

easyQA v2 Setup Guide

Code-Free Custom Quality Control, Validation and Verification QA
Processing for Kofax Capture

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1 Overview

This guide is intended to show how to install and configure the **easyQA 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.

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

2 Installation

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

-Unzip the **easyQA_v2.zip** file and copy **easyQA_Setup.dll**, **easyQA_Runtime.dll** and **easyQA_v2.AEX** to the Kofax Capture Install Path ...\\Bin folder

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

-Browse to the **easyQA_v2.AEX** file and select it

-Select **easyQA v2** and Install

easyQA v2 should now be installed and ready for use.

2.1 Upgrade Installation

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

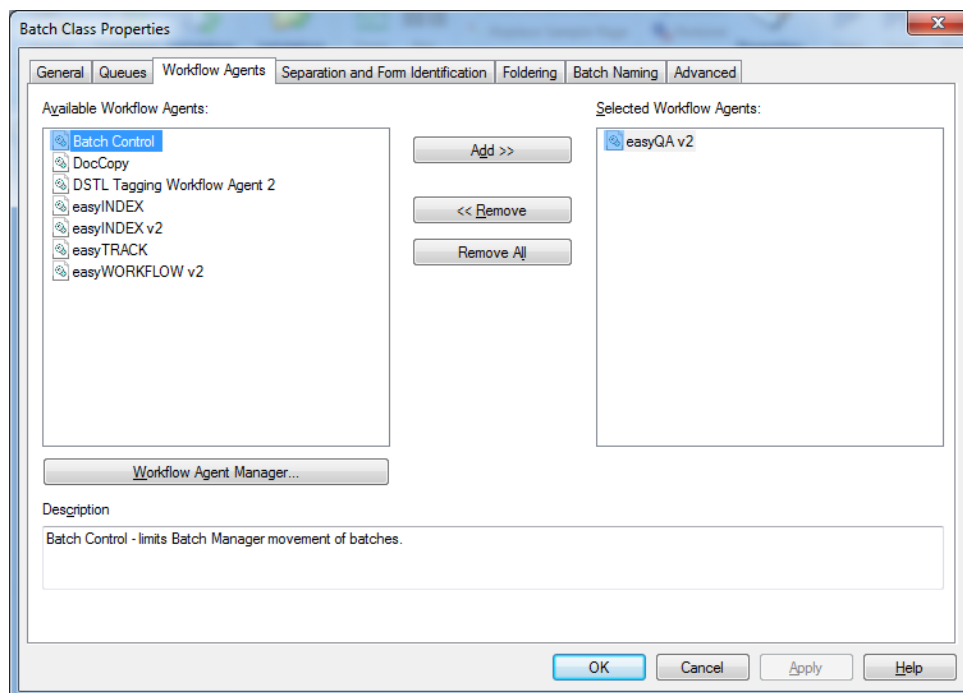
All previously defined settings will be preserved, but you need to re-publish the Batch Class for the new version to be used.

NB. You can run both versions of **easyQA** 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 easyQA v2 to a Batch Class

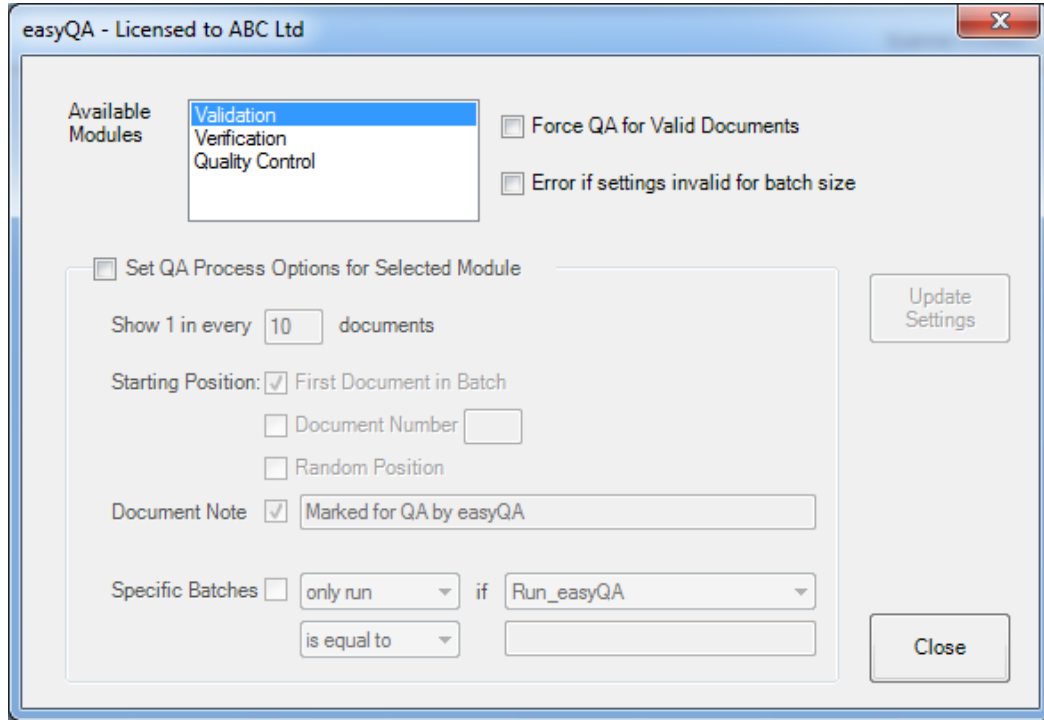
To add **easyQA v2** to a Batch Class, select the Workflow Agents tab from the Batch Class properties, and add **easyQA v2** to the Selected Workflow Agents list.



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

3.2 Minimum Requirements

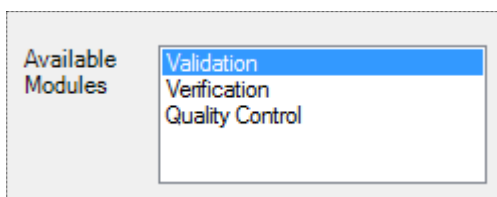
In order to use **easyQA v2** a Batch Class must use at least one of the following modules: Quality Control, Validation or Verification.



3.3 Settings

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

3.3.1 Available Modules



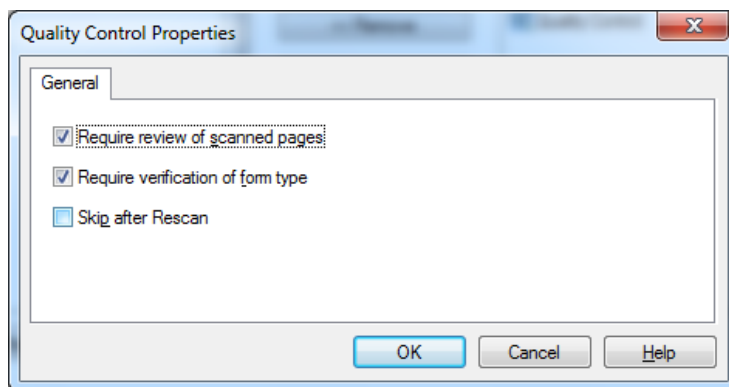
The list of modules which are included in the current batch class, and supported by **easyQA v2** is shown. If there are previously configured settings, then these will be automatically displayed.

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

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

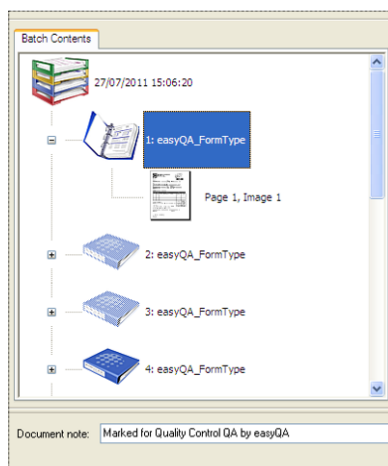
3.3.1.1 Quality Control

When processing **easyQA v2** for Quality Control, the **Require review of scanned pages** and **Require verification of form type** options are supported. Documents marked for QA will require whichever of these is selected. Those skipped by **easyQA** will automatically have Reviewed/Verified set to true and will not need to be checked in Quality Control.



NB. If neither option is selected, all documents will be shown in Quality Control.

Batch contents show only those documents requiring review/verification. **easyQA v2** set to show 1 in 3 documents.



3.3.1.2 Validation

In Validation only those documents marked for QA will be shown to the user. Those not marked will be skipped and not displayed.

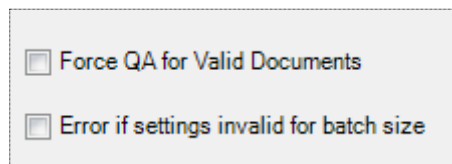
These documents are still associated with the batch, and if necessary can still be viewed in Validation.

3.3.1.3 Verification

In Verification only those documents marked for QA will be shown to the user. Those not marked 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 Force QA For Valid Documents



Force QA for Valid Documents

Error if settings invalid for batch size

There may be cases where documents have already been marked as valid – for example when a batch is partially validated and suspended, or via a script or other automatic method. In these cases it may not be desirable to re-apply the **easyQA v2** settings as this could cause the same document to be re-validated.

The default **easyQA v2** settings only apply to documents not yet validated (or checked in QC or Verified – depending on the current module). Checking the **Force QA for Valid Documents** will ignore any current Valid/Invalid document status and apply **easyQA v2** settings to the whole batch.

Example of an already partially validated batch with **easyQA v2** configured to show every third document and starting at first document.

Document	Status	Force checked	Force not checked
1	Already Validated	✓	✗
2	Already Validated	✗	✗
3	Already Validated	✗	✗
4	Already Validated	✓	✗
5	Already Validated	✗	✗
6	Not Validated	✗	✓
7	Not Validated	✓	✗
8	Not Validated	✗	✗
9	Not Validated	✗	✓
10	Not Validated	✓	✗

✓ document displayed in module

✗ document not displayed in module

3.3.3 Error if settings invalid for batch size

Force QA for Valid Documents

Error if settings invalid for batch size

It is possible to configure settings during **easyQA v2** setup that may not be consistent with actual batch sizes when scanning in production. In these cases it could happen that no documents are marked for QA.

Examples include:

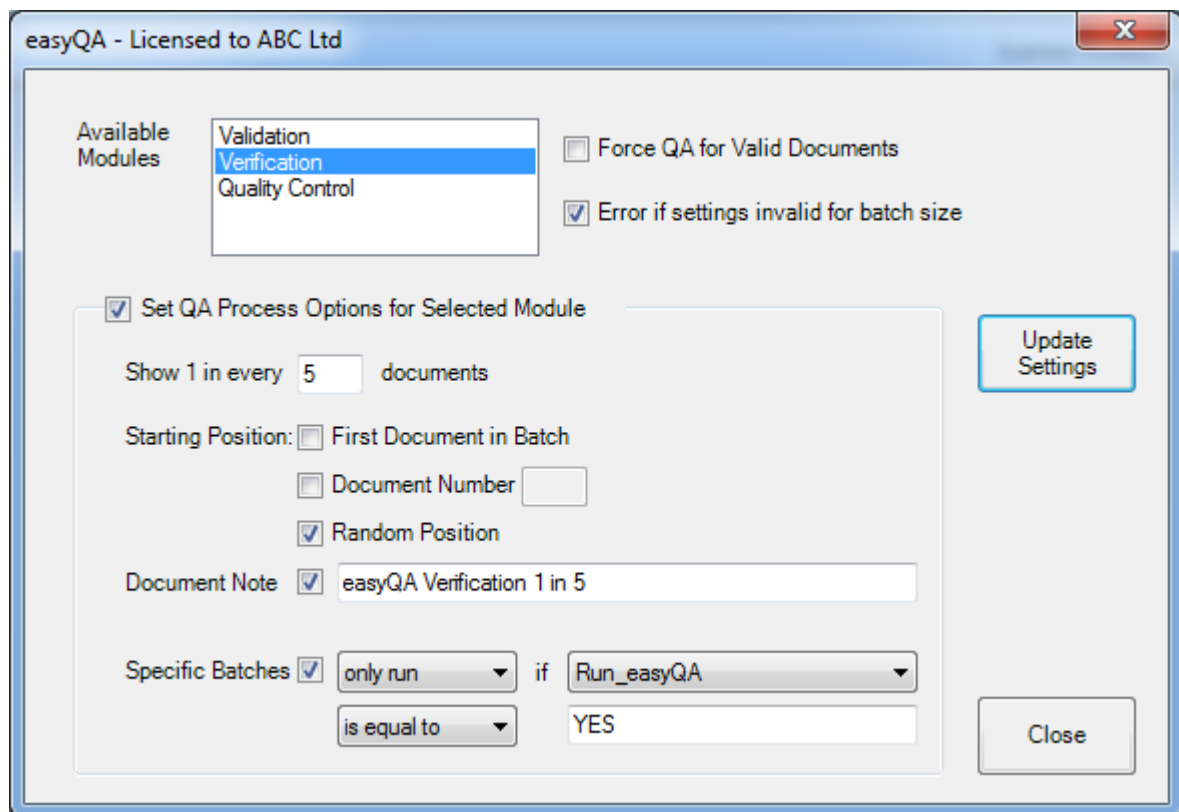
- Start document is selected as document 10 and there are only 5 documents in the batch.
No documents will be marked for QA
- Show one in 10 documents is selected and the start point is selected as 20.
Document 10 will not be marked but 20, 30, 40 etc will be marked for QA

easyQA v2 will process according to the settings defined. However, if you wish to ensure consistency, select the **Error if settings invalid for batch size** option. If this option is selected then batches not meeting consistency checks will be routed to QC.

3.3.4 Set QA Process Options for Selected Module

To configure or edit settings for a particular module, select the module from the **Available Modules** list and check the **Set QA Process Options for Selected Module** box.

The setup screen is enabled and shows any currently configured settings.



The screenshot shows a window titled "easyQA - Licensed to ABC Ltd". On the left, under "Available Modules", a list contains "Validation", "Verification" (highlighted), and "Quality Control". To the right of this list are two checkboxes: "Force QA for Valid Documents" (unchecked) and "Error if settings invalid for batch size" (checked). Below the "Available Modules" list is a large checkbox labeled "Set QA Process Options for Selected Module", which is checked. This checkbox is followed by a large rectangular area containing several settings: "Show 1 in every 5 documents" (with a text input field containing "5"); "Starting Position:" with three options: "First Document in Batch" (unchecked), "Document Number" (with a text input field), and "Random Position" (checked); "Document Note" with a checked checkbox and a text input field containing "easyQA Verification 1 in 5"; and "Specific Batches" with a checked checkbox, a dropdown menu set to "only run", an "if" dropdown menu set to "Run_easyQA", and a second dropdown menu set to "is equal to" followed by a text input field containing "YES". On the right side of the settings area, there are two buttons: "Update Settings" and "Close".

3.3.4.4 Show 1 in every n documents

This option sets the number of documents to show in the selected module.

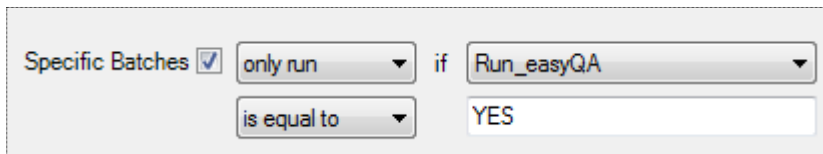
3.3.4.5 Starting Position

This option determines which is the first document to be shown – First, Specific Number or Random. Where Random is selected, a number between 1 and the number specified in the Show 1 every n documents will be used as the starting point.

3.3.4.6 Document Note

Select whether or not a note should be assigned to the document. This note will be shown for the document in the relevant module.

3.3.4.7 Specific Batches



Specific Batches only run if Run_easyQA is equal to YES

Select whether the settings for the currently selected module should only be applied to specific batches. Select whether to run or not, based on the value of a specific Batch Field.

In the example above **easyQA v2** processing will only run for the selected module, when a batch has the value YES in the Batch Field Run_easyQA.

3.3.5 Update Settings

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

The settings will be checked for validity, and a warning will show if there are any problems.

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

3.3.6 Remove Settings

To remove settings for a particular module, simply uncheck the **Set QA Process Options for Selected Module** box.

3.3.7 Make Settings Live

As with other changes to Kofax Capture batch classes, if changes are made to **easyQA v2** configuration for a batch class 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 **easyQA v2** installed, it will just ignore the settings.

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

By default **easyQA v2** is set to TRUE. If it is required to set this to FALSE, then the easyQA_v2.AEX file needs to be edited so that the highlighted line reads FALSE instead of TRUE. **easyQA v2** then has to be re-registered via Workflow Agent Manager in the Administration module. **No other changes must be made to easyQA_v2.AEX**

```
[Workflow Agents]
easyQA v2
```

```
[easyQA v2]
WorkflowAgentID=easyQA v2
WorkflowAgentProgID=easyQA.Runtime
WorkflowAgentFile=easyQA_Runtime.dll
Description=Customisable QA Settings for Kofax Capture.
Version=2.0
SupportsNonImageFiles=True
SetupProgram=Workflow Agent Setup
WorkflowAgentSkipIfCantLoad=True
```

```
[Workflow Agent Setup]
OCXFile=easyQA_Setup.dll
ProgID=easyQA.Setup
Visible=0
MinSizeX=300
MinSizeY=150
BatchClassMenus=easyQA Menu
```

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

4.2 Processing

easyQA 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 **easyQA 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.

When this happens, **easyQA v2** will ignore all those documents which have already been processed unless the **Force QA For Valid Documents** flag is set.

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