



FORMS 5-3

Installing and Configuring Virtual ReScan (VRS)

version 4.1 SP2 and later

for use with

FORMS 5-3 and later

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Introduction

Kofax Virtual ReScan (VRS), version 4.1 SP2 and later can be used with FORMS 5-3.

This document describes how to install and configure VRS version 4.1 SP2. The information in this document is based on some basic testing with a couple of different scanners. Since testing was not thorough, ReadSoft cannot guarantee that all VRS scanners will work completely correctly with FORMS.

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

For information about which scanners are certified for use with FORMS, as well as which of those can be used with VRS, please refer one of these sources:

- End users: [FORMS scanner info](#) (on ReadSoft's Customer Web), or contact your local ReadSoft representative
- ReadSoft Partners: [FORMS scanner info](#) (on ReadSoft's Partner Web)
- ReadSoft employees: [FORMS certified scanner list](#) (intranet)

Limitations

With some scanners, FORMS cannot control the scanner buffer when VRS OutOfPaper is enabled. See VRS configuration recommendations on page 12 for details.

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

You do not have to be an Administrator or have Administrator privileges in order to run VRS 4.1 SP2 under standard default Windows user permissions. However, you *must* have Administrator privileges in order to install VRS 4.1 SP2. Administration privileges are required for installing scanner components, as well.

VRS Basic or VRS Professional?

There are two versions of VRS 4.1 SP2:

- “Basic” has the same functionality as the previous version (3.5).
- “Professional” features are also available. These include:
 - Content-based rotation.
 - Blank page deletion.
 - White background cropping and deskew.
 - Some new functionality for color scanning. However, FORMS does not support color or grayscale scanning with VRS.

Recommendation

Use VRS 4.1 SP2 Basic for desktop scanners, such as Fujitsu fi-4120C, Canon DR-2080C, Panasonic KV-S2026, etc.

Use VRS 4.1 SP2 Professional for workgroup and production scanners, such as Fujitsu fi-4530C, 5650C, 4340C, 5750C, Canon DR-3060, 3080C, 6080, 9080C, etc.

Installing FORMS

Install FORMS 5-3 or later, *before* installing VRS.

During installation of FORMS, *select Kofax* when prompted to choose between Kofax and ISIS. If you miss this, then adjust this as described in “Specifying Kofax as the scanner interface” on page 9.

Installing VRS

Upgrading from previous versions

VRS 3.5

You can install VRS 4.1 SP2 over an existing installed version of VRS 3.5.

Earlier versions

You cannot install VRS 4.1 SP2 over a version of VRS that is earlier than VRS 3.5. Upgrade to VRS 3.5 before proceeding with the VRS 4.1 SP2 installation. You can download the VRS 3.5 upgrade from the Support pages on Kofax's website at <http://www.kofax.com/>.

Instructions

After installing FORMS, complete these steps in order.

Note that VRS must be reinstalled each time you upgrade FORMS. (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. If used, 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.

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

After installation

If the scanner is very new, it may be necessary to install updated ISIS drivers for the scanner to get the correct version. It may also be necessary to download a Component Installer that upgrades the Kofax VRS runtime for newer scanners. Check these sites for more information:

- Download site for version 4.1
(http://www.kofax.com/support/IP/VRS/4.1/4.1_downloads.asp)
- Kofax Scanner Configurator (<http://scadmin.kofax.com/KCSearch/Search.aspx>).

To easily find out if a component installation is necessary:

1. In the Scanner Configurator, select **All Configurations**.
2. Select the **Manufacturer**—for example Canon.
3. Select the **Scanner**—for example DR-4010c. In the results you see that this scanner is certified for use with VRS 4.10 SP2 using either USB or an Adrenaline 650(i) interface.
4. Click **DETAILS** for the desired configuration.

The **Scanner configuration notes** section of the results inform you that a component installer is necessary and a link to the download page is provided.

Activating the VRS license

In most cases, the VRS license is activated during installation. However, if you see warning messages that it has not been activated, use the below procedure.

Note: You need the license information that came with the installation.

1. Select **Start** menu > **All Programs** > **Kofax VRS** > **Activate VRS**.

Activate VRS

User Identification

Name:

Company:

Email:

Please do not contact me with product information.

Upgrade from VRS 3.5 to a 4.10 Basic license

Enter product identification for a license

Product Identification

Part Number: - -

Serial Number:

Product Code:

VRS Version:

Scanner:

Machine ID:

License Code

If you already have a license code, enter it here:

2. Type in the information that came with your license.
3. Click **Activate**.

Configuring FORMS

Specifying Kofax as the scanner interface

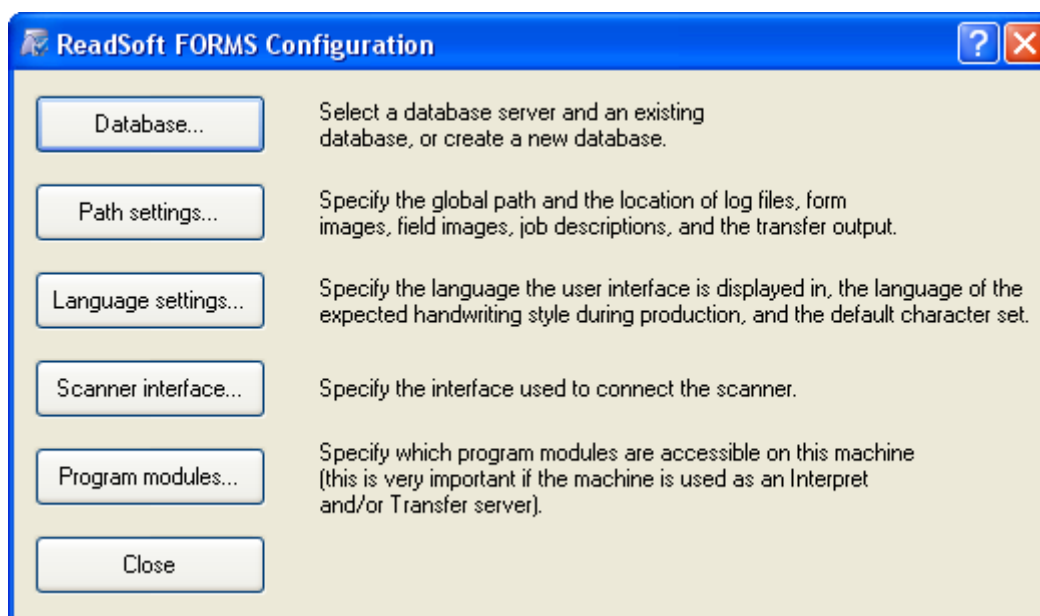
This is only required if you did not select Kofax when prompted to during FORMS' installation.

The settings for each workstation are saved in `Ehlocal.ini`:

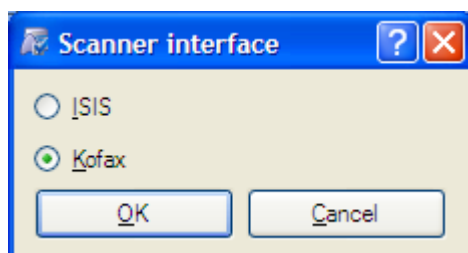
- Default location in Windows XP and Windows Server 2003 R2: `C:\Windows` directory.
- Default location in the newer operating systems: `C:\Users\Public\ReadSoft\FORMS`.

Use the FORMS Configuration Tool to change the ScanCard setting in `Ehlocal.ini`:

1. Select **Start menu > All Programs > ReadSoft > ReadSoft FORMS 5-3 > Configuration > Configuration Tool**.



2. Click **Scanner interface**.

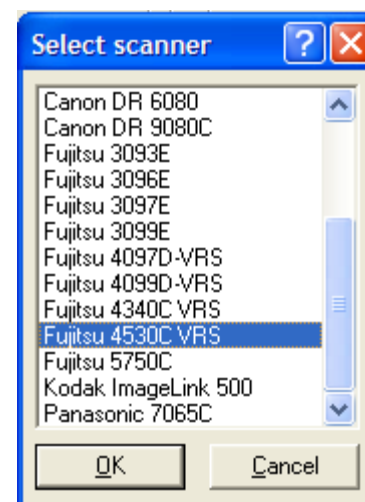


3. Select **Kofax** and click **OK**.
4. Click **Close** to close the Configuration Tool.

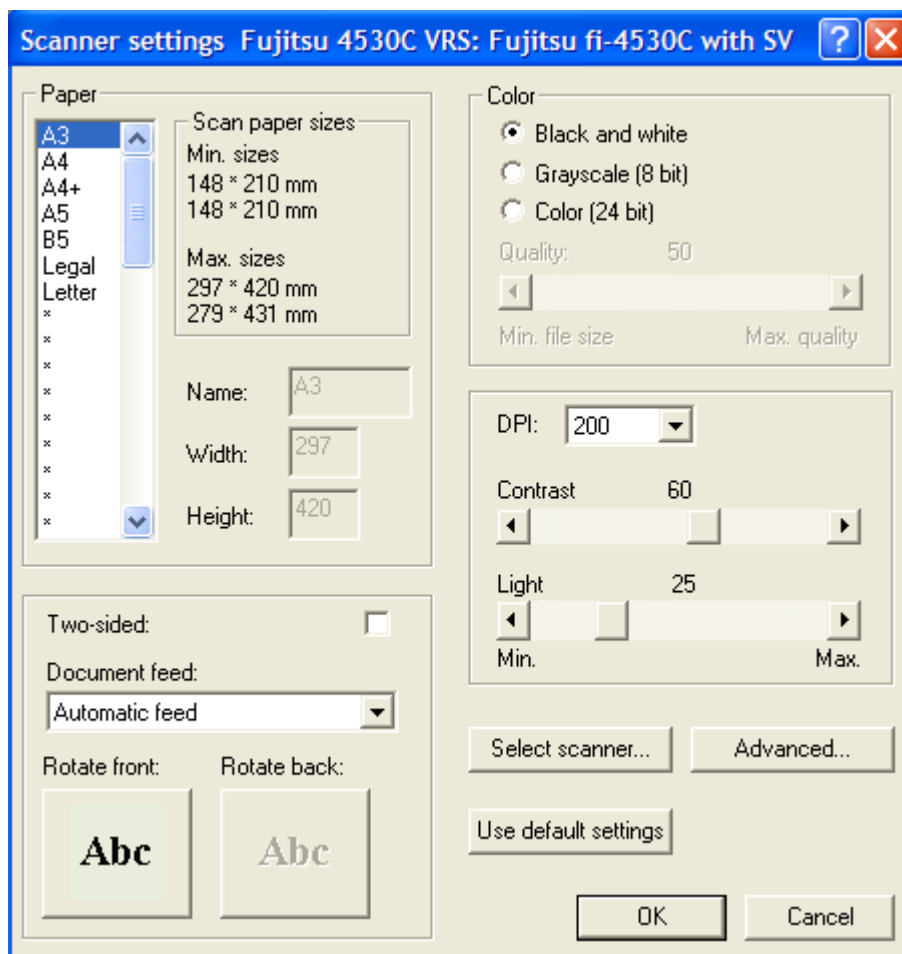
Adjusting the scanner settings

1. Using the Manager module, open FORMS' **Scanner settings** dialog.
2. Click **Select scanner**.
3. 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 (see “Specifying the VRS scanner solution” on page 12). Therefore, it does not matter which scanner is selected in the **Select scanner** dialog. Still, the program does require you to choose one.)



4. Click **OK** to close the **Select scanner** dialog.
5. In the **Scanner settings** dialog:
 - Set the paper size to **A3** (or **Max**). VRS's cropping function ensures the correct paper size.
 - 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.



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

Specifying the VRS scanner solution

FORMS and VRS scanning

Since VRS cannot be controlled from within FORMS, problems can arise when scanning unidentified forms making it difficult to use VRS with FORMS. There are also limitations with endorsing when using VRS.

If you are not able to or you do not want to use VRS or AIPE but still want some image processing or improvement capabilities, we recommend that you scan through an ISIS interface (SCSI, USB, or FireWire) using FORMS and not Kofax. In this way, you have access to specific ISIS settings in our dialogs or in `Ehlocal.ini` (see *FORMS Help* for more information).

VRS scanning solutions

The VRS scanning solution that you can select depends on your scanner and VRS license (ISIS vs. HVRS, for example). If ISIS is used, the scanner can be connected through a SCSI, USB, or FireWire interface, whereas HVRS/VRS is only available if an Adrenaline SCSI card is used to connect the scanner.

In all cases, the Kofax VRS runtime is installed and used whether VRS itself is used or not. Descriptions of the various options are found below.

<Scanner> with VRS/SVRS

VRS software is used to scan, improve, and deliver the images to FORMS. This occurs outside of FORMS, and VRS settings can only be controlled from the VRS software.

<Scanner> with VRS/SVRS with AIPE

A scan source (SCSI, USB, or FireWire) uses VRS to scan, improve, and deliver the images to FORMS. This occurs outside of FORMS, and VRS settings can only be controlled from the VRS software.

AIPE (Adrenaline Image Processing Engine) settings can also be used and controlled from the **Advanced scanner** settings dialog in FORMS (see *FORMS Help*).

Separate AIPE licensing is required. It is available through one of the following:

- Included with Adrenaline 650i SCSI card
- An AIPE Hardware USB key
- Included with VRS Professional Workgroup or Production license (Hardware USB key or software-based license).

<Scanner> without VRS/SVRS with AIPE

A scan source (SCSI or USB) is used with AIPE image processing (see previous heading), but VRS is not used.

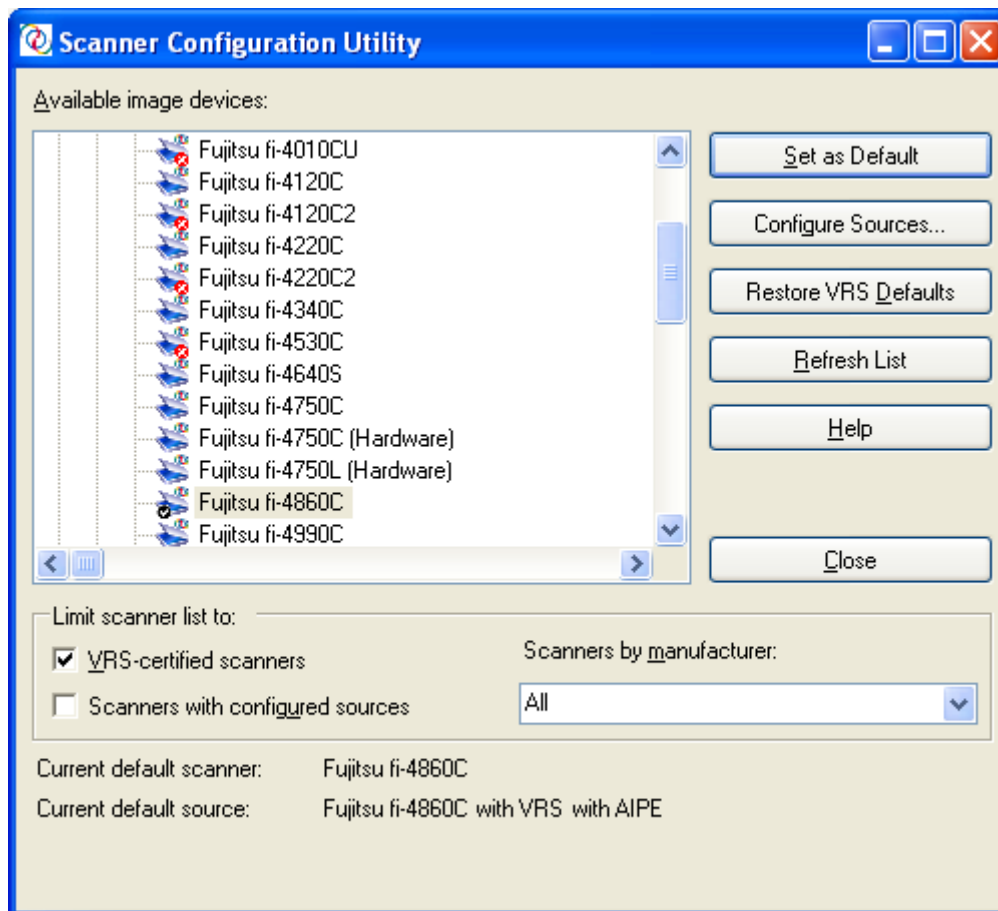
<Scanner> without VRS/SVRS

The Kofax VRS runtime is installed, but neither VRS nor AIPE scanning alternatives are available. This is the option that is used most often with FORMS.

Specifying the default scanner and VRS solution

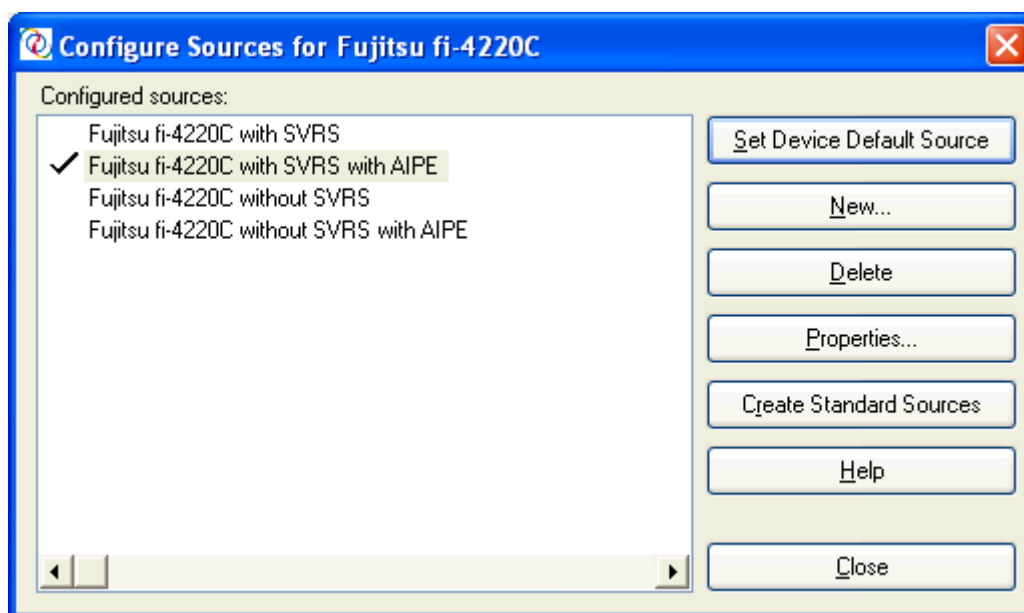
Use this procedure to specify the default VRS scanner that FORMS communicates with (see “Specifying Kofax as the scanner interface” on page 9) and to specify the Kofax scanning solution that is used.

1. Select **Start** menu > **All Programs** > **Kofax VRS** > **Scanner Configuration Utility**.



2. Select the scanner in the list and click **Set as default**. If this is not done, FORMS’ Scan module will not load the correct scanner.

3. Select **Configure sources**.



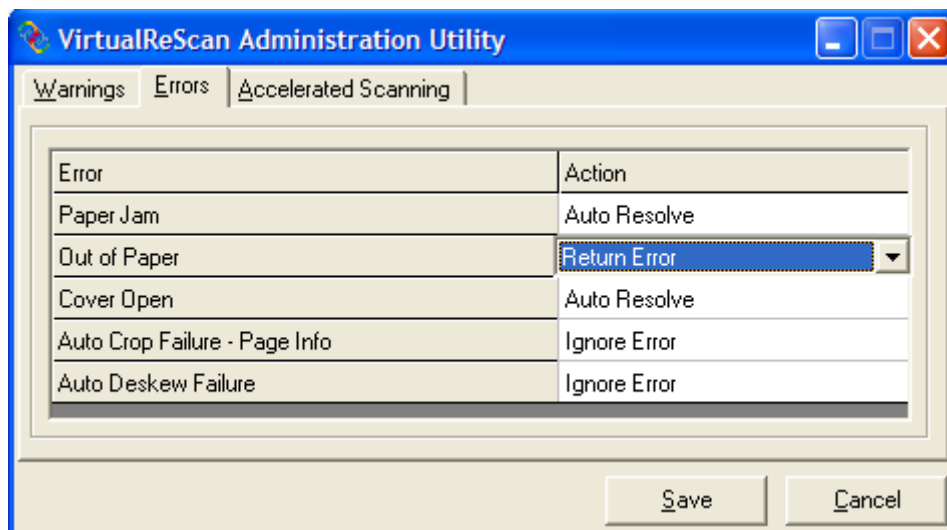
4. Select the scanner configuration you want to use under **Configured sources** and click **Set Device Default Source** (see “VRS scanning solutions” on page 12).
5. Click **Close**.

VRS configuration recommendations

The work VRS does is outside of and totally transparent to FORMS, which is why it is not possible to access VRS settings from FORMS' user interface. VRS settings are saved in separate profiles, and FORMS' Scan module uses the latest settings for the default VRS profile (see “Specifying the VRS scanner solution” on page 12 for more information).

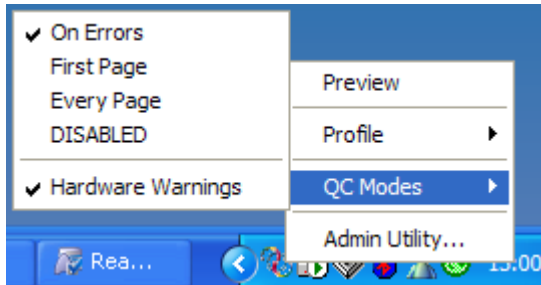
This section describes recommended adjustments to some of the basic VRS settings. (For more detailed information please see VRS Help or the VRS user manual.)

1. Using the Manager module, open FORMS' **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 Utility**. This opens the **VirtualReScan Administration Utility** dialog.
3. Click the **Errors** tab and set **Out of Paper** to **Return Error**.



4. 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.)



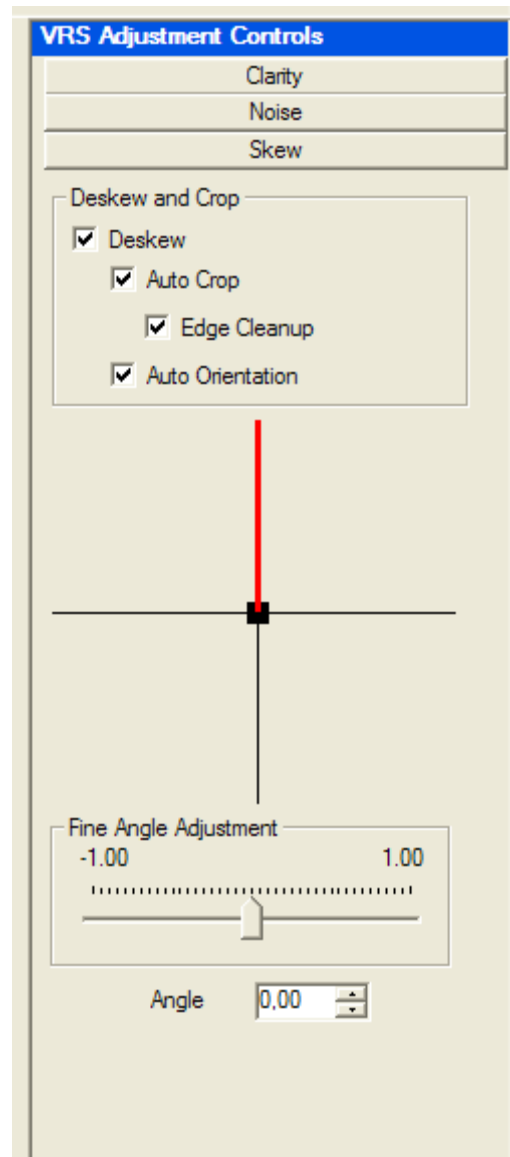
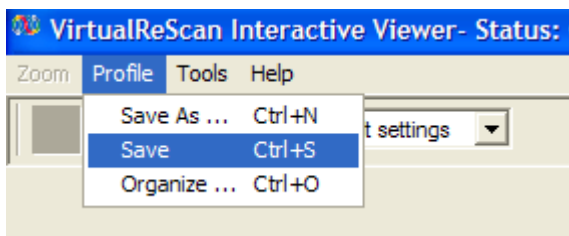
- Right-click the VRS icon again, and select **QC Modes > Hardware Warnings**. When this option is selected, hardware errors such as paper jam, out of paper, etc. are handled according to the **Actions** set in the Administration Utility (above). If this option is not selected, it is as if **Return Error** were selected as the **Action** for each hardware error.

- Right-click the VRS icon again, and select **Preview**. The **VirtualReScan Interactive Viewer** dialog opens.
- Ensure that **Default settings** are selected in the dropdown box.
- 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.)

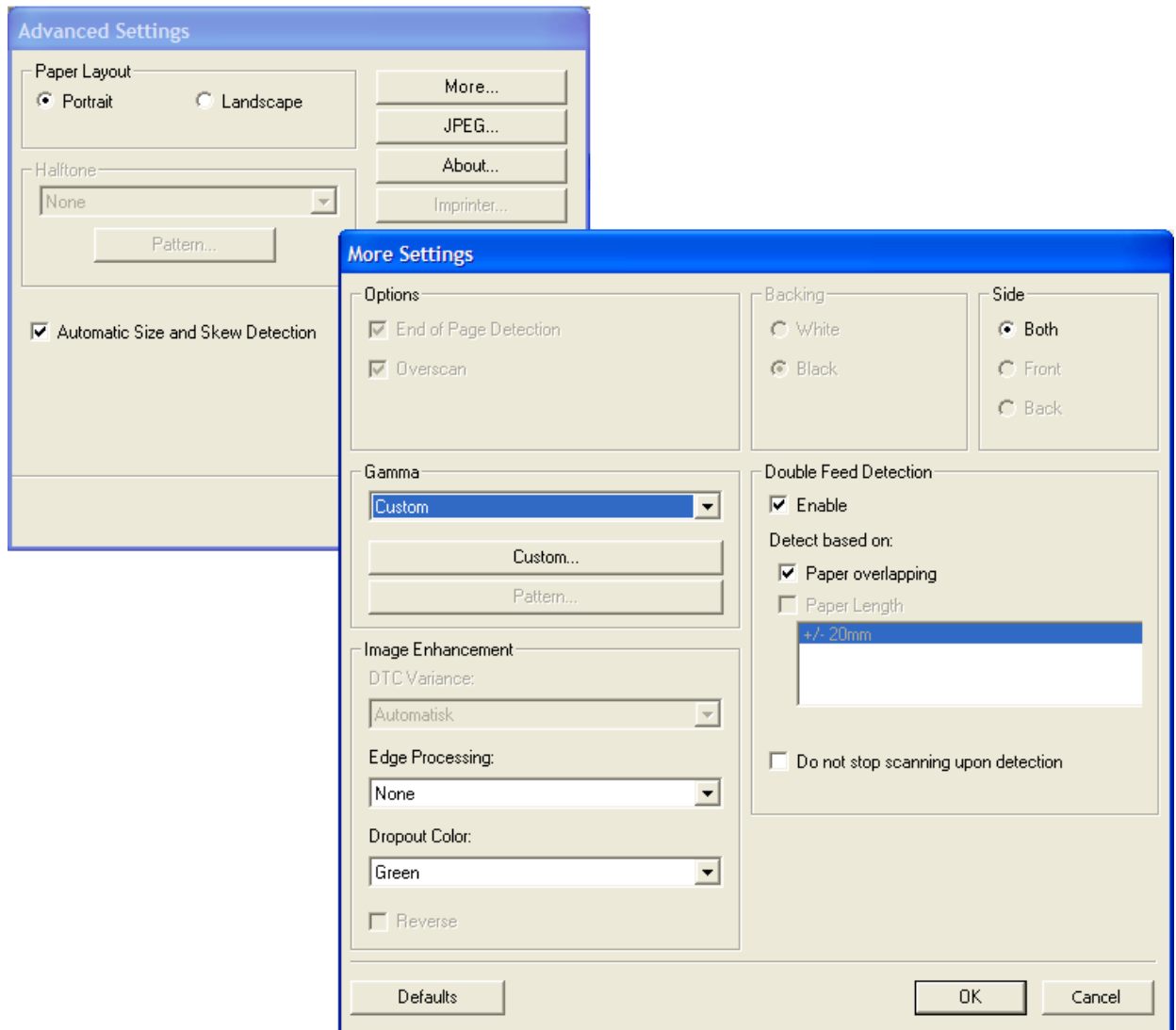
Warning: On the **Clarity** tab, do not deselect **Auto Brightness**. It must be selected for the default profile.

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



11. 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 by ReadSoft.



- Click **OK** to close the **More Settings** and **Advanced Settings** dialogs.

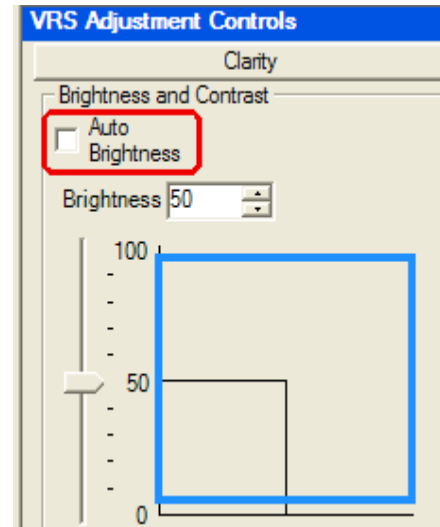
12. Recommended if images are darker than desired: On the **Clarity** tab, lower the **Contrast** setting by about 5-15.

13. Resave the settings. (Click **Profile > Save**.)

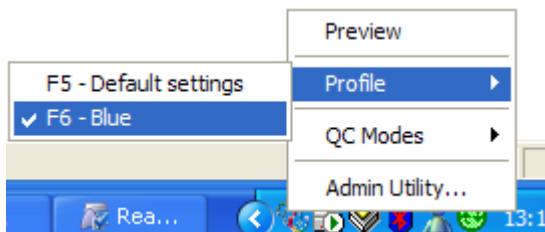
Optional: Creating your own profiles

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**.
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. 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.
4. 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. 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 <i>only</i> the Manager or <i>only</i> Scan is running when you access VRS settings.
The scanner does not work when you try to use it with the Scan module.	<p>Check if the scanner works with VCDemo. Select Start menu > All Programs > Kofax VRS > VCDemo.</p> <p>If it works there, check that the correct scanner and scanner configuration are specified as the default (see "Specifying the VRS scanner solution" on page 12 for more information).</p> <p>If you still receive a general error message that Kofax runtime has a problem with ISIS, install the latest ISIS drivers for the scanner (or the ones that came with the scanner)</p> <p>Check the manufacturer's website or http://www.kofax.com/support/downloads.asp for updated drivers.</p>
Warning dialogs indicate that VRS is not active.	Activate VRS. See page 8 for more information.