

Installation and Activation Guide

The document provides instructions for installing and activating version 2.0 of the TaskMap[®] product. It also provides information about the location of the TaskMap[®] template and stencil files. Finally, it includes instructions for uninstalling TaskMap[®], should that become necessary.

Prerequisites

TaskMap requires either Microsoft Windows 2000 or Windows XP.

TaskMap is an add-in product for Microsoft Visio and, as such, requires that Visio be installed in order to run. TaskMap requires either Visio 2002 or Visio 2003, in either the Standard or Professional version.

When used with Visio 2002, TaskMap version 2.0 requires at least Visio Service Release 1 for certain features to work properly. To determine whether you have Visio Service Release 1 installed, click *Help/About* from the main Visio menu. If you do not have Service Release 1 (or later) installed, use one of the links below:

- **Visio Standard 2002** Service Release 1 (SR-1):
<http://www.microsoft.com/downloads/details.aspx?FamilyID=3a85843f-2890-445d-9596-ddef52624cb2&DisplayLang=en>
- **Visio Professional 2002** Service Release 1 (SR-1):
<http://www.microsoft.com/downloads/details.aspx?FamilyID=654b99d2-dbed-4f2e-b993-43620144b113&DisplayLang=en>

To use TaskMap with Microsoft Office 2003, you must have at least Office Service Pack 2 (SP2) for certain hyperlinking features to work properly. To determine whether you have Office Service Pack 2 installed, click *Help/About* from the main Word menu. If you do not have Service Pack 2 (or later) installed, use the links below:

- **Microsoft Office** Service Pack 2 (SP2) update:
<http://www.microsoft.com/downloads/details.aspx?FamilyId=57E27A97-2DB6-4654-9DB6-EC7D5B4DD867&displaylang=en>

NOTE: Because TaskMap is an add-in for Microsoft Visio, the installation routine registers TaskMap with the current user's copy of Visio. Consequently, to install the software *you must be logged in under the Windows username of the person who will be running TaskMap on this computer.*

Installation

The following procedures will install the TaskMap product, including the TaskMap stencil and template for Microsoft Visio.

1. Ensure that you are logged in with the Windows username of the person who will be running TaskMap on this computer.
2. Ensure that Microsoft Visio is *not running* before you proceed.

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3. Use Windows Explorer or another utility to find the "TaskMapSetup.exe" file you downloaded, then run it. On most systems, this is accomplished by double clicking the file name.
4. When prompted to do so, click the **Setup** button to begin the installation.
5. A **Welcome** screen will be displayed. Click **Next**.
6. A **License Agreement** screen will be displayed. Review the license agreement and if acceptable click **Yes**; otherwise, click **No**.
7. The **Information** screen will be displayed. Please read this important information. Click **Next**.
8. The **Choose Destination Location** screen will be displayed with the default destination location of "C:\Program Files\TaskMap".

If necessary, enter a new destination location by pressing **Browse** and selecting or entering the location. If the entered location does not exist, a dialog will appear indicating that the location does not exist. Click **Yes** if you want the system to create the new location; otherwise, click **No** and enter an existing location.

Once the destination location is correct, click **Next**.

9. The system will confirm the destinations settings by displaying the **Start Copying Files** screen. If the information displayed on this screen is correct, click **Next**; otherwise, click **Back** to adjust the destination location.

Once you have clicked Next, the installation routine will copy files to the destination location.

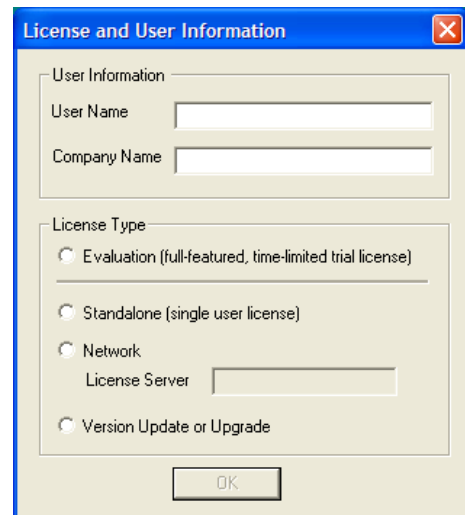
10. The **License and User Information** dialog box will be displayed as shown in the figure to the right.

In the **User Information** section of the dialog, either accept the **User Name** and **Company Name** as displayed, or enter a different User Name and Company Name.

In the **License Type** section, choose the License Type.

- a. Choose **Evaluation** to have the install program place a 15-day trial license on your computer. With this option, all TaskMap functions will be available for the next 15 days. If you have not purchased a permanent license by the end of the 15-day period, TaskMap will stop working at that time.
- b. Choose **Standalone** if you purchased a TaskMap license that will be locked to your PC. For the Standalone option, the install program will run the Client Activator, which will prompt you through the TaskMap activation process (activation instructions are on the next page of this document).

Hint: If you purchased TaskMap at the TaskMap web site, you will most likely be using a



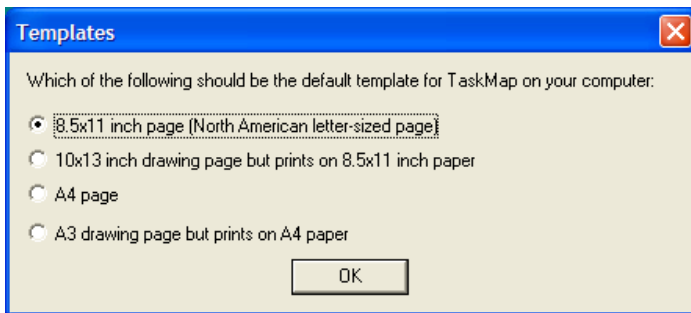
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Standalone license. If you aren't sure whether you have a Standalone or Network license for TaskMap, contact your system or network administrator for assistance.

- c. Choose **Network** if your PC will obtain its TaskMap license from a license server on your organization's network; enter the name of the TaskMap License Server in the box following the words "License Server".
- d. Choose **Version Update or Upgrade** if you have previously installed a TaskMap license and are upgrading to a newer version of the software.

Once you have specified the License type, click **OK**.

11. In the **Templates** dialog, shown below, choose which of the four standard TaskMap templates you would like to have be the default for your computer. TaskMap will use your chosen template whenever you double-click the TaskMap icon on the desktop or launch TaskMap from the Windows *Start/All Programs* menu.



12. The installation program will ask whether you "...**want to add a shortcut to the template on the desktop.**" If you would like to have a shortcut to the TaskMap template on your desktop, click **Yes**; otherwise, click **No**.
13. The **Setup Complete** screen will be displayed. Unless you uncheck **View the Readme file**, the setup program will open the Readme file when you click **Finish**.

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Activation

If you installed with a Standalone license in Step 10 on the previous page, the TaskMap software must be activated before it can be used. After you click Finish to end the software installation, the system will automatically start the Client Activation program.

1. **TaskMap Activation** screen is displayed, click **Activate**.
2. The **Activation Method** screen is displayed. Select the method you will use to activate the system. Click **Next**.
3. Depending upon the activation method you chose, the following screens will prompt you with information and/or fields to complete the activation process.

Telephone

1. Call +1 978-800-4590 option 8.
2. Provide the **Product ID** and **Locking Code** information displayed on the screen to the TaskMap representative.
3. You will receive an email with the TaskMap license attached. Open the license file, then copy and paste the contents of the license file into the **License Code** field.
4. Click **Next**.
5. Click **Finished**.

Fax

1. Complete the online form. Click **Print**. Click **Finished**.
2. Fax the printed registration form to +1 978-428-0707.
3. After you have received your **License Code** for TaskMap, use the Windows Start menu to locate the TaskMap folder, then select **Activate TaskMap** to start the Client Activator.
4. Click the **Activate** button.
5. Select the **Enter a License Code** activation method. Click **Next**.
6. Follow the **Enter a License Code** instructions below.

Email

1. Complete the online form. Click **Email**.
2. The **Default Mailer** dialog box will be displayed. If you have a default email system setup click **Yes**; otherwise, click **No** and either set up a default email system or use a different activation method.

If you clicked Yes to the default email system question and the system is able to create the message, your email will be sent. Click **OK** on the **Email Sent** screen then click **Finished** to close the Client Activator while you wait to receive the



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license code.

NOTE: As a security measure, many PCs are configured to block other applications from sending email. If your activation email bounces back with a message like the one below, it is most likely because of your security settings.

The following recipient(s) could not be reached:

'TM-Help@HarvardComputing.com' on 4/17/2006 7:31 AM

The message could not be delivered because the recipient's destination email system is unknown or invalid. Please check the address and try again, or contact your system administrator to verify connectivity to the email system of the recipient.

There is no need to change your system's security settings. You can either cut and paste the contents of the activation email into an email message you create and send it to TM-Help@harvardcomputing.com, or you can click **Quit** and try a different activation method.

3. After you have received your **License Code** for TaskMap, use the Windows Start menu to locate the TaskMap folder, then select **Activate TaskMap** to start the Client Activator.
4. Click the **Activate** button.
5. Select the **Enter a License Code** activation method. Click **Next**.
6. Follow the **Enter a License Code** instructions below.

Enter a License Code

1. Enter the **License Code** or click the button with the folder icon to browse for the License Code file provided by TaskMap.
If you choose to browse for the license code file, select the file then click **Open**.
2. Click **Next**.
3. Click **Finished**.

Note:

If you need to rerun the Client Activator program at any time, use the Windows Start menu to locate the TaskMap folder, then select **Activate TaskMap** to start the Client Activator.



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Running TaskMap

You can launch Visio and open a new document based on the TaskMap template in several different ways.

1. On the Windows Start menu, locate the TaskMap folder then select **TaskMap**.
2. If you requested that the installation program add TaskMap to you desktop, double-click the TaskMap icon on your desktop.
3. If Visio is already running, select the TaskMap folder in the View Pane and select one of the TaskMap Templates.
4. If Visio is already running, select the TaskMap folder from the File/New menu, then select one of the TaskMap Templates.
5. If Visio is already running, click the down arrow next to the New button on Visio's Standard toolbar, then select one of the TaskMap Templates from the TaskMap folder.

Information About the TaskMap Stencil and Template

The TaskMap stencil and template will be installed in one of two locations depending on the version of Visio you are using.

For Visio 2002:

C:\Program Files\Microsoft Office\Visio10\1033\Solutions\TaskMap

For Visio 2003:

C:\Program Files\Microsoft Office\Visio11\1033\Solutions\TaskMap

The stencil and template filenames are:

TaskMap Stencil.vss

TaskMap Template 1 -- 8.5x11.vst

TaskMap Template 2 -- 10x13 on 8.5x11.vst

TaskMap Template 3 -- ISO A4.vst

TaskMap Template 4 -- ISO A3 on A4.vst



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Uninstalling TaskMap:

Should it ever become necessary to uninstall TaskMap, you can use either of two methods.

Windows Control Panel

1. Ensure that Visio is not running.
2. On the Windows Start menu, select **Settings**, then **Control Panel**.
3. Launch the **Add/Remove Programs** applet in the Control Panel.
4. Scroll to find the TaskMap entry and select it.
5. Click on the **Change/Remove** push button.
6. Click **Yes** when asked whether you want to delete TaskMap and all its components.
7. Close the **Add/Remove Programs** dialog box.

Windows Start Menu

1. Ensure that Visio is not running.
2. On the Windows Start menu, locate the **TaskMap** folder.
3. Select **Uninstall TaskMap**.
4. Click **Yes** when asked whether you want to delete TaskMap and all its components.