

easyINDEX v2 Setup Guide

Code-Free Dynamic Validation and Verification Document/Module Skipping
for Kofax Capture

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1 Overview

This guide is intended to show how to install and configure the **easyINDEX v2** workflow agent for Kofax Capture.

It assumes a working knowledge of Kofax Capture batch class setup and an understanding of the standard Kofax workflow process.

easyINDEX v2 is supported for Kofax Capture version 9, 10, and 11.

2 Installation

To install **easyINDEX v2** follow the steps below:

-Unzip the **easyINDEX_v2.zip** file and copy **easyINDEX_Setup.dll**, **easyINDEX_Runtime.dll** and **easyINDEX_v2.AEX** to the Kofax Capture Install Path ...\\Bin folder

-In the Administration module, select Tools>Workflow Agent Manager and Add

-Browse to the **easyINDEX_v2.AEX** file and select it

-Select **easyINDEX v2** and Install

easyINDEX v2 should now be installed and ready for use.

2.1 Upgrade Installation

If you currently use an older version of **easyINDEX** then once you have installed the latest version (v2), go to the Properties>Workflow Agents tab of any Batch Classes using **easyINDEX** and add **easyINDEX v2** and remove **easyINDEX**.

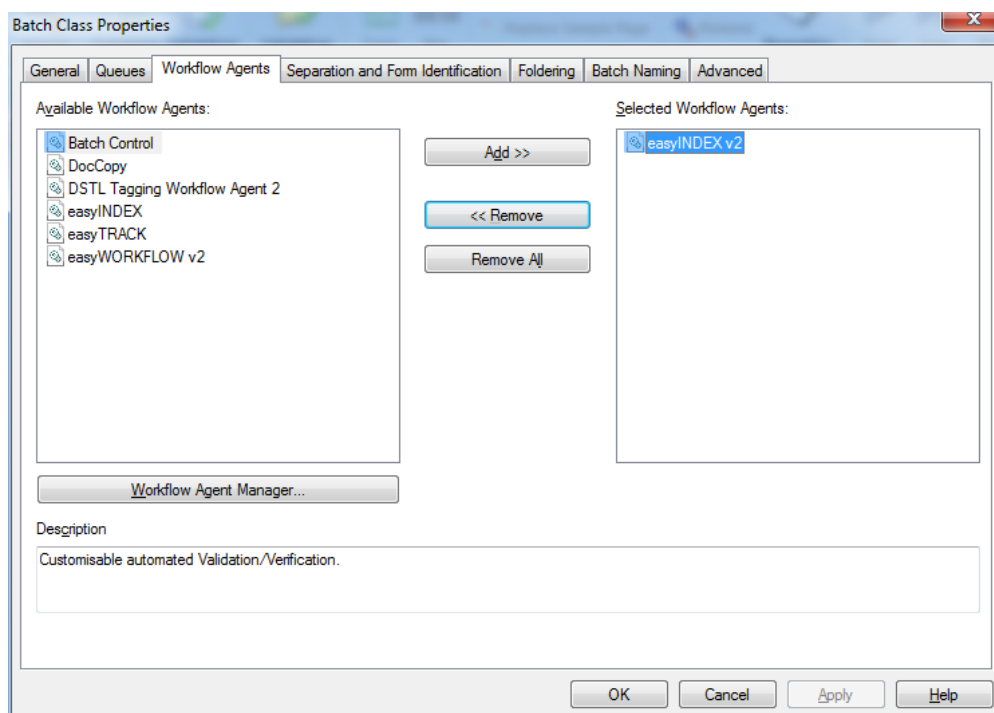
All previously defined settings will be preserved, but you need to re-publish the Batch Class for the new version to be used.

NB. You can run both versions of **easyINDEX** on the same system, but not on the same Batch Class. It is strongly advised to remove earlier versions and only use the latest version.

3 Configuration

3.1 Adding easyINDEX to a Batch Class

To add **easyINDEX v2** to a Batch Class, select the Workflow Agents tab from the Batch Class properties, and add **easyINDEX v2** to the Selected Workflow Agents list.



Once **easyINDEX v2** has been added to a Batch Class, right-clicking on the Batch Class will show the **easyINDEX v2** Setup menu item.

3.2 Minimum Requirements

In order to use **easyINDEX v2** a Batch Class must use at least one of the following modules: Validation or Verification. There must also be at least one Document Class defined with at least one Index Field.

The screenshot shows the 'easyINDEX - Licensed to ABC Ltd' window. It has a title bar with a close button. The main area is divided into several sections:

- Document Classes:** A list box containing 'Northwest' (selected) and 'Tri-Spectrum'.
- Batch Level Options:** Three checkboxes: 'Skip Validation if all documents are marked valid' (unchecked), 'Skip Verification if all documents are marked verified' (unchecked), and 'Don't run after QC or Batch Manager' (checked).
- Update Document Class Settings:** A button.
- Remove Document Class Settings:** A button.
- Validation Settings:**
 - Fields:** A list box containing 'Name', 'Order Value', 'Customer Number', 'Address1', 'Address2', and 'Postcode'.
 - When selected fields are:** Radio buttons for 'populated' (selected), 'empty', 'confidence', and 'value'. There are also dropdown menus for '>' and '='.
 - Take the following action:** Radio buttons for 'mark valid' (selected), 'mark invalid', and 'reject document'.
- Verification Settings:**
 - Fields:** A list box containing 'Name', 'Order Value', 'Customer Number', 'Address1', 'Address2', and 'Postcode'.
 - When selected fields are:** Radio buttons for 'populated' (selected), 'empty', 'confidence', and 'value'. There are also dropdown menus for '>' and '='.
 - Take the following action:** Radio buttons for 'mark verified' (selected), 'mark unverified', and 'reject document'.

A 'Close' button is located at the bottom right of the window.

3.3 Settings

The section below details how to configure **easyINDEX v2** processing for a batch class.

3.3.1 Document Classes

This is a close-up of the 'Document Classes' list box from the main window. It contains two entries: 'Northwest' (highlighted with a blue background) and 'Tri-Spectrum'.

The list of document classes which are included in the current batch class is shown. If there are previously configured settings, then these will be automatically displayed.

Selecting any of the document classes from the list will show the configured settings for that module.

NB. The settings can vary for each document class, and any or all of the document classes can have settings applied in the same batch class.

3.3.1.1 Validation Settings

Select the fields to check: any or all fields can be selected.

Select the type of check: selected fields populated
selected fields empty
selected fields confidence level test
selected fields specific value test

Select the action to take: mark valid
mark invalid
reject (optionally enter a custom rejection note)

Validation Settings

Fields

- Name
- Order Value
- Customer Number
- Address1
- Address2
- Postcode

When selected fields are:

☐ populated

☐ empty

☒ confidence > 80

☐ value =

Take the following action:

☒ mark valid

☐ mark invalid

☐ reject document

Where multiple fields are selected, the test must be true for ALL selected fields. In the settings above, the document will be marked as valid where the confidence levels for *Customer Number* AND *Name* are above 80%. If either field has a lower confidence, the document will not be marked valid.

In Validation only those documents not marked valid by **easyINDEX v2** will be shown to the user. Those marked valid will be skipped and not displayed.

All documents are still associated with the batch, and if necessary can still be viewed in Validation.

3.3.1.2 Verification Settings

Select the fields to check: any or all fields can be selected.

Select the type of check: selected fields populated
selected fields empty
selected fields confidence level test
selected fields specific value test

Select the action to take: mark valid
mark invalid
reject (optionally enter a custom rejection note)

Verification Settings

Fields

- Name
- Address
- Account Reference
- LookupResult
- Address1
- Address2
- Postcode

When selected fields are:

☐ populated

☐ empty

☐ confidence > <

☒ value <> TRUE

Take the following action:

☐ mark verified

☐ mark unverified

☒ reject document

lookup failed

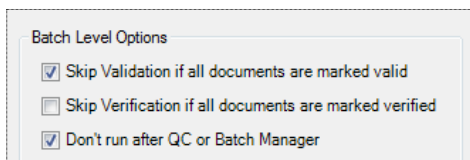
In the settings above, the document will be rejected where *LookupResult* is NOT EQUAL to 'TRUE'.

Where multiple fields are selected, the test must be true for ALL selected fields.

In Verification only those documents not marked verified by **easyINDEX v2** will be shown to the user. Those marked verified will be skipped and not displayed.

These documents are still associated with the batch, and if necessary can still be viewed in Verification.

3.3.2 Batch Level Options

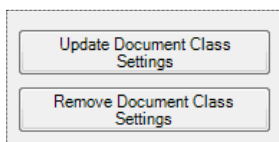


It is possible when using document class settings for **easyINDEX v2** that all documents in a batch could be marked as valid or verified. If this is the case, it may be desirable to skip the validation/verification module completely for that batch. Selecting the **Skip Validation if all documents are marked valid** or **Skip Verification if all documents are marked verified** options will allow this.

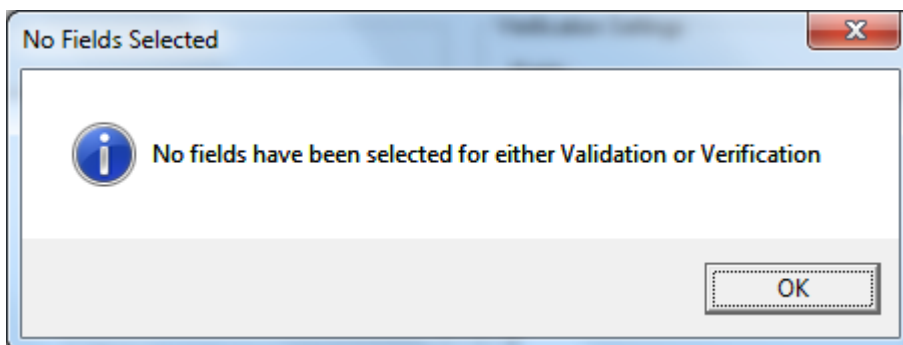
It is possible with some settings that Validation/Verification would always be skipped by **easyINDEX v2** and it would not be possible to manually enter validation/verification for those batches. If it is required that users may want to be able to manually force batches into a module even where **easyINDEX v2** has marked them to skip it, select the batch level option **Don't run after QC or Batch Manager** and then manual changes can be made. This is the default option.

3.3.3 Update Settings

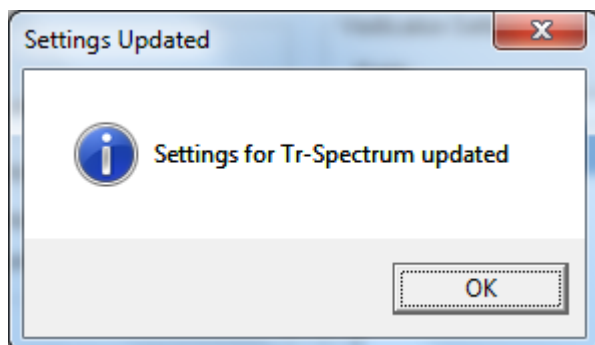
To update settings for a selected module, click the **Update Document Class Settings** button.



The settings will be checked for validity, and a warning will show if there are any problems. You must have selected at least one field for either validation or verification processing.

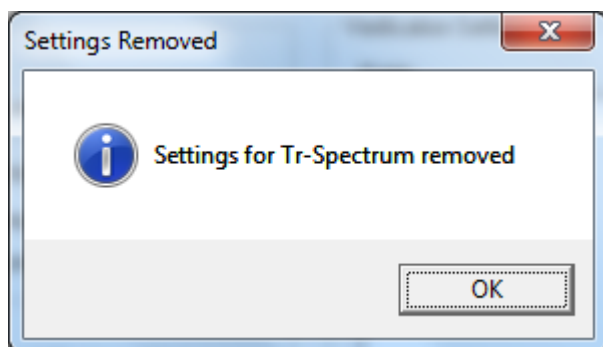


If no errors are detected, the settings will be applied.



3.3.4 Remove Settings

To remove settings for a particular module, simply click the **Remove Document Class Settings** button.



3.3.5 Make Settings Live

As with other changes to Kofax Capture batch classes, if changes are made to **easyINDEX v2** configuration for a batch class it must be re-published for these changes to be made live.

4 General Considerations

4.1 Skip If Cannot Load

An option exists in Kofax workflow agents to skip if not loaded. This option can be set to TRUE or FALSE.

If set to TRUE, if a workstation processes a batch but does not have **easyINDEX v2** installed, it will just ignore the settings.

If set to FALSE, if a workstation processes a batch but does not have **easyINDEX v2** installed, it will cause an error and the batch will be sent to Quality Control.

By default **easyINDEX v2** is set to TRUE. If it is required to set this to FALSE, then the easyINDEX_v2.AEX file needs to be edited so that the highlighted line reads FALSE instead of TRUE. **easyINDEX** then has to be re-registered via Workflow Agent Manager in the Administration module. **No other changes must be made to easyINDEX_v2.AEX**

```
[Workflow Agents]
easyINDEX v2

[easyINDEX v2]
WorkflowAgentID=easyINDEX v2
WorkflowAgentProgID=easyINDEX.Runtime
WorkflowAgentFile=easyINDEX_Runtime.dll
Description=Customisable automated Validation/Verification.
Version=2.0
SupportsNonImageFiles=True
SetupProgram=Workflow Agent Setup
WorkflowAgentSkipIfCantLoad=True

[Workflow Agent Setup]
OCXFile=easyINDEX_Setup.dll
ProgID=easyINDEX.Setup
Visible=0
MinSizeX=300
MinSizeY=150
BatchClassMenus=easyINDEX Menu

[easyINDEX Menu]
MenuText=easyINDEX v2 Properties...
```

4.2 Processing

easyINDEX v2 runs at the close of each module in the Kofax workflow. At this stage, documents are marked according to the configured settings for the next module (if the next module is one of those for which settings have been configured).

For this reason **easyINDEX v2** must be installed on the Kofax station that will run the module before any modules which have settings defined.

4.3 Running Processes Multiple Times

It is possible that other workflow agents, or manual actions can force a batch into the same module more than once. This can cause unpredictable outcomes, and it is advised that **easyINDEX v2** is tested fully with all other scripts/agents before using in a live environment.

4.4 Setting Documents Valid

When setting documents valid, they will not be automatically opened in Validation and/or Verification.

This is usually the desired behaviour, but it is important to check that no other processes are set to run in Validation or Verification, as these may not run for the documents which have been marked valid.

5 Contact

For support and assistance please contact mail@davidcrewe.com