



Taskmaster APT

Quick Start Guide

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Introduction to Taskmaster APT SP1

Taskmaster APT SP1 is Datacap's Accounts Payable Technology solution for automating the process of capturing invoices. Using optical character recognition (OCR) and highly configurable location rules, Taskmaster APT accurately captures all critical invoice data including invoice number, invoice date, purchase order number, invoice total, and the data from each invoice line item. Invoice images and data are then delivered automatically to your accounts payable, ERP, document management, and other back-end systems.

Invoice Automation Process

- 1 **Create a batch of invoices.** The process begins when you create a batch of invoice images in Taskmaster APT. The images can come from a scanner, MFP device, e-mail or exist as previously scanned images in a folder.
- 2 **Process invoice images.** Taskmaster APT "cleans up" the images by performing operations such as deskew, deline, despeckle and, if necessary, image rotation. A "fingerprint" is then created. Fingerprints are Datacap's proprietary method of identifying the vendor associated with each invoice and the locations of the data fields on the image to be captured. Taskmaster APT searches the fingerprint library for a matching fingerprint. A lookup is performed to see which vendor that fingerprint is associated with, and if a remittance zip is found, an additional lookup is made to an accounts payable vendor database to determine the Vendor Number. The OCR engine is used to extract all necessary data from the invoice. Taskmaster APT then runs the validation rules on the data.
- 3 **Verify invoice data.** The invoice image is displayed alongside the invoice data fields so a person can verify that the extracted data is correct. Taskmaster APT makes it fast and easy to identify potential data problems. Fields that failed validation are presented with a red background, field characters that have been reported by the OCR engine as being low confidence (potentially in error) have a yellow background. High confidence fields are presented with a blue background. The verify operator can then look at the image and correct any errors.
- 4 **Export invoice images and data.** Taskmaster APT formats the invoice data for input into your financial, content management systems or other business applications. Datacap provides release scripts for systems used with Taskmaster APT such as SharePoint, FileNet, Alchemy, and OnBase, as well as others. Universally formatted text, CSV and XML, can be used to export the data to any business application, and invoice images can be exported in TIFF or PDF format. New vendor fingerprints also have their zones "remembered" for the next time the invoice format is encountered. This process is called Intellocate.

Benefits of Invoice Automation

- **Increase productivity and reduce costs.** Your Accounts Payable department can process more invoices with fewer staff.
- **Enhance data accuracy while reducing time investigating data errors.** Image clean-up and validations enable AP clerks to easily and quickly make data corrections.
- **Capitalize on invoice discounts and avoid late penalties.** Automation speeds processing and allows you to capitalize on early-pay discounts and avoid late-fee penalties.

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- **Avoid costly incorrect and duplicate invoice payments.** Manual processing is subject to human error that can result in incorrect payments that, in turn, require additional supplier interactions for investigation and correction.

Introduction to Taskmaster APT SP1 Quick Start Guide

This Taskmaster APT SP1 Quick Start Guide provides the information you need in order to run Taskmaster APT Windows-based (not Web-based) tasks in an existing Taskmaster 7.5 SP1 environment where all components are installed on a single machine (referred to as the Workstation in these instructions). Included with Taskmaster APT are sample images of invoices and a separator page. These samples are included so you can use Taskmaster APT out-of-the-box without additional setup steps required.

Also included with Taskmaster APT is a small utility program (Add Vendor Demo.exe) that lets you add vendors to a vendor list that simulates your Accounts Payable Vendor database. Since APT out-of-the-box cannot access your company's actual Accounts Payable Vendor database to perform vendor lookups and validation, the vendor list is used instead.

This Quick Start Guide also provides information for setting up Taskmaster APT to process your own invoice images, as well as how to restore APT to its original state after you have given a demonstration in order to give the demonstration again.

These instructions assume you are running Taskmaster APT with all components installed on a single machine, and these instructions guide you through just a subset of the capabilities that are available.

Remember, Taskmaster APT is a foundation application that provides a starting place for the customizations that will adapt it to meet your company's specific processing needs.

Before You Begin

Before you begin following the instructions in this Taskmaster APT Quick Start Guide, ensure you have met the requirements listed below.

Prerequisites

Before you begin using Taskmaster APT, ensure:

- You have a working Taskmaster 7.5 SP1 environment with all components installed on a single Workstation. By default, Taskmaster APT is installed when you perform a complete installation of Taskmaster 7.5 or later. For complete details, see the Taskmaster 7.5 SP1 Installation and Configuration Guide (found in the root folder on the installation media or in the c:\Datacap\Docs folder).
- At a minimum, ensure at least one of the sample applications runs correctly. This makes troubleshooting APT easier, and narrows down the sources of potential problems.
- Ensure you have administrator rights on the Workstation.

Install Optional Grid Control

Taskmaster APT lets you view invoice line items in a separate window where the line item data is displayed in a spreadsheet-like grid.

APT allows you to display this window using either the default, read-only grid layout, or to use an optional grid layout that allows you to make and save changes to the displayed line item data.

The default, read-only grid layout looks like this:

ID	ItemID	ItemDesc	Qty	Price	LineTotal
1. Lineitem0	1000-NM	Base Charge	1	2100.00	2100.00
2. Lineitem1	1100-NM	Mileage	50	3.00	150.00
3. Lineitem2	3200-NM	3" Remote Valve	1	500.00	500.00
4. Lineitem3	13001-NM	Additional Man	1	400.00	400.00
5. Lineitem4	Discount	Discount	1	-1100.00	-1100.00

The optional read-write, interactive grid layout looks like this:

Qty	Item	Description	Unit Price	TOTAL
1	1000-NM	Base Charge	2100.00	2100.00
50	1100-NM	Mileage	3.00	150.00
1	3200-NM	3" Remote Valve	500.00	500.00

Line Number	ItemID	ItemDesc	Qty	Price	LineTotal
1	1000-NM	Base Charge	1	2100	2100.00
2	1100-NM	Mileage	50	3	150.00
3	3200-NM	3" Remote Valve	1	500	500.00
4	13001-NM	Additional Man		400	400.00
5	Discount	Discount	1	-1100	-1100.00

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Tax	107.63	SubTotal	2157.63	Recalc
Shipping	0.00	Invoice Total	2157.63	Done
Lineltem Total	2050	Difference	0.00	

To use the interactive grid, you must:

- Have a licensed version of Microsoft Office 2003 or later installed on the Workstation
- Download and install the Office Web Components add-in (the filename of the Office 2003 Add-in installation package is OWC11.exe) from the Microsoft website on the Workstation
- Make a simple configuration change to the APT settings.ini file

To install and configure the interactive grid, do the following:

- 1 Open Internet Explorer, go to the Download Center on Microsoft's website, and search for OWC11.exe. Your search should result in a link to Office 2003 Add-in: Office Web Components.
- 2 Download and install the Office 2003 Add-in: Office Web Components package from Microsoft's website on the Workstation.
- 3 Navigate to and, using a text editor like Notepad, open the c:\Datacap\APT\process\settings.ini file.
- 4 Locate the [Settings] section, and the ListFormName=list.DCF line.
- 5 Add a single quote at the beginning of the ListFormName=list.DCF line (to comment it out) and remove the single quote at the beginning of the ListFormName=msggrid.DCF line to uncomment it, then save and close the settings.ini file.

Set Up Optional Email Notifications

Out-of-the-box, Taskmaster APT supports sending email notifications using Microsoft Outlook to specific email addresses when an invoice in a batch is deleted, marked for review, or marked for rescan.

To set up email notifications, you must:

- Have the Microsoft Outlook client fully installed and configured on the Workstation so that you can send and receive emails using it
- Make a simple configuration change to the APT settings.ini file

To configure Taskmaster APT to send email notifications, do the following:

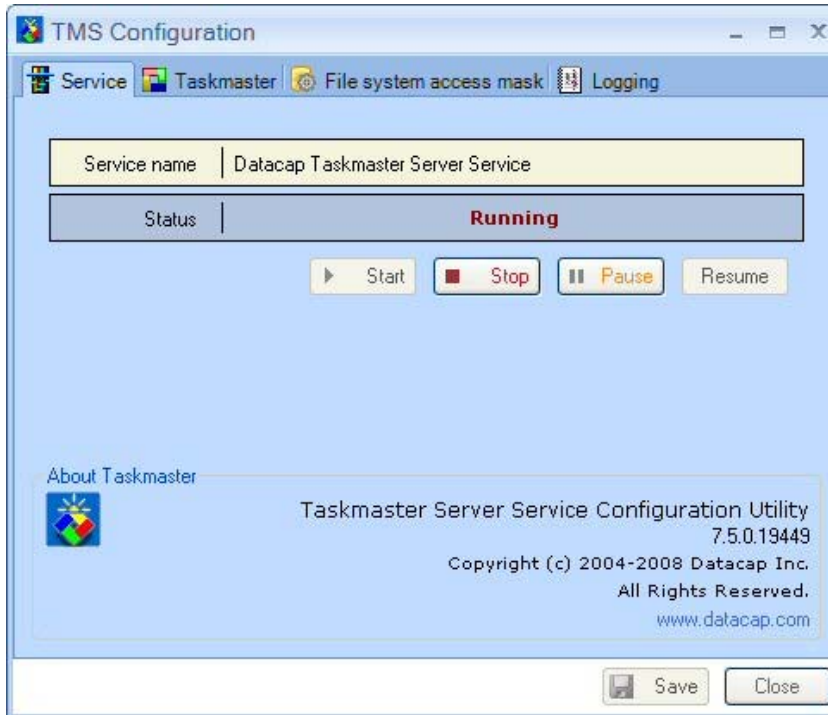
- 1 Using Windows Explorer, navigate to, and, using a text editor like Notepad, open the c:\Datacap\APT\process\settings.ini file.
- 2 Locate the [Notifications] section, and the lines:
`Delete= email@someplace.com`
`Rescan= email@someplace.com`
`Review= email@someplace.com`
- 3 Change the email addresses as appropriate, then save and close the settings.ini file.

Start Taskmaster Server Service

Every configuration of Taskmaster (all components installed on a single Workstation or separate components installed on different machines) requires that the Taskmaster Server Service be running before you can successfully start the application.

To start the Taskmaster Server Service, from your Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

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The status should be *Running*, if not, click Start. A Starting Service message is displayed. The Status changes to *Running* when the service is started.

Close the TMS Configuration window.

Using Taskmaster APT

This section provides the information you need to process the sample (pre-scanned) images included with Taskmaster APT through APT. The sample images consist of four one-page invoices, a separator page, and one two-page invoice, and are provided so you can run Taskmaster APT “out of the box” using a “virtual scan” without having to hook up a real scanner to the Workstation. For information on how to process your own pre-scanned invoice images through APT, see the instructions in [Set Up Taskmaster APT to Process Your Invoice Images](#) starting on page 23.

Overview of Taskmaster APT

Taskmaster APT is delivered with several different pre-configured “jobs.” A job is a collection of tasks to perform and rules to run that process invoices. The default shortcuts you see when you start APT allow you to start and run various job-task combinations. APT’s pre-configured jobs include:

- Demo
- Demo-Dot Matrix
- Demo-Multipage TIFF
- Web Demo
- Web Demo-Dot Matrix
- Web Main
- Web Main-Dot Matrix

(Note that Taskmaster APT also includes Main Job and Main Job-Dot Matrix, however these jobs are only displayed after your Datacap Implementation Specialist has customized the configuration to your particular scanners.)

The Demo job is used as the example in this Taskmaster APT Quick Start Guide. When running the Demo job, the default shortcuts you run, and the sequence in which you run them using the Taskmaster APT Client are as follows:

This shortcut	Does this
Scan	Allows you to select the Demo job, and run the VScan (virtual scan) task to bring the sample invoice images into Taskmaster APT.
Background	Starts the Batch Profiler task that performs many image processing functions including: identification of pages, image cleaning (e.g. despeckling), image rotation (if necessary), full page character recognition, and more. It also attempts to identify the invoice by comparing it to a library of known invoices.
Verify	Starts the Verify task that displays the sample invoice images and the data that has been recognized in the Verify window so you can ensure the data is complete and correct. When an invoice is not a known invoice, the Verify window allows you to identify the fields and data on it, and to save its fingerprint so it will be recognized the next time.

This shortcut	Does this
Export (or Background)	Starts the Export task that completes processing of images, saves information about the invoices, and exports field data to XML files for input into your Accounts Payable, document imaging, or ERP system. (Depending on the available batches and their current statuses, clicking the Background shortcut will run either the Batch Profiler task or the Export task.)

Start Taskmaster APT

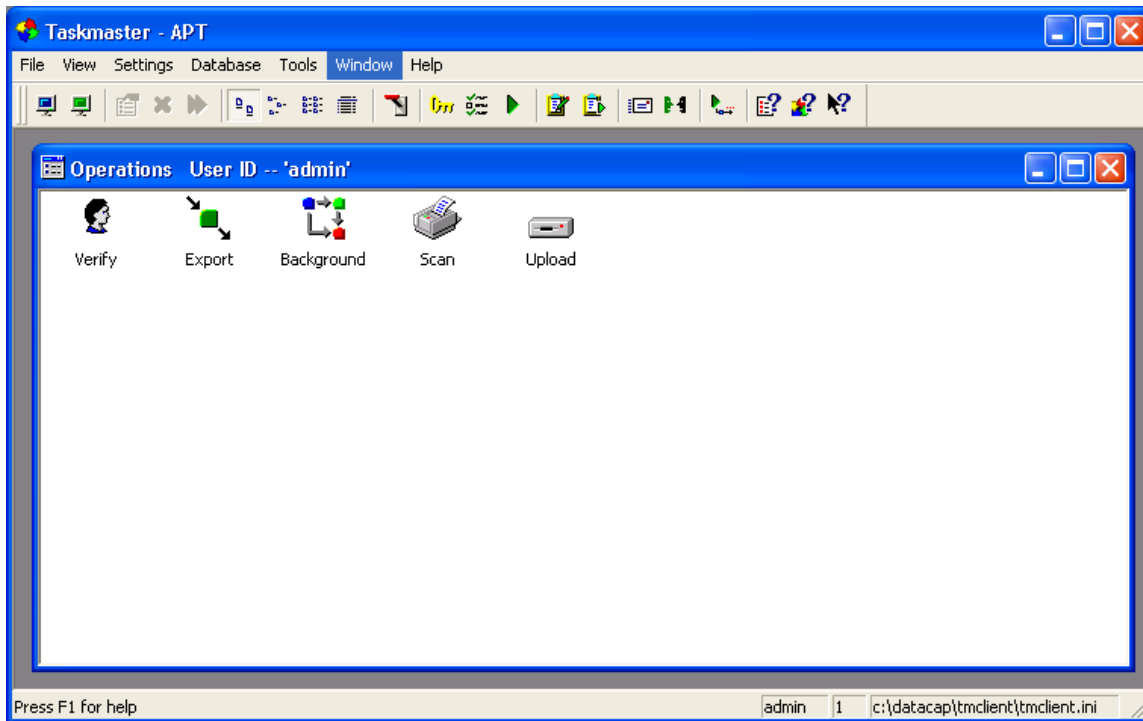
To run the Taskmaster APT Client, either open the Datacap folder on your desktop and click



the APT Client application shortcut, or, from your Windows Start menu, select All Programs, select Datacap, select Applications, select APT and click APT Client.

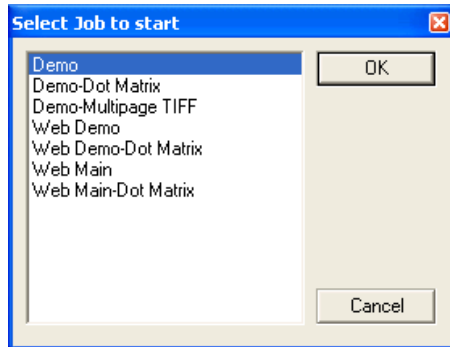
On the Select Taskmaster Server window, enter a server address of **127.0.0.1** and click OK. On the Please login window, enter **admin** for User ID and Password, then click OK.

The Taskmaster APT application starts, and displays the Operations window.



Run VScan Task (Scan Icon)

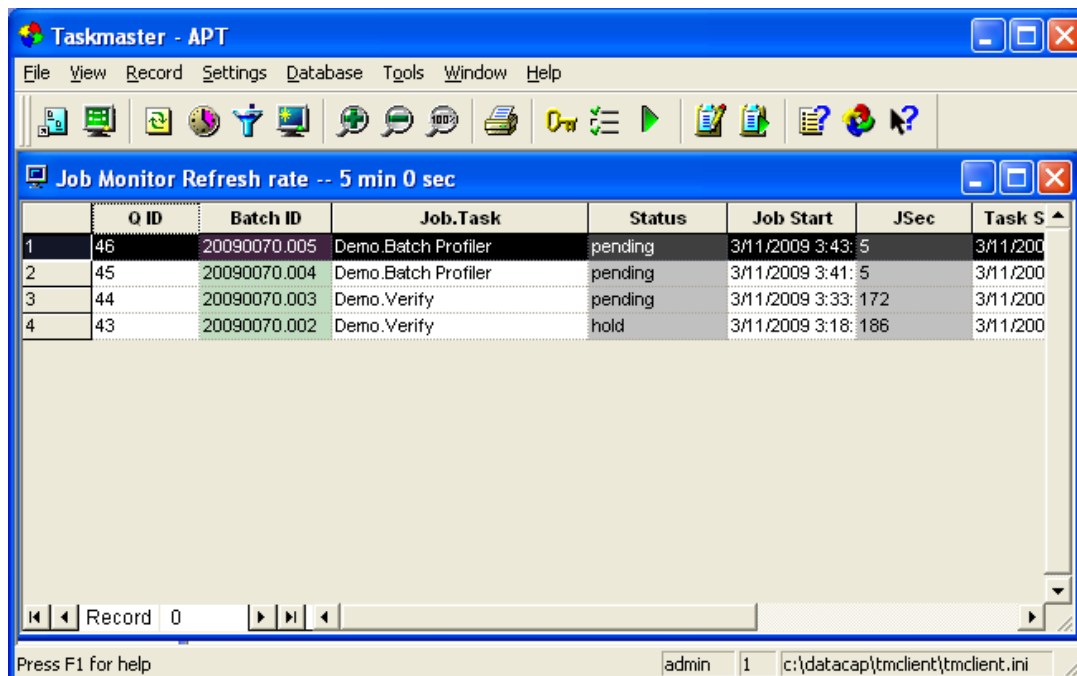
Double-click the Scan icon, select Demo and click OK.



A Rulerunner status window briefly appears as the images are processed. When processing is complete, a message box is displayed indicating the task has finished. Click OK. Another message box asks “Do you want to continue processing?” Click No.

APT has picked up the images from the c:\Datacap\APT\images\Input folder and created a Taskmaster “batch,” a collection of document images to be processed. It assigned a batch ID and created a folder with the name of the batch ID in c:\Datacap\APT\batches. This folder holds all of the document image processing results for this batch of invoices.

Open the Job Monitor window by clicking the View menu and selecting *Job Monitor*. Refresh the information displayed in the Job Monitor window by clicking the window’s title bar and pressing F5. The Job.Task and Status for this batch have been updated and are now *Demo.Batch Profiler* and *pending*.



Run Batch Profiler Task (Background Icon)

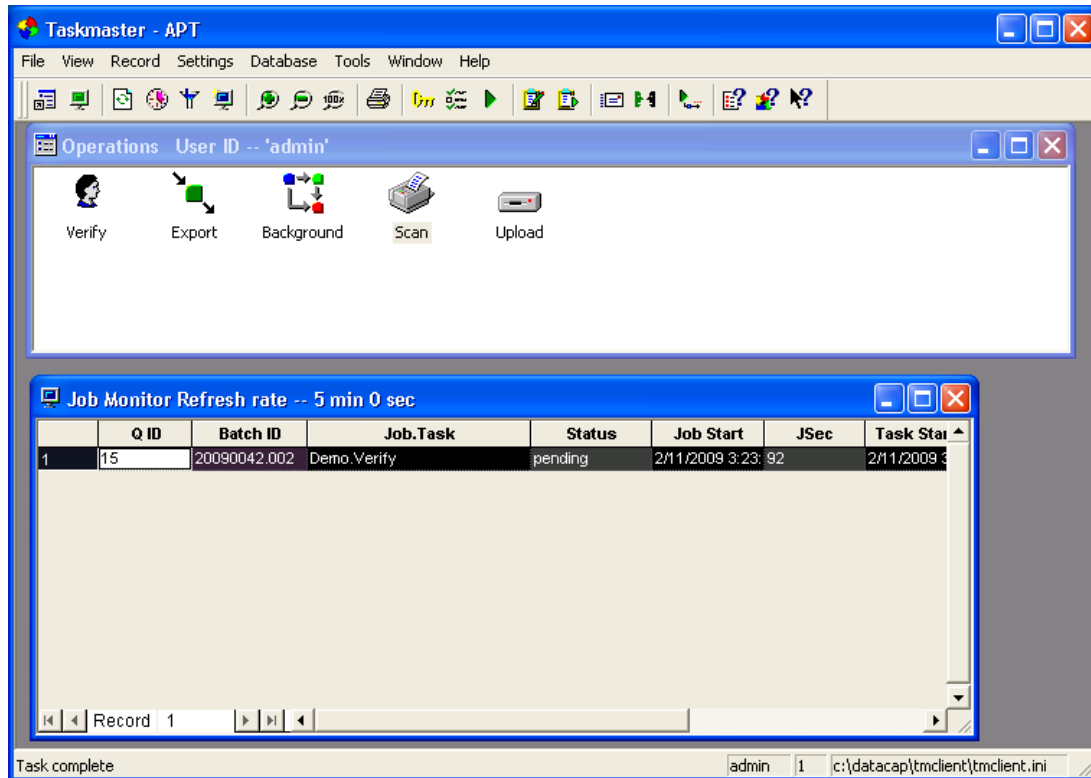
After running the VScan task, run the Batch Profiler task for this batch by double-clicking the Background icon in the Operations window, or double-clicking the batch number (e.g. “45”) of

the batch you want to run in the Job Monitor window and clicking Yes in response to the prompt.

The Rulerunner status window is displayed as the document images are processed. This may take a few minutes, as Rulerunner is running a number of processing-intensive modules, including PageID, ImageFix, CreateDocs, Recognize, FindFingerprint, Locate, lookups, and others.

When processing is complete, a message box is displayed indicating the task has finished. Click **OK**. Another message box asks “Do you want to continue processing?” Click No.

Refresh the information displayed in the Job Monitor window by clicking the window’s title bar and pressing F5. The Job.Task and Status for this batch have been updated and are now *Demo.Verify* and *pending*.



Run Verify Task

Run the Verify task by double-clicking the Verify icon in the Operations window, or double-clicking the batch number of the batch you want to run in the Job Monitor window and clicking Yes in response to the prompt.

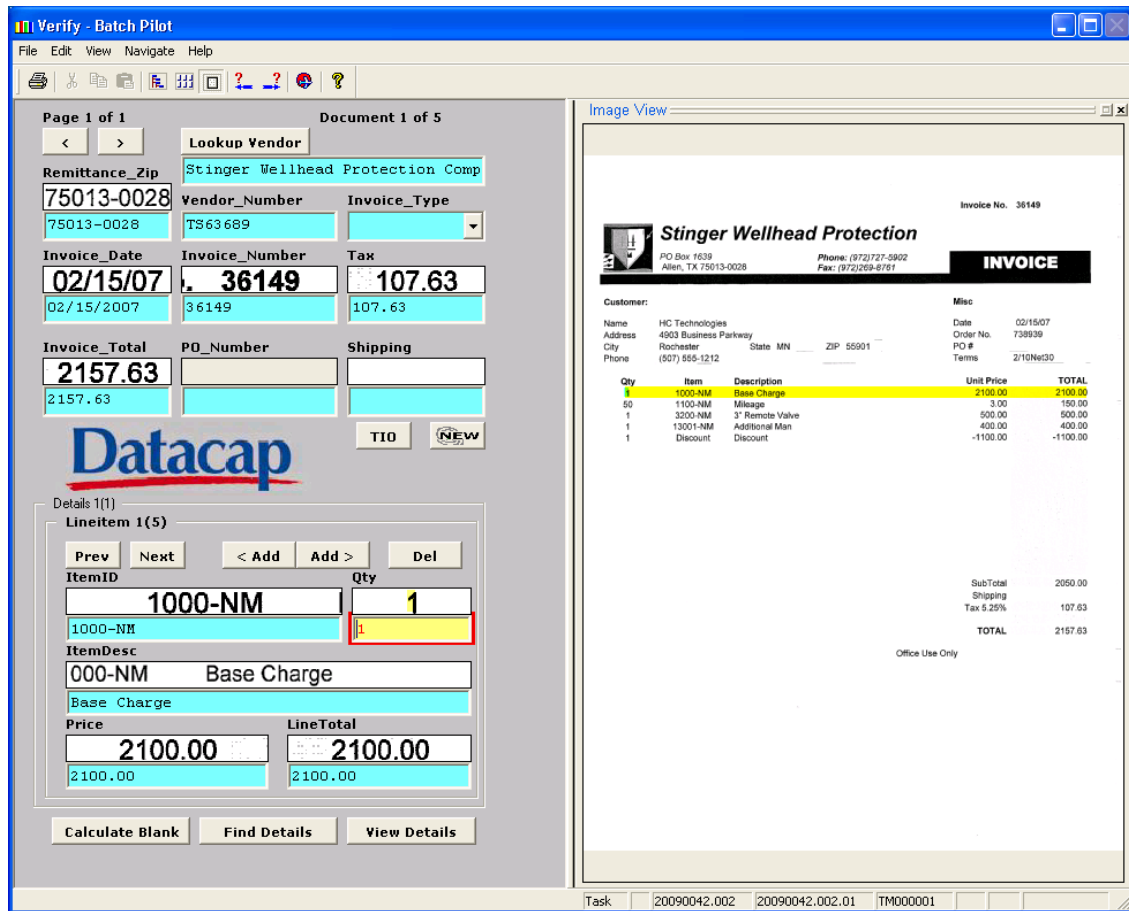
Note that for demonstration purposes only, all invoices are deliberately set to be displayed in the Verify window. In a production environment, you decide whether you want every invoice to be displayed to the Verify Operator, or only those invoices where recognition results are low confidence and data validation rules are violated.

The Verify window displays the first invoice in the batch and the details for the first line item on that invoice.

The left side of the window displays fields, recognized data, snippets, and a number of buttons, with invoice “header” information displayed on top, and line item detail on the bottom. The right side of the window displays the scanned invoice.



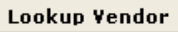
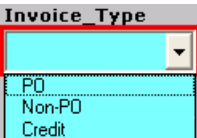



When there are errors or low confidence results, the cursor is placed in the first problem field and the field is outlined in red. In addition, the background color of a data field indicates:

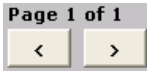


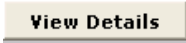



- Blue: No data validation errors or low confidence recognition results
- Yellow: Low confidence recognition results (low confidence characters are displayed in red)
- Red: Data validation error



The following tables describe some of the things you can do using buttons and hot-key combinations on the APT Verify window; for additional instructions on using the Verify window, see the section titled Verify Window Instructions starting on page 20.

To	Do this
Move to the next data field	Press <Tab>
Move to next low confidence character	Press <Alt+L>

To	Do this
Fill empty field with data using Click N Key	<p>Click in an empty data entry field, then do one of the following:</p> <p>Point at the field value on the document image and click it, or,</p> <p>Click and drag the mouse to draw a rectangular box around the existing field data on the image, or,</p> <p>Press and hold <Alt>, click and drag the mouse to draw a rectangular box that encompasses additional blank space (to leave room for additional characters), or,</p> <p>Press and hold <Shift>, click a field that has already been defined and drag the mouse to extend the field.</p>
Invoke validation rules for entire invoice	Press <Alt+V>
Delete the document that is currently displayed	Press <Alt+D>
Mark the document for review	Press <F2>
Display the next document in the batch	Press <Ctrl+Shift+N>
Display the previous document in the batch.	Press <Ctrl+Shift+P>
Move to the next problem document in the batch	<p>Press <Ctrl+N> or</p> <p>Click </p>
Move to the previous problem document in the batch	<p>Press <Ctrl+P> or</p> <p>Click </p>
Lookup and select vendor (either when blank or when incorrect vendor is displayed)	<p>Enter at least the first character of the vendor's name and the Remittance_Zip, then click </p>
Identify type of invoice	<p>Select from dropdown list</p> 
Display original version of scanned image (with lines, noise, etc.), display cleaned up version of image (toggles from TIO to TIF)	Click  or 
Create new fingerprint for this invoice	Click 

To	Do this
Display previous page of invoice, display next page of invoice	Click 
Display contents of previous line item, display contents of next line item	Click 
Add line before current (displayed) line, add line after current line	Click 
View all detail lines (opens separate window)	Click 
For all detail lines, locate all field values for all fields	Click 
Calculate missing numeric values using existing values and automatically fill blank numeric fields	Click 
Delete current (displayed) line	Click 
Display or hide the scanned image	On the View menu, select Image View, or press <Ctrl+Alt+I>
Move the image	Click and drag the image

The following table identifies the steps to take to process the sample invoices:

Vendor	Line Item	Issue	Do This
Stinger	1	QTY field is low confidence, but value is correct	<Tab> out <Alt+L>
	4	QTY field is low confidence, but value is correct	<Tab> out <Alt+L> Click Yes to validate and go to next page
Plunger	1 thru 5	No problems	<Alt+L> Click Yes to validate and go to next page
Business Stuff	header	Invoice Date is invalid	Change "29" to "28" <Tab> out <Alt+L>
	header	Tax amount is low confidence, but value is correct	<Tab> out <Alt+L>
	1	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	2	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L> Click Yes to validate and go to next page

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Vendor	Line Item	Issue	Do This
JWS Colorado	1 thru 7	No problems	<Alt+L> Click Yes to validate and go to next page
Stuart	2	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	4	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	8	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	8	LineTotal is low confidence but values are correct	<Tab> out <Alt+L> Click in LineTotal field <Alt+L>
	9	ItemID is low confidence and incorrect	Make corrections <Tab> out <Alt+L>
	9	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	10	ItemID is low confidence and incorrect	Make corrections <Tab> out <Alt+L>
	10	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	10	LineTotal is low confidence but values are correct	<Tab> out <Alt+L> Click in LineTotal field <Alt+L>
	11	LineTotal is low confidence but values are correct	<Tab> out <Alt+L> Click in LineTotal field <Alt+L>
	13	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	14	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	16	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
	17	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>
22	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L>	

Vendor	Line Item	Issue	Do This
	23	ItemDesc is low confidence but values are correct	<Tab> out <Alt+L> Click Yes to validate and go to next page

When you have finished processing the last invoice in the batch, a message box indicates that no additional problems were found. Click Yes to finish the batch and click OK again to complete the Verify processing.

Refresh the information displayed in the Job Monitor window by clicking the window's title bar and pressing F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *pending*.

Run Export Task (Background or Export Icon)

After running the Verify task, run the Export task by double-clicking the Export icon in the Operations window, or double-clicking the batch number of the batch you want to run in the Job Monitor window and clicking Yes in response to the prompt.

Export performs these important functions:

- Export saves information about unknown invoices that were successfully validated (creates new fingerprints) so that the next time Taskmaster APT “sees” the same invoice, it can identify the vendor and extract the field data using a process called Intellocate.
- Export outputs the field data to XML files. The XML files and the image files are now ready to be input into a back-end application.
- If you configured Taskmaster APT to send email notifications and then, during Verify, you marked an invoice for review or rescan, or deleted an invoice, Export also sends the appropriate emails with the marked or deleted image attached as a PDF file. If you did not configure email notifications, the PDFs of the marked or deleted images stay in the c:\Datacap\APT\batches\BatchID folder; the images and information about the images are not exported.

When Export completes, refresh the Job Monitor window. The status for this batch of invoices is now *Job Done*.

Verify Window Instructions

These instructions cover situations that are likely to occur during processing of invoices.

Note

These instructions use the following terms:

- **Matched/Unmatched** - Taskmaster APT's processing finds what it thinks is a match, this match may be correct or incorrect
- **Known/Unknown** - Taskmaster APT has or does not have the vendor in a lookup database; Taskmaster APT has or does not have a fingerprint for the invoice

Process Unknown Invoice for Known Vendor

This situation involves processing an unknown invoice for a known vendor. This can occur when a vendor has changed the layout of their invoices so much so that APT does not identify the invoice as belong to the vendor, or when an invoice is processed for a vendor who has just recently been added to the lookup database.

Symptom(s)

When APT processes the unknown invoice, the Vendor Name is blank.

Instructions

Process the invoice as a unknown invoice: Enter the first few letters of the vendor's name and the vendor's zip code, click Lookup Vendor, and populate the data fields using Click N Key, Find Details, etc. and press <Alt+V> to validate, and ensure the invoice data passes all validations. It is important to use Click N Key to populate the fields so that the data locations on the images can be stored as part of the fingerprint.

Identify Detail Lines on Unknown Invoice

This situation involves identifying where the first line item is located or where each of the fields in the line are located or what type of information they contain. This occurs on unknown invoices.

Symptom(s)

When an unknown invoice is processed, the Lineitem counter displays 0(0) - line 0 of 0.

Instructions

Click the Add> button to add an empty line, use Click N Key to identify where and each of the fields are in the first line, then click Find Details to locate the remaining lines. When the Lineitem counter displays an actual count, click View Details to review the data captured for all of the lines in a separate window. Close the window, and press <Alt+V> to validate, and ensure the invoice data passes all validations.

Process Multiple Unknown Invoices for Known Vendor in Single Batch

This situation involves processing multiple unknown invoices in a single batch for a known vendor. This can occur when a vendor has changed the layout of their invoices, or when

previously unprocessed invoices are processed for a vendor who has just been added to the lookup database.

Symptom(s)

When APT processes the first unknown invoice, the Vendor Name is blank.

Instructions

Process the invoice as a unknown invoice: Enter the first few letters of the vendor's name and the vendor's zip code, click Lookup Vendor, and populate the data fields using Click N Key, Find Details, etc. and press <Alt+V> to validate, and ensure the invoice data passes all validations. It is important to use Click N Key to populate the fields so that the data locations on the images can be stored as part of the fingerprint.

When the next invoice in that batch for that same vendor is displayed in the Verify window, APT matches it to the earlier invoice that passed validation, and displays a Sticky Fingerprint Available button above the Lookup Vendor button. Click the Sticky Fingerprint Available button to locate and populate the fields automatically.

Handle Unknown Invoice when Vendor is Unknown

This situation involves handling an unknown invoice for an unknown vendor. This can occur when your company is invoiced by a vendor before the vendor has been added to the lookup database.

Symptom(s)

When APT processes the invoice, the Vendor Name is blank, and when you click Lookup Vendor, the vendor is not listed.

Instructions

When Microsoft Outlook is installed on the Workstation and you updated the APT Settings.ini file with real email addresses, you can do one of the following that will route the invoice to a knowledge worker for handling:

- Mark the invoice for supervisor review - Press <F2>, enter relevant comments, then click OK. When Microsoft Outlook is installed on the Workstation, this invoice is not exported, rather, during the Export task, an email containing this invoice image is sent to the email address specified by the Review= parameter provided in the Settings.ini file.
- Delete the invoice from the batch - Press <Alt+D>. A message box is displayed, asking you to confirm that you want to delete the document. Click Yes. When Microsoft Outlook is installed on the Workstation, this invoice is not exported, rather, during the Export task, an email containing this invoice image is sent to the email address specified by the Delete= parameter provided in the Settings.ini file.

Otherwise, when Microsoft Outlook is not installed on the Workstation, you can:

- Put the entire batch on hold - On the File menu, select Quit Task and confirm you want to put the batch on hold.

Associate Vendor and Fingerprint

This situation involves correcting the association between a vendor and a fingerprint, and correcting the data when APT has matched an invoice with the wrong fingerprint. This can occur when two vendors use nearly identical invoice formats.

Symptom(s)

When APT processes the invoice, it displays the wrong vendor and the data fields are populated with incorrect data.

Instructions

Enter the first few letters of the vendor's name and the vendor's zip code, click Lookup Vendor, and select the correct vendor. Ensure all of the data fields are populated correctly using Click N Key, Find Details, etc. and press <Alt+V> to validate. Then click the New Fingerprint button. It is important to use Click N Key to populate the fields so that the data locations on the images can be stored as part of the fingerprint.

Capture Fields on Rotated Image

This situation involves processing an invoice that you rotated.

Symptom(s)

Click N Key no longer works.

Instructions

Manually key the data into the fields from the image and press <Alt+V> to validate. Even though the invoice passes all validations, a fingerprint is not automatically created by Taskmaster APT, and the next invoice from that vendor is treated as an unknown invoice.

Set Up Taskmaster APT to Process Your Invoice Images

You can easily test Taskmaster APT using your own invoice images.

The steps to do this include:

- 1 Back up, then delete the sample invoice images
- 2 Copy your images to the input folder
- 3 Add the vendors of those invoices to the Demo Vendor List (to simulate your vendor lookup database)
- 4 Run APT, and process each invoice

Back Up then Delete Sample Input Images

Open Windows Explorer, navigate to, and make a backup copy of the c:\Datacap\APT\images\Input folder, then delete the sample images in the Input folder.

(Note: If you skip this step, you can always retrieve the sample images from the installation media.)

Copy Your Images to Input Folder

Copy your own invoice images to the Taskmaster APT c:\Datacap\APT\images\Input folder.

Add Your Vendors to the Demo Vendor List

Open Windows Explorer, navigate to c:\Datacap\APT\process and double-click the Add Vendor Demo.exe file. The Add Demo Vendor window opens.

If vendor information is displayed for a vendor in the upper part of the window, click Clear.

For each of your vendors, enter a Vendor Name, a Vendor Zipcode, and either enter a Vendor Number or select the Generate Random option, then click Add. The vendor is added to the Demo Vendors list.

Close the Add Demo Vendor window when you have added the vendors associated with your invoice images.

Run Taskmaster APT

Follow the instructions in the section titled Using Taskmaster APT starting on page 11 to:

- Start Taskmaster APT
- Run VScan Task (Scan Icon)
- Run Batch Profiler Task (Background Icon)
- Run Verify Task (if you added all of your vendors to the Demo Vendor List, your invoices are processed as unknown invoices for known vendors)
- Run Export Task (Background or Export Icon)

Restore Taskmaster APT to Pre-Demo State

After you have given a demonstration of Taskmaster APT, you can restore it to an “out of the box” state so that you can give the demonstration again. Cleaning up between demonstrations enables you to control which invoices are processed as unknown, and lets you demonstrate how to process unknown invoices.

This process assumes you made a backup copy of the original sample images provided with Taskmaster APT.

The steps to do this include:

- Restore the original sample invoice images
- Delete at least one fingerprint to ensure one invoice is processed as an unknown invoice
- Run Taskmaster APT

Restore Sample Input Images

Open Windows Explorer, navigate to the c:\Datacap\APT\images\Input folder and delete any images that are not the original sample images.

Using Windows Explorer, navigate to and copy the original images from the backup folder to the c:\Datacap\APT\images\Input folder. (Reminder: Copies of the original images can be found on the installation media.)

Delete Taskmaster APT Fingerprints

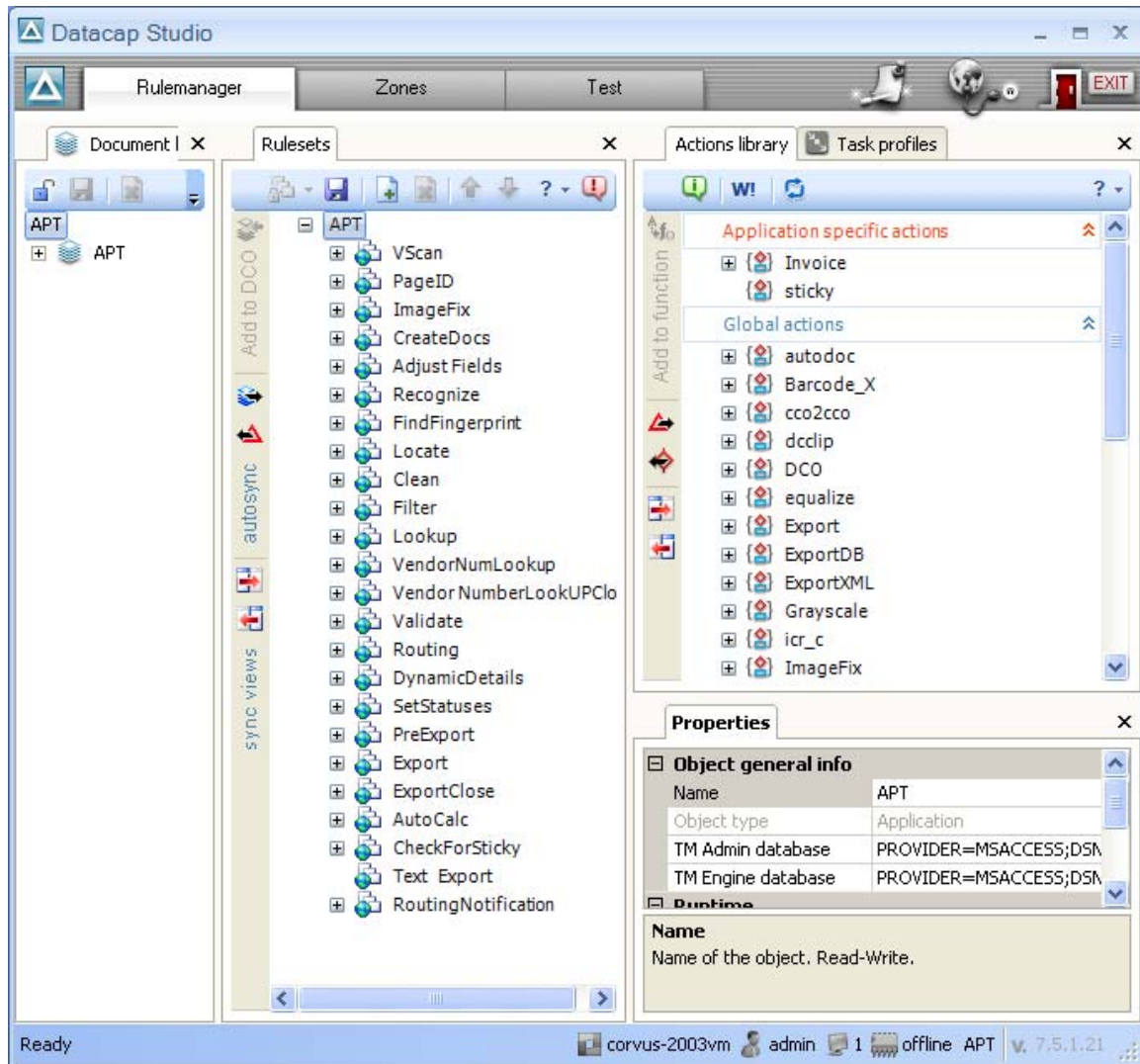
Taskmaster APT uses fingerprints for invoice identification. Normally you would let Taskmaster APT manage the fingerprints, however, to show in a demonstration how unknown invoices are processed, you must use Datacap Studio to delete one or more fingerprints. If you do not delete the fingerprints and give your demonstration a second time using the same invoices, the invoices are automatically identified and the fields automatically populated because of the existing fingerprints.

Start Datacap Studio

Datacap Studio is the application development tool for Taskmaster APT and you can use it to delete fingerprints.

- 1 Ensure Taskmaster Server Service is started (for instructions, see [Start Taskmaster Server Service](#) on page 9).
- 2 From your Windows Start menu, select All Programs, select Datacap, select Datacap Studio, and select Datacap Studio again. A Taskmaster Server dialog opens.
- 3 Enter or ensure the Server name or address is `127.0.0.1`, then click Next. A Connection progress bar is displayed briefly, then the Select Application – Rulerunner Service dialog opens.
- 4 Select the Work offline. Internal Rulerunner service option, then click Next. The Select Application – Applications dialog opens.
- 5 Select the APT application and click Next. A Connection Progress window is displayed briefly, then the Select Application – Taskmaster Login dialog opens.
- 6 Select the Taskmaster authentication option, and ensure User ID and Password are `admin`, and ensure the Station is set to `1`, then click Finish. The Datacap Studio main

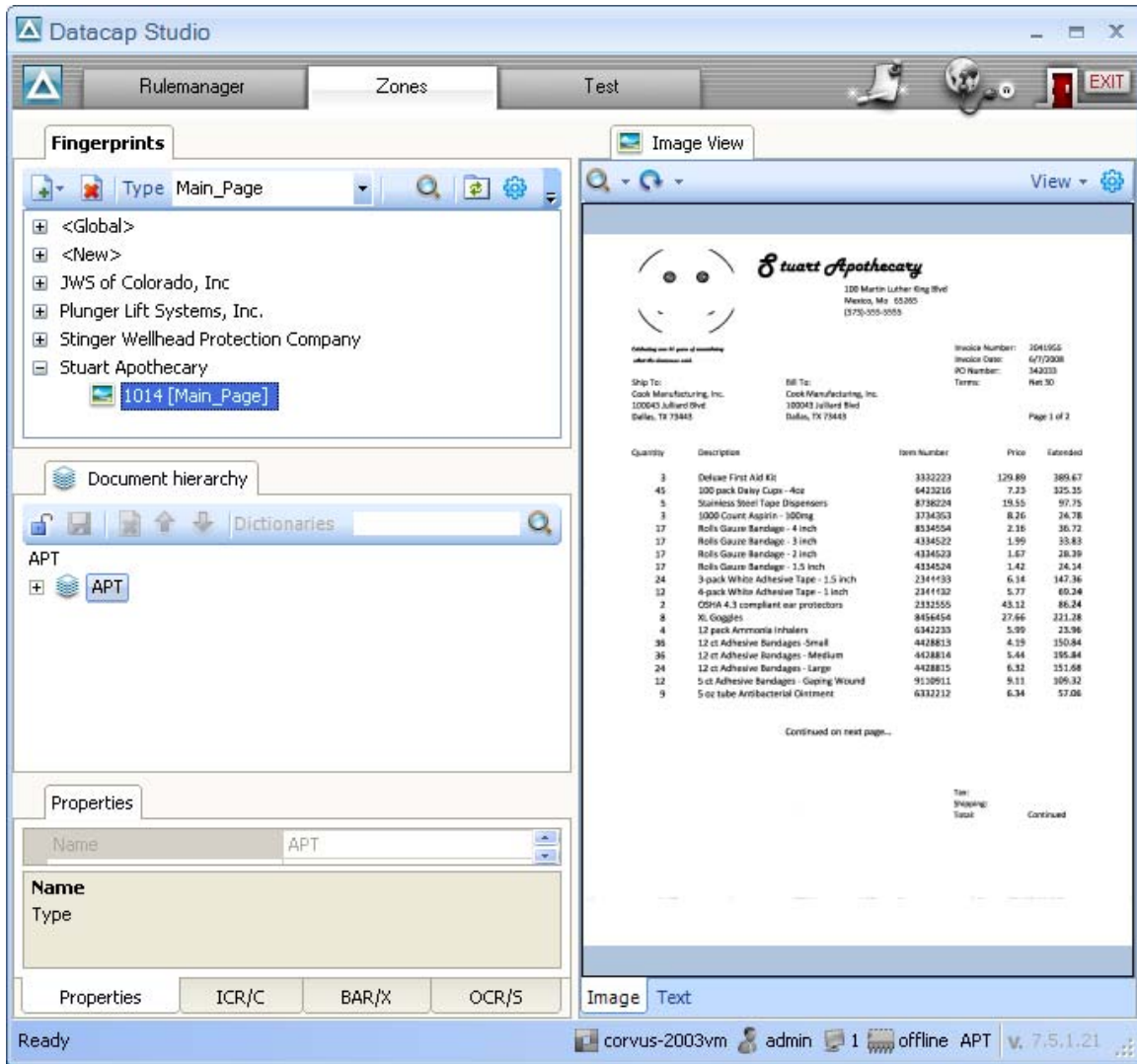
window opens with the Rulemanager tab displayed on top. What you see may be slightly different from this example:




- The Rulemanager tab is used to create and maintain Taskmaster applications.
- The Zones tab is used to view and maintain fingerprints and zones (the areas of the document containing field data).
- The Test tab is used to execute and test Taskmaster applications.


Delete Fingerprints

- 1 With Datacap Studio open, click the Zones tab to display it. What you see may be slightly different from this example:



The Fingerprints tab displays a list of all the Taskmaster APT vendor names associated with the fingerprints that exist. The <Global> and <New> entries are always present - do not attempt to delete them.

- 2 Click the plus sign (+) next to a vendor name to expand the list of fingerprints associated with that vendor.
- 3 Click one of the vendor's Main_Page entries. The image of the invoice is displayed on the Image View tab.
- 4 To delete a fingerprint, click the vendor's name to select it, and then click the Remove Selected  button on the Fingerprints tab. A Remove Class message box is displayed, asking you to confirm the deletion.
- 5 Click Yes. The fingerprint is immediately deleted, and the image is no longer displayed.
- 6 Repeat the previous two steps as many times as necessary to delete each of the fingerprints you want Taskmaster APT to process as unknown invoices.

- 7 Exit Datacap Studio by clicking the **Exit Door**  button.

Run Taskmaster APT

Follow the instructions in the section titled Using Taskmaster APT starting on page 11 to:

- Start Taskmaster APT
- Run VScan Task (Scan Icon)
- Run Batch Profiler Task (Background Icon)
- Run Verify Task (the invoices associated with the sample fingerprints you deleted are processed as unknown invoices for known vendors)
- Run Export Task (Background or Export Icon)