



Kofax ReadSoft Collector Release Notes

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KOFAX

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Chapter 1

About this release

The release notes include key details about Kofax ReadSoft Collector 6.5.0. Please read this document carefully, as it contains late-breaking information that may not be available in other ReadSoft Collector documentation.

The full ReadSoft Collector documentation set is available online:

https://docshield.kofax.com/Portal/Products/en_US/RSC/6.5.0-vjriniri4m/RS_Collector.htm

For details, see [Product documentation](#).

Version information

The build number for Kofax ReadSoft Collector 6.5.0 is 18065.

Quick links

Use these links to quickly locate details about:

- [Product documentation](#)
- [System requirements](#)
- [What's new](#)
- [Main business functionality](#)
- [Installation](#)
- [Changes in behavior](#)
- [Resolved issues](#)
- [Known issues](#)

Chapter 2

Product documentation

The full documentation set for Kofax ReadSoft Collector is available here:

https://docshield.kofax.com/Portal/Products/en_US/RSC/6.5.0-vjriniri4m/RS_Collector.htm

The ReadSoft Collector documentation set includes the following help systems and guides:

- **ReadSoft Collector Help:** This help assists users with the key tasks such as how to configure and use the product.
- **Database Maintenance Tool Help:** This help assists the system administrator with the tasks of creating and maintaining ReadSoft Collector databases.
- **Installation Guide:** This guide contains information on how to install ReadSoft Collector.
- **Customization Guide:** This guide contains information about how to create and customize plugins for ReadSoft Collector and ReadSoft Invoices.
- **Integration Specifications Guide:** This guide contains information about how ReadSoft Collector's XML logic is handled.
- **SmartXML Guidelines for XML Standards:** This guide contains information about how to work with XML standards in ReadSoft Invoices in connection with ReadSoft Collector.

All documentation is available in English except the Kofax ReadSoft Collector Help which is also available in French, German, and Spanish.

Offline documentation

If the security policy for your organization restricts Internet access and requires you to access offline documentation while working with Kofax ReadSoft Collector, you can download the compressed documentation files from the [Kofax Fulfillment](#) site.

The offline documentation packages are available in the following languages:

- English (EN)
- French (FR)
- German (DE)
- Spanish (ES)

Install offline documentation

Extract the offline documentation package to the correct location on the workstation to be able to get context-sensitive information when you press F1 or a help button in the program.

1. Create a folder, **Documentation**, under the **GlobalPath** folder. By default, the GlobalPath folder is available at the following location on the workstation where ReadSoft Collector is installed:
C:\Users\Public\READSOFT\INVOICES\GlobalPath
2. Download `ReadSoftCollectorDocumentation_6.5.0_<language code>.zip` from the [Kofax Fulfillment](#) site.
3. Extract the contents into the **Documentation** folder.

Chapter 3

System requirements

This installation package contains a full version of the Kofax ReadSoft Collector software and associated documentation. To use the software, no special license activation is required.

The modification of files in this software application in any way other than using ReadSoft Collector's configuration tools may negatively affect the functionality of the program. Such a modification may cause errors and issues that are not covered by your support and maintenance agreement (if any) and may cause reduced or null and void warranties.

The database needs to be upgraded using the Kofax ReadSoft Collector Database Maintenance Tool if the database version changes from one Kofax ReadSoft Collector version to the next.

- For ReadSoft Collector 6.5.0, the database version is 6.4.2.13263.

i Make sure to upgrade the database when upgrading from ReadSoft Collector 6.4 Hotfix 1 or earlier.

If you want to use a ReadSoft Collector database that was created in a version earlier than Kofax ReadSoft Collector 6.4, we recommend that you manually run the CleanUpXFields.sql script either before or after upgrading the database. This script is available in the `\ReadSoft\COLLECTOR\DBScripts\Maintenance` folder where Collector is installed. Running this script removes any orphaned XField fields that may prevent the removal of XML invoice definitions from the system.

Detailed system requirements for this product are available in the *Kofax ReadSoft Collector Installation Guide*.

Chapter 4

What's new

This chapter lists the features and enhancements introduced in Kofax ReadSoft Collector 6.5.0.

- **34576:** The installer is upgraded to WIX.
- **33445:** Microsoft Exchange Server 2016 is supported for use with Kofax ReadSoft Collector.
- **32435:** It is now possible to save images with landscape layout when using SmartXML. This is accomplished using the new `ColumnsLimitForLandscapeLayout` flag in the [General] section in `Collector.ini`. Nine is the default setting, and it means that XML invoices with more than nine columns are displayed in landscape layout.

 Does not work for ZUGFeRD XML invoices.

- You can stop emails with large attachments.
- Logging is enhanced to allow support personnel a better opportunity to identify issues.

Chapter 5

Main business functionality

This chapter summarizes the primary Kofax ReadSoft Collector features.

Process XML invoices

Invoices in the form of XML files can be collected by ReadSoft Collector 6.5.0 (by email or directly from a file folder) and processed in connection with Kofax ReadSoft Invoices 6.1 or later. The following XML standards are supported:

- Swefaktura
- Finvoice
- E2B
- OIOXML
- OIOUBL
- ESXML
- ebInterface
- Facturae
- ZUGFeRD
- Fattura

However, even invoices that do not use a supported standard or one that use incorrect standard can still be processed by teaching the system what to look for using the XML mapper in Optimize.

For more information on how to process XML invoices, refer to the *Kofax ReadSoft Invoices Help*.

Process invoices received by email

Kofax ReadSoft Collector allows you to use incoming email as the source for data capture. All attachments from the received invoices that match configured criteria are handed over to the Kofax ReadSoft Invoices system for interpretation and further processing.

Mail protocols

Kofax ReadSoft Collector makes it possible to connect and retrieve email and attachments from mail servers that support these standard messaging protocols:

- MAPI or Messaging Application Program Interface (example: Microsoft Exchange Server)
- IMAP or Internet Message Access Protocol (example: Lotus Notes)
- EWS or Exchange Web Services (example: EWS Managed API works with all versions of Microsoft Exchange Server starting with Exchange 2007 SP1)
- EWS with OAuth 2.0

It has not been possible to certify or guarantee all possible MAPI or IMAP configurations in connection with all available mail servers. However, these mail servers have been tested successfully:

- Microsoft Exchange 2010 (MAPI and 64-bit clients are not supported and require IMAP instead)
- Microsoft Exchange 2013 (as in Hot Fix 8)
- Gmail
- Lotus Notes Domino Server
- Office 365 (Use IMAP or EWS. This off-premise solution is dependent upon an internet connection and performance is not guaranteed.)

Input source

Kofax ReadSoft Collector can configure and use different input sources, and you can define which email profile (MAPI) or which server and account (IMAP) must be used to retrieve emails. Different jobs in ReadSoft Invoices can be connected to different input sources, making it possible to simultaneously retrieve email from different mail servers or different profiles. Input sources can also be configured to retrieve XML invoices direct from a file folder.

Legacy email file format

For backward compatibility, Kofax ReadSoft Collector supports the reading of files from the file folder in the format used by the legacy email solution. However, this is not the recommended way to import data into the system, but it may be the only choice for some solutions, such as an integration with an HP MFP.

Filter supported file attachments based on file extension

Kofax ReadSoft Collector can provide preliminary filtering of email attachments based on the file extension. By listing attachment extensions in the Accepted or Ignored lists, you can let the system

know which types of attachments to process as valid documents (examples: PDF, TIFF, PNG, and XML) and which ones to ignore (examples: TXT, LOG, and HTML).

Chapter 6

Installation

The installation package for Kofax ReadSoft Collector must be downloaded from the [Kofax Fulfillment](#) site.

i Make sure you install the latest ReadSoft Collector hotfix to ensure compatibility with Kofax ReadSoft Invoices.

The installation program performs all required deployment actions. For more information, see *Kofax ReadSoft Collector Installation Guide* on product landing page.

License

Kofax ReadSoft Collector does not require any special license key and can be installed on any Kofax ReadSoft Invoices system that meets the system requirements.

Compatibility

ReadSoft Collector 6.5.0 can only be used with following versions of Kofax ReadSoft Invoices:

- 6.1.0 Fix pack 1
- 6.0.3 Fix pack 6 and higher

Configuration and administration

The following features help in configuration and maintenance of ReadSoft Collector with ReadSoft Invoices.

Database Maintenance tool

Kofax ReadSoft Collector has a database maintenance tool that is installed as part of the solution to help administrators perform basic configuration tasks such as creating and maintaining the configuration database.

ReadSoft Collector configuration

Kofax ReadSoft Collector general settings, such as the location of attachment folders, and the administration of input sources and logging settings can be configured using a special ReadSoft Collector configuration wizard. The wizard is accessible from the Plugins menu in Kofax ReadSoft Invoices Manager module, as well as from the Interpret Job settings.

ReadSoft Invoices job configuration

ReadSoft Invoices Interpret jobs can be configured to use Kofax ReadSoft Collector by selecting ReadSoft Collector in the Data source extension field on the Source page of the dialog. All job-specific parameters, such as whether to treat attachments as one document, which attachment-file extensions to accept or reject, which user-defined variables to initialize, and whether to rename received mail attachments before passing them to ReadSoft Invoices are defined in subsequent dialogs.


Customization

This section provides brief information about custom plug-ins in Kofax ReadSoft Collector.

ReadSoft Collector's functionality can be enhanced with the help of custom plug-ins. There are at least six main scenarios in which customization may be required.

- The conversion of file attachments from a non-supported file format (Word or Excel, for examples) to another supported format (such as PDF).
- The preliminary validation of file attachments (for example, to see whether the received PDF files are in a format that is supported by Kofax ReadSoft Invoices).
- The sorting of file attachments and the rerouting of certain files to other systems (for example, workflows or archiving solutions) instead of sending all files to ReadSoft Invoices.
- The extraction of additional data from email and / or file attachments to pass to ReadSoft Invoices (initializing UDVs, Queues, Buyers, etc.).
- The handling of signed and / or encrypted emails.
- The replacement of the standard auto-generated invoice image from XML data with either a custom generated image or the one received from the supplier.

There is no built-in support for these tasks in ReadSoft Collector itself. However, there is an infrastructure in place that allows ReadSoft Professional Services and ReadSoft Partners to build separate custom plug-ins using required business logic. In simple terms, ReadSoft Collector configuration tools provide activation mechanisms that make it possible to easily configure these plug-ins and incorporate them into the ReadSoft Collector flow.

 For plug-ins that were used with Kofax ReadSoft Collector 6.2 to work with Kofax ReadSoft Collector 6.5, references must be updated and the plug-ins must be recompiled.

Translations

Kofax ReadSoft Collector is available in the same languages as Kofax ReadSoft Invoices.

i The desired language setting must be specified in the `eilocal.ini` file available at: `C:\Users\Public\READSOFT\INVOICES` for ReadSoft Collector to display the strings in that language.

Limitations

System requirements and general limitations are listed in *Kofax ReadSoft Collector Installation Guide*.

- Functionality related to using the email's HTML body text as an appendix to the invoice does not work in connection with input sources that use the old IMAP input protocol (that is, nsoftware). However, it has been fully implemented for other protocols and IMAP using Limilabs (recommended).
- Kofax ReadSoft Collector does not support silent upgrades. A two-step workaround is to silently uninstall and silently reinstall the product.
- Encrypted and digitally signed emails are not supported by the current release.
- Microsoft SQL Server is required to store ReadSoft Collector configurations. Oracle is not supported.
- Input source names cannot include the apostrophe (') character.
- Multi-page PDF or TIFF documents containing several invoices in one file separated by barcodes are not supported by default. However, you can save to disk using the plug-in, `SaveEmailAttachmentsToDiskOnlyPlugin.dll`.
- When using the `SaveEmailAttachmentsToDiskOnlyPlugin.dll` plugin to save attachments to disk together with PDF that contain ZUGFerd-XML, the plug-in moves the XML attachments and leaves the PDFs. As a result, the XML files are imported without the original files (PDFs).
- Kofax ReadSoft Invoices Interpret module must be run under the domain user account in order to use MAPI protocol.
- The Outlook integration feature cannot provide a valid link to the erroneous email in an email error log message if Interpret is run as a service. In addition, for the links to work, both emails need to be opened on the same computer where interpretation was performed.
- ReadSoft Collector cannot simultaneously receive emails from two different jobs connected to two different MAPI profiles. If more than one job needs to be configured and run at the same time, the MAPI input sources must use the same MAPI Profile.
- When configuring a MAPI input configuration in ReadSoft Collector, you must log in to the computer with the default profile that receives the incoming email in the mail application on the computer. Domain or local administrator rights are not sufficient to configure the input source.
- Using MAPI when running Interpret as a service is not recommended. If used, only one instance of the Interpret module can be run at a time. In addition, you cannot have two instances running on separate machines either when running Interpret as a service since there is no way to keep the interpretation engine from running a MAPI job, and MAPI jobs cannot be run at the same time. If you need or want to use multiple instances of Interpret, use IMAP.

These settings may be suitable in a system where multiple Interpret instances are used in connection with IMAP (For more information, refer to the INI-file help).

The default value for all three settings is 0 when using a single instance of Interpret per input source system:

- **SystemWideMutexTimeout** = 120

This setting serves to synchronize Interpret instances in terms of email server access.

Synchronization is on the Input source level, meaning that only one Interpret instance can access the input folder for an input source at any given time.


- **MoveEmailTimeOut** = 120

This setting is meant to reduce the number of times when an Interpret instance terminates before it has completed processing an invoice. Once the specified amount of time has elapsed, any Interpret instance can take an invoice for processing. As a result, this setting should be set to a time span that is greater than the maximum time needed to process a mail in the system.

- **EmailProcessingTimeout** = 300

To keep invoices from being reprocessed, this setting determines the amount of time all Interpret instances consider an email to be quarantined after it has been completely processed (when all Interpret instances view it as having been moved to the processed or error folder).

Timeout values are all specified in seconds.

 When you test the system before going system-wide with multiple Interpret instances per input source, it could be advantageous to use the default settings during testing so that you do not have to wait for emails to timeout before you can reprocess them (since the timeouts are immediate, the default setting is 0).

- The maximum path length when saving an attachment from an email is 260 characters. This limit is imposed by the operating system. For more information, refer to the MSDN website.
- Batch mode is not supported in connection with XML invoices.

Chapter 7

Changes in behavior

This chapter describes changes made to the product behavior in Kofax ReadSoft Collector 6.5.0. Advanced rules can no longer be imported in the XML mapper.

Chapter 8

Known issues

This chapter contains information about potential issues that you may encounter while using Kofax ReadSoft Collector 6.5.0. Workarounds are provided, as applicable.

- **11919:** Using single quotation marks in the name of an input source results in an endless loop. To avoid this issue, only use letters and numbers in the names of input sources.
- **3184:** Importing files in the old email format may cause a looping effect if an invoice references two or more image files with the same file name.
Workaround: Avoid using the same file name for different images belonging to one invoice (legacy Email format).
- **3091:** Simultaneous adjustment of the job configuration from the Manager and Interpret modules may generate an error message.
Workaround: Avoid adjusting the same job using two Kofax ReadSoft Invoices modules at the same time.
- When running multiple Interpret instances, deadlocks may occur in the SQL Server Profiler. They are consequently reported in logs on the debug level, but this does not affect the functionality of the product.
- Fields that have been added can be removed, but deleting fields from the Layouts tab of the XML Maintenance dialog is not generally recommended. The layout is a superset of all fields that are included in at least one XML profile. If a field has been deleted and an XML invoice is processed from which the field should be extracted, the invoice will end up in the Error folder. If this happens, the field must be added to the layout again in the correct field group (see the Kofax ReadSoft Collector error log), and the XML file must be rerun.