

FORMS and INVOICES

Installing Virtual ReScan

Version: 4.0.x and later

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Introduction

Kofax Virtual ReScan (VRS), version 4.0 and later can be used with:

- FORMS 5-2 Service Pack 7 and later
- INVOICES 5-2 Service Pack 7 and later

This document describes how to install and configure VRS version 4.x. The information in this document is based on some basic testing with a couple of different scanners, but is not thorough, therefore a guarantee that all VRS scanners will work completely correctly with FORMS and INVOICES is not possible.

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 INVOICES and FORMS version, contact your Lexmark representative.

Limitations

With some scanners, INVOICES and FORMS cannot control the scanner buffer when VRS OutOfPaper is enabled.

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 4.x under standard default Windows user permissions. However, you *must* have Administrator privileges in order to *install* VRS 4.x. Administration privileges are required for installing scanner components, as well.

VRS Basic or VRS Professional?

There are two versions of VRS 4.x:

- “Standard” has the same functionality as the previous version (3.5).
- “Plus” features are also available. These include:
 - Content-based rotation.
 - Blank page deletion. (**Note:** Blank page deletion is not supported by INVOICES.)
 - White background cropping and deskew.
 - Some new functionality for color scanning. However, INVOICES and FORMS do not support color or grayscale scanning with VRS.

Recommendation

Use VRS 4.x Standard for desktop scanners, such as Fujitsu fi-4120C, Canon DR-2080C, Panasonic KV-S2026, etc.

Use VRS 4.x Plus for workgroup and production scanners, such as Fujitsu fi-4530C, 5650C, 4340C, 5750C, Canon DR-3060, 3080C, 6080, 9080C, etc.

Installing FORMS

Install FORMS 5-2 SP7, or INVOICES 5-2 SP7 or later, before installing VRS.

During installation of FORMS, or during installation of INVOICES version 5-3 and above, *select Kofax* 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" below.

Installing VRS

Upgrading from previous versions

VRS 3.5

You can install VRS 4.x over an existing version of VRS 3.5. It is not necessary to remove VRS 3.5 before upgrading to VRS 4.x.

Earlier versions

You cannot install VRS 4.x over a version of VRS that is earlier than VRS 3.5. Upgrade to VRS 3.5 before proceeding with the VRS 4.x installation. You can download the VRS 3.5 upgrade from the Kofax website.

Instructions

After installing FORMS or INVOICES, complete these steps in order.

Note that VRS must be reinstalled each time you upgrade FORMS or INVOICES. (However, the SCSI card does not need to be reinstalled.)

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. 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.

Configuring INVOICES or FORMS

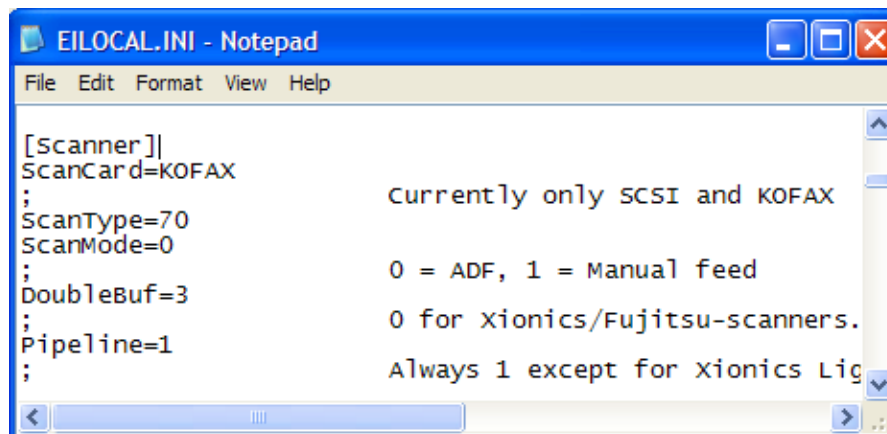
Adjusting the INI file

This step is required...:

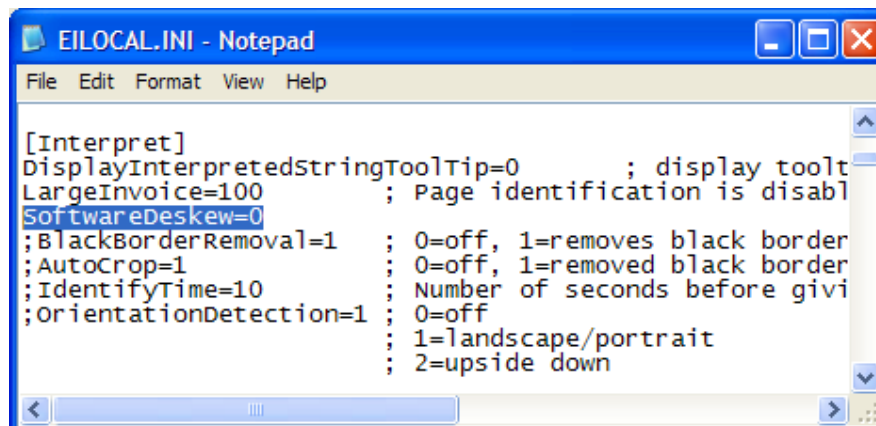
- ...with INVOICES version 5-2.
- ...with FORMS, and with INVOICES 5-3 and above, if you did not select Kofax when prompted to choose between Kofax and SCSI.

The settings for each workstation are saved in `Eilocal.ini` (INVOICES) or `Ehlocal.ini` (FORMS), located in the `Windows` or `Winnt` directory. Open that file and make these changes:

1. Find the `[Scanner]` section and change the `ScanCard` setting to Kofax.



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.)



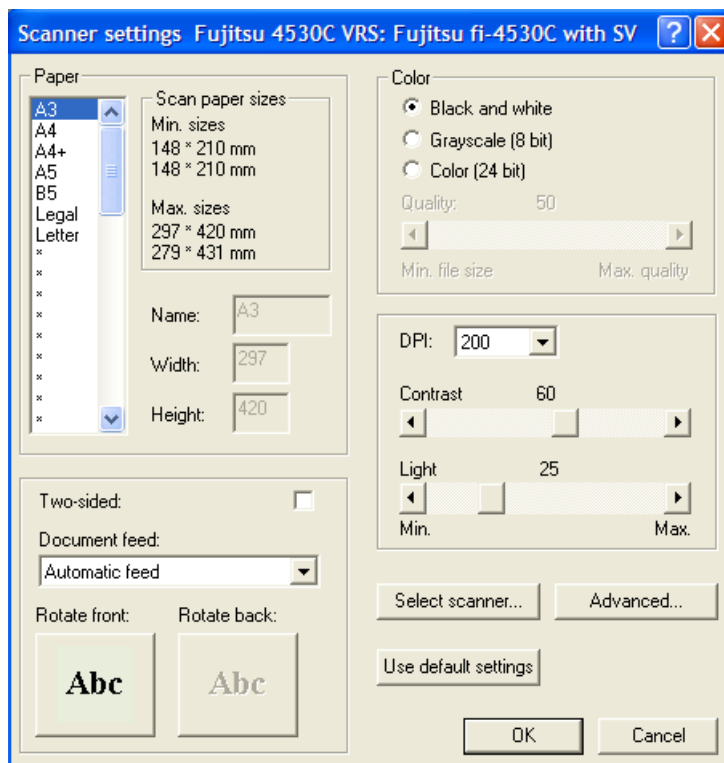
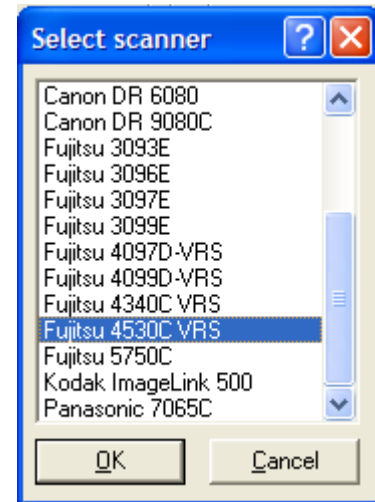
4. Save and close the file.

Adjusting the scanner settings

1. Using the Manager module, open FORMS' or INVOICES' **Scanner settings** dialog.
5. Click **Select scanner**.
6. If your model scanner is available in the dialog that is displayed, select it. If not, we suggest selecting Fujitsu 3099E.

(When you use a VRS scanner, the program communicates with the default scanner selected during VRS installation. Therefore, it does not matter which scanner is selected in the **Select scanner** dialog. Still, the program does require you to choose one.)

7. Click **OK** to close the **Select scanner** dialog.
 8. In the **Scanner settings** dialog:
 - Set the paper size to **A3** (or **Max**). VRS's cropping function ensures the correct paper size.
 - For INVOICES, set the DPI to 300 in most cases.
 - For FORMS, set the DPI to 200.
 - Do not change the **Color** setting. Color and grayscale scanning are not yet supported.
- Note:** The **Contrast** and **Light** settings do not have any effect. They are controlled by VRS.

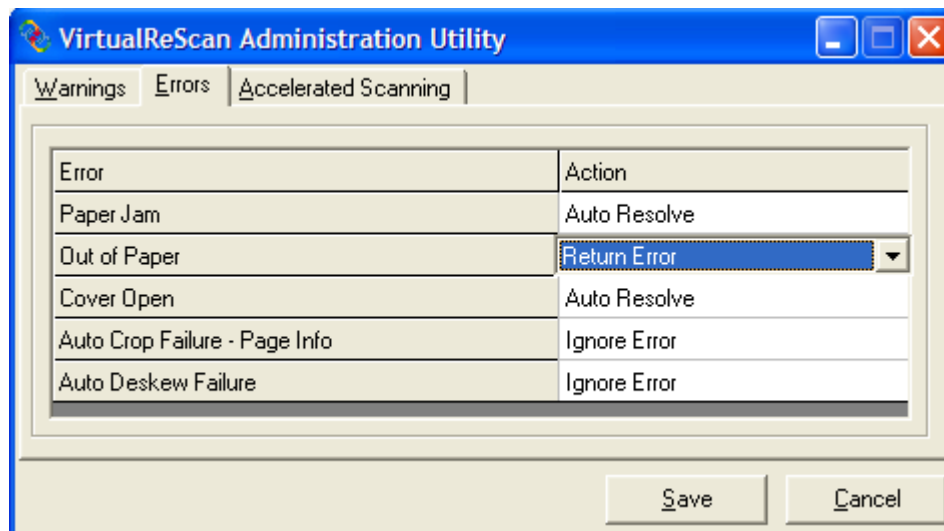


9. Click **OK** to close the **Scanner settings** dialog.

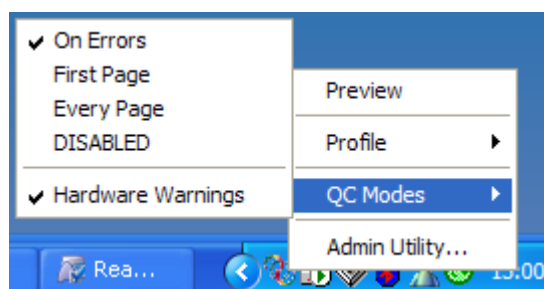
Configuring VRS

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.)

- Using the Manager module, open FORMS' or INVOICES' **Scanner settings** dialog—or start the Scan module.
- Right-click the VRS icon that is displayed in the Windows notification area (system tray), and select **Admin Utility**. This opens the **VirtualReScan Administration Utility** dialog.
- Click the **Errors** tab and set **Out of Paper** to **Return Error**.



- Click **Save**. The dialog closes.
- Right-click the VRS icon again, and ensure that **QC Modes > On Errors** is selected. (It is selected by default during installation.)



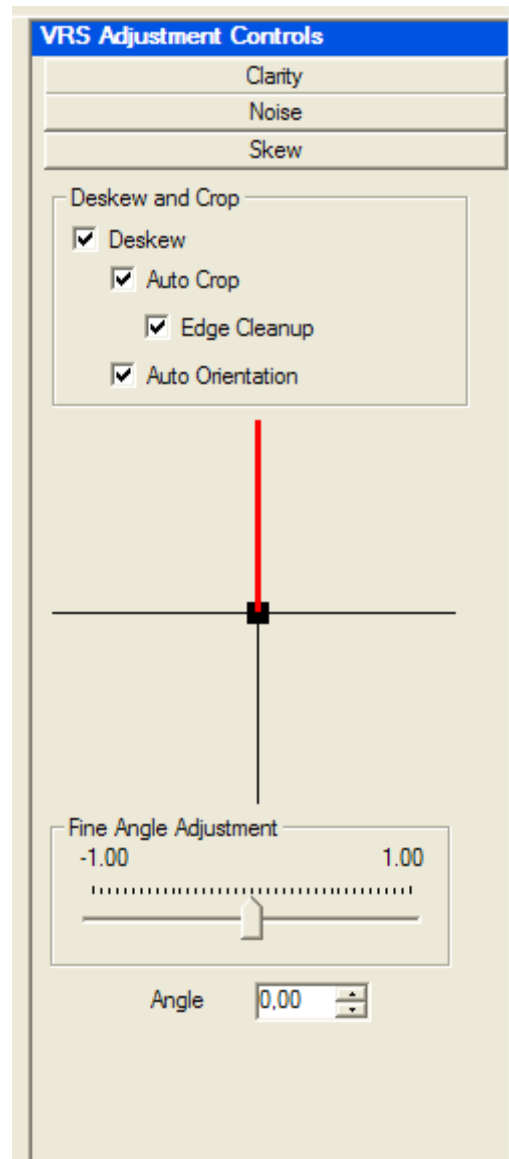
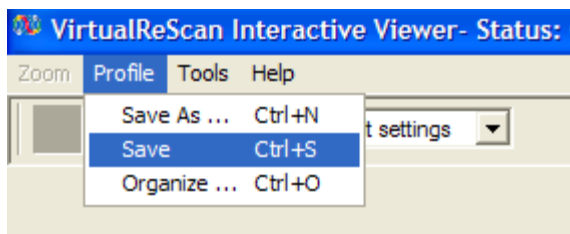
14. Right-click the VRS icon again, and select **QC Modes > Hardware Warnings**. When this option is selected, hardware errors such as paper jam, out of paper, etc. are handled according to the **Actions** set in the Administration Utility (above). If this option is not selected, it is as if **Return Error** were selected as the **Action** for each hardware error.
15. Right-click the VRS icon again, and select **Preview**. The **VirtualReScan Interactive Viewer** dialog opens.
16. Ensure that **Default settings** are selected in the dropdown box.
17. Adjust the settings for the best results.

Recommended skew settings: On the **Skew** tab, select **Deskew**, **Auto Crop**, **Edge Cleanup** and **Auto Orientation**. (Note: **Auto Orientation** is only available in the Plus version of VRS.)

❗ **Warning:** On the **Clarity** tab, do not deselect **Auto Brightness**. It must be selected for the default profile.

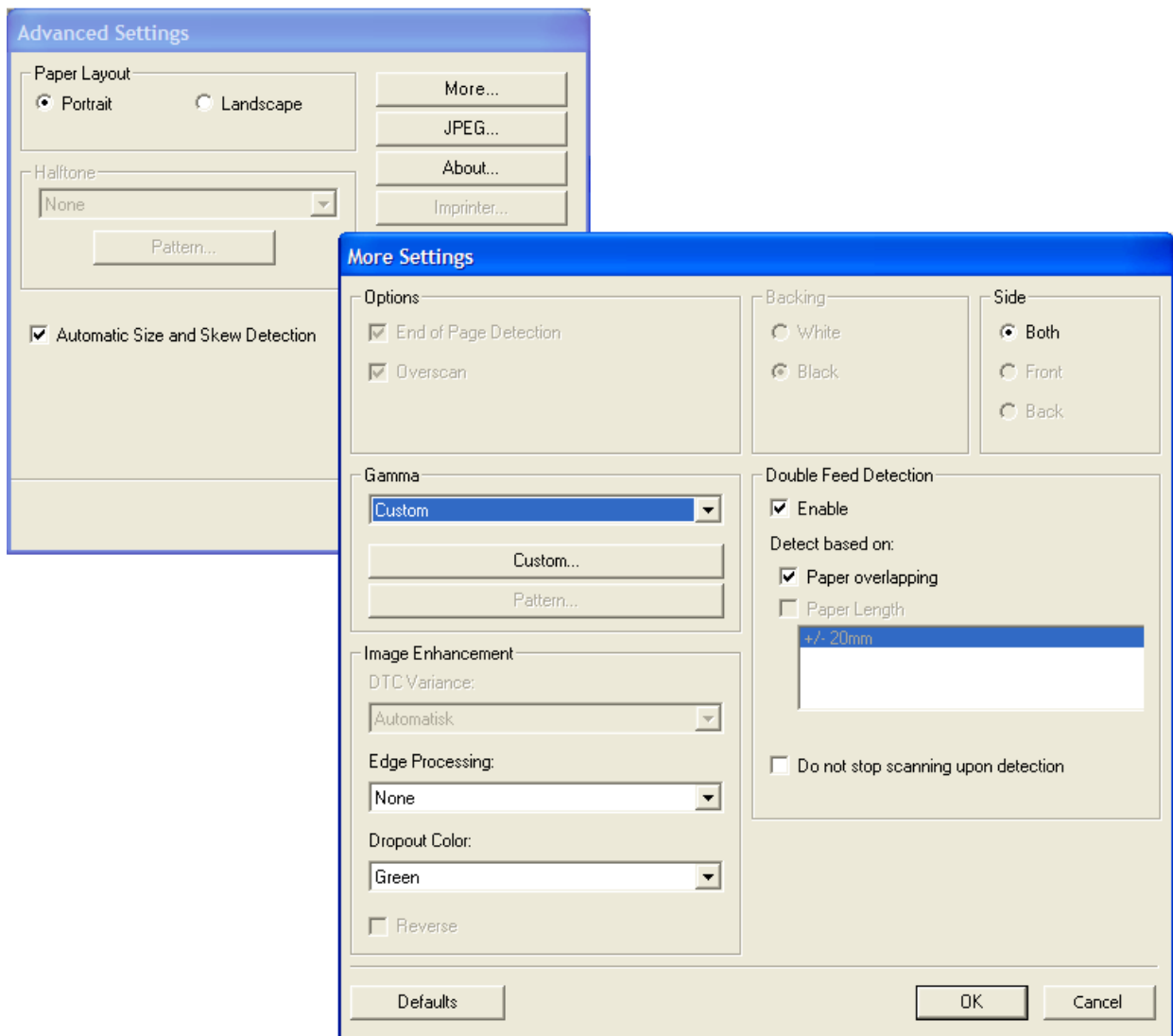
ℹ **Note:** INVOICES crops images to fit the paper size indicated in the scanner settings in Manager. If the original image is rotated by Kofax, this may cause undesired results.

18. Save the new settings to the default profile. (Click **Profile > Save**.)



19. Optional: Activate some **special features**.

- Select **Tools > Scanner driver settings** in the top menu.
- Click **More**.
- In the **More Settings** dialog you can enable **Color Dropout**, **Double Feed Detection**, and so on, depending on the scanner. Note: Not all of this functionality has been tested.



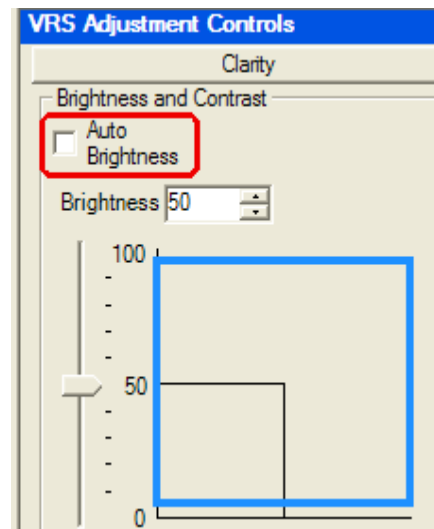
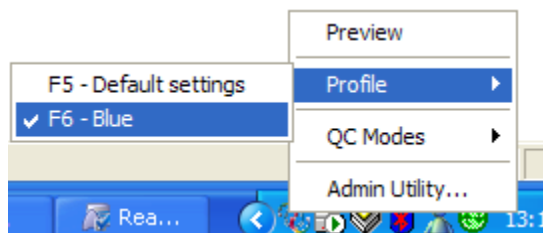
- Click **OK** to close the **More Settings** and **Advanced Settings** dialogs.
20. Recommended if images are darker than desired: On the **Clarity** tab, lower the **Contrast** setting by about 5-15.
21. Resave the settings. (Click **Profile > Save**.)

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**.
22. Adjust the settings until you get the scan quality you wanted. For example, change the **Light** and **Contrast** settings, or add **Noise Removal**.
23. Select **Profile > Save As** 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.
24. Click **OK** to close the **VirtualReScan 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 **Profile**.



Troubleshooting

Problem	Possible solutions
The scanner cannot be controlled from the PC.	Start the PC before turning on the scanner.
Installation did not succeed.	<p>Ensure that you completed all the steps described in this document.</p> <p>Checking whether the scanner works with VCDemo can provide you with a clue to the problem. To start VCDemo, select Start menu > Programs > Kofax VRS > VCDemo.</p>
Endorser problems.	Depending on the scanner, endorser functionality may be limited.
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 <i>only</i> the Manager or <i>only</i> 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.
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.