
Welcome to Batch Pilot

Welcome to *Batch Pilot*...and to the *Guide to Batch Pilot*!

We have prepared this text for individuals who use *Batch Pilot* to:

- Design, assemble, and test the **Datacap forms** that help configure tasks - and process the documents and pages in a batch, and the data they contain.
- Construct the **Task Projects** that are the foundations for a workflow's tasks.
- Provide each Task Project with a **setup form** and a **runtime form**.
- Set up a task in the final stage of the Task Definition process.
- Process a task.

Chapter 1 shows you how install and access *Batch Pilot*, and reviews the contents of the **Batch Pilot** directory that **Datacap Taskmaster** Installation places on your computer.

Chapter 1 also describes the contents of each chapter in the text, and reviews conventions and standard documentation terminology. This chapter lists the sources of **Datacap** service and assistance, and supporting documentation.

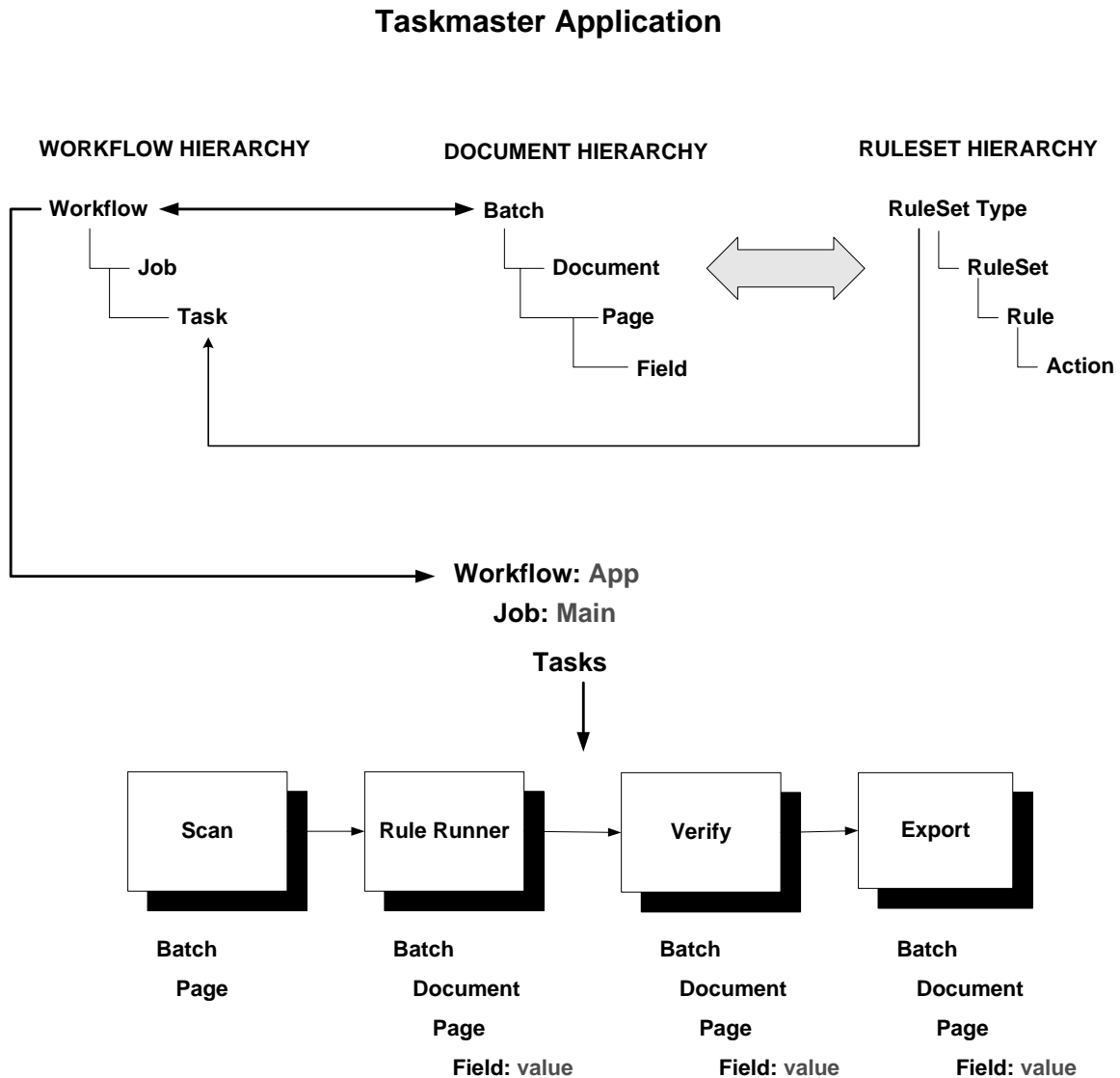
The chapter's topics include:

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- ✓ The *Guide to Batch Pilot* is supported by extensive documentation available to you in printed and electronic (PDF) formats (Page 12). It is also backed by *Batch Pilot Help*: for immediate assistance, just click on the **Help** icon whenever you are working inside the *Batch Pilot Window*.

Introduction

The chart below depicts the architecture of a **Datacap Taskmaster** application as three configuration hierarchies that result in a workflow that processes a batch and its contents:



Objects at the four levels of the **Document Hierarchy** formally delineate all aspects of the application's focus, including the make-up of its **Batch**, **Document**, **Page** and **Field** objects.

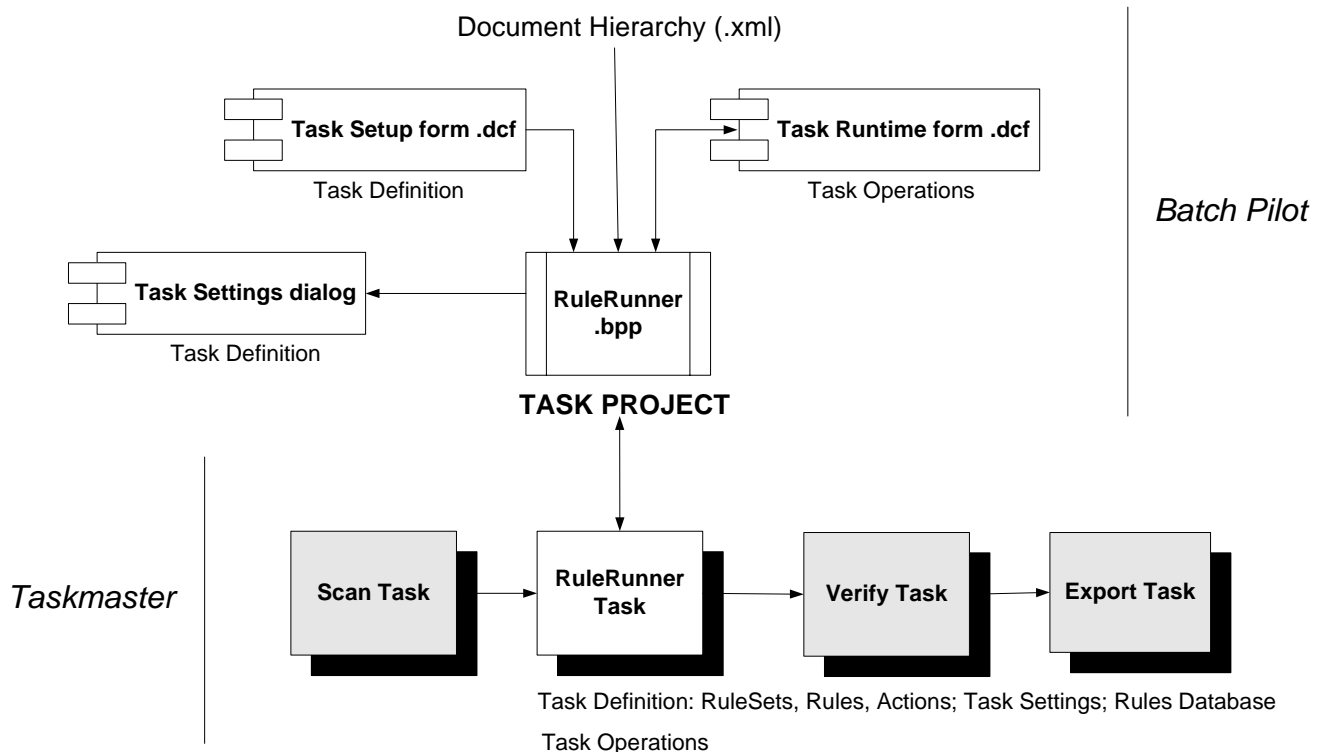
Members of a **RuleSet Hierarchy** define processing rules that determine how tasks operate, and **bind** the rules to individual objects of the Document Hierarchy.

The components of an application's **Workflow Hierarchies** – **workflow, jobs** and **tasks** – incorporate specifications of both the Document Hierarchy and of the RuleSet Hierarchies.

The lower portion of the chart shows the tasks of an application's Main job – the job that takes care of paper or images from the moment they enter the Scanning queue right up until the data on a *source* page has been recognized, verified, validated and exported.

- ✓ Chapter 2 of the *Taskmaster Administrator's Guide* explores all aspects of the **Datacap Taskmaster** architecture. (Page 12 is a reference to supporting documentation.)

The chart below demonstrates the principal ways in which *Batch Pilot* and its development environment contribute to - and participate in - a **Datacap Taskmaster** application.



Here, *Batch Pilot* is responsible for constructing the **Task Project** that is the foundation for a task's definition – its *setup* procedures – and for that task's operations...its *runtime* procedures. After *Batch Pilot* has successfully assembled the elements of the Task Project, *Taskmaster* can proceed to define and run the task itself!

- ✓ Two **Datacap forms (.dcf)** occupy the core of a Task Project:
 - The *setup* form is used by Administrators of *Taskmaster's* Task Definition process to assign important specifications to a new task.

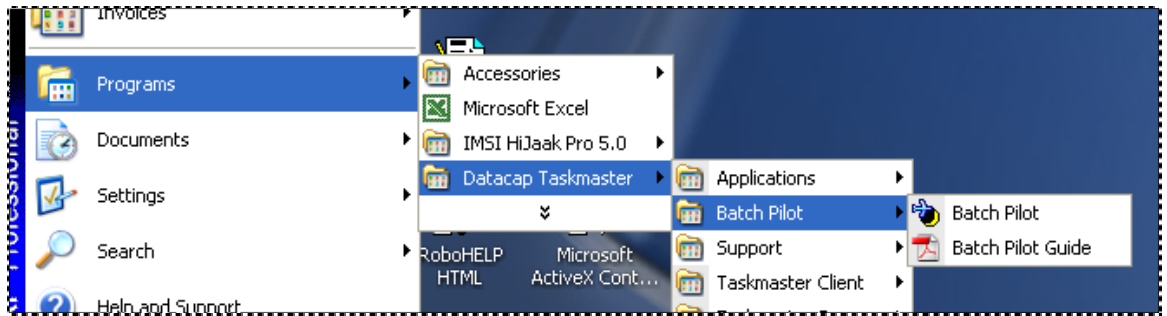
- The *runtime* form produces a dialog that is the interface with the operator who is actually running the task. Some *runtime* dialogs appear briefly, then disappear; others, such as a Verify task's *Data Entry* panel, occupy the operator's screen until Verification of a page is complete (see the examples below and on the next page.)

How to Access Batch Pilot

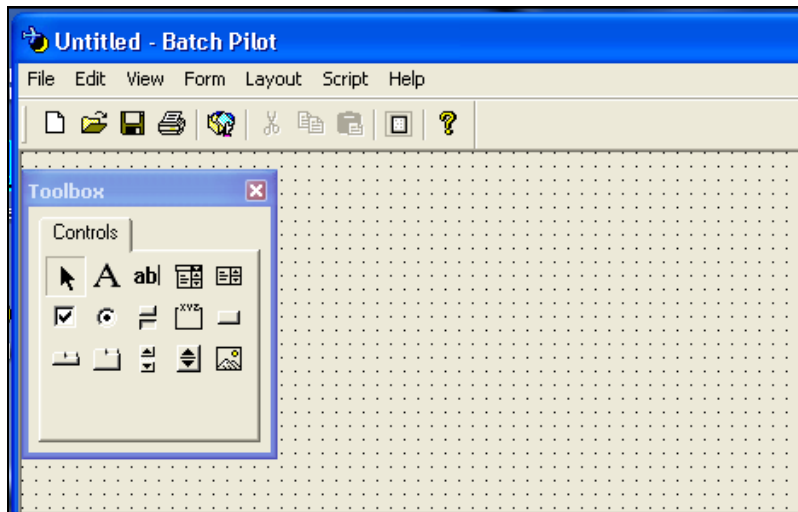
For a close-up look at *Batch Pilot* and two sample forms, take these steps *after* you are sure that **Datacap Taskmaster** has been installed on your computer (Page 7).

Step	Action
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1. Click on your Windows Start button and select **Datacap Taskmaster** from the **Programs** options.
2. Open the **Batch Pilot** folder and select **Batch Pilot**.



3. Briefly study the contents of the *Batch Pilot Window* when it appears on your screen (Chapter 2 describes every detail of this window.)

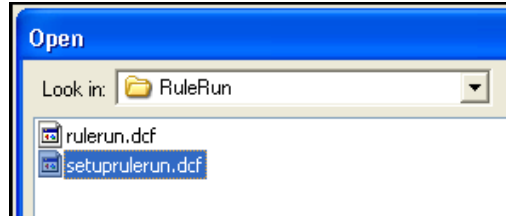


4. Select **Open Form** from the **File** menu. Use the tools of the *Open File* dialog to move to your **Datacap** directory's **BPilot** folder.

How to Access and Review a Batch Pilot Form (continued)

Step	Action
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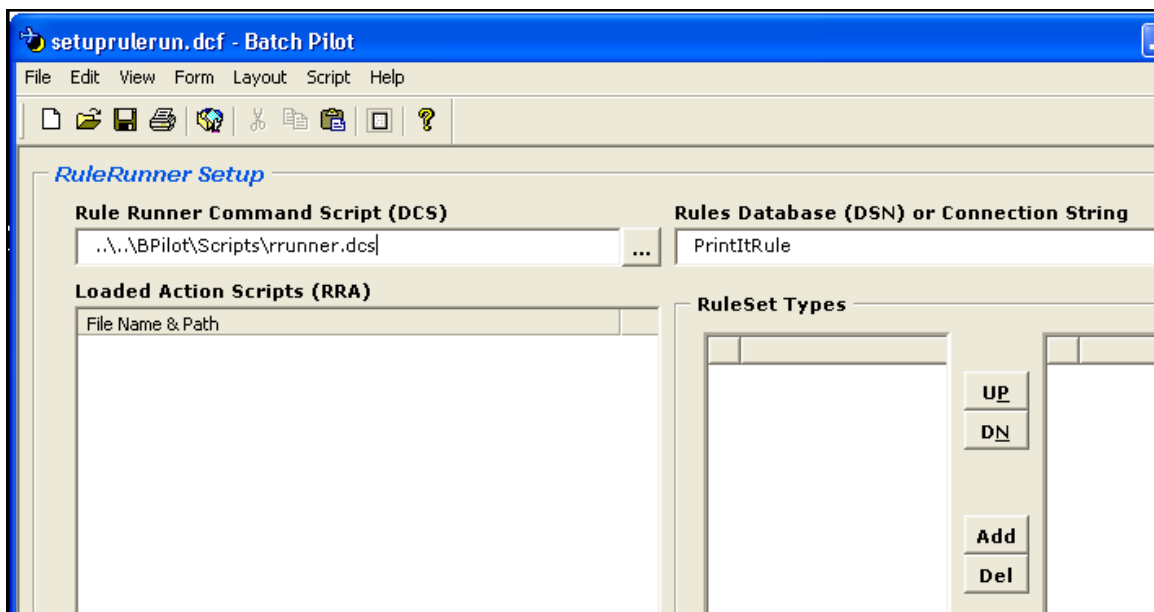
- Open the **RuleRun** sub-folder, and highlight the **setuprulerun.dcf** form:



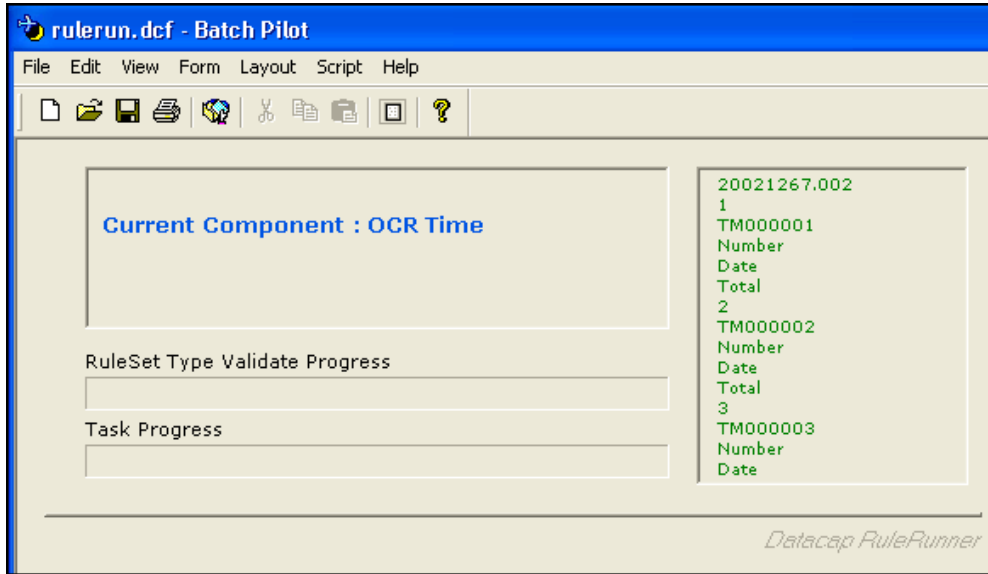
- When this task *setup* form appears in the *Batch Pilot Window*, un-select **Design** in the **Form** menu for a clearer look at the form (illustrated below.)
- Afterwards, click on the **X** icon in the window's upper right-hand corner to close the form.

You can follow the same steps to open the *runtime* form used by an application's *RuleRunner* tasks. These are tasks that run in the processing background, typically without operator intervention. As a result, the *runtime* dialog often has little exposure (see the example at the top of the next page.)

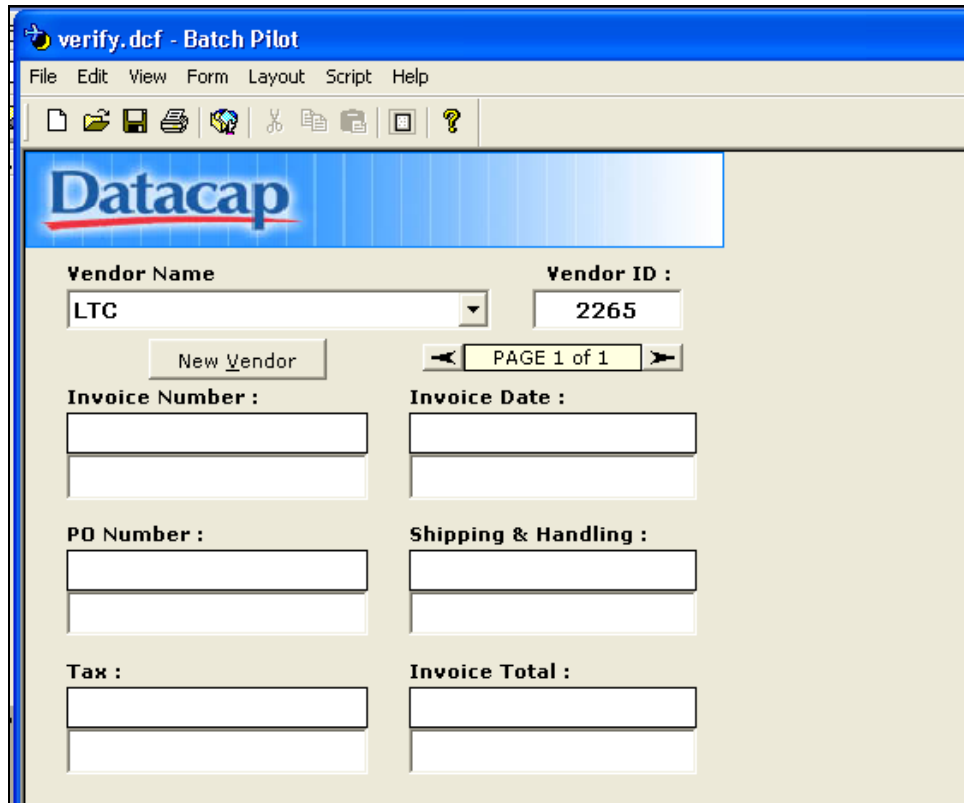
In contrast, **verify.dcf** in the **Verify** sub-folder of the **BPilot** folder is an example of a Verify task's *Data Entry* panel that requires operator participation (see the illustration at the bottom of the next page.)



RuleRunner Tasks – *Setup dialog*



RuleRunner Tasks – Runtime dialog



Invoice Application - Data Entry panel

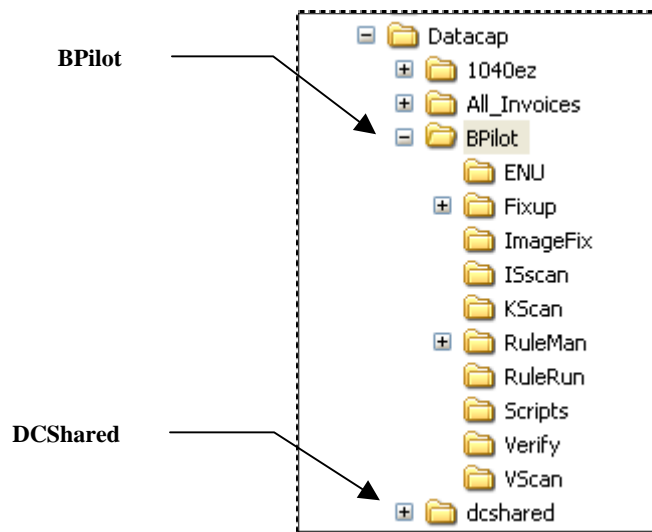
The *Guide to Batch Pilot* shows you how to define a Task Project and provide it with *setup* and *runtime* forms of all sorts.

Batch Pilot Installation

Batch Pilot is a standard feature of a **Datacap Taskmaster** configuration – and is installed as part of the Datacap Taskmaster Client Installation process. For a complete explanation of the Installation process, see the Taskmaster 7.5 Installation and Configuration Guide in the **Docs** folder of the **Datacap** directory.

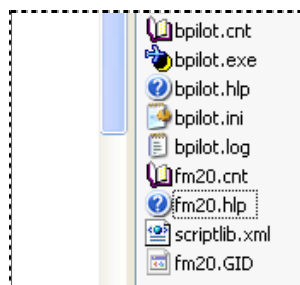
Batch Pilot Folders and Files

Batch Pilot files are in two folders of the **Datacap** directory: **BPilot** and **DCShared**.



The **BPilot** directory has files of three types:

- ◆ **Unassigned.** These include *Batch Pilot* code (.exe) and settings (.ini) – as well as *Batch Pilot* Help files (**bpilot.hlp** and **bpilot.cnt.**) The Log file (**bpilot.log**) maintains an ongoing log of *Batch Pilot* activities; the Script Library (**scriptlib.xml**) has scripts that *Batch Pilot* uses to manage its design and task processing procedures. The **fm20** files comprise a convenient *Microsoft Forms Design Reference*.



- ◆ **Task Forms and Scripts.** Most folders contain “stock” *setup* and *runtime* forms – and even special-purpose scripts - for specific tasks.
- ◆ **ENU Utility.** Files in this folder comprise an *Enhanced Notification Utility (ENU)* that solicits information about the current state of your application, and e-mails this data to individuals on an *ad hoc* basis or according to a schedule.
- ◆ **Rule Manager.** *Rule Manager* creates an application’s fingerprints and rules, and manages its Document Hierarchy. *Rule Manager* and the **Rule Manager Window** are *Batch Pilot* products: the **RuleMan** folders contain *Rule Manager* forms, and the window’s dialogs and controls.
- ◆ **Actions.** The **Scripts** folder holds Actions files (.rra) with the actions that are assigned to the rules that govern a task’s operations. This folder also has the Actions Help file that provides instant and complete descriptions of all actions.

Two files in the **dcshared** directory are immediately associated with *Batch Pilot*:

- **bpilot.dll** is a library of *Batch Pilot* programs.
- **bpilot.ini** is a second Settings file, with a broader scope than the file in the **BPilot** directory.


Typographic and Terminology Conventions

This book uses the following typographic and terminology conventions.


Convention:	Example:
Menu names are in Bold type.	From the File menu...
Menu items are in Bold type.	From the File menu, select the New Form item.
Dialog names are in <i>BoldItalic</i> type.	The <i>Hot Key</i> dialog requires a key combination.
Window names are in <i>BoldItalic</i> type.	The <i>Batch Pilot Window</i> has multiple modes.
Field names are in Bold type.	Enter a Security Code in the Password field.
Object <i>types</i> within a Document Hierarchy are in Bold type; object <i>names</i> are in <i>Italics</i> .	<i>Number</i> is a Field object of the <i>1040EZ</i> Document Hierarchy.
Button names are in Regular type.	Click on the OK button.
Drop-down list items are in <i>Italic</i> type.	The <i>Verify</i> Task Module is an option in the Task Module drop-down list.
Datacap product and application names are in <i>Italic</i> type.	<i>Batch Pilot</i> , <i>Rule Manager</i> and <i>Taskmaster</i> are Datacap Taskmaster products. <i>1040EZ</i> and <i>Invoice</i> are applications.

If You Need Help

Here is the number for **Datacap Taskmaster** technical support:

 **914-259-1200**

Please note that if you need to **fax** Datacap technical support, the fax number is:

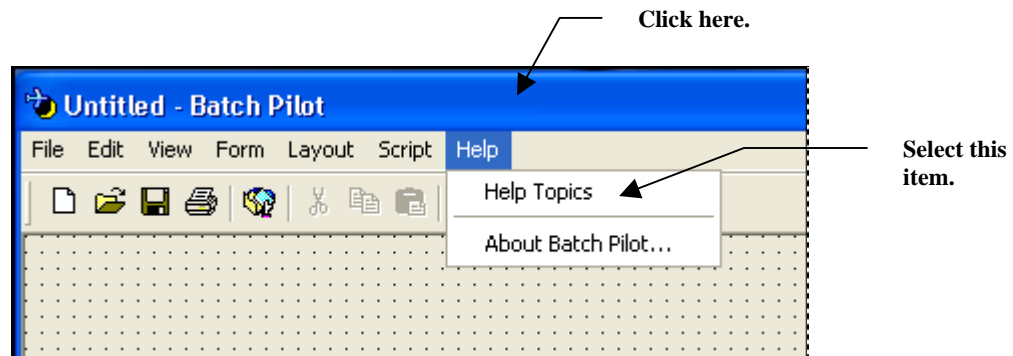
 **914-366-0500**

If you want to **e-mail** Datacap technical support, here is the e-mail address:

 support@datacap.com

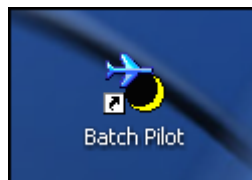
Batch Pilot Help

Clicking on the *Batch Pilot Window's* **Help** menu opens a Help file covering every *Batch Pilot* topic.



For additional assistance, we **strongly recommend** that you set up a **Batch Pilot** shortcut on your Windows desktop.

- ◆ Follow the steps on Page 4 to access the Start button's **Batch Pilot** folder and the **Batch Pilot** icon.
- ◆ Right-click on the icon and select **Send to Desktop (Create Shortcut)** to add the shortcut:



About this Book

The *Guide to Batch Pilot* has the following chapters.

Chapter 1: Welcome

Chapter 1 introduces you to *Batch Pilot* and to this text.

Chapter 2: The Batch Pilot Window

This chapter provides an overview of the *Batch Pilot* environment, and carefully examines the *Batch Pilot Window* in its development and operating modes. The chapter also explains the window's menus and toolbars, as well as scripting devices and shortcuts.

Chapter 3: Task Forms

Chapter 3 describes the Datacap form (.dcf) in general, and the design and development of a task's *setup* and *runtime* forms in particular.

Chapter 4: Task Projects

Chapter 4 examines the role of a Task Project; the contents of a Task Project file (.bpp); the nature of the Datacap forms (.dcf) that belong to a Task Project; and specifications in a Task Project's *Task Settings* dialog.

Chapter 5: Data Entry Panels

This chapter summarizes the *Batch Pilot* procedures that automatically create an application's *Data Entry* panel – a Verify Task Project's *runtime* form.

Glossary

The Glossary defines key *Batch Pilot* terms.

Index

This is an alphabetical listing of topics and sub-topics covered by the *Guide to Batch Pilot*.

Supporting Documentation

The table below lists additional **Datacap Taskmaster** documentation with particular relevance to your *Batch Pilot* opportunities and experience.

- ✓ You will find PDF versions of these texts in the **Docs** folder of your configuration's **Datacap** directory.

Text	Chapter	Description
<i>Taskmaster Administrator's Guide</i>	2	A thorough examination of the <i>Taskmaster's</i> architecture...and of its contributing components.
<i>Taskmaster Installation and Configuration Guide</i>		Installation of Datacap Taskmaster – including <i>Batch Pilot</i> .
<i>Guide to Taskmaster Rules</i>	2	How to set up a new <i>Taskmaster</i> application. Every <i>Taskmaster</i> application – current, new or proposed – relies extensively on <i>Batch Pilot</i> for its configuration and operations.
<i>Guide to Taskmaster Rules</i>	3	The nature and definition of an application's Document Hierarchy, and of its Batch , Document , Page and Field objects. Each <i>Batch Pilot</i> Task Project belongs to a single application – and the application's Document Hierarchy is a core property of the Task Project (see Chapter 4).
<i>Guide to Taskmaster Rules</i>	5	How RuleSets, rules and actions govern task operations.
<i>Guide to Taskmaster Rules</i>	6	Setup procedures that link a Task Definition to its <i>Batch Pilot</i> Task Project – and the general nature of the task's resulting <i>setup</i> and <i>runtime</i> procedures.
<i>Guide to Taskmaster Rules</i>	7-10	<i>Batch Pilot's setup</i> and <i>runtime</i> components of Task Projects in four categories: Scan, RuleRunner, Verify and Fixup. Individual chapters pay special attention to the forms used by these Task Projects and their tasks. Chapter 10 looks carefully at the development and modification of the Verify tasks' Data Entry panels.
<i>Rule Manager Reference</i>	3	The Rule Manager Window . This window was designed and developed in the <i>Batch Pilot</i> workshop. It features the tools an Administrator uses to assemble an application's fingerprints and define its rules.

Text	Chapter	Description
<i>Rule Manager Reference</i>	4	A guide to all actions that can be assigned to the rules that determine the nature and scope of a task's procedures. These explanations are repeated in an Actions Help file that is immediately available from the <i>Rules</i> panel of the Rule Manager Window .
<i>Taskmaster Windows & Dialogs Reference</i>	All	A handy, comprehensive guide to the windows and dialogs on the <i>Taskmaster</i> side of your Datacap Taskmaster configuration. The information in this reference is also available in <i>Taskmaster Help</i> . For a list of all topics, press the Help icon in the Taskmaster Window ; for topics covering the current window or dialog, press your keyboard's F1 key.
<i>Guide to Datacap Taskmaster Documentation</i>	All	An interactive listing of all texts and their chapters, with instant access to each text.
<i>Summary Index of Documentation Topics</i>	All	An interactive list of topics covered throughout Datacap Taskmaster documentation, with instant access to the relevant text.

- ✓ Programming in the *Batch Pilot* environment requires access to - and an understanding of - the **Datacap Taskmaster API**. Objects of this API are part of the **Datacap Developer's Kit (DDK)**. DDK documentation provides an overview of each object, as well as explanations of an object's properties and methods.