



# Kofax ReadSoft Collector Installation Guide

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**KOFAX**

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# Preface

This document guides you through the installation of Kofax ReadSoft Collector 6.5.0 in connection with Kofax ReadSoft Invoices 6.1 or later.

**i** 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-vjrini4m/RS\\_Collector.htm](https://docshield.kofax.com/Portal/Products/en_US/RSC/6.5.0-vjrini4m/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.

 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 is available at the following location:

[https://docshield.kofax.com/Portal/Products/en\\_US/RSC/6.5.0-vjriniri4m/RS\\_Collector.htm](https://docshield.kofax.com/Portal/Products/en_US/RSC/6.5.0-vjriniri4m/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.

 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 can be installed and used with Kofax ReadSoft Invoices 6.1 or higher.

## 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.

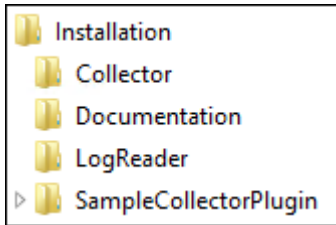
- To use the ReadSoft Collector software together with ReadSoft Invoices to collect invoices by email (attached image formats only), install ReadSoft Collector on every computer where ReadSoft Invoices Manager and Interpret modules are installed.
- To use ReadSoft Collector with ReadSoft Invoices to 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 installation files

To download the Kofax ReadSoft Collector 6.5.0 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.

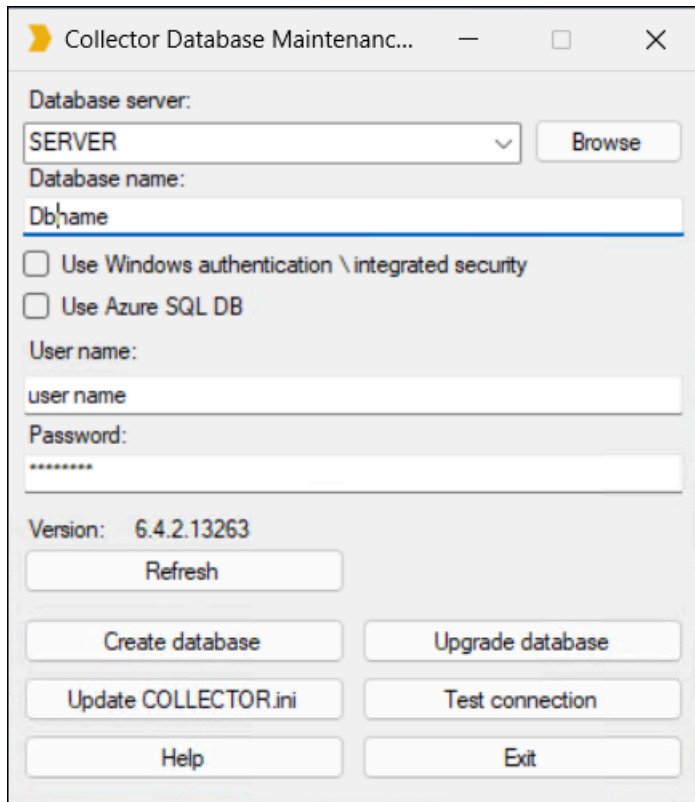


- No settings are lost. Just remember the ReadSoft Collector database name so that you can use it again when the program is upgraded.
- Make sure to start the database maintenance tool to check if you need to upgrade the database after ReadSoft Collector has been upgraded.
- When the **Completed** dialog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





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.
  - Select **Use Azure SQL DB** if you want to use Azure database to create the ReadSoft Collector 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**.

**i** 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, 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**.

**i** 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

You can add input sources to import emails using protocols, such as IMAP, MAPI, and EWS. You can use input sources while creating a job description. See [Add input source configuration](#) topic in *Kofax ReadSoft Collector Help* for more information.

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

Configure the following settings in ReadSoft Collector for ReadSoft Invoices 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
- Plugins options
- Advanced
- SMTP Settings
- Block Senders

Refer ReadSoft Collector [General settings dialog box](#) topic in *Kofax ReadSoft Collector Help* for more information about these settings.

## Configure ReadSoft Invoices job for ReadSoft Collector

For more information about ReadSoft Collector Job configuration, see [Job configuration dialog box](#) topic in Kofax ReadSoft Collector Help.

## 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

- XMLextractimageReferenceImages
- 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.

 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 file folder as input source for XML files](#) topic in *Kofax ReadSoft Collector Help*.
  - 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.

 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 on all ReadSoft Invoices client machines. For more information, see [Install Collector with Invoices](#).
5. Create database for Kofax ReadSoft Collector 6.5.0 (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\_FilesToItrp. For more information, see [Add input sources](#) and [Configure file folder as an input source for XML invoices](#).

7. Configure General settings in ReadSoft Collector. For more information, refer to [Configure EWS as input source topic](#) in *Kofax ReadSoft Collector Help*.
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\_FilesToItrp 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.

 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\_FilesToItrp folder or by processing the emails that have XML attachments.