IBM Datacap Taskmaster Capture Version 8.0.1 Fix Pack 3 Readme

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About IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 3

Review this document for installation instructions and other important information before you install IBM® Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 3. Fix Pack 3 contains the updates from Fix Pack 1 and Fix Pack 2 as well as additional updates.

Upgrading to IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 3

Run the Fix Pack installation package for IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 3 on machines on which IBM Datacap Taskmaster Capture, Version 8.0.1.0, 8.0.1.1, or 8.0.1.2 has been installed.

You must run the Fix Pack installation package (Update.exe) on every machine on which IBM Datacap Taskmaster Capture is installed. When it is run, the installation package will automatically determine which Taskmaster software component or components are currently installed and will perform only the required updates.

Important

You must upgrade all clients and servers to the same IBM Datacap Taskmaster Capture version and fix pack. Different versions of IBM Datacap Taskmaster Capture are not compatible; therefore you cannot connect an IBM Datacap Taskmaster Capture client with a server that has a different IBM Datacap Taskmaster Capture server version or fix pack installed. Operating Taskmaster Client or Taskmaster Web with an incompatible version of Taskmaster Server, or allowing different versions to access one database, can result in loss of data.

Once installed, this Fix Pack cannot be uninstalled. However, you can use "Uninstall or change a program" in Control Panel to uninstall the entire Taskmaster Capture product.

The language you selected when installing Taskmaster Capture Version 8.0.1 determined the language displayed in the InstallShield panels at that time, and also controls the language in which the InstallShield panels for this Fix Pack are displayed.

System requirements

This section provides a link to the hardware and software requirements for IBM Datacap Taskmaster.

http://www.ibm.com/support/docview.wss?uid=swg27022202

New features added to Taskmaster Capture

This section describes the new features added to Taskmaster Capture Version 8.0.1 in Fix Pack 3.

Help text is updated for the Parascript® FieldScript® recognition properties

This Fix Pack provides updated help text for the recognition properties that are associated with the recently qualified Parascript® FieldScript® software component. The help text and recognition properties are applicable only if you have licensed the component. For more information about the updated content, see the IBM Datacap Taskmaster Capture Version 8.0.1 publication library page at:
http://www.ibm.com/support/docview.wss?uid=swg27020850

MTOM connector to FileNet Content Engine 5.1 added

This Fix Pack adds the Message Transmission Optimization Mechanism (MTOM) connector to transmit data between Taskmaster and the FileNet Content Engine 5.1. The MTOM connector replaces the DIME interface that was used in previous releases but is no longer supported.

The following prerequisites must be installed on the IBM Taskmaster Client station:

- IBM Datacap Taskmaster Capture, Version 8.0.1

- FileNet P8 Content Engine Version 4.5.0, 4.5.1, 5.0 or 5.1 where IBM FileNet Content Manager is supported. Install the desired version of the Content Engine Client files by running the FileNet Content Engine Server installation program. The version of the Content Engine Client should match the version of the Content Engine Server. When you run the installer, select the FileNet.NET API

- Web Services Enhancements (WSE) for Microsoft.NET 3.0.
  See http://www.microsoft.com/download/en/details.aspx?id=14089 for installation instructions

Additional user language support added

This Fix Pack extends language support for the Taskmaster Web and Taskmaster DotEdit user interfaces to include Croatian, Czech, Hungarian, Romanian, Slovak, and Turkish. This additional language support includes recognition support for all of these languages.

To configure a Taskmaster application to recognize these languages, complete the steps provided in Instructions for running on non-English machines, Check Windows operating system settings, and Adjust applications that perform recognition below.

Note that system administration user interfaces, Taskmaster thick client user interfaces, Taskmaster Web help topics, Taskmaster DotEdit application-specific panels, application-specific words related to workflows, jobs, tasks, or rules, and some error messages were not translated.

Connector to IBM Classification Module for Wordfire document classification

This Fix Pack adds the IBM Classification Module connector to your IBM Datacap Taskmaster Capture system. This connector, also known as Wordfire, extends Taskmaster's traditional document recognition capabilities with IBM's context and natural language-aware content analyzer that can automatically classify documents.

The sample Taskmaster Mortgage application included in this Fix Pack uses IBM Classification Module Version 8.7 to analyze the data recognized on incoming mortgage-related document images, to classify and assign a Page Type to each image, and to move the resulting TIFs to folders with the same Page Type names.

An introduction to and instructions for configuring and running the sample Taskmaster Mortgage application in a single machine environment are in the section titled IBM Datacap Taskmaster Capture Connector to IBM Classification Module for Wordfire document classification starting on page 16 in this document.

You must purchase and license IBM Classification Module separately from Taskmaster, and both IBM Classification Module and Taskmaster must be installed and configured before you can use the Taskmaster connector.

The main IBM Classification Module web page contains product information and links, including a "How to buy" link:

http://www.ibm.com/software/data/content-management/classification

Additional batch numbering scheme

This Fix Pack includes an additional DLL (BATNEW17.DLL) that supports batch IDs in the following format:

YYYYMMDD.LLLLLL where

- YYYY - the four digit year (0001 - 1997)
- MM - month (1 - 12)
- DD - day (number from 1 to 31)
- LLLLLL - 000000 – 999999

Instructions for using this DLL are provided in:

c:\Datacap\dcshared\batchnew\batchnew.txt

New Qualifications

IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 2 is qualified for use with:

- IBM IDM Desktop 4.0.3
- IBM FileNet Image Services 4.2.0

User interface language support added

The Taskmaster Web and Taskmaster DotEdit user interfaces were translated into Brazilian Portuguese, Dutch, French, German, Italian, Polish, Spanish, and Swedish.

Note that system administration user interfaces, Taskmaster thick client user interfaces, Taskmaster Web help topics, Taskmaster DotEdit application-specific panels, application-specific words related to workflows, jobs, tasks, or rules, and some error messages were not translated.

You can translate existing English field labels on an application's DotEdit and Taskmaster Web panels using Datacap Studio. The Application Development using Datacap Taskmaster Capture publication, form number SC1-3251-01, describes developing a Taskmaster application using Datacap Studio, and includes a description of the Taskmaster label variable (page 456), the value of which can be translated. Links to the Application Development Using Datacap Taskmaster Capture publication and associated sample documents, can be found on the Datacap Taskmaster Capture 8.0.1 publication library page:

http://www.ibm.com/support/docview.wss?&uid=swg27020850

Instructions for running on non-English machines

In general, the language of the data being processed must match the language and locale options selected **for the Windows account of the logged on user** on the machine. If multiple users use a single machine, these settings must be set for each user. In addition, if a Taskmaster service like Taskmaster Server Service, Rulerunner Quattro Service and Rulerunner Quattro Control Service is being run, these language and locale options must be selected **for the Windows account** used by the service.

Ensure all of the relevant options have been set for each Windows account as described below:

Check Windows operating system settings

1   Install or ensure the appropriate language pack has been installed.

2   From Control Panel > Region and Language, on the:

- **Formats Tab**: Since date and currency validation actions in Taskmaster support only the default settings, do not make other changes to date or currency settings

on the Formats tab or the Customize Format tab. Custom actions can be created to support alternative formats for date and currency.

- **Location Tab**: Select or ensure the appropriate location is selected in the Current location field.
- **Keyboards and Languages Tab**: Select or ensure the appropriate keyboard is selected.
- **Administrative Tab**: Select or ensure the appropriate locale is selected in the Language for non-Unicode programs field.

Check Internet Explorer (when used as thin Taskmaster Web client)

1 Open the browser, on the Tools menu, select Internet Properties.

2 On the General tab, in the Appearances section, click the Languages button.

3 In the Language Preferences window, add or ensure the appropriate language is included in the Languages list.

4 Use the Move up button to move the language to the top of the list.

Adjust applications that perform recognition

If an application does not perform any kind of recognition, ignore these steps.

Identify recognition engine and levels

1 Start Datacap Studio (Start > All Programs > Datacap > Datacap Studio > Datacap Studio) and open your application.

2 Expand the rulesets that perform recognition so you can see the actions contained in the rulesets.

3 Identify which recognition engines are used in the application, and the levels (document, page, field) at which the actions run by looking through the application's recognition rulesets and making a list:

   a Locate each action with a name beginning with "Recognize" and add it to your list

   b To determine the recognition engine used, in all cases, the action name contains the name of the recognition engine (ICR_C, OCR_A, OCR_S)

   c To determine the level (Document, Page, Fields) at which the action runs, in many cases, the action name contains information about the level. If the action name does not contain information about the level, locate and select the action in the Actions library tab and click the help button (green "i" button) and make a note of the level.

   d Note that the actions that are "RecognizePageFields" actions, while bound at the page level, actually run recognition at the field level, so the language for these actions must be selected at the field level for every field on the page.

Update language for each level

Once you have looked through your recognition rulesets and know which recognition engine or engines are used, and at which levels the recognition actions run, depending on the level, you must update the language setting or settings on every document, page and field.

Note: You do not have to make these changes to documents and pages that do not contain data. For example, ignore documents such as "Other" and ignore pages that do not contain fields (such as "Trailing_Page").

1 Click the Zones tab.

2 Click the tab for the recognition engine to display its properties.

3   Lock the Document Hierarchy and expand the first document so that its pages and fields are displayed.

4   Select each object at each level on which recognition runs, and ensure the following language-specific settings reflect the appropriate language:

- For ICR/C: Scroll down to the Zonal and Full Page Recognition section, and select the appropriate country, region or language.

- For OCR/A: Scroll down to the General section, and select the appropriate Language.

- For OCR/S: Scroll down to the Language Environment section, and select the appropriate Language, then scroll down to the Spell Check section, and select the appropriate Spell Language language.

5   After making your changes click Save changes on the Document Hierarchy toolbar, then unlock the Document Hierarchy.

Issues fixed in IBM Datacap Taskmaster Capture, 8.0.1 Fix Pack 3

APAR	SPR	Brief problem description
IO15222	32995	Converting a Word document that contains tables to TIFF format results in text formatting issues. The text in the table overlaps the borders of the table instead of being inside the table cells. With this fix, the text does not overlap the borders of the table.
IO15245	32993	Stripping message files that contain images during a conversion from Outlook to TFF format leaves borders. With this fix, the borders are no longer displayed.
IO15243	32992	Converting a message file to TIFF format adds a double space between the To: and From: lines in the header of the converted file. With this fix, the double space is no longer added between these lines in the header.
IO15244	32939	Converting a valid 3 level nested eml file by using the Convert Action returns a convert abort error to the user. With this fix, this issue was tested and the eml content was extracted as expected without a convert abort error.
IO14807	32934	Displaying extended Latin characters in aVerify.aspx. With this fix, the encoding for ASCII character values is restored.
IO14806	32933	A validation message is generated when the StartPanel validation fails. With this fix, the StartPanel validation succeeds.
IO14830	32919	Enhancements to web security. With this fix, security enhancements to the Taskmaster Web Client include: • Encrypt cookie to prevent interception of session ID • Invalidate session ID after logoff to prevent reuse of session ID • Prevent access to unauthorized pages by directly browsing to URL, log unauthorized access attempts
IO15223	32912	Using a SetFilter_HostName action with the Fingerprint Service, matches the fingerprints with the hostname that is specified as a parameter in the action. After removing the SetFilter_HostName action, the system continued to match fingerprints with the hostname when it should have matched all fingerprints. With this fix, system matches all fingerprints after you remove the SetFilter_HostName action.
IO14817	32556	When using ImgEnter as the Verify task, Multi-punch OMR fields are displayed incorrectly. With this fix, the Multi-punch OMR fields are displayed correctly.

APAR	SPR	Brief problem description
IO14812	32192	Connecting directly to a Taskmaster Web server and bypassing the BigIP load balancer returns the error "Recent exception in /jmonitor.aspx…viewstate error". With this fix, the error is no longer displayed.
IO15242	32017	Datacap experiences performance issues when the user completes a task or switches between tabs. With this fix, logging enhancements improve performance issues.
IO14708	31975	When verifying a batch, the user could not see the images to verify. With this fix, the images to verify are visible to the user.
IO14714	31939	Processing an Excel spreadsheet generates an "Excel.ConvertToImage exception: Invalid column index." error. With this fix, Excel documents are converted and processed correctly.
IO14874	31998	Processing an Outlook message generates an "Outlook.ConvertToImageAndAttachment exception: The specified content type is invalid." error. With this fix, Outlook messages are converted and processed correctly.
IO14710	32076	Datacap extending email pages which have html tables in message file. With this fix, table rows are populated horizontally.
IO14709	32174	Document integrity failure. With this fix, using the split button on the Fixup form creates a new document with a unique name in the batch.
IO14711	32396	Convert Running, fails to process the Excel document and stays in Convert Running. With this fix, Excel documents are converted and processed correctly.
IO14712	32457	Quattro Rulerunners not processing work. With this fix, Quattro Rulerunners process batches with barcodes.
IO14713	32484	Convert Images abort - This is not a structured storage file. With this fix, Outlook messages are converted and processed correctly.
IO14809	32487	Excel.ConvertToImage exception: Format specifier was invalid. With this fix, Excel documents are converted and processed correctly.
I014563	32505	Application Copy Wizard unable to copy files of attribute type "Normal." With this fix, Application Copy Wizard can now copy files with attributes other than "Encrypted."
IO14818	32935	Romanian language enabled in Datacap Studio for ICR/C, OCR/A and OCR/S.

APAR	SPR	Brief problem description
	24607	Corrections to Custom Action Library project used to create custom Taskmaster actions with Microsoft Visual Studio. With this fix, template contains correct characteristics.
	27109	Connection to Taskmaster Server could fail without apparent reason with the message - Unable to connect to server … on port …, especially after web server restarts. With this fix, normal behavior is restored.
	30437	IsPatternInField returns true when pattern includes a space but the field value does not. With this fix, normal behavior is restored.
	30915	Medical Claims Institutional Black samples: no State value in field 9PatientAddressState. With this fix, normal behavior is restored.
	30945	Medical Claims INST Black samples - Empty NDC fields are displayed on Claim 1 and 2 as Invalid, but on claim 3 as valid. With this fix, normal behavior is restored.
	31051	Taskmaster Flex Manager - title bar of GUI says Taskmaster Flex Configuration, should be Taskmaster Flex Manager. With this fix, name is corrected.
	31053	Help text modifications needed for Autodoc action: SetFingerprintFailureThreshold. With this fix, embedded help accurately reflects the action behavior.
	31055	Action RecognizePageFields2CCO_OCR_S does not write to the CCO. With this fix, normal behavior is restored.
	31089	Problem with smart parameter @STRING; was not parsing correctly when @STRING argument contains a '+' sign. With this fix, normal behavior is restored.
	31098	Correction to embedded help for ICR/C action RecognizeFieldVoteICR_C. With this fix, embedded help accurately reflects the action behavior.
	31176	Taskmaster Web cannot connect to server when more than one server is configured on the Taskmaster Application Manager > Taskmaster tab. With this fix, normal behavior is restored.
	31198	Corrections to developer kit materials used when creating custom Taskmaster actions. With this fix, project contains correct characteristics.
	31267	MClaims: ImgEnter Verify task - cannot finish verifying batch with Attachment(s). Attachments have status 74 while IPS in BVerify.bpp for both workflows is (IPS=128,75,72,52). With this fix, normal behavior is restored.

APAR	SPR	Brief problem description
	31271	Corrections to the Custom Action Library project template to reference Interops rather than DLLs. With this fix, template references correct DLLs.
	31327	FileNet P8 Connector enhancement to update existing document in P8. Adds the capability required to update indexes and metadata for an existing doc in P8.
	31346	Help text modifications needed for VScan embedded help. With this fix, embedded help accurately reflects the actions' behavior.
	31362	Export action: LineItem_AddElement - Embedded action help says to apply action at DETAIL level, but it must be applied to the field LINEITEM. With this fix, embedded help accurately reflects how to use the action.
	31371	Convert: In rare situations, conversion of a multipage PDF would not convert every page. With this fix, normal behavior is restored.
	31375	Correct the name of the Custom Action Library project template used to create custom Taskmaster actions. With this fix, template is correctly named.
	31415	Actions RecognizePageFields2CCO_ICR_C aborts with a type mismatch error. With this fix, normal behavior is restored.
	31461	RECOG_SHARED.rrx: Action's help for SetAdjustFieldToChars is inconsistent when describing the parameter string and there is a line break missing in the example. With this fix, embedded help accurately reflects the action behavior and is formatted correctly.
	31465	Taskmaster Web hangs when adding new station or shortcut. With this fix, normal behavior is restored.
	31471	Taskmaster Web Client Service clear text password needs to be obfuscated. With this fix, a clear text password is no longer required.
	31478	FileNetP8 update actions fail when called multiple times. With this fix, normal behavior is restored.
	31505	Support Internet Explorer 9 web client.
	31545	Wordfind locate rules are not working properly. With this fix, normal behavior is restored.
	31601	The convert task did not abort; it just failed to convert all attached files. With this fix, normal behavior is restored.

APAR	SPR	Brief problem description
	31662	OCR/A recognition of E13B font not working. With this fix, normal behavior is restored.
	31667	Create 8.0.1_SP1 Fix Pack installation package and Readme doc.
	31670	Can't open child batch after splitting via task running under Quattro. With this fix, normal behavior is restored.
	31693	User from another domain allowed to log in to Taskmaster with incorrect password when using Windows Authentication. With this fix, normal behavior is restored.
	31713	The default application name in the dc2Run.exe.config file is "1040ez" but it needs to be "1040EZ". With this fix, normal behavior is restored.
	31755	Is TMWeb vulnerable to SQL Injection attack? With this fix, the vulnerability is removed.
	31906	Express application displays invalid data and crashes when using prelayout.aspx instead of aindex.aspx. With this fix, normal behavior is restored.
	31935	IsPatternInField returns true when pattern includes a space but the field value does not. With this fix, normal behavior is restored.
	31953	MCLAIMS:PROF BLACK: OMR fields are not recognized, all returned as BLANK. With this fix, OMR fields are correctly recognized whether blank or selected.
	31955	When using the IsCurrency action, Locale of the computer and the language found on the image must match. When they do not match, the IsCurrency action fails to locate the amount. The field is displayed in red. With this fix, the action locates the amount values and displays them appropriately.
	32020	DCSmart @DATE adds leading and trailing spaces to result, does not use default if no argument sent with call. With this fix, normal behavior of this Taskmaster special variable is restored.
	32040	APT Verify: Invoice Date on Stinger Wellhead image is "02/15/10" but after the IsFieldDateWithReformat action it has become "00/15/2010" and fails validation. With this fix, normal behavior of the action is restored.

Known limitations in IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 3

Read this information to learn about known limitations in IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 3.

- **Rulerunner Enterprise (Quattro):** Rulerunner may occasionally encounter an error during processing of a batch, leaving the batch in either "aborted" or "running" state. These errors may be caused by external conditions such as a sudden system shutdown, disk failure; or by critical errors detected in the low level actions being executed.

  o Batches that are aborted or "left running" do not proceed in the workflow pending resolution of the problem. This is by design to ensure that all completed batches produce correct outputs. In cases where the problem was transient, these batches can be automatically or manually reset to pending status and reprocessed.

  o Logging is usually required to determine the cause of aborted batches.

  o The NENU utility can be used to automatically reset all batches that fail (up to N times), or to reset a subset of batches based on the characteristics of that batch and task.

  o Depending on the specific task and application, failed batches may require corrective action before they can successfully complete. NENU can be configured to take any actions required before reprocessing a batch – e.g. restoring original image files, removing data associated with the documents in an intermediate rule, etc.

  o vscan, email, and fax input rules should be operated in a single Rulerunner thread on a set of input folders or mailboxes.

  o Best Practice for development and deployment of Rulerunner: Operate Rulerunner with a single thread before configuring multiple threads. Four threads are a recommended initial value for multiple threads.

  o Troubleshooting Rulerunner errors: The Taskmaster Installation and Configuration Guide contains a section dedicated to Rulerunner Quattro troubleshooting. In short: enable logging and examine logs for errors, operate single thread, separate rulesets into separate task profiles if needed to isolate failure.

- **NENU:** The locale dependent action QuerySetDateRange does not work with the Polish date format in an Oracle 11g database.

- **DotEdit:** Multiline fields do not enforce the MaxLength property of the edit control. Validation actions can be used to restrict the length. DotEdit sometimes does not display panel correctly from batches on hold.

- **New Application Wizard**: 1) Copying an application from client to server fails with the message "Invalid Taskmaster Web folder". To resolve, leave the TMWeb field blank if Taskmaster Web is not yet set up, or supply the correct Web Server name. 2) Copying an application from client to server does not properly update Fingerprint and Export DB file paths, if Datacap.xml is on the server. To resolve, copy Datacap.xml from server to client and configure Top Path to point to client local version before running App Wizard. App Wizard not updating paths in taskmod table properly during copy if there's a number in the new app name.

- **Taskmaster Web aindex task:** In IE8, fields with status -1 are not hidden.

- **Taskmaster Web verify task (prelayout, aptlayout):** If the user enters data in angle brackets < > the batch will fail and display a Runtime Error (Application Error on Server). Verify task requires that all runtime fields are defined in the Setup DCO (Document Hierarchy). If any field is not so defined, displays the error message:

"Object reference not set to an instance of an object", stack trace inside DCSnip.RestoreSourceNode called by DCSnip.OnDataBinding

- **Taskmaster Web ProtoID:** After pasting a page in ProtoID, the "Paste" link changes to a page number, two page numbers are displayed above several of the thumbnails, the < and > links for the pasted page are broken, and after clicking + to enlarge the thumbnails, some thumbnails are still original size.

- **Taskmaster Web Job Monitor:** Cannot sort columns in Job Monitor in MClaims application that is using Oracle Ora 11g Engine database with over 21K batches.

- **Taskmaster Web:** MClaims application with Oracle Ora 11g database (over 21K batches) in German - cannot open Administrator QA tab.

- **IBM Content Manager Connector:** Limited to CM8. CM child attributes, access control and document management properties are not supported. CM for iSeries v5.x is not supported. Information Integrator (ii4c) is not supported. IBMCM_SetAttributeValue accepts Smart Parameters.

- **IBM FileNet Image Services (IS) Connector:** Tested with Image Services v4.1.2.5, expected to work with any version as long as the matching IDM Client is installed on the station where the connector runs.

- **OCR/S Recognition Action:** The OCR_S actions SetFastTradeOffOCR_S and SetLegacyDecompositionOCR_S are not working in this release

- **Actions and Action Help:** Redact action causes Rulerunner to abort if its coordinate values are 0,0,0,0. The Help text for the dcpdf_CreateTiffFromPDF_CreateDocs action incorrectly states that this action creates an Adobe PDF document. Picture.rrx: Custom picture strings are not working in Picture.rrx.

- **Taskmaster Application Manager**: [Application Tab] Batches, Export, Fingerprints folder:
  1. Use any xml format character in the field then save the form by exiting or changing the app. On re-entering the app, the field in question will be blank but the value with xml format chars entered is in the app file. Workflows:2. Create two workflow names with the same value. Select Add new workflow, panel errors out and closes. 3. Setup DCO, ImageFix.ini: enter a file path ending with backslash and select browse. Panel errors out and closes. [Taskmaster Tab]4. No edit field for 'retries' attribute in app file for Servers list. 5. Removing all Servers and adding a new Server does not re-add 'retries' attributes. [Quattro Tab] 6. Create duplicate Task names and select 'Add new Task', panel errors out and closes. 7. No way to change order of existing task entries, user must add and delete entries to perform this functionality. [Custom Values Tab] 8. General String, DSN CS, TM CS, and value name fields: Duplicate value names and selecting Add new: panel errors out and closes. [Service Tab] 9. app management path: use backslash as last character and select browse; panel errors out and closes.

- **RV2**: RV2 is installed with a configured limit of 5,000 records per report. This setting can be modified by editing the web.config file in the RV2 folder and raising the value of MaxResultsReports. The practical limit for the number of records to include in a report within a reasonable wait time is approximately 10,000. There can be more records in the database as long as the report is filtered to moderate the number of records included.

- The **Taskmaster Client and Batch Pilot Windows help systems** will work on 32-bit systems (Windows XP). For 64-bit systems (Windows 7), either access HTML versions of the help systems from Start/All Programs/Datacap/Taskmaster Client/Taskmaster Client Help and Start/All Programs/Datacap/Batch Pilot/Batch Pilot Help respectively, or download and install the Windows Help viewer program (WinHlp32.exe) for Windows 7 from Microsoft.

- To access **Taskmaster Web** from a computer with a 64-bit operating system, you must use the 32-bit version of Internet Explorer.
- If **multiple Taskmaster Servers** access the same application(s), only one Server may be used to update the Admin database. Any changes to workflows, users, groups, tasks, task modules, permissions or privileges must be made via one of the Taskmaster Servers. If such changes are made via more than one Server, some changes will be lost and the Admin database could become corrupt.
- FindBlackFingerprint action is not functional in this release.
- **SQL Server and Oracle** DB conversion utilities
  If the source Engine database is a Taskmaster 7.6 database in MS-Access (missing new Taskmaster 8.0 tables), the following error messages are displayed: "*Invalid database type*" and *"Error occurred: please check your settings."* An invalid SQL script is created. The proper procedure is to convert the Access database to Taskmaster 8.0 format using the Datacap Studio Application Wizard in Convert mode before running the DB utility.
- **Taskmaster Client**
  Configuring a Task Condition in the Workflow tab of the Taskmaster Client Administrator dialog can only be accomplished if the Task Module associated with the Task has a full path in the Parameter field of the Module tab. Otherwise the condition is not displayed.
- **APT** Recognition setting for spelling language defaults to Afrikaans (39)
- **Datacap Studio**
  - Image Processing setup and test in Datacap Studio Zones tab – developer must save changes to the settings file that is used by the application's ImageFix ruleset before performing Image Processing.
  - While an application developer has locked the Document Hierarchy (Setup DCO) for editing, Rulerunner tasks may fail (batch will abort). The RRS log will contain a message similar to this:
    Failed to load rulemap from C:\Datacap\APT\dco_APT\APT.xml; error:0; The process cannot access the file because it is being used by another process.
  - Corrected some user interface issues when stepping in Debug mode and in Breakpoints
- **SharePoint Connector**
  SharePoint performs best when the number of documents in any one folder is kept below 2,000 (cf http://sharepoint.microsoft.com/Blogs/GetThePoint/Lists/Posts/Post.aspx?ID=162). Recommended best practice is to specify a document path using the SP_SetURL action such that each batch gets its own folder. SharePoint has a limit of 5 million items in any folder, including subfolders.
- **Livelink Connector** - Livelink library
  - Uploads documents and indexes to OpenText Livelink Server 9.7 or compatible
  - Prerequisite install Livelink 9.7 SDK and MS J# 2.0 on each station where rules will run
  - Limitation: 32-bit Windows operating system on each station where rules will run
  - Populates document variable LLID with uploaded docID
  - .NET actions, support Smart Parameters for Livelink UserID and Password
  - Rollback-aware, prevents duplicate uploads if export task runs more than once

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Change in Issue Status

- **Taskmaster Web remote scan task (scancl.aspx):** Automatic upload Upload=1 not working in remote scan client. Issue resulted from a misunderstanding of how to configure an automatic upload. Issue closed since it is working as designed.
- **eDocument Conversion Actions:** Conversion aborts on eml file extension. Issue was resolved and fixed in the first shipped version of Datacap Taskmaster Capture Version 8.0.1. This issue was resolved and the fix was shipped in Datacap Taskmaster Capture Version 8.0.1.

IBM Datacap Taskmaster Capture Connector to IBM Classification Module for Wordfire document classification

Overview of the Taskmaster Mortgage Application

The sample IBM Datacap Taskmaster Capture Mortgage application included in this Fix Pack uses IBM Classification Module Version 8.7 to analyze the data recognized on incoming mortgage-related document images, to classify and assign a Page Type to each image, and to move the resulting TIFs to folders with the same Page Type names.

The Mortgage application includes an IBM Classification Module knowledge base that contains the categories (Page Types) used by the Mortgage application, but does not include any classification information.

The Mortgage application includes seven sample images: three Truth In Lending (TILFINAL) documents and four Note documents.

The first time you process these images through the Mortgage application, during the Verify task, you manually assign the appropriate Page Type to each one. After you have successfully processed all of the images through the entire workflow (VScan, Recognize, Verify, Export), the next time you process the images, IBM Classification Module will assign the Page Types automatically. We included multiple images of the same Type because IBM Classification Module needs to "see" a minimum of three documents of the same Type before it can begin to automatically classify documents.

If you assign an incorrect Page Type to a document during Verify, the next time that document is processed, it will be classified incorrectly. You will have to manually assign the correct Page Type to that document and process it a few more times before the application begins classifying it correctly.

Configuring IBM Datacap Taskmaster Capture Wordfire

The information in these instructions provides the minimum amount of information you need to set up Taskmaster, IBM Classification Module connector, and to run the sample Taskmaster Mortgage application provided by Fix Pack 2. These instructions cover configuring Taskmaster and IBM Classification Module in a single machine environment for demonstration purposes only.

Note that there are two names used for Version 8.7 of IBM Classification Module - it is also referred to as "IBM InfoSphere™ Classification Module."

These instructions assume that you have performed a complete installation of IBM Datacap Taskmaster Capture Version 8.0.1 on the Workstation on which you are installing Taskmaster Capture Fix Pack 2. For complete information on Taskmaster Capture Version 8.0.1, see the publication library:

http://www.ibm.com/support/docview.wss?uid=swg27020850

For instructions on installing Taskmaster 8.0.1, use the link on the publication library page to download the IBM Datacap Taskmaster Capture Version 8.0.1 Installation and Configuration Guide.

These instructions also assume that you have licensed, downloaded, and installed IBM Classification Module Version 8.7 Fix Pack 1 Interim Fix 1 on the Workstation on which you are installing Taskmaster Capture Fix Pack 2. First you install IBM Classification Module Version 8.7, then download and install Fix Pack 1, and then download and install Interim Fix 1.

For complete information on IBM Classification Module Version 8.7, see the Information Roadmap:

http://www.ibm.com/support/docview.wss?uid=swg27015053

For installation instructions, see the IBM Classification Module Information Center:

http://publib.boulder.ibm.com/infocenter/classify/v8r7

Follow the steps in the "Installing" section to perform a complete installation on the Workstation and accept all of the default settings.

Important: If you are installing on Windows 7, you must run the Classification Module installation program as an administrator. Right-click the icmsetup87_win32.exe file and select **Run as Administrator**.

Then download and install Fix Pack 1 on the Workstation and accept all default settings. For instructions, see the IBM Classification Module Version 8.7 Fix Pack 1 web page:

http://www.ibm.com/support/docview.wss?uid=swg24025142

Then download and install Interim Fix 1 on the Workstation and accept all default settings. For instructions, see the IBM Classification Module Version 8.7 Fix Pack 1 Interim Fix 1 web page:

http://www.ibm.com/support/docview.wss?uid=swg24030864

Configure and Run on Single Machine

This section provides the information you need to configure the Taskmaster and IBM Classification Module components on a single Windows XP or Windows 7 machine (Workstation). It also includes instructions on how to run the sample Mortgage application "out of the box" so you can see Taskmaster use the IBM Classification Module connector to automatically classify the sample documents included in the installation package. This configuration is suitable for demonstration purposes only.

The tasks are performed in the following sequence:

1   Publish and Start the MortgageKB Knowledge Base

2   Start or Ensure the Taskmaster Server Service is Started

3   Start and Run the Mortgage Application

Publish and Start the MortgageKB Knowledge Base

A pre-configured version of the MortgageKB knowledge base is distributed with Fix Pack 2.

For instructions on publishing the knowledge base, see the Classification Module tutorial:

http://www.ibm.com/support/docview.wss?uid=swg27015699

To publish and start the knowledge base, complete the following steps in Module 2: Publishing the knowledge base by using the Management Console.

1   Complete the steps in Lesson 1 using the default settings.

2   Complete the steps in Lesson 2 using these substitutions:

- For the knowledge base name, use MortgageKB instead of Tutorial_KB. Note that the knowledge base name is case sensitive.

- For the knowledge base to import, browse to and select the C:\Datacap\Mortgage\MortgageKB\MortgageKB.kb knowledge base.

After you have finished Lesson 2, you are ready to begin processing the sample mortgage documents.

Start or Ensure Taskmaster Server Service is Started (XP, Windows 7)

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 Taskmaster Server Service is started when the operating system is Windows XP or Windows 7.

1   From the Workstation's Windows Start menu, select All Programs, select Datacap, select Taskmaster Server, and click Taskmaster Server Manager.
On Windows 7, when UAC is on, the User Account Control window opens. Click Allow.
The Taskmaster Server Manager 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 Taskmaster Server Manager window.

Start the Mortgage Application

This procedure provides instructions on how to start the Taskmaster Mortgage Client application for the first time when the Workstation's operating system is Windows XP or Windows 7. Note that after the first time you log into the Taskmaster Client, it remembers and displays what you entered the previous time.

These instructions apply to Windows XP and Windows 7.

1   From the Workstation's Windows Start menu, select All Programs, select Datacap, select Applications, select Mortgage, and click the Mortgage Client icon. The Taskmaster Client - Mortgage window opens and a Station is missing in the profile message is displayed.

2   Click OK. If your Windows login credentials are used, a Login name and/or password invalid message is displayed.

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

4   Replace your Windows User ID with admin, enter admin as the password, replace your computer name with the number 1, then click OK. The Taskmaster Client - Mortgage main window opens with the Operations pane displayed.

Run the Mortgage Application VScan Task

This procedure provides instructions on how to run the Mortgage application VScan task to process pre-scanned images.

1   On the Workstation, in the Operations pane, double-click the VScan 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 the task has finished.

2   Click Stop. The message box closes and the Operations pane is redisplayed. When the VScan task finishes successfully, the Mortgage application has picked up the images from the \Mortgage\images folder and created a 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 the

\Mortgage\batches folder This folder holds all of the document image processing results for this batch of forms, including the TIF files and newly-created vscan.xml file.

3　To view information about the batch, in the Operations pane, click the View menu and select *Job Monitor* to open the Job Monitor window.

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 *Main Job.Recognize* and *pending.*

Run Mortgage Application Recognize Task

This procedure provides instructions on how to run the Mortgage application Recognize task.

You can run this task:

- In the Operations pane, double-click the Recognize shortcut
- In the Job Monitor pane, double-click a batch with a pending Recognize task

1　On the Workstation, in the Operations pane, double-click the Recognize 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 the task has finished.

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

3　When the Recognize task finishes successfully, data from each image has been captured in .txt files, fingerprint (CCO) files have been created, and page XML files that contain character confidence values have been created in the batch's uniquely-numbered folder found in \Mortgages\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 *Main Job.Verify* and *pending.*

Run Mortgage Application Verify Task

This procedure provides instructions on how to run the Mortgage application Verify task.

You can run this task:

- In the Operations pane, double-click the Verify shortcut
- In the Job Monitor pane, double-click a batch with a pending Verify task

1　On the Workstation, in the Operations pane, double-click the Verify shortcut. The Verify - Batch Pilot window opens.

2　Maximize the window and, to display the document image, on the View menu, select Image View.

3　Select the Type, and click the Next Problem button. The next document is displayed.

4　Repeat the previous step for each image in the batch. When you have finished with the last document, a message box is displayed indicating No more problems have been found.

5　Click Yes to finish the batch. The message box closes and another message box is displayed indicating the task has finished.

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

7   When the Verify task finishes successfully, a Verify.xml file has been created in the batch's uniquely-numbered folder found in \Mortgages\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 *Main Job.Export* and *pending.*

Run Mortgage Application Export Task

This procedure provides instructions on how to run the Mortgage application Export task.

You can run this task:

- In the Operations pane, double-click the Export shortcut

- In the Job Monitor pane, double-click a batch with a pending 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 the Export task has finished.

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

3   When the Export task finishes successfully, an Export.xml file has been created in the batch's uniquely-numbered folder found in \Mortgage\batches that includes data about the images that have been processed. In addition, folders have been created in the \Mortgage\export folder, assigned the names of each of the Types that have been processed, and copies of the processed images have been placed in the appropriate folders.

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 *Main Job.Export* and *Job done.*

5   Exit the Mortgage application.