

Remote Scan Importer for INVOICES

User Guide

Version: 5.9

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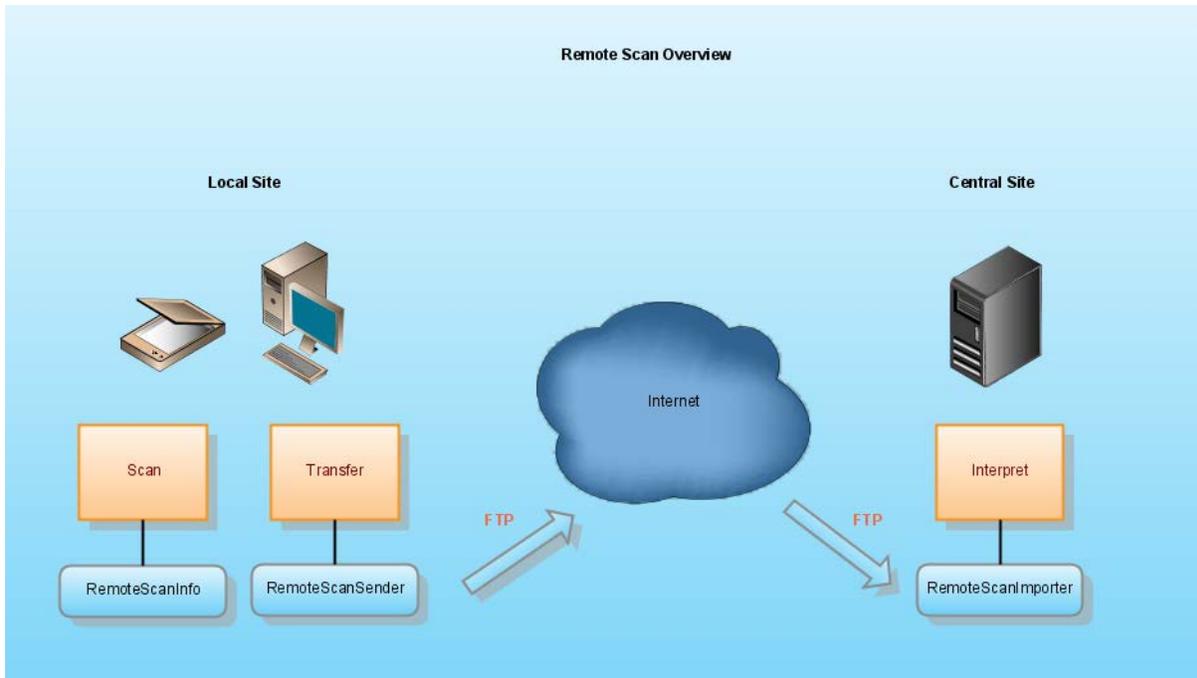
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What is Remote Scan Importer, and what does it do?

Overview

Remote Scan Importer is an optional component package that can be used with INVOICES. It is used to manage scanning of invoices on a local site and sending the invoices to a central site where the invoices are processed.



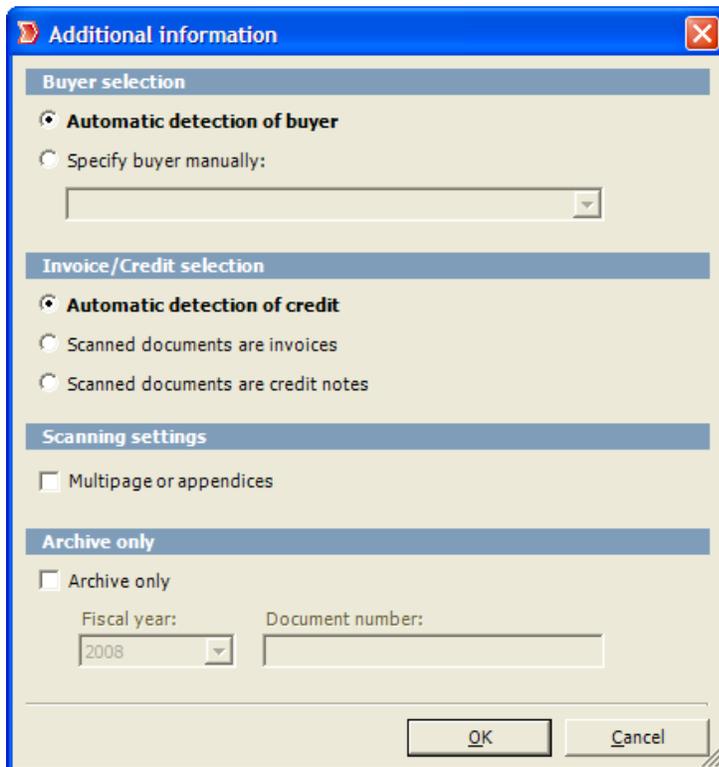
INVOICES must be installed on both the local and the central site. An ABBYY license is only required on the central site, but the ReadSoft license manager (FlexLM) must be installed and running on both the local and central site.

The process:

1. At the local site, the first step is to scan the invoices. The ScanInfo component adds additional information to the invoice.
2. The next step is to run the Transfer module, which uses the RemoteScanSender component to transfer the invoice image, plus additional information that is kept in an XML file, by FTP to the central site. (Optionally, SFTP or a regular network share can be used as transport method instead of FTP)
3. The last step in the process is the Interpret module, which imports the invoices using the RemoteScanImporter component, which reads both the invoice image and the XML file.

The Scan user interface

After the Remote Scan component package has been installed and configured, an additional dialog is displayed to the Scan operator when a Scan job is started at the local site. In this **Additional information** dialog, the Scan operator can specify certain additional information, which is then transferred from the local site to the central site for further use during invoice processing.



The options that this dialog includes are configured using the ScanInfo configuration tool. See "INVOICES_ScanInfo_User_Guide_5.9.x.pdf" for more information.

Requirements

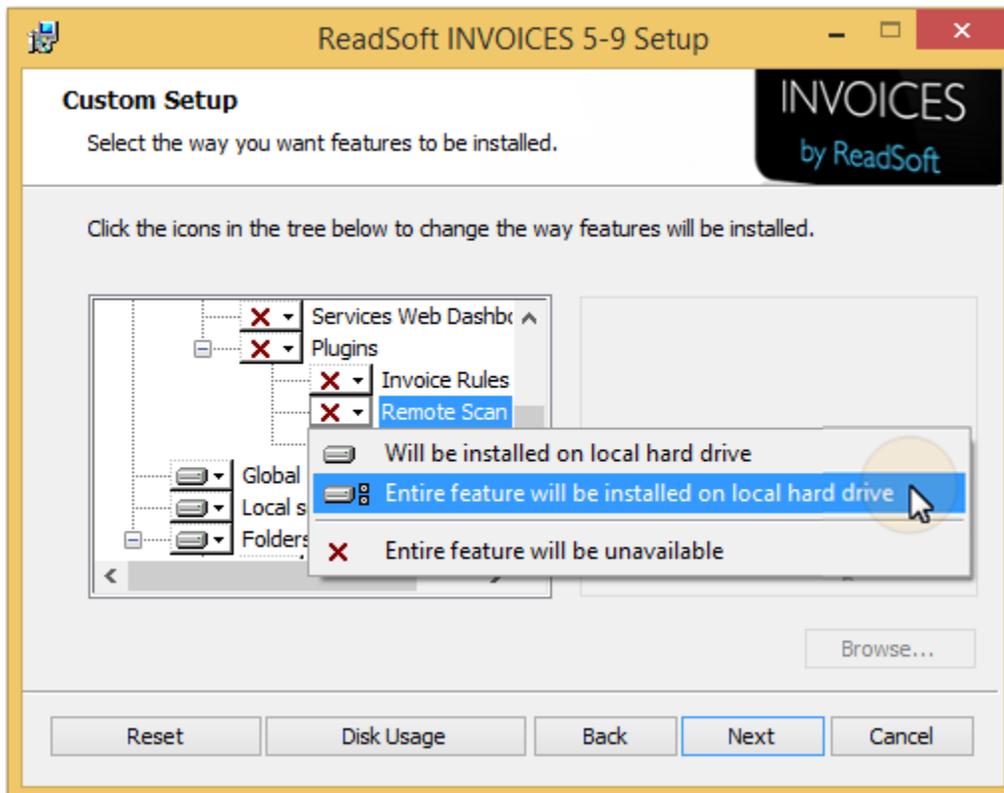
- INVOICES 5.9
- Microsoft .NET Framework 4.0 – you can [download this from Microsoft's website](#).
- 🚫 **Remote scan cannot be delivered to a customer without a corresponding INVOICES license that covers the total volume of documents.**

Install Remote Scan Importer

The Remote Scan Importer plugin is installed while installing INVOICES, but it is not installed by default, so it must be selected.

Note: if a previous version of this plugin is already installed on the computer prior to installing INVOICES 5.9, it should be uninstalled using the uninstall programs feature in the **Control Panel** before INVOICES 5.9 is installed.

1. In the **Custom Setup** dialog, navigate to and click the arrow next to **Remote Scan Importer**, and then click **Entire feature will be installed on local hard drive**.



2. Click **Next** to continue with the rest of the INVOICES installation.

Manually enable Remote Scan Importer after INVOICES is installed

If Remote Scan Importer was not selected during the INVOICES installation, you can enable it afterwards by adding the **colored** information in the following example sections to the `eiLocal.ini` file for the installation.

```
.*****
,
,*   Manager   *
,*****

[Plugins::eimngr]
Plugin1=Common
Plugin2=DBMaintenance
Plugin3=ERPImport
Plugin4=InvoiceSelection
Plugin5=AutoValue
Plugin6=RemoteScanImporter
.....

[eimngr::RemoteScanImporter]
Name=ReadSoft.RemoteScanImporter
Type=COM
SupportDispatch=TRUE
Classname=ReadSoft.RemoteScanImporter.Connect

.*****
,
,*   Interpret *
,*****

[Plugins::eiitrp]
Plugin1=Common
Plugin2=JobScheduler
Plugin3=AutoValue
Plugin4=RemoteScanImporter
.....

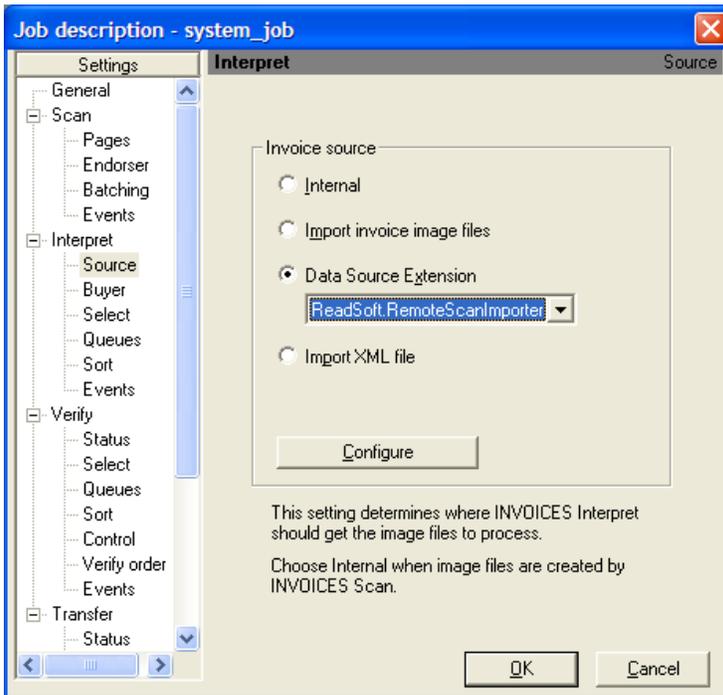
[eiitrp::RemoteScanImporter]
Name=ReadSoft.RemoteScanImporter
Type=COM
SupportDispatch=TRUE
Classname=ReadSoft.RemoteScanImporter.Connect
```

Configure Remote Scan Importer

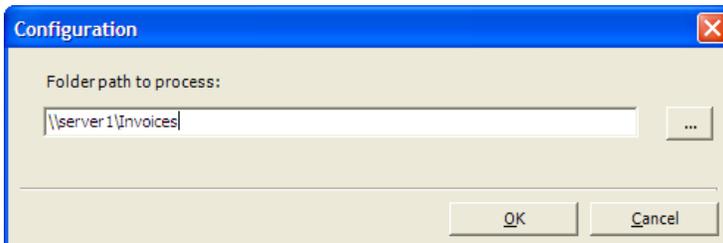
Job description configuration

Configure the Remote Scan Importer via the INVOICES Interpret job description.

3. Open the job description using the Manager or the Interpret module.
4. In the **Source** settings, select **Data Source Extension**.
5. In the dropdown list, select **ReadSoft.RemoteScanImporter**.



6. Click **Configure** and specify where the invoice images and XML files are to be transferred to:



When the job is started, the Remote Scan Importer component reads the invoice images and invoice XML files located in the specified folder.

General import configuration

The Remote Scan Importer does not have a configuration UI for the general configuration. This information is placed in an xml-file named `RemoteScanImporterConfiguration.xml`, which is placed in the Invoices global directory (same folder as `iglobal.ini`) on the central site.

Normally, this configuration does not need to be changed.

The following elements exist:

```
<?xml version="1.0"?>
<RemoteScanImporterConfiguration xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <CommandFileReadExt>.READ</CommandFileReadExt>
  <CommandFileExt>.XML</CommandFileExt>
  <CommandFileSearchPattern>*.XML</CommandFileSearchPattern>
  <ImageFileExt>.TIF</ImageFileExt>
  <ImportSortByDate>>true</ImportSortByDate>
  <DeleteReadXmlFiles>>false</DeleteReadXmlFiles>
  <DeleteReadImageFiles>>false</DeleteReadImageFiles >
  <ConvertToDateTimeFileName>>false</ConvertToDateTimeFileName>
  <DateTimeFileNameFormat>yyMMddHHmmssff</DateTimeFileNameFormat>
  <LogFilePath>c:\remotescanimport_log.txt</LogFilePath>
  <LogLevel>LogError</LogLevel>
  <UseProfileFieldTypeNames>>false</UseProfileFieldTypeNames>

  <UseRemoteScanFileLockDatabaseTable>>false</UseRemoteScanFileLockDatabaseTable
  >
  <NumberOfMinutesBeforeRemovingTableFileLocks>60
  </NumberOfMinutesBeforeRemovingTableFileLocks>
</RemoteScanImporterConfiguration>
```

Element	Value type	Example	Description
<code>CommandFileReadExt</code>	Extension	.READ	Command file will be renamed to this extension after being processed, in order to mark the file as used.
<code>CommandFileExt</code>	Extension	.XML	File extension of the command file.
<code>CommandFileSearchPattern</code>	File pattern	*.XML	File pattern to use when searching for command files.
<code>ImageFileExt</code>	Extension	.TIF	File extension of the image file.
<code>ImportSortByDate</code>	true/false	true	If set to <i>true</i> , the files will be processed in datetime order.

<code>DeleteReadXmlFiles</code>	true/false	false	If set to <i>true</i> , the command file will be deleted after being processed.
<code>DeleteReadImageFiles</code>	true/false	false	If set to <i>true</i> , the original image file will be deleted after being processed. Note: If <code>DeleteReadXmlFiles</code> is set to <i>false</i> , <code>DeleteReadImageFiles</code> is also treated as though it is set to <i>false</i> .
<code>ConvertToDateTimeFileName</code>	true/false	false	If set to <i>true</i> , the command file and image file will be renamed to a datetime filename (instead of the GUID names created by RemoteScan Sender).
<code>DateTimeFileNameFormat</code>	Date time format	yyMMddHHmmssff	Format to use when renaming files as described above. Note that a suffix counter (1,2,...) will be added to the filename if for some reason the filename already exist.
<code>LogFilePath</code>	File path	C:\log.txt	Log file path.
<code>LogLevel</code>	LogError LogDebug	LogError	Amount of logging to be written. LogDebug = Verbose logging for error tracking. LogError = Only errors logged, recommended setting for production usage.
<code>UseProfileFieldTypeNames</code>	True/false	false	If set to <i>true</i> , the component will query the profile for fieldtypenames instead of the invoice (via the definition). This can be done in order to workaround a limitation in Invoices: When editing a profilefield's fieldtypename, the new value is not copied to the existing definitions.
<code>UseRemoteScanFileLockDatabaseTable</code>	True/false	false	If set to <i>true</i> , file lock is handled in a database table. It is recommended when many Interpret instances are importing invoices from the same shared directory. The database table "remotescanfilelock" must exist in the INVOICES database.
<code>NumberOfMinutesBeforeRemovingTableFileLocks</code>	Number	60	Specifies after how long time a file lock is removed from the database. This setting is only used when the setting "UseRemoteScanFileLockDatabaseTable" is set to true.

Support

If you have problems or questions, contact your local distributor first. Each installation is unique, and your Lexmark distributor has knowledge about your particular installation and how you use it.