ImageNow Accounts Payable Invoice eForm

Installation and Setup Guide

Version: 10.1.0.x
Compatible with ImageNow Versions: 6.5.1 to 6.7.x

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Date: September 2012

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Overview

The ImageNow Accounts Payable Invoice eForm solution is a ready-to-use form for processing and approving invoices for payment that can be configured to fit your company's specific Accounts Payable operations. The following procedures demonstrate how to install the form on ImageNow. After completing the installation, you must configure the form to work in your environment.

You can use this eForm with Enterprise Resource Planning (ERP) applications such as Lawson, PeopleSoft, and Microsoft Dynamics AX. You can use the eForm for virtually any business application that is used to process invoices for payments. In order to install the eForm for any other business application, choose of the business application option that best fits your scenario.

Installation requirements

ImageNow client

You must be running ImageNow version 6.5.1.149 to 6.7.x.

Note If you are running previous versions of ImageNow, please contact Product Management for more information on installing the AP Invoice eForm.

Licenses

For the initial installation of the Accounts Payable Invoice eForm, you must have the following licenses:

- Uploaded Form license
- Uploaded iScript license

If you need licenses, contact your Perceptive Software representative.

Prepare for installation

Prior to installing the form, complete the following planning activities.

Form design

1. **Review the invoice header information.** Verify that all the data that you need to capture is accounted for on the form header. You can use eight optional amount fields and 10 optional text fields to accommodate any additional values you need to capture. For more information, refer to the "AP_Skin.xml" portion of the "Accounts Payable Invoice eForm configuration files" section in the *ImageNow AP Invoice eForm Supplemental Guide*.
2. **Review the invoice detail for Non-PO invoices (GL coding).** Verify that the GL account fields are properly defined. If you need to capture any additional values, activate and use any of the 24 optional fields. For more information, refer to the "AP_Skin.xml" portion of the "Accounts Payable Invoice eForm configuration files" section of the *ImageNow AP Invoice eForm Supplemental Guide*.
3. **Review the invoice detail for PO-based invoices (PO matching).** The PO detail lines include standard fields such as quantity, unit of measure, unit price, and extended amount, which are not allowed to be repurposed. However, there are 10 optional fields you can use to capture additional information at the PO line level. For more information, refer to the "AP_Skin.xml" portion of the "Accounts Payable Invoice eForm configuration files" section of the *ImageNow AP Invoice eForm Supplemental Guide*.

Workflow design planning – invoice entry/import

1. **Review the current workflow.** Identify the queues where invoice entry occurs.
2. **If you are doing manual entry, verify that every entry queue is set up for invoice entry.** For more information, refer to the "Configuring workflow for Accounts Payable Invoice eForm" section in the *ImageNow AP Invoice eForm Supplemental Guide*.
3. **If you are importing invoices from Brainware Distiller, you need to set up an import queue in the workflow.** You should have an inbound action, AP_ValidateServer.js, on the import queue that processes the incoming data. For example, the queue might pull vendor and PO information for PO-based invoices. You should also have a within queue routing rule which routes PO and non-PO invoices into the implementation workflow based on the current process flow. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section in the *ImageNow AP Invoice eForm Supplemental Guide*.

Workflow design planning – Invoice entry validation

- **Each point in the workflow process where changes can occur to the form requires validation.** After items are routed to the form queue where form changes occur, they should flow into an invoice validation queue where the AP_ValidateServer.js script can be executed as an inbound action. This script not only validates the data; it also sets document key values and custom properties. This queue should also have a within queue routing rule that handles routing the invoice. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section of the *ImageNow AP Invoice eForm Supplemental Guide*.

Workflow design planning – non-PO invoice GL entry and invoice approval

- **Determine the points of the workflow where GL coding should be captured and invoice approvals should occur.** Verify that workflow queues involved are set up for form processing. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section in the *ImageNow AP Invoice eForm Supplemental Guide*.

Workflow design planning – PO-based invoice exception matching

- **Determine the points of the workflow where PO matching should occur.** Verify that workflow queues involved are set up for form processing. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section in the *ImageNow AP Invoice eForm Supplemental Guide*.

Define workflow queue roles

Each workflow queue where the form is used must be listed in the <*roles*> section of the AP_Skin.xml file in the [*drive:*]\inserver6\etc\ap directory. This file determines what role the form plays in the workflow queue and how the form is viewed. For more information, refer to the "About workflow queue roles" and "AP_Skin.xml" sections in the *ImageNow AP Invoice eForm Supplemental Guide*.

Install Accounts Payable Invoice eForm on Windows

To install the ImageNow AP Invoice eForm, complete the following procedures.

Download the files

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log in to the Customer Portal.
2. In the **Product Downloads** page, search for the **ImageNow AP Invoice eForm** file specific to your ERP.
3. Download the relevant files to a temporary directory on your computer.

Install AP Invoice eForm

To install AP Invoice eForm, you use the zip file you previously downloaded from the Customer Portal. Complete the following steps.

1. Navigate to the AP Invoice eForm zip file.
2. Extract the **AP Invoice eForm <*version*>\inserver6\temp** folder to **[*drive:*]\inserver6**.
3. In **[*drive*:]\inserver6\temp\apef_install**, run the **apef_install.bat** file.
4. After the batch file runs,, compare the old configuration files, stored in **[*drive*:]\inserver6\temp\apef_install\converted_configs**, with the new configuration files, stored in **[*drive*:]\inserver6\etc\ap**.
5. Make the necessary adjustments to the new configuration files to retain any configuration settings.

Finish Invoice eForm installation

The form installation process sets up the necessary custom properties, document types, virtual tables, and the form. After this, you can configure the form, modify the workflow process, load the data, and perform other configuration tasks. For more information, refer to the *ImageNow AP Invoice eForm Supplemental Guide*.

Create application plan for Accounts Payable Invoice eForm

The following steps explain how to create an external type application plan you can use with external ImageNow interfaces, such as iScript or Message Agent.

Important You must type all names provided in the steps below exactly as listed. The application plan is case sensitive.

Create a new application plan

1. In **Management Console**, in the left pane, expand the **Application Plans** tree, and click **External**.
2. In the right pane, on the **Applications** tab, click **New**.
3. In the **Plan Settings** dialog box, click the **General** tab.
4. Under **Information**, complete the following substeps.
    1. In the **Name** box, type **Z_APW_VirtualTables_AppPlan**.
    2. In the **Description** box, type a description for your application plan.
    3. Select the **Is active** check box.
    4. Click **OK**.

Add the dictionary values

1. In the **Application Plan Designer**, in the **Dictionary** pane, click the **New Field** button. In the **Dictionary Field** dialog box, complete the following substeps.
    1. In the **Name** box, type **FOLDER_NAME**.
    2. Click **OK**.
2. In the **Dictionary pane**, click the **New Field** button again. In the **Dictionary Field** dialog box, complete the following substeps.
    1. In the **Name** box, type **FOLDER_TYPE**.
    2. Click **OK**.

Create the folder levels

1. In the **Document** pane, click the **Remove Level** button. On the **Convert Map** confirmation window, click **Yes**.
2. In the **Drawer** pane, double-click on **Drawer**. In the **Drawer Attributes** dialog box, complete the following substeps.
    1. In the **Drawer** list, click **Z_APW_VirtualTables**.
    2. Click **OK**.
3. To add two folder levels, click **Add folder level** twice.
4. In the first **Folder – Default** pane, double-click on **Folder Name**. In the **Folder Name Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Dictionary**.
    2. In the **Value** list, click **FOLDER_TYPE**.

3. Click **OK**.

5. In the first **Folder – Default** pane, double-click on **Folder Type**. In the **Folder Type Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Folder Type**.
    2. In the **Value** list, click **Z_APW_VirtualTable**.
6. In the second **Folder – Default** pane, double-click on **Folder Name**. In the **Folder Name Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Dictionary**.
    2. In the **Value** list, click **FOLDER_NAME**.
    3. Click **OK**.
7. In the second **Folder – Default** pane, double-click on **Folder Type**. In the **Folder Type Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Dictionary**.
    2. In the **Value** list, click **FOLDER_TYPE**.
8. Save and close the application plan.

Configure Accounts Payable Invoice eForm

After installing Accounts Payable Invoice eForm, you must complete the following procedures. The installation process creates two document types, Invoice and Credit Memo, and all the custom properties used in conjunction with the Accounts Payable Invoice eForm solution.

Update the virtual tables

Perform this procedure to synchronize the data between the virtual tables in the ImageNow database and your business application at any time. This procedure might take several hours to complete processing. If you installed ImageNow Server on a drive other than C:\, or you are using a non-Windows platform, you must change the paths in the Configuration section of the AP_VirtualTable_Updater.xml file before running this script.

1. Verify the CSV files are created and stored in the **[*drive:*]\inserver6\temp\ap\import** directory. For more information, refer to the "Virtual Tables CSV Files" section in the *ImageNow AP Invoice eForm Supplemental Guide*.
2. On the ImageNow Server computer, start **INTool** by accessing a command prompt and changing directories to **[*drive:*]\inserver6\bin**.

   Note If you use a 64-bit operating system, access INTool at **[*drive:*]\inserver6\bin64**.
3. Enter the following command:

   ```
   intool --cmd run-iscript --file AP_VirtualTable_Updater.js
   ```
4. After the command completes, verify that it was successful:
   1. Navigate to the **[*drive:*]\inserver6\log** directory and open the **AP_VirtualTable_Updater_[*date*].log** file in a text editor.
   2. Verify that lines similar to the following lines appear at the end of the file:

      ```
      03/10 08:55:54.729 AP_VirtualTable_Updater:0B [ NOTIFY ] Done:

      **************************************************
          2836     C:\inserver6\temp\ap\import\Lawson PO Lines.csv - ADD
             2     C:\inserver6\temp\ap\import\Lawson PO Lines.csv - CHANGE
          2838     C:\inserver6\temp\ap\import\Lawson PO Lines.csv - TOTAL
          2836     TOTAL - ADD
             2     TOTAL - CHANGE
          2838     TOTAL RECORDS

      Script run time 103 Seconds
      **************************************************

      03/10 08:55:54.729 AP_VirtualTable_Updater:0B [  INFO  ]
      03/10 08:55:54.729 AP_VirtualTable_Updater:0B [  INFO  ] Script run time:  1m
      43s (103 total seconds)
      ```

Update virtual table privileges

You must grant the Use privilege, for each virtual table project or folder, to all users or groups who use the AP Invoice eForm.

In ImageNow versions 6.5.1 to 6.6.x, you grant the Use privilege to users or groups at the Project level. In ImageNow version 6.7.x, you grant the Use privilege to users or groups at the Folder Type level.

To assign a project or folder privilege to a group, complete the following steps.

1. In **Management Console**, in the left pane, click **Groups**.
2. In the right pane, on the **Security** tab, in the **Search for groups** box, type all or some of a user name, and then click **Search**.
3. In the **Select a group** list, click the appropriate group > **Modify**.
4. In the **Security Settings** dialog box, click **Project Privileges** or **Folder Type Privileges.**
5. In the **Project Type** or **Folder Type** list, select the type to which you want to apply privileges. Virtual table projects begin with the letter **Z**.
6. In the **Privileges** list, click the column in front of **Use** to display the **Accept** icon.
7. Click **OK**.
8. Repeat the above steps for each Project or Folder type.

Note You can also set virtual table privileges at the user, rather than group, level. To do so, in **Management Console** click **Users** and follow the same steps.

Configure workflow for Accounts Payable Invoice eForm

After installing Accounts Payable Invoice eForm installation, you must configure the form to work with your existing AP workflow process.

If you do not have an error queue defined in your workflow process, you must add one. Workflow uses this queue to route invoices with errors other than simple validation errors from the AP workflow process.

You must add the Accounts Payable Invoice eForm to every workflow queue that plays one of the following roles:

- Invoice Entry
- Invoice Processing
- Invoice Approval

If you use Brainware Distiller in conjunction with your form implementation, you do not use the Invoice Entry role. For more information, refer to the *ImageNow AP Invoice eForm Supplemental Guide*.

Create a custom view definition

In ImageNow versions 6.5.1 to 6.6.x, you create a view definition at the Project level.

In ImageNow version 6.7.x, you create a view definition at the Folder level.

To create a custom view definition, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the **Project** or **Folder** tab, click **New**.
3. In the **New View** dialog box, in the **Name** box, type the name of the `<viewname>` configured in **AP_Config.xml**. In the **Description** box, type the description of the view that will appear in the **ToolTip** for the view. Click **OK**.

   Note The default value for `<viewname>` is Z_APW All Projects in versions 6.5.1 to 6.6.x, or Z_APW All Folders in ImageNow version 6.7.x. You can customize this value, but it must match a valid view name.
4. Click the new view > **Modify**.
5. In the **View Designer** window, in the **Preview** pane, click the **Columns** button.
6. In the **Columns** dialog box, select the check box for **Project ID** or **Folder ID** and click **OK**.
7. In the **Preview** pane, right-click **Project ID** or **Folder ID** and select **Sort Ascending**.
8. **Save** and **close** View Designer. In the **View Designer** confirmation box, click **Yes** to activate the view.

Modify the Form Configuration Files

When you install the eForm solution on your ImageNow Server, the installer places several types of files on your computer. These files include XSL, XML, iScript, CSS, and graphics, as well as other types of files. Do not modify the installed Presentation, Data Definition, or the iScript files. Modifying these files can cause an upgrade of this solution to fail. This section assumes you have a working programming knowledge of ImageNow forms, JavaScript, and iScript.

The XML configuration files allow you to adjust the style, formatting, and other elements of your form. For example, you can edit the AP_Custom_Cultures.xml file to make culture-specific customizations to your AP Invoice eForm. The Accounts Payable Invoice eForm file directories section references these files in detail in table format.

Some files require modification or contain optional configuration elements. For example, if you are running your ImageNow Server on a drive other than C:\ or on a non-Windows platform, you need to adjust the path statements in some of the files, as outlined in the “About the virtual table updater configuration file” section.

AP_VirtualTable_Updater.xml

The AP_VirtualTable_Updater.xml file includes a configuration section at the beginning of the file that requires you to tailor paths as shown below. Adjust your configuration section prior to using this script in order to update your virtual tables with the business application data from the CSV files.

```
<configuration host="lawson" inputpath="C:\inserver6\temp\ap\import\*.csv"
containsheaderline="true" archivepath="C:\inserver6\temp\ap\archive"
errorpath="C:\inserver6\temp\ap\error">
```

AP_Export.xml

The AP_Export.xml file includes a configuration section at the beginning of the file that requires you to tailor paths as shown below.

```
<configuration errorqueue="APO Error" stampexported="true" update_po_table="true"
routeforward="true" nextqueue=""
outputdir="C:/inserver6/temp/ap/export">
```

Use the following guidelines when modifying this file:

- Do not use apostrophes or single quotes; use double quotes instead.
- Be wary of any foreign language characters and their impact when used for element values.
- Save your changes often while editing a file.
- Test changes to your XML files by opening the file in Internet Explorer. If the file does not open in Internet Explorer, to make corrections to the files and re-test them.
- All element values must be lowercase.

AP_Skin.xml

If you make any configuration changes to the AP_Skin.xml file, you must complete the following actions to re-populate the AP_SkinCache.js file:

1. On the ImageNow Server computer, start **INTool** by accessing a command prompt and changing directories to **[*drive:*]\inserver6\bin**.

   Note If you use a 64-bit operating system, access INTool at **[*drive:*]\inserver6\bin64**.

2. Enter the following command:

   ```
   intool --cmd run-iscript --file AP_Maintenance.js
   ```

AP_Custom_Cultures.xml

You can configure your AP Invoice eForm to display text in different languages. The AP_Custom_Cultures.xml file allows you to make culture-specific customizations to your AP Invoice eForm so that it can be understood by different global audiences. For example, you can update this file to customize label captions, error messages, date formats and currency formats.

If you make any configuration changes to the AP_Custom_Cultures.xml file, you must complete the following actions to re-populate the AP_SkinCache.js file:

1. On the ImageNow Server computer, start **INTool** by accessing a command prompt and changing directories to**[*drive:*]\inserver6\bin**.

   Note If you use a 64-bit operating system, access INTool at **[*drive:*]\inserver6\bin64**.

2. Enter the following command:

   ```
   intool --cmd run-iscript --file AP_Maintenance.js
   ```

Configure AP Invoice eForm for a global environment

By default, AP Invoice eForm uses the language of the locale specified at the operating system level of the client computer. For more detailed information on ImageNow and planning for a global environment, refer to the *ImageNow Language Pack Getting Started Guide*.

Configure language, date, and currency settings

Complete the following steps if you want to override your Windows regional settings and set the language so that all users see the same language:

1. Navigate to **[*drive:*]\inserver6\etc\ap** and open **AP_Skin.xml** with a text editor.
2. For **<defaultlanguage>**, complete one of the following substeps:
   - To display the appropriate language in your AP Invoice eForm according to your locality, type the two-character language code for one of the following supported languages:
     - For Dutch, type **nl**.
     - For English, type **en**.
     - For French, type **fr**.
     - For German, type **de**.
     - For Portuguese, type **pt**.
     - For Spanish, type **es**.

     In the example below, the language is set to English.

     ```
     <defaultlanguage>en</defaultlanguage>
     ```
   - To refine the language based on a specific country and to display the date, number, percentage and currency format in your AP Invoice eForm according to that locale, type the appropriate four-character language-country code for one of the following supported countries:
     - For Dutch-Belgium, type **nl-BE** or for Dutch-Netherlands, type **nl-NL**.
     - For English-Australia, type **en-AU**, for English-Canada, type **en-CA**, for English-Great Britain, type **en-GB**, for English-India, type **es-IN**, or for English- United States, type **en-US**.
     - For French-Belgium, type **fr-BE**, for French-France, type **fr-FR**, and for French-Switzerland, type **fr-CH**.
     - For German-Germany, type **de-DE** or for German-Switzerland, type **de-CH**.
     - For Portuguese-Brazil, type **pt-BR**.
     - For Spanish-Argentina, type **es-AR**, for Spanish-Mexico, type **ex-MX** or for Spanish-Spain, type **es-ES**.

     In the example below, the language is set to French and the country is set to Belgium.

     ```
     <defaultlanguage>fr-BE</defaultlanguage>
     ```

     Note For more information on which languages are supported and the language and country codes, refer to the *ImageNow AP Invoice eForm Supplemental Guide*.
3. Save and close **AP_Skin.xml**.

Custom configuration

To make a culture-specific customization to your AP Invoice eForm, complete the following steps.

1. Navigate to **[*drive:*]\inserver6\etc\ap** and open **AP_Custom_Cultures.xml** with a text editor.
2. For **<culture>**, configure the following attributes:
   - For the **name** attribute, type a unique name to identify the specific language and country for which you are customizing the form.
   - For the **base** attribute, type the language code or the language code and country code from which culture inherits the properties, in one of the following formats: *<language code>* or *<language code>-<country/region code>*.

     Note For more information on language and country codes, refer to the *ImageNow AP Invoice eForm Supplemental Guide.*
   - For the **language** attribute, type the top level, more general culture code, in the following format: *<language code>*.
3. For **<numberFormat>** configure the following attributes:
   - For **groupseparator**, type the appropriate separator you want to use to separate number groupings, such as comma (,), period (.), space (ns), or apostrophe (‘).
   - For **decimalseparator**, type the appropriate separator you want to use to separate the integer part of the number and the decimal part, such as comma (,) or period (.).
   - For **groupsizes**, type the appropriate value of the number grouping size, such as 3,2 grouping.
4. For **<calendar>**, configure the following attributes:
   - For **separator**, type the appropriate separator you want to use to separate the day, month, and year values of the date string, such as forward slash (/), hyphen (-), or period(.).
5. For **<patterns>**, configure the following attributes:
   - For **shortinput**, type the appropriate short date format without separators you want to use to format your dates, such as MMddyy.
   - For **longinput**, type the appropriate long date format without separators you want to use to format your dates, such as MMddyyyy.
   - For **display**, type the appropriate short date format with separators you want to use to format your dates, such as MM/dd/yyyy.
6. For **<messages>**, configure the following attributes:
   - For **key**, type the predefined key or custom key for which you want to configure.
   - For **caption**, type the literal text replacement for the above key.
7. Complete the above steps for each culture specific region you want to customize to your form.
8. Save and close **AP_Custom_Cultures.xml**.

Schedule scripts to run

We highly recommend adding a task to the Windows Scheduler to run your scripts. For example, you could set the script to run on an hourly, daily, or weekly basis. You can also use other methods of automating the script, but consider it a best practice to use Windows Scheduler.

The following table lists each script and our recommendations for scheduling a task:

Script	Recommendation
AP_Invoice_Export.js	Schedule this script to run once daily during the evening hours.
AP_VirtualTable_Updater.js	Schedule this script to run once daily during the evening hours. Depending on how often you push new data from your ERP, you may need to run this script more than once daily.
AP_Maintenance.js	Schedule this script to run every minute. This eliminates the need to manually run this script when you make configuration changes.

Create the scheduled task

Complete the following steps if you are using Windows Server 2003:

1. Click **Start** > **Settings** > **Control Panel**.
2. In the **Control Panel** window, click **Scheduled Tasks** > **Add Scheduled Task**.
3. In the **Scheduled Task Wizard**, click **Next.**
4. On the next page of the wizard, click **Browse**.
5. In the **Open** dialog box, navigate to the appropriate directory, click the appropriate script > **Open**.
6. On the next page of the wizard, type a name for the task, such as **Run AP_Maintenance.js**, click **Daily** > **Next**.
7. On the next page of the wizard, accept the defaults and click **Next**.
8. On the next page of the wizard, complete the following substeps.
    1. In the **Enter the user name** box, type ***<computer name>\<username>***.
    2. In the **Enter the password** box, enter the user password.
    3. In the **Confirm password** box, enter the user password.
    4. Select **Open advanced properties for this task when I click Finish** > **Finish**.
9. In the ***<Task name>*** dialog box, on the **Schedule** tab, click **Advanced**.

10. In the **Advanced Schedule Options** dialog box, complete the following substeps.
    1. Select **Repeat task**.
    2. In the **Every** box, type the number and select the appropriate duration from the list. For example, type **10** and select **minutes** to run the script every 10 minutes.
    3. Select **Duration**.
    4. In the **hour(s)** box, type **24**.
    5. Click **OK**.
11. Click **OK**.

Complete the following steps if you are using Windows Server 2008:

1. Click **Start** > **Server Manager**.
2. In the **Server Manager** window, in the left pane, expand the **Configuration** tree, and click **Task Scheduler**.
3. In the right pane, click **Create Task**.
4. In the **Create Task** window, on the **General** tab, complete the following substeps.
    1. In the **Name** box, type a name for the task, such as **Run AP_Maintenance.js**.
    2. Optional. In the **Description** box, type a description for this task.
    3. Under **Security Options**, complete the following substeps:
        1. Click **Change User or Group**,
        2. In the **Change User or Group** dialog box, in the **Enter the object names to select (examples)** box, type *<computer name>**<username>*, and then click **Check Names**.
        3. Click **OK**.
    4. Select **Run whether user is logged on or not**.
5. On the **Triggers** tab, complete the following substeps.
    1. Click **New**.
    2. In the **New Trigger** dialog box, complete the following substeps.
        1. From the **Begin the task** list, select **On a Schedule**.
        2. Under **Settings**, select **Daily**.
        3. Under **Advanced settings**, select **Repeat task every** > the appropriate time frame from the list.
        4. Click **OK**.
    3. Click **OK**.

6. On the **Action** tab, complete the following substeps:
    1. Click **New**.
    2. In the **New Action** dialog box, complete the following substeps:
        1. From the **Action** list, select **Start a program**.
        2. Under **Settings**, click **Browse**.
        3. In the **Open** dialog box, navigate to the appropriate directory, select the appropriate script > **Open**.
        4. Click **OK**.
    3. Click **OK**.
7. In the **Create Task** dialog box, click **OK** to create the task.