



# **TaskAide Installation Guide**

<http://www.laservault.com>

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## Introduction

TaskAide is a software package offered by LaserVault for use with our LaserVault Imaging system. LVI must be installed for TaskAide to function. TaskAide expands the functionality of the LVI system by allowing you to route your documents through a business process in a digital format. There are many benefits to using TaskAide, most notably, the ability to track documents as they are worked through the business process. TaskAide can also allow you to examine and improve the efficiency of your business processes.

The TaskAide system is driven by workflows. In TaskAide, a workflow is made up of a series of tasks linked by transitions. Tasks can be scripted or manual. Manual tasks can include both data input fields and decision options. A scripted task uses VBScript to evaluate data and determine which task to move to next.

Each workflow and task allows the ability to send email notifications when various events occur. This allows you to notify either the assigned user that there is new work to be completed, or any other user or role that you wish to send a notification at any part of the workflow.

# Installing the TaskAide System

Start by launching the TaskAide Configuration utility.



The next steps that are required are labeled in order, 1 through 3.

## Step 1

Select the Site Directory

This function will allow you to select the directory in which to install the TaskAide site files. This directory can reside anywhere on the server where an IIS “Virtual Directory” or “Web Application” can be configured. Once the directory is selected, you can verify that the path is correct by examining the “Site Directory” label at the top of the screen.

## Step 2

### Site Configuration

This option will bring up a screen that allows you to specify the settings that will be used by this TaskAide installation.

The screenshot shows a 'Site Properties' dialog box with four main sections:

- TaskAide SQL Server Settings:** Includes fields for SQL Server (127.0.0.1), SQL User Name (sa), SQL Table Prepend (WKFLW), SQL Password (masked), Database Path (F:\SQLdata), and a checkbox for 'Use NT Auth'. A 'Test Connection' button is at the bottom.
- Paths and URLs:** Includes fields for Imaging Server URL (http://127.0.0.1/LVIWeb/ImevWeb.ASP), TaskAide Server URL (http://127.0.0.1/TaskAide/TaskAideServer.asp), and IMEV Config Path (F:\Installprep\IMEVCFG\IMEVCONFIG.XML). A checkbox for 'Use IIS/Windows Integrated Authentication' is at the bottom.
- SMTP Server Settings:** Includes fields for SMTP Server (smtp.west.cox.net), SMTP User Name, SMTP Port (25), SMTP Password, Email From Address (erik@laservault.com), and Email From Name (Erik Dabrowsky). It also has a dropdown for 'SMTP Authorization Type' (set to '<Server Specified>') and a 'Test Settings' button. A checkbox for 'Log Notification Email Activity' is at the bottom.
- ActiveX Install Options:** Includes a checkbox for 'Run ActiveX installs using the following account:' and fields for 'Run As User Name', 'Run As Password', and 'Run As Domain'.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

### TaskAide SQL Server Settings

These settings specify what information TaskAide uses to connect to the MSSQL database server. This must be an SQL2000 or MSDE2000 SQL Server.

### SMTP Server Settings

These settings specify what information TaskAide uses to connect to the SMTP mail server for sending notifications. An important setting is the Authorization Type used when communicating with the SMTP server. Be sure to test the settings using the "Test Settings" button to ensure that a successful connection is possible with the supplied settings.

### Paths and URLs

These are the URLs that will be used, as well as the path to the LVI Configuration File.

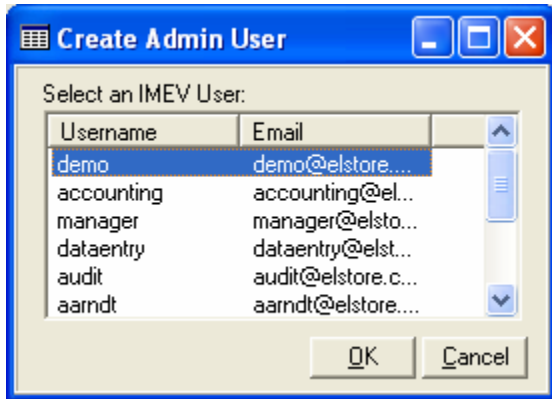
- LVI URL Example: http://<webserver>/imev/imevweb.asp
- TaskAide URL Example: http://<webserver>/taskaide/taskaideserver.asp

Upon clicking "OK" to this dialogue, the necessary files will be copied to and created in the root directory that was selected in step 1, and the database will be created or updated.

### Step 3

#### Create Admin User

This process will allow you to select a user to add to the TaskAide system that will function as an administrator account. Once you have setup and administrator account you can log in with the TaskAide Admin console and manage the system.

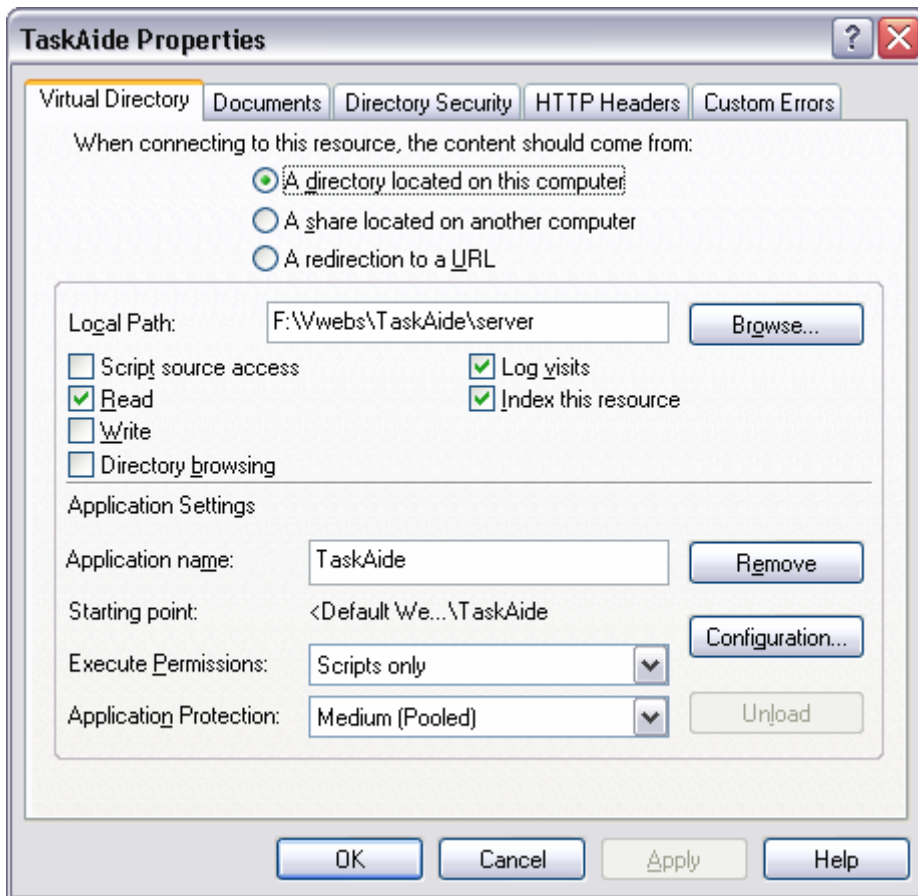


# Web Server Configuration

Presently, the TaskAide system is written to support only Microsoft's Internet Information Server (IIS). The TaskAide system has been tested on IIS version 5 (Windows 2000 Server) and greater.

The general configuration of IIS is beyond the scope of this documentation, and this documentation assumes that IIS is installed and property configured to serve ASP scripted web pages.

To setup the IIS Virtual Directory or Web Application, right click on the IIS web site under which you want the TaskAide application. Then browse to the "server" subdirectory in the directory you selected to install TaskAide into in step 1.



Once the Virtual Directory is setup you can log in to the TaskAide Admin Client using the URL:  
[http://\[servername\]TaskAide/TaskAideAdmin.asp](http://[servername]TaskAide/TaskAideAdmin.asp)

The URL for the TaskAide Client is:  
[http://\[servername\]/TaskAide/TaskAide.asp](http://[servername]/TaskAide/TaskAide.asp)