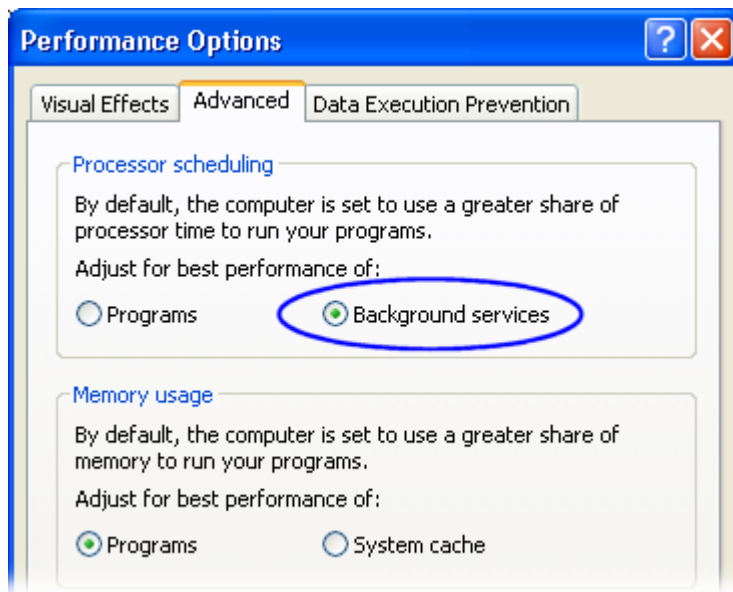
Setting up the databases manually, using SQL scripts

If preferred, you can manually create the DOCUMENTS databases, and then configure them using the SQL script files provided.

ⓘ **Note:** This procedure should only be performed by a database administrator or a ReadSoft consultant.

Before you begin

- Copy the three script files (`CreateTables.sql`, `GrantUser.sql`, and `CreateData.sql`) from the DOCUMENTS configuration tools folder (by default this is `C:\Program Files\ReadSoft\Configuration\Bin`) to another location.

  Do not delete or move the files. They are used by the configuration tools and you may need them later.

- Ensure that you have database permission to create databases and logins and to execute database scripts in SQL Server Management Studio.

Use this procedure

1. Start SQL Server Management Studio.

2. Create the first database named (for example) DOCUMENTS.

   This "Configuration database" will contain DOCUMENTS configuration data.

3. Create a second database named (for example) DOCUMENTS_PRODUCTION.

   This "Production database" will contain Invoice configuration data (if any), as well as all runtime data (documents, invoices, field values, etc.).

4. Create or add a SQL Server login. This login will also be used as the database user for both DOCUMENTS databases. If you want to use a Windows user name or Windows group name, then the user or group must exist in the Active Directory.

5. For each database, execute the SQL script `CreateTables.sql`.

6. In the `GrantUser.sql` script, change these parameters:

   - `$(databasename)` – the name of the Configuration database that you created in step 2 (for example DOCUMENTS).

   - `$(user)` – the user name (same as the SQL Server login that you created in step 4).

7. Execute `GrantUser.sql` for each database.

8. In the `CreateData.sql` script, change these parameters:

- `$(server)` – the name of the SQL Server.

- `$(databasename)` – the name of the Production database that you created in step 3.

- `$(user)` – the user name (same as the SQL Server login, see step 4). Leave this empty if you are using Windows authentication.

- `$(encpwd)` – the user password. Leave this empty if you are using Windows authentication.

9. For the Configuration database that you created in step 2, execute the SQL script `CreateData.sql.`

Script	What it does
`CreateTables.sql`	Creates the database structure for DOCUMENTS. Execute this script for each database (Administration and Production databases).
`GrantUser.sql`	Adds the roles 'db_datawriter', 'db_datareader', and 'db_ddladmin' to the user, and grants Execute rights for all stored procedures to the user. Execute this script for each database (Administration and Production databases).
`CreateData.sql`	Updates the **runtimesystems** table with server name, database name, user name, and password. Execute this script on the Administration database.

Command-line installation (and removal)

As an alternative to the normal installation procedure, a system administrator can automate installation. This section describes how to perform a command-line installation of DOCUMENTS.

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.

These instructions assume that the databases are already created. (See "Setting up the databases" on page 12 for instructions.)

Full installation

Using these command-line options, a full installation (or uninstall) of DOCUMENTS is performed on the workstation.

Suggested command & switches	Description
`"setup.exe" /v"/qb!"`	DOCUMENTS is installed, and the most basic user interface is shown during the process.
`"setup.exe" /v"/qn"`	DOCUMENTS is installed, and no user interface is shown during the process.
`"setup.exe" /x /v"/qb"`	DOCUMENTS is uninstalled, and a basic user interface with a **Cancel** button is shown during the process.
`"setup.exe" /x /s /v"/qb!"`	DOCUMENTS is uninstalled, and a silent installation is performed with the most basic user interface.
`"setup.exe" /v"/l*v c:\setup.log"`	DOCUMENTS 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 setup.exe.

Suggested command & switches	Description
`Setup.exe /v"CSCFGFILE=c:\csconfiguration.ini"`	Installs to the default directory, using CsConfiguration.ini to set all necessary database values.

Suggested command & switches	Description
`Setup.exe /v"/qn INSTALLDIR="C:\Program Files\Documents" LICSERVER=RS-LICENSE SQL_DBNAME=DOCUMENTS SQLSERVER=RS-SQL SQL_USERNAME=<value> SQL_PASSWD=<value>"`	Installs to `C:\Program Files\ReadSoft\Documents` and uses the "DOCUMENTS" database on the SQL Server located at RS-SQL, and the license server RS-LICENSE, without displaying any dialogs or messages.

"Setup.exe" may need to be adjusted to the path where the file is located, depending on where the command is executed from.

Switches:

/x = uninstall

/s = completely silent installation – must be used with /v and at least one of its parameters (see below).

/v = InstallShield passes the parameters that follow it to the underlying .msi package (Windows Installer). Some commonly used parameters:

"/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)

The parameters must be within *one* set of quotation marks, and multiple parameters must be separated by a space, as shown in this example:
`"setup.exe" /x /v"/qb! /l* install.log"`

Other available switches and parameters are explained here:

- InstallShield: Flexera Software Knowledge Base Article Q105473: INFO: Setup.exe Command-Line Parameters

- Windows Installer: Microsoft Knowledge Base, "Command-Line Switches for the Microsoft Windows Installer Tool"

Public properties to use for installation

- SQLSERVER – SQL server host name.

- LICSERVER – License server host name.

- SQL_DBNAME – database name.

- SQL_USERNAME – login name that DOCUMENTS will use to connect to the databases. (This corresponds to the user name you specified in the **Create main databases - User information** dialog.)

- SQL_PASSWD – password that DOCUMENTS will use to connect to the databases. (Corresponds to the password you specified in the above mentioned dialog.)

- CSCFGFILE – database configuration file. (Used instead of the above properties.)

Use the **/v** switch to pass the properties to Msiexec. Use quotation marks as shown in the examples above.

Installing and configuring Knowledge Store

DOCUMENTS Knowledge Store Service results in better extraction of header fields (single fields, for example customer number) and table fields. It is recommended in customer order solutions, and in solutions that process invoices without using the Invoice modules.

Video instructions

To see a video demonstration of the Knowledge Store installation procedure, click the image to the right.

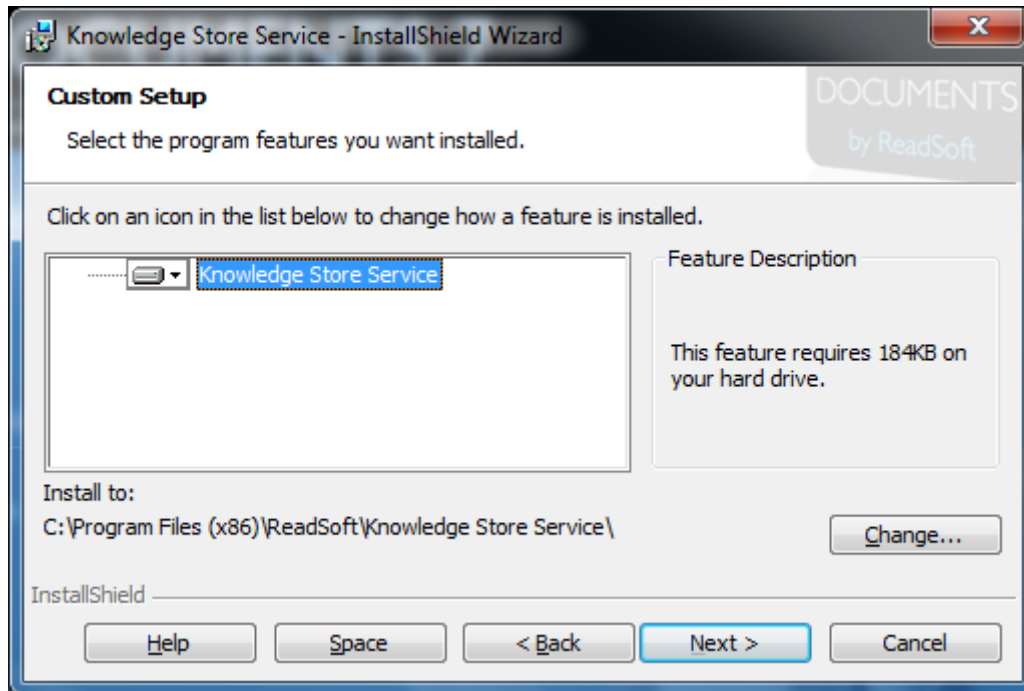## Installing the Knowledge Store Service

Install DOCUMENTS Knowledge Store Service on a PC that has access to a Microsoft SQL Server installation. (Knowledge Store Service supports the same versions of SQL Server as DOCUMENTS.)

Knowledge Store Service uses a separate database from DOCUMENTS, and it does not have to reside on the same PC as SQL Server or any of the other DOCUMENTS components.

1. On the **Install Software** tab of the autorun program (see page 5), select **Knowledge Store Service**. This starts the installation program.

2. Follow the online instructions.

The installation program registers the service. However, you must start the service manually (see page 23).

Creating the knowledge store database

Video instructions

To see a video demonstration about how to create the knowledge store database, click the image to the right.

This procedure requires that you installed the ReadSoft configuration tools (as described on page 11), including **Knowledge Store Database Tool**.

1. Select **Start** menu > **All Programs** > **ReadSoft** > **Configuration tools**.

2. In the navigation panel, select **Knowledge store** > **Database**.

3. Type in the settings:

- **SQL Server*** – the SQL Server installation where Knowledge Store will have its database.

- **SQL Server login** and **SQL Server password** – a user login name and password for accessing the database server. The user must be an administrator with permission to create the database and add other database users.

  The server login details are not saved with the settings, so these must be entered each time you want to test or update these settings.

- **Database name*** – a name for the knowledge store database. (This will be created if you click **Create**.)

- **Database login*** and **Database password*** – a user name and password that the Knowledge Store Service can use to access to the database.

  The user you specify will be created if you click **Create**. The user will have read/write access to the database. It is only used by the Knowledge Store Service and does not need to be specified anywhere else (for example inside DOCUMENTS).

4. Click **Create** to create the database and the database user. (**Save** is used when *switching* databases – described on page 36 – or updating the stored settings.)

* The settings are saved in a configuration file: `C:\Users\All Users\ReadSoft\Documents\KnowledgeStore\ReadSoft.KnowledgeStore.Database.config`.

Starting the service

Initially, you must start "ReadSoft Knowledge Store Service" on the server where you installed it. After that, the service should restart automatically if the PC is rebooted.

Video instructions	
To see a video demonstration about how to start and enable the Knowledge Store Service, click the image to the right.	READSOFT video demo ▶ Starting and Enabling Knowledge Store Service

1. Select **Start** menu > **Control Panel** > **Administrative Tools** > **Services**.

2. In the list of services that is displayed, right-click **ReadSoft Knowledge Store Service** and select **Start**.

   Note: If you switch databases (described on page 36) you must restart the service (see page 37).

Enabling Knowledge Store

Activate Knowledge Store in the **Global policies** > **Persistence policy** dialog. Please refer to the *DOCUMENTS Help* topic "Running Knowledge Store Service to aid extraction from table fields."

Installing A2iA services and Python 2.5

Installing A2iA services

Although the A2iA interpretation engine, required for extraction of completely handwritten documents, is installed automatically along with DOCUMENTS, you also need to install the A2iA and Sentinel services.

- If you are going to run production locally, install these services on the local machine.
- If you are going to have a dedicated server to use A2iA over a network, install these services on the server.

Use this procedure:

1. On the **Install Software** tab of the autorun program (see page 5), select **A2iA services**.

2. Click, **Next** then **Install**.

3. When the installation is complete, click **Finish**.

4. If the Sentinel services are not already present, the **Sentinel Protection Installer** is displayed and automatically installs the necessary services. (Uninstalling DOCUMENTS does not remove the Sentinel Protection Installer. It needs to be uninstalled manually.)

Installing Python 2.5

From DOCUMENTS 7.2 SP1 or greater, you need to install Python 2.5 in order to be able to use A2iA.

Use this procedure:

1. On the installation CD, navigate to the `Software\Tools & third party software\Python 2.5` folder.

2. Double-click the python-2.5.msi file to start installation.

3. Click **Next** and follow the installation instructions, being sure to install Python on the same drive where you installed DOCUMENTS.

4. Click **Finish** when the installation is complete.

Installing Web Verify

Overview

Web Verify provides an alternative to using the Invoice Verify module to verify invoices. Verify operators use a browser (Microsoft Internet Explorer is recommended) to log on and connect to the DOCUMENTS system.

Web Verify can be used in DOCUMENTS 7 for invoices that are based on any of the document specification templates called "Invoice..." (for example "Invoice USA 6.0 PO").

Requirements and recommendations

- The invoice images must be accessible from the Web Verify server. In other words, the system must be configured to use global image paths.

- You must configure the global image folder to allow access by "Internet Guest Account".

- The Web Verify server must run one of these operating systems:

  Windows Vista*   Windows Server 2008
  Windows 7*   Windows Server 2008 R2

  *Max. 10 concurrent users.

- Web Verify requires user authorization. You must enable user authorization for Invoice Verify and define users before beginning to use Web Verify. Use the Invoice Manager module to do this. Instructions can be found in *DOCUMENTS Help*.

  ⓘ **Limitation:** At the time of this writing, you cannot set up Web Verify to use a network user. Select **Local user** in the **User selection** settings.

- Web Verify uses the inbox to make invoices available for verifying. Therefore, create an inbox before using Web Verify. Use the Invoice Manager module to configure an inbox. Instructions can be found in the *DOCUMENTS Help* topic "Creating an inbox."

- If the Invoice system contains many buyers, the folder structure that is automatically created in the Inbox can be very slow in Web Verify. There are two solutions to this problem:

  - Assign buyers to different *roles* in the Invoice user authorization.

  - Create your own "hierarchy" that sorts buyers into the same folder. This will make the invoice list much faster in Web Verify.

  Related topics in *DOCUMENTS Help*: "Editing roles and users for the inbox view in Invoice modules" and "Creating an inbox."

- Processing batches: When setting up batches, do not use the **Keep batch together** setting with Web Verify.

Known issues and limitations

There is a detailed list of known issues and limitations in the *System Configuration Guide*, which is available in the `Documentation` folder on the installation CD. Also see the Readme file for last-minute information.

Technical overview

Web Verify consists of:

- The client application – based on Microsoft Silverlight technology. Executes inside a web browser. No installation is required on the client except Silverlight. Microsoft Internet Explorer is the preferred choice of browser. However, Web Verify works with all web browsers that can run Silverlight applications.

- The server application, which in turn consists of (1) the web application that is hosted inside Microsoft Internet Information Services (IIS); and (2) a Windows service (including in the DOCUMENTS installation) that connects to the DOCUMENTS database and serves the web application with invoice data.
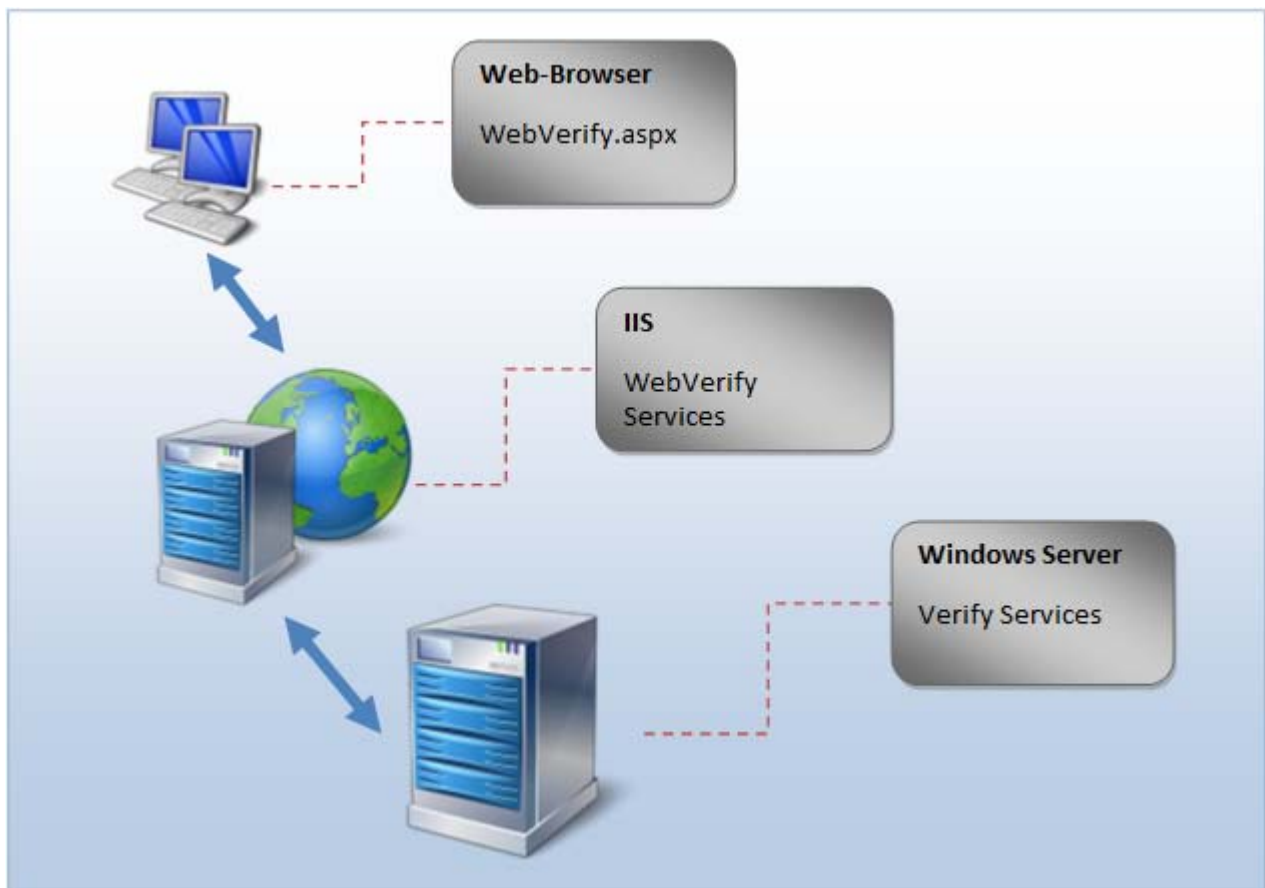
Installing the Web Verify web application

What the installation program does:

- Installs the full version of Microsoft .NET Framework 4.0, unless it is already installed.

- Copies the web application to the `Program Files` folder.

- Sets up a virtual directory called WebVerify in the IIS, and in that virtual directory:

    - Changes the access flags to 513.

    - Sets the default document (DefaultDoc) to `Default.aspx`.

    - Sets integrated security to False.

    - Sets the ASP.NET version to 4.0.

- Creates an application pool called WebVerifyAppPool.

- Connects the virtual directory to the application pool.

- Registers the MIME type xap (Silverlight applications).

Before installation

The installation should be performed by someone who is familiar with server applications. You install the Web Verify web application on the Windows server that runs IIS version 7. Before you do so:

- Ensure that IIS is turned on, that ASP.NET is included in the IIS installation, and that the IIS 6 Metabase Compatibility feature is present:

    - **On Windows 7 or Windows Vista**, select **Start** menu and type/select **Turn Windows features on/off**. Ensure that **Internet Information Services** is on.

      Then expand **Internet Information Services** > **Web Management Tools** > **IIS 6 Management Compatibility**, and ensure that **IIS Metabase and IIS 6 configuration compatibility** is selected.

      Additionally, expand **Internet Information Services** > **World Wide Web Services** > **Application Development Features**, and ensure that **ASP.NET** is selected.
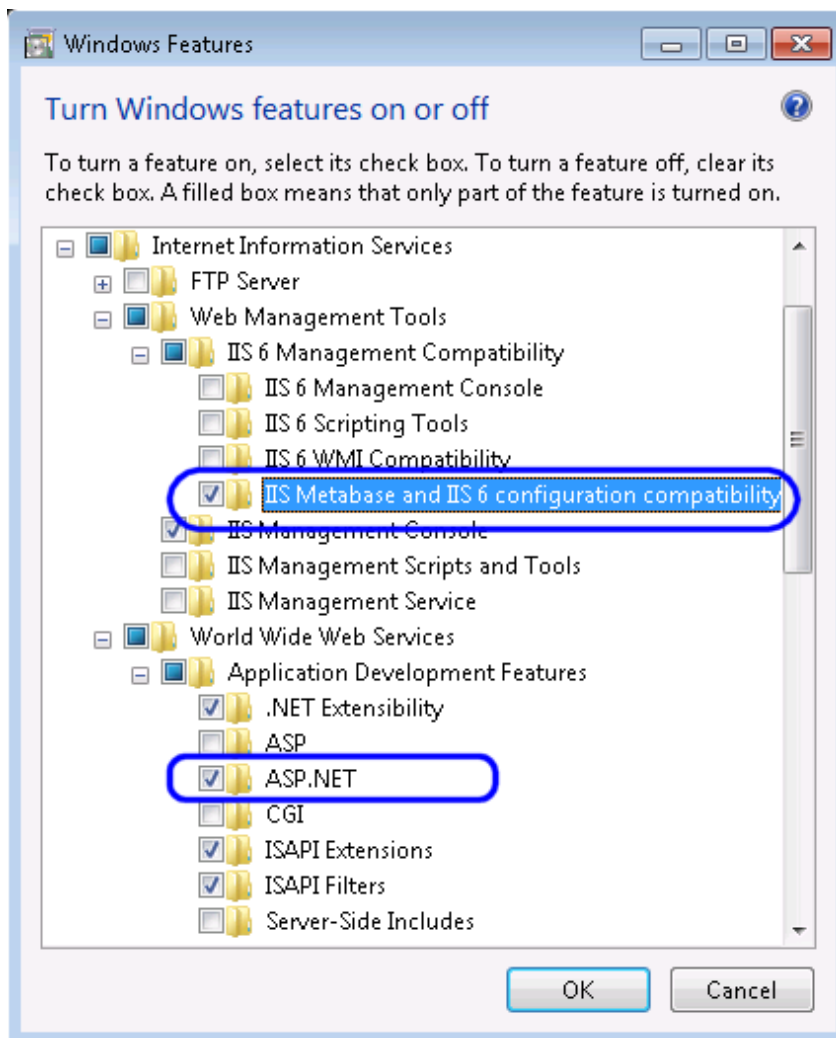
- **On Windows Server 2008 or Windows Server 2008 R2**, select **Start** menu > **All Programs** > **Administrative Tools** > **Server Manager**. Click **Add Roles** and select **Web Services (IIS)**.

   In the **Role Services** settings, expand **Management Tools** > **IIS 6 Management Compatibility** and ensure that **IIS Metabase Compatibility** is selected (installed).

   Additionally, expand **Web Server** > **Application Development**, and ensure that **ASP.NET** is selected (installed).
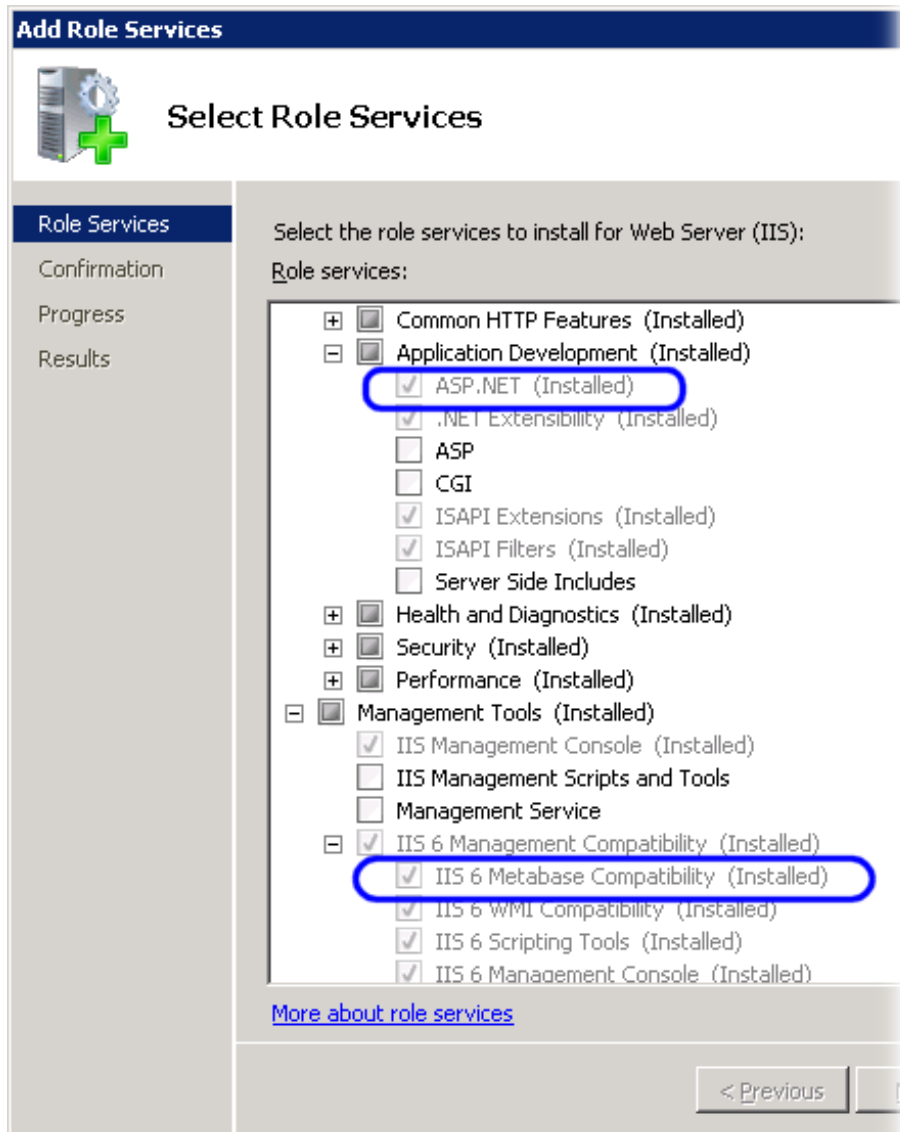
Installation

1. On the **Install Software** tab of the autorun program (see page 5), select **DOCUMENTS Web Verify for IIS** and follow the online instructions. You will be prompted to enter the name of the Web Verify application server. Change **localhost** to the name of the computer hosting the Web Verify application server.
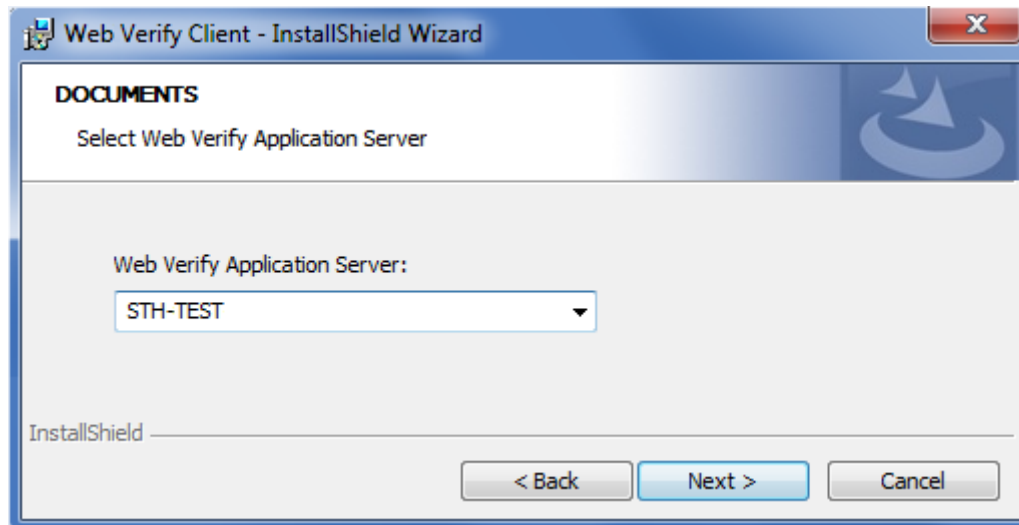

2. Ensure that port number 9304 is open between the IIS computer and the computer running the Web Verify application server.

Start the service on the Web Verify application server

The Web Verify service is installed with DOCUMENTS 7. (It cannot be installed separately.) However, you must activate it:

1. Select **Start** menu > **Control Panel** > **Administrative Tools** > **Services**.

2. In the list of services that is displayed, right-click **INVOICES Verify API** and select **Properties**.

3. Set **Startup type** to **Automatic**.

4. Click **Log on** and select **This account**.

5. Type the account and password that the service is to use.
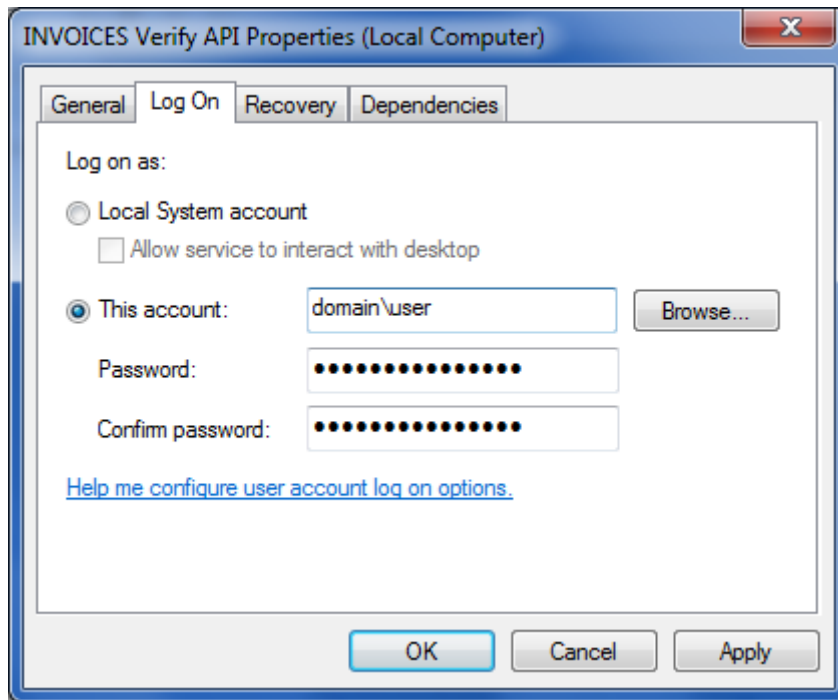
ⓘ **Note:** The account that you specify must have read, write, and DDLAdmin rights.

6. Start the Invoice Manager module. (Then close it – or keep it open for your own use.)

7. Start the service.

ⓘ **Note:** If you switch databases (described on page 36) you must restart the service (see page 37).

Configuring and using Web Verify

In order to use Web Verify, the DOCUMENTS system must, of course, be set up first. Specifically, an inbox must be created, as well as (optional) roles and user profiles for the Verify operators. The procedures are described in detail in *DOCUMENTS Help* – start with "Creating an inbox" and "Editing roles and users for the inbox view in Invoice modules."

If you simply want to check that the Web Verify server is configured correctly, try starting any DOCUMENTS module (for example Invoice Verify). If a DOCUMENTS module can start, then Web Verify will also work.

To start the Web Verify client application after installation and setup, navigate to:

```
http://<web-address-of-IIS-computer>/WebVerify
```
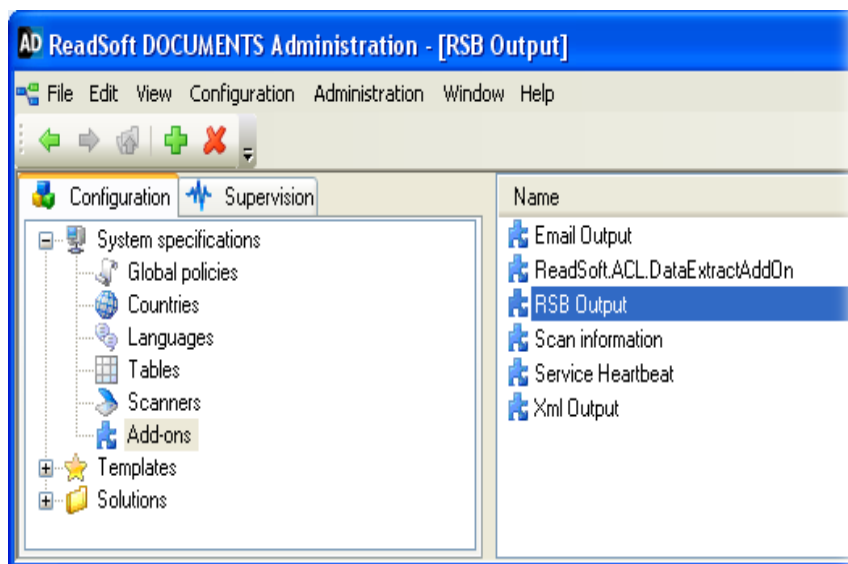
For help while using Web Verify, click the **Help** button.

Installing and configuring add-ons

Some add-ons are included in the DOCUMENTS installation package.

DOCUMENTS add-ons

To see which add-ons are included, use the Administration module and select **System specifications** > **Add-ons**:

🛈 **Note:** The REPORTER (Data Collection) add-on cannot be used unless you also install and extensively configure REPORTER itself. Please refer to *REPORTER Installation Guide*, available on the **Documentation** tab of the autorun program.
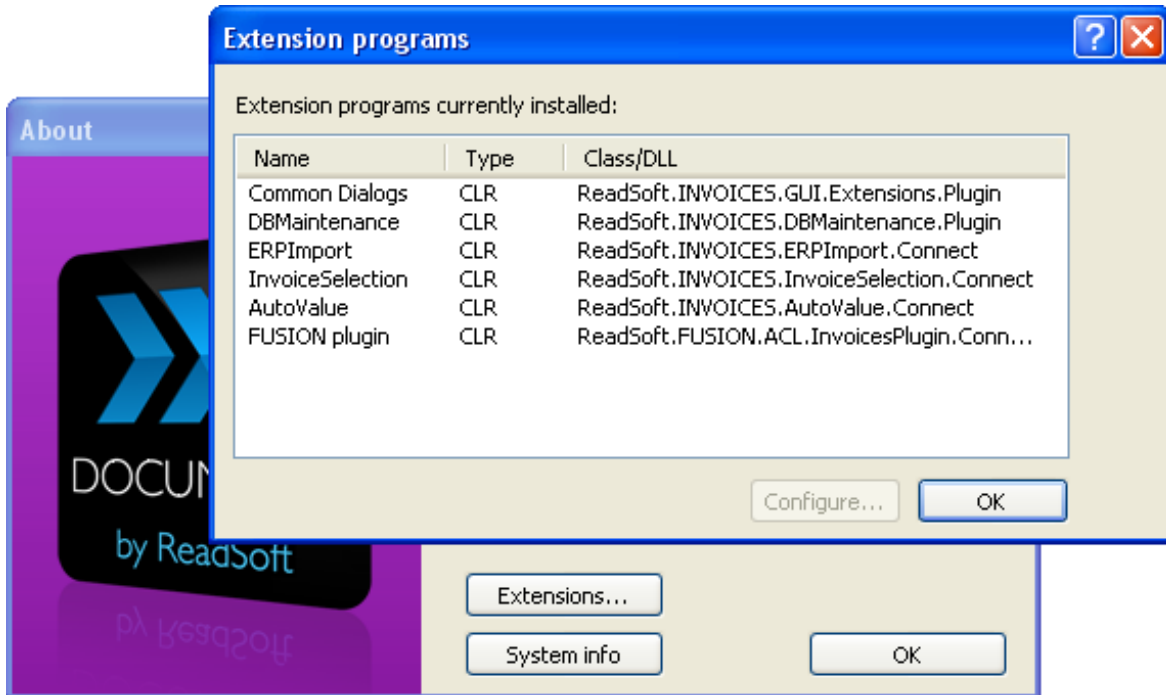
Additional add-ons that you require must be installed separately. This includes:

▪ ReadSoft Service Bus (the DOCUMENTS-to-PROCESS DIRECTOR connector). Installation files and documentation are available in the `Software\ReadSoft\RSB` folder on the installation CD.

▪ The COLLECTOR add-on for DOCUMENTS. On the **Install Software** tab, click **COLLECTOR**.

Add-ons must also be *configured*. Please refer to "Configuring an add-on" in *DOCUMENTS Help* for more information.

Invoice module add-ons

To see which add-ons are included, use the Invoice Manager module and select **Help** >
About. In the dialog that is displayed, click **Extensions**.

Some extensions can be configured from the **Extension programs** dialog shown above.
Select the extension and then click **Configure**.

Additional add-ons that you require must be installed separately. Updates are made to the
initialization file `Eilocal.ini`. Sometimes those updates are done automatically when you
install an add-on. Other times those updates must be done manually. Please refer to "Plugins
sections in Eilocal.ini" in *DOCUMENTS INI File Help* (`DOCUMENTS-INI-File-Help.chm`)
for information.

Installing DOCUMENTS API Help

API Help for the Invoice modules (`INVOICES-API.chm`) is installed with DOCUMENTS.

API Help for the main DOCUMENTS programs must be installed separately. Use this procedure to merge it with the built-in help in Microsoft Visual Studio:

1. Copy the API help folder, `Software\ReadSoft\DOCUMENTS\API Help`, to your workstation. The folder must remain in this location in order for API Help to function.

2. Open the folder and run the `InstallAPIHelp.bat` file.

3. Start Visual Studio and access API help, for example by pressing **F1**.

4. On the **Contents** tab, locate and expand the **ReadSoft DOCUMENTS** node.

5. Under this node you see **ReadSoft DOCUMENTS API**.

Post-installation setup

CSConfiguration.ini

This is the default name of a file that contains database configuration settings.

Normally there is an option to create this file during the process of creating the DOCUMENTS databases. However, at the time of this writing that option is not available.

ⓘ Until the configuration file can once again be created during installation, you must create your own configuration file, if needed. Contact your ReadSoft representative if you need information about this.

Such a configuration file can be used:

▪ For backup.

▪ To configure two or more installations to use the same databases, for example during command-line installation.

▪ For the **Use configuration file** option that you can select during the standard installation procedure (see step 6 on page 8).

By default, the file is `C:\CSConfiguration.ini`. If you are setting up a large installation with many workstations, consider placing this file in a logical location on a server where all workstations can access it.

ⓘ **Note:** If you open the file using a text editor, you will see information about only the DOCUMENTS database. However, the DOCUMENTS database also contains information about the DOCUMENTS_PRODUCTION database. Thus, in effect, the file covers both databases.

Switching between databases

If you have two or more pairs of DOCUMENTS databases, for example a test system and a production system, use the below procedure to switch.

This procedure can also be used to switch from one knowledge store database to another.

1. Close all DOCUMENTS modules.

2. Select **Start** menu > **All Programs** > **ReadSoft** > **Configuration Tools**.

3. Click **DOCUMENTS > Database** (or **Knowledge Store** > **Database**).

4. Adjust the settings to reflect the database that you want to switch to. The settings are described in detail starting on page 13 (for the DOCUMENTS databases) and 22 (for the knowledge store database).
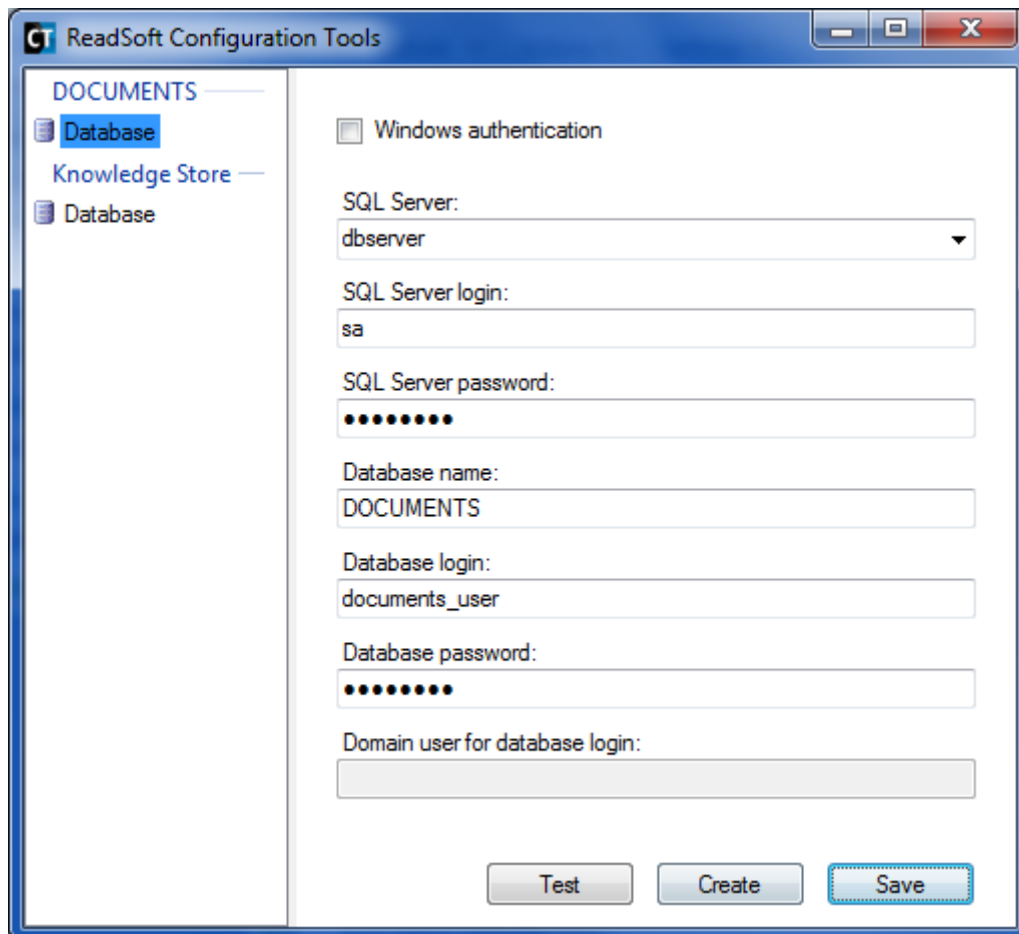
5. Click **Test** to test the connection.

6. Click **Save**. This updates the Windows Registry. When you start a DOCUMENTS module, it will access the database that you just accessed.

Restarting Windows services

After switching databases, you must restart all relevant Windows services. This includes INVOICES Verify API (which is the Web Verify Service), ReadSoft Production Service, and ReadSoft Knowledge Store Service.

Instead of clicking **Restart**, we recommend this procedure:

1. Click **Stop**.

2. Wait 10 seconds.

3. Click **Start**.

Starting the License Manager service manually

Normally the Sentinel HASP License Manager service starts automatically on each workstation where DOCUMENTS is installed. Use this procedure to start it manually, if necessary:

1. Select **Start** menu > **Control Panel** > **Administrative Tools** > **Services**.

2. In the list of services that is displayed, find **Sentinel HASP License Manager** and check the value in the **Status** column.

   If the status is not "Started," right-click **Sentinel HASP License Manager** and select **Start**.

Specifying a license server

If you did not specify a license server during installation when the **DOCUMENTS – License Server** dialog was displayed (see step 11 on page 9), you can specify it afterwards. The procedure is described in *DOCUMENTS 7 Licensing Procedures*, a ReadSoft document available in the `Documentation` folder on the installation CD and in each installation.

Database maintenance and backup

It is essential that you establish and carry out maintenance and backup routines that are appropriate to your system. For information about that, as well as error prevention and troubleshooting, please refer to *Installing and Configuring Microsoft SQL Server For Use With DOCUMENTS 7*, a ReadSoft document that is available on the installation CD. On the main menu, click **Documentation**. Then click the SQL Server document.
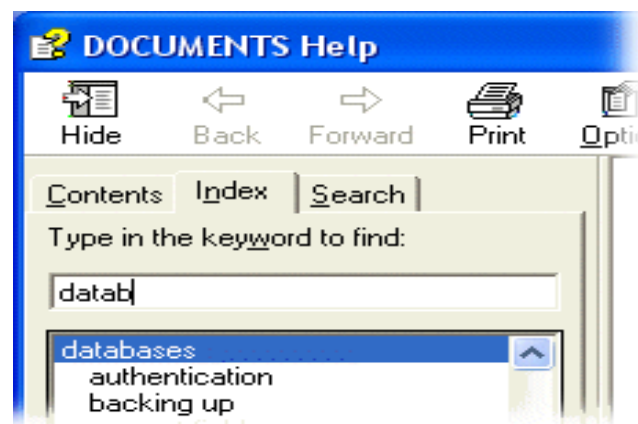
If there is a power failure, or if a DOCUMENTS process is terminated unnaturally for any other reason, the databases can become corrupt. In most cases, the network database server handles such situations and you need only restart the process.

Additional information about DOCUMENTS databases can be found in *DOCUMENTS Help*. For a list of topics related to databases, click the **Index** tab. Then type *databases* in the box.

User authorization

DOCUMENTS has a user authorization system (login system) that is disabled by default. The default user **Administrator**, which has no password, should be deleted after you set up your own users. Adjust user management settings according to instructions in *DOCUMENTS Help*.

Invoice modules have their own user authorization. This is also documented in *DOCUMENTS Help*.

Windows user rights

All DOCUMENTS users must have the ability to create subdirectories in two different Log folders. Their exact location depends on the operating system. In a default installation, these folders are:

- Default location in Windows XP and Windows Server 2003 SP2:
  `C:\Program Files\ReadSoft\DOCUMENTS\Invoices\Log`

  Default location in the newer operating systems:
  `C:\Users\Public\ReadSoft\DOCUMENTS\Invoices\Log`

  Otherwise as specified by the LogFile setting in `Eilocal.ini`.

- Default location in Windows XP and Windows Server 2003 SP2:
  `C:\Documents and Settings\`*UserName*`\Local Settings\Application Data\ReadSoft AB\DOCUMENTS\Logs`

Default location in the newer operating systems:

`C:\Users\`*`UserName`*`\AppData\Local\ReadSoft AB\DOCUMENTS\Logs`

Otherwise as specified as described in "Setting up logging" in *DOCUMENTS Help*.

Configuring your A2iA license

To be able to use A2iA in Sort or Extract activities, you need to specify where the A2iA license dongle is located. This is done in the **A2iA License information** dialog.

A2iA License information dialog

1. In the Administration or Production module **About** dialog, click **License info** to open the **License, user and database information** dialog.

2. Click the **A2iA license** button.

3. Under **License server settings**, specify:

    License server - the machine where the A2iA license dongle is located. If this setting is left blank, the server is assumed to be the local machine.

    Timeout - the timeout period, in milliseconds. If this setting is left blank, or set to "0", the default value of 30 seconds is used. Normally, you do not need to change this setting.

4. Click **Save** to save and validate any changes. A green check mark indicates that a valid license is present on the specified license server. If there is no valid license on the server, an error icon and a message are displayed.

5. The second group of settings displays the current values of all the A2iA license counters. For details on these counters, please refer to the A2ia documentation. Warning icons appear when there are fewer than 14 days or 10% of the documents remaining. Error icons will appear if the counters reach 0.

   The grayed-out controls are A2iA counters that are not used by DOCUMENTS.

6. Click **Close** to exit the dialog.

Configuring your ABBYY FineReader license

Version 10 of the ABBYY FineReader interpretation engine is automatically installed with DOCUMENTS 7.2 and later. However, in order to *use* this engine, you must start the service and activate the license. Normally this is only necessary for a solution that processes Hebrew invoices. (And in the case of Hebrew, ABBYY version 10 or later is required.)

Starting the ABBYY Licensing Service

1. Select **Start** menu > **Control Panel** > **Administrative Tools** > **Services**.

2. In the list of services that is displayed, right-click **ABBYY SDK 10 Licensing** and select **Start**.
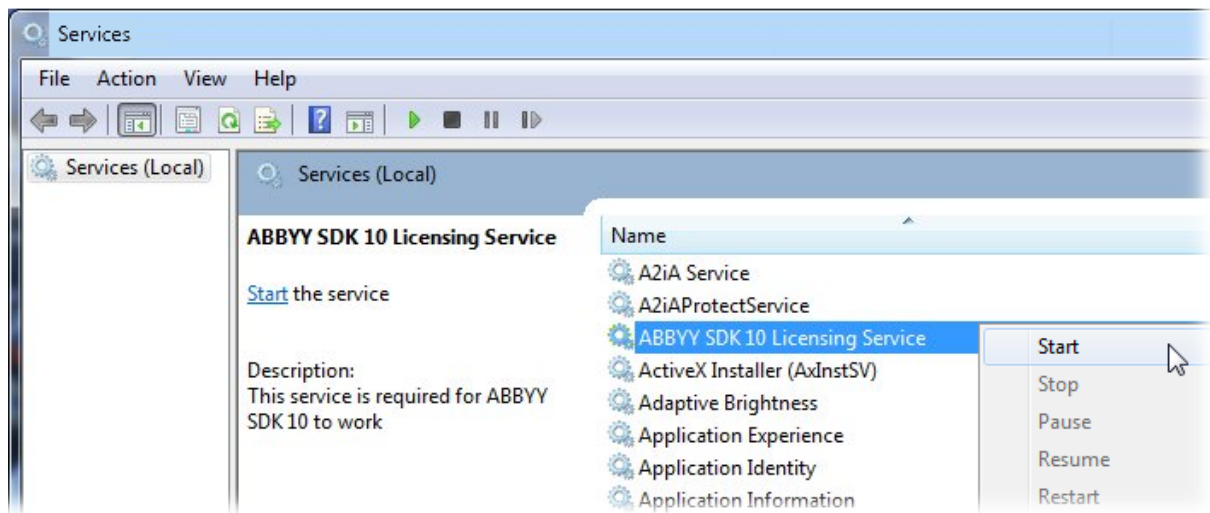
Installing Virtual Rescan (optional)

Virtual ReScan (VRS) is an image enhancement tool. VRS 4.2 can be used with DOCUMENTS to improve the image quality of scanned documents. You can use VRS with its default settings, allow it to automatically enhance images, or use it to make manual enhancements.

Limitations:

- There is no color or grayscale scanning with VRS. You always get black-and-white images.

- You do not have to be an Administrator or have Administrator privileges in order to run VRS 4.2 under standard default Windows user permissions. However, you must have Administrator privileges in order to *install* VRS 4.2. Administration privileges are required for installing scanner components, as well.

You can perform the below steps at any time before or after DOCUMENTS installation.

Installing VRS

1. Install the VRS software that was shipped with your scanner, referring to the installation guide that was supplied with it. Be sure to select "your" scanner during installation.

2. If used, install a SCSI card on the PC:

   - For a "production scanner" (Kofax terminology), an Adrenaline card (as opposed to any other type of SCSI card) is required.

   - For a "professional scanner," you can choose between Adaptec (ISIS) and Adrenaline.

   If you install an Adrenaline card, follow the instructions in the VRS manual.

For more information about VRS installation, please see *VRS Installation Guide* and *VRS Release Notes* from Kofax.

Updating the VRS installation

If the scanner is very new, it may be necessary to install updated ISIS drivers for the scanner to get the correct version. It may also be necessary to download a Component Installer that upgrades the Kofax VRS runtime for newer scanners. Check these sites for more information:

- Download site for version 4.2
  (http://www.kofax.com/support/IP/VRS/4.2/4.2_downloads.asp)

- Kofax Scanner Configurator (http://scadmin.kofax.com/KCSearch/Search.aspx).

To easily find out if a component installation is necessary:

1. In the Scanner Configurator, select **All Configurations**.

2. Select the **Manufacturer**—for example Canon.

3. Select the **Scanner**—for example DR-4010c. In the results you see that this scanner is certified for use with VRS 4.2 using either USB or an Adrenaline 650(i) interface.

Activating the VRS license

In most cases, the VRS license is activated during installation. However, if you see warning messages that it has not been activated, use the below procedure.

ⓘ **Note:** You need the license information that came with the installation.

1. Select **Start** menu > **All Programs** > **Kofax VRS** > **Activate VRS**.

2. Type in the information that came with your license.

3. Click **Activate**.

Creating a VRS scanning specification and adjusting VRS settings

Please refer to *DOCUMENTS Help* topic "Using VRS with DOCUMENTS."

Further steps in setting up the system

The *DOCUMENTS Help* topic "Setting up the system after installation" describes the necessary steps.

Tip: To view online help at any time while using DOCUMENTS, press **F1**.

Troubleshooting

Reinstalling DOCUMENTS

If you need to reinstall the same version of the program, there is no need to uninstall it, delete databases, etc. Simply run the installation program again.

Troubleshooting the license server

If you have trouble with your license server, or with workstation connections to the license server, please refer to *DOCUMENTS 7 Licensing Procedures*, a ReadSoft document available in the `Documentation` folder on the installation CD and in each installation.

That document also describes how to renew or cancel a license, as well as information about trial licenses.

Where to find more information

To access the Readme file, select **Start** menu > **All Programs** > **ReadSoft** > **DOCUMENTS** > **Documentation** > **Readme**, or look in the `DOCUMENTS` folder on a workstation.

The help files (CHM files) and other documents (PDF files) are available in each DOCUMENTS installation. Select **Start** menu > **All Programs** > **ReadSoft** > **DOCUMENTS** > **Documentation**, or look in the `Documentation` folder on a workstation.

DOCUMENTS Help contains a topic called "Additional documentation." That topic contains links to most available documents.

A few specialized documents are available only on the installation CD.