# Kofax ReadSoft Invoices
## Installing Kofax VRS

Version: 6.2.0

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KOFAX

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# Preface

Kofax Virtual ReScan (VRS), version 5.0 and later can be used with:

- Forms 5-3 Service Pack 4 HF11 and later
- Invoices 5-7 or later.

This document describes how to install and configure VRS version 5.x. The information in this document is based on some basic testing with a couple of different scanners, but it is not thorough. Consequently, Kofax cannot guarantee that all VRS scanners will work completely correctly with Forms and Invoices.

However, when your scanner is certified for use with VRS, VRS is recommended, especially with Invoices, because of the superior image quality and useful functions such as auto deskew and auto crop.

To verify the correct scanner for your ReadSoft Invoices and ReadSoft Forms version, contact your Kofax representative.

Chapter 1

# Limitations

With some scanners, Invoices and Forms cannot control the scanner buffer when VRS OutOfPaper is enabled. See “Configuring VRS” on page 10 for details.

Current versions of Invoices and Forms do not support color or grayscale scanning with VRS. This is requested for future versions.

Invoices does not support blank page deletion, which is one of the extra features available with VRS Plus (see next section).

You do not have to be an Administrator or have Administrator privileges in order to run VRS 5.x under standard default Windows user permissions. However, you *must* have Administrator privileges in order to *install* VRS 5.x. Administration privileges are required for installing scanner components, as well.

Chapter 2

# Installing VRS

1. Install Forms or Invoices before installing VRS.
   During installation of Forms or Invoices, select SCSI when prompted to choose between Kofax and SCSI. If you miss this, then adjust the program's initialization file as described in "Adjusting the INI file" in the next section.
2. 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.

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

Chapter 3

# Configuring Invoices or Forms

## Adjusting the INI files

This step is required if you did not select Kofax when prompted to choose between Kofax and SCSI during the installation of Forms or Invoices.

The settings for each workstation are saved in `Eilocal.ini` (Invoices) or `Ehlocal.ini` (Forms), located in: `\Users\Public\ReadSoft\Forms or Invoices` on newer operating systems (Vista, Windows 7, Windows 8, and Windows Server 2012)

Some settings are also saved in `eiglobal.ini` (Invoices) and `ehglobal.ini` (Forms).

Make these changes in those files:

1. In `eiglobal.ini` or `ehglobal.ini`, find the [ScannerDefs] section and add an entry to the list for VRS printers in the following way:

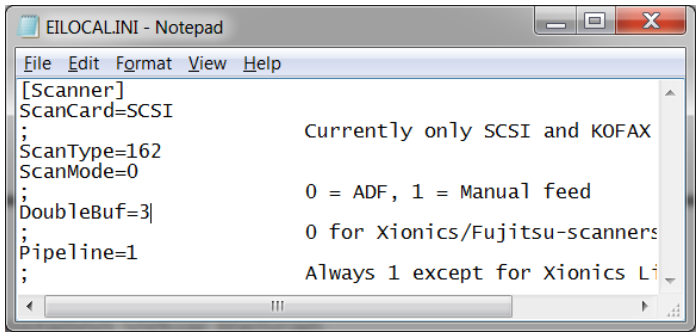
   ```
   "Scanner162=162, VRS, 14592, -1, 5, 0, 1, 100, 0, 40, 60, 2, 0, PIXKOFAX, 1"
   ```

   Note that the number specified in the example above (162) is simply an example if you have a standard `eiglobal.ini` (Invoices) or `ehglobal.ini` (Forms) file that has 161 scannerdefs already listed by default. If you have an older version of the file, or it has been modified in your system, simply add VRS in the above way at the end of the list of scannerdefs using the next number in sequence.

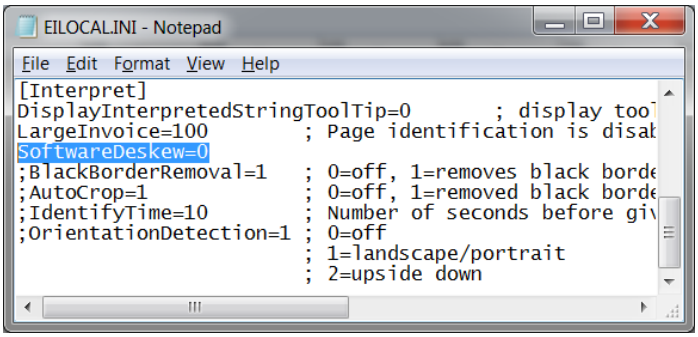
   Alternatively, you can remove all of the other scannerdefs from the list and add one for VRS in the following way:

   ```
   "Scanner1=1, VRS, 14592, -1, 5, 0, 1, 100, 0, 40, 60, 2, 0, PIXKOFAX, 1"
   ```

2. In the `eilocal.ini/ehlocal.ini` files, find the [Scanner] section and change the ScanCard setting to SCSI and the Scantype to the number that was specified for the VRS scannerdef in the previous step (for example, "ScanType=162").

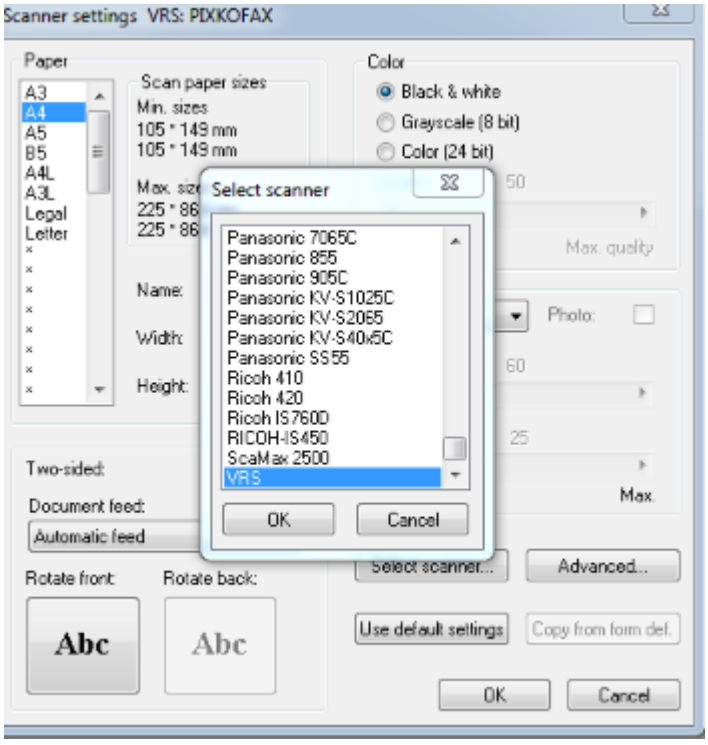


3. For Invoices: Find the [Interpret] section and change SoftwareDeskew to 0. (This is necessary when you use VRS Deskew and Image Crop, which are selected by default.)




4. Save and close the file.

## Adjusting the scanner settings

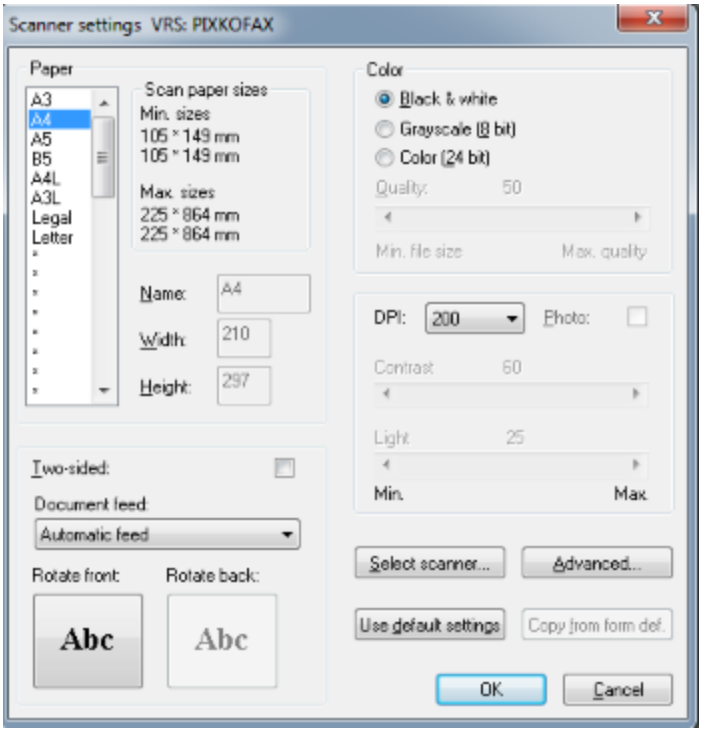



1. Using the Manager module, open Forms' or Invoices' **Scanner settings** dialog.
2. Click **Select scanner**.
3. Select "VRS" in the **Select scanner** dialog.
4. Click **OK** to close the dialog.
5. In the **Scanner settings** dialog:
   Set the paper size to A3 (or Max). VRS's cropping function ensures the correct paper size.
   - For Kofax Invoices, set the DPI to 300 in most cases

- For ReadSoft Forms, set the DPI to 200

Color and grayscale scanning are supported.

The **Contrast** and **Light** settings do not have any effect. They are controlled by VRS.




The **Advanced** settings do not have any effect and duplex is not supported.

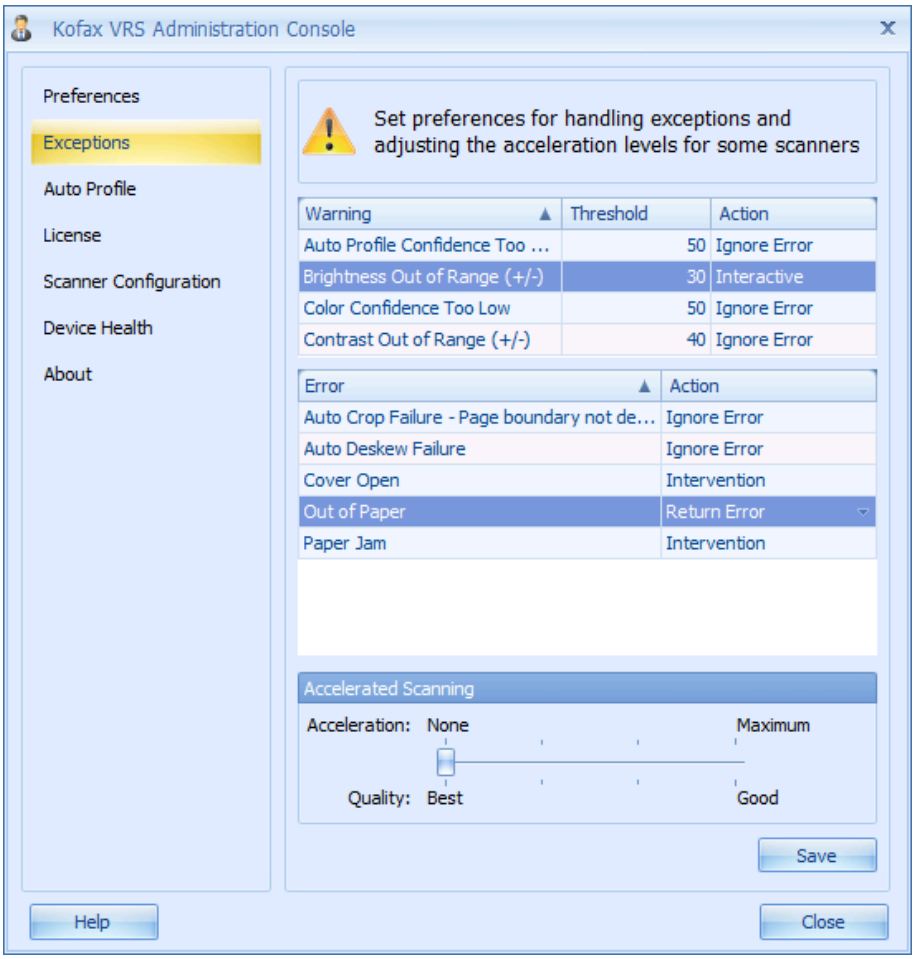
6. Click **OK** to close the **Scanner settings** dialog.

Chapter 4

# Configuring VRS

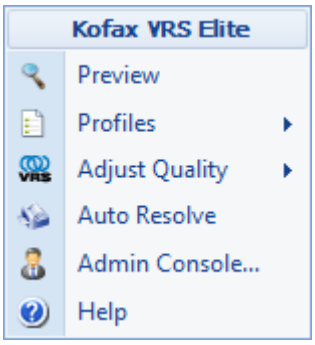
This section describes recommended adjustments to some of the basic VRS settings. (For more detailed information please see VRS Help or the VRS user manual.)

1. Using the Manager module, open Forms' or Invoices' **Scanner settings** dialog—or start the Scan module.
2. Right-click the VRS icon that is displayed in the Windows notification area (system tray), and select **Admin Console**. This opens the **Kofax VRS Administration Console** dialog.
3. Click the **Exceptions** page and set **Out of Paper** to **Return Error**.

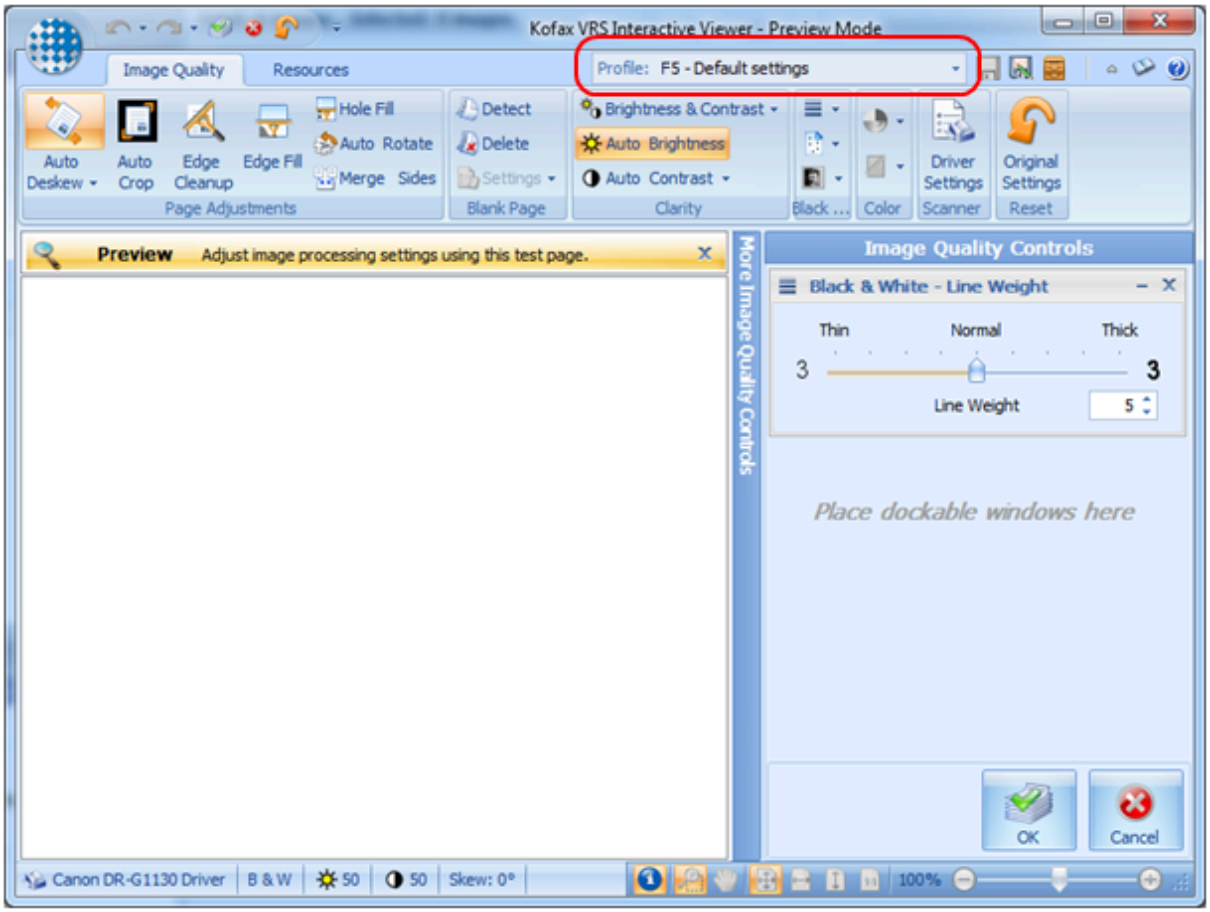



4. Click **Save**. The dialog closes.

5. Right-click the VRS icon again, and ensure that **Auto Resolve** is not selected. (It is selected by default during installation.)




6. Right-click the VRS icon again, and select **Preview**. The **Kofax VRS Interactive Viewer** dialog opens.
7. Ensure that **Default settings** are selected as the profile in the dropdown box at the top of the dialog.



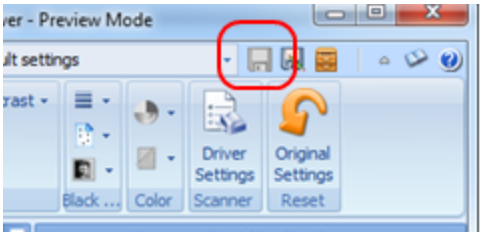

8. Adjust the settings for the best results.

   Recommended skew settings: In the toolbar, select **Deskew**, **Auto Crop**, **Edge Cleanup** and **Auto Rotate**.

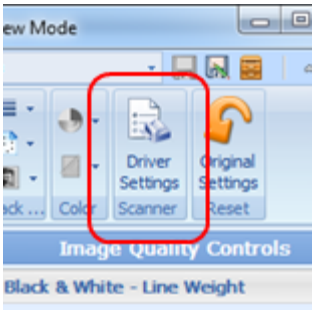
**Warning:** In the **Clarity** section of the toolbar, do not deselect **Auto Brightness**. It must be selected for the default profile.

Invoices crops images to fit the paper size indicated in the scanner settings in Manager. If the original image is rotated by Kofax, this may cause undesired results.
It is recommended that the parameter, AllowOtherPageSizeFromScanner=1, is specified in the [Scanner] section of `eilocal.ini`.

9. Click the **Save** button at the top and to the right in the toolbar to save the new settings to the default profile.




10. Optional: Click Driver settings in the toolbar to activate special features such as **Color Dropout**, **Double Feed Detection**, and so on.



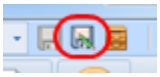

What is available will depend on the scanner. Note that not all of this functionality has been tested by Kofax.

11. Recommended if images are darker than desired: On the **Clarity** section of the toolbar, lower the **Contrast** setting by about 5-15.
12. Click the **Save** button to save the settings.

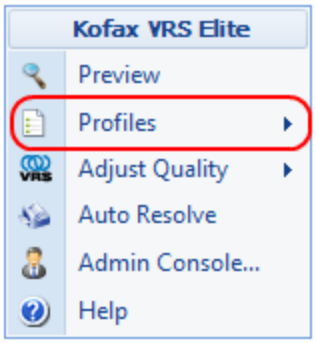
## Optional: Creating your own profiles

This can be useful if you are having difficulty scanning a certain type of document with good results using the default profile. You can create a separate profile that is customized for that type of document. Use the same basic procedure as above, except:

1. Deselect **Auto Brightness in the Clarity section of the toolbar**.
2. Adjust the settings until you get the scan quality you wanted. For example, change the **Light** and **Contrast** settings, or add **Noise Removal**.

3. Click the **Save As** button in the toolbar  and specify a suitable name – one that tells you for what kind of document you created the profile form. Example: Name the profile “Blue” if it is for blue documents.
4. Click **OK** to close the **Kofax VRS Interactive Viewer** dialog.

   When you run Forms, you can now select the correct profile when a job is started: Right-click the VRS icon in the Windows notification area (system tray) and select **Profiles**.



Chapter 5

# Troubleshooting

| Problem | Possible solutions |
|---|---|
| The scanner cannot be controlled from the PC. | Start the PC before turning on the scanner. |
| Installation did not succeed. | Ensure that you completed all the steps described in this document.<br>Checking whether the scanner works with Kofax VRS Test Console can provide you with a clue to the problem. |
| Endorser problems. | Depending on the scanner, endorser functionality may be limited. For details, please see the scanner information at one of the sources mentioned on page 4. |
| No color or grayscale scanning. | At the time of this writing, VRS does not support color or grayscale scanning. A request has been submitted. |
| Adjusting VRS settings while both the Manager's Scanner settings dialog and the Scan module are open causes the modules to crash. | Ensure that *only* the Manager or *only* Scan is running when you access VRS settings. |
| The last page scanned is not put in a queue. (This error can occur only when you use VRS with Invoices and INTEGRATION.) | VRS's Out of Paper error must be set to Return Error-see page 10. |
| The InvoiceScanned event is not fired for the last page scanned. (This error can occur only when you use VRS with Invoices and a plug-in that uses the InvoiceScanned event.) | |