

IBM Datacap Taskmaster Capture Version 8.0.1 Fix Pack 1 Readme

May 12, 2011

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Table of Contents

About IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1.....	1
Fix Pack 1 installation information	1
User interface language support added.....	2
Instructions for running on non-English machines	2
Issues fixed in IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1.....	5
Known limitations in IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1..	7

About IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1

Review this document for installation instructions and other important information before you install IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1.

Fix Pack 1 installation information

Read this section before you install or upgrade IBM Datacap Taskmaster Capture to Version 8.0.1 Fix Pack 1.

Upgrading to IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1

IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1 requires that IBM Datacap Taskmaster Capture, Version 8.0.1 is installed before you install Fix Pack 1.

You must run the fix pack installation package (Update.exe) on every machine on which IBM Datacap Taskmaster Capture Version 8.0.1 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 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-01.ibm.com/support/docview.wss?uid=swg27020397>

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 SC1-3251-00, describes developing a Taskmaster application using Datacap Studio, and includes a description of the Taskmaster label variable (page 287), the value of which can be translated. Links to the Application Development Using Datacap Taskmaster Capture publication and associated forms and files, can be found on the Datacap Taskmaster 8.0.1 Publication Library page:

<http://www-01.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:

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.

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.

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:

- a) For ICR/C: Scroll down to the Zonal and Full Page Recognition section, and select the appropriate country, region or language.
 - b) For OCR/A: Scroll down to the General section, and select the appropriate Language.
 - c) 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, Version 8.0.1 Fix Pack 1

- Corrections to Custom Action Library project used to create custom Taskmaster actions with Microsoft Visual Studio. With this fix, template contains correct characteristics
- 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.
- IsPatternInField returns true when pattern includes a space but the field value does not. With this fix, normal behavior is restored.
- Medical Claims Institutional Black samples: no State value in field 9PatientAddressState. With this fix, normal behavior is restored.
- 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.
- Taskmaster Flex Manager - title bar of GUI says Taskmaster Flex Configuration, should be Taskmaster Flex Manager. With this fix, name is corrected.
- Help text modifications needed for Autodoc action: SetFingerprintFailureThreshold. With this fix, embedded help accurately reflects the action behavior.
- Action RecognizePageFields2CCO_OCR_S does not write to the CCO. With this fix, normal behavior is restored.
- Problem with smart parameter @STRING; was not parsing correctly when @STRING argument contains a '+' sign. With this fix, normal behavior is restored.
- Correction to embedded help for ICR/C action RecognizeFieldVoteICR_C. With this fix, embedded help accurately reflects the action behavior.
- 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.
- Corrections to developer kit materials used when creating custom Taskmaster actions. With this fix, project contains correct characteristics.
- 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.
- Corrections to the Custom Action Library project template to reference Interops rather than DLLs. With this fix, template references correct DLLs.
- 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.
- Help text modifications needed for VScan embedded help. With this fix, embedded help accurately reflects the actions' behavior.
- 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.

- Convert: In rare situations, conversion of a multipage PDF would not convert every page. With this fix, normal behavior is restored.
- Correct the name of the Custom Action Library project template used to create custom Taskmaster actions. With this fix, template is correctly named.
- Actions RecognizePageFields2CCO_ICR_C aborts with a type mismatch error. With this fix, normal behavior is restored.
- 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.
- Taskmaster Web hangs when adding new station or shortcut. With this fix, normal behavior is restored.
- Taskmaster Web Client Service clear text password needs to be obfuscated. With this fix, a clear text password is no longer required.
- FileNetP8 update actions fail when called multiple times. With this fix, normal behavior is restored.
- Support Internet Explorer 9 web client.
- Wordfind locate rules are not working properly. With this fix, normal behavior is restored.
- The convert task did not abort, it just failed to convert all attached files. With this fix, normal behavior is restored.
- OCR/A recognition of E13B font not working. With this fix, normal behavior is restored.
- Create 8.0.1_SP1 Fix Pack installation package and IBM-like "readme" doc
- Can't open child batch after splitting via task running under Quattro. With this fix, normal behavior is restored.
- User from another domain allowed to login to Taskmaster with incorrect password when using Windows Authentication. With this fix, normal behavior is restored.
- 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.
- Is TMWeb vulnerable to SQL Injection attack? With this fix, the vulnerability is removed.
- Express application displays invalid data and crashes when using prelayout.aspx instead of aindex.aspx. With this fix, normal behavior is restored.
- IsPatternInField returns true when pattern includes a space but the field value does not. With this fix, normal behavior is restored.
- MCLAIMS:PROF BLACK: OMR fields are not recognized, all returned as BLANK.
- DCSSmart @DATE adds leading and trailing spaces to result, does not use default if no argument sent with call.
- APT Verify: Invoice Date for Stinger Wellhead image reads "00/15/2010", fails validation (IsFieldDateWithReformat).

Known limitations in IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1

Read this information to learn about known limitations in IBM Datacap Taskmaster Capture, Version 8.0.1 Fix Pack 1.

- **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 doesn't 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:** Problem after pasting page in ProtoID
- **Taskmaster Web remote scan task (scanl.aspx):** Automatic upload Upload=1 not working in remote scan client
- **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.
- **eDocument Conversion Actions:** very long subject lines in .eml files may cause the batch to abort
- **OCR/S Recognition Action:** The OCR_S actions SetFastTradeOffOCR_S and SetLegacyDecompositionOCR_S are not working in this release
- **Locate Actions:** When using the IsCurrency action, the computer's Locale and the language found on the image have to match; when they don't match, this action will fail to locate the amount (field will be displayed in red).
- **Actions and Action Help:** Redact action aborts if the coordinate values are 0,0,0,0. Help for dcpdf_CreateTiffFromPDF_CreateDocs action is incorrect. 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 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.
- **Oracle**
 - o Fingerprints can be maintained in Oracle DBs. Actions to add fingerprints require an ODBC connection string. When ODBC is used, Datacap Studio will give a warning message on startup. The Fingerprint Maintenance Tool requires an OLEDB connection, but it cannot add fingerprints or update the dates of fingerprints stored in Oracle.
 - o When a Fingerprint database is hosted in an Oracle database, Datacap Studio requires a Microsoft driver (connection string with Provider=msdaora) whereas the Fingerprint Maintenance Tool requires an Oracle driver (Provider=OraOLEDB.Oracle).
 - o Support for Oracle databases does not include support for the Oracle Exadata platform
- **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**
 - o 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.
 - o 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.

- o 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
 - o Uploads documents and indexes to OpenText LiveLink Server 9.7 or compatible
 - o Prerequisite install LiveLink 9.7 SDK and MS J# 2.0 on each station where rules will run
 - o Limitation: 32-bit Windows operating system on each station where rules will run
 - o Populates document variable LLID with uploaded docID
 - o .NET actions, support Smart Parameters for LiveLink UserID and Password
 - o Rollback-aware, prevents duplicate uploads if export task runs more than once