Datacap

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Taskmaster 7.6 Installation & Configuration Guide

January 2010

Datacap Inc.
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Tarrytown, NY 10591

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Chapter 1

Welcome

Welcome to Datacap Taskmaster 7.6 – and to the Taskmaster 7.6 Installation & Configuration Guide.

This Guide provides you with the information you need to install and configure all components of Taskmaster 7.6 in two configurations:

- Install, Configure, and Run on Single Vista Machine
- Install, Configure, and Run on Client and Server

This Welcome chapter describes the contents of the Taskmaster 7.6 Installation & Configuration Guide, and, lists contact information for Datacap and Datacap Support.

About this Book

The Taskmaster 7.6 Installation & Configuration Guide contains the following chapters.

Chapter 1: Welcome

Chapter 1 describes the contents of the Taskmaster 7.6 Installation & Configuration Guide.

Chapter 2: Installation and Configuration Prerequisites

Chapter 2 describes what you need **before** you begin the installation of Datacap Taskmaster 7.6 software. These prerequisites ensure that you can install, configure, and run the Taskmaster components of a sample application either on a single machine, or on multiple machines in a client/ server network configuration.

Chapter 3: Install, Configure, and Run on Single Vista Machine

Chapter 3 describes what you need to know to install all of the Taskmaster software components on a single Windows Vista machine (“Workstation”), perform a minimal amount of configuration, and run each of the Taskmaster software components "out of the box."

Chapter 4: Install, Configure, and Run on Client and Server

Chapter 4 describes what you need to know to install, configure, and run Datacap Taskmaster 7.6 server, web, and clients in a client/server, Windows desktop and/or web-based environment for development, test, and production purposes. It also includes instructions that guide you through using a sample application so you can see it process sample batches of documents.

The server ("Server") hosts the Taskmaster Server, the applications, batch files, and databases. For the Server, these instructions cover Windows Vista (which limits the number of users to five), Windows 2000, Windows 2003, and Windows 2008.

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The workstation ("Workstation") hosts the thick clients (Taskmaster Client, Report Viewer, Datacap Studio, etc.) and the browser. For the Workstation, these instructions cover Windows Vista.

An optional, separate server ("RRServer") hosts Rulerunner running as a web service. For RRServer, these instructions cover Windows 2003.

These instructions also include account settings for five types of users: Developers with administrative rights on both Server and Workstation, the Taskmaster Server Service, Taskmaster Client Service, Rulerunner running as a web service, and end users.

Chapter 5: Uninstall Taskmaster 7.6

This chapter provides the information you need to uninstall Taskmaster 7.6 software components.

Appendix A: Vista Machine Setup Checklist

This Appendix provides a summary of the account and configuration settings that are required to run Datacap Taskmaster 7.6 server, web, and clients on a single Windows Vista, IIS 7 machine with a single Domain/Windows user who has administrator rights on the machine.

Appendix B: Client/Server Setup Checklist

This Appendix provides a summary of the account and configuration settings that are required to run Datacap Taskmaster 7.6 server, web, and clients in a client/server, Windows desktop and/or web-based environment for development, test, and production purposes.

Appendix C: Taskmaster Installer Command Line Parameters

This Appendix provides information about the most commonly used parameters available when running the Taskmaster InstallShield Setup.exe from the command line.

If You Need Help

Telephone number for Datacap Inc.'s Technical Support:

☎ 914-259-1300

Fax number for Datacap Inc.'s Technical Support:

☎ 914-366-0500

Email address for Datacap Inc.'s Technical Support:

✉ support@datacap.com

Web address for Datacap Inc.'s Technical Support:

http://support.datacap.com

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Chapter 2

Installation & Configuration Prerequisites

This chapter of the Taskmaster 7.6 Installation & Configuration Guide provides the information you need **before** you begin the installation of Datacap Taskmaster 7.6 software. These prerequisites ensure that you can install, configure, and run each Taskmaster component of a sample application either on a single machine, or on multiple machines in a client/server network configuration.

Configuration Assumptions

For information on hardware and operating system requirements for Datacap Taskmaster software, see:

http://dnld.datacap.com/TechNotes/hardware.htm

To keep things simple, instructions are provided for two configurations:

- **Chapter 3 Install, Configure, and Run on Single Vista Machine** - These instructions allow you to install, configure, and run all of the Taskmaster components on a single Microsoft Windows Vista machine. This machine is referred to as the "Workstation." The instructions assume your Windows user account has administrator rights on the Workstation. For a checklist of the account and configuration settings, see **Appendix A Vista Machine Setup Checklist**.
- **Chapter 4 Install, Configure, and Run on Client and Server** - These instructions allow you to install, configure, and run Datacap Taskmaster 7.6 server, web, and clients in a client/server, Windows desktop and/or web-based environment for development, test, and production purposes. The server ("Server") hosts the Taskmaster Server, the applications, batch files, and databases; the instructions cover Vista (which limits the number of users to five), as well as Windows 2000, Windows 2003, and Windows 2008. The workstation ("Workstation") hosts the thick clients (Taskmaster Client, Report Viewer, Datacap Studio, etc.) and the browser; these instructions cover Vista. The instructions assume your user account has administrator rights on the Workstation and Server, and that you will create domain accounts for the developer, Taskmaster Server Service, the Taskmaster Client Service, Rulerunner running as a web service, and end users. For a checklist of the account and configuration settings, see **Appendix B Client/Server Setup Checklist**.

Before You Begin

Before beginning the installation, ensure you have done the following:

- Make a note of and shut down Taskmaster software
- Backup and uninstall Taskmaster Versions 7.1 and 7.1 SP1
- Backup Taskmaster Version 7.5 or 7.5 SP1

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- Ensure scanner is set up and works
- Ensure domain accounts exist
- Ensure IIS is installed on Vista and Windows 2008 Servers
- Confirm IIS Configuration on Windows 2000, Windows 2003 Servers
- Obtain the default Taskmaster administrative user ID and password

Make a Note of and Shut Down Taskmaster Software

Before beginning the installation, we recommend shutting down all Taskmaster software on the machine, and if the machine is part of a Taskmaster network configuration, on all machines in the following sequence:

1 Taskmaster Client software for all applications (including Taskmaster Client, Taskmaster Web Client, Taskmaster Client Service, Datacap Studio, Batch Pilot, Report Viewer, etc.)

2 Taskmaster Web and any Taskmaster Web Services (WRRS, Fingerprint Service, etc.)

3 Taskmaster Server Service

Backup and Uninstall Taskmaster Versions 7.1 and 7.1 SP1

When either Taskmaster version 7.1 or version 7.1 SP1 exists on a machine on which you want to install Taskmaster 7.6, you must correctly and completely uninstall the earlier version before you install Taskmaster 7.6.

WARNING

Uninstalling Taskmaster version 7.1 or version 7.1 SP1 must be performed using the Windows Add or Remove Programs tool in a specific sequence:
1 Uninstall Datacap Taskmaster
2 Reboot the machine
3 Uninstall Datacap CD

1 Before you begin, ensure you have shut down all software (in addition to the Taskmaster software) on the machine.

2 Copy the entire shared Datacap folder, including your application's process folder, to a backup location.

3 From the Windows Start menu, select Settings, select Control Panel, and double-click Add or Remove Programs. When the Add or Remove Programs window opens, scroll down and select Datacap Taskmaster.

4 Click Change/Remove. The Preparing to Install window is displayed, followed by the Welcome window.

5 Select the Remove option, then click Next. A Confirm Uninstall message box is displayed.

6 Click OK. The message box closes and the Setup Status window displays a progress bar for various removal and unregistration activities, followed by the InstallShield Wizard Complete window. The Yes I want to restart my computer now option is selected.

7 Click Finish. The window closes, and the machine reboots.

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8 When the machine has restarted, log on again.

9 From the Windows Start menu, select Settings, select Control Panel, and double-click Add or Remove Programs. When the Add or Remove Programs window opens, scroll down and select Datacap CD.

10 Click Change/Remove. A message box prompts you to confirm you want to remove Datacap from your computer.

11 Click Yes. The message box is closes and the Setup Status window displays a progress bar for various removal and unregistration activities, followed by a message box confirming that Datacap has been uninstalled successfully.

Back Up Taskmaster Version 7.5 or 7.5 SP1

When Taskmaster version 7.5 or 7.5 SP1 exists on a machine on which you will install Taskmaster 7.6, while there is no need to remove it before you install Taskmaster 7.6 (as the 7.6 installation process will uninstall it automatically), you should copy the entire shared Datacap folder, including your application's process folder, to a backup location. This ensures you have a backup copy of your customized applications and all separately purchased Datacap options.

Ensure Scanner is Set Up and Works

Follow the manufacturer's instructions to attach the scanner to the Workstation, and install and configure the required scanner software. Be sure you can scan successfully using the scanner using any image capture software product. If you cannot scan documents outside of Taskmaster, you will not be able to scan documents using Taskmaster.

Note: A physical scanner is not required for running the Datacap foundation or sample applications, as those applications can process the prescanned images included during installation.

Ensure Domain/Windows Accounts Exist

When installing all Taskmaster components on a single Vista machine, the Windows accounts you need are local users that are usually found on a Vista workstation: the developer's/your own Windows user ID, and the NETWORK SERVICE and IUSR local users. At a minimum, the developer's/your Windows User ID must have Administrator rights to the Workstation.

When installing on a client workstation and one or more servers, the Workstation and Server must be in the same domain and the domain must also include accounts for the Taskmaster Server Service, the Taskmaster Client Service, and any developers and end users who you want to be able to use Taskmaster. The developer's/your Windows User ID must have Administrator rights to the Workstation and the Server.

In addition, ensure that the Taskmaster Server Service and the Taskmaster Client Service have been granted the Log on as a Service right on the primary domain controller.

Microsoft MSXML 6.0 Parser

Datacap software requires the Microsoft MSXML 6.0 Parser and if it isn't already installed, it will be installed automatically during the Datacap software installation process.

Microsoft Windows Installer 3.1

Datacap software also requires the Microsoft Windows Installer 3.1. If it isn't already installed, it will be installed automatically during the Datacap software installation process.

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Microsoft .NET Framework 2.0

Servers and Workstations running Datacap software require Microsoft .NET Framework 2.0, and if it is not already installed, it will be installed automatically during the Datacap software installation process.

Microsoft Internet Information Services

Servers running Taskmaster Web require Microsoft Internet Information Services (IIS).

Ensure IIS is Installed on Vista and Windows 2008 Servers

You must install Internet Information Services if was not installed when your Vista or Windows 2008 operating system was installed, and we recommend installing all IIS components.

On Vista:

1 From the Server's Windows Start menu, select Control Panel, select Programs and Features, and then click Turn Windows Features on or off.

2 Expand and select Internet Information Services, then ensure all components and subcomponents are selected.

On Windows 2008:

1 From the Server's Windows Start menu, select Administrative Tools, and then click Server Manager.

2 In the Server Manager hierarchy pane, expand Roles, and then select Web Server (IIS).

3 Ensure all Web Server components and subcomponents are selected.

Confirm IIS Configuration on Windows 2000, Windows 2003 Servers

Confirm that IIS was installed properly on your Windows 2000, or Windows 2003 Server.

IMPORTANT NOTE

On Windows 2000 and Windows 2003 Servers, IIS should be installed prior to .NET. If IIS is installed after .NET, you must run Microsoft's ASP.NET IIS Registration Tool (aspnet_regiis.exe) with the installation parameter (-i) to update the ASP.NET application script maps to point to the appropriate ASP.NET ISAPI version. For instructions on running the tool, see Run aspnet_regiis.exe. For more information about the tool, search for "aspnet_regiis.exe" on the Microsoft website.

Determine if IIS and .NET are installed

This procedure provides instructions on how to determine whether IIS and .NET are already installed on the Workstation or Server:

1 When your operating system is Vista, skip this step, as.NET is included with Vista. From the Windows Start menu, select Settings, select Control Panel, and double-click Add or Remove Programs. When the Add or Remove Programs window opens, scroll down to determine whether Microsoft .NET Framework 2.0 is installed, then close the window.

2 In Control Panel, select Administrative Tools and determine whether there is an entry for Internet Information Services displayed.

3 If:

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- Neither .NET nor IIS is displayed, install IIS, then continue with the Taskmaster installation process
- Both .NET and IIS are displayed, and your operating system is Windows 2000, or Windows 2003, run aspnet_regiis.exe, then continue with the Taskmaster installation process
- Only IIS is displayed, continue with the Taskmaster installation process
- Only .NET is displayed, install IIS, then run aspnet_regiis.exe, then continue with the Taskmaster installation process

Run aspnet_regiis.exe

This procedure provides instructions on how to run Microsoft's aspnet_regiis.exe to update the ASP.NET application script maps to point to the appropriate ASP.NET ISAPI version.

1. From the Windows Start menu, select Run. The Run dialog opens.
2. In the Open field, type cmd, and click OK. A DOS command prompt window opens.
3. Locate the aspnet_regiis.exe (for example, from your C:\> prompt, type: dir aspnet_regiis.exe /s)
4. Run the aspnet_regiis.exe with the -i parameter (for example: C:\>C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe -i) Progress messages are displayed indicating the start and completion of the installation.
5. When the installation has finished, exit/close the DOS window.

Obtain the Default Taskmaster Administrative User ID and Password

You need the default administrator User ID and password to log into the Taskmaster software. Contact your Datacap Implementation Specialist or Support for the administrative User ID password.

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Chapter 3

Install, Configure, and Run on Single Vista Machine

This chapter provides the information you need to install all of the Taskmaster software components on a single Windows Vista machine (“Workstation”), perform a minimal amount of configuration, and run each of the Taskmaster software components "out of the box" including:

- Taskmaster Server Service
- APT Taskmaster Client processing
- APT Taskmaster Client Report Viewer
- Taskmaster Web
- APT Taskmaster Web Client processing
- APT Taskmaster Web Client report generation
- Datacap Studio

The sections are sequenced deliberately, as some items in later sections depend on steps from the previous sections having been completed successfully.

For a checklist of the account and configuration settings, see **Appendix A Vista Machine Setup Checklist.**

WARNINGS

The steps for installing and configuring on more than one machine are significantly different than the steps for installing on a single machine. For information on how to install Taskmaster components on separate machines in a client/server environment, see Chapter 4 Install, Configure, and Run on Client and Server.

While the installation package (Setup.exe) can be located anywhere (for example, on an accessible network drive, on the CD in the Workstation's CD/DVD drive), the destination of the installed software must be on a physical hard drive of the machine from which you run the Setup.exe.

Your initial Taskmaster software installation must be into the c:\Datacap folder on the Workstation. If you do not use this installation path, the foundation (APT, Flex) and sample (Survey, Express) applications will not function.

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Overview of Taskmaster Installation on Single Windows Vista Machine

The Taskmaster installation, configuration, and run processes are performed in the following sequence:

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Run the Taskmaster InstallShield Wizard and install all of the Taskmaster software components on the Workstation.

3 Reboot the Workstation.

4 Configure Taskmaster components on the Workstation.

5 Run Taskmaster Client.

6 Configure Taskmaster Web.

7 Configure Internet Explorer.

8 Run Taskmaster Web Client.

9 Run Datacap Studio.

Installation Instructions for Single Vista Machine

This section provides the information you need to install all of the Taskmaster software components on the Workstation.

Ensure Prerequisites are Met

Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

Install All Taskmaster Components on Single Vista Machine

This procedure provides instructions on how to run the Taskmaster InstallShield Wizard to install all components on a single Windows Vista machine (referred to as "Workstation").

WARNINGS

The steps for installing and configuring on more than one machine are significantly different than the steps for installing on a single machine. For information on how to install on a workstation and a server, see Chapter 4 Install, Configure, and Run on Client and Server.

While the installation package (Setup.exe) can be located anywhere (for example, on an accessible network drive, in the Workstation's CD/DVD drive), the destination of the installed software must be on a physical hard drive of the machine from which you run the Setup.exe.

Your initial Taskmaster software installation must be into the c:\Datacap folder on the Workstation. If you do not use this installation path, the foundation (APT, Flex) and sample (Survey, Express) applications will not function.

1 Make the installation package available on your network, or insert the Taskmaster CD in the Workstation’s CD/DVD drive. If the installation process does not start automatically, or if the package is on the network, open Windows Explorer, navigate to

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and double-click the Setup.exe.
When UAC is on, the User Account Control window opens. Click Allow.
The Taskmaster Setup InstallShield Wizard opens.

2 The InstallShield Wizard displays a Preparing to Install... window followed by the InstallShield Wizard Welcome window.

3 Click Next. The License Agreement window opens.

4 Click I accept the terms in the license agreement and click Next. The Setup Type window is displayed with the Complete option selected.

5 Click Next. The Ready to Install the Program window is displayed.

6 Click Install. The Installation Wizard displays progress messages and a progress indicator, and when complete, displays the InstallShield Wizard Complete window.

7 Click Finish. A prompt to reboot your machine is displayed.

8 Depending on whether you need to save and close other applications before you reboot your system, click either No or Yes. The message box closes.

Reboot after Install

After completing the Taskmaster Installation process, reboot the machine.

Using Taskmaster APT

This section provides the information you need to process the sample (pre-scanned) images included with Taskmaster 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 computer.

For information on how to process your own pre-scanned invoice images through APT, see the instructions in the Taskmaster APT Quick Start Guide, in the section titled: Set Up Taskmaster APT to Process Your Invoice Images.

Run APT Taskmaster Client Application

This section provides the information you need to run the Datacap Taskmaster foundation APT application "out of the box." These instructions involve starting the Taskmaster Server Service, starting the APT Taskmaster Client application, and running the default APT tasks to process sample, pre-scanned images.

Instructions for running the default APT Taskmaster Web Client tasks are provided after the Configure Taskmaster Web on Vista, Windows 2008, IIS 7 Server instructions.

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

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- 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 and Web Demo jobs are the examples used in this documentation**.** When running the Demo jobs, 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.
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.)

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install all of the components on a single Workstation on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

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Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
   When UAC is on, the User Account Control window is displayed - click Allow.
   The TMS Configuration window opens.
2. When the Status:
   - Shows as Running, continue with the next step.
   - Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.
3. Close the TMS Configuration window.

Start APT Taskmaster Client for the First Time (Vista)

This procedure provides instructions on how to start the APT Taskmaster Client application on the Workstation for the first time when the Workstation's operating system is Vista. Note that after the first time you log into the Taskmaster Client, it remembers and displays what you entered the previous time.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon. The Select Taskmaster Server dialog opens with a blank Server name (address) field.
2. Enter the default IP address of 127.0.0.1 and click OK. A Station ID is missing in the profile message is displayed.
3. Click OK. An invalid login name or password message is displayed.
4. Click OK. The Please login window opens with your Window User ID and the name of your computer displayed.
5. Replace your Windows User ID with admin, use the password provided by Datacap, and replace your computer name with the number 1, then click OK. The APT Taskmaster Client main window opens with the Operations pane displayed.

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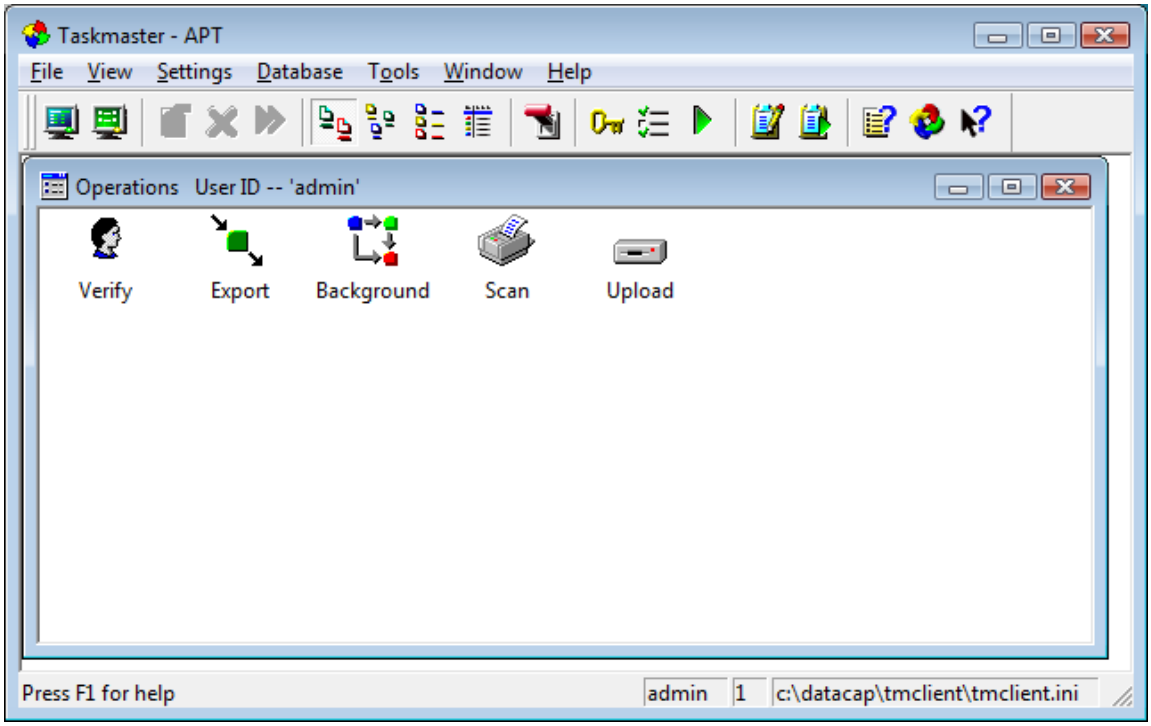
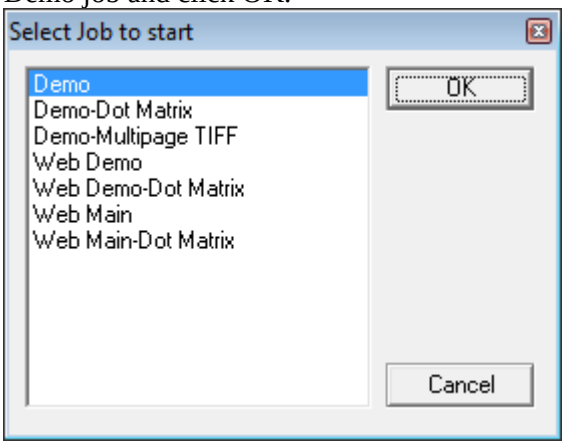


Run APT Taskmaster Client VScan Task (Scan Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client VScan task to process pre-scanned images.

1 On the Workstation, in the Operations pane, double-click the Scan shortcut, select the Demo job and click OK.



A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. A message box is displayed indicating the task has finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the VScan task finishes successfully, APT has picked up the images from the \APT\images\Input folder and created a Taskmaster "batch," which is a collection of document images to be processed. Taskmaster has assigned a batch ID and created a uniquely-numbered folder with the name of the batch ID in \APT\batches. This folder

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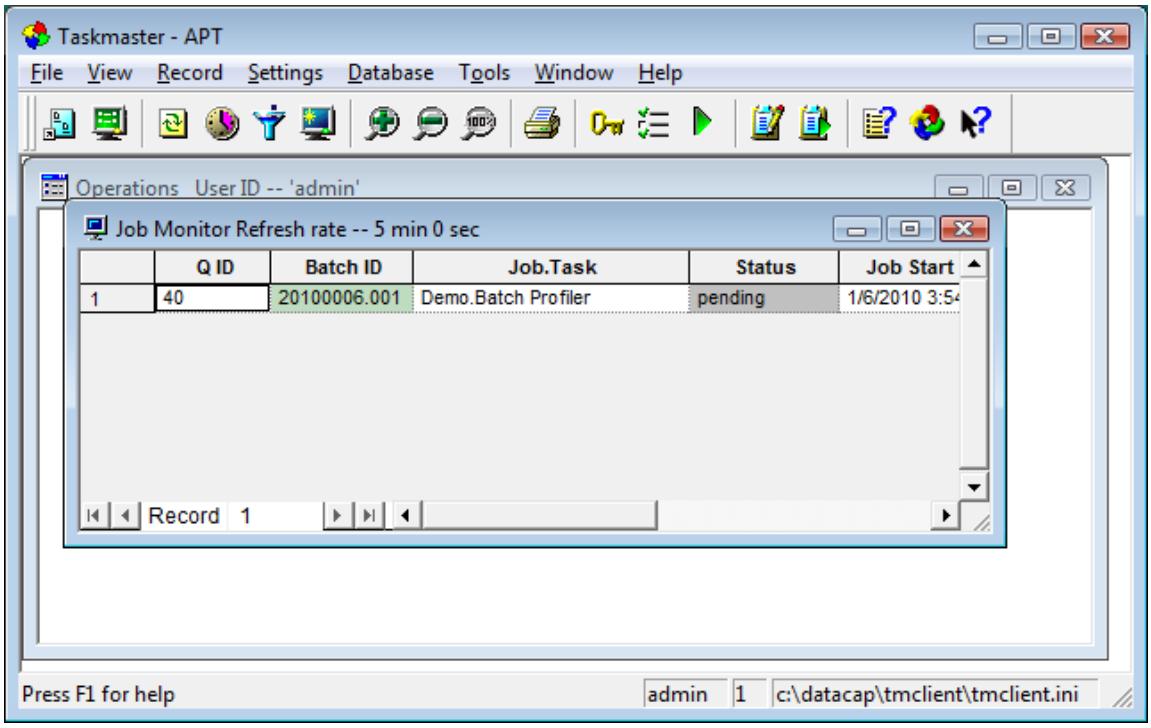
holds all of the document image processing results for this batch of invoices, including the newly-created rrsvscan.xml file.

4 To view information about the batch, click the View menu and select *Job Monitor* to open the Job Monitor window.

5 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Batch Profiler* and *pending*.



Run APT Taskmaster Client Batch Profiler Task (Background Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Batch Profiler task.

1 On the Workstation, in the Operations pane, double-click the Background shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. 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.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Batch Profiler task finishes successfully, the images have been organized into documents, copies (TIO) have been made of the original images, fingerprint (CCO) and page XML files have been created, along with a BatchProfiler.xml file in the batch's uniquely-numbered folder in \APT\batches.

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Verify* and *pending*.

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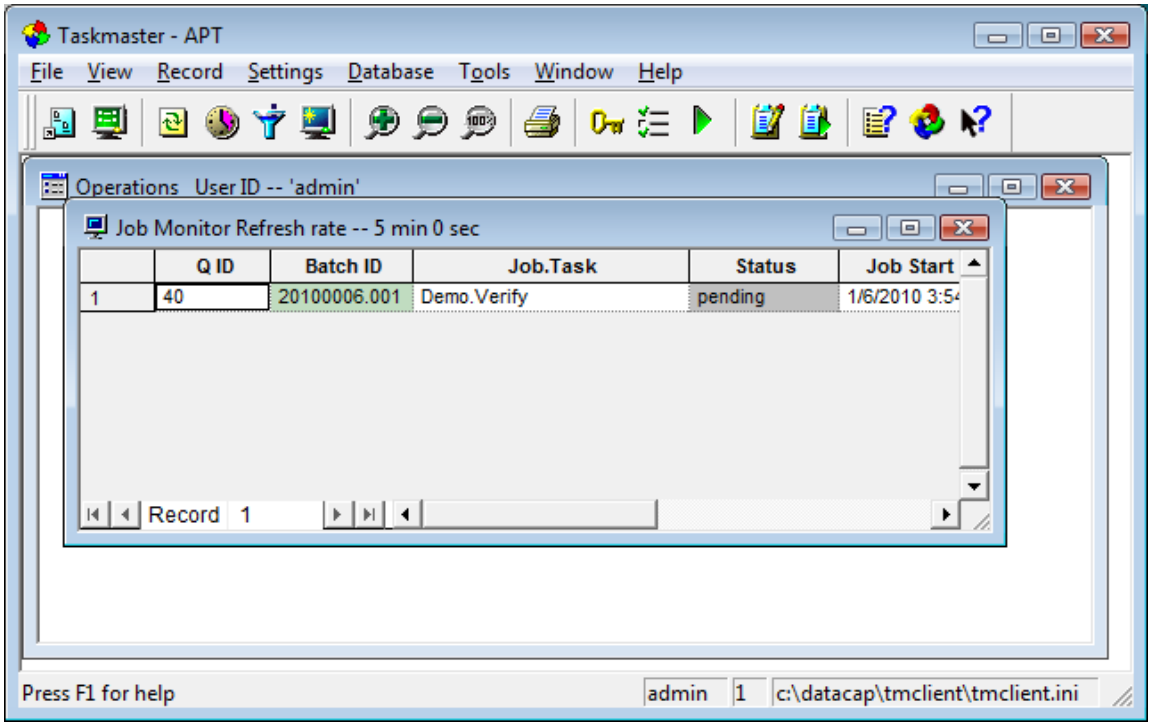

Run APT Taskmaster Client Verify Task (Verify Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Verify task.

1 On the Workstation, in the Operations pane, double-click the Verify shortcut. A Task Monitor window opens and a Rulerunner window opens, then the Verify - Batch Pilot window opens.

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

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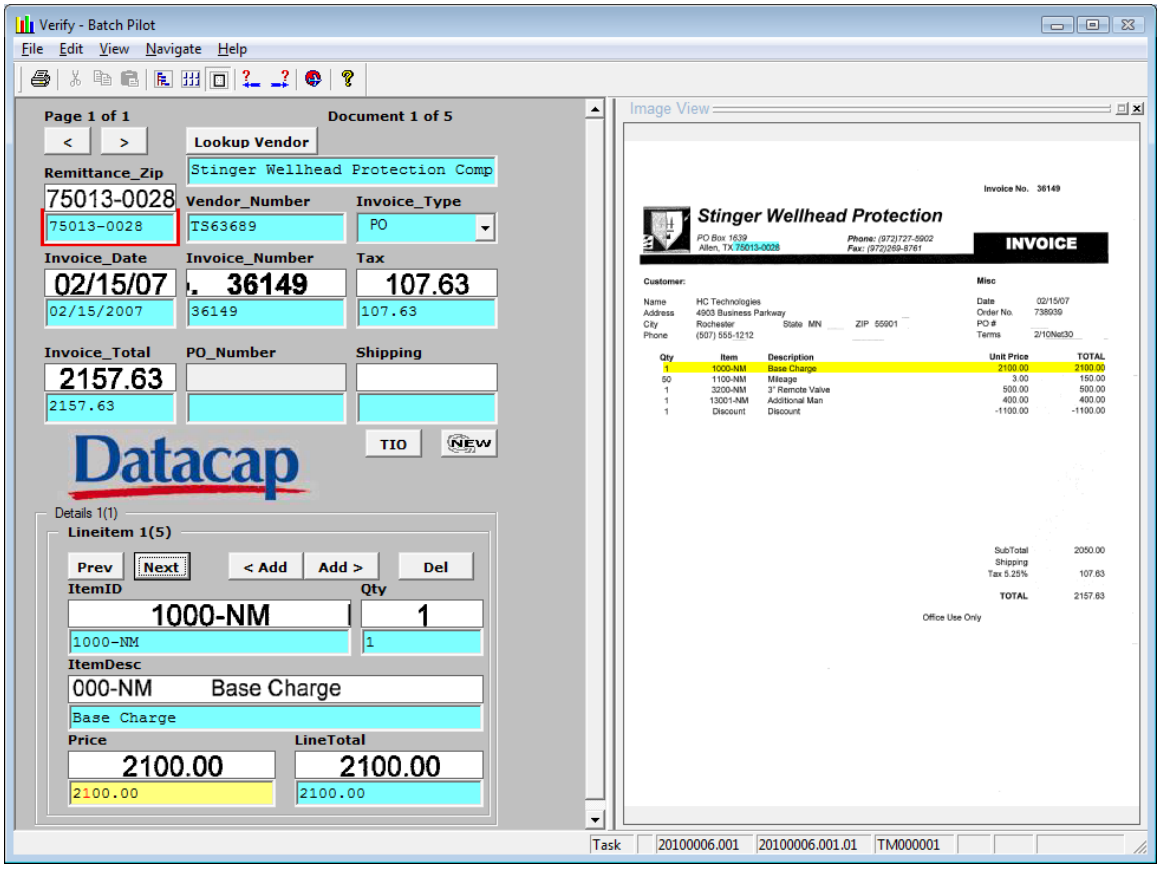

2 The following table describes some of the things you can do using buttons and hot-key combinations on the APT Verify window; for additional instructions on using the Verify window, see the section in the Taskmaster APT Quick Start Guide titled: Verify Window Instructions.

To	Do this
Move to the next data field	Press <Tab>
Move to next low confidence character	Press <Alt+L>
Fill empty field with data using Click N Key	Click in an empty data entry field, then do one of the following: Point at the field value on the document image and click it, or, Click and drag the mouse to draw a rectangular box around the existing field data on the image, or, 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, Press and hold <Shift>, click a field that has already been defined and drag the mouse to extend the field.
Invoke validation rules for entire invoice	Press <Alt+V>

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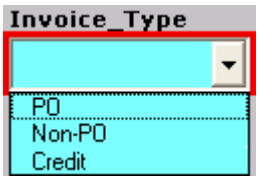
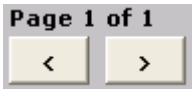
To	Do this
Delete the document that is currently displayed	Press <Alt+D>
Mark the document for review	Press <F2>
Display the next document in the batch	Press <Ctrl+Shift+N>
Display the previous document in the batch.	Press <Ctrl+Shift+P>
Move to the next problem document in the batch	Press <Ctrl+N> or Click
Move to the previous problem document in the batch	Press <Ctrl+P> or Click
Lookup and select vendor (either when blank or when incorrect vendor is displayed)	Enter at least the first character of the vendor's name and the Remittance_Zip, then click
Identify type of invoice	Select from dropdown list 
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
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

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To	Do this
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

3 Using <Tab>, <Alt+L>, <Alt+V>and other keys described above, review and validate each sample document. When the data has been validated, an End of Page Reached message will be displayed.

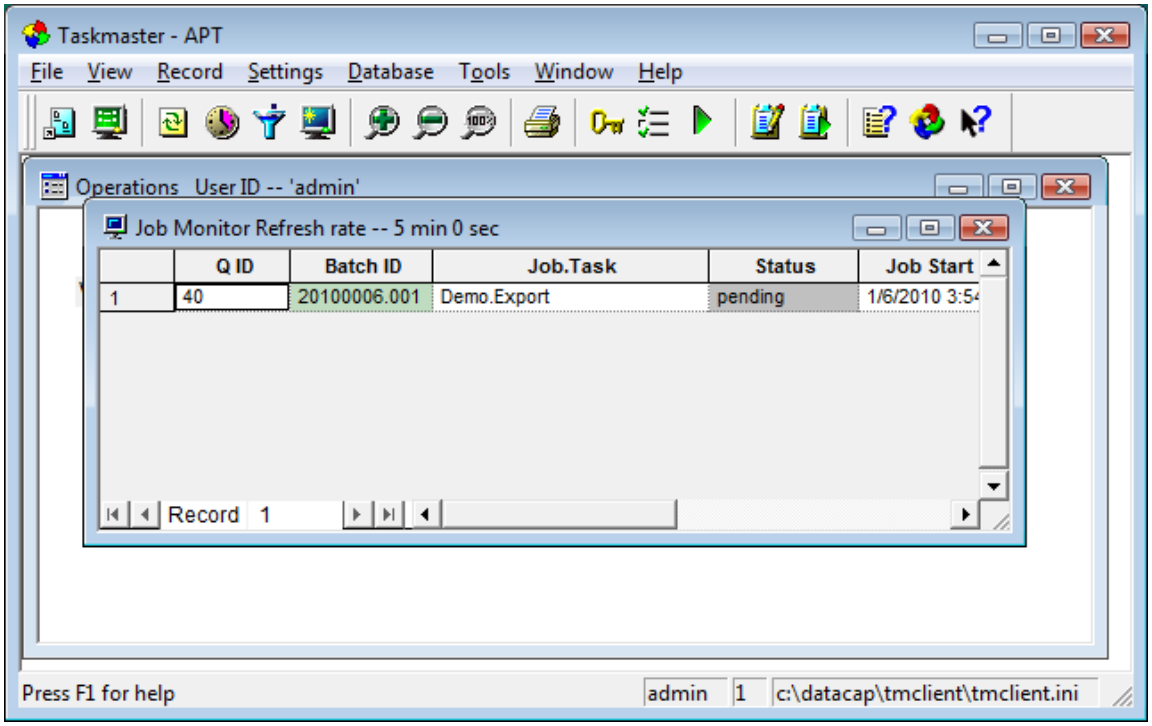
4 Click Yes to go to the next document. When you have finished processing the last invoice in the batch, a message box indicates that no additional problems were found.

5 Click Yes to finish the batch. A message box is displayed indicating the task has finished.

6 Click OK. A message box asks if you want to continue processing.

7 Click No. The message box closes and the Operations pane is redisplayed. When the Verify task finishes successfully, page XML files have been updated (for example, when low confidence characters have been changed during Verify), and a Verify.xml file has been created in the batch's uniquely-numbered folder in \APT\batches.

8 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *pending*.



Run APT Taskmaster Client Export Task (Export Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Export task.

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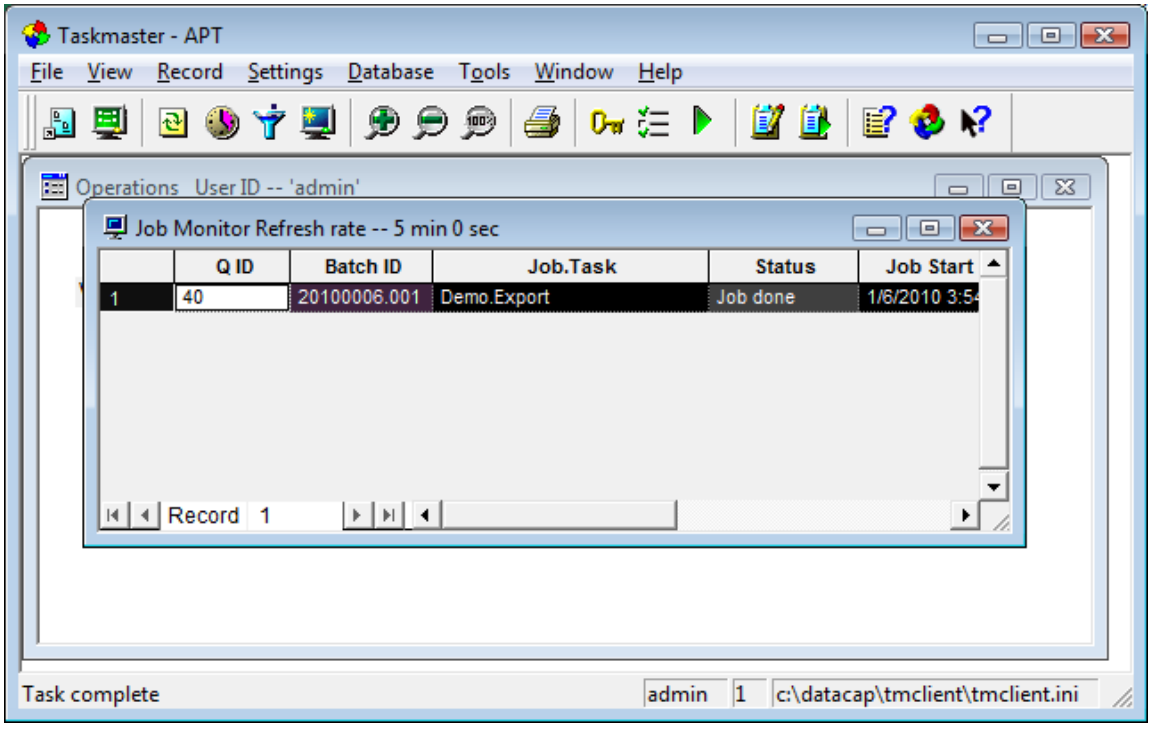
1 On the Workstation, in the Operations pane, double-click the Export shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. A message box is displayed indicating that the Export task finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Export task finishes successfully:

- 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.
- An Export XML file has been added to the batch's uniquely-numbered folder found in \APT\batches.
- 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 batch's uniquely-numbered folder in \APT\batches; the images and information about the images are not exported.

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *Job Done*.



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Generate APT Taskmaster Client Reports Manually

This section provides the information you need to run the sample APT Taskmaster Client reports.

Overview of APT Taskmaster Client Report Viewer

The APT Taskmaster Client Report Viewer is a separate utility program that can produce a set of standard reports "out of the box." The Report Viewer is installed when you install the Taskmaster Client software. A shortcut is automatically created on your Windows Start menu by the installation process.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install all of the components on a single machine on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

4 Ensure the Taskmaster Server Service is started.

5 To view actual data on one or more reports, run one or more of the APT Taskmaster Client or Taskmaster Web Client tasks.

Start APT Taskmaster Client Report Viewer

This procedure provides instructions on how to start up the APT Taskmaster Client Report Viewer. Exit the Taskmaster Client on the Workstation before starting Report Viewer on that Workstation.

Note that after the first time you log into Report Viewer, it remembers and displays what you entered the previous time.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Report Viewer icon. A Select Taskmaster Server dialog opens.

2 Enter or ensure the Server name (address) is 127.0.0.1, then click OK. The Report Viewer Login window is displayed.

3 Enter User Name of admin, enter the password provided by Datacap, and ensure the Station ID is set to 1, then click OK. The Report Viewer main window opens.

Create APT Taskmaster Client Reports Manually

This procedure provides instructions on how to create a APT Taskmaster Client report manually.

1 With the Report Viewer main window open, on the Report menu, select Open. The Open Report dialog is displayed.

2 In the:

- Date portion of the dialog, make changes to indicate the time period to be included on the report
- Report portion of the dialog, select the report you want to view

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- Filters portion of the dialog, select a filter (optional)

then click Open. The report is displayed.

3 Use the buttons and fields on the report toolbar as follows:

To	Do This
Set up the printer on which you want to print your reports	1 On the Report menu, click Print Report. The Print Setup window opens. 2 Clear the No Printer checkbox and select the printer you want to use from the drop-down list and adjust the other Windows Print controls as appropriate. 3 Click OK. The Windows Print window opens. 4 Click Cancel. The Windows Print window closes. 5 On the Report menu, click Close. The report window closes.
Export data to PDF file (You must have an Adobe Acrobat printer driver installed to "print" the report to a PDF file)	1 On the Report menu, click Print Report. The Print Setup window opens. 2 If necessary, clear the No Printer checkbox and select the Adobe Acrobat printer driver from the drop-down list and adjust the other Windows Print controls as appropriate. 3 Click OK. The report pages are printed to a PDF file. 4 Depending on your Adobe Acrobat settings, the PDF file may open automatically. 5 On the Report menu, click Close. The report window closes.
Print report	1 Click Print. The Windows Print window opens. 2 Adjust the Windows Print controls as appropriate, then click OK to print the report pages. 3 On the Report menu, click Close. The report window closes.
Refresh the contents of the report	Click Refresh.
Show or Hide Group Tree	Click Toggle Group Tree.
Resize (enlarge or shrink) the report	Select the appropriate percentage from the drop-down list.
Display first page	Click Go to First Page.

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To	Do This
Display previous page	Click Go to Previous Page.
Display specific page	Enter a page number then press <ENTER>.
Display next page	Click Go to Next Page.
Display last page	Click Go to Last Page.
Search for a string on the report	1 Click Search Text. The Search dialog opens. 2 Enter the string you want to search for, then click Find Next. The string is highlighted on the report. 3 To close the Search dialog, click Cancel. The Search dialog closes.
Close report	On the Report menu, click Close. The report window closes.

4 Close the Report Viewer window.

Review Default Installation Results

This section is optional. The instructions provided allow you to review the Taskmaster Client database connections, and groups, users, and stations installed by the default installation process.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install all of the components on a single machine on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

View Default Database Connections (Vista)

When you perform the default Datacap Taskmaster installation, it automatically sets up Microsoft Access databases and ODBC connections for the default Datacap Taskmaster foundation and sample application databases.

This procedure provides instructions on how to view the ODBC connections that were set up automatically by the installation process.

1 From the Workstation's Windows Start menu, select Control Panel, select System and Maintenance, select Administrative Tools, and double-click Data Sources (ODBC). When UAC is on, the User Account Control window opens. Click Continue. The ODBC Data Source Administrator window opens.

2 Click the System DSN tab to display it. The data sources for the databases are listed.

3 Click Cancel to close the ODBC Data Source Administrator window.

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Confirm Local System Account for Taskmaster Server Service (Vista)

When you perform the default Datacap Taskmaster installation and configuration on a single Workstation, the Taskmaster Server Service uses the Local System account to log onto the Workstation.

This procedure provides instructions on how to confirm the Taskmaster Server Service uses the Local System Account.

1. From the Workstation's Windows Start menu, select Control Panel, select System and Maintenance, select Administrative Tools, and double-click Services.
   When UAC is on, the User Account Control window opens. Click Continue.
   The Services window opens.
2. Scroll down to the Datacap Taskmaster Server Service, right-click it and select Properties from the shortcut menu to open the Datacap Taskmaster Server Service Properties dialog. The General tab is displayed on top.
3. Click the Log On tab to display it. By default, the Local System account option is selected.
4. Close the Services window.

Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
   When UAC is on, the User Account Control window is displayed - click Allow.
   The TMS Configuration window opens.
2. When the Status:
   - Shows as Running, continue with the next step.
   - Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.
3. Close the TMS Configuration window.

View APT Taskmaster Client Groups, Users, Stations

When you perform the default Datacap Taskmaster installation and configuration, some Datacap Taskmaster groups, users and passwords, and stations are automatically set up for you in the APT foundation application.

Start APT Taskmaster Client

This procedure provides instructions on how to start the APT Taskmaster Client application. If you have logged into the Taskmaster Client before, the information you entered previously is displayed.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon. The Select Taskmaster Server dialog opens.

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2 Enter or ensure the default server IP address of 127.0.0.1 is displayed, and click OK. A Please login window opens.

3 Ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click OK.

4 The APT main window opens with the Operations pane displayed.

View APT Taskmaster Client Groups

This procedure provides instructions on how to view the default user security group delivered as part of the APT Taskmaster Client.

1 With the Taskmaster Client main window open, on the Settings menu, select Groups. The Taskmaster Administrator dialog opens with the Groups tab displayed on top, and the Groups listed in the left pane.

2 Select a group in the left pane.

3 In the right pane, completely expand the Privileges, Permissions, and Users branches to view the options set for this group. For example, the "Scanners" group has been granted permission to the iVScan and Upload tasks for the Web Demo, Web Demo Dot-Matrix, Web Main, and Web Main Dot-Matrix jobs.

4 Then, do one of the following:

- Click the Users tab and continue with step 2 in the View APT Taskmaster Client Users procedure.
- Click the Stations tab and continue with step 2 in the View APT Taskmaster Client Stations procedure.
- Click Done to close the Taskmaster Administrator dialog.

5 If you are finished viewing groups, users, or stations, close the Taskmaster Client window. A confirmation message box is displayed. Click Yes to close the Taskmaster Client window.

View APT Taskmaster Client Users

This procedure provides instructions on how to view the default user permissions delivered as part of the APT Taskmaster Client.

1 With the Taskmaster Client main window open, on the Settings menu, select Users. The Taskmaster Administrator dialog opens with the Users tab displayed on top and the Users listed in the left pane.

2 Select a user in the left pane.

3 In the right pane, completely expand the Privileges, Permissions, and Groups branches to view the options assigned to this user. For example, the "scan1" user is part of the Scanners group, and has been granted the permissions that were granted to the group.

4 Then do one of the following:

- Click the Groups tab and continue with step 2 in the View APT Taskmaster Client Groups procedure.
- Click the Stations tab and continue with step 2 in the View APT Taskmaster Client Stations procedure.
- Click Done to close the Taskmaster Administrator dialog.

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5 If you are finished viewing groups, users, or stations, close the Taskmaster Client window. A confirmation message box is displayed. Click Yes to close the Taskmaster Client window.

View APT Taskmaster Client Stations

This procedure provides instructions on how to view the default station permissions delivered as part of the APT Taskmaster Client.

1 With the Taskmaster Client main window open, on the Settings menu, select Stations. The Taskmaster Administrator dialog opens with the Stations tab displayed on top.

2 Select a station in the left pane.

3 In the right pane, completely expand the Permissions branches to view the specific Tasks this station has permission to run. For example, the "remote" station has been granted permissions to run iVScan, Upload, and Verify tasks.

4 Do one of the following:

- Click the Groups tab and continue with step 2 in the View APT Taskmaster Client Groups procedure.
- Click the Users tab and continue with step 2 in the View APT Taskmaster Client Users procedure.
- Click Done to close the Taskmaster Administrator dialog.

5 If you are finished viewing groups, users, or stations, close the Taskmaster Client window. A confirmation message box is displayed. Click Yes to close the Taskmaster Client window.

Configure Taskmaster Web on Vista, Windows 2008, IIS 7 Server

This section provides the information you need to set up Taskmaster Web on either a Vista machine (which limits the number of users to five) or a Windows 2008, IIS 7 Server so you can use the Taskmaster Web Client for processing.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install all of the components on a single machine on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster “admin” user.

Stop or Ensure the Taskmaster Server Service is Stopped (Vista)

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped when the operating system is Vista.

1 From the Workstation’s Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
When UAC is on, the User Account Control window is displayed - click Allow.
The TMS Configuration window opens. The TMS Configuration window opens.

2 When the Status:

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- Shows as Stopped, continue with the next step.
- Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.

3 Close the TMS Configuration window.

Add or Ensure Upload Limit Setting is Large Enough in web.config (All OS)

Depending on the usual size of the images that will be uploaded from the Taskmaster Web Client, you should adjust the upload limit setting found in the web.config file when the operating system is Vista.

This procedure provides instructions on how to locate and change the setting in the web.config file that affects upload speed.

1 On the Workstation, start Windows Explorer, navigate to and open the c:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad.

2 Within the <system.web> element, locate or add the
`<httpRuntime maxRequestLength="52428" />`
element - this parameter is expressed in kilobytes.

3 Depending on the usual size of the images that are being uploaded, you can increase the size, for example:
`<httpRuntime maxRequestLength="102400" />`

4 When you have made changes, save and close the file.

Ensure Required IIS Components are Installed (Vista)

This procedure provides instructions on how to ensure that the appropriate components have been installed in Internet Information Services when the 'Workstation's operating system is Vista.

1 From the 'Workstation's Windows Start menu, select Control Panel, and on the Control Panel Home window, select Programs, and double-click Programs and Features. The Programs and Features window opens with a Tasks pane on the left.

2 In the Tasks pane, select Turn Windows features on or off.
When UAC is on, the User Account Control window opens. Click Continue.
The Windows Features window opens and displays a list of features.

3 Expand Internet Information Services, expand Web Management Tools, expand IIS 6 Management Compatibility, and select or ensure IIS Metabase and IIS 6 configuration compatibility is selected.

4 Scroll down and expand World Wide Web Services, expand Application Development Features, and select or ensure both ASP and ASP.NET are selected (selecting these options ensures other prerequisite features are selected).

5 Click OK to save your changes. Windows applies any changes you have made, then closes the Windows Features window.

6 Close the Programs and Features window.

Set IIS ASP Request Size Limit (Vista, Windows 2008)

Depending on the usual size of the images that will be processed, you should adjust the default Maximum Requesting Entity Body Limit (maxRequestEntityAllowed).

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This procedure provides instructions on how to locate and change the Maximum Requesting Entity Body Limit when the operating system is Vista or Windows 2008.

1 From the Workstation's Windows Start menu, select Control Panel, and on the Control Panel Home window, click System and Maintenance. The System and Maintenance window opens.

2 Click Administrative Tools. The Administrative Tools window opens.

3 Double-click Internet Information Services.
When UAC is on, the User Account Control window opens. Click Continue.
The Internet Information Services (IIS) Manager window opens.

4 In the Connections pane, select the Workstation. The Workstation's Home pane is displayed.

5 In the Home pane, scroll down to the IIS area and double-click ASP.
If ASP is not displayed, ensure it was installed, then restart IIS and the ASP icon should be displayed.
The ASP properties pane is displayed.

6 In the Behavior section, expand Limits Properties. Additional properties are displayed.

7 Locate Maximum Requesting Entity Body Limit (maxRequestEntityAllowed), change the value (expressed in number of bytes) to reflect the appropriate size; for example, from 200000 (200 kb) to 10238976 (10MB), then tab out. The Apply button in the Actions pane is enabled.

8 In the Actions pane, click Apply. A message box indicates the change was saved.

9 Close the Internet Information Services (IIS) Manager window.

Create (Nested) Taskmaster Web Site (Vista, Windows 2008)

This procedure provides instructions on how to create the Taskmaster web site and set the parameters required by Taskmaster Web when Taskmaster Web is installed in a Vista or Windows 2008 IIS 7 environment.

1 From the Workstation's Windows Start menu, select Control Panel, and on the Control Panel Home window, click System and Maintenance. The System and Maintenance window opens.

2 Click Administrative Tools. The Administrative Tools window opens.

3 Double-click Internet Information Services.
When UAC is on, the User Account Control window opens. Click Continue.
The Internet Information Services (IIS) Manager window opens with a Connections pane on the left.

4 In the Connections pane, expand the computer on which the web site will reside, and expand Sites, right-click the Default Web Site, and select Add Application from shortcut menu. The Add Application dialog opens.

5 Select or enter the following on the Add Application dialog:

- Alias: tmweb.net
- Application pool: Classic .NET AppPool
- Physical path: c:\Datacap\tmweb.net

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- When running on Windows 2008 x64 (64-Bit), also select Advanced Settings > Enable 32-Bit Applications and set to "True"

then click OK to save your settings, and OK to close the Add Application dialog.

6 In the Connections pane, click the Default Web Site, in the far right pane, expand Manage Web Site, and click the Configure Limits… link. The Edit Web Site Limits dialog opens.

7 Set the Connection Timeout field to 1200 (seconds), then click OK to save your change and close the Edit Web Site Limits dialog.

8 In the Connections pane, click the Default Web Site, in the middle Default Web Site Home pane, in the IIS section, double-click the HTTP Response Headers icon. The HTTP Response Headers pane opens.

9 In the far right pane, click the Set Common Headers link. The Set Common HTTP Response Headers dialog opens.

10 Select Expire Web content, select Immediately, then click OK to save your changes and close the Set Common HTTP Response Headers dialog.

11 Close the Internet Information Services (IIS) Manager window.

Create TaskRun Folder and Set Up Security (Vista, Windows 2008)

This procedure provides instructions on how to create the TaskRun processing folder required by Taskmaster Web. This folder is where batches temporarily reside while they are being processed.

IMPORTANT

The TaskRun folder name is **case-sensitive**, **must** be named TaskRun, and **must** be created within the c:\Datacap folder structure at the same level as the tmweb.net folder.

1 On the Workstation, start Windows Explorer, navigate to c:\Datacap, and create a folder named TaskRun. (Reminders: Folder name is case-sensitive; create this folder at the same level as the c:\Datacap\tmweb.net folder.)

2 In Windows Explorer, right-click the TaskRun folder, and select Properties from the shortcut menu. The TaskRun Properties dialog opens with the General tab displayed on top.

3 Click the Security tab to display it.

4 Add NETWORK SERVICE and set to allow Modify; add the local IUSR and set to allow Modify.

5 Click OK to close the TaskRun Properties dialog.

Set Up TaskRun Virtual Folder (Vista, Windows 2008)

This procedure provides instructions on how to set up the TaskRun virtual folder required by Taskmaster Web.

1 From the Workstation's Windows Start menu, select Control Panel, and on the Control Panel Home window, click System and Maintenance. The System and Maintenance window opens.

2 Click Administrative Tools. The Administrative Tools window opens.

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3 Double-click Internet Information Services.
When UAC is on, the User Account Control window opens. Click Continue.
The Internet Information Services (IIS) Manager window opens with a Connections pane on the left.

4 In the Connections pane, expand the computer on which the Taskmaster web site resides, and expand Sites, right-click the Default Web Site, and select Add Virtual Directory from shortcut menu. The Add Virtual Directory dialog opens.

5 Select or enter the following on the Add Virtual Directory dialog:

- Alias: TaskRun (case sensitive)
- Physical path: c:\Datacap\TaskRun (case sensitive)

then click OK to save your settings and close the Add Virtual Directory dialog.

Install Crystal Reports Runtime (All OS)

This procedure provides instructions on how to install the Crystal Reports Runtime files that are required by Taskmaster Web.

1 On the Workstation, start Windows Explorer, navigate to c:\Datacap\install\tmweb7cr, and double-click the Setup.exe.
When UAC is on, the User Account Control window opens. Click Continue.
The Welcome page of the Web Reports Setup wizard opens.

2 Click Next. The Select Installation Address page is displayed with default values in the Site and Virtual directory fields.

3 Change the Virtual directory to tmweb.net, then click Next. The Confirm Installation page is displayed.

4 Click Next. The Installing Web Reports page is displayed with progress messages and a progress indicator, and when complete, displays the Installation Complete window.

5 Click Close to exit the installation process and close the wizard.

Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
When UAC is on, the User Account Control window is displayed - click Allow.
The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

3 Close the TMS Configuration window.

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Configure and Test Internet Explorer 7 or 8

This section provides the information you need to set up Internet Explorer 7 or 8 so you can use the Taskmaster Web Client for processing.

Prerequisites

1. Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.
2. Complete the instructions to install all of the components on a single machine to which you have Administrative rights.
3. From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Configure Internet Explorer 7 or 8

This procedure provides instructions on how to configure Internet Explorer 7 or 8 so it can communicate with Taskmaster Web.

1. On the Workstation, start Internet Explorer 7 or 8 and display any web page.
2. On the Tools menu, select Internet Options. The Internet Options dialog opens with the General tab displayed on top.
3. Click the Security tab to display it.
4. Select the Trusted Sites icon and click the Sites button to open the Trusted sites dialog.
5. Clear the Require server verification option.
6. Enter the default IP address (http://127.0.0.1) in the Add this website to the zone field, then click the Add button. The site is added to the Websites pane.
7. Click Close. The Internet Options dialog reappears with the Security tab displayed on top.
8. Click the Custom level button. The Security Settings dialog appears.
9. Scroll down until the ActiveX controls and plug-ins settings are displayed.
10. The following settings should be Enabled – if an option is not enabled, select its Enable option :
    - Download signed ActiveX controls
    - Download unsigned ActiveX controls
    - Initialize and script ActiveX controls not marked as safe for scripting
11. Scroll down until the Miscellaneous setting are displayed.
12. Enable (or ensure it is enabled), the Include local directory path when uploading files to a server option.
13. Click OK. A warning is displayed, asking you to confirm your changes.
14. Click Yes. The Internet Options dialog reappears with the Security tab on top.
15. Click OK to close the Internet Options dialog.

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Test Internet Explorer 7 or 8

This procedure provides instructions on how to test your configuration of Internet Explorer 7 or 8.

1 Start Internet Explorer.

2 Enter the default IP address (http://127.0.0.1) followed by the TMWeb.net virtual directory and the test page (http://127.0.0.1/TMWeb.net/ietest.aspx) then press <Enter> The IE Test page is displayed.

3 Click Test. The red Xs will change to green checkmarks when the test completes successfully.

Run APT Taskmaster Web Client Application

This section provides the information you need to run the Datacap Taskmaster foundation APT Taskmaster Web Client application "out of the box."

These instructions involve starting the Taskmaster Server Service, starting the Taskmaster Web Client, and running the default browser-based tasks to process pre-scanned images. This section also provides instructions for running Taskmaster Web Client reports.

Overview of APT Taskmaster Web Client

The default shortcuts you run, and the sequence in which you run them using the APT Taskmaster Web Client are as follows:

This shortcut	Allows you to
Scan	Process sample, pre-scanned images.
Upload	Move scanned images to the Taskmaster Server Service for further processing
Verify	Perform data validation.

NOTE

To complete processing, the APT Batch Profiler and Export tasks must be run manually from the APT Taskmaster Client (thick client). Or, in a client/server environment, the APT Batch Profiler and Export tasks can be run automatically as background tasks by either the Taskmaster Client Service or Datacap Rulerunner Quattro.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install all of the components and to configure Taskmaster Web on a single Vista Workstation on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

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Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
When UAC is on, the User Account Control window is displayed - click Allow.
The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

3 Close the TMS Configuration window.

Access Taskmaster Web Login Page and Login

This procedure provides instructions on how to login to the APT Taskmaster Web Client application using Internet Explorer.

1 Open Internet Explorer, and enter the IP address of the Taskmaster Server Service followed by the alias you assigned to the website (http://127.0.0.1/tmweb.net). After a pause, the Taskmaster Login window is displayed.
NOTE: You may have to turn off Internet Explorer's popup blocker the first time you display the Login page.

'2 On the Taskmaster Web Login Page, enter the following:

Field	Value
Application	APT
User ID	admin
Password	password obtained from Datacap
Station	remote

3 Click Login. The APT Taskmaster Web Client main window opens with the Operations pane and Available shortcuts displayed.

Run APT Taskmaster Web Client Scan Task

This procedure provides instructions on how to run the APT Taskmaster Web Client virtual scan task and begin processing the sample invoices.

1 On the Workstation, in the Operations pane, click the Scan shortcut. The list of available jobs is displayed.

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2 Click the Web Demo shortcut. The Web Demo Scan page is displayed. The batch number assigned to this batch of documents is located in the upper left of the page. By default, the Multiple files option is selected.

3 In the lower right of the page, if necessary change the Scan Into path – this path indicates the location into which the pre-scanned images are temporarily placed.

4 Click Browse, navigate to the folder where the pre-scanned images are located (\APT\images), select the first one, then click Open. The Web Demo Scan page is redisplayed with the path to the Source folder.

5 If you don't want to process all of the sample invoices (four single-page invoices and one two-page invoice), change the number in the Expected pages field to the number of images (not documents) you want to process, then click Scan. A window indicates that scanning is taking place. The pages are scanned, images of the pages are displayed, the batch-specific name of the folder is appended to the Scan Into path and an End of scan message is displayed.

6 Click OK. The message box closes.

7 The following table describes some of the things you can do on the Web Demo Scan dialog:

To	Do This
Change sequence of pages	Select either the image in the left pane, or the name of the image in the right page that you want to move, then click either the MoveUp or MoveDown arrow
Delete all pages	Click Remove All
Delete a single page	Select the image you want to delete, then click Remove
Enlarge scanned images	Click Zoom in
Shrink scanned images	Click Zoom out
Rotate an image	Click Rotate 90^0
Complete the Scan Task processing of the batch	Click Done
Cancel the Scan Task processing of the batch; deletes batch and all batch data from system	Click Cancel
Put the batch on hold and end processing of the batch; batch remains available to same user	Click Hold

8 After all images have been scanned, click Done. A message box is displayed indicating the Batch finished with a status of finished.

9 Click OK. A message box asks if you want to continue processing.

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10 Click Stop. The message box closes and the Operations pane is redisplayed.

11 When the Scan task finishes successfully, the source images have been collected into a batch and copied to the batch's uniquely-numbered folder found in the Scan Into folder.

12 Click the Monitor tab to view information about the batch. To refresh the information displayed, press F5. The Job, Task, and Status for this batch have been updated and are now Web Demo, Upload, *pending*.

Run APT Taskmaster Web Client Upload Task

This procedure provides instructions on how to run the APT Taskmaster Web Client upload task.

1 On the Workstation, in the Operations pane, click the Upload shortcut. The Upload window opens and A transferring the batch to server message is displayed briefly, then closes. A message box is displayed indicating the batch has finished with a status of finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click Stop. The message box closes and the Operations pane is redisplayed.

4 When the Upload task finishes successfully, the scanned images have been moved to the batch's uniquely-numbered folder found in \APT\batches on the Workstation and ivscan and upload xml files have been created.

5 Click the Monitor tab to view information about the batch. To refresh the information displayed, press F5. The Job, Task, and Status for this batch have been updated and are now Web Demo, Batch Profiler, *pending*.

Start APT Taskmaster Client

This procedure provides instructions on how to start the APT Taskmaster Client application. If you have logged into the Taskmaster Client before, the information you entered previously is displayed.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon. The Select Taskmaster Server dialog opens.

2 Enter or ensure the default server IP address of 127.0.0.1 is displayed, and click OK. A Please login window opens.

3 Ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click OK.

4 The APT main window opens with the Operations pane displayed.

Run APT Taskmaster Client Batch Profiler Task (Background Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Batch Profiler task.

1 On the Workstation, in the Operations pane, double-click the Background shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. 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.

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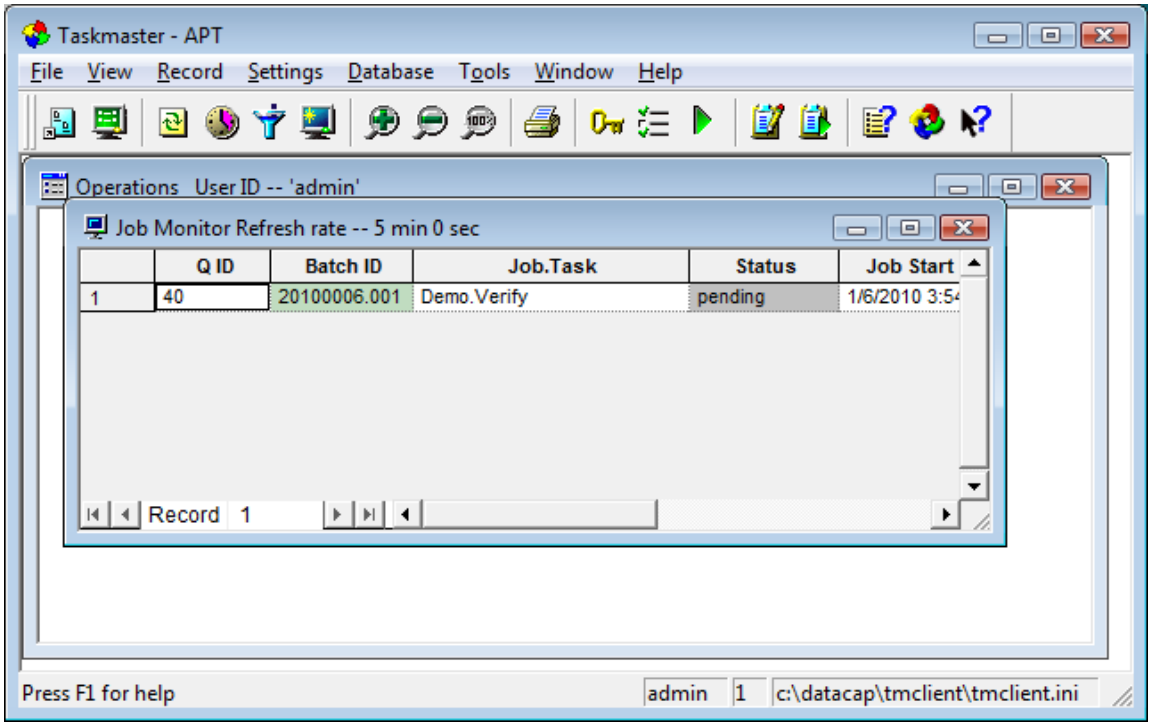
2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed. When the Batch Profiler task finishes successfully, the images have been organized into documents, copies (TIO) have been made of the original images, fingerprint (CCO) and page XML files have been created, along with a BatchProfiler.xml file in the batch's uniquely-numbered folder in \APT\batches.

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Verify* and *pending*.



Run APT Taskmaster Web Client Verify Task

This procedure provides instructions on how to run the Taskmaster Web Client Verify task.

1 On the Workstation, in the Operations pane, click the Verify shortcut. The verification panel opens with the first image displayed.

2 The following table describes some of the things you can do on the verification panel:

To	Do This
Move to the next data field	Press <Tab>
Move to the next low confidence character	Click Next LC

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To	Do This
Fill empty field with data using Click N Key	Click in the empty data entry field, then do one of the following: Point at the field value on the image and click it, or, Click and drag the mouse to draw a rectangular box around the existing field data on the image
Complete processing of image and display next image	Click SuBmit
Mark the document for deletion, rescanning, or review	Select appropriate choice from Routing Instructions dropdown list
Display the first page of the next document in the batch without submitting or revalidating data	Click Next Page
Display the first page of the previous document in the batch without submitting or revalidating data	Click Previous Page
Display the first page, next page, previous page, or last page of the current document	Click the Page No |< > < or >| Browse button
Display the details of the first line item, next line item, previous line item or last line item	Click the Lineitem |< > < or >| Browse button
For all detail lines, locate all field values for all fields	Click Find Details
Calculate missing numeric values using existing values and automatically fill blank numeric fields	Click Calculate Blank
Move to the next problem document in the batch	Click Next Problem
Move to the previous problem document in the batch	Click Previous Problem
Identify the type of invoice	Select from Invoice Type dropdown list
Display snippet associated with a field	Select Disp snip
Create new fingerprint for this invoice	Select Yes from Add New Fingerprint dropdown list

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To	Do This
Put entire batch on hold	Click Hold
Override an error	Select Override

3 When you have finished with the last document and click SuBmit, a message box is displayed indicating all documents are complete.

4 Click OK. The message box closes and another message box is displayed indicating the task on the batch has finished with a status of finished.

5 Click OK. A message box asks if you want to continue processing.

6 Click No. The message box closes and the Operations pane is redisplayed.

7 When the Verify task finishes successfully, page XML files have been updated (for example, when low confidence characters have been changed during Verify), and a Verify.xml file has been created in the batch's uniquely-numbered folder found in \APT\batches on the Workstation.

8 Click the Monitor tab to view information about the batch. To refresh the information displayed, press F5. The Job, Task, and Status for this batch have been updated and are now Web Demo, Export, *pending*.

Run APT Taskmaster Client Export Task (Export Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Export task.

1 On the Workstation, in the Operations pane, double-click the Export shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. A message box is displayed indicating that the Export task finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Export task finishes successfully:

- 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.
- An Export XML file has been added to the batch's uniquely-numbered folder found in \APT\batches.
- 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 batch's uniquely-numbered folder in \APT\batches; the images and information about the images are not exported.

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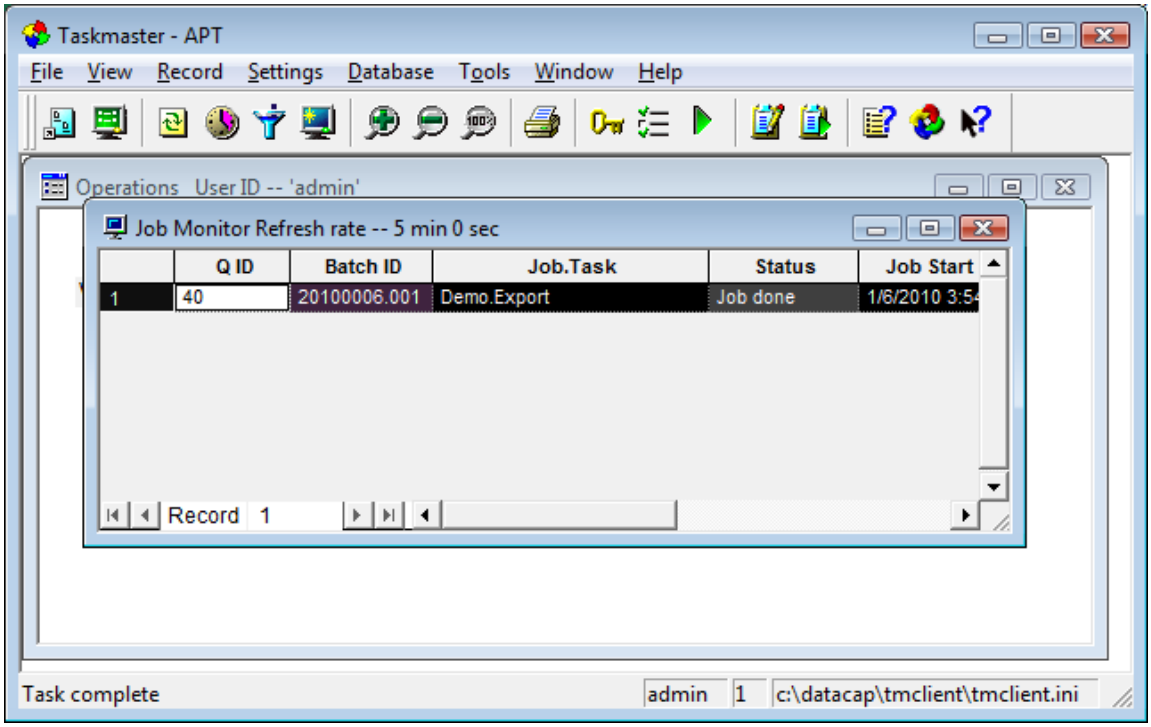
4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *Job Done*.



Generate APT Taskmaster Web Client Reports Manually

This section provides the information you need to run the Datacap Taskmaster sample Taskmaster Web Client APT reports "out of the box."

Overview of APT Taskmaster Web Client Report Viewer

The Taskmaster Web Client **APT** Report Viewer is built into the Taskmaster Web Client and you access it from the Reports link on the Monitor pane.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install and configure all of the components on a single machine on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

4 To view actual data on one or more reports, run one or more of the Taskmaster Client or Taskmaster Web Client APT tasks.

5 Ensure the Taskmaster Server Service is started.

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Create Taskmaster Web Client Reports Manually

This procedure provides instructions on how to generate Taskmaster Web Client reports manually.

1 With the Taskmaster Web Client Operations window open, click Monitor. The Job Monitor window opens.

2 Click Reports to display the list of Available reports.

3 Select the report you want to generate. A Selected report details pane opens on the right. In the:

- Available filters portion of the dialog, select a filter (optional)
- Date portion of the dialog, make changes to indicate the time period to be included on the report

then click Show Report. The report is displayed.

4 Use the buttons and fields on the toolbar as follows:

To	Do This
Export data to PDF file	1 Click Export. The Export the Report window opens. 2 Select Acrobat Format (PDF) from the drop-down list. If you want to export a subset of the pages, select Pages and enter the From and To page numbers. 3 Click OK. The report pages are displayed in an Adobe Acrobat viewer window. 4 Click Save to save the report pages as a PDF file, or use the other buttons and fields on the toolbar as appropriate.

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To	Do This
Export data to DOC, XLS, or RTF file	1 Start the application (Microsoft Word, Microsoft Excel) into which you want to place the report data. 2 Switch back to the Taskmaster Web Client report window, and click Export. The Export the Report window opens. 3 Select the appropriate file format from the drop-down list. If you want to export a subset of the pages, select Pages and enter the From and To page numbers. 4 Click OK. The report pages are displayed in a viewer window. 5 Press <CTRL+ A> and then <CTRL + C> to select and copy the contents of the report pages to the Windows Clipboard. 6 Switch to the other application (Microsoft Word, Microsoft Excel) and press <CTRL + V> to paste the contents of the report into that application. 7 On the File menu, select Save As, then name and save the report in the application's file format.
Print report	1 Click Print. The Print the Report window opens. 2 If you want to print a subset of the pages, select Pages and enter the From and To page numbers. 3 Click OK. The report pages are displayed in an Adobe Acrobat viewer window. 4 Click Print. The Windows Print window opens. 5 Adjust the Windows Print controls as appropriate, then click OK to print the report pages. 6 Close the viewer window.
Show or Hide Group Tree	Click Show/Hide Group Tree.
Display first page of report	Click First.
Display previous page	Click Prev.
Display next page	Click Next.
Display last page of report	Click Last.
Display specific page	Enter a page number then click Go To.
Search for a string on the report	Enter the string you want to search for, then click Find. The string is highlighted on the report.

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To	Do This
Resize (enlarge or shrink) the report	Select the appropriate percentage from the drop-down list.
Close report and return to the list of Available reports	Click << Back to Reports Selection.

5 To close the report and return to the list of reports, click <<Back to Reports Selection. The list of Available reports is displayed.

6 Logoff the Taskmaster Web Client.

Run Datacap Studio Application

This section provides the information you need to run the Datacap Studio application. These instructions involve starting the Taskmaster Server Service, and starting Datacap Studio.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install all of the components on a single machine on which you have Administrative rights.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
When UAC is on, the User Account Control window is displayed - click Allow.
The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

3 Close the TMS Configuration window.

Start Up Datacap Studio

This procedure provides instructions on how to start up Datacap Studio.

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1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Datacap Studio, and select Datacap Studio again. A Taskmaster Server dialog opens.

2 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.

3 Select the Work offline. Internal Rulerunner service option, then click Next. The Select Application – Applications dialog opens.

4 Select the appropriate application and click Next. A Connection Progress window is displayed briefly, then the Select Application – Taskmaster Login dialog opens.

5 Select the Taskmaster authentication option, and ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click Finish. The Datacap Studio main window opens with the Rulemanager tab displayed on top.

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Chapter 4

Install, Configure, and Run on Client and Server

This chapter provides the information you need to install, configure, and run Datacap Taskmaster 7.6 Server, Web, various services, and Clients in a client/server, Windows desktop and/or web-based environment for development, test, and production purposes. It also includes instructions that guide you through using the APT foundation application so you can see it process sample batches of documents.

The server ("Server") hosts the Taskmaster Server, the applications, batch files, and databases. For the Server, these instructions cover Vista (which limits the number of users to five), as well as Windows 2000, Windows 2003, and Windows 2008.

The workstation ("Workstation") hosts the thick clients (Taskmaster Client, Report Viewer, Datacap Studio, etc.) and the browser. For the Workstation, these instructions cover Vista, and Internet Explorer 6, 7, and 8.

An optional, separate server ("RRServer") hosts Rulerunner running as a web service. For RRServer, these instructions cover Windows 2003.

These instructions also include account settings for five types of users: Developers with administrative rights on both Server and Workstation, the Taskmaster Server Service, Taskmaster Client Service, Rulerunner running as a web service, and end users.

Following these instructions enables you to set up and run each of the Taskmaster software components "out of the box" in a client/server environment, including:

- Taskmaster Server Service
- Datacap Studio Application Wizard
- Taskmaster Client APT processing
- Taskmaster Client APT Report Viewer
- Taskmaster Web
- Taskmaster Web Client APT processing
- Taskmaster Web Client APT report generation
- Datacap Studio
- Taskmaster Client Service
- Running Taskmaster using Windows Authentication
- Rulerunner running as a web service

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The sections are sequenced deliberately, as some items in later sections depend on steps from the previous sections having been completed successfully.

For a checklist of the account and configuration settings, see **Appendix B Client/Server Setup Checklist.**

WARNINGS

The steps for installing and configuring on more than one machine are significantly different than the steps for installing on a single machine. For information on how to install on a single machine, see Chapter 3 Install, Configure, and Run on Single Vista Machine.

While the installation package (Setup.exe) can be located anywhere (for example, on an accessible network drive, or in the Server's or Workstation's CD/DVD drive), the destination of the installed software must be on a physical hard drive of the machine from which you run the Setup.exe.

Your initial Taskmaster software installation must be into the c:\Datacap folder on the Server and Workstation. If you do not use this installation path, the foundation (APT, Flex) and sample (Survey, Express) applications will not function.

Overview of Taskmaster Installation on Client and Server

The Taskmaster installation, configuration, and run processes are performed in the following sequence (the foundation application, APT, is used as the example throughout this documentation):

1. Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.
2. Install the Taskmaster Server, Taskmaster Web, and Support Files software components on the Server.
3. On Windows 2000 Server, also install the scripting program.
4. Reboot the Server.
5. Configure Taskmaster on the Server.
6. Install the Taskmaster Client, Support Files, and Documentation software components on the Workstation.
7. Reboot the Workstation.
8. Configure Taskmaster Client on the Workstation.
9. Copy the APT application to the Server.
10. Complete Server configuration.
11. Run Taskmaster Client.
12. Configure Taskmaster Web on Server.
13. Configure Internet Explorer on Workstation.
14. Run Taskmaster Web Client.
15. Configure Taskmaster Client Service.

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16 Run Taskmaster Client Service.

17 Configure Rulerunner as a web service.

18 Run Taskmaster Client application using Rulerunner running as a web service.

19 Configure Taskmaster to use Windows Authentication

20 Run Taskmaster Client application using Windows Authentication

Installation Instructions for Server

This section provides the information you need to install the appropriate Datacap Taskmaster components on your Server.

Ensure Prerequisites are Met

Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

Install Taskmaster Server, Web, and Support Components on Server

This procedure provides instructions on how to run the Taskmaster InstallShield Wizard on a Server to install the Taskmaster Server, Taskmaster Web, and Support software components, and then reboot the machine.

These instructions apply to Vista (which limits the number of users to five), Windows 2003, and Windows 2008 Server. If you are installing on Windows 2000 Server, follow these instructions and the instructions in Install Other Third-Party Software for installing the scripting program required by Taskmaster.

WARNINGS

The steps for installing and configuring on more than one machine are significantly different than the steps for installing on a single machine. For information on how to install on a single Vista machine, see Chapter 3 Install, Configure, and Run on Single Vista Machine.

While the installation package (Setup.exe) can be located anywhere (for example, on an accessible network drive, in the Server's CD/DVD drive), the destination of the installed software must be on a physical hard drive of the machine from which you run the Setup.exe.

Your initial Taskmaster software installation must be into the c:\Datacap folder on the Server. If you do not use this installation path, the foundation (APT**, Flex) and sample (Survey, Express) applications will not function.**

1 Make the installation package available on your network, or insert the Taskmaster CD in the Server's CD/DVD drive. If the installation process does not start automatically, or if the package is on the network, open Windows Explorer, navigate to and double-click the Setup.exe.
When UAC is on, the User Account Control window opens. Click Allow.
The Taskmaster Setup InstallShield Wizard opens.

2 If the Microsoft MSXML 6.0 Parser:

- Is not yet installed on the Server, the window contains a message about this requirement: Click Install. A progress window is displayed and then closes.

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- Is installed, the installation process continues to the next step.

3 The InstallShield Wizard displays a Preparing to Install... window followed by the InstallShield Wizard Welcome window.

4 Click Next. The License Agreement window opens.

5 Click I accept the terms in the license agreement and click Next. The Setup Type window is displayed with the Complete option selected.

6 Select the Custom option, then click Next. The Custom Setup window is displayed.

7 Click the drive icon to the left of Taskmaster Client, and select This feature will not be available. The drive icon is replaced by a red X.

8 Click the drive icon to the left of Documentation, and select This feature will not be available. The drive icon is replaced by a red X.

9 Click Next. The Ready to Install the Program window is displayed.

10 Click Install. The Installation Wizard displays progress messages and a progress indicator, and when complete, displays the InstallShield Wizard Complete window.

11 Click Finish. A prompt to reboot your machine is displayed.

12 If you are installing on:

- Windows 2000, click No, continue with the instructions below in Install Other Third-Party Software, and then reboot the Server.
- Vista, Windows 2003, or Windows 2008, if you want to install one or more sets of scripting documentation, click No, and continue with the instructions in Install Other Third-Party Software, and then reboot the Server.
- Otherwise, click Yes to reboot the Server.

Install Other Third-Party Software

When you are installing on Windows 2000, this procedure provides instructions on how to locate the instructions for installing the scripting program required by Taskmaster.

When you are installing on Vista, Windows 2003, and Windows 2008, this procedure provides instructions on how to locate the instructions for installing one or more sets of scripting documentation.

1 On the Server, open Windows Explorer, navigate to c:\Datacap\support\download, and open the readme.txt file.

2 If you are installing on Windows 2000, follow the instructions in the readme.txt file to install the appropriate scripting program.

3 Optionally, when installing on any operating system, follow the instructions in the Optional Utilities/Documents to Install section of the readme.txt file to install one or more sets of scripting documentation.

4 Close the readme.txt file and Windows Explorer.

Reboot Server after Install

After completing the Taskmaster Installation process, reboot the Server.

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Configure Taskmaster on Server

This section provides the information you need to set up Taskmaster on the Server. All of the Taskmaster components require the Taskmaster Server Service to function, and the appropriate folder and security permissions must be granted.

Create or Ensure Account Exists for Taskmaster Server Service

When you perform the default Datacap Taskmaster installation and configuration, the Taskmaster Server Service uses the Local System account to log onto the Server.

In a client/server environment, create or ensure a specific domain account exists for the Taskmaster Server Service.

Grant Taskmaster Server Service Log On as a Service Right

This procedure provides instructions on how to ensure the domain account used by the Taskmaster Server Service has been granted the Log On as a Service right on the Server, and optionally, change the Service's start-up behavior when the Server is rebooted.

1. From the Server's Windows Start menu, select Control Panel, on Vista select System and Maintenance, select Administrative Tools, and double-click Services.
   When UAC is on, the User Account Control window opens. Click Continue.
   The Services window opens.
2. Right-click Datacap Taskmaster Server Service and select Properties. The Datacap Taskmaster Server Service Properties dialog opens with the General tab displayed on top.
3. If you want the Taskmaster Server Service to start automatically when the Server is rebooted, change the Startup Type to Automatic and click Apply to save your change.
4. Click the Log On tab to display it, then select This account. The Browse button is enabled.
5. Locate or enter the domain name, user name and password of the Taskmaster Server Service, and click Apply. A message is displayed confirming the user was granted the Log On as a Service right.
6. Click OK to close the message box.
7. Click OK to close the Datacap Taskmaster Server Service Properties dialog.
8. Close the Services window.

Ensure Accounts Exist for End Users

Ensure domain/Windows accounts exist for your end users.

Share Datacap Folder and Set Sharing Permissions (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate sharing permissions for the c:\Datacap folder when the Server's operating system is Vista or Windows 2008.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Properties. The Properties dialog opens with the General tab displayed.
2. Click the Sharing tab to display it, then click Advanced Sharing.
   When UAC is on, the User Account Control window is displayed. Click Continue.
   The Advanced Sharing dialog opens.

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3 Click Share this Folder and keep Datacap as the Share name.

4 Click Permissions. The Permissions for Datacap dialog is displayed.

5 Add NETWORK SERVICE and add local IUSR and allow Full Control.

6 Add/ensure Domain/Windows User IDs of developers are set to allow Full Control.

7 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control.

8 When Batches folders are staying on Server in c:\Datacap\Application, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control.

Share Datacap Folder and Set Sharing Permissions (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate sharing permissions for the c:\Datacap folder when the Server's operating system is Windows 2000 or Windows 2003.

1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Sharing and Security. The Sharing tab is displayed.

2 Click Share this Folder and keep Datacap as the Share name.

3 Click Permissions. The Permissions for Datacap dialog is displayed.

4 Add ASP.NET Machine Account (Server\ASPNET) and set to allow Full Control; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Full Control.

5 Add/ensure Domain/Windows User IDs of developers are set to allow Full Control.

6 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control.

7 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control.

Set Up Security on Shared Folder (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate security for the c:\Datacap folder when the Server's operating system is Vista or Windows 2008.

1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Properties. The Properties dialog opens with the General tab displayed.

2 Click the Security tab to display it, then click Edit.
When UAC is on, the User Account Control window is displayed. Click Continue.
The Permissions for Datacap dialog opens.

3 Add/ensure Domain/Windows User IDs of developers who can change existing Taskmaster applications are set to allow Read & Execute (this developer cannot create new applications).

4 Add/ensure Domain/Windows User IDs of developers who can create new Taskmaster applications in the c:\Datacap folder are set to allow Full Control.

5 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Read & Execute.

6 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Read & Execute.

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Set Up Security on Shared Folder (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate security for the c:\Datacap folder when the Server's operating system is Windows 2000 or Windows 2003.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Sharing and Security. The Sharing tab is displayed.
2. Click the Security tab to display it.
3. Add/ensure Domain/Windows User IDs of developers who can change existing Taskmaster applications are set to allow Read & Execute (this developer cannot create new applications).
4. Add/ensure Domain/Windows User IDs of developers who can create new Taskmaster applications in the c:\Datacap folder are set to allow Full Control.
5. Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Read & Execute.
6. When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Read & Execute.

Ensure TMServer's Registry Points to TMServer

Edit or ensure that the Server's Windows registry RRS\locations\rrs key reflects the UNC name of the TMServer (rather than C:\) and the path to the \\Server\Datacap\RRS folder.

Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\

Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1. From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.
2. When the Status:
   - Shows as Running, continue with the next step.
   - Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

   If a Taskmaster Server Service error is displayed
   See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.
3. Close the TMS Configuration window.

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Installation Instructions for Workstation

This section provides the information you need to install the appropriate Datacap Taskmaster components on your Workstation so you can run the Taskmaster Client, Report Viewer, AutoDelete client software, or Datacap Studio and other developer tools.

Ensure Prerequisites are Met

Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

Install Taskmaster Client, Support, and Documentation Components on Workstation

This procedure provides instructions on how to run the Taskmaster InstallShield Wizard on a Workstation to install the Taskmaster Client, Support, and Documentation software components, and then reboot the machine.

These instructions apply to Vista.

WARNINGS

The steps for installing and configuring on more than one machine are different than the steps for installing on a single machine. For information on how to install on a single Vista machine, see Chapter 3 Install, Configure, and Run on Single Vista Machine.

While the installation package (Setup.exe) can be located anywhere (for example, on an accessible network drive, in the Workstation's CD/DVD drive), the destination of the installed software must be on a physical hard drive of the machine from which you run the Setup.exe.

Your initial Taskmaster software installation must be into the c:\Datacap folder on the Workstation. If you do not use this installation path, the foundation (APT, Flex) and sample (Survey, Express) applications will not function.

1. Make the installation package available on your network, or insert the Taskmaster CD in the Workstation's CD/DVD drive. If the installation process does not start automatically, or if the package is on the network, open Windows Explorer, navigate to and double-click the Setup.exe.
   When UAC is on, the User Account Control window opens. Click Allow.
   The Taskmaster Setup InstallShield Wizard opens.
2. The InstallShield Wizard displays a Preparing to Install... window followed by the InstallShield Wizard Welcome window.
3. Click Next. The License Agreement window opens.
4. Click I accept the terms in the license agreement and click Next. The Setup Type window is displayed with the Complete option selected.
5. Select the Custom option, then click Next. The Custom Setup window is displayed.
6. Click the drive icon to the left of Taskmaster Server, and select This feature will not be available. The drive icon is replaced by a red X.
7. Click the drive icon to the left of Taskmaster Web, and select This feature will not be available. The drive icon is replaced by a red X.

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8 Click Next. The Ready to Install the Program window is displayed.

9 Click Install. The Installation Wizard displays progress messages and a progress indicator, and when complete, displays the InstallShield Wizard Complete window.

10 Click Finish. A prompt to reboot your machine is displayed.

11 Click Yes to reboot the Workstation.

Reboot Workstation after Install

After completing the Taskmaster Installation process, reboot the Workstation.

Install Scanner

Install a scanner on the Workstation, and ensure the scanner works outside of Taskmaster.

Note: A physical scanner is not required for running the Datacap foundation or sample applications, as those applications can use the prescanned images included during installation.

Prepare for Copying APT Application to Server

If you have never run the APT Taskmaster Client application, skip the instructions in this section as the Workstation's Windows Registry will not have been changed to locate the Server, there will not be any batches to delete, and the settings to access the application have not yet been established. Continue with the instructions in Copy APT Application to Server.

If you have run the APT Taskmaster Client application, this section provides the instructions you need to delete all test batches in preparation for copying the APT application from the Workstation to the Server so a clean copy of the application can be accessed by other workstations that are running the Taskmaster Client or Taskmaster Web Client.

Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
When UAC is on, the User Account Control window is displayed - click Allow.
The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

3 Close the TMS Configuration window.

Start or Ensure Taskmaster Server Service is Started

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

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This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

3 Close the TMS Configuration window.

Start APT Taskmaster Client

This procedure provides instructions on how to start the APT Taskmaster Client application. If you have logged into the Taskmaster Client before, the information you entered previously is displayed.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon (the target of this icon should be pointing to the local TMClient.exe with parameters pointing to the APTAdm.mdb and APTEng.mdb in the application's process folder on the \\Server). The Select Taskmaster Server dialog opens.

2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. A Please login window opens.

3 Ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click OK.

4 The APT main window opens with the Operations pane displayed.

Delete All APT Batches

This procedure provides instructions on how to delete existing batches and associated batch information in the APT Engine database using the Job Monitor window.

1 On the Workstation, with the APT main window open, on the View menu, select Job Monitor. The Job Monitor window opens with information about existing batches displayed.

2 Select all of the rows displayed, and press <Del>. A Deleting batches message box appears.

3 Ensure the Delete Job Monitor records and all files option is selected, then click Yes. A message box appears identifying the first batch folder to be deleted, and prompting you to confirm you want to continue with the deletion.

4 Click OK to All. The message boxes close.

5 Press <F5> to refresh the Job Monitor window. The window should now be empty; if it is not, go back and repeat from step 2 to delete all APT batches and batch information in the Engine database.

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6 Close the APT window. A message box prompts you to confirm you want to quit.

7 Click Yes. Taskmaster Client shuts down.

Copy APT Application to Server

Overview of Copying APT to Server

This section provides the information you need to start the Datacap Studio Application Wizard, and copy the APT sample application from the Workstation to the Server so that the application can be accessed by other workstations that are running the Taskmaster Client or Taskmaster Web Client.

If you want to access the copied application using the Taskmaster Web Client, additional setup instructions are included in the configuration instructions for Taskmaster Web.

Start Datacap Studio to Use Application Wizard

This procedure provides instructions on how to start Datacap Studio on the Workstation without opening an application.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Datacap Studio, and select Datacap Studio again. A Taskmaster Server dialog opens.

2 Click Close. An empty Datacap Studio main window opens with the Rulemanager tab displayed on top.

Copy APT Application to Server

This procedure provides instructions on how to copy the APT sample application from the Workstation to the Server using the Datacap Studio Application Wizard so local and remote clients can access it.

1 On the Workstation, with an empty Datacap Studio main window open, click the Application Wizard button in the upper right. The Application Wizard – Overview window is displayed.

2 Click Next. The Application Wizard – Wizard Mode window is displayed.

3 Select the Copy an existing RRS application option, then click Next. The Application Wizard – Copy an existing application window is displayed.

4 Enter or use the browse button and Browse For Folder window to navigate to and select or create the following:

Field	Description	Example
Source RRS Application Library folder	Location on the Workstation of the source application's \RRS\Libs\AppName folder	c:\Datacap\RRS\Libs\APT
Libraries folder on target system	Target location on the Server of the application's \RRS\Libs folder	\\Server\Datacap\RRS\Libs

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Field	Description	Example
Root folder on target system	Target location on the Server where the new application folder will be created	\\Server\Datacap
Taskmaster folder on target system	Location where the Taskmaster Client software is installed on the Workstation	c:\Datacap
tmweb.net folder path	Location of the tmweb.net folder on the Server	\\Server\Datacap\tmweb.net
Rename Copy	Indicates that you want the new application to have a different name than the original APT application	N/A
New Name	Name of the new application	N/A

5 Click Next. The Application Wizard – Finish window is displayed.

6 Click Finish to begin the copying process. The wizard makes a copy of the APT application in the new location on the Server, then performs search-and-replace operations throughout the application to make all required changes. Messages and progress bars are displayed, and when the process is complete, the Application Wizard – Summary window is displayed with one or more of the following:
Warnings – Indicate the wizard encountered something unexpected, but could continue.
General – Lists the results completed successfully.
Errors – Indicate the wizard encountered a problem that must be corrected.

7 Click View Logs to open the appwiz.log file found in the \\Server\Datacap\NewApp folder and search for "error" and "warning" to locate issues you need to address. The appwiz.log contains a list of the changes to the application made by the wizard, including:

Type of Change	Information Logged
Rename Databases	Displays Before and After values
Rename Files within Folders	Displays Before and After values
Update Contents of Databases	Displays messages identifying what was updated, Displays Before and After values
Update Strings within Project Files	Displays Before and After values
Update Parameters in Rule Files (.rul)	When changed: displays Before and After values When not changed: displays Information Message – you decide if it needs to be changed, and if so, change it manually
Updates Values in Collection.xml	Displays Before and After values
Updates Fingerprint Database Name	Displays Application.xml

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8 When the application copy is successful, a Taskmaster Client shortcut is created on the Workstation that runs the local (Workstation's) Taskmaster Client executable, and accesses the Admin and Engine databases and the newly created application on the Server. The new application's Taskmaster Client shortcut is also placed in the new application's folder on the Server so that you can copy it to other Workstations where the Taskmaster Client component has been installed.

9 Exit from Datacap Studio.

Ensure Workstation's Registry Points to TMServer

Edit or ensure that the Workstation's Windows registry RRS\locations\rrs key reflects the UNC name of the TMServer (rather than C:\) and the path to the \\Server\Datacap\RRS folder.

Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\

Create Shortcuts to Newly Created Application

When the Datacap Studio Application Wizard is not successful in creating connection strings for the newly created application, it does not automatically create a Taskmaster Client application shortcut.

WARNING

Taskmaster uses connection strings in the Taskmaster Client shortcut, Report Viewer shortcut, AutoDelete shortcut, in ICP files, the Taskmaster Web Client APPS.INI file, and in many other places, and supports a number of different formats for connection strings. When you are creating shortcuts, be aware that **ALL connection strings used within a Taskmaster application must be in the same format.**

Use the information in the Taskmaster Administrator's Guide, Appendix A - Connection Strings to create the shortcuts you need and to ensure all connection strings within the application have the same format.

Complete Server Configuration

This section provides the information you need to complete the configuration of your Taskmaster Server.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

1 From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Stopped, continue with the next step.
- Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.

3 Close the TMS Configuration window.

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Set Up Security on RRS\Libs Folder (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\RRS\Libs folder on the Server when the Server's operating system is Windows 2000 or Windows 2003.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\RRS\Libs folder and select Sharing and Security. The Sharing tab is displayed.
2. Click the Security tab to display it.
3. Add ASP.NET Machine Account (Server\ASPNET) and set to allow Read & Execute; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Read & Execute.

Set Up Security on RRS\Libs Folder (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\RRS\Libs folder on the Server when the Server's operating system is Vista or Windows 2008.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\RRS\Libs folder and select Properties. The Properties dialog opens with the General tab displayed.
2. Click the Security tab to display it.
3. Add NETWORK SERVICE and local IUSR and set to allow Read & Execute.

Set Up Security on RRS\Libs\Application Folder (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\RRS\Libs\Application folder on the Server when the Server's operating system is Windows 2000 or Windows 2003.

Repeat these instructions for each c:\Datacap\RRS\Libs\Application folder on the Server - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\RRS\Libs\Application folder and select Sharing and Security. The Sharing tab is displayed.
2. Click the Security tab to display it.
3. Add/ensure Domain/Windows User ID of developer is set to allow Full Control.
4. Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control.
5. When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control.

Set Up Security on RRS\Libs\Application Folder (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\RRS\Libs\Application folder on the Server when the Server's operating system is Vista or Windows 2008.

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Repeat these instructions for each c:\Datacap\RRS\Libs\Application folder on the Server - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users.

1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\RRS\Libs\Application folder and select Properties. The Properties dialog opens with the General tab displayed.

2 Click the Security tab to display it.

3 Add/ensure Domain/Windows User ID of developer is set to allow Full Control.

4 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control.

5 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control.

Set Up Security on Datacap\Application Folder (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\Application folder on the Server when the Server's operating system is Windows 2000 or Windows 2003.

Repeat these instructions for each c:\Datacap\Application folder - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users.

1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\Application folder and select Sharing and Security. The Sharing tab is displayed.

2 Click the Security tab to display it.

3 Add ASP.NET Machine Account (Server\ASPNET) and set to allow Full Control; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Full Control.

4 Add/ensure Domain/Windows User ID of developer is set to allow Full Control.

5 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control.

6 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control.

Set Up Security on Datacap\Application Folder (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\Application folder on the Server when the Server's operating system is Vista or Windows 2008.

Repeat these instructions for each c:\Datacap\Application folder on the Server - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users.

1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\Application folder and select Properties. The Properties dialog opens with the General tab displayed.

2 Click the Security tab to display it.

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3 Add NETWORK SERVICE and local IUSR are set to allow Full Control.

4 Add/ensure Domain/Windows User ID of developer is set to allow Full Control.

5 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control.

6 When Batches folders are staying on Server in the c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control.

Create System DSNs for Newly Created Application

When the source application contains actions that connect to databases, the Datacap Studio Application Wizard log will contain the following warning:

```
WARNING! ! ! ! The following actions containing a connection string have been modified
during the copy process:
(actions are listed)
Please review the updated parameters in DStudio.  If DSNs were used in the source
application, they will have to be recreated for the new application if they don't exist
yet.
```

To ensure the newly created application will work, you must identify every System DSN (data source name) used in the application and then create a matching System DSN on every Workstation that is to access the newly created application.

This procedure provides instructions on how to identify the need for System DSNs and how to create System DSNs on a Workstation for the newly created application.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Datacap Studio, and select Datacap Studio again. A Taskmaster Server dialog opens.

2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the newly created application, then click Next. A Connection progress bar is displayed briefly, then the Select Application – Rulerunner Service dialog opens.

3 Select the Work offline. Internal Rulerunner service option, then click Next. The Select Application – Applications dialog opens.

4 Select the newly created application and click Next. The Taskmaster Login dialog opens.

5 Enter the Admin User ID, Password, and Station ID, and click Finish. The new application opens in the Datacap Studio main window with the Rulemanager tab displayed on top.

6 In the new application, locate each of the actions that were listed in the Datacap Studio Application Wizard log warning message. You can do one or more of the following:

- Expand the branches in the Document Hierarchy tab, select a ruleset bound to an object, and click the Autosync Ruleset view to DCO view button.
- Expand the branches in the Rulesets tab, select the action, and click the Autosync Ruleset view to Action Library view button
- Expand the action libraries in the Action Library tab, select the action, and click the Autosync Action Library view to Ruleset view button

7 When the action contains a parameter that references a DSN, follow the instructions in the next steps to create each of the System DSNs used in the newly created application

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on every Workstation that is to access the application. Otherwise, close Datacap Studio.

8 On the Workstation's Windows Start menu, select Settings, select Control Panel, select System and Maintenance, select Administrative Tools, and double-click Data Sources (ODBC).
When UAC is on, the User Account Control window opens. Click Continue.
The ODBC Data Source Administrator window opens.

9 Click the System DSN tab to display it. Existing data source names are listed.

10 Click Add. The Create New Data Source window opens.

11 Scroll down and select the appropriate driver, then click Finish. The ODBC Setup window for the driver opens.

12 Enter the Data Source Name for the database referenced in the application, and a Description, then click Select. The Select Database window opens.

13 Navigate to the Process folder of the newly created application, select the appropriate database and click OK. The ODBC Setup window is redisplayed with the database information displayed.

14 Click OK. The ODBC Setup window closes and the ODBC Data Source Administrator window is displayed with the newly created data source name.

15 Repeat steps 10 - 14 for each DSN referenced in the new application, then click OK to close the ODBC Data Source Administrator window.

16 Close the Administrative Tools window.

17 Close Datacap Studio.

Run APT Taskmaster Client Application

This section provides the information you need to run the Datacap Taskmaster foundation APT application “out of the box.” These instructions involve starting the Taskmaster Server Service, starting the APT Taskmaster Client application, and running the default APT tasks to process sample, pre-scanned images.

Instructions for running the default APT Taskmaster Web Client tasks are provided after the Configure Taskmaster Web on Vista, Windows 2008, IIS 7 Server instructions.

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

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- 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 and Web Demo jobs are the examples used in this documentation**.** When running the Demo jobs, 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.
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.)

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration,.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Start or Ensure Taskmaster Server Service is Started

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

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This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

3 Close the TMS Configuration window.

Start APT Taskmaster Client for the First Time (Vista)

This procedure provides instructions on how to start the APT Taskmaster Client application on the Workstation for the first time when the Workstation's operating system is Vista. Note that after the first time you log into the Taskmaster Client, it remembers and displays what you entered the previous time.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon. The Select Taskmaster Server dialog opens with a blank Server name (address) field.

2 Enter the Server's name (without initial backslashes) or the IP address of the Server hosting the application and click OK. A Station ID is missing in the profile message is displayed.

3 Click OK. An invalid login name or password message is displayed.

4 Click OK. The Please login window opens with your Window User ID and the name of your computer displayed.

5 Replace your Windows User ID with admin, use the password provided by Datacap, and replace your computer name with the number 1, then click OK. The APT Taskmaster Client main window opens with the Operations pane displayed.

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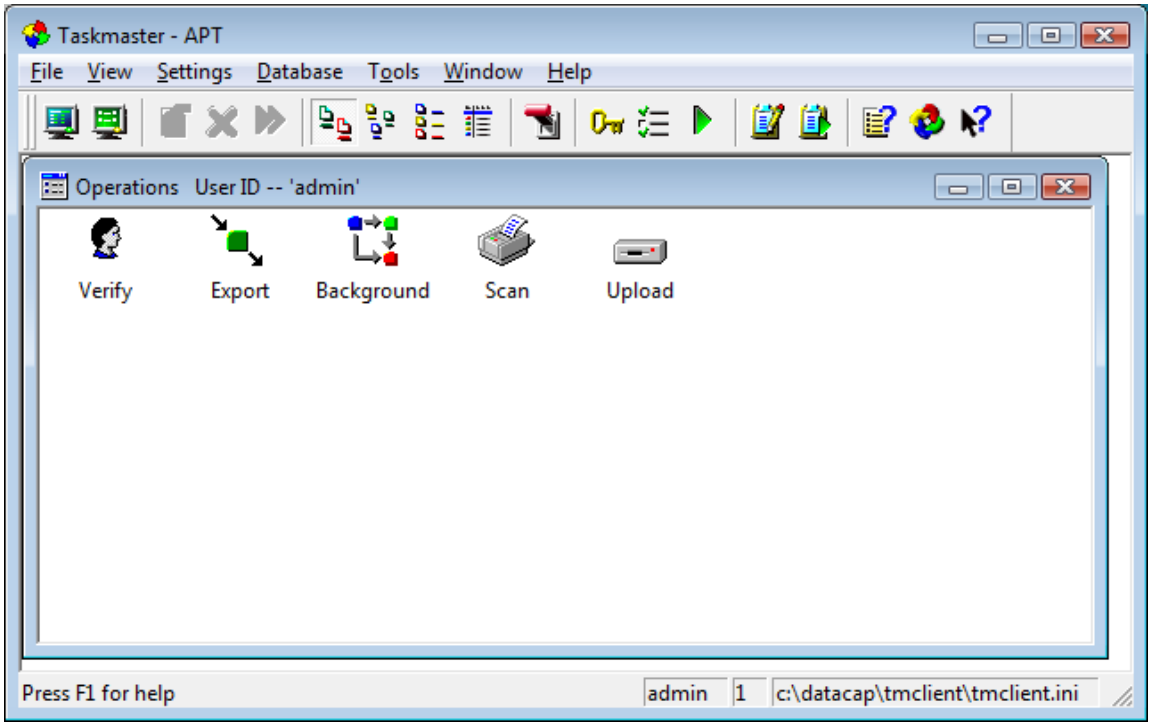

Set Up Taskmaster Application to Use Scanner

Install a scanner on the Workstation, and ensure the scanner works outside of Taskmaster before starting these instructions to define the scanner to Taskmaster.

This procedure provides instructions on how to define your scanner to a specific Taskmaster Client application.

Note: A physical scanner is not required for running the Datacap applications out-of-the-box, as these applications can use the prescanned sample images included during installation.

1. On the Workstation, with the Taskmaster Client application main window displayed, on the Settings menu, select Workflow. The Taskmaster Administrator dialog opens with the Workflow tab displayed on top.
2. In the left pane, expand the workflow, and select one of the scan jobs to expand its contents.
3. In the left pane, select the scan task. The task information in the right pane displays information about the scan task.
4. In the right pane, click Setup. The Scan Setup – Taskmaster window opens.
5. If a Scan flatbed message box appears, click Cancel. When the message box closes, another message may appear that indicates a scanner is not currently selected.
6. Click OK. A blank Scan Setup window is displayed.
7. On the File menu, select Quit. The Taskmaster Administrator dialog is redisplayed.
8. Click Setup again. The Scan Setup – Taskmaster window opens. If the message indicating that a scanner is not currently selected appears, click OK.
9. Click OK. A filled-in Scan Setup window is displayed.

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10 Click Select Scanner. A Loading Driver message box is briefly displayed, then the Scanner Selection window opens.

11 Select the scanner you want to use, then click OK. The Configure Device Settings window opens.

12 Click OK. Both windows close and the Scan Setup – Taskmaster window is redisplayed.

13 Click Done. The Scan Setup – Taskmaster window closes.

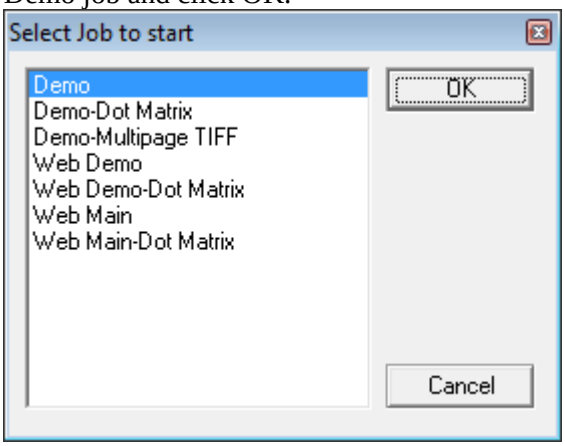
14 Click Apply to save your scanner setup settings.

15 Click Done. The Taskmaster Administrator dialog window closes.

Run APT Taskmaster Client VScan Task (Scan Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client VScan task to process pre-scanned images.

1 On the Workstation, in the Operations pane, double-click the Scan shortcut, select the Demo job and click OK.



A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. A message box is displayed indicating the task has finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the VScan task finishes successfully, APT has picked up the images from the \APT\images\Input folder and created a Taskmaster "batch," which is a collection of document images to be processed. Taskmaster has assigned a batch ID and created a uniquely-numbered folder with the name of the batch ID in \APT\batches (on the Server). This folder holds all of the document image processing results for this batch of invoices, including the newly-created rrsvscan.xml file.

4 To view information about the batch, click the View menu and select *Job Monitor* to open the Job Monitor window.

5 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Batch Profiler* and *pending*.

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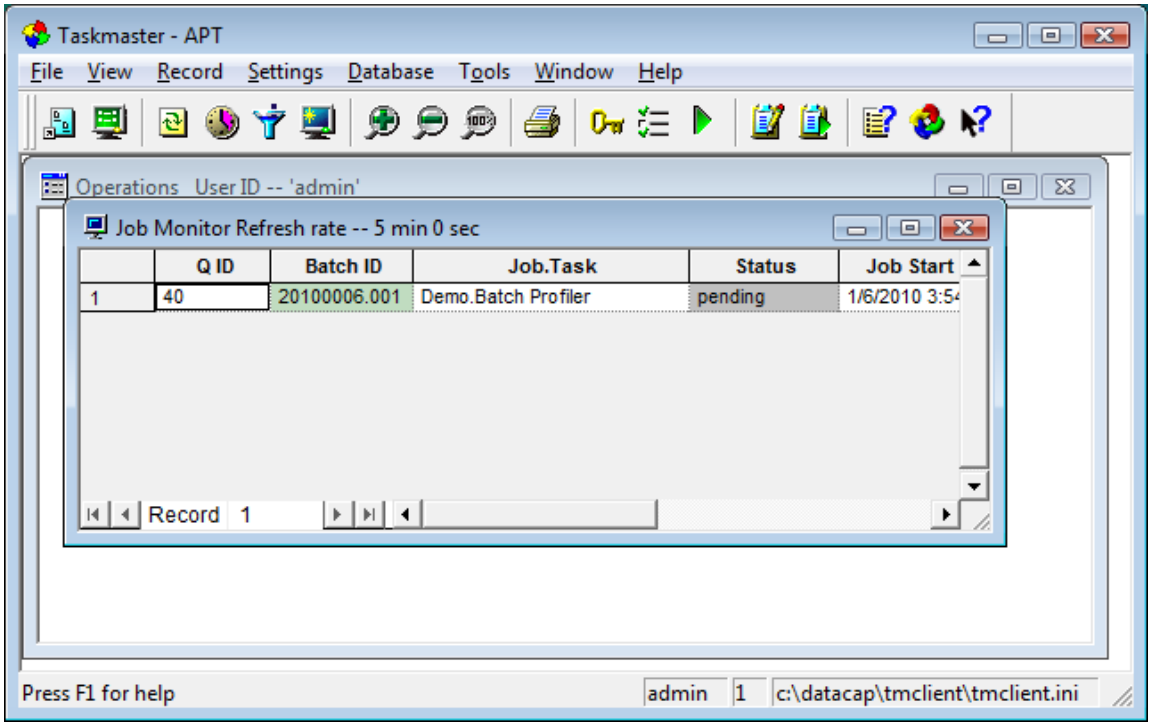

Run APT Taskmaster Client Batch Profiler Task (Background Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Batch Profiler task.

1 On the Workstation, in the Operations pane, double-click the Background shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. 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.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Batch Profiler task finishes successfully, the images have been organized into documents, copies (TIO) have been made of the original images, fingerprint (CCO) and page XML files have been created, along with a BatchProfiler.xml file in the batch's uniquely-numbered folder in \APT\batches (on the Server).

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Verify* and *pending*.

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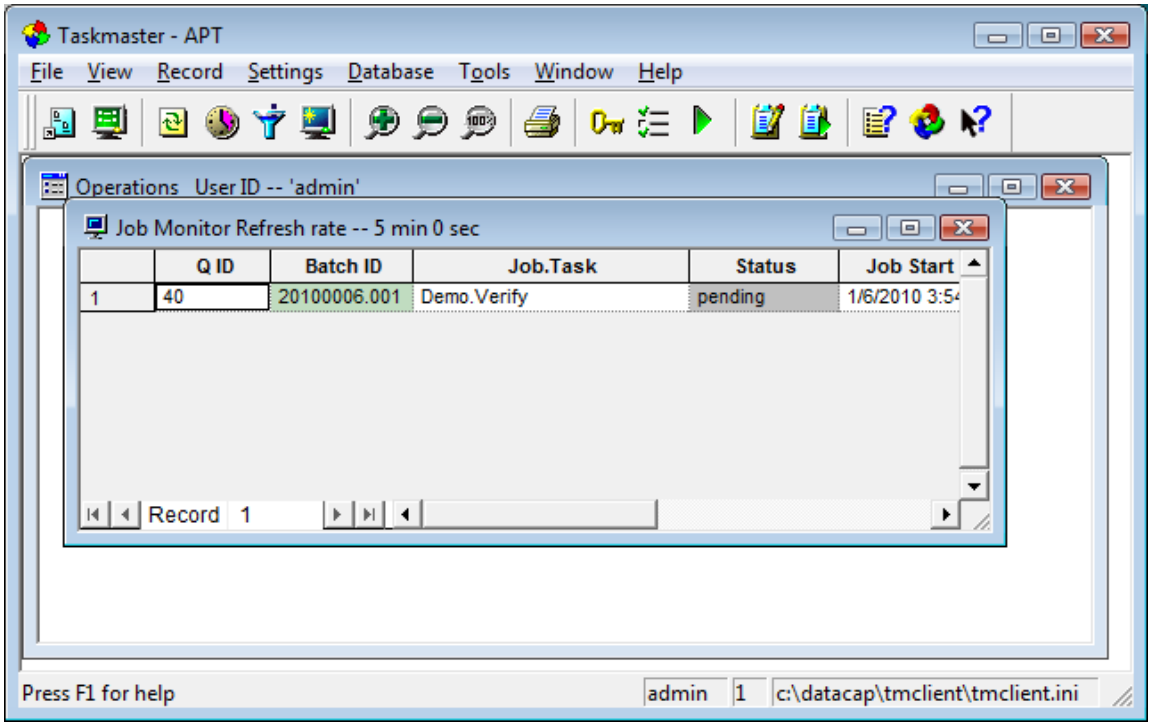

Run APT Taskmaster Client Verify Task (Verify Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Verify task.

1 On the Workstation, in the Operations pane, double-click the Verify shortcut. A Task Monitor window opens and a Rulerunner window opens, then the Verify - Batch Pilot window opens.

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

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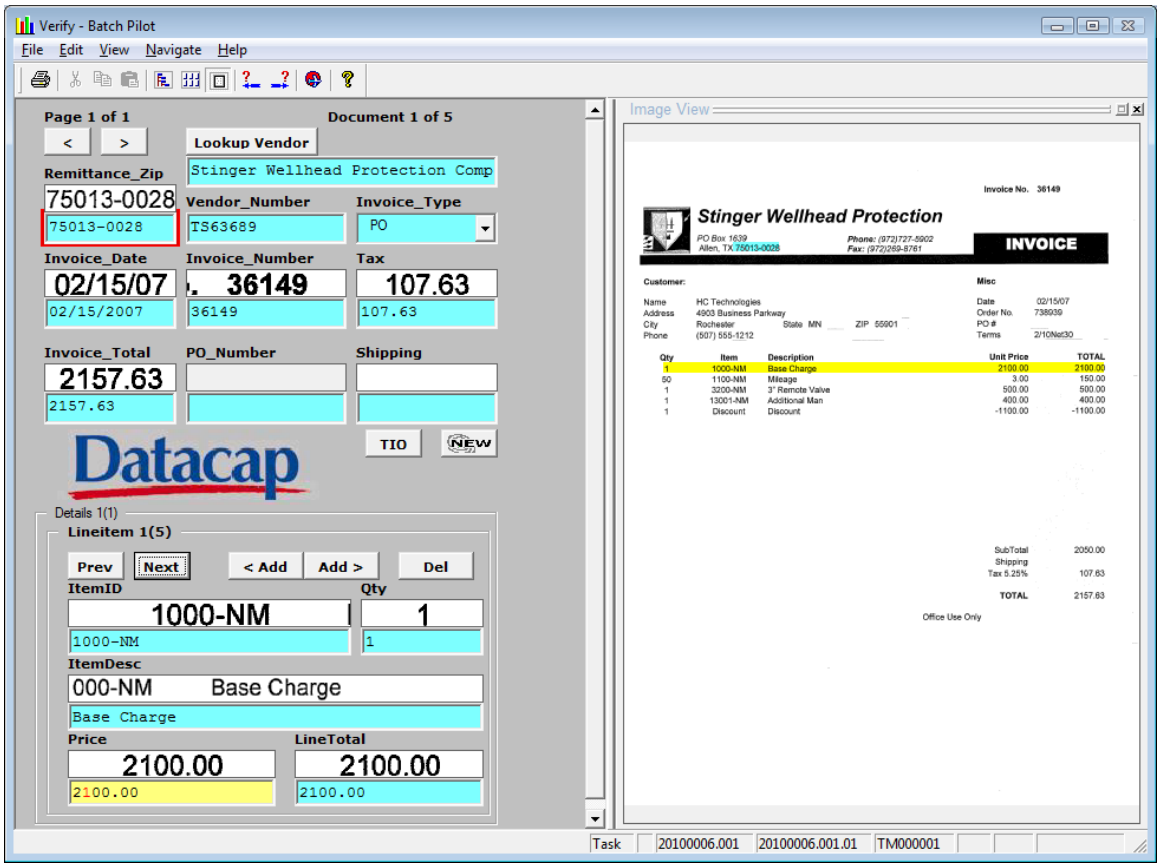

2 The following table describes some of the things you can do using buttons and hot-key combinations on the APT Verify window; for additional instructions on using the Verify window, see the section in the Taskmaster APT Quick Start Guide titled: Verify Window Instructions.

To	Do this
Move to the next data field	Press <Tab>
Move to next low confidence character	Press <Alt+L>
Fill empty field with data using Click N Key	Click in an empty data entry field, then do one of the following: Point at the field value on the document image and click it, or, Click and drag the mouse to draw a rectangular box around the existing field data on the image, or, 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, Press and hold <Shift>, click a field that has already been defined and drag the mouse to extend the field.
Invoke validation rules for entire invoice	Press <Alt+V>

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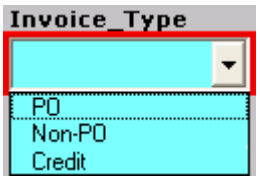
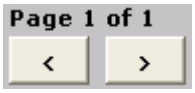
To	Do this
Delete the document that is currently displayed	Press <Alt+D>
Mark the document for review	Press <F2>
Display the next document in the batch	Press <Ctrl+Shift+N>
Display the previous document in the batch.	Press <Ctrl+Shift+P>
Move to the next problem document in the batch	Press <Ctrl+N> or Click
Move to the previous problem document in the batch	Press <Ctrl+P> or Click
Lookup and select vendor (either when blank or when incorrect vendor is displayed)	Enter at least the first character of the vendor's name and the Remittance_Zip, then click
Identify type of invoice	Select from dropdown list 
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
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

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To	Do this
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

3 Using <Tab>, <Alt+L>, <Alt+V>and other keys described above, review and validate each sample document. When the data has been validated, an End of Page Reached message will be displayed.

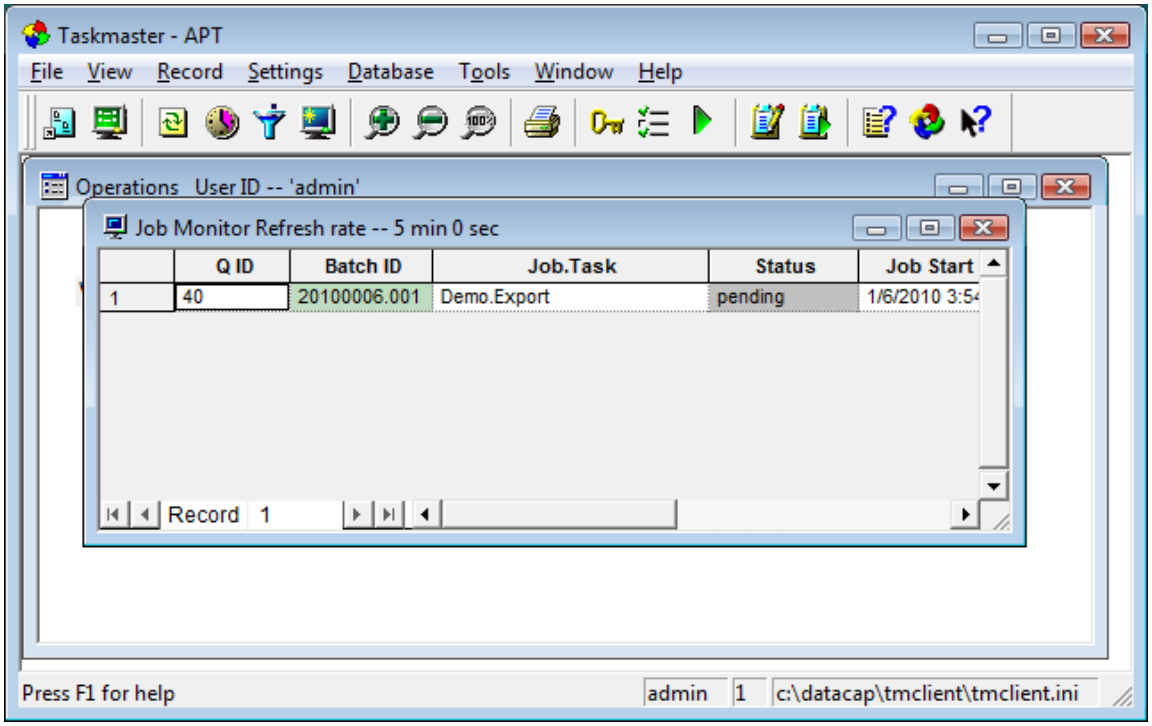
4 Click Yes to go to the next document. When you have finished processing the last invoice in the batch, a message box indicates that no additional problems were found.

5 Click Yes to finish the batch. A message box is displayed indicating the task has finished.

6 Click OK. A message box asks if you want to continue processing.

7 Click No. The message box closes and the Operations pane is redisplayed. When the Verify task finishes successfully, page XML files have been updated (for example, when low confidence characters have been changed during Verify), and a Verify.xml file has been created in the batch's uniquely-numbered folder in \APT\batches (on the Server).

8 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *pending*.



Run APT Taskmaster Client Export Task (Export Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Export task.

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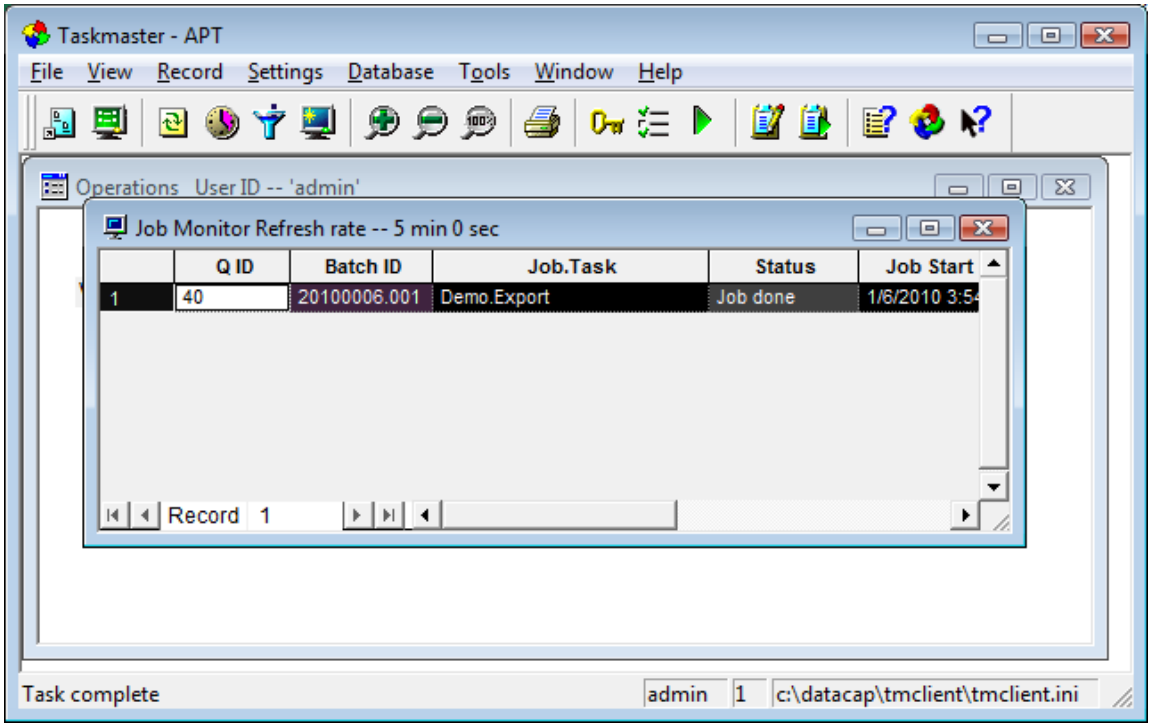
1 On the Workstation, in the Operations pane, double-click the Export shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. A message box is displayed indicating that the Export task finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Export task finishes successfully:

- 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.
- An Export XML file has been added to the batch's uniquely-numbered folder found in \APT\batches (on the Server).
- 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 batch's uniquely-numbered folder in \APT\batches (on the Server); the images and information about the images are not exported.

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *Job Done*.



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Generate APT Taskmaster Client Reports Manually

This section provides the information you need to run the sample APT Taskmaster Client reports.

Overview of APT Taskmaster Client Report Viewer

The APT Taskmaster Client Report Viewer is a separate utility program that can produce a set of standard reports "out of the box." The Report Viewer is installed when you install the Taskmaster Client software. A shortcut is automatically created on your Windows Start menu by the installation process.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

4 Ensure the Taskmaster Server Service is started.

5 To view actual data on one or more reports, run one or more of the APT Taskmaster Client or Taskmaster Web Client tasks.

Ensure APT Report Viewer Shortcut is Pointing at Server

This procedure provides instructions on how to update the target of the Report Viewer shortcut on the Workstation so it points at the correct APT rptview.ini file.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, right-click the APT Report Viewer icon and select Properties. The APT Report Viewer Properties dialog opens.

2 Change the contents of the Target field to reflect the appropriate path to the Server for the rptview.ini, and the databases.

3 Click Apply to save your changes, then click OK to close the APT Report Viewer Properties dialog.

Start APT Taskmaster Client Report Viewer

This procedure provides instructions on how to start up the APT Taskmaster Client Report Viewer. Exit the Taskmaster Client on the Workstation before starting Report Viewer on that Workstation.

Note that after the first time you log into Report Viewer, it remembers and displays what you entered the previous time.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Report Viewer icon. A Select Taskmaster Server dialog opens.

2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application, then click OK. The Report Viewer Login window is displayed.

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3 Enter User Name of admin, enter the password provided by Datacap, and ensure the Station ID is set to 1, then click OK. The Report Viewer main window opens.

Create APT Taskmaster Client Reports Manually

This procedure provides instructions on how to create a APT Taskmaster Client report manually.

1 With the Report Viewer main window open, on the Report menu, select Open. The Open Report dialog is displayed.

2 In the:

- Date portion of the dialog, make changes to indicate the time period to be included on the report
- Report portion of the dialog, select the report you want to view
- Filters portion of the dialog, select a filter (optional)

then click Open. The report is displayed.

3 Use the buttons and fields on the report toolbar as follows:

To	Do This
Set up the printer on which you want to print your reports	1 On the Report menu, click Print Report. The Print Setup window opens. 2 Clear the No Printer checkbox and select the printer you want to use from the drop-down list and adjust the other Windows Print controls as appropriate. 3 Click OK. The Windows Print window opens. 4 Click Cancel. The Windows Print window closes. 5 On the Report menu, click Close. The report window closes.
Export data to PDF file (You must have an Adobe Acrobat printer driver installed to "print" the report to a PDF file)	1 On the Report menu, click Print Report. The Print Setup window opens. 2 If necessary, clear the No Printer checkbox and select the Adobe Acrobat printer driver from the drop-down list and adjust the other Windows Print controls as appropriate. 3 Click OK. The report pages are printed to a PDF file. 4 Depending on your Adobe Acrobat settings, the PDF file may open automatically. 5 On the Report menu, click Close. The report window closes.

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To	Do This
Print report	1 Click Print. The Windows Print window opens. 2 Adjust the Windows Print controls as appropriate, then click OK to print the report pages. 3 On the Report menu, click Close. The report window closes.
Refresh the contents of the report	Click Refresh.
Show or Hide Group Tree	Click Toggle Group Tree.
Resize (enlarge or shrink) the report	Select the appropriate percentage from the drop-down list.
Display first page	Click Go to First Page.
Display previous page	Click Go to Previous Page.
Display specific page	Enter a page number then press <ENTER>.
Display next page	Click Go to Next Page.
Display last page	Click Go to Last Page.
Search for a string on the report	1 Click Search Text. The Search dialog opens. 2 Enter the string you want to search for, then click Find Next. The string is highlighted on the report. 3 To close the Search dialog, click Cancel. The Search dialog closes.
Close report	On the Report menu, click Close. The report window closes.

4 Close the Report Viewer window.

Review Default Installation Results

This section is optional. The instructions provided allow you to review the Taskmaster Client database connections, and groups, users, and stations installed by the default installation process.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

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View Default Database Connections (Vista)

When you perform the default Datacap Taskmaster installation, it automatically sets up Microsoft Access databases and ODBC connections for the default Datacap Taskmaster foundation and sample application databases.

This procedure provides instructions on how to view the ODBC connections that were set up automatically by the installation process.

1. From the Workstation's Windows Start menu, select Control Panel, select System and Maintenance, select Administrative Tools, and double-click Data Sources (ODBC). When UAC is on, the User Account Control window opens. Click Continue. The ODBC Data Source Administrator window opens.
2. Click the System DSN tab to display it. The data sources for the databases are listed.
3. Click Cancel to close the ODBC Data Source Administrator window.

Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1. From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.
2. When the Status:
   - Shows as Running, continue with the next step.
   - Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

   If a Taskmaster Server Service error is displayed
   See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.
3. Close the TMS Configuration window.

View APT Taskmaster Client Groups, Users, Stations

When you perform the default Datacap Taskmaster installation and configuration, some Datacap Taskmaster groups, users and passwords, and stations are automatically set up for you in the APT foundation application.

Start APT Taskmaster Client

This procedure provides instructions on how to start the APT Taskmaster Client application. If you have logged into the Taskmaster Client before, the information you entered previously is displayed.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon (the target of this icon should be pointing to the local TMClient.exe with parameters pointing to the APTAdm.mdb and APTEng.mdb in the application's process folder on the \\Server). The Select Taskmaster Server dialog opens.

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2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. A Please login window opens.

3 Ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click OK.

4 The APT main window opens with the Operations pane displayed.

View APT Taskmaster Client Groups

This procedure provides instructions on how to view the default user security group delivered as part of the APT Taskmaster Client.

1 With the Taskmaster Client main window open, on the Settings menu, select Groups. The Taskmaster Administrator dialog opens with the Groups tab displayed on top, and the Groups listed in the left pane.

2 Select a group in the left pane.

3 In the right pane, completely expand the Privileges, Permissions, and Users branches to view the options set for this group. For example, the "Scanners" group has been granted permission to the iVScan and Upload tasks for the Web Demo, Web Demo Dot-Matrix, Web Main, and Web Main Dot-Matrix jobs.

4 Then, do one of the following:

- Click the Users tab and continue with step 2 in the View APT Taskmaster Client Users procedure.
- Click the Stations tab and continue with step 2 in the View APT Taskmaster Client Stations procedure.
- Click Done to close the Taskmaster Administrator dialog.

5 If you are finished viewing groups, users, or stations, close the Taskmaster Client window. A confirmation message box is displayed. Click Yes to close the Taskmaster Client window.

View APT Taskmaster Client Users

This procedure provides instructions on how to view the default user permissions delivered as part of the APT Taskmaster Client.

1 With the Taskmaster Client main window open, on the Settings menu, select Users. The Taskmaster Administrator dialog opens with the Users tab displayed on top and the Users listed in the left pane.

2 Select a user in the left pane.

3 In the right pane, completely expand the Privileges, Permissions, and Groups branches to view the options assigned to this user. For example, the "scan1" user is part of the Scanners group, and has been granted the permissions that were granted to the group.

4 Then do one of the following:

- Click the Groups tab and continue with step 2 in the View APT Taskmaster Client Groups procedure.
- Click the Stations tab and continue with step 2 in the View APT Taskmaster Client Stations procedure.
- Click Done to close the Taskmaster Administrator dialog.

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5 If you are finished viewing groups, users, or stations, close the Taskmaster Client window. A confirmation message box is displayed. Click Yes to close the Taskmaster Client window.

View APT Taskmaster Client Stations

This procedure provides instructions on how to view the default station permissions delivered as part of the APT Taskmaster Client.

1 With the Taskmaster Client main window open, on the Settings menu, select Stations. The Taskmaster Administrator dialog opens with the Stations tab displayed on top.

2 Select a station in the left pane.

3 In the right pane, completely expand the Permissions branches to view the specific Tasks this station has permission to run. For example, the "remote" station has been granted permissions to run iVScan, Upload, and Verify tasks.

4 Do one of the following:

- Click the Groups tab and continue with step 2 in the View APT Taskmaster Client Groups procedure.
- Click the Users tab and continue with step 2 in the View APT Taskmaster Client Users procedure.
- Click Done to close the Taskmaster Administrator dialog.

5 If you are finished viewing groups, users, or stations, close the Taskmaster Client window. A confirmation message box is displayed. Click Yes to close the Taskmaster Client window.

Configure Taskmaster Web on Windows 2000, IIS 5 Server

This section provides the information you need to set up Taskmaster Web on a Windows 2000 server with IIS 5 so you can use the Taskmaster Web Client for processing.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration,.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster “admin” user.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

1 From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Stopped, continue with the next step.

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- Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.

3 Close the TMS Configuration window.

Add or Ensure Application Information in APPS.INI is Correct (All OS)

When you have installed an application separately (for example, Taskmaster 7.6 for Medical Claims), or have used the Datacap Studio Application Wizard to create or copy an application from a Workstation to the Server, and you want to access that application using the Taskmaster Web Client, you must ensure the application information in the APPS.INI file that is on the Server is complete and correct.

This procedure provides instructions on how to ensure the information is correct in and how to make all required changes to the APPS.INI file.

1 On the Server, start up Windows Explorer, navigate to and open the application's process folder so you can see the names of the application's databases.

2 On the Server, start up another instance of Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\apps.ini file.

3 Locate the section that contains information about the application (by default, apps.ini contains information about all of the applications shipped with Taskmaster).

4 To change information about an application that was copied to the Server, edit the application's section so that it reflects the correct:

- Application name (this is the name of the application folder on the Server)
- Server UNC name (without initial backslashes) or IP address
- Administration and Engine database names
- Paths to the various databases

5 To add information about a newly-created application, copy the entire section for an existing application (such as [APT]) and paste it below the original section but above the last line:

```
;;; End of Apps.ini entries - Do not remove this line.
```

and then edit the copied section so that it reflects the new application's:

- Application name (this is the name of the application folder on the Server)
- Server UNC name (without initial backslashes) or IP address
- Administration and Engine database names
- Paths to the various databases

6 Save the APPS.INI file, close the text editor, and close Windows Explorer.

Add or Ensure Upload Limit Setting is Large Enough in web.config (All OS)

Depending on the usual size of the images that will be uploaded from the Taskmaster Web Client to the Server, you should adjust the upload limit setting found in the web.config file that is on the Server when the Server operating system is Windows 2000, Windows 2003, Vista, or Windows 2008.

This procedure provides instructions on how to locate and change the setting in the web.config file that affects upload speed.

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1. On the Server, start Windows Explorer, navigate to and open the c:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad.
2. Within the <system.web> element, locate or add the
   `<httpRuntime maxRequestLength="52428" />`
   element - this parameter is expressed in kilobytes.
3. Depending on the usual size of the images that are being uploaded, you can increase the size, for example:
   `<httpRuntime maxRequestLength="102400" />`
4. When you have made changes, save and close the file.

Create and Share (Nested) Virtual Directory for Taskmaster Web (Windows 2000, Windows 2003)

These instructions assume you will create a virtual directory for Taskmaster Web nested within the Server's Default Web Site.

This procedure provides instructions on how to create a virtual directory for the Taskmaster Web site.

1. From the Server's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services. The Internet Information Services window opens.
2. Expand the computer on which you want to create the virtual directory, expand its Web Sites folder, right-click the Default Web Site, and on the shortcut menu, select New, then select Virtual Directory. The Welcome page of the Virtual Directory Creation Wizard opens.
3. Click Next. The Virtual Directory Alias page is displayed.
4. Enter tmweb.net as the alias, then click Next. The Web Site Content Directory page is displayed.
5. Enter the full path or use the Browse button to navigate to and select the c:\Datacap\tmweb.net folder, then click OK. The Web Site Content Directory page reappears with the full path to the tmweb.net folder displayed.
6. Click Next. The Access Permissions page is displayed.
7. Select the Read, Run scripts, and Execute options, then click Next. The completion page of the Virtual Directory Creation Wizard is displayed.
8. Click Finish. The Wizard closes and the new tmweb.net virtual directory is displayed in the Internet Information Services window.

Create TaskRun Folder, Set Up Web Sharing and Security Settings (Windows 2000, Windows 2003)

This procedure provides instructions on how to create the TaskRun processing folder on the Server that is required by Taskmaster Web. This folder is where batches temporarily reside while they are being processed.

IMPORTANT

The TaskRun folder name is **case-sensitive**, **must** be named TaskRun, and **must** be created within the c:\Datacap folder structure at the same level as the tmweb.net folder.

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1. On the Server, start Windows Explorer, navigate to c:\Datacap, and create a folder named TaskRun. (Reminders: Folder name is case-sensitive; create this folder at the same level as the c:\Datacap\tmweb.net folder.)
2. In Windows Explorer, right-click the TaskRun folder, and select Properties from the shortcut menu. The TaskRun Properties dialog opens with the General tab displayed on top.
3. Click the Web Sharing tab to display it.
4. Select the Share this folder option. The Edit Alias dialog opens displaying the folder name in the Alias field.
5. In the Application permissions group box, select the None option, and in the Access permissions group box, select Write in addition to the Read option, then click OK. The Web Sharing tab reappears with TaskRun displayed as an alias.
6. Click Apply to save your changes.
7. Click the Security tab to display it.
8. Add ASPNET Machine Account (Server\ASPNET) and set to allow Modify; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Modify.
9. Click OK to close the TaskRun Properties dialog.

Set Up TaskRun Virtual Folder (Windows 2000, Windows 2003)

This procedure provides instructions on how to set the appropriate IIS parameters for the TaskRun virtual folder required by Taskmaster Web.

1. From the Server's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services to open the Internet Information Services window.
2. Expand the computer, the Web Sites folder and the Default Web Site. If the virtual TaskRun folder is not displayed, refresh the window as many times as it takes for the TaskRun folder to appear.
3. Right-click the TaskRun folder, select Properties from the shortcut menu. The TaskRun Properties window opens with the Virtual Directory tab displayed on top.
4. Click the Remove button. The Application name field is protected, and the Remove button label changes to Create.
5. Click the Documents tab to display it.
6. If the default.aspx document is not displayed, add it and click Apply to save your change.
7. Click the Directory Security tab to display it.
8. Click the top Edit button to edit the Anonymous access and authentication control settings. The Authentication Methods dialog opens.
9. Select the Anonymous access checkbox and clear the Integrated Windows authentication checkbox, then click OK. The Authentication Methods dialog closes and the Directory Security tab is redisplayed.
10. Click the ASP.NET tab to display it.

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- If the ASP.NET version displayed is version 2.0.5nnnn, continue with the next step.
- If the ASP.NET version displayed is blank but the field is active, click the dropdown arrow, select the 2.0.5nnnn entry from the list, and continue to the next step.
- If the ASP.NET version displayed is blank or earlier than 2.0.5nnnn and you cannot select the correct entry (the field is protected), you cannot continue with this procedure. To recover, ensure that you installed Taskmaster:
  - If you did not, begin this process over again with the correct version of the Taskmaster software.
  - If you did, refer to Chapter 2 Installation and Configuration Prerequisites and follow the instructions to Run aspnet_regiis.exe to update the ASP.NET application script maps.

11 Click Apply to save any changes.

12 Click the HTTP Headers tab to display it.

13 Select the Enable Content Expiration option to activate the expiration fields.

14 Select the Expire Immediately option, then click Apply to save the change and then OK to close the TaskRun Properties dialog. The Internet Information Services window is redisplayed – the TaskRun folder's icon has changed.

Install Crystal Reports Runtime (All OS)

This procedure provides instructions on how to install the Crystal Reports Runtime files that are required by Taskmaster Web.

1 On the Server, start Windows Explorer, navigate to c:\Datacap\install\tmweb7cr, and double-click the Setup.exe.
When UAC is on, the User Account Control window opens. Click Continue.
The Welcome page of the Web Reports Setup wizard opens.

2 Click Next. The Select Installation Address page is displayed with default values in the Site and Virtual directory fields.

3 Change the Virtual directory to tmweb.net, then click Next. The Confirm Installation page is displayed.

4 Click Next. The Installing Web Reports page is displayed with progress messages and a progress indicator, and when complete, displays the Installation Complete window.

5 Click Close to exit the installation process and close the wizard.

Confirm Server.INI Points to TaskRun (All OS)

This procedure provides instructions on how to ensure that the Server.ini file contains the correct value for the setting that Taskmaster Web uses to locate the TaskRun folder.

1 On the Server, start Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\server.ini file.

2 The server.ini's TempFolder= setting should be set to TempFolder=/TaskRun/ (folder name is case-sensitive) and if it is not, change it, save it, and close the file.

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Change SSL Setting in Server.INI (All OS)

If you are using Secure Socket Layer to encrypt communications between Taskmaster Web and Taskmaster Web Clients, this procedure provides instructions on how to change the value of the SSL setting in the Server.ini file that controls Taskmaster Web's SSL behavior.

1 On the Server, start Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\server.ini file.

2 Change the server.ini's UseSSL=0 setting to UseSSL=1, save it, and close the file.

Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

3 Close the TMS Configuration window.

Configure Taskmaster Web on Windows 2003, IIS 6 Server

This section provides the information you need to set up Taskmaster Web on a Windows 2003, IIS 6 Server so you can use the Taskmaster Web Client for processing.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

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1 From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Stopped, continue with the next step.
- Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.

3 Close the TMS Configuration window.

Add or Ensure Application Information in APPS.INI is Correct (All OS)

When you have installed an application separately (for example, Taskmaster 7.6 for Medical Claims), or have used the Datacap Studio Application Wizard to create or copy an application from a Workstation to the Server, and you want to access that application using the Taskmaster Web Client, you must ensure the application information in the APPS.INI file that is on the Server is complete and correct.

This procedure provides instructions on how to ensure the information is correct in and how to make all required changes to the APPS.INI file.

1 On the Server, start up Windows Explorer, navigate to and open the application's process folder so you can see the names of the application's databases.

2 On the Server, start up another instance of Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\apps.ini file.

3 Locate the section that contains information about the application (by default, apps.ini contains information about all of the applications shipped with Taskmaster).

4 To change information about an application that was copied to the Server, edit the application's section so that it reflects the correct:

- Application name (this is the name of the application folder on the Server)
- Server UNC name (without initial backslashes) or IP address
- Administration and Engine database names
- Paths to the various databases

5 To add information about a newly-created application, copy the entire section for an existing application (such as [APT]) and paste it below the original section but above the last line:

```
;;; End of Apps.ini entries - Do not remove this line.
```

and then edit the copied section so that it reflects the new application's:

- Application name (this is the name of the application folder on the Server)
- Server UNC name (without initial backslashes) or IP address
- Administration and Engine database names
- Paths to the various databases

6 Save the APPS.INI file, close the text editor, and close Windows Explorer.

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Add or Ensure Upload Limit Setting is Large Enough in web.config (All OS)

Depending on the usual size of the images that will be uploaded from the Taskmaster Web Client to the Server, you should adjust the upload limit setting found in the web.config file that is on the Server when the Server operating system is Windows 2000, Windows 2003, Vista, or Windows 2008.

This procedure provides instructions on how to locate and change the setting in the web.config file that affects upload speed.

1. On the Server, start Windows Explorer, navigate to and open the c:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad.
2. Within the <system.web> element, locate or add the **`<httpRuntime maxRequestLength="52428" />`** element - this parameter is expressed in kilobytes.
3. Depending on the usual size of the images that are being uploaded, you can increase the size, for example: **`<httpRuntime maxRequestLength="102400" />`**
4. When you have made changes, save and close the file.

Add or Ensure File Transfer Limit Setting is Large Enough (Windows 2003)

Depending on the usual size of the images that will be uploaded from the Taskmaster Web Client to the Server, you should adjust the default File Transfer Limit setting found in the METABASE.XML file that is on the Server.

This procedure provides instructions on how to locate and change the File Transfer Limit setting in the METABASE.XML file when the Server's operating system is Windows 2003.

1. Before editing the METABASE.XML file, enable the metabase edit-while-running feature using IIS Manager on the Server, otherwise you will not be able to save your changes. To do this: In IIS Manager, right-click the local computer, click Properties, select the Enable Direct Metabase Edit option, click Apply, then click OK.
2. On the Server, start Windows Explorer, navigate to and open the \windows\system32\inetsrv folder, scroll down to the metabase.xml file and open it in a text editor such as Notepad.
3. Locate and change the value (expressed in bytes) for **`AspMaxRequestEntityAllowed=`** for example, from **`204800`** to **`10238976`**.
4. When you have made changes, save and close the file.
5. After saving your changes, disable/clear the Direct Metabase Edit option in IIS Manager.

Create and Share (Nested) Virtual Directory for Taskmaster Web (Windows 2000, Windows 2003)

These instructions assume you will create a virtual directory for Taskmaster Web nested within the Server's Default Web Site.

This procedure provides instructions on how to create a virtual directory for the Taskmaster Web site.

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1 From the Server's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services. The Internet Information Services window opens.

2 Expand the computer on which you want to create the virtual directory, expand its Web Sites folder, right-click the Default Web Site, and on the shortcut menu, select New, then select Virtual Directory. The Welcome page of the Virtual Directory Creation Wizard opens.

3 Click Next. The Virtual Directory Alias page is displayed.

4 Enter tmweb.net as the alias, then click Next. The Web Site Content Directory page is displayed.

5 Enter the full path or use the Browse button to navigate to and select the c:\Datacap\tmweb.net folder, then click OK. The Web Site Content Directory page reappears with the full path to the tmweb.net folder displayed.

6 Click Next. The Access Permissions page is displayed.

7 Select the Read, Run scripts, and Execute options, then click Next. The completion page of the Virtual Directory Creation Wizard is displayed.

8 Click Finish. The Wizard closes and the new tmweb.net virtual directory is displayed in the Internet Information Services window.

Set Other Parameters for (Nested) Taskmaster Web Site (Windows 2003)

This procedure provides instructions on how to set additional parameters required by Taskmaster Web when Taskmaster Web is installed in a Windows 2003, IIS 6 environment.

1 From the Server's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services to open the Internet Information Services window.

2 Expand the computer, the Web Sites folder and the Default Web Site, right-click the tmweb.net web site, and select Properties from shortcut menu. The tmweb.net Properties dialog opens with the Virtual Directory tab displayed on top.

3 Click the Configuration button. The Application Configuration window opens.

4 Click the Options tab to display it.

5 Select the Enable session state option and set the Session timeout field to 20 minutes.

6 Select the Enable parent paths option, ensure or set the Default ASP language to VBScript, and set the ASP Script timeout field to 1200 seconds.

7 Click OK to close the Application Configuration window.

8 Click the Documents tab to display it.

9 If the default.aspx document is not displayed, add it and click Apply to save your change.

10 Click the ASP.NET tab to display it.

11 Click the Edit Configuration button. The ASP.NET Configuration Settings window opens with the General tab displayed on top.

12 Click the Application tab to display it.

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13 Set the Request execution timeout field to 1200 seconds, then click Apply.

14 Click State Management tab to display it.

15 Set the Session timeout field to 20 minutes, then click Apply.

16 Click OK to close the local Settings window.

17 Click OK to save and close the tmweb.net Properties dialog.

Set Web Site Isolation Mode (Windows 2003)

This procedure provides instructions on how to set the service to run in IIS 5.0 Isolation Mode on a Windows 2003 IIS 6 Server.

1 With the Internet Information Services window open, expand the computer on which you created the virtual directory, right-click Web Sites, and on the shortcut menu, select Properties. The Web Site Properties dialog opens.

2 Click the Service tab to display it.

3 Select Isolation Mode: Run WWW Service in IIS 5.0 Isolation Mode, click Apply and click Yes when you are prompted to restart IIS.

4 Click OK to close the Web Site Properties dialog.

Select Web Service Extensions (Windows 2003)

This procedure provides instructions on how to allow Active Server Page extensions on a Windows 2003 IIS 6 Server.

1 On the Server, with the Internet Information Services window open, expand the computer on which you created the virtual directory, and select Web Service Extensions. The Web Service Extension options are displayed in the right pane.

2 Select/ensure Active Server Pages, ASP.NET v2.0.50727, and Server Side includes are Allowed.

3 Close the Internet Information Services window.

Create TaskRun Folder, Set Up Web Sharing and Security Settings (Windows 2000, Windows 2003)

This procedure provides instructions on how to create the TaskRun processing folder on the Server that is required by Taskmaster Web. This folder is where batches temporarily reside while they are being processed.

IMPORTANT

The TaskRun folder name is **case-sensitive**, **must** be named TaskRun, and **must** be created within the c:\Datacap folder structure at the same level as the tmweb.net folder.

1 On the Server, start Windows Explorer, navigate to c:\Datacap, and create a folder named TaskRun. (Reminders: Folder name is case-sensitive; create this folder at the same level as the c:\Datacap\tmweb.net folder.)

2 In Windows Explorer, right-click the TaskRun folder, and select Properties from the shortcut menu. The TaskRun Properties dialog opens with the General tab displayed on top.

3 Click the Web Sharing tab to display it.

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4 Select the Share this folder option. The Edit Alias dialog opens displaying the folder name in the Alias field.

5 In the Application permissions group box, select the None option, and in the Access permissions group box, select Write in addition to the Read option, then click OK. The Web Sharing tab reappears with TaskRun displayed as an alias.

6 Click Apply to save your changes.

7 Click the Security tab to display it.

8 Add ASPNET Machine Account (Server\ASPNET) and set to allow Modify; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Modify.

9 Click OK to close the TaskRun Properties dialog.

Set Up TaskRun Virtual Folder (Windows 2000, Windows 2003)

This procedure provides instructions on how to set the appropriate IIS parameters for the TaskRun virtual folder required by Taskmaster Web.

1 From the Server's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services to open the Internet Information Services window.

2 Expand the computer, the Web Sites folder and the Default Web Site. If the virtual TaskRun folder is not displayed, refresh the window as many times as it takes for the TaskRun folder to appear.

3 Right-click the TaskRun folder, select Properties from the shortcut menu. The TaskRun Properties window opens with the Virtual Directory tab displayed on top.

4 Click the Remove button. The Application name field is protected, and the Remove button label changes to Create.

5 Click the Documents tab to display it.

6 If the default.aspx document is not displayed, add it and click Apply to save your change.

7 Click the Directory Security tab to display it.

8 Click the top Edit button to edit the Anonymous access and authentication control settings. The Authentication Methods dialog opens.

9 Select the Anonymous access checkbox and clear the Integrated Windows authentication checkbox, then click OK. The Authentication Methods dialog closes and the Directory Security tab is redisplayed.

10 Click the ASP.NET tab to display it.

- If the ASP.NET version displayed is version 2.0.5nnnn, continue with the next step.
- If the ASP.NET version displayed is blank but the field is active, click the dropdown arrow, select the 2.0.5nnnn entry from the list, and continue to the next step.
- If the ASP.NET version displayed is blank or earlier than 2.0.5nnnn and you cannot select the correct entry (the field is protected), you cannot continue with this procedure. To recover, ensure that you installed Taskmaster:

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- If you did not, begin this process over again with the correct version of the Taskmaster software.
- If you did, refer to Chapter 2 Installation and Configuration Prerequisites and follow the instructions to Run aspnet_regiis.exe to update the ASP.NET application script maps.

11 Click Apply to save any changes.

12 Click the HTTP Headers tab to display it.

13 Select the Enable Content Expiration option to activate the expiration fields.

14 Select the Expire Immediately option, then click Apply to save the change and then OK to close the TaskRun Properties dialog. The Internet Information Services window is redisplayed – the TaskRun folder's icon has changed.

Install Crystal Reports Runtime (All OS)

This procedure provides instructions on how to install the Crystal Reports Runtime files that are required by Taskmaster Web.

1 On the Server, start Windows Explorer, navigate to c:\Datacap\install\tmweb7cr, and double-click the Setup.exe.
When UAC is on, the User Account Control window opens. Click Continue.
The Welcome page of the Web Reports Setup wizard opens.

2 Click Next. The Select Installation Address page is displayed with default values in the Site and Virtual directory fields.

3 Change the Virtual directory to tmweb.net, then click Next. The Confirm Installation page is displayed.

4 Click Next. The Installing Web Reports page is displayed with progress messages and a progress indicator, and when complete, displays the Installation Complete window.

5 Click Close to exit the installation process and close the wizard.

Confirm Server.INI Points to TaskRun (All OS)

This procedure provides instructions on how to ensure that the Server.ini file contains the correct value for the setting that Taskmaster Web uses to locate the TaskRun folder.

1 On the Server, start Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\server.ini file.

2 The server.ini's TempFolder= setting should be set to TempFolder=/TaskRun/ (folder name is case-sensitive) and if it is not, change it, save it, and close the file.

Change SSL Setting in Server.INI (All OS)

If you are using Secure Socket Layer to encrypt communications between Taskmaster Web and Taskmaster Web Clients, this procedure provides instructions on how to change the value of the SSL setting in the Server.ini file that controls Taskmaster Web's SSL behavior.

1 On the Server, start Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\server.ini file.

2 Change the server.ini's UseSSL=0 setting to UseSSL=1, save it, and close the file.

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Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1. From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.
2. When the Status:
   - Shows as Running, continue with the next step.
   - Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

   If a Taskmaster Server Service error is displayed
   See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.
3. Close the TMS Configuration window.

Configure Taskmaster Web on Vista, Windows 2008, IIS 7 Server

This section provides the information you need to set up Taskmaster Web on either a Vista machine (which limits the number of users to five) or a Windows 2008, IIS 7 Server so you can use the Taskmaster Web Client for processing.

Prerequisites

1. Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.
2. Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration.
3. From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

1. From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.
2. When the Status:
   - Shows as Stopped, continue with the next step.
   - Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.
3. Close the TMS Configuration window.

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Add or Ensure Application Information in APPS.INI is Correct (All OS)

When you have installed an application separately (for example, Taskmaster 7.6 for Medical Claims), or have used the Datacap Studio Application Wizard to create or copy an application from a Workstation to the Server, and you want to access that application using the Taskmaster Web Client, you must ensure the application information in the APPS.INI file that is on the Server is complete and correct.

This procedure provides instructions on how to ensure the information is correct in and how to make all required changes to the APPS.INI file.

1. On the Server, start up Windows Explorer, navigate to and open the application's process folder so you can see the names of the application's databases.
2. On the Server, start up another instance of Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\apps.ini file.
3. Locate the section that contains information about the application (by default, apps.ini contains information about all of the applications shipped with Taskmaster).
4. To change information about an application that was copied to the Server, edit the application's section so that it reflects the correct:
   - Application name (this is the name of the application folder on the Server)
   - Server UNC name (without initial backslashes) or IP address
   - Administration and Engine database names
   - Paths to the various databases
5. To add information about a newly-created application, copy the entire section for an existing application (such as [APT]) and paste it below the original section but above the last line:

   ```
   ;;; End of Apps.ini entries - Do not remove this line.
   ```

   and then edit the copied section so that it reflects the new application's:
   - Application name (this is the name of the application folder on the Server)
   - Server UNC name (without initial backslashes) or IP address
   - Administration and Engine database names
   - Paths to the various databases
6. Save the APPS.INI file, close the text editor, and close Windows Explorer.

Add or Ensure Upload Limit Setting is Large Enough in web.config (All OS)

Depending on the usual size of the images that will be uploaded from the Taskmaster Web Client to the Server, you should adjust the upload limit setting found in the web.config file that is on the Server when the Server operating system is Windows 2000, Windows 2003, Vista, or Windows 2008.

This procedure provides instructions on how to locate and change the setting in the web.config file that affects upload speed.

1. On the Server, start Windows Explorer, navigate to and open the c:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad.
2. Within the <system.web> element, locate or add the **`<httpRuntime maxRequestLength="52428" />`** element - this parameter is expressed in kilobytes.

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3 Depending on the usual size of the images that are being uploaded, you can increase the size, for example:
```
<httpRuntime maxRequestLength="102400" />
```

4 When you have made changes, save and close the file.

Ensure Required IIS Components are Installed (Vista)

This procedure provides instructions on how to ensure that the appropriate components have been installed in Internet Information Services when the Server's operating system is Vista.

1 From the Server's Windows Start menu, select Control Panel, and on the Control Panel Home window, select Programs, and double-click Programs and Features. The Programs and Features window opens with a Tasks pane on the left.

2 In the Tasks pane, select Turn Windows features on or off.
When UAC is on, the User Account Control window opens. Click Continue.
The Windows Features window opens and displays a list of features.

3 Expand Internet Information Services, expand Web Management Tools, expand IIS 6 Management Compatibility, and select or ensure IIS Metabase and IIS 6 configuration compatibility is selected.

4 Scroll down and expand World Wide Web Services, expand Application Development Features, and select or ensure both ASP and ASP.NET are selected (selecting these options ensures other prerequisite features are selected).

5 Click OK to save your changes. Windows applies any changes you have made, then closes the Windows Features window.

6 Close the Programs and Features window.

Ensure Required IIS Components are Installed (Windows 2008)

This procedure provides instructions on how to ensure that the appropriate components have been installed in Internet Information Services when the Server's operating system is Windows 2008.

1 From the Server's Windows Start menu, select Control Panel, and on the Control Panel Home window, select Administrative Tools, and then select Server Manager. The Server Manager window opens.

2 In the Server Manager hierarchy pane, expand Roles, and then select Web Server (IIS). The Web Server (IIS) window opens.

3 In the Web Server (IIS) pane, scroll down to the Role Services section, and under Application Development, ensure the ASP.NET and ASP modules are installed (other modules will also be installed).

4 In the Web Server (IIS) pane, scroll down to the Management Tools section, and ensure IIS 6 Management Compatibility is installed and that under it, IIS Metabase Compatibility is installed.

5 Close the Server Manager window.

Set IIS ASP Request Size Limit (Vista, Windows 2008)

Depending on the usual size of the images that will be uploaded from the Taskmaster Web Client to the Server, you should adjust the default Maximum Requesting Entity Body Limit (maxRequestEntityAllowed).

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This procedure provides instructions on how to locate and change the Maximum Requesting Entity Body Limit when the operating system is Vista or Windows 2008.

1. From the Server's Windows Start menu, select Control Panel, and on the Control Panel Home window, click System and Maintenance. The System and Maintenance window opens.
2. Click Administrative Tools. The Administrative Tools window opens.
3. Double-click Internet Information Services.
   When UAC is on, the User Account Control window opens. Click Continue.
   The Internet Information Services (IIS) Manager window opens.
4. In the Connections pane, select the Server. The Server's Home pane is displayed.
5. In the Home pane, scroll down to the IIS area and double-click ASP.
   If ASP is not displayed, ensure it was installed, then restart IIS and the ASP icon should be displayed.
   The ASP properties pane is displayed.
6. In the Behavior section, expand Limits Properties. Additional properties are displayed.
7. Locate Maximum Requesting Entity Body Limit (maxRequestEntityAllowed), change the value (expressed in number of bytes) to reflect the appropriate size; for example, from 200000 (200 kb) to 10238976 (10MB), then tab out. The Apply button in the Actions pane is enabled.
8. In the Actions pane, click Apply. A message box indicates the change was saved.
9. Close the Internet Information Services (IIS) Manager window.

Create (Nested) Taskmaster Web Site (Vista, Windows 2008)

This procedure provides instructions on how to create the Taskmaster web site and set the parameters required by Taskmaster Web when Taskmaster Web is installed in a Vista or Windows 2008 IIS 7 environment.

1. From the Server's Windows Start menu, select Control Panel, and on the Control Panel Home window, click System and Maintenance. The System and Maintenance window opens.
2. Click Administrative Tools. The Administrative Tools window opens.
3. Double-click Internet Information Services.
   When UAC is on, the User Account Control window opens. Click Continue.
   The Internet Information Services (IIS) Manager window opens with a Connections pane on the left.
4. In the Connections pane, expand the computer on which the web site will reside, and expand Sites, right-click the Default Web Site, and select Add Application from shortcut menu. The Add Application dialog opens.
5. Select or enter the following on the Add Application dialog:
   - Alias: tmweb.net
   - Application pool: Classic .NET AppPool
   - Physical path: c:\Datacap\tmweb.net

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- When running on Windows 2008 x64 (64-Bit), also select Advanced Settings > Enable 32-Bit Applications and set to "True"

then click OK to save your settings, and OK to close the Add Application dialog.

6 In the Connections pane, click the Default Web Site, in the far right pane, expand Manage Web Site, and click the Configure Limits… link. The Edit Web Site Limits dialog opens.

7 Set the Connection Timeout field to 1200 (seconds), then click OK to save your change and close the Edit Web Site Limits dialog.

8 In the Connections pane, click the Default Web Site, in the middle Default Web Site Home pane, in the IIS section, double-click the HTTP Response Headers icon. The HTTP Response Headers pane opens.

9 In the far right pane, click the Set Common Headers link. The Set Common HTTP Response Headers dialog opens.

10 Select Expire Web content, select Immediately, then click OK to save your changes and close the Set Common HTTP Response Headers dialog.

11 Close the Internet Information Services (IIS) Manager window.

Create TaskRun Folder and Set Up Security (Vista, Windows 2008)

This procedure provides instructions on how to create the TaskRun processing folder required by Taskmaster Web. This folder is where batches temporarily reside while they are being processed.

IMPORTANT

The TaskRun folder name is **case-sensitive**, **must** be named TaskRun, and **must** be created within the c:\Datacap folder structure at the same level as the tmweb.net folder.

1 On the Server, start Windows Explorer, navigate to c:\Datacap, and create a folder named TaskRun. (Reminders: Folder name is case-sensitive; create this folder at the same level as the c:\Datacap\tmweb.net folder.)

2 In Windows Explorer, right-click the TaskRun folder, and select Properties from the shortcut menu. The TaskRun Properties dialog opens with the General tab displayed on top.

3 Click the Security tab to display it.

4 Add NETWORK SERVICE and set to allow Modify; add the local IUSR and set to allow Modify.

5 Click OK to close the TaskRun Properties dialog.

Set Up TaskRun Virtual Folder (Vista, Windows 2008)

This procedure provides instructions on how to set up the TaskRun virtual folder required by Taskmaster Web.

1 From the Server's Windows Start menu, select Control Panel, and on the Control Panel Home window, click System and Maintenance. The System and Maintenance window opens.

2 Click Administrative Tools. The Administrative Tools window opens.

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3 Double-click Internet Information Services.
When UAC is on, the User Account Control window opens. Click Continue.
The Internet Information Services (IIS) Manager window opens with a Connections pane on the left.

4 In the Connections pane, expand the computer on which the Taskmaster web site resides, and expand Sites, right-click the Default Web Site, and select Add Virtual Directory from shortcut menu. The Add Virtual Directory dialog opens.

5 Select or enter the following on the Add Virtual Directory dialog:

- Alias: TaskRun (case sensitive)
- Physical path: c:\Datacap\TaskRun (case sensitive)

then click OK to save your settings and close the Add Virtual Directory dialog.

Install Crystal Reports Runtime (All OS)

This procedure provides instructions on how to install the Crystal Reports Runtime files that are required by Taskmaster Web.

1 On the Server, start Windows Explorer, navigate to c:\Datacap\install\tmweb7cr, and double-click the Setup.exe.
When UAC is on, the User Account Control window opens. Click Continue.
The Welcome page of the Web Reports Setup wizard opens.

2 Click Next. The Select Installation Address page is displayed with default values in the Site and Virtual directory fields.

3 Change the Virtual directory to tmweb.net, then click Next. The Confirm Installation page is displayed.

4 Click Next. The Installing Web Reports page is displayed with progress messages and a progress indicator, and when complete, displays the Installation Complete window.

5 Click Close to exit the installation process and close the wizard.

Confirm Server.INI Points to TaskRun (All OS)

This procedure provides instructions on how to ensure that the Server.ini file contains the correct value for the setting that Taskmaster Web uses to locate the TaskRun folder.

1 On the Server, start Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\server.ini file.

2 The server.ini's TempFolder= setting should be set to TempFolder=/TaskRun/ (folder name is case-sensitive) and if it is not, change it, save it, and close the file.

Change SSL Setting in Server.INI (All OS)

If you are using Secure Socket Layer to encrypt communications between Taskmaster Web and Taskmaster Web Clients, this procedure provides instructions on how to change the value of the SSL setting in the Server.ini file that controls Taskmaster Web's SSL behavior.

1 On the Server, start Windows Explorer, navigate to and use a text editor such as Notepad to open the c:\Datacap\tmweb.net\server.ini file.

2 Change the server.ini's UseSSL=0 setting to UseSSL=1, save it, and close the file.

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Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

3 Close the TMS Configuration window.

Configure and Test Internet Explorer

Configure and Test Internet Explorer 6

This section provides the information you need to set up Internet Explorer 6 so you can use the Taskmaster Web Client for processing.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, to complete the Server configuration, and to configure Taskmaster Web on the Server.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Configure Internet Explorer 6

This procedure provides instructions on how to configure Internet Explorer 6 so it can communicate with Taskmaster Web.

Use these instructions to configure Internet Explorer 6 on any machine from which you want to run the Taskmaster Web Client, including: When you have all components installed on a single machine, on the Server itself for testing purposes in a client/server environment, and on each Workstation that will run Taskmaster Web Client in a client/server environment.

1 Start Internet Explorer 6 and display any web page.

2 On the Tools menu, select Internet Options. The Internet Options dialog opens with the General tab displayed on top.

3 Click the Security tab to display it.

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4 Select the Trusted Sites icon and click the Sites button to open the Trusted sites dialog.

5 Clear the Require server verification option.

6 Enter the URL of the Server as it is defined in your network's DNS (http://Server or https://Server) in the Add this website to the zone field, then click the Add button. The site is added to Websites pane.

7 Click OK or click Close. The Internet Options dialog reappears with the Security tab displayed on top.

8 Click the Custom level button. The Security Settings dialog appears.

9 Scroll down until the ActiveX controls and plug-ins settings are displayed.

10 The following settings should be Enabled – if an option is not enabled, select its Enable option :

- Download signed ActiveX controls
- Download unsigned ActiveX controls
- Initialize and script ActiveX controls not marked as safe for scripting

11 Click OK. A warning is displayed, asking you to confirm your change.

12 Click Yes. The Internet Options dialog reappears with the Security tab on top.

13 Click OK to close the Internet Options dialog.

Test Internet Explorer 6

This procedure provides instructions on how to test your configuration of Internet Explorer 6.

1 Start Internet Explorer 6.

2 Enter either the default IP address of the Taskmaster Server Service or the URL of the Server followed by the tmweb.net virtual directory and the test page (http://127.0.0.1/tmweb.net/ietest.aspx, http://Server/tmweb.net/ietest.aspx, or https://Server/tmweb.net/ietest.aspx). The IE Test page is displayed.

3 Click Test. The red Xs will change to green checkmarks when the test completes successfully.

Configure and Test Internet Explorer 7 or 8

This section provides the information you need to set up Internet Explorer 7 or 8 so you can use the Taskmaster Web Client for processing.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, to complete the Server configuration, and to configure Taskmaster Web on the Server.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster “admin” user.

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Configure Internet Explorer 7 or 8

This procedure provides instructions on how to configure Internet Explorer 7 or 8 so it can communicate with Taskmaster Web. You can configure Internet Explorer on the Server for testing purposes, and you must configure Internet Explorer on each Workstation that will run Taskmaster Web Client.

1. On the Server, start Internet Explorer 7 or 8 and display any web page.
2. On the Tools menu, select Internet Options. The Internet Options dialog opens with the General tab displayed on top.
3. Click the Security tab to display it.
4. Select the Trusted Sites icon and click the Sites button to open the Trusted sites dialog.
5. Clear the Require server verification option.
6. Enter either the default IP address of the Taskmaster Server Service (http://127.0.0.1), or the URL of the Server as it is defined in your network's DNS (http://Server or https://Server) in the Add this website to the zone field, then click the Add button. The site is added to the Websites pane.
7. Click Close. The Internet Options dialog reappears with the Security tab displayed on top.
8. Click the Custom level button. The Security Settings dialog appears.
9. Scroll down until the ActiveX controls and plug-ins settings are displayed.
10. The following settings should be Enabled – if an option is not enabled, select its Enable option :
    - Download signed ActiveX controls
    - Download unsigned ActiveX controls
    - Initialize and script ActiveX controls not marked as safe for scripting
11. Scroll down until the Miscellaneous setting are displayed.
12. Enable (or ensure it is enabled), the Include local directory path when uploading files to a server option.
13. Click OK. A warning is displayed, asking you to confirm your changes.
14. Click Yes. The Internet Options dialog reappears with the Security tab on top.
15. Click OK to close the Internet Options dialog.

Test Internet Explorer 7 or 8

This procedure provides instructions on how to test your configuration of Internet Explorer 7 or 8.

1. Start Internet Explorer.
2. Enter either the default IP address of the Taskmaster Server Service or the URL of the Server as it is defined in your network's DNS followed by the tmweb.net virtual directory and the test page (http://127.0.0.1/tmweb.net/ietest.aspx, or http://Server/tmweb.net/ietest.aspx, or https://Server/tmweb.net/ietest.aspx). When UAC is on, the User Account Control window opens. Click Continue as many

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times as necessary.
The IE Test page is displayed.

3 Click Test. The red Xs will change to green checkmarks when the test completes successfully.

Run APT Taskmaster Web Client Application

This section provides the information you need to run the Datacap Taskmaster foundation APT Taskmaster Web Client application "out of the box."

These instructions involve starting the Taskmaster Server Service, starting the Taskmaster Web Client, and running the default browser-based tasks to process pre-scanned images. This section also provides instructions for running Taskmaster Web Client reports.

Overview of APT Taskmaster Web Client

The default shortcuts you run, and the sequence in which you run them using the APT Taskmaster Web Client are as follows:

This shortcut	Allows you to
Scan	Process sample, pre-scanned images.
Upload	Move scanned images to the Taskmaster Server Service for further processing
Verify	Perform data validation.

NOTE

To complete processing, the APT Batch Profiler and Export tasks must be run manually from the APT Taskmaster Client (thick client). Or, in a client/server environment, the APT Batch Profiler and Export tasks can be run automatically as background tasks by either the Taskmaster Client Service or Datacap Rulerunner Quattro.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, to complete the Server configuration, to configure Taskmaster Web on the Server, and to configure Internet Explorer and test the connection to Taskmaster Web.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Start or Ensure Taskmaster Server Service is Started (Vista)

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started when the operating system is Vista.

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1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server.
When UAC is on, the User Account Control window is displayed - click Allow.
The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

3 Close the TMS Configuration window.

Confirm Scanner is Available to Taskmaster Web Client (Vista)

This procedure provides instructions on how to confirm your scanner is available to the Taskmaster Web Client when the Workstation's operating system is Vista.

Note: For running the Datacap sample or foundation applications, a physical scanner is not required as those applications can use the prescanned images included during installation.

1 From the Workstation's Windows Start menu, select Settings, select Control Panel, select Hardware and Sound, and double-click Scanners and Cameras. The Scanners and Cameras window opens.

2 When your scanner is listed in the Scanners and Cameras window, it is available to the Taskmaster Web Client.

Access Taskmaster Web Login Page and Login

This procedure provides instructions on how to login to the APT Taskmaster Web Client application using Internet Explorer.

’1 Open Internet Explorer, and enter the IP address of the Taskmaster Server Service followed by the alias you assigned to the website (for example: http://127.0.0.1/tmweb.net, http://Server/tmweb.net, or https://Server/tmweb.net). After a pause, the Taskmaster Login window is displayed.
NOTE: You may have to turn off Internet Explorer’s popup blocker the first time you display the Login page.

2 On the Taskmaster Web Login Page, enter the following:

Field	Value
Application	APT
User ID	admin
Password	password obtained from Datacap
Station	remote

3 Click Login. The APT Taskmaster Web Client main window opens with the Operations pane and Available shortcuts displayed.

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Run APT Taskmaster Web Client Scan Task

This procedure provides instructions on how to run the APT Taskmaster Web Client virtual scan task and begin processing the sample invoices.

1 On the Workstation, in the Operations pane, click the Scan shortcut. The list of available jobs is displayed.

2 Click the Web Demo shortcut. The Web Demo Scan page is displayed. The batch number assigned to this batch of documents is located in the upper left of the page. By default, the Multiple files option is selected.

3 In the lower right of the page, if necessary change the Scan Into path – this path indicates the location into which the pre-scanned images are temporarily placed.

4 Click Browse, navigate to the folder where the pre-scanned images are located (\\Server\Datacap\APT\images), select the first one, then click Open. The Web Demo Scan page is redisplayed with the path to the Source folder.

5 If you don't want to process all of the sample invoices (four single-page invoices and one two-page invoice), change the number in the Expected pages field to the number of images (not documents) you want to process, then click Scan. A window indicates that scanning is taking place. The pages are scanned, images of the pages are displayed, the batch-specific name of the folder is appended to the Scan Into path and an End of scan message is displayed.

6 Click OK. The message box closes.

7 The following table describes some of the things you can do on the Web Demo Scan dialog:

To	Do This
Change sequence of pages	Select either the image in the left pane, or the name of the image in the right page that you want to move, then click either the MoveUp or MoveDown arrow
Delete all pages	Click Remove All
Delete a single page	Select the image you want to delete, then click Remove
Enlarge scanned images	Click Zoom in
Shrink scanned images	Click Zoom out
Rotate an image	Click Rotate 90^0
Complete the Scan Task processing of the batch	Click Done
Cancel the Scan Task processing of the batch; deletes batch and all batch data from system	Click Cancel

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To	Do This
Put the batch on hold and end processing of the batch; batch remains available to same user	Click Hold

8 After all images have been scanned, click Done. A message box is displayed indicating the Batch finished with a status of finished.

9 Click OK. A message box asks if you want to continue processing.

10 Click Stop. The message box closes and the Operations pane is redisplayed.

11 When the Scan task finishes successfully, the source images have been collected into a batch and copied to the batch's uniquely-numbered folder found in the Scan Into folder.

12 Click the Monitor tab to view information about the batch. To refresh the information displayed, press F5. The Job, Task, and Status for this batch have been updated and are now Web Demo, Upload, *pending*.

Run APT Taskmaster Web Client Upload Task

This procedure provides instructions on how to run the APT Taskmaster Web Client upload task.

1 On the Workstation, in the Operations pane, click the Upload shortcut. The Upload window opens and A transferring the batch to server message is displayed briefly, then closes. A message box is displayed indicating the batch has finished with a status of finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click Stop. The message box closes and the Operations pane is redisplayed.

4 When the Upload task finishes successfully, the scanned images have been moved to the batch's uniquely-numbered folder found in \APT\batches on the Server and ivscan and upload xml files have been created.

5 Click the Monitor tab to view information about the batch. To refresh the information displayed, press F5. The Job, Task, and Status for this batch have been updated and are now Web Demo, Batch Profiler, *pending*.

Start APT Taskmaster Client

This procedure provides instructions on how to start the APT Taskmaster Client application. If you have logged into the Taskmaster Client before, the information you entered previously is displayed.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon (the target of this icon should be pointing to the local TMClient.exe with parameters pointing to the APTAdm.mdb and APTEng.mdb in the application's process folder on the \\Server). The Select Taskmaster Server dialog opens.

2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. A Please login window opens.

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3 Ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click OK.

4 The APT main window opens with the Operations pane displayed.

Run APT Taskmaster Client Batch Profiler Task (Background Shortcut) (Vista)

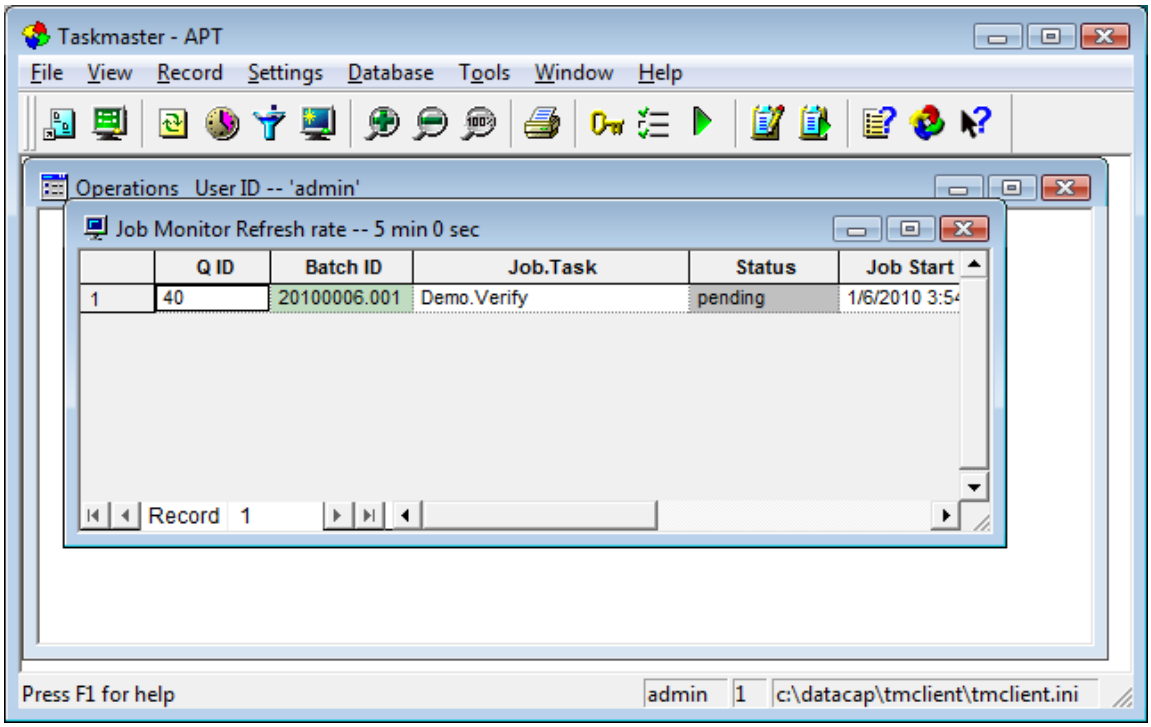
This procedure provides instructions on how to run the APT Taskmaster Client Batch Profiler task.

1 On the Workstation, in the Operations pane, double-click the Background shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. 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.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Batch Profiler task finishes successfully, the images have been organized into documents, copies (TIO) have been made of the original images, fingerprint (CCO) and page XML files have been created, along with a BatchProfiler.xml file in the batch's uniquely-numbered folder in \APT\batches (on the Server).

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Verify* and *pending*.



Run APT Taskmaster Web Client Verify Task

This procedure provides instructions on how to run the Taskmaster Web Client Verify task.

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1 On the Workstation, in the Operations pane, click the Verify shortcut. The verification panel opens with the first image displayed.

2 The following table describes some of the things you can do on the verification panel:

To	Do This
Move to the next data field	Press <Tab>
Move to the next low confidence character	Click Next LC
Fill empty field with data using Click N Key	Click in the empty data entry field, then do one of the following: Point at the field value on the image and click it, or, Click and drag the mouse to draw a rectangular box around the existing field data on the image
Complete processing of image and display next image	Click SuBmit
Mark the document for deletion, rescanning, or review	Select appropriate choice from Routing Instructions dropdown list
Display the first page of the next document in the batch without submitting or revalidating data	Click Next Page
Display the first page of the previous document in the batch without submitting or revalidating data	Click Previous Page
Display the first page, next page, previous page, or last page of the current document	Click the Page No |< > < or >| Browse button
Display the details of the first line item, next line item, previous line item or last line item	Click the Lineitem |< > < or >| Browse button
For all detail lines, locate all field values for all fields	Click Find Details
Calculate missing numeric values using existing values and automatically fill blank numeric fields	Click Calculate Blank
Move to the next problem document in the batch	Click Next Problem
Move to the previous problem document in the batch	Click Previous Problem

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To	Do This
Identify the type of invoice	Select from Invoice Type dropdown list
Display snippet associated with a field	Select Disp snip
Create new fingerprint for this invoice	Select Yes from Add New Fingerprint dropdown list
Put entire batch on hold	Click Hold
Override an error	Select Override

3 When you have finished with the last document and click SuBmit, a message box is displayed indicating all documents are complete.

4 Click OK. The message box closes and another message box is displayed indicating the task on the batch has finished with a status of finished.

5 Click OK. A message box asks if you want to continue processing.

6 Click No. The message box closes and the Operations pane is redisplayed.

7 When the Verify task finishes successfully, page XML files have been updated (for example, when low confidence characters have been changed during Verify), and a Verify.xml file has been created in the batch's uniquely-numbered folder found in \APT\batches on the Server.

8 Click the Monitor tab to view information about the batch. To refresh the information displayed, press F5. The Job, Task, and Status for this batch have been updated and are now Web Demo, Export, *pending*.

Run APT Taskmaster Client Export Task (Export Shortcut) (Vista)

This procedure provides instructions on how to run the APT Taskmaster Client Export task.

1 On the Workstation, in the Operations pane, double-click the Export shortcut. A Task Monitor window opens and a Rulerunner window opens displaying a progress bar, then they both close. A message box is displayed indicating that the Export task finished.

2 Click OK. A message box asks if you want to continue processing.

3 Click No. The message box closes and the Operations pane is redisplayed.
When the Export task finishes successfully:

- 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.
- An Export XML file has been added to the batch's uniquely-numbered folder found in \APT\batches (on the Server).
- 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

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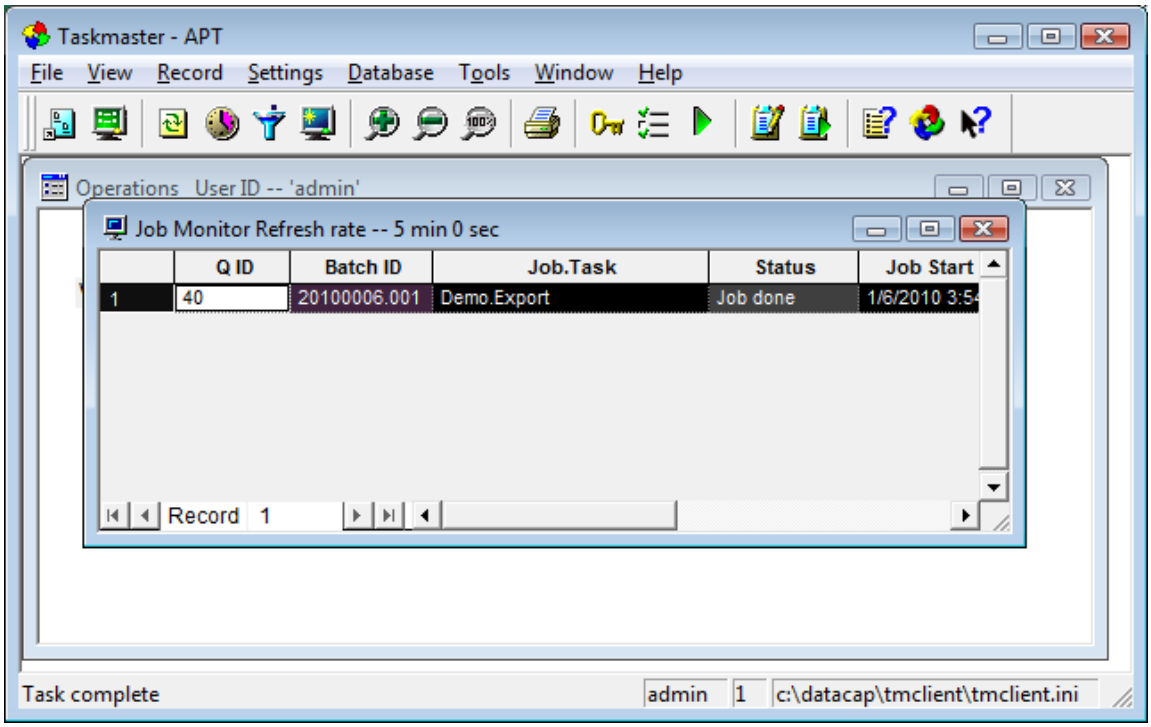
also sends the appropriate emails with the marked or deleted image attached as a PDF file. If you did not configure email notifications, the PDFs of the marked or deleted images stay in the batch's uniquely-numbered folder in \APT\batches (on the Server); the images and information about the images are not exported.

4 To refresh the information displayed in the Job Monitor window, click the Job Monitor's title bar and press F5. The Job.Task and Status for this batch have been updated and are now *Demo.Export* and *Job Done*.



Generate APT Taskmaster Web Client Reports Manually

This section provides the information you need to run the Datacap Taskmaster sample Taskmaster Web Client **APT** reports "out of the box."

Overview of APT Taskmaster Web Client Report Viewer

The Taskmaster Web Client APT Report Viewer is built into the Taskmaster Web Client and you access it from the Reports link on the Monitor pane.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, to complete the Server configuration, to configure Taskmaster Web on the Server, and to configure Internet Explorer and test the connection to Taskmaster Web.

3 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

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4 To view actual data on one or more reports, run one or more of the Taskmaster Client or Taskmaster Web Client **APT** tasks.

5 Ensure the Taskmaster Server Service is started.

Create Taskmaster Web Client Reports Manually

This procedure provides instructions on how to generate Taskmaster Web Client reports manually.

1 With the Taskmaster Web Client Operations window open, click Monitor. The Job Monitor window opens.

2 Click Reports to display the list of Available reports.

3 Select the report you want to generate. A Selected report details pane opens on the right. In the:

- Available filters portion of the dialog, select a filter (optional)
- Date portion of the dialog, make changes to indicate the time period to be included on the report

then click Show Report. The report is displayed.

4 Use the buttons and fields on the toolbar as follows:

To	Do This
Export data to PDF file	1 Click Export. The Export the Report window opens. 2 Select Acrobat Format (PDF) from the drop-down list. If you want to export a subset of the pages, select Pages and enter the From and To page numbers. 3 Click OK. The report pages are displayed in an Adobe Acrobat viewer window. 4 Click Save to save the report pages as a PDF file, or use the other buttons and fields on the toolbar as appropriate.

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To	Do This
Export data to DOC, XLS, or RTF file	1 Start the application (Microsoft Word, Microsoft Excel) into which you want to place the report data. 2 Switch back to the Taskmaster Web Client report window, and click Export. The Export the Report window opens. 3 Select the appropriate file format from the drop-down list. If you want to export a subset of the pages, select Pages and enter the From and To page numbers. 4 Click OK. The report pages are displayed in a viewer window. 5 Press <CTRL+ A> and then <CTRL + C> to select and copy the contents of the report pages to the Windows Clipboard. 6 Switch to the other application (Microsoft Word, Microsoft Excel) and press <CTRL + V> to paste the contents of the report into that application. 7 On the File menu, select Save As, then name and save the report in the application's file format.
Print report	1 Click Print. The Print the Report window opens. 2 If you want to print a subset of the pages, select Pages and enter the From and To page numbers. 3 Click OK. The report pages are displayed in an Adobe Acrobat viewer window. 4 Click Print. The Windows Print window opens. 5 Adjust the Windows Print controls as appropriate, then click OK to print the report pages. 6 Close the viewer window.
Show or Hide Group Tree	Click Show/Hide Group Tree.
Display first page of report	Click First.
Display previous page	Click Prev.
Display next page	Click Next.
Display last page of report	Click Last.
Display specific page	Enter a page number then click Go To.
Search for a string on the report	Enter the string you want to search for, then click Find. The string is highlighted on the report.

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To	Do This
Resize (enlarge or shrink) the report	Select the appropriate percentage from the drop-down list.
Close report and return to the list of Available reports	Click << Back to Reports Selection.

5 To close the report and return to the list of reports, click <<Back to Reports Selection. The list of Available reports is displayed.

6 Logoff the Taskmaster Web Client.

Run Datacap Studio Application

This section provides the information you need to run the Datacap Studio application. These instructions involve starting the Taskmaster Server Service, and starting Datacap Studio.

Prerequisites

1 Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.

2 Complete the instructions provided to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, and to complete the Server configuration.

2 From Datacap, obtain the password you need to use when logging in as the Taskmaster "admin" user.

Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

3 Close the TMS Configuration window.

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Start Up Datacap Studio

This procedure provides instructions on how to start up Datacap Studio.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Datacap Studio, and select Datacap Studio again. A Taskmaster Server dialog opens.
2. Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK, then click Next. A Connection progress bar is displayed briefly, then the Select Application - Rulerunner Service dialog opens.
3. Select the Work offline. Internal Rulerunner service option, then click Next. The Select Application – Applications dialog opens.
4. Select the appropriate application and click Next. A Connection Progress window is displayed briefly, then the Select Application – Taskmaster Login dialog opens.
5. Select the Taskmaster authentication option, and ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click Finish. The Datacap Studio main window opens with the Rulemanager tab displayed on top.

Set Up Schedule for Automatic APT Report Generation

This section provides the information you need to set up a schedule for automatically generating one or more APT Taskmaster Client reports.

Overview of Taskmaster Client Report Scheduling

To generate and print Taskmaster Client reports automatically, you must:

- Set up a report schedule
- Define the printer on which the reports are to be printed
- Leave Taskmaster Client Report Viewer running

Prerequisites

1. Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.
2. Complete the instructions to install and configure all of the components on the Server and the Workstation, to copy the application to the Server, to complete the Server configuration, to configure Taskmaster Web on the Server, and to configure Internet Explorer and test the connection to Taskmaster Web.
3. From Datacap, obtain the password you need to use when logging in as the Taskmaster “admin” user.
4. To view actual data on one or more reports, run one or more of the **APT** Taskmaster Client or Taskmaster Web Client tasks.
5. Exit the Taskmaster Client on the Workstation before starting Report Viewer on the Workstation.
6. The reports and custom filters you want to use must exist. For assistance with creating or customizing reports and filters, contact your Datacap Implementation Specialist.

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Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1. From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.
2. When the Status:
   - Shows as Running, continue with the next step.
   - Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

   If a Taskmaster Server Service error is displayed
   See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.
3. Close the TMS Configuration window.

Start Taskmaster Client Report Viewer

This procedure provides instructions on how to start up the Taskmaster Client Report Viewer. Exit the Taskmaster Client on the Workstation before starting Report Viewer on the Workstation.

Note that after the first time you log into Report Viewer, it remembers and displays what you entered the previous time.

1. From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Report Viewer icon. A Select Taskmaster Server dialog opens.
2. Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. The Report Viewer Login window is displayed.
3. Enter User ID of admin, enter the password provided by Datacap, and ensure the Station ID is set to 1, then click OK. The Report Viewer main window opens.

Set Up Taskmaster Client Report Schedule

This procedure provides instructions on how to set up a schedule for running Taskmaster Client reports automatically.

1. With the Report Viewer main window open, on the View menu, select Settings. The Settings dialog is displayed.
2. Select Run On StartUp (this ensures Report Viewer is started every time the Workstation is started), and select Run Schedule (this enables automated report scheduling), then click OK. The Settings dialog closes.
3. On the View menu, select Schedule. The Schedule dialog is displayed.
4. Click Add. A blank row is added to the Schedule dialog.

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5 Select Run, then click in each field and select, enter, or change the values that define how frequently the report runs, what time the report runs, which report is run, and which report filter is used when the report runs.

6 Repeat the previous step for each occurrence of each report that you want to schedule.

7 When you have added rows for each occurrence of each report that you want to generate, click OK. The Schedule dialog closes.

Define Report Printer

This procedure provides instructions on how to define the printer on which the reports are to be printed. A report must be displayed before you can define the printer; the report can be any report, and it does not have to contain data.

1 With the Report Viewer main window open, on the Report menu, select Open. The Open Report dialog is displayed with the Background Tasks report selected.

2 Click Open. The empty report is displayed.

3 On the Report menu, click Print Report. The Print Setup window opens.

4 Clear the No Printer checkbox and select the appropriate printer from the drop-down list, and adjust the other Windows Print controls as appropriate.

5 Click OK. The Windows Print window opens.

6 Click Cancel. The Windows Print window closes.

7 On the Report menu, click Close. The report window closes.

Produce Reports

Once the report schedule has been set up and the report printer has been defined, for reports to be produced automatically, the printer must be active, the Taskmaster Client Report Viewer must be running, and the Taskmaster Client must not be running on that machine during the report production schedule.

Install and Configure Taskmaster Client Service

All Taskmaster's Windows- or browser-based software tasks can be run manually. In addition, the Taskmaster Client Service can be configured to run tasks that do not require human intervention (background tasks) on a separate workstation or server. Depending on what you want to accomplish, and on your current Taskmaster application(s) and client/server environment, running the Taskmaster Client Service on a separate machine may offer significant processing advantages. Be sure to contact your Datacap Implementation Specialist or Support before configuring the Taskmaster Client Service.

This section provides the information you need to set up the Taskmaster Client Service on a separate, unattended workstation or server (referred to as the "TCSServer") to run one application's background tasks automatically.

Optional instructions are also provided to configure the Taskmaster Client Service to use Windows Authentication rather than standard Taskmaster Authentication.

This section assumes that you have a working Taskmaster client/server environment with at least one Workstation and one Server.

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Overview of Taskmaster Client Service Set Up

To set up and use the Taskmaster Client Service to run background tasks, you must:

- Determine which Datacap application and tasks you want the Taskmaster Client Service to process
- Create a domain account for the Taskmaster Client Service
- Configure Taskmaster Server Service to Use Windows Authentication (optional)
- Start the Taskmaster Server Service
- Start the application's Taskmaster Client, add a group, user, and station for the Taskmaster Client Service to use, and identify which tasks in which jobs the Taskmaster Client Service is to run
- Install and configure the Taskmaster Client Service on the Taskmaster Client Service (TCSServer) server
- Test the Taskmaster Client Service
- Leave Taskmaster Client Service running

Prerequisites

1. Ensure you have met the prerequisites detailed in Chapter 2 Installation and Configuration Prerequisites.
2. Complete the instructions to install, configure, and test all components of your client/server Taskmaster system.
3. From Datacap, obtain the password you need to use when logging in as the Taskmaster “admin” user.
4. The Taskmaster workflow, jobs, and tasks that this Taskmaster Client Service is responsible for processing must already exist and must work when a user runs them manually from a Workstation.

Determine Which Datacap Application to Process

Before you set up the Taskmaster Client Service, you need to determine which Datacap application contains background tasks suitable for Taskmaster Client Service processing. Typically, these will be Rulerunner and export tasks, but can be any tasks that do not require human interaction.

Create or Ensure Account Exists for Taskmaster Client Service

Create or ensure a specific domain account exists for the Taskmaster Client Service.

If you are using Windows Authentication, ensure the Taskmaster Client Service account has been added to the appropriate Taskmaster-specific AD/LDAP security group or groups. For more information, see Configure Windows Authentication for Taskmaster.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

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1 From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Stopped, continue with the next step.
- Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.

3 Close the TMS Configuration window.

Configure Taskmaster Server Service to use Windows Authentication

This procedure provides instructions on how to configure Taskmaster Server Service to use Windows Authentication.

1 With the TMS Configuration window open, click the Taskmaster tab to display it.

2 Click Show advanced to display Advanced Settings.

3 Depending on the type of user lookup syntax your organization is using, enter one of the following strings in the LDAP template (requires restart) field. For:

- Native AD authentication, enter:
  `WinNT://<%domain%>/<%user%>`
- Typical LDAP authentication, enter:
  `LDAP://CN=<%user%>,CN=Users,DC=<%domain%>,dc=Com`

then click Save.

4 Click the Service tab to display it.

5 Click Start to start Taskmaster Server Service. A Starting Service message is displayed. The Status changes to Running when the service is started.

6 Close the TMS Configuration window.

Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

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3 Close the TMS Configuration window.

Start Taskmaster Client Application

This procedure provides instructions on how to start the Taskmaster Client for a Datacap application. If you have logged into the application's Taskmaster Client before, the information you entered previously is displayed.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select the application you want to start, and click the application's Client icon. The Select Taskmaster Server dialog opens

2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. A Please login window opens.

3 Enter your User ID, Password, and Station, then click OK.

4 The application's main window opens with the Operations pane displayed.

Add Group, User, and Station for Taskmaster Client Service

This procedure provides instructions on how to add a Taskmaster Client Service group, user, and station to your Taskmaster application so the Taskmaster Client Service group has the Permissions and Privileges it needs for processing.

If you are using Windows Authentication, see Configure Windows Authentication for Taskmaster for information on naming this group.

1 On the Workstation, with the application's main window open, on the Settings menu, select Groups. The Taskmaster Administrator dialog opens with the Groups tab displayed on top and the existing Groups listed in the left pane.

2 Click Add, and enter a Group ID and description for the Taskmaster Client Service Group, then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

3 Click OK to close the message box. The Privileges, Permissions, and Users pane is enabled.

4 Expand the Privileges branch, expand the Client(s) item, select Taskmaster Sub (Client Service), then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

5 Click OK to close the message box, and in the Permissions branch, clear the All option, and select the background tasks within every job that you want the Taskmaster Client Service to process (typically Rulerunner and export tasks, but can be any tasks that do not require human interaction), then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

6 If you are using Windows Authentication, skip to step 11, otherwise, click OK to close the message box, then click the Users tab to display it.

7 Click Add, and enter the User ID of the Taskmaster Client Service domain account, then click Set Password, and enter the password of the Taskmaster Client Service domain account, and then click OK and Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

8 Click OK to close the message box. The Privileges, Permissions, and Groups pane is enabled.

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9 In the Privileges branch, expand the Client(s) item, select Taskmaster Sub (Client Service), then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

10 Click OK to close the message box, then scroll down to the Groups branch, and, at a minimum, add the user to the Taskmaster Client Service group, then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

11 Click OK to close the message box and click the Stations tab to display it.

12 Click Add, and enter a Station ID and description for the Taskmaster Client Service station, then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

13 Click OK to close the message box, and in the Permissions branch, clear the All option, and select the background tasks within every job that you want this station to process, then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

14 Click OK to close the message box, then click Done to close the Taskmaster Administrator dialog.

Install Taskmaster Client on Taskmaster Client Service Machine

Follow the instructions in Installation Instructions for Workstation to install the Taskmaster Client component on the TCSServer, but do not configure it.

Ensure Taskmaster Client Service Machine's Registry Points to TMServer

Edit or ensure that the TCSServer's Windows registry RRS\locations\rrs key reflects the UNC name of the Taskmaster Server hosting the application you want the Taskmaster Client Service to process and the path to the \\Server\Datacap\RRS folder.

Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\.

Create System DSNs Required by Taskmaster Client Service

When you install the Taskmaster Client Service on the TCSServer so it can process an application's background tasks, when that application uses System DSNs to access databases (for example a fingerprint database or a lookup database), you must create those same System DSNs on the TCSServer so it can connect to the correct databases during processing.

This procedure provides instructions on how to identify an application's System DSNs and how to create the exact same System DSNs on the TCSServer.

1 On a Workstation on which the Taskmaster Client component has been installed and on which you have successfully run all of the application's tasks (this implies the correct System DSNs have already been set up on this Workstation), on the Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Data Sources (ODBC) to open the ODBC Data Source Administrator window.

2 Click the System DSN tab to display it. Existing data sources are listed, and you should be able to tell by the DSN names which DSNs are related to the application. The names should reflect the application name and the type of database, for example: APTFingerprint, APTLook, or ExpressRule.

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3 For each of the application's DSNs, make a note of the Driver, then select it, and click Configure. The ODBC Setup window for the driver opens.

4 Make an exact note of the Data Source Name (this is the name you must use on the TCSServer when you create the DSN) and then click the Select button. The Select Database window opens.

5 Use the information in this window to make a note of the full UNC path to the application's Process folder and the name of the database, then click Cancel to close the window.

6 Click Cancel to close the ODBC Setup window.

7 Repeat steps 3 - 6 for each DSN referenced in the application, then click OK to close the ODBC Data Source Administrator window.

8 Close the Administrative Tools window on the Workstation.

9 On the TCSServer's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Data Sources (ODBC) to open the ODBC Data Source Administrator window.

10 Click the System DSN tab to display it. Existing data source names and drivers are listed.

11 Click Add. The Create New Data Source window opens.

12 Scroll down and select the appropriate driver, then click Finish. The ODBC Setup window for the driver opens.

13 Enter the Data Source Name for the database referenced in the application, and a Description, then click Select. The Select Database window opens.

14 Navigate to the Process folder of the application on the Server, select the appropriate database and click OK. The ODBC Setup window is redisplayed with the database information displayed.

15 Click OK. The ODBC Setup window closes and the ODBC Data Source Administrator window is displayed with the newly created data source name.

16 Repeat steps 11 - 15 for each DSN referenced in the application, then click OK to close the ODBC Data Source Administrator window.

17 Close the Administrative Tools window on the TCSServer.

Grant Taskmaster Client Service Log On as a Service Right

This procedure provides instructions on how to ensure the domain account used by the Taskmaster Client Service has been granted the Log On as a Service right on the TCSServer (this allows the service to log on automatically when the TCSServer is restarted).

1 From the TCSServer's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, select Services, right-click Datacap Taskmaster Client Service and select Properties. The Datacap Taskmaster Client Service Properties dialog opens with the General tab displayed on top.

2 Click the Log On tab to display it, then select This account. The Browse button is enabled.

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3 Locate or enter the domain name, user name and password of the Taskmaster Client Service, and click Apply. A message is displayed confirming the user was granted the Log On as a Service right.

4 Click OK to close the message box, then close the Services window.

Add Taskmaster Client Service Account on Taskmaster Client Service Machine

Add the Taskmaster Client Service domain account to the TCSServer's Administrators group so that the account has local administrator rights on the machine.

If your corporate policy restricts Administrators group privileges, or precludes granting administrator rights to the Taskmaster Client Service, you must grant the Taskmaster Client Service account a number of permissions using DCOM Config.

On the TCSServer, in Administrative Tools > Component Services > Computers > My Computer > DCOM Config, change the following TaskMaster.RunTask properties on the Security tab:

- **Launch and Activation Permissions**: Select Customize, click Edit, add the Taskmaster Client Service account and allow Local Launch, Remote Launch, Local Activation, Remote Activation.
- **Access Permissions**: Select Customize, click Edit, add the Taskmaster Client Service account and allow Local Access and Remote Access.
- **Configuration Permissions**: Select Customize, click Edit, add the Taskmaster Client Service account and allow Full Control.

Set Up Datacap Folder Sharing for Taskmaster Client Service (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate Taskmaster Client Service sharing permissions for the Server's c:\Datacap folder when the Server's operating system is Vista or Windows 2008.

1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Properties. The Properties dialog opens with the General tab displayed.

2 Click the Sharing tab to display it, then click Advanced Sharing.
When UAC is on, the User Account Control window is displayed. Click Continue.
The Advanced Sharing dialog opens.

3 Click Share this Folder and keep Datacap as the Share name.

4 Click Permissions. The Permissions for Datacap dialog is displayed.

5 Add/ensure Domain/Windows User ID for Taskmaster Client Service is set to allow Full Control.

6 Click Apply, then OK to save your changes and close the Datacap Properties dialog.

Set Up Datacap Folder Sharing for Taskmaster Client Service (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate Taskmaster Client Service sharing permissions for the Server's c:\Datacap folder when the Server's operating system is Windows 2000 or Windows 2003.

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1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Properties. The Datacap Properties dialog opens with the General tab displayed.
2. On the Sharing tab, click Permissions. The Permissions for Datacap dialog is displayed.
3. Add/ensure Domain/Windows User ID for Taskmaster Client Service is set to allow Full Control.
4. Click Apply, then OK to save your changes and close the Datacap Properties dialog.

Set Up Security on Shared Folder for Taskmaster Client Service (All OS)

This procedure provides instructions on how to set up the appropriate Taskmaster Client Service security permissions for the Server's Datacap folder when the Server's operating system is Windows 2000, Windows 2003, Vista, or Windows 2008.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap folder and select Properties. The Datacap Properties dialog opens with the General tab displayed.
2. Click the Security tab to display it.
3. Add/ensure Domain/Windows User ID for Taskmaster Client Service is set to allow Read & Execute.
4. Click Apply, then OK to save your changes and close the Datacap Properties dialog.

Set Up Security on RRS\Libs\Application Folder for Taskmaster Client Service (All OS)

This procedure provides instructions on how to set up the appropriate Taskmaster Client Service security permissions at the application level on the Server when the Server's operating system is Windows 2000, Windows 2003, Vista, or Windows 2008.

Repeat these instructions for each c:\Datacap\RRS\Libs\Application folder on the Server - setting up these security permissions at this level allows you to grant Taskmaster Client Service access to specific applications.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\RRS\Libs\Application folder and select Properties. The application's Properties dialog opens with the General tab displayed.
2. Click the Security tab to display it.
3. Add/ensure Domain/Windows User ID for Taskmaster Client Service is set to allow Full Control.
4. Click Apply, then OK to save your changes and close the Properties dialog.

Set Up Security on Datacap\Application Folder for Taskmaster Client Service (All OS)

This procedure provides instructions on how to set up the appropriate Taskmaster Client Service security permissions at the application level on the Server when the Server's operating system is Windows 2000, Windows 2003, Vista, or Windows 2008.

Repeat these instructions for each c:\Datacap\Application folder on the Server - setting up these security permissions at this level allows you to grant Taskmaster Client Service access to specific applications.

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1 On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\Application folder and select Properties. The application's Properties dialog opens with the General tab displayed.

2 Click the Security tab to display it.

3 Add/ensure Domain/Windows User ID for Taskmaster Client Service is set to allow Full Control.

4 Click Apply, then OK to save your changes and close the Properties dialog.

Configure Taskmaster Client Service

This procedure provides instructions on how to configure the Taskmaster Client Service on the TCSServer so it processes background tasks for an application automatically.

1 From the TCSServer's Windows Start menu, select All Programs, select Datacap, select Taskmaster Client and click Taskmaster Client Service. The Taskmaster Client Service Settings window opens with the TM Sub tab displayed on top.

2 Confirm that the Taskmaster Client Service is Stopped.

3 Click the Taskmaster Server tab to display it and select the Explanations option at the bottom left to display more information.

4 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click Connect. The button label changes to Disconnect, and the Server name or IP address field is protected.

5 Click the Admin/Engine tab. The Admin database tab is displayed on top.

6 Select the appropriate Database type and click the Browse button to navigate to and select the application's Admin database on the Server hosting the application.

7 Click the Engine database tab.

8 Select the appropriate Database type and click the Browse button to navigate to and select the application's Eng database on the Server hosting the application.

9 Click Connect. The button label changes to Disconnect, and the information on both tabs is protected.

10 Click the Login tab to display it.

11 If you are using:

- Taskmaster authentication, select the Taskmaster Standard authentication option, enter the Taskmaster Client Service’s domain User ID, password and Station ID, then click Login.
- Windows Authentication, select the Windows authentication option, enter the Taskmaster Client Service’s Station ID, and then click Login.

The button label changes to Log off and the Login information is protected.

12 Click the Workflow:Job:Task tab to display it.

13 Expand the application's workflow, expand each of the Jobs within the workflow, then select or ensure the tasks in each job that this Taskmaster Client Service is responsible for running are selected. Choose only those tasks that do not require human intervention.

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14 Clear Stop on Abort, select Mixed queuing, clear Write to Debug, change the Sleep and Task Instances settings if appropriate, then click Save.

15 Click the Logging tab to display the System event log and Datacap log tabs.

16 If appropriate, change the logging settings on either or both tabs, and click Save.

17 Click the Taskmaster Server tab to display it, and click Disconnect. The button label changes to Connect.

18 Click the TM Sub tab to display it, and click Start. The Status changes to Running.

19 Click Close to close the Taskmaster Client Service Settings window.

20 From the Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Services to open the Services window.

21 Scroll down to the Datacap Taskmaster Client Service entry, select it, right-click, and select Properties from the shortcut menu. The Datacap Taskmaster Client Service Properties dialog is displayed with the General tab displayed on top.

22 Change the Startup Type to Automatic, click Apply to save your changes, then click OK to close the Datacap Taskmaster Client Service Properties dialog.

23 Close the Services window.

Test Taskmaster Client Service by Running Application

The way to test whether you have set up the Taskmaster Client Service correctly for your application is to start up your Taskmaster Client application and run the application's tasks that should trigger the Taskmaster Client Service.

For example, if you have an application with Scan, PageID and Recognition tasks, and you have set up the Taskmaster Client Service to automatically run the PageID and Recognition tasks, running a scan job should automatically trigger the Page ID and Recognition tasks. If results from these jobs show up in the application's Batches folder, you know you have set up the Taskmaster Client Service correctly.

Test Taskmaster Client Service and View Processing

Another method for testing your set up of the Taskmaster Client Service allows you to start and run the Taskmaster Client Service so that it displays processing dialogs as it processes batches. Since only one instance of the Taskmaster Client Service can run on a machine at a time, these instructions include stopping the service before starting it in display mode.

Stop or Ensure the Taskmaster Client Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Client Service is stopped on the TCSServer.

1 From the TCSServer's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, double-click Services, and scroll down to the Datacap Taskmaster Client Service entry.

2 When the Status:

- Is blank, the service is stopped. Continue with the next step.
- Shows as Started, click Stop the Service. A Stopping Service message is displayed. The Status changes to a blank when the service is stopped.

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3 Close the Services window.

View Taskmaster Client Service Processing

This procedure provides instructions on how to start and run the Taskmaster Client Service so that it displays processing dialogs as it processes batches.

1 From the TCSServer's Windows Start menu, select Run. The Run dialog opens.

2 Enter the following command line:

c:\Datacap\tmclient\tmsub.exe

then click OK to start the Taskmaster Client Service. After a brief delay, the Taskmaster Client Service icon appears in your system tray.

3 When you run the application's Scan task, processing dialogs appear briefly as each batch is processed.

4 Check the Batches and Export folders for results.

Stop Taskmaster Client Service when in Display Mode

This procedure provides instructions on how to stop the Taskmaster Client Service when it is running in display mode.

1 On the TCSServer, right-click the Taskmaster Client Service icon in the system tray, and from the shortcut menu, select Stop and Exit. A message box prompts you to confirm that you want to stop the service.

2 Click Yes. The message box closes, the Taskmaster Client Service stops after it has finished any current processing, and the icon is removed from your system tray.

Configure Windows Authentication for Taskmaster

This section provides the information you need to configure Taskmaster 7.5 or later to use either Windows Active Directory (AD) or any Lightweight Directory Access Protocol (LDAP) provider rather than maintaining individual users in Taskmaster itself and using Taskmaster authentication.

This section includes information related to your domain, Taskmaster-specific AD/LDAP security groups, domain/Windows accounts for Taskmaster users, as well as configuring Taskmaster Server Service to use Windows Authentication, adding a Taskmaster group to the application that has the exact same name as the AD/LDAP security group and domain, and updating all Taskmaster Client icons to use Windows Authentication.

No changes are required to your Taskmaster Web Client as it always attempts to use Windows Authentication first.

To set up Taskmaster Client Service using Windows Authentication, follow the instructions in Configure Taskmaster Client Service.

Overview of Taskmaster Windows Authentication Processing

Taskmaster Client, Taskmaster Web Client, and Taskmaster Client Service support enterprise management of users in groups using either native Active Directory (AD) or any Lightweight Directory Access Protocol (LDAP) provider. This feature replaces the “NT Authentication” method provided in earlier versions of Taskmaster.

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Once the components of Taskmaster 7.5 or later have been configured to use Windows Authentication and a user logs onto Windows with a Windows ID that exists in the AD/LDAP directory, when that same user logs onto Taskmaster, Taskmaster attempts to locate the user in the AD/LDAP directory.

If Taskmaster locates the user in the AD/LDAP directory, it retrieves a list of all of the domain groups that this user belongs to, and attempts to find a Taskmaster Group that matches an AD/LDAP Group.

If authentication fails, Taskmaster presents its standard login dialog and the user can log onto Taskmaster using Taskmaster authentication (which uses the user entries in the Taskmaster Administration database for authentication).

If a match is found, the user is authenticated and granted the permissions and privileges defined for the matching Taskmaster Group – limited by the permissions and privileges of the Station in use.

When the user belongs to other AD/LDAP Groups that also have corresponding Taskmaster groups, the user is granted the Taskmaster permissions and privileges of those groups as well.

Overview of Windows Authentication Configuration Process

The procedures in this section apply to Taskmaster 7.5 or later. The configuration process includes the following steps:

1 Create Domain, Security Groups, Domain Accounts

2 Configure Taskmaster Server Service to use Windows Authentication

3 Add Taskmaster Group to Application

4 Update Authentication Parameter in Taskmaster Client Application Shortcut

Create or Ensure Domain Exists

Create or ensure a domain exists in which Taskmaster-specific Active Directory (AD) or Lightweight Directory Access Protocol (LDAP) security groups can be created.

Ensure you know the exact spelling of the domain, as you will need it when you configure Taskmaster to use Windows Authentication.

Create or Ensure AD/LDAP Security Group Exists

Create or ensure at least one Taskmaster-specific AD/LDAP security group exists within the domain.

Depending on your Datacap applications, you can create separate groups to limit what your Taskmaster users can do in Taskmaster.

Create or Ensure Accounts Exist and are Part of Security Group

Create or ensure a domain/Windows account exists for each Taskmaster Client user and, optionally, for the Taskmaster Client Service, and ensure each account has been added to the appropriate Taskmaster-specific AD/LDAP security group or groups.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

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1 From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Stopped, continue with the next step.
- Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.

3 Close the TMS Configuration window.

Configure Taskmaster Server Service to use Windows Authentication

This procedure provides instructions on how to configure Taskmaster Server Service to use Windows Authentication.

1 With the TMS Configuration window open, click the Taskmaster tab to display it.

2 Click Show advanced to display Advanced Settings.

3 Depending on the type of user lookup syntax your organization is using, enter one of the following strings in the LDAP template (requires restart) field. For:

- Native AD authentication, enter:
  `WinNT://<%domain%>/<%user%>`
- Typical LDAP authentication, enter:
  `LDAP://CN=<%user%>,CN=Users,DC=<%domain%>,dc=Com`

then click Save.

4 Click the Service tab to display it.

5 Click Start to start Taskmaster Server Service. A Starting Service message is displayed. The Status changes to Running when the service is started.

6 Close the TMS Configuration window.

Ensure Workstation's Registry Points to TMServer

Edit or ensure that the Workstation's Windows registry RRS\locations\rrs key reflects the UNC name of the TMServer (rather than C:\) and the path to the \\Server\Datacap\RRS folder.

Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\

Start Taskmaster Client Application

This procedure provides instructions on how to start the Taskmaster Client for a Datacap application. If you have logged into the application's Taskmaster Client before, the information you entered previously is displayed.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select the application you want to start, and click the application's Client icon. The Select Taskmaster Server dialog opens

2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. A Please login window opens.

3 Enter your User ID, Password, and Station, then click OK.

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4 The application's main window opens with the Operations pane displayed.

Add Taskmaster Group to Application

This procedure provides instructions on how to add a Taskmaster group to your Taskmaster application to support your Windows Authentication configuration.

1 On the Workstation, with the application's main window open, on the Settings menu, select Groups. The Taskmaster Administrator dialog opens with the Groups tab displayed on top and the existing Groups listed in the left pane.

2 Click Add, and enter a Group ID that is a concatenation of:
--Your Taskmaster-specific security group name
--A dot
--The domain to which your Taskmaster-specific security group belongs.
For example, for a security group called TMUsers in the XYZ Company's domain, the Taskmaster Group ID would be:
`TMUsers.XYZ`

3 Click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

4 Click OK to close the message box. The Privileges, Permissions, and Users pane is enabled.

5 Since you are using this group to grant specific privileges to a specific group of Taskmaster Client users for this application, expand the Privileges branch and select the appropriate privileges, then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

6 Click OK to close the message box.

7 Since you are using this group to grant permissions to a specific group of Taskmaster Client users for this application, expand the Permissions branch and select the appropriate permissions, then click Apply. A message box indicates the new settings will apply after currently signed on users log off and log back on again.

8 Click OK to close the message box.

9 Click Apply, and then Done. The Taskmaster Administrator dialog closes.

10 Close the Taskmaster Client window. A message box prompts you to confirm you want to quit.

11 Click Yes. Taskmaster Client shuts down.

Update Authentication Parameter in Taskmaster Client Application Shortcut

In order to use Windows Authentication whenever a user starts the Taskmaster Client using an application shortcut, the shortcut's authentication parameter must be changed. Taskmaster Client application shortcuts can be located on the desktop, in the Datacap folder of shortcuts installed on the desktop, and in the Workstation's Windows Start menu. When shortcuts are first installed, they may or may not contain an authentication parameter.

This procedure provides instructions on how to change a Taskmaster Client shortcut so it contains the authentication parameter that indicates Windows Authentication should be used.

1 Right-click the appropriate Taskmaster Client shortcut and select Properties. The application's Client properties dialog opens with the contents of the Target field

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selected. The Admin and Engine database connection strings are both enclosed in quotes, for example (line breaks added for readability):

```
C:\Datacap\tmclient\tmclient.exe
-ad"PROVIDER=MSACCESS;DSN=C:\Datacap\1040ez\process\1040adm.mdb;CATALOG=;DBNTA=;"
-ed"PROVIDER=MSACCESS;DSN=C:\Datacap\1040ez\process\1040eng.mdb;CATALOG=;DBNTA=;"
```

2 Press <End> to move the cursor to the end of the Target field. There may or may not be an authentication parameter (either -tma or -nta).

a) If an authentication parameter appears, change it to or ensure it is -nta

b) If no authentication parameter appears, after the last closing quote, add a space, then -nta

The Target field should look like this (line breaks added for readability):

```
C:\Datacap\tmclient\tmclient.exe
-ad"PROVIDER=MSACCESS;DSN=C:\Datacap\1040ez\process\1040adm.mdb;CATALOG=;DBNTA=;"
-ed"PROVIDER=MSACCESS;DSN=C:\Datacap\1040ez\process\1040eng.mdb;CATALOG=;DBNTA=;"
-nta
```

3 Click Apply, then OK to close the Client properties dialog.

Configure Rulerunner as a Web Service

In addition to Taskmaster Rulerunner running locally, it can also be configured to run as a web service on a completely separate server (referred to as "RRServer"). Depending on what you want to accomplish and the configuration of your current Taskmaster client/server environment, running Rulerunner as a web service may or may not be advantageous. Be sure to contact your Datacap Implementation Specialist or Support before implementing Rulerunner running as a web service.

This section provides the information you need to install and configure Rulerunner as a web service on a Windows 2003 (IIS 6) Server in an existing, working Taskmaster 7.5 SP1 or later environment. This section assumes you are installing Rulerunner as a web service on a separate Server; that is, the Server is not running other Taskmaster components.

The Windows 2003 RRServer that hosts Rulerunner requires components that are installed when Taskmaster Client and Taskmaster Web or later components are installed (but not configured).

Overview of Rulerunner as a Web Service Installation

The installation and configuration process is made up of the following steps:

1 Ensure you have a working Taskmaster 7.5 SP1 or later environment where you have successfully processed batches through export and that your application works with Rulerunner running locally.

2 Use your Taskmaster installation media to install (but not configure) the Taskmaster Web and Taskmaster Client components on Windows 2003 RRServer

3 Configure Rulerunner as a web service on Windows 2003, RRServer

4 Configure the Taskmaster application to use Rulerunner as a web service

5 Test the application using Rulerunner running as a web service

While the installation package (Setup.exe) can be located anywhere (for example, on the RRServer's CD/DVD drive, on an accessible network drive), when run, the destination will be the physical hard drive of the machine from which you run the Setup.exe.

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Ensure Domain Account Exists for Rulerunner

Set up a specific domain account for Rulerunner running as a web service and give it the Log on as a service right.

Share Datacap Folder Set Sharing Permissions for Rulerunner

Depending on the operating system of the Server that is hosting the Datacap folder, follow the appropriate set of instructions in Configure Taskmaster on Server to set up the appropriate sharing permissions for the c:\Datacap folder. Note that other accounts have already been granted sharing permissions during the installation and configuration of Taskmaster.

Add/ensure Domain/Windows User ID of Rulerunner is set to allow Full Control.

Set Up Security on Shared Datacap Folder for Rulerunner

Depending on the operating system of the Server that is hosting the Datacap folder, follow the appropriate set of instructions in Configure Taskmaster on Server to set up the appropriate security for the c:\Datacap folder.

Add/ensure Domain/Windows User ID of Rulerunner is set to allow Read & Execute.

Set Up RRS Folder Account Permissions (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\RRS folder on the Server that is hosting the Datacap folder when the Server's operating system is Windows 2000 or Windows 2003. Note that accounts were granted security permissions during the installation and configuration of Taskmaster, and one or more may already be set up properly.

1. On the Server, start Windows Explorer, navigate to, right-click the c:\Datacap\RRS folder, and select Sharing and Security. The Sharing tab is displayed.
2. Click the Security tab to display it.
3. Add/ensure ASP.NET Machine Account (Server\ASPNET) and Internet Guest Account (Server\IUSR_SERVER) are set to allow Full Control; add/ensure Domain/Windows User ID of Rulerunner is set to allow Full Control.
4. Click Apply and then OK to save your changes and close the dialog.

Set Up RRS Folder Account Permissions (Vista, Windows 2008)

This procedure provides instructions on how to set up the appropriate security permissions for the c:\Datacap\RRS folder on the Server that is hosting the Datacap folder when the Server's operating system is Vista or Windows 2008. Note that accounts were granted security permissions during the installation and configuration of Taskmaster, and one or more may already be set up properly.

1. On the Server, start Windows Explorer, navigate to and right-click the c:\Datacap\RRS folder and select Properties. The Properties dialog opens with the General tab displayed.
2. Click the Security tab to display it, then click Edit.
   When UAC is on, the User Account Control window is displayed. Click Continue.
   The Permissions dialog opens.
3. Add/ensure NETWORK SERVICE and local IUSR are set to allow Full Control, add/ensure Domain/Windows User ID of Rulerunner is set to allow Full Control.

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4 Click Apply and then OK to save your changes and close the dialog.

Set Up Security on Batches Folder for Rulerunner (All OS)

This procedure provides instructions on how to set up the appropriate security for the c:\Datacap\Application\Batches folder on the Server that is hosting the Datacap folder when the Server's operating system is Windows 2000, Windows 2003, Vista, or Windows 2008. Note that accounts were granted security permissions during the installation and configuration of Taskmaster 7.6, and one or more may already be set up properly.

1 On the Server, start Windows Explorer, navigate to, right-click the c:\Datacap\Application\Batches folder (for example c:\Datacap\APT\Batches), and select Properties. The Properties dialog opens with the General tab displayed.

2 Click the Security tab to display it.

3 Add/ensure Domain/Windows User ID of Rulerunner is set to allow Full Control.

4 Click Apply and then OK to save your changes and close the dialog.

Set Up WRRS Folder Account Permissions for Rulerunner (Windows 2000, Windows 2003)

This procedure provides instructions on how to set up the appropriate security for the c:\Datacap\WRRS folder on the Server that is hosting the Datacap folder when the Server's operating system is Windows 2000, or Windows 2003. Note that accounts were granted security permissions during the installation and configuration of Taskmaster 7.6, and one or more may already be set up properly.

1 On the Server, start Windows Explorer, navigate to, right-click the c:\Datacap\WRRS folder, and select Sharing and Security . The Sharing tab is displayed.

2 Click the Security tab to display it.

3 Add/ensure ASP.NET Machine Account (Server\ASPNET) and add/ensure Internet Guest Account (Server\IUSR_SERVER) are set to allow Read & Execute; add/ensure Domain/Windows User ID of Rulerunner is set to allow Full Control.

4 Click Apply and then OK to save your changes and close the dialog.

Set Up WRRS Folder Account Permissions for Rulerunner (Vista and Windows 2008)

This procedure provides instructions on how to set up the appropriate security for the c:\Datacap\WRRS folder on the Server that is hosting the Datacap folder when the Server's operating system is Vista or Windows 2008. Note that accounts were granted security permissions during the installation and configuration of Taskmaster 7.6, and one or more may already be set up properly.

1 On the Server, start Windows Explorer, navigate to, right-click the c:\Datacap\WRRS folder, and select Properties . The Properties dialog opens with the General tab displayed.

2 Click the Security tab to display it, then click Edit.
When UAC is on, the User Account Control window is displayed. Click Continue.
The Permissions dialog opens.

3 Add/ensure NETWORK SERVICE and IUSR are set to allow Read & Execute, add/ensure Domain/Windows User ID of Rulerunner is set to allow Full Control.

4 Click Apply and then OK to save your changes and close the dialog.

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Update ASP.NET Process Identity in Machine.Config File (Windows 2003)

On the Windows 2003 RRServer that will host Rulerunner as a web service, update the machine.config file with Rulerunner's domain account information.

1. On the RRServer, use Windows Explorer to navigate to and use a text editor such as Notepad to open C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CONFIG\machine.config
2. Locate the line <system.web> and the next line starting with <processModel …
3. Add the following information to the <processModel line so that it reflects information for the Rulerunner domain account that you want to use:

   <processModel autoConfig="true" enable="true" userName="MYDOMAINRulerunner AccountName" password="RulerunnerAccountPassword"/>
4. Save the changes to machine.config and close the file.

Grant Rulerunner Access to IIS Metabase (Windows 2003)

On the Windows 2003 RRServer that will host Rulerunner running as a web service, grant Rulerunner's domain account access to the IIS metabase and other directories used by ASP.NET.

This procedure provides instructions on how to run Microsoft's ASP.NET IIS Registration Tool (version 2 of .NET Framework) with the grant access parameter (-ga) to grant the Rulerunner account access to the IIS metabase. For more information about the tool, search for "aspnet_regiis.exe" on the Microsoft website.

1. On the RRServer, from the Windows Start menu, select Run. The Run dialog opens.
2. In the Open field, type cmd, and click OK. A DOS command prompt window opens.
3. Locate the aspnet_regiis.exe (for example, from your C:\> prompt, type: dir aspnet_regiis.exe /s).
4. Run the aspnet_regiis.exe with the -ga parameter followed by the domain name, a backslash, then the Rulerunner account name;
   for example (no line breaks):
   C:\>C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe -ga DOMAIN\RulerunnerAccountName
   then press <ENTER>.
   A "Start granting… access" message is displayed, followed by a "Finished granting… access" message.
5. Close the DOS command prompt window.

Grant DCOProcessor Permissions to Rulerunner in DCOM Config (Windows 2003)

On the Windows 2003 RRServer that will host Rulerunner running as a web service, in Administrative Tools > Component Services > DCOM Config > DCOProcessor, add and grant Local Launch and Local Activation permissions to the Rulerunner account.

Ensure RRServer's Registry Points to TMServer

Edit or ensure that the RRServer's Windows registry RRS\locations\rrs key reflects the UNC name of the TMServer hosting the Datacap folder and the path to the \\Server\Datacap\RRS folder.

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Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\

Create and Share Virtual Directory for Rulerunner Running as Web Service (Windows 2003)

These instructions assume you will create a virtual directory for Rulerunner running as a web service nested within the RRServer's Default Web Site.

This procedure provides instructions on how to create a virtual directory for Rulerunner running as a web service.

1. On the RRServer's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services to open the Internet Information Services window.
2. Expand the computer on which you want to create the virtual directory, expand its Web Sites folder, right-click the Default Web Site, and on the shortcut menu, select New, then select Virtual Directory. The Welcome page of the Virtual Directory Creation Wizard opens.
3. Click Next. The Virtual Directory Alias page is displayed.
4. Enter RRS as the alias, then click Next. The Web Site Content Directory page is displayed.
5. Enter the full path of or use the Browse button to navigate to and select the c:\Datacap\WRRS folder, then click OK. The Web Site Content Directory page reappears with the full path to the WRRS folder displayed.
6. Click Next. The Access Permissions page is displayed.
7. Select the Read, Run scripts, and Execute options, then click Next. The completion page of the Virtual Directory Creation Wizard is displayed.
8. Click Finish. The Wizard closes and the new RRS virtual directory is displayed in the Internet Information Services window.
9. Right-click RRS, select Properties from the shortcut menu. The RRS Properties window is displayed with the Virtual Directory tab on top.
10. Click the ASP.NET tab to display it and confirm the ASP.NET version is 2.0.nnnnn. If it is not, you cannot continue with this procedure. To recover, ensure that you installed Datacap Taskmaster:

- If you did not, begin this entire process over again with the correct version of the Taskmaster software.
- If you did, follow the instructions to Run aspnet_regiis.exe to update the ASP.NET application script maps.

11. Click OK to save the settings and close the RRS Properties window.

Set or Confirm Timeout Parameters for Rulerunner Running as Web Service (Windows 2003)

This procedure provides instructions on how to set or confirm the timeout parameters affecting Rulerunner running as a web service.

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1 From the RRServer's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Internet Information Services to open the Internet Information Services window.

2 Expand the computer, expand its Web Sites folder, expand its Default Web Site, right-click the RRS virtual directory, and select Properties from the shortcut menu. The RRS Properties dialog opens with the Virtual Directory tab displayed on top.

3 Click the Configuration button. The Application Configuration window opens.

4 Click the Options tab to display it.

5 Select or ensure the Enable session state option is selected and the Session timeout field is set to 20 minutes.

6 Select or ensure the Enable parent paths option is selected and the ASP Script timeout field is set to 1200 seconds.

7 Click Apply if you have made any changes

8 Click OK to close the Application Configuration window.

9 Click the ASP.NET tab to display it.

10 Click the Edit Configuration button. The ASP.NET Configuration Settings window opens with the General tab displayed on top.

11 Click the Application tab to display it.

12 Select or ensure the Request execution timeout field is set to 1200 seconds, then click Apply if you have made any changes.

13 Click State Management tab to display it.

14 Select or ensure the Session timeout field is set to 20 minutes, then click Apply if you have made any changes.

15 OK to save and close the RRS Properties dialog.

16 Close the Internet Information Services window.

Set Web Site Isolation Mode for Rulerunner (Windows 2003)

This procedure provides instructions on how to set the service to run in IIS 5.0 Isolation Mode on a Windows 2003IIS 6 Server.

1 On the RRServer, with the Internet Information Services window open, expand the computer on which you created the virtual directory, right-click Web Sites, and on the shortcut menu, select Properties. The Web Site Properties dialog opens.

2 Click the Service tab to display it.

3 Select Isolation Mode: Run WWW Service in IIS 5.0 Isolation Mode, and click OK. A message box related to restarting IIS is displayed.

4 Click Yes. The message box and Web Site Properties dialog close, and IIS is restarted.

Select Web Service Extensions for Rulerunner (Windows 2003)

This procedure provides instructions on how to allow the Active Server Page extensions on a Windows 2003 IIS 6 Server.

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1 On the RRServer, with the Internet Information Services window open, expand the computer on which you created the virtual directory, and select Web Service Extensions. The Web Service Extension options are displayed in the right pane.

2 Select/ensure Active Server Pages, ASP.NET v2.0.50727, and Server Side includes are Allowed.

Test Rulerunner Access to Virtual Directory

This procedure provides instructions on how to test that you have correctly configured Rulerunner running as a web service.

1 Open Internet Explorer, and enter the following: http://RRServerName/rrs/session.asmx

where:

- ServerName is either the default IP address or URL of the RRServer
- rrs is the alias you assigned to the WRRS folder

After a pause, a Session Web Service window is displayed.

2 Close the window.

Start or Ensure Taskmaster Server Service is Started

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

This procedure provides instructions on how to start or ensure the Datacap Taskmaster Server Service is started on the Server.

1 From the Server's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.

2 When the Status:

- Shows as Running, continue with the next step.
- Shows as Stopped, click Start. A Starting Service message is displayed. The Status changes to Running when the service is started.

If a Taskmaster Server Service error is displayed
See the instructions in **Configure Taskmaster on Server** to re-grant Taskmaster Server Service Log On as a Service Right.

3 Close the TMS Configuration window.

Start APT Taskmaster Client

This procedure provides instructions on how to start the APT Taskmaster Client application. If you have logged into the Taskmaster Client before, the information you entered previously is displayed.

1 From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select APT, and click the APT Client icon (the target of this icon should be pointing to the local TMClient.exe with parameters pointing to the APTAdm.mdb and APTEng.mdb in the application's process folder on the \\Server). The Select Taskmaster Server dialog opens.

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2 Enter the Server name (without initial backslashes) or IP address of the Server hosting the application and click OK. A Please login window opens.

3 Ensure the User ID is admin, enter the password provided by Datacap, and ensure the Station is set to 1, then click OK.

4 The APT main window opens with the Operations pane displayed.

Configure Taskmaster Application to Use Rulerunner as a Web Service

This procedure provides instructions on how to configure a Windows-based Taskmaster Client application to use Rulerunner running as a web service rather than the local Rulerunner. This procedure uses the Taskmaster 1040EZ application as an example.

1 With the application's main window open, on the Settings menu, select Workflow. The Taskmaster Administrator dialog opens with the Workflow tab displayed on top.

2 Select the Main Job to expand it.

3 Select the Recognize task, then click Setup. The Recognize Setup - Batch Pilot window opens.

4 Select the Rulerunner Web Service option, then click Done. The Recognize Setup - Batch Pilot window closes and the Taskmaster Administrator dialog reappears.

5 Click Apply.

Test Taskmaster Application Using Rulerunner as a Web Service

Once you have set up at least one task in the Taskmaster Client application to use Rulerunner running as a web service, create a batch and process it through that task. If the task completes successfully, open the application's batches folder, and open the log file associated with that task. The log file should contain a "RRS is REMOTE" entry that confirms the task used Rulerunner running as a web service.

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Chapter 5

Uninstall Taskmaster 7.6

This chapter provides the information you need to uninstall Taskmaster 7.6 software components.

Overview of Taskmaster 7.6 Uninstall Process

The procedures in this section apply only to uninstalling Taskmaster 7.6.

After you have stopped all of the Datacap Taskmaster 7.6 components that are running on the Workstations and Servers (for example Taskmaster Client, Taskmaster Client Service, Taskmaster Server Service), there are two ways you can uninstall Taskmaster components:

- Re-run Taskmaster 7.6 Setup.exe - You will be given the choice to Repair, Modify, or Remove
- Select Datacap Taskmaster 7.6 from Windows Control Panel > Administrative Tools > Add/Remove Programs - You will be prompted to Remove

The Taskmaster 7.6 uninstall process removes only those files that the previous Taskmaster 7.6 installation process created. This means that all files and settings that you created in Taskmaster 7.6 or that were changed by Taskmaster 7.6 processing are not removed automatically by the uninstall process, and, depending on whether the application is a sample application such as Survey or a customized application, you have the option of backing up, moving, or deleting what remains after the uninstall.

If you will be installing a newer version of Taskmaster 7.6 on the same machine in the same location, customized applications that were untouched by the uninstall process will not be changed by the later installation, but you must follow all applicable upgrade instructions (if any) provided with the newer version of Taskmaster for your custom application.

If you have created a new (custom) Taskmaster 7.6 application or customized a foundation application, and want to keep it, follow the instructions provided in these procedures:

- Ensure All Taskmaster Clients are Shut Down (Taskmaster Client and Taskmaster Web Client)
- Stop Taskmaster Server Service
- Stop Taskmaster Client Service
- Uninstall Taskmaster Components using Add or Remove Programs
- Create Backup Folder
- Backup Application
- Backup Application Shortcuts
- Backup System DSNs

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- Reboot after Uninstall

If you have run any Taskmaster 7.6 sample or foundation applications, and do not want to keep any applications, batches, export files or exported images, follow the instructions provided in these procedures:

- Ensure All Taskmaster Clients are Shut Down (Taskmaster Client and Taskmaster Web Client)
- Stop Taskmaster Server Service
- Stop Taskmaster Client Service
- Uninstall Taskmaster Components using Add or Remove Programs
- Delete Remaining Folders
- Reboot after Uninstall

If you have not run, altered, or created any Taskmaster 7.6 applications, follow the instructions provided in:

- Stop Taskmaster Server Service
- Stop Taskmaster Client Service
- Uninstall Taskmaster Components using Add or Remove Programs
- Reboot after Uninstall

Uninstall Instructions

Ensure All Taskmaster Clients are Shut Down

Before you begin uninstalling, ensure that all Taskmaster Client and Taskmaster Web Client users on all workstations are logged off.

Stop or Ensure Taskmaster Server Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Server Service is stopped on the Server.

1. From the Server's Windows Start menu, select Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server. The TMS Configuration window opens.
2. When the Status:
   - Shows as Stopped, continue with the next step.
   - Shows as Running, click Stop. A Stopping Service message is displayed. The Status changes to Stopped when the service is stopped.
3. Close the TMS Configuration window.

Stop or Ensure the Taskmaster Client Service is Stopped

This procedure provides instructions on how to stop or ensure the Datacap Taskmaster Client Service is stopped on the TCSServer.

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1 From the TCSServer's Windows Start menu, select Settings, select Control Panel, select Administrative Tools, double-click Services, and scroll down to the Datacap Taskmaster Client Service entry.

2 When the Status:

- Is blank, the service is stopped. Continue with the next step.
- Shows as Started, click Stop the Service. A Stopping Service message is displayed. The Status changes to a blank when the service is stopped.

3 Close the Services window.

Uninstall Datacap Taskmaster 7.6 using Add or Remove Programs

This procedure provides instructions on how to uninstall Taskmaster using the Windows Add or Remove Programs tool.

1 From the Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Add or Remove Programs. After a pause, the Add or Remove Programs window is displayed with a list of the software installed on the machine.

2 Scroll down to Datacap Taskmaster 7.6 and click Remove. A message box is displayed prompting you to confirm that you want to remove the software.

3 Click Yes. Windows displays a Preparing to Install... window followed by a Datacap Taskmaster 7.6 window and progress bar. When the uninstall process is finished, a Datacap Taskmaster 7.6 message box is displayed prompting you to reboot your system.

4 Depending on whether you want to backup your customized application or delete remaining files before you reboot your system, click either No or Yes. The message box closes.

Create Backup Folder

In Windows Explorer, navigate to a network location of your choice and create a folder for storing the backup copy of your customized application folders, shortcuts, and information about your application DSNs.

Backup Custom Application

This procedure provides instructions on how to make backups of folders that contain customizations you want to keep. Repeat these instructions to make copies of every customized application.

1 Using Windows Explorer, navigate to c:\Datacap\<application name> folder.

2 Delete the batches and export subfolders.

3 Copy the <application name> folder (including its process folder) to your backup folder.

4 Using Windows Explorer, navigate to c:\Datacap\RRS\Libs folder.

5 Copy the RRS\LIBS\<application> folder to your backup folder.

6 Delete the subfolders for applications you do not want to back up.

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Backup Application Shortcuts

This procedure provides instructions on how to make backup copies of Taskmaster shortcuts. Repeat these instructions to make copies of every shortcut associated with each of your customized applications.

For shortcuts located on the desktop:

1 Display your desktop, right-click the shortcut, and select Copy from the shortcut menu.

2 Using Windows Explorer, navigate to your backup folder and, if necessary, the appropriate subfolder.

3 Right-click in the folder and select Paste Shortcut from the shortcut menu.

For shortcuts located only on the Start menu:

1 Using Windows Explorer, navigate to C:\Documents and Settings\All Users\Start Menu\Programs, right click the Datacap folder and select Copy from the shortcut menu.

2 Using Windows Explorer, navigate to your backup folder and, if necessary, the appropriate subfolder.

3 Right-click in the folder and select Paste Shortcut from the shortcut menu.

Backup System DSNs

This procedure provides instructions on how to locate and record your Taskmaster System DSN information.

1 Open a new text file using a text editor such as Notepad.

2 From the Windows Start menu, select Settings, select Control Panel, select Administrative Tools, and double-click Data Sources (ODBC). The ODBC Data Source Administrator window opens with the User DSN tab displayed on top.

3 Click the System DSN tab to display it.

4 Select the DSN for the first Taskmaster database displayed, then click Configure. The ODBC Setup window opens.

5 Click Select to open the Select Database dialog and write down the type of Taskmaster database (Admin, Eng, etc.), the full path and file name of the database, then click Cancel. The Select Database dialog closes.

6 Click Cancel to close the ODBC Setup window.

7 Repeat the previous two steps each of the Taskmaster databases displayed on the ODBC Data Source Administrator's System DSN tab.

8 Click Cancel to close the ODBC Data Source Administrator window.

9 Save the text file with an appropriate name to your backup folder and, if necessary, the appropriate subfolder.

Delete Remaining Folders

This procedure provides instructions on how to locate and delete folders that were not removed by the uninstall process.

1 Using Windows Explorer, navigate to and delete the c:\Datacap folder. If access is denied, delete individual subfolders before deleting the c:\Datacap folder.

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2 If you processed batches using the Taskmaster Web Client, a Scan Into folder was used to temporarily hold images during scanning. If this folder was outside c:\Datacap, navigate to and delete the folder.

Reboot after Uninstall

After completing the Taskmaster uninstall process, reboot your machine.

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Appendix A

Vista Machine Setup Checklist

This Appendix provides a summary of the account and configuration settings that are required to run Datacap Taskmaster 7.6 server, web, and clients on a single Vista, IIS 7 machine with a single Domain/Windows user who has administrator rights on the machine.

The sections are sequenced deliberately, as some items in later sections depend on steps from the previous sections having been completed successfully.

Vista Machine Setup

Single Vista, IIS 7 Machine Prerequisites

On	Do This
Workstation	**Set Up Installer's User ID** Add/ensure Domain/Windows User ID of developer is in Workstation's Administrator group to allow developer to run InstallShield on Workstation Control Panel > User Accounts > User Accounts > Manage User Accounts
Workstation	**Install/Ensure IIS is Installed** If necessary, install IIS
Workstation	**Run Datacap InstallShield on Workstation** Install all components
Workstation	**Reboot**

Configure Taskmaster Server on Single Vista Machine

On	Do This
Workstation	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start Or, to start the service automatically on boot Control Panel > System and Maintenance > Admin Tools > Services > right-click Datacap Taskmaster Server Service > Properties > General tab > Startup Type of Automatic

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Run Taskmaster Client on Single Vista Machine

On	Do This
Workstation	**Install and Test Scanner** (Note: A physical scanner is not required for running the Datacap sample applications, as those applications can use the prescanned images included during installation.) Install scanner, ensure scanner works outside of Taskmaster.
Workstation	**Test Thick Client Sample Application** Sign on as Taskmaster user "admin" Run/test thick client and confirm each job in the workflow is processing correctly Exit Taskmaster Client.
Workstation	**Test Sample Application Report Viewer** Run/test thick Report Viewer client and view reports on the jobs that were run. Exit Report Viewer.
Workstation	**Review Default Installation (Users, Groups, Stations)**

Configure Taskmaster Web on Single Vista Workstation

On	Do This
Workstation	**Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop

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On	Do This
Workstation	**Increase MaxRequestLength** Windows Explorer navigate to and open using a text editor c:\Datacap\tmweb.net\web.config In <system.web>, locate and increase the **<httpRuntime maxRequestLength="52428" />** element - parameter expressed in kb, then save **Set IIS ASP Request Size Limit** Control Panel > System and Maintenance > Admin Tools > IIS > select computer > in Home pane, scroll down to the IIS area and double-click ASP. Behavior > Limits Properties > increase the Maximum Requesting Entity Body Limit (maxRequestEntityAllowed) - expressed in bytes, and apply **Create and Share Nested Taskmaster Web Site** Control Panel > System and Maintenance > Admin Tools > IIS In Connections pane, expand computer > expand Sites > right-click Default Web Site and select Add Application Alias: tmweb.net Application pool: Classic .NET AppPool Physical path: c:\Datacap\tmweb.net Save changes In Connections pane, click Default Web Site, expand Manage Web Site, click Configure Limits link, in Edit Web Site Limits dialog, set Connection Timeout = 1200 and save In Connections pane, click the Default Web Site, in the middle Default Web Site Home pane, in the IIS section, double-click the HTTP Response Headers icon, in the far right pane, click the Set Common Headers links, select Expire Web content, select Immediately, click OK to save changes
Workstation	**Create TaskRun Folder and Set Up Security** Folder name is **case-sensitive** and **must** be named TaskRun; folder **must** be created at the same level as the tmweb.net folder. In Windows Explorer, navigate to c:\Datacap and create a TaskRun folder. Right-click c:\Datacap\TaskRun > Properties > click Security tab Add NETWORK SERVICE and local IUSR and set to allow Modify

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On	Do This
Workstation	**Set Up TaskRun Virtual Folder** Control Panel > System and Maintenance > Admin Tools > IIS In Connections pane, expand computer > expand Sites > right-click Default Web Site, select Add Virtual Directory Alias: TaskRun Physical path: c:\Datacap\TaskRun Save changes
Workstation	**Install Crystal Reports Runtime** Run Crystal Reports runtime Setup.exe c:\Datacap\Install\tmweb7cr\setup.exe Set virtual directory to tmweb.net
Workstation	**Start Taskmaster Server Service** Start > Programs > Datacap > Taskmaster Server > Taskmaster Server > Start

Configure IE 7 and Run Taskmaster Web Client on Single Vista Machine

On	Do This
Workstation	**Confirm Scanner Available** (Note: A physical scanner is not required for running the Datacap sample applications, as those applications can use the prescanned images included during installation.) If scanner shows in Control Panel > Hardware and Sound > Scanners and Cameras, scanner is available to thin client.

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On	Do This
Workstation	**Configure IE 7** Start IE 7 Tools > Internet Options > General tab > Security tab > Select Trusted sites > Click Sites button > Trusted sites dialog On Trusted sites dialog, clear Require server verification, and add the default IP address of the Taskmaster Server (http://127.0.0.1) Security tab > Click Custom level button > Security settings dialog Enable: Download signed ActiveX controls Enable: Download unsigned ActiveX controls Enable: Initialize and script ActiveX controls not marked as safe for scripting Enable: Include local directory path when uploading files to a server Click OK and save changes
Workstation	**Test IE 7** To test your setup, run IE, and use the default IP address of the Taskmaster Server with the tmweb.net virtual directory and the test page to run the test setup - the URL will look like: http://127.0.0.1/tmweb.net/ietest.aspx
Workstation	**Run Thin Client** Start IE, and enter the URL (http://127.0.0.1/tmweb.net) Sign on as Taskmaster user "admin" Run/test thin client using the images found in the application's process folder, and confirm each job in the workflow is processing correctly (will have to switch back to thick client to run some jobs)
Workstation	**Run Thin Client Reports** Run/test thin client Report generation

Start Datacap Studio on Vista Machine

On	Do This
Workstation	**Start Datacap Studio** Start > All Programs > Datacap > Datacap Studio> Datacap Studio Server address: 127.0.0.1 Select Work Offline > Select APT > Login as admin.

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Appendix B

Client/Server Setup Checklist

This Appendix provides a summary of the account and configuration settings that are required to run Datacap Taskmaster 7.6 server, web, and clients in a client/server, Windows desktop and/or web-based environment for development, test, and production purposes.

The server ("Server") hosts the Taskmaster Server, the applications, batch files, and databases. For the Server, these instructions cover Vista (which limit the number of users to five), as well as Windows 2000, Windows 2003, and Windows 2008.

The workstation ("Workstation") hosts the thick clients (Taskmaster Client, Report Viewer, Datacap Studio, etc.) and the browser. For the Workstation, these instructions cover Vista.

An optional, separate server ("RRServer") hosts Rulerunner running as a web service. For RRServer, these instructions cover Windows 2003.

This Appendix also provides a summary of the account settings for five types of users: Developers with administrative rights on both Server and Workstation, the Taskmaster Server Service, Taskmaster Client Service, Rulerunner running as a web service, and end users.

The sections are sequenced deliberately, as some items in later sections depend on steps from the previous sections having been completed successfully.

Server Setup

Server Setup Prerequisites

On	Do This
Server	**Set Up Installer's User ID** Add/ensure Domain/Windows User ID of developer is in Server's Administrator group to allow developer to run InstallShield on Server
Server	**Install/Ensure IIS and .NET are Installed** If necessary: 1 Install IIS 2 Depending on operating system and sequence in which IIS and .NET were installed, run aspnet_regiis.exe

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Install Taskmaster Server and Taskmaster Web on Server

On	Do This
Server	**Run Datacap InstallShield** Install only Taskmaster Server and Taskmaster Web components
Server	**Win 2000 Server** 1 In Windows Explorer, navigate to the C:\Datacap\support\download directory, and open the readme.txt file. 2 Follow the instructions in the readme.txt file to install the appropriate scripting program.
Server	**Reboot**

Configure Taskmaster Server on Server

On	Do This
Server	**Ensure Domain/Windows Account Exists for Taskmaster Server Service** Ensure Domain/Windows account exists for Taskmaster Server Service **To start Taskmaster Server Service automatically on boot** Control Panel > (System and Maintenance) > Admin Tools > Services > Right-click Datacap Taskmaster Server Service > Properties > General tab > select Startup Type of Automatic **Grant Taskmaster Server Service Log On as a Service Right** Control Panel > (System and Maintenance) > Admin Tools > Services > right-click Datacap Taskmaster Server Service > Properties > Log On tab Select This Account and enter domain name, user name and password of the Taskmaster Server Service User you just set up, click Apply, returns message that user granted Log On as a Service right
Server	**Ensure Domain/Windows Accounts Exist for End Users**

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On	Do This
Server	**Vista, Windows 2008** **Share Datacap Folder and Set Up Sharing Permissions** Right-click c:\Datacap folder and select Properties Click Sharing tab, click Advanced Sharing Click Share this Folder (as Datacap) Click Permissions button 1 Add NETWORK SERVICE and local IUSR and allow Full Control 2 Add/ensure Domain/Windows User IDs of developers are set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control
Server	**Windows 2000, Windows 2003** **Share Datacap Folder and Set Up Sharing Permissions** Right-click c:\Datacap folder and select Sharing and Security Click Sharing tab, click Share this Folder (as Datacap) Click Permissions button 1 Add ASP.NET Machine Account (Server\ASPNET) and Internet Guest Account (Server\IUSR_SERVER) and set to allow Full Control 2 Add/ensure Domain/Windows User IDs of developers are set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control

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On	Do This
Server	**Vista, Windows 2008** **Share Datacap Folder and Set Up Sharing Permissions** Right-click c:\Datacap folder and select Properties Click Sharing tab, click Advanced Sharing Click Share this Folder (as Datacap) Click Permissions button 1 Add NETWORK SERVICE and local IUSR and set to allow Full Control 2 Add/ensure Domain/Windows User IDs of developers are set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control
Server	**Set Up Security on Shared Folder (Vista, Windows 2008)** Right-click c:\Datacap folder and select Properties Click Security tab 1 Add/ensure Domain/Windows User IDs of developers who can change existing Taskmaster applications are set to allow Read & Execute (this developer cannot create new applications) 2 Add/ensure Domain/Windows User IDs of developers who can create new Taskmaster applications in the c:\Datacap folder are set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Read & Execute 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Read & Execute

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On	Do This
Server	**Set Up Security on Shared Folder (Windows 2000, Windows 2003)** Right-click c:\Datacap folder and select Sharing and Security Click Security tab 1 Add/ensure Domain/Windows User IDs of developers who can change existing Taskmaster applications are set to allow Read & Execute (this developer cannot create new applications) 2 Add/ensure Domain/Windows User IDs of developers who can create new Taskmaster applications in the c:\Datacap folder are set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Read & Execute 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Read & Execute
Server	**Edit Server's Registry** Edit the Server's Windows registry so it reflects the UNC name of Server (rather than C:\) and path to the \\Server\Datacap\RRS folder Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start

Workstation Setup

Workstation Setup Prerequisites

On	Do This
Workstation	**Set Up Installer's User ID** Add/ensure Domain/Windows User ID of developer is in Workstation's Administrator group to allow developer to run InstallShield on Workstation (developer also has admin rights on Server)
Workstation	**Set up Domain/Windows User Account for End Users**

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On	Do This
Workstation	**Install and Test Scanner** (Note: A physical scanner is not required for running the Datacap sample applications, as those applications can use the prescanned images included during installation.) Install scanner, ensure scanner works outside of Taskmaster.

Install Taskmaster Client on Workstation

On	Do This
Workstation	**Run Datacap InstallShield** Log into Windows as developer/administrator, and run InstallShield, install Taskmaster Client, Support, and Documentation
Workstation	**Reboot**

Datacap Application Copy Wizard

Prepare to Copy Application to Server

Skip these steps if you have not ever run the application.

On	Do This
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start
Workstation	**Delete All Batches from Application on Workstation** Start Taskmaster Client application that you are going to copy Use Job Monitor to delete all existing batches and data from the Engine database.

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Copy Application to Server

On	Do This
Workstation	**Copy Sample Application to Server** Log into Windows as developer/administrator, run DStudio, cancel without connecting to Server, use Copy Wizard to copy application from Workstation to Datacap shared folder on Server (\\Server\Datacap) using SAME APPLICATION NAME: Source RRS Application Library folder - Location on the Workstation of the source application's \RRS\Libs\AppName folder (c:\Datacap\RRS\Libs\APT) Libraries folder on target system - Location of the application's \RRS\Libs folder on the Server (\\Server\Datacap\RRS\Libs) Root folder on target system - Location where the new application folder will be created on the Server (\\Server\Datacap) Taskmaster folder on target system - Location where the Taskmaster Client software is installed on the Workstations (c:\Datacap) TMWeb.Net Folder path - Location of the tmweb.net folder on the Server (\\Server\Datacap\tmweb.net) Click to open View Logs (found in \\Server\Datacap\APT) and search for errors and warnings that you need to fix
Workstation	**Edit Workstation's Registry** Edit the Workstation's Windows registry so it reflects UNC of Server and path to the \\Server\Datacap\RRS\ folder Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\

Complete Server Configuration

Set Security Permissions

On	Do This
Server	**Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop
Server	**Vista, Windows 2008** **Set Up Security on RRS\Libs Folder** Right-click c:\Datacap\RRS\Libs folder and select Properties Click Security tab Add NETWORK SERVICE and local IUSR and set to allow Read & Execute

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On	Do This
Server	**Windows 2000, Windows 2003** **Set Up Security on RRS\Libs Folder** Right-click c:\Datacap\RRS\Libs folder and select Sharing and Security On Security tab Add ASP.NET Machine Account (Server\ASPNET) and add Internet Guest Account (Server\IUSR_SERVER) and set to allow Read & Execute
Server	**Set Up Security on RRS\Libs\Application Folder (All OS)** Repeat these instructions for each Datacap RRS\Libs\Application folder - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users. Right-click c:\Datacap\RRS\Libs\Application folder and select Properties Click Security tab 1 Add/ensure Domain/Windows User ID of developer is set to allow Full Control 2 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control 3 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control
Server	**Vista, Windows 2008** **Set Up Security on Datacap\Application Folder** Repeat these instructions for each c:\Datacap\Application folder - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users. Right-click c:\Datacap\Application folder and select Properties Click Security tab 1 Add NETWORK SERVICE and local IUSR are set to allow Full Control 2 Add/ensure Domain/Windows User ID of developer is set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control

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On	Do This
Server	**Windows 2000, Windows 2003** **Set Up Security on Datacap\Application Folder** Repeat these instructions for each Datacap Application folder - setting up these security permissions at this level allows you to grant access to different applications to specific developers and end users. Right-click c:\Datacap\Application folder and select Sharing and Security On Security tab 1 Add ASP.NET Machine Account (Server\ASPNET) and Internet Guest Account (Server\IUSR_SERVER) and set to allow Full Control 2 Add/ensure Domain/Windows User ID of developer is set to allow Full Control 3 Add/ensure Domain/Windows User ID of Taskmaster Server Service is set to allow Full Control 4 When Batches folders are staying on Server in c:\Datacap\Application path, add/ensure Domain/Windows User IDs of Taskmaster end users are set to allow Full Control
Workstation	**Create System DSNs on Workstations when necessary**

Run Taskmaster Client on Workstation

On	Do This
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start
Workstation	**Test Thick Client Application** Log into Windows as end user Start the application by clicking the Taskmaster Client shortcut that points to the application files on the Server (shortcut on Start menu was updated, shortcut was created on desktop and on Server in new application's folder) Sign on as Taskmaster user "admin" Run/test thick client and confirm each job in the workflow is processing correctly Exit client

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On	Do This
Workstation	**Test Sample Application Report Viewer** Edit the Report Viewer shortcut on the Start menu so it points to the rptview.ini file, and application's Admin and Engine databases on Server Run/test thick Report Viewer client and view reports on jobs that were run Exit Report Viewer
Workstation	**Optional: Review Default Installation (Users, Groups, Stations)**

Configure Taskmaster Web on Windows 2000, IIS 5 Server

On	Do This
Server	**Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop
Server	**Add or Ensure Application Information in APPS.INI is Correct** 1 On the Server, in Windows Explorer, navigate to and open the application's process folder (you need the names of the databases). 2 On the Server, in Windows Explorer, navigate to and open the c:\Datacap\tmweb.net\apps.ini file. 3 To change information about an application that was copied to the Server, edit the application's section to reflect the correct Application name, Server name, Administration and Engine database names, paths to the databases (all found in the application's process folder). 4 To add information about a newly-created application, copy the entire section for an existing application and paste it below the original section but above the last line: ;;; End of Apps.ini entries - Do not remove this line. Edit the copied section to reflect the new application's Application name, Server name, Administration and Engine database names, and the paths to the databases (all found in the copy's \process folder). 5 Save and close the APPS.INI file

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On	Do This
Server	**Add or Ensure Upload Limit Setting is Large Enough in web.config** 1 On the Server, in Windows Explorer, navigate to and open the C:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad. 2 Within the <system.web> element, locate or add the **`<httpRuntime maxRequestLength="52428" />`** element - this parameter is expressed in kilobytes. 3 Depending on the usual size of the images that are being uploaded, you can increase the size, for example: **`<httpRuntime maxRequestLength="102400" />`** 4 When you have made changes, save and close the file.
Server	**Create and Share (Nested) Virtual Directory for Taskmaster Web** Admin Tools > IIS > expand computer > expand Web Sites folder > right-click Default Web Site and select New > Virtual Directory > Alias: tmweb.net Web Site Content directory: c:\Datacap\tmweb.net folder Access Permissions: Read, Run scripts, Execute
Server	**Create TaskRun Folder, Set Up Web Sharing and Security Settings** Folder name is **case-sensitive** and **must** be named TaskRun; folder **must** be created at the same level as the tmweb.net folder. In Windows Explorer, navigate to c:\Datacap and create a TaskRun folder. Right-click c:\Datacap\TaskRun > Properties Web Sharing tab > Share this folder > TaskRun is alias > Application Permissions = None, and Access Permissions Write and Read, click Apply Security tab > Add ASP.NET Machine Account (Server\ASPNET) and set to allow Modify; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Modify

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On	Do This
Server	**Set Up TaskRun Virtual Folder** Admin Tools > IIS > expand computer, expand Web Sites, expand Default Web Site, right-click TaskRun folder > Properties Virtual Directory tab > click Remove button Documents tab > add/ensure default.aspx is displayed Directory Security tab > top Edit button > Authentication Methods > Select Anonymous access, clear Integrated Windows authentication, OK ASP.NET tab > confirm version HTTP Headers tab > Select Enable Content Expiration, select Expire Immediately, click Apply
Server	**Install Crystal Reports Runtime** Run Install Crystal Reports runtime: c:\Datacap\Install\tmweb7cr\setup.exe Set virtual directory to tmweb.net
Server	**Confirm Server.INI File Points to TaskRun** Using Notepad, open c:\Datacap\tmweb.net\server.ini and ensure TempFolder=/TaskRun/
Server	**Change Secure Socket Layer Setting in Server.INI** If using web site SSL, also do the following: Using Notepad, open c:\Datacatp\tmweb.net\server.ini and ensure UseSSL=1
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start
Server	**Configure and Test IE** See instructions below

Configure Taskmaster Web on Windows 2003, IIS 6 Server

On	Do This
Server	**Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop

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On	Do This
Server	**Add or Ensure Application Information in APPS.INI is Correct** 1 On the Server, in Windows Explorer, navigate to and open the application's process folder (you need the names of the databases). 2 On the Server, in Windows Explorer, navigate to and open the c:\Datacap\tmweb.net\apps.ini file. 3 To change information about an application that was copied to the Server, edit the application's section to reflect the correct Application name, Server name, Administration and Engine database names, paths to the databases (all found in the application's process folder). 4 To add information about a newly-created application, copy the entire section for an existing application and paste it below the original section but above the last line: ;;; End of Apps.ini entries - Do not remove this line. Edit the copied section to reflect the new application's Application name, Server name, Administration and Engine database names, and the paths to the databases (all found in the copy's \process folder). 5 Save and close the APPS.INI file
Server	**Add or Ensure Upload Limit Setting is Large Enough in web.config** 1 On the Server, in Windows Explorer, navigate to and open the C:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad. 2 Within the <system.web> element, locate or add the **`<httpRuntime maxRequestLength="52428" />`** element - this parameter is expressed in kilobytes. 3 Depending on the usual size of the images that are being uploaded, you can increase the size, for example: **`<httpRuntime maxRequestLength="102400" />`** 4 When you have made changes, save and close the file.
Server	**Add or Ensure File Transfer Limit Setting is Large Enough** 1 Enable metabase edit-while-running. 2 On the Server, in Windows Explorer, navigate to and open the \windows\system32\inetsvr folder, scroll down to the metabase.xml file and open it in a text editor such as Notepad. 3 Locate and change the value for **`AspMaxRequestEntityAllowed=`** from **`204800`** to **`10238976`** (or larger) 4 When you have made changes, save and close the file. 5 Disable metabase edit-while-running.

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On	Do This
Server	**Create and Share (Nested) Virtual Directory for Taskmaster Web** Admin Tools > IIS > expand computer > expand Web Sites folder > right-click Default Web Site and select New > Virtual Directory > Alias: tmweb.net Web Site Content directory: c:\Datacap\tmweb.net folder Access Permissions: Read, Run scripts, Execute
Server	**Set Other Parameters for (Nested) Taskmaster Web Site** Admin Tools > IIS > expand computer, expand Web Sites, expand Default Web Site, right-click tmweb.net web site > Properties Virtual Directory tab > click Configuration button > Application Configuration > Options tab > Select Enable session state, Timeout = 20, select Enable parent paths, Default ASP Language = VBScript, ASP Script timeout = 1200 Documents tab > add/ensure default.aspx is displayed ASP.NET tab > click Edit Global Configuration button > General tab Application tab > Request execution timeout > 1200 State Management tab > Session timeout = 20 ASP.NET tab > click Edit Configuration button > General tab Application tab > Request execution timeout > 1200 State Management tab > Session timeout = 20
Server	**Set Web Site Isolation Mode** Admin Tools > IIS > expand computer > Right-click Web Sites >Web Site Properties > Service tab, select WWW Isolation Mode: Run Service in IIS 5.0 Isolation Mode.
Server	**Select Web Service Extensions** Admin Tools > IIS > expand computer > click Web Service Extensions Select/ensure Active Server Pages, ASP.NET v2.0.50727, and Server Side Includes are Allowed.

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On	Do This
Server	**Create TaskRun Folder, Set Up Web Sharing and Security Settings** Folder name is **case-sensitive** and **must** be named TaskRun; folder **must** be created at the same level as the tmweb.net folder. In Windows Explorer, navigate to c:\Datacap and create a TaskRun folder. Right-click c:\Datacap\TaskRun > Properties Web Sharing tab > Share this folder > TaskRun is alias > Application Permissions = None, and Access Permissions Write and Read Security tab > Add ASP.NET Machine Account (Server\ASPNET) and set to allow Modify; add Internet Guest Account (Server\IUSR_SERVER) and set to allow Modify
Server	**Set Up TaskRun Virtual Folder** Admin Tools > IIS > right-click TaskRun folder >Properties Virtual Directory tab > click Remove Documents tab > add/ensure default.aspx is displayed Directory Security tab > top Edit button > Authentication Methods > Select Anonymous access, clear Integrated Windows authentication, OK ASP.NET tab > confirm version HTTP Headers tab > Select Enable Content Expiration, select Expire Immediately, click Apply
Server	**Install Crystal Reports Runtime** Run Install Crystal Reports runtime: c:\Datacap\Install\tmweb7cr\setup.exe Set virtual directory to tmweb.net
Server	**Confirm Server.INI File Points to TaskRun** Using Notepad, open c:\Datacaptmweb.net\server.ini and ensure TempFolder=/TaskRun/
Server	**Change Secure Socket Layer Setting in Server.INI** If using web site SSL, also do the following: Using Notepad, open c:\Datacap\tmweb.net\server.ini and ensure UseSSL=1
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start

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On	Do This
Server	**Configure and Test IE** See instructions below

Configure Taskmaster Web on Vista, Windows 2008 IIS 7 Server

On	Do This
Server	**Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop
Server	**Add or Ensure Application Information in APPS.INI is Correct** 1 On the Server, in Windows Explorer, navigate to and open the application's process folder (you need the names of the databases). 2 On the Server, in Windows Explorer, navigate to and open the c:\Datacap\tmweb.net\apps.ini file. 3 To change information about an application that was copied to the Server, edit the application's section to reflect the correct Application name, Server name, Administration and Engine database names, paths to the databases (all found in the application's process folder). 4 To add information about a newly-created application, copy the entire section for an existing application and paste it below the original section but above the last line: ;;; End of Apps.ini entries - Do not remove this line. Edit the copied section to reflect the new application's Application name, Server name, Administration and Engine database names, and the paths to the databases (all found in the copy's \process folder). 5 Save and close the APPS.INI file
Server	**Add or Ensure Upload Limit Setting is Large Enough in web.config** 1 On the Server, in Windows Explorer, navigate to and open the C:\Datacap\tmweb.net folder, scroll down to the web.config file and open it in a text editor such as Notepad. 2 Within the <system.web> element, locate or add the **`<httpRuntime maxRequestLength="52428" />`** element - this parameter is expressed in kilobytes. 3 Depending on the usual size of the images that are being uploaded, you can increase the size, for example: **`<httpRuntime maxRequestLength="102400" />`** 4 When you have made changes, save and close the file.

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On	Do This
Server	**Vista** **Ensure Required IIS Components are Installed** Control Panel > double-click Programs and Features, and select Turn Windows features on or off Ensure/select Internet Information Services Settings: Under Internet Information Services > Web Management Tools > IIS 6 Management Compatibility, ensure/select IIS Metabase and IIS 6 configuration compatibility Under Internet Information Services > World Wide Web Services > Application Development Features, ensure/select both ASP and ASP.NET (selecting these automatically selects other prerequisite features) Click OK
Server	**Windows 2008** **Ensure Required IIS Components are Installed** Admin Tools > Server Manager Expand Roles, select Web Server (IIS) In Web Server (IIS) pane: Scroll down to Role Services, under Application Development ensure ASP.NET and ASP modules are installed Scroll down further to Management Tools, ensure IIS 6 Management Compatibility is installed, and under that, ensure/select IIS Metabase Compatibility is installed
Server	**Set IIS ASP Request Size Limit** Admin Tools > Internet Information Services (IIS) Manager Connections pane > Select the Server, in Server's Home pane, scroll down to the IIS area and double-click ASP ASP properties pane > Behavior section, expand Limits Properties. Locate Maximum Requesting Entity Body Limit (maxRequestEntityAllowed), increase value (increase size) Click Apply

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On	Do This
Server	**Create (Nested) Taskmaster Web Site** Admin Tools > Internet Information Services (IIS) Manager Connections pane > Expand the Server > expand Sites Right-click Default Web Site, select Add Application... and select or enter the following on the Add Application dialog: Alias: tmweb.net Application pool: Classic .NET AppPool Physical path: C:\Datacap\tmweb.net On 64-bit Windows 2008, also select Advanced Settings > Enable 32-Bit Applications, set to True Click OK Click Default Web Site, on Actions tab (far right) expand Manage Web Site, click Configure Limits... link and set Connection timeout (in seconds) to 1200, click OK Click Default Web Site, in middle Default Web Site Home pane, double-click HTTP Response Header icon, and on Actions tab (far right) click Set Common Headers…link and ensure the following are set: Expire Web content: Checked Immediately: Selected Click OK to save and close.
Server	**Create TaskRun Folder and Set Up Security** Folder name is **case-sensitive** and **must** be named TaskRun; folder **must** be created at the same level as the tmweb.net folder. In Windows Explorer, navigate to c:\Datacap and create a TaskRun folder. Right-click c:\Datacap\TaskRun > Properties Security tab > Add NETWORK SERVICE & local IUSR, and set to allow Modify
Server	**Set Up TaskRun Virtual Folder** Admin Tools > Internet Information Services (IIS) Manager Connections pane> Expand the Computer > expand Sites Right-click Default Web Site, select Add Virtual Directory... and select or enter the following on the Add Virtual Directory dialog: Alias: TaskRun Physical path: c:\Datacap\TaskRun (case sensitive)

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On	Do This
Server	**Install Crystal Reports Runtime** Install Crystal Reports runtime c:\Datacap\Install\tmweb7cr\setup.exe Site: Default Web Site Virtual directory: tmweb.net
Server	**Confirm Server.INI File Points to TaskRun** Using Notepad, open c:\Datacap\tmweb.net\server.ini and ensure TempFolder=/TaskRun/
Server	**Change Secure Socket Layer Setting in Server.INI** If using web site SSL, also do the following: Using Notepad, open c:\Datacap\tmweb.net\server.ini and ensure UseSSL=1
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start
Server	**Configure and Test IE** See instructions below

Configure Internet Explorer

Configure IE 6 on Workstation and Run Taskmaster Web Client

On	Do This
Workstation	**Confirm Scanner Available** (Note: A physical scanner is not required for running the Datacap sample applications, as those applications can use the prescanned images included during installation.) If scanner shows in Control Panel > Scanners and Cameras, scanner is available to thin client.

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On	Do This
Workstation	**Configure IE 6** Start IE 6 Tools > Internet Options > General tab > Temporary Internet files > Click Settings button> Settings dialog> Select: Every visit to the page, click OK Security tab > Select Trusted sites > Click Sites button > Trusted sites dialog On Trusted sites dialog, clear Require server verification, and add either the default IP address of the Taskmaster Server (http://127.0.0.1) or the URL of the Server as it is defined in your network's DNS (http://Server or https://Server), click OK. Security tab > Click Custom level button > Security settings dialog Enable: Download signed ActiveX controls Enable: Download unsigned ActiveX controls Enable: Initialize and script ActiveX controls not marked as safe for scripting Click OK to close Security settings dialog and Internet Options window
Workstation	**Test IE 6** To test your setup, run IE, and use either the default IP address of the Taskmaster Server or the URL of the Server with the tmweb.net virtual directory and the test page to run the test setup - the URL will look like: http://127.0.0.7/tmweb.net/ietest.aspx, http://Server/tmweb.net/ietest.aspx, or https://Server/tmweb.net/ietest.aspx
Workstation	**Run Thin Client** Start IE, and enter the appropriate Server URL (http://127.0.0.7/tmweb.net, http://Server/tmweb.net, or https://Server/tmweb.net). Sign on as Taskmaster user "admin" and Station "remote" Run/test thin client using the images on the Server in the application's images folder, and confirm each job in the workflow is processing correctly (you will have to switch back to thick client to run some jobs)
Workstation	**Run Thin Client Reports** Run/test thin client Report generation

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Configure IE 7 or 8 on Workstation and Run Taskmaster Web Client

On	Do This
Workstation	**Confirm Scanner Available** (Note: A physical scanner is not required for running the Datacap sample applications, as those applications can use the prescanned images included during installation.) If scanner shows in Control Panel > Scanners and Cameras, scanner is available to web client.
Workstation	**Configure IE 7 or 8 on Workstation** Start IE 7 or 8 Tools > Internet Options > General tab > Browsing history > click Settings button> Temporary Internet Files and History Settings dialog> Select: Every time I visit the webpage, click OK Security tab > Select Trusted sites > Click Sites button On Trusted sites dialog, clear Require server verification, and add either the default IP address of the Taskmaster Server (http://127.0.0.1) or the URL of the Server as it is defined in your network's DNS (http://Server or https://Server) click OK. Security tab > Click Custom level button > Security settings dialog - Trusted Sites Zone: Enable: Download signed ActiveX controls Enable: Download unsigned ActiveX controls Enable: Initialize and script ActiveX controls not marked as safe for scripting Scroll down to Miscellaneous settings > Enable Include local directory path when uploading files to a server, click OK. Close IE 7 or 8
Workstation	**Run Web Client** Start IE, and enter the appropriate Server URL (http://127.0.0.7/tmweb.net, http://Server/tmweb.net, or https://Server/tmweb.net). Sign on as Taskmaster user "admin" and Station "remote" Run/test thin client using the images on the Server in the application's images folder, and confirm each job in the workflow is processing correctly (you will have to switch back to thick client to run some jobs)
Workstation	Run/test thin client Report generation

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Configure Taskmaster Client Service

On	Do This
N/A	**Determine which Datacap Application, Tasks to Process**
Server	**Set up Domain/Windows User Account for Taskmaster Client Service**
Server	**Configure Taskmaster Server Service to use Windows Authentication (OPTIONAL - skip if not using Windows Authentication)** **Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop Click Taskmaster tab, click Show advanced Enter either native AD or typical LDAP user lookup string
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start
Workstation	**Add Group, User, Station for Taskmaster Client Service to Application** Start the application by clicking the Taskmaster Client shortcut that points to the application files on the Server Sign on as Taskmaster user "admin" Settings > Groups tab > click Add, add Group for Taskmaster Client Service (see Configure Windows Authentication for Taskmaster section for instructions on naming this group), and assign Privileges, Permissions Click Users tab > click Add, add User for Taskmaster Client Service and assign Privileges, and add to Group Click Stations tab > click Add, add Station for Taskmaster Client Service, and assign Permissions. Exit client
TCSServer	**Run Datacap InstallShield** Log into Windows as developer/administrator, and run InstallShield, install Taskmaster Client component
TCSServer	**Reboot**
TCSServer	**Edit TCSServer's Registry** Edit the TCSServer's Windows registry so it reflects UNC of Server and path to the \\Server\Datacap\RRS\ folder Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\

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On	Do This
Workstation	**Note System DSNs** Admin Tools > Data Sources > System DSN tab For each DSN used by application, note Driver, select DSN, click Configure, note Data Source Name, click Select, note the full UNC path
TCSServer	**Create Required System DSNs** Admin Tools > Data Sources > System DSN tab Click Add, select driver, click Finish, enter Data Source Name, click Select, navigate to the application's Process folder on the Server, select database, click OK, click OK. Repeat for each DSN required by the application
TCSServer	**Grant Taskmaster Client Service Log On as a Service Right** Control Panel > (System and Maintenance) > Admin Tools > Services > right-click Datacap Taskmaster Client Service > Properties > Log On tab Select This Account and enter domain name, user name and password of the Taskmaster Client Service User, click Apply, returns message that user granted Log On as a Service right
TCSServer	**Add Taskmaster Client Service Account on TCSServer** Add Taskmaster Client Service Account to TCSServer's Administrators group, or grant Taskmaster Client Service account permissions using DCOM Config: Admin Tools > Component Services > DCOM Config > change TaskMaster.RunTask properties on the Security tab: Launch and Activate: Add Taskmaster Client Service account and allow Local Launch, Remote Launch, Local Activation, Remote Activation Access Permissions: Add Taskmaster Client Service account and allow Local Access, Remote Access Configuration Permissions: Add Taskmaster Client Service account and allow Full Control
Server	**Vista, Windows 2008** **Set Up Datacap Folder Sharing for Taskmaster Client Service** Right-click c:\Datacap folder and select Properties Click Sharing tab, click Advanced Sharing, click Permissions, add Taskmaster Client Service account and set to allow Full Control

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On	Do This
Server	**Windows 2000, Windows 2003** **Set Up Datacap Folder Sharing for Taskmaster Client Service** Right-click c:\Datacap folder and select Sharing and Security Click Sharing tab, click Permissions, add Taskmaster Client Service account and set to allow Full Control
Server	**Set Up Security on Shared Folder for Taskmaster Client Service (All OS)** Right-click c:\Datacap folder and select Properties Click Security tab: Add Taskmaster Client Service account and set to allow Read & Execute
Server	**Set Up Security on RRS\Libs\Application Folder for Taskmaster Client Service (All OS)** Right-click c:\Datacap\RRS\Libs\Application and select Properties Click Security tab: Add Taskmaster Client Service account and set to allow Full Control
Server	**Set Up Security on Datacap\Application Folder for Taskmaster Client Service (All OS)** Right-click c:\Datacap\Application and select Properties Click Security tab: Add Taskmaster Client Service account and set to allow Full Control

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On	Do This
TCSServer	**Configure Taskmaster Client Service** Start > All Programs > Datacap > Taskmaster Client > Taskmaster Client Service > Client Service Settings window > Confirm Taskmaster Client Service is Stopped. Taskmaster Server tab > Enter Server Name or IP address, click Connect Admin/Engine tab > Admin database tab > select Database type, select application's Admin database on the Server Engine database tab > select Database type, select application's Engine database on the Server Click Connect Login tab: select appropriate authentication method and enter info, click Login Workflow:Job:Task tab > Expand workflow, expand jobs, select tasks in each job that this Taskmaster Client Service is to run Clear Stop on Abort, select Mixed queuing, clear Write to Debug, change the Sleep and Task Instances settings if appropriate, then click Save. Logging tab > Change settings if appropriate, click Save. Taskmaster Server tab > click Disconnect TM Sub tab > click Start Click Close. Admin Tools > double-click Services Scroll down to Datacap Taskmaster Client Service, right-click > Properties General tab > Change Startup Type to Automatic, click Apply, click OK
Workstation	**Test Taskmaster Client Service by Running Application** Start and run application tasks that should trigger the Taskmaster Client Service

Configure Windows Authentication for Taskmaster

On	Do This
Server	Create/ensure domain exists in which Taskmaster-specific AD/LDAP security groups can be created

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On	Do This
Server	Create/ensure AD/LDAP security group exists
Server	Create/ensure Taskmaster user, Taskmaster Client Service accounts exist and are part of security group
Server	**Stop Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Stop

Server	**Configure Taskmaster Server Service to use Windows Authentication**
	Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server
	Taskmaster tab > click Show Advanced, enter either Native AD or typical LDAP authentication string:
	`WinNT://<%domain%>/<%user%>`
	`LDAP://CN=<%user%>,CN=Users,DC=<%domain%>,dc=Com`
	Click Save
	Service tab > click Start

Workstation	**Ensure Workstation's Registry** Edit the Workstation's Windows registry so it reflects UNC of Server and path to the \\Server\Datacap\RRS\ folder Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\
Workstation	**Add Taskmaster Group to Application** Start Taskmaster Client Application as Admin Settings > Groups Click Add, and enter a Group ID that is a concatenation of: --Your Taskmaster-specific security group name --A dot --The domain to which your Taskmaster-specific security group belongs Click Apply, then OK Expand Privileges, select appropriate privileges, click Apply, then OK Expand Permissions, select appropriate permissions, click Apply, click OK, click Apply, click Done
Workstation	**Update Authentication Parameter in Taskmaster Client Application Shortcut** Right-click application shortcut > Properties Press <End> to move cursor to end of Target field, then ensure last parameter in line is -nta, click Apply, click OK

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Configure Rulerunner Running as a Web Service

Note: "Rulerunner running as a Web Service" is referred to here as "Rulerunner account"

These instructions cover Windows 2003 Server.

On	Do This
Server	**Ensure Domain/Windows User Account exists for Rulerunner account with Log on as a service right**
Server	**Set Up Security on Shared Folder for Rulerunner account** Right-click c:\Datacap and select Sharing and Security Click Security tab: Add/ensure Domain/Windows Rulerunner account is set to allow Read & Execute
Server	**Set Up RRS Folder Permissions** Right-click c:\Datacap\RRS and select Sharing and Security Click Security tab: Add/ensure ASP.NET Machine Account (Server\ASPNET) and Internet Guest Account (Server\IUSR_SERVER) are set to allow Full Control; add/ensure Domain/Windows account of Rulerunner account is set to allow Full Control
Server	**Set Up Security on Batches Folder** Right-click c:\Datacap\Application\Batches folder and select Sharing and Security Click Security tab: Add/ensure Domain/Windows Rulerunner account is set to allow Full Control
Server	**Set Up WRRS Folder Permissions** Right-click c:\Datacap\WRRS and select Sharing and Security On Security tab: ASP.NET Machine Account (Server\ASPNET) and Internet Guest Account (Server\IUSR_SERVER) are set to allow Read & Execute; add/ensure Domain/Windows Rulerunner account is set to allow Full Control

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On	Do This
RRServer	**Update ASP.NET Process Identity in Machine.Config File** In Windows Explorer, navigate to and use Notepad to edit: c:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CONFIG\machine.config Locate <system.web> and <processModel… Add Rulerunner account information to <processModel autoConfig="true" enable="true" userName="MYDOMAINRulerunnerAccountName" password="RulerunnerAccountPassword"/> Save and close file
RRServer	**Grant Access to IIS Metabase** Start > Run Type cmd, click OK. Locate the aspnet_regiis.exe and run with -ga parameter followed by the domain name, a backslash, then the Rulerunner account name; for example (no line breaks): C:\>C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe -ga DOMAIN\RulerunnerAccountName then press <ENTER>. Close the DOS command window
RRServer	**Grant DCOProcessor Permissions in DCOM Config** Admin Tools > Component Services > DCOM Config > DCOProcessor, add and grant Local Launch and Local Activation permissions to the Rulerunner account.
RRServer	**Edit RRServer's Registry** Ensure the RRServer's Windows registry reflects the UNC name of Server (rather than C:\) and path to the \\Server\Datacap\RRS folder Regedit: HKEY_LOCAL_MACHINE > SOFTWARE > DATACAP > RRS> locations > rrs should reflect: \\Server\Datacap\RRS\
RRServer	**Create and Share Virtual Directory for Rulerunner** Admin Tools > IIS > expand computer > expand Web Sites folder > right-click Default Web Site and select New > Virtual Directory > Alias: RRS Web Site Content directory: c:\Datacap\WRRS folder Access Permissions: Read, Run scripts, Execute Right-click RRS > Properties ASP.NET tab > confirm version is 2.0.nnnnn

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On	Do This
RRServer	**Set Timeout Parameters for Rulerunner** Admin Tools > IIS > expand computer > expand Web Sites folder > expand Default Web Site and right-click RRS > Properties Virtual Directory tab > click Configuration button > Application Configuration > Options tab > Select Enable session state, Timeout = 20, select Enable parent paths, Default ASP Language = VBScript, ASP Script timeout = 1200 ASP.NET tab > click Edit Configuration button > General tab Application tab > Request execution timeout > 1200 State Management tab > Session timeout = 20
RRServer	**Set Web Site Isolation Mode** Admin Tools > IIS > expand computer > Right-click Web Sites > Web Site Properties > Service tab, select WWW Isolation Mode: Run Service in IIS 5.0 Isolation Mode
RRServer	**Select Web Service Extensions** Admin Tools > IIS > expand computer > click Web Service Extensions Select/ensure Active Server Pages, ASP.NET v2.0.50727, and Server Side Includes are Allowed.
Any	**Test Rulerunner Access to Virtual Directory** Open Internet Explorer, enter: http://RRServerName/rrs/session.asmx
Server	**Start Taskmaster Server Service** Start > All Programs > Datacap > Taskmaster Server > Taskmaster Server > Start
Workstation	**Configure Taskmaster Application to Use Rulerunner as a Web Service** Sign on as Taskmaster user "admin" Settings > Workflow > select Main Job > select Recognize task, click Setup Recognize Setup - Batch Pilot window > select the Rulerunner Web Service option, click Done. Click Apply.
Workstation	**Test Taskmaster Application Using Rulerunner as a Web Service** Create a batch and process it through the (Recognize) task. Open application's batches folder, open log file associated with task, look for "RRS is REMOTE" entry.

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Appendix C

Taskmaster Installer Command Line Parameters

This Appendix provides information about the most commonly used parameters available when running the Taskmaster InstallShield Setup.exe from the command line.

Other parameters that are available are the standard InstallShield parameters and standard Microsoft Windows Installer parameters.

InstallShield Parameters

To view the InstallShield parameters:

1. From the Windows Start menu, select Run. The Run dialog opens.
2. Click the Browse button, navigate to the folder containing the Taskmaster InstallShield Setup.exe, select it, and click Open. The Browse window closes and the full path to the Setup.exe is displayed in the Run dialog.
3. After Setup.exe, add a space and /? (for example: c:\SP1\setup.exe /?), then click OK. The InstallShield parameters are displayed.
4. Click OK to close the InstallShield message box.

Microsoft Windows Installer Parameters

To view Microsoft's Windows Installer parameters:

1. From the Windows Start menu, select Run. The Run dialog opens.
2. Click the Browse button, navigate to the folder containing the Microsoft Windows Installer program msiexec.exe, select it and click Open. The Browse window closes and the full path to the msiexec.exe is displayed in the Run dialog.
3. After msiexec.exe, add a space and /? (for example: C:\WINDOWS\system32\msiexec.exe /?), then click OK. The Windows Installer parameters are displayed.
4. Click OK to close the Windows Installer message box.

Most Commonly Used Taskmaster Setup.exe Parameters

The following table covers the command lines that are most commonly used when installing Taskmaster.

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IMPORTANT NOTES

When installing components individually (Server, Web, Client), you must also install the 'Shared' component, otherwise the individual component will not function properly.

Name/value pairs (for example INSTALLDIR=\"<path>\" and ADDDEFAULT=Shared,Server) are case-sensitive: Name is all capitals, values are upper/lower case as shown.

Replace <path> with full path (for example C:\Datacap).

Replace <filename> with name to assign to log file (for example: installLog).

To Do This	Use This Command Line
Silent Install: Quiet mode, no user interaction	setup.exe /S /V"/quiet"
Silent Install: Quiet mode, different location	setup.exe /S /V"/quiet INSTALLDIR=\"<path>\""
Silent Install: Unattended mode - progress bar only	setup.exe /S /V"/passive"
Silent Install: Unattended mode, different location	setup.exe /S /V"/passive INSTALLDIR=\"<path>\""
Create Install Log	setup.exe /V"/log <path>\<filename>.txt"
Disable Auto Reboot after Install Finishes	setup.exe /V"/norestart”
Passively install 'Server' only	setup.exe /S /V"/passive ADDDEFAULT=Shared,Server"
Passively install 'Client' only	setup.exe /S /V"/passive ADDDEFAULT=Shared,Client"
Passively install 'Web' only	setup.exe /S /V"/passive ADDDEFAULT=Shared,Web"
Passively install 'Server' & 'Web'	setup.exe /S /V"/passive ADDDEFAULT=Shared,Server,Web"
Passively install 'Client' & 'Support' & ‘Docs’	setup.exe /S /V"/passive ADDDEFAULT=Shared,Client,Support,Docs"

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