
The Batch Pilot Window

The *Batch Pilot Window* is the site of your Task Project development and testing activities – and is the workshop you’ll use to assemble, modify and script forms that becomes a task’s *setup* and *runtime* dialogs.

In addition:

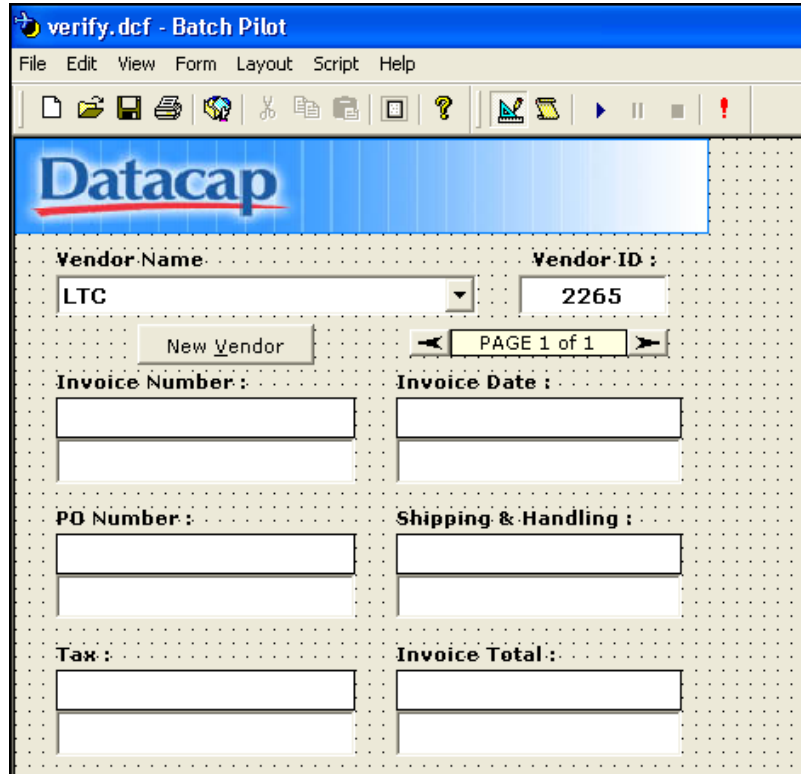
- *Batch Pilot’s* Task Setup role allows administrators to define the tasks that are part of a *Taskmaster* workflow.
- Its Operations role tracks the progress of tasks developed inside the *Batch Pilot* workshop, and provides authorized Data Entry operators with immediate access to the images and information a batch contains.
- Tools of the *Batch Pilot Window* assemble and manage powerful utilities such as *Rule Manager* and its *Rule Manager Window*, and the *Document Hierarchy Setup* window.

Chapter 2 examines the elements of the *Batch Pilot Window* in various modes as it covers these topics:

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Task Projects and Task Definitions

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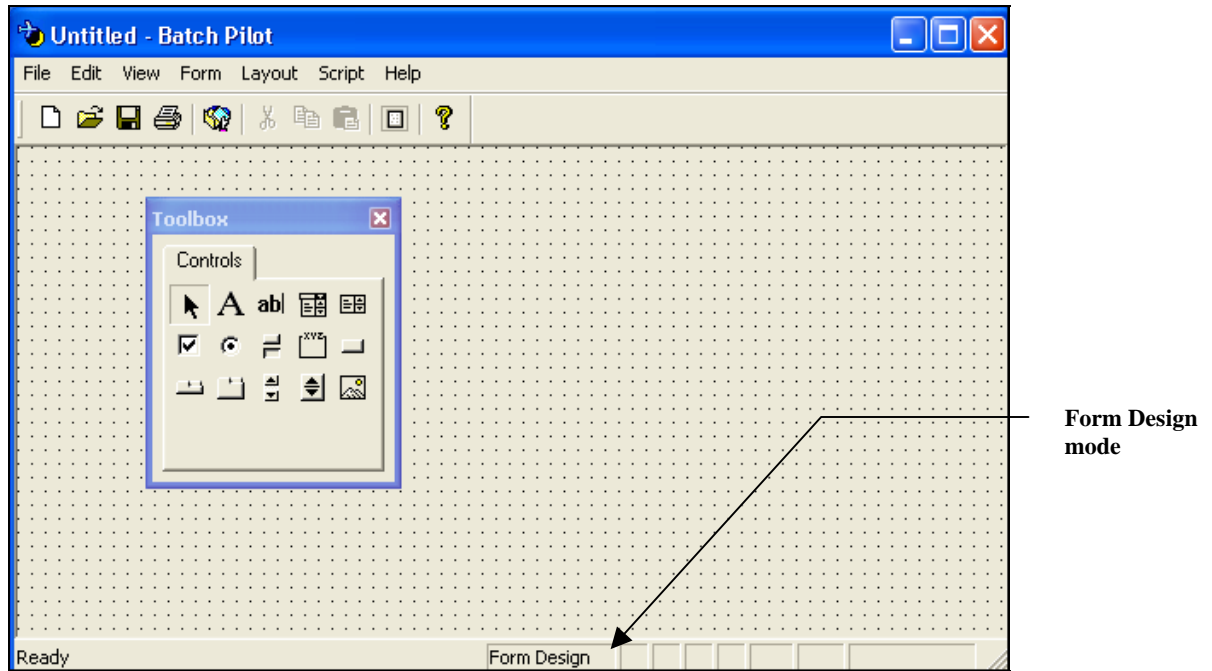


Batch Pilot Window
Invoice Application: Data Entry Panel

Introduction

Snapshots of the *Batch Pilot Window* are below and on the next few pages.

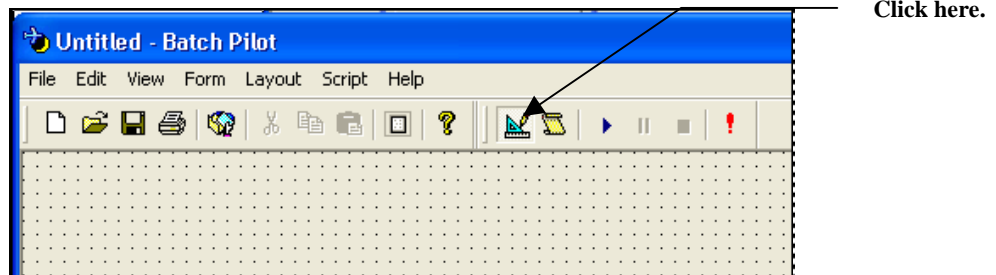
Here’s how the window looks the moment you access *Batch Pilot* using the **Programs** options of your Windows Start button or by double-clicking on a **Batch Pilot** shortcut you’ve placed on your Windows desktop (Chapter 1 describes both approaches.)



Batch Pilot Window – Form Design Mode

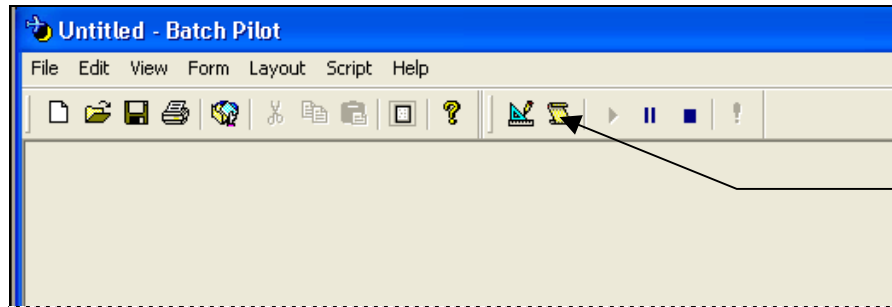
In the example above, the *Batch Pilot Window* opens with a “clean” **Datacap form (.dcf)**. At this very early stage, the form lacks controls, scripts, even an identity. However, there is a **Development Toolbox** filled with drag-and-drop controls. You can use this toolbox and its full array of procedures to design, assemble and test a form without delay (Chapter 3).

- ✓ Note, too, that the window’s default **Main** toolbar has only a few standard Windows icons. For more variety, select **Form** from the **View** menu’s **Toolbar** items – and move the **Form** toolbar up next to the **Main** toolbar.



Task Projects and Task Definitions

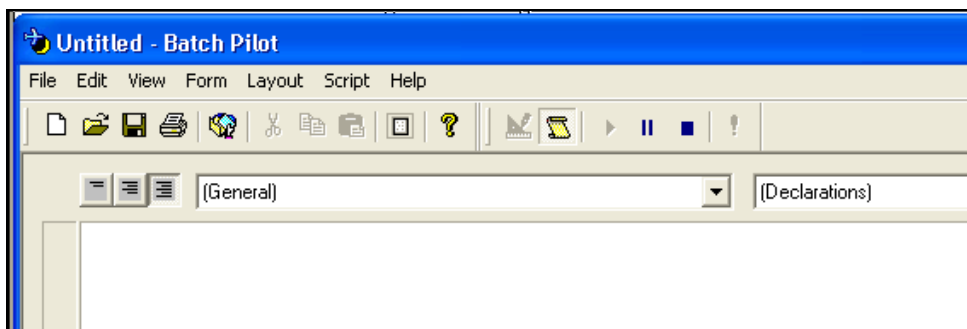
Now, if you un-toggle the **Design** icon, the window will go into *Form Test* mode as the dotted background gives way to a flat background:



Click here for
scripting

Batch Pilot Window – Form Test Mode

If you click on the **Scripting** icon, *Batch Pilot* moves into the *Scripting* mode that developers use to prepare and test a form's code.



Batch Pilot Window – Form Scripting Mode

- ✓ The examples above show how the *Batch Pilot Window* functions as a standalone development workshop.

However, the *Batch Pilot Window* also serves the *Taskmaster* side of your **Datacap Taskmaster** configuration as it puts together an application's Task Projects; assigns forms to each project (Chapter 3); participates in the later stages of Task Definition; and supplies the User Interface for a task when it runs (Chapter 4).

- ✓ **Important!** The *1040EZ* training application is the source of most examples and illustrations in this chapter and throughout the text. To open this *nearly indestructible* application:
 1. Be sure that your Taskmaster Server Service is up and running.
 2. Select **Datacap Taskmaster** from your Windows Start button's **Programs** options.
 3. Open the **Applications** folder.
 4. Open the *1040EZ* sub-folder: double-click on **1040EZ Client**.
 5. Enter your Security codes in the *Please Login* dialog.

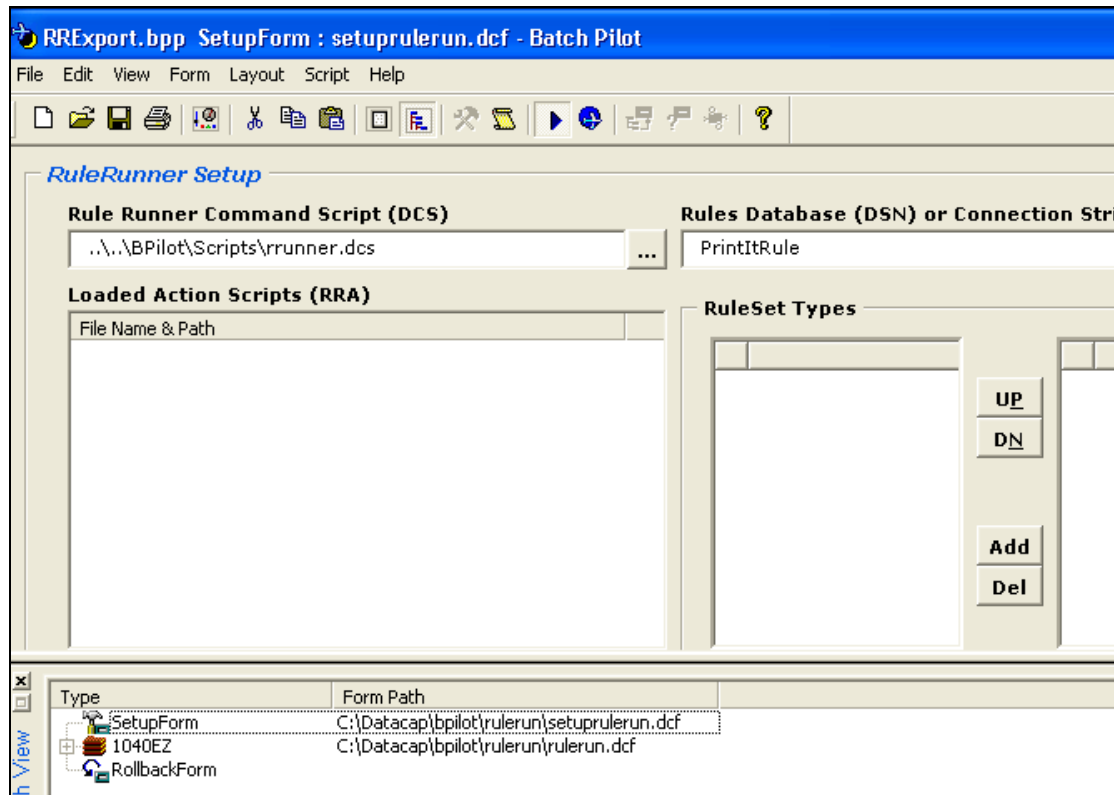
Task Projects and Task Definitions

A **Task Project** is the foundation for the *setup* and *runtime* components of a task such as the *1040EZ* application's Export task. The Export Task Definition designates the applicable Task Project.

A Task Project is a file (.bpp). In this case, the file's name is **RRExport.bpp**, and you'll find it in the *1040EZ* application's **Process** directory.

For a first look at the *1040EZ* Export Task Project, take these steps:

Step	Action
1.	Open <i>Batch Pilot</i> (Page 3) and the <i>Batch Pilot Window</i> .
2.	Select Open Project from the <i>Batch Pilot Window</i> 's File menu.
3.	Use the tools of the <i>Open File</i> dialog to access the Datacap/1040EZ/Process folder and to open the RRExport.bpp Task Project file.
4.	Un-select Design from the window's Form file for a clearer look at the project and its <i>setup</i> form within the window.



Batch Pilot Window – RRExport Task Project

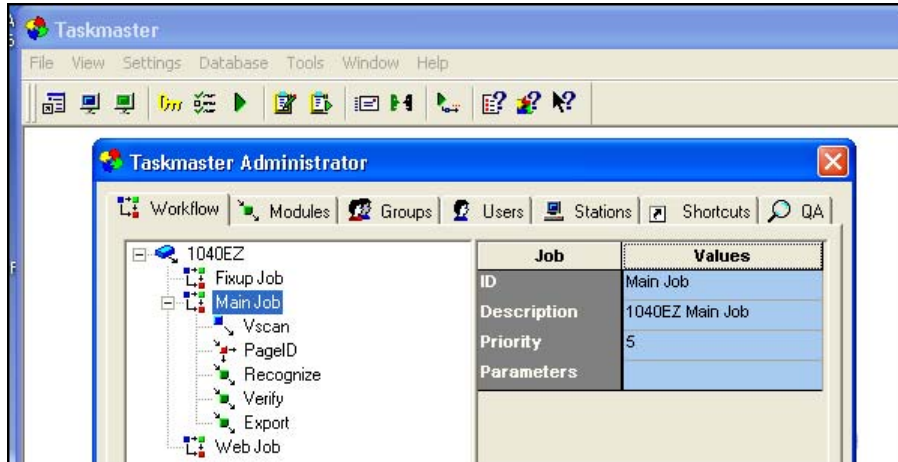
- ✓ Chapter 4 shows you how to use the *Batch Pilot Window* to assemble a Task Project (.bpp).

Task Projects and Task Definitions

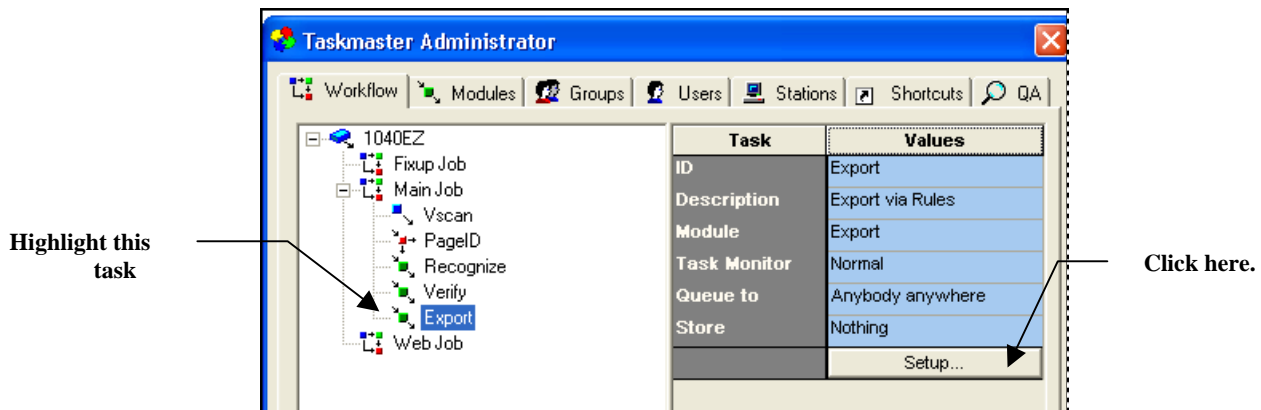
A different sort of *Batch Pilot Window* appears when an Export task that employs this Task Project is actually defined as a member of a *Taskmaster* job. To trace this sequence:

Step	Action
------	--------

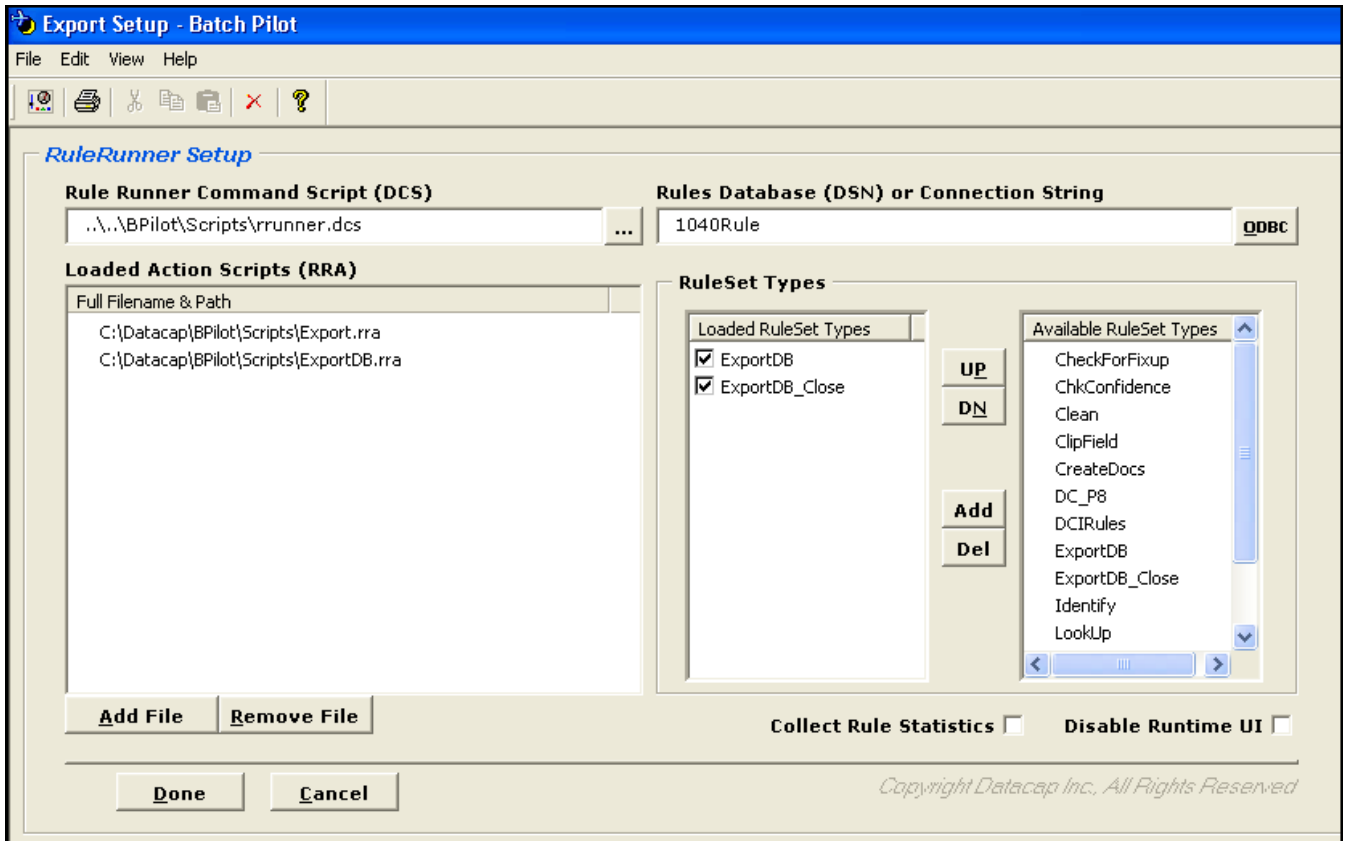
1. Open the *1040EZ* Taskmaster Client (Page 4).
2. Select **Workflow** from the **Settings** menu of the *Taskmaster Window*: the *Taskmaster Administrator's Workflow* tab will appear on your screen



3. In the **Components** list on the left, highlight the Main job's Export task – and press the Setup button on the right.



4. When the *Setup* dialog for the Export Task Definition appears inside the *Batch Pilot Window* (illustrated on the next page), study the settings in its principal fields.



1040EZ – Export Task Definition

- Here, the application’s Administrator uses the *Batch Pilot Window* to assign previously defined **rules** to the task – to the *1040EZ* Export task, in this case. (Chapter 4 introduces the Task Definition process; Chapter 6 of the *Guide to Taskmaster Rules* reviews all aspects of Task Definition.)

Take a moment to compare the illustration of the *Batch Pilot Window* above to the example on Page 5. Note the differences in menu listings, and in the lower portion of the windows’ structures. The format and content of the *Batch Pilot Window* changes in response to its role: upcoming descriptions of the window take these changes into account.

Structure of the Batch Pilot Window

The *Batch Pilot Window*'s basic design is not unusual.

There is a **Title Bar** at the top, with formatting options in the upper right-hand corner (*Minimize*, *Maximize* and *Close*.) The Title Bar identifies the current form (.dcf), Task Project (.bpp) or task (when *Batch Pilot* is in an *operating* mode.)

Menus and **toolbars** line up just below the Title Bar. **Alert!** The list of menus and the availability of toolbars change according to *Batch Pilot*'s mode.

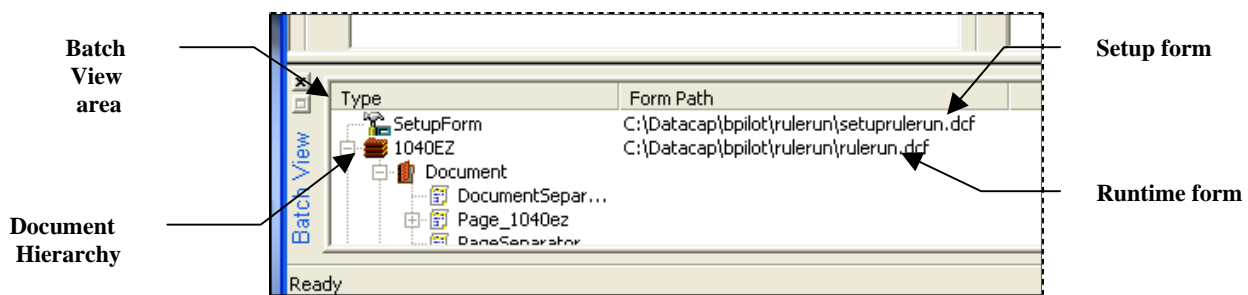
The **Data Area** is home to a form's design and development procedures, and to task *setup* and *runtime* dialogs.

The **Status Bar** at the bottom specifies the window's current activity (*Form Design* or *Test*, for example) and its status (*Ready* and *Start Script Editor* are examples.) Often, the Status Bar contains supporting information such as your cursor's location within a script.

Two facets, however, distinguish the *Batch Pilot Window*:

- The **Batch View** area in the window's lower left-hand corner lists the contents of the current batch when a task is running. In the representation of a Verify task's *Data Entry Panel* on the next page, this area shows a batch with two documents, and each document has one page.

Because a Task Project uses Datacap forms (.dcf) as design foundations (see the previous section), the project requires links to individual *setup* and *runtime* forms. When you are assembling a Task Project (Chapter 4), the **Batch View** area contains a **Setup Tree** with three **nodes**. *SetupForm* at the top designates a Task Project's *setup* form. The application's Document Hierarchy is immediately below. Usually – but not always! – the *runtime* form of a task Project is bound to the Document Hierarchy's **Batch** object – *1040EZ*, in the illustration. A *RollbackForm* node is at the bottom of the tree; a form assigned to this (rarely used!) node appears on an operator's screen when a task based on the Task Project rolls back a batch.



- Images of *source* pages play an important role in certain tasks and in configuration tools such as the *Rule Manager Window*. The *Batch Pilot Window's Image View* area displays images at various magnifications, and offers developers and users a complete set of Image Management implements.

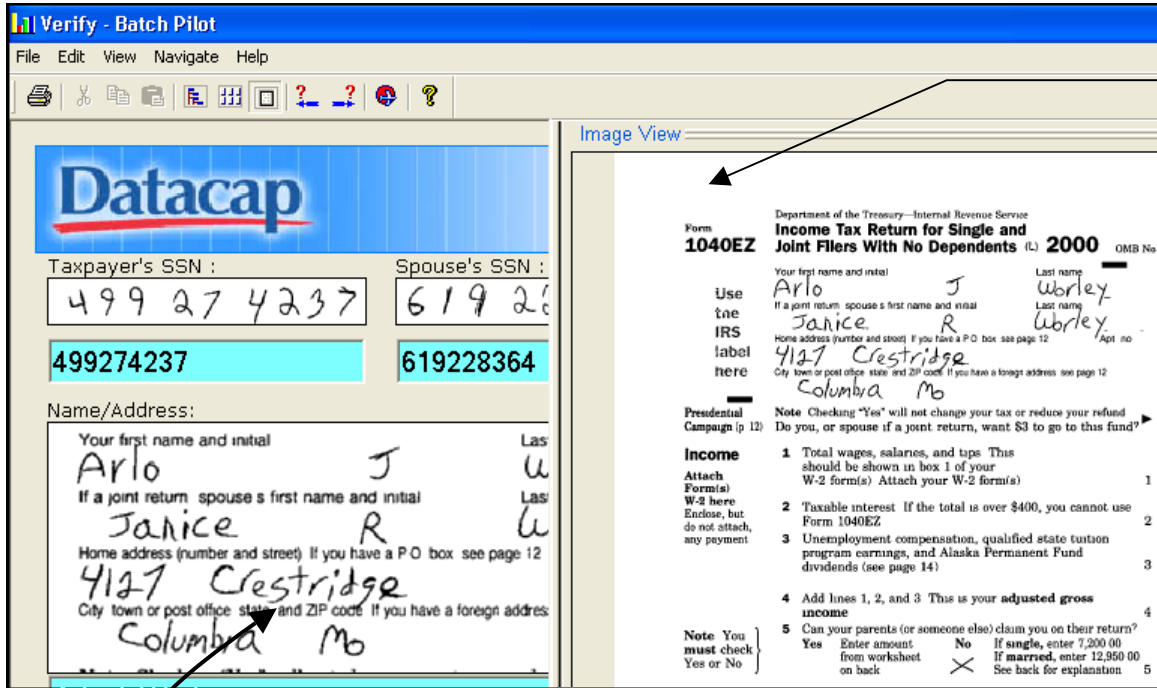
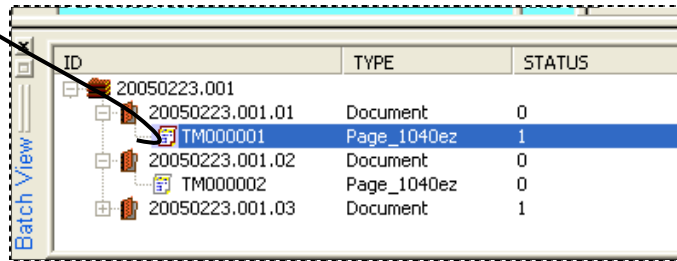


Image View area

1040EZ Data Entry Panel



1040EZ Data Entry Panel – Batch View area

Both the **Batch View** area and the **Image View** area are instantly accessible if you click on the **Setup Tree** and **Image View** items, respectively, in the **File** menu.

Menus of the Batch Pilot Window

The tables below and on the next few pages describe all items of the *Batch Pilot Window's* standard menus. **Alert!** Special-purpose menus (such as **Navigation**) appear only when the window is in a particular mode such as *Operations*. In addition, an item within a menu may be “grayed out” if the window’s mode does not require it.

File Menu

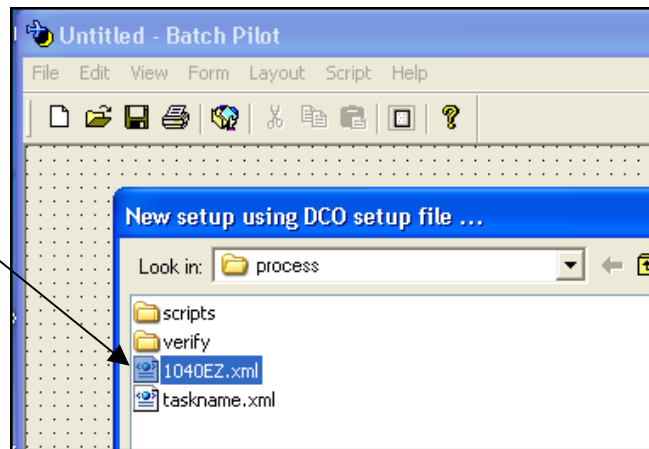
Although this standard Windows menu is a mainstay of the *Batch Pilot Window* in all its modes, the availability of individual items changes according to mode.

Item	Keyboard	BP Mode(s)	Comment
New Form	Ctrl + N	<i>Form Development</i>	Places a blank Datacap form in the window’s Data Area, along with the Development Toolbox (Page 29). A Datacap form is the foundation of a <i>Batch Pilot</i> window or dialog. A Datacap form is also a file (.dcf).
Open Form...	Ctrl + O	<i>Form Development and Testing</i>	Retrieves an existing Datacap form and displays it in the <i>Batch Pilot Window</i> , in <i>Design</i> mode. Remember! For a clear look at a form in the window, un-select the Design item in the Form menu.
Save Form	Ctrl + S	<i>Form Development and Testing</i>	Saves changes to the Datacap form (.dcf) you’re working on. Many Datacap forms are stock forms: they can be assigned to Task Projects of any application, and their files (.dcf) are usually in a folder of the Datacap directory’s BPilot sub-directory (Chapter 3). However, some forms – those of a Verification task , for example – are application-specific. Their files are usually in the application’s Process directory.

File Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Save Form as...		<i>Form Development</i>	Duplicates all attributes of the current form except its name, and stores the form as a file (.dcf) in a directory and folder you specify. This option can save you considerable time and effort if you use it cautiously.
New Project...	Ctrl + Alt + N	<i>Task Project Setup</i>	Initiates the steps that define a Task Project (Chapter 4), and generate a Project file (.bpp). Very important! When you select this item, <i>Batch Pilot</i> asks you to identify the file containing the application's Document Hierarchy (see the example below, and Chapter 4.)
Open Project...	Ctrl + Alt + O	<i>Task Project Setup</i>	Opens an existing Task Project. Important! In most cases, a Datacap form is a <i>Batch Pilot</i> entity and its file (.dcf) is in a folder of the Batch Pilot directory. However, a Task Project that uses the form belongs to a particular application (even if it is a test application). As a result, Task Project files (.bpp) are usually in the application's Process directory.

Document Hierarchy file (.xml)



New Project – Document Hierarchy

File Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Save Project ...	Ctrl + Alt + S	<i>Task Project Setup</i>	Saves the settings of a new Task Project and places its file (.bpp) in a directory you specify, or updates the settings of an existing project that's currently open in the Batch Pilot Window . Remember: a Task Project belongs to an application, and its file is usually stored in an application's Process directory.
Save Project as...		<i>Task Project Setup</i>	Duplicates all attributes of the current project except its name, and stores the new Project file (.bpp) in the directory you specify – typically, in the application's Process directory.
Print...	Ctrl + P	<i>Form Development and Testing</i>	Prints scripts and logs.
Print Preview		<i>Form Development and Testing</i>	Previews selected pages of a script or log.
Print Setup...		<i>Form Development and Testing</i>	Lists available printers.
Task Settings...	Ctrl + T	<i>Task Project Setup</i>	Accesses a Task Project's Task Settings dialog (Chapter 4 and <i>Batch Pilot Help</i>). The tabs of this dialog contain important settings and parameters <i>Taskmaster</i> uses when the <i>Batch Pilot project</i> becomes a <i>Taskmaster task</i> .
Test Setup	Ctrl + R	<i>Test Setup</i>	Checks the accuracy and completeness of a Task Project's setup specifications (Chapter 4).

File Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Simulate Task	Ctrl + M	<i>Test Operations</i>	<p>Checks links between the Task Project's Document Hierarchy and its runtime form, then tests the project's ability to run a task within the <i>Taskmaster</i> environment.</p> <p>Important! When you select this option, <i>Batch Pilot</i> may ask you to identify a Page file (.xml) that was generated by the task preceding this task in the <i>Taskmaster</i> workflow. If you were testing the runtime form of an Export Task Project, for example, you would probably choose a verify.xml file from a test batch.</p> <p>Chapter 4 shows you how to use <i>Batch Pilot's</i> Task Simulator feature.</p>
Quit Task	Ctrl + Q	<i>Task Operations</i>	After a proper warning, stops a task, and places the batch on a <i>Hold</i> status.
Recent Forms	n/a	<i>Form Development and Task Project Setup</i>	Provides access to Datacap forms (.dcf) you've worked with recently.
Recent Projects	n/a	<i>Form Definition and Task Project Setup</i>	Provides access to Task Projects (.bpp) you've worked with recently.

Edit Menu

Although these standard Windows editing procedures are generally available in each mode, the circumstances under which you can use them are limited.

Item	Keyboard	BP Mode(s)	Comment
Undo	Ctrl + Z	<i>All</i>	Reverses your most recent action within the <i>Batch Pilot Window</i> . The action might involve a project or a form...a script or a control. Or it might reverse a step you've taken in an environment such as the <i>Rule Manager Window</i> .
Cut	Ctrl + X	<i>All</i>	Deletes a highlighted setting or text – even a control – and places it on the <i>Batch Pilot</i> clipboard.
Copy	Ctrl + C	<i>All</i>	Copies a setting, text or control and places it on the <i>Batch Pilot</i> clipboard.
Paste	Ctrl + V	<i>All</i>	Pastes a setting, text or control from the clipboard into the target element of the <i>Batch Pilot Window</i> .

View Menu

The contents of the **View** menu change significantly according to *Batch Pilot's* mode.

Item	Keyboard	BP Mode(s)	Comment
Toolbars	n/a	<i>All except Task Operations (below)</i>	<p>Lists the toolbars you can use for Task Development, Project Specifications, and Form Design and Testing.</p> <p><i>Main</i> is the window's standard toolbar and is available for all procedures</p> <p><i>Form</i> contains icons you'll use to set up and test Datacap forms.</p> <p><i>Layout</i> deals with the placement and properties of individual controls within a form.</p> <p><i>Script</i> provides you with a number of scripting tools.</p> <p>(Page 26 describes the toolbars of the <i>Batch Pilot Window</i>.)</p>
Toolbar	Ctrl + Alt + M	<i>Task Operations</i>	Displays the <i>Batch Pilot Window's</i> standard toolbar for Task Operations (Page 33).
Status Bar	n/a	<i>All</i>	A toggle switch to display or hide the <i>Batch Pilot Window's Status Bar</i> .

View Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Setup Tree (Task Project Setup mode)	Ctrl + Alt + S	Task Project Setup Task Operations	Opens and closes the Batch Pilot Window's Batch View area (illustrated on Page 8). 1.) When you are setting up a Task Project (Chapter 4), the items in this area connect the project to its setup and runtime forms. 2.) When a task such as Verification or FixUp is running, this area lists the documents and pages in the current batch. Alert! The Batch View area is not available when you define a task within <i>Taskmaster</i> , assign it to a job, and then access the Batch Pilot Window to link the task to its Batch Pilot Task Project Specifications (Chapter 4).
Batch Tree (Task Operations mode)			
Thumbnail	n/a	Task Operations	Shows or hides thumbnails of the images in a batch.
Image View	Ctrl + Alt + I	Form Development and Testing Project Setup and Testing	Opens and closes the Batch Pilot Window's Image View area (illustrated on Page 8.) This area is a development tool you'll use to determine if a window or dialog can successfully display the image of a scanned page, of a fingerprint, or of any other acceptable Image file format.
Log Viewer	n/a	Task Setup, Task Operations	Shows or hides Batch Pilot's Log Viewer dialog during Task Definition, and Task Operations if the task's dialog is not hidden.

View Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
AutoSave	n/a	<i>Task Operations</i>	Remembers the <i>Batch Pilot Window's</i> current size and scale.
Super Snippet	Ctrl + S	<i>Verify Task Operations</i>	Displays the magnified image of a single field of a <i>source</i> page after the Data Entry operator has selected the field.
Keep SS Visible	n/a	<i>Verify Task Operations</i>	Automatically displays a Super Snippet next to any field the Data Entry operator selects.

Form Menu

The items in this menu help with the development and testing of Datacap forms (Chapter 3) – and with the setup of a Task Project (Chapter 4).

Remember. Although most Datacap forms are tightly linked to a task’s *setup* or *runtime* procedures, you can use *Batch Pilot* to assemble forms that do not have task affiliations. The **Rule Manager Window** is one example: a full explanation of this very important window is in Chapter 3 of the *Rule Manager Reference*.

- ✓ Most items in this menu are duplicated by toolbar icons (Page 26). Be sure to use the **View** menu’s **Toobars** selection to place these toolbars in convenient locations within the **Batch Pilot Window**.

Item	Keyboard	BP Mode(s)	Comment
Design	n/a	<i>Design, Test</i>	<p>A toggle switch that places a form in <i>Design</i> mode (checked) or <i>Test</i> mode (unchecked).</p> <p><i>Design</i> mode allows you to add, remove, and modify controls; write, edit and test scripts; “bind” the form to other forms and “external” objects; and set up one or more hot keys for a form’s user.</p> <p><i>Test</i> mode shows you what the form looks like when it is active, and gives you a chance to assess the behavior of individual controls.</p>
Toolbox	n/a	<i>Design</i>	<p>Displays or hides the Batch Pilot Development Toolbox.</p> <p>You’ll use this toolbox to select controls and place them on a form.</p>
View Code	n/a	<i>Design</i>	<p>Displays the code for all controls - including the UserForm control.</p>

Form Menu continued

Item	Keyboard	BP Mode(s)	Comment
Run Script	n/a	<i>Test</i>	<p>Tests a script you've selected by using the View Code option, or by double-clicking on a control and scrolling to the applicable event.</p> <p>Important! Although you're probably running the script for a single control other than for the UserForm control, selecting this option places all controls in <i>Test</i> mode.</p> <p>De-selecting this toggle switch terminates the test.</p>
Pause Script	n/a	<i>Test</i>	<p>Halts a script you're testing.</p> <p>Clicking again resumes the test.</p> <p>Selecting this option does not return the form and its controls to <i>Design</i> mode.</p>
Stop Script	n/a	<i>Test</i>	Terminates the test of a script.
Bind Control	Ctrl + B	<i>Design</i>	Binds the current control to a control you designate.
Find Unbound	n/a	<i>Design</i>	Unbinds a bound control.
External Objects	n/a	<i>Design</i>	Accesses the Objects dialog, and a series of Microsoft and Datacap objects you can use to increase the power of your form, or expand its scope.
Hot Keys	n/a	<i>Design</i>	<p>Retrieves the Hot Keys dialog.</p> <p>You can use this dialog to define hot keys to assist with your scripting (Chapter 3).</p>

Layout Menu

These *Design* items help arrange controls within a form.

Item	Keyboard	BP Mode(s)	Comment
Snap to Grid	n/a	<i>Form Development and Task Project Setup</i>	Sets up a grid within the UserForm control, and snaps other controls to specific X and Y coordinates within the grid.
Bring to Front	n/a	<i>Form Development and Task Project Setup</i>	In the case of overlapping controls, brings the selected control to the forefront.
Send to Back	n/a	<i>Form Development and Task Project Setup</i>	In the case of two overlapping controls, places the selected control behind the other control.
Group	n/a	<i>Form Development and Task Project Setup</i>	Groups two or more controls so you can move them as a unit around the form. This option is a design convenience; it does <i>not</i> in any way unite or otherwise affect the properties, actions or events of the individual controls.
Ungroup	n/a	<i>Form Development and Task Project Setup</i>	Disconnects the controls which form a group.

Continued on the next page →

Layout Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Align	n/a	<i>Form Development and Task Project Setup</i>	<p>Options you can use to “align” two or more selected controls within the form.</p> <p>Important! The first control you select serves as the basis for positioning.</p> <p><i>Left</i> lines up the controls vertically, along their left edges.</p> <p><i>Right</i> lines up the controls vertically, along their right edges.</p> <p><i>Top</i> aligns the controls horizontally, along their top edges.</p> <p><i>Bottom</i> aligns the controls horizontally, along their bottom edges.</p> <p><i>To Grid</i> locks the controls into the User Form’s grid.</p>
Make Same Size	n/a	<i>Form Development and Task Project Setup</i>	<p>Re-sizes two or more selected controls.</p> <p>Important! The first control you select provides the standard size.</p> <p><i>Both</i> re-configures the height and width of selected controls to be sure they match the measurements of the standard control.</p> <p><i>Horizontal</i> re-configures the width of the selected controls to match the width of the standard control.</p> <p><i>Vertical</i> re-configures the height of the selected controls to match the height of the standard control.</p>

Layout Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Align Centers	n/a	<i>Form Development and Task Project Setup</i>	Aligns two or more selected controls according to their center points.
Tab Order		<i>Form Development and Task Project Setup</i>	Sets the order in which a keyboard's Tab key moves from one control to the next
Properties		<i>Form Development and Task Project Setup</i>	Opens and closes the Properties dialog of the control you select (Chapter 3).

Script Menu

Items in this menu assist in the formatting of a script.

They are available when you are developing a Datacap form (.dcf), or setting up a Task Project (.bpp) – *after* you select **View Code** from the **Form** menu.

Item	Keyboard	BP Mode(s)	Comment
Show Member	n/a	<i>Form Development and Task Project Setup</i>	Lists pre-defined “member” functions you can add to a script.
Show Tooltips	n/a	<i>Form Development and Task Project Setup</i>	A toggle switch that displays or hides tooltips for the member functions (above).
Toggle Breakpoint	n/a	<i>Form Development and Task Project Setup</i>	Inserts or removes a breakpoint at the script’s current location.
Indents	n/a	<i>Form Development and Task Project Setup</i>	<i>In</i> - indents subsequent lines of script <i>Out</i> - returns the script to its standard left-edge margin.
Comments	n/a	<i>Form Development and Task Project Setup</i>	<i>Comment</i> inserts a “ ’ ” to begin the text of a comment. <i>Uncomment</i> returns the text to script format.
Bookmarks	n/a	<i>Form Development and Task Project Setup</i>	These options are only available when <i>Batch Pilot</i> is in <i>Scripting</i> mode. <i>Toggle</i> adds a bookmark to the script, or removes it. <i>Clear</i> removes all bookmarks. <i>Go to Next</i> moves your cursor to the next bookmark. <i>Go to Previous</i> moves your cursor to the previous bookmark.

Script Menu (continued)

Item	Keyboard	BP Mode(s)	Comment
Update Script...	n/a	<i>Form Development and Task Project Setup</i>	After a proper warning, replaces existing scripts for all controls on the form, with new scripts.
Export	n/a	<i>Form Development and Task Project Setup</i>	Serves as a Save as... procedure for new form development.
Import	n/a	<i>Form Development</i>	Allows you to import code when you are setting up a <i>new</i> form.

Navigate Menu

Options in this menu help the operator of a Verify or FixUp task move from page to page or document to document within the batch, or from field to field within a page – even from batch to batch.

- ✓ **Important!** This menu only appears when a task is running.

Item	Keyboard	BP Mode(s)	Comment
Next Problem	Ctrl + N	<i>Task Operations</i>	Moves a task such as Verification to the next problem page in the batch.
Previous Problem	Ctrl + P	<i>Task Operations</i>	Moves the task to the previous problem page.
Next	Ctrl + Shift + N	<i>Task Operations</i>	Moves the task forward, to the next page in the batch.
Previous	Ctrl + Shift + P	<i>Task Operations</i>	Moves the task backward, to the previous page in the batch.

- ✓ You can find out more about Verify tasks in Chapter 10 of the *Guide to Taskmaster Rules*, and more about FixUp tasks in Chapter 11.

Help Menu

The **Help Topics** item accesses *Batch Pilot Help*.

Toolbars of the Batch Pilot Window

When you are developing a Datacap form (Chapter 3) or assembling the elements of a Task Project (Chapter 4), the **Toolbars** item of the *Batch Pilot Window's* **View** menu lists four toolbars: **Main, Form, Layout** and **Script**. However, the availability and make up of a toolbar may change, depending on the window's role at a particular moment.

When a *Batch Pilot* task is running, the window presents the icons of a single **Operations** toolbar. The makeup of this toolbar also changes, in response to the requirements of the task.

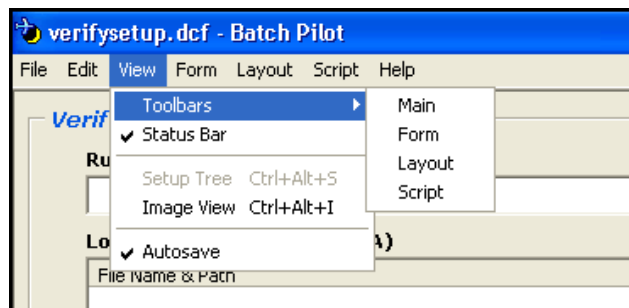
Similarly, if you are defining a new task or reviewing the Project Specifications of an existing task, the *Batch Pilot Window* features one Task Setup toolbar with just a few icons.

Finally, there are *Batch Pilot* products that don't use toolbars. Often, these are Datacap forms with User Interfaces that hide the *Batch Pilot Window* when they are active. (The *Rule Manager Window* is one example.)

The section below reviews the Form Development and Task Project toolbars of the *Batch Pilot Window*. The section on Page 33 describes the window's Task Setup toolbar; Page 33 explores toolbars of the window's *Operations* mode.

Form Development and Task Project Toolbars

When you use the *Batch Pilot Window* to develop and test a Datacap form (Chapter 3) – or set up a Task Project (Chapter 4) - the **Toolbars** option of the **View** menu has four items. Clicking on an item places the toolbar in the window and a check next to the title; clicking again removes the check and the toolbar.



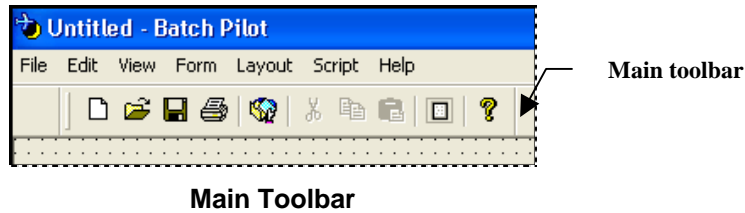
Toolbar options – Form Development

These are drag-and-drop toolbars: you can re-position a toolbar within a bar, or move it from the bar at the top to the bar at the bottom.

- ✓ Keep in mind the distinction between a Datacap form (.dcf), a Task Project (.bpp) that includes the form, and a task that uses the form as a *setup* or *runtime* dialog. Don't hesitate to learn more about these fundamental differences by experimenting freely with the forms, projects and Task Definitions of the *1040EZ* training application.

Main Toolbar

This toolbar helps you manage contributions of the *Batch Pilot Window* to Form Development and Task Project Setup:



From left to right, the icons include:

New Form. Places a blank Datacap form in the window's Data Area, along with the **Development Toolbox**. *Menu Equivalent: File/New Form. Keyboard: Ctrl + N.*

Open Form. Retrieves an existing Datacap form and displays it in the *Batch Pilot Window*, in *Design* mode. *Menu Equivalent: File/Open Form. Keyboard: Ctrl + O.*

Save Form. Saves changes to the Datacap form you're working with. *Menu Equivalent: File/Save Form. Keyboard: Ctrl + S.*

Print. Prints a Datacap form's scripts and logs, or a graphic representation of the Data Area's contents. *Menu Equivalent: File/Print. Keyboard: Ctrl + P.*

Open Project. Accesses the *Open Project* dialog so you can open an existing Task Project file (.bpp). *Menu Equivalent: File/Open Project. Keyboard: Ctrl + Alt + O.*

Cut. Deletes a setting or text you highlight – even a control! – and places it on the *Batch Pilot* clipboard. *Menu Equivalent: File/Cut. Keyboard: Ctrl + X.*

Copy. Copies a form's setting, text or control and places it on the *Batch Pilot* clipboard. *Menu Equivalent: File/Copy. Keyboard: Ctrl + C.*

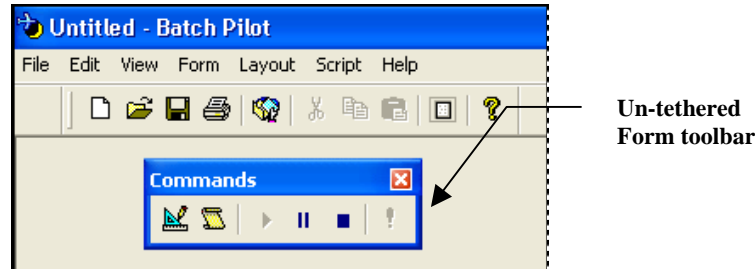
Paste. Pastes the contents of the *Batch Pilot* clipboard into the target element of the form you're working with. *Menu Equivalent: File/Paste. Keyboard: Ctrl + V.*

Image View. Opens and closes the window's **Image View** area. *Menu Equivalent: View/Image View. Keyboard: Ctrl + Alt + I.*

Help. Accesses *Batch Pilot* Help.

Form Toolbar

Icons of this toolbar move you in and out of Form Development's *Design*, *Script* and *Test* procedures:



From left to right, the icons include:

Design/Test. Toggles a Datacap form in and out of the form's *Design* and *Test* modes. **Important!** When this icon is depressed (*Design*), the **Controls Toolbox** is available. Furthermore, you can **only** use Form Development's **Layout** toolbar if you first depress this icon. *Menu Equivalent:* **Form/Design**.

Edit Script. Converts the *Batch Pilot Window* to its *Script* format; opens the form's complete script; and places your cursor in the opening [General] section. You can work within this section, or move to scripts for other controls. **Important!** When you use this icon, icons of the **Layout** toolbar are visible but not available. *Menu Equivalent:* **Form/View Code**.

Run Script. Tests a script you've previously selected. **Alert!** Clicking on this icon places the entire form in *Test* mode – even if you are testing the script for a single control. *Menu Equivalent:* **Form/Run Script**.

Pause Script. Interrupts the test of a script. Clicking on the icon again resumes the test. *Menu Equivalent:* **Form/Pause Script**.

Stop Script. Terminates a script's test. *Menu Equivalent:* **Form/Stop Script**.

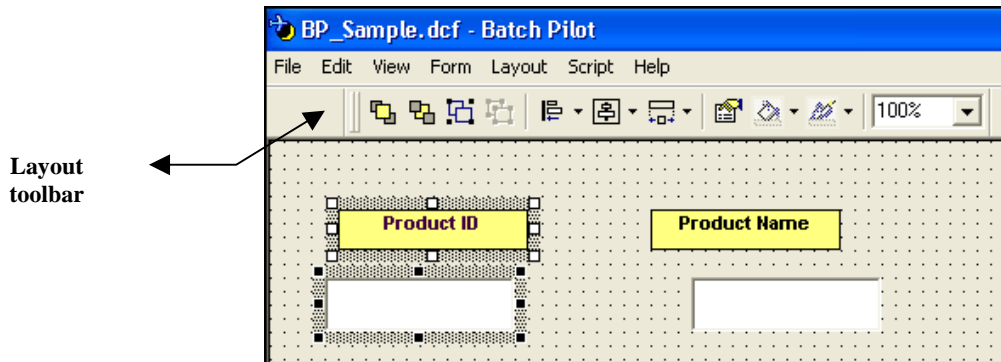
Test Form. Tests the overall form. This icon is only available if *Batch Pilot* is in *Design* mode.

Alert! This toolbar is not available if you are working with a new Task Project, but have not yet assigned forms to the project.

Layout Toolbar

These icons help you set up a form's structure; organize and align its controls; and specify a control's background and foreground colors.

- ✓ Because a new project opens with a standard "User Form", a limited set of icons in this toolbar is available for Task Project Setup.



Sample Datacap Form with controls

From left to right, the icons include:

Bring to Front. In the case of overlapping controls, brings the control you select to the template's forefront. *Menu Equivalent:* **Layout/Bring to Front.**

Send to Back. In the case of two overlapping controls, places the selected control behind the other control. *Menu Equivalent:* **Layout/Send to Back.**

Group. Groups two or more controls so you can move them around the form as a unit. *Menu Equivalent:* **Layout/Group.**

Ungroup. Disconnects the controls which comprise a group. *Menu Equivalent:* **Layout/Ungroup.**

Align Edges. Options you can use to align the edges of selected controls within the form. The icon's Spin button lists the options: *Lefts, Centers, Rights; Tops, Middles, Bottoms; to Grid.* **Two important considerations:** 1.) *Centers* aligns controls according to their horizontal center points. 2.) With the exception of the *to Grid* option, the first control you select serves as the basis for positioning. *Menu Equivalents:* **Layout/Align, Layout/Align Centers.**

Make Same Size. Re-sizes two or more selected controls. The icon's Spin button lists three options: *Width, Height, Both.* The first control you select provides the standard size. *Menu Equivalent:* **Layout/Make Same Size.**

Align Centers. Aligns the horizontal or vertical centers of controls you select. The icon's Spin button displays the two options; if you click on the icon without making a selection, *Batch Pilot* uses the horizontal center points to align the controls. *Menu Equivalent:* **Layout/Align Centers.**

Properties. Opens and closes the *Properties* dialog box for the control you select.
Menu Equivalent: **Layout/Properties.**

Background Color. Assigns a background color to the control you select. The Spin button opens the *Background Colors Palette*; you can use the palette to choose an existing color or mix a custom color. **Important!** If you click directly on the icon, *Batch Pilot* applies the color you have selected most recently from the palette.

Foreground Color. Assigns a color to a control's "foreground" element – the characters of a title or **Text** property, for example, or the graphics on an action control. The icon's Spin button opens the *Foreground Colors Palette*; you can use the palette to choose an existing color or mix a custom color. **Important!** If you click directly on the icon, *Batch Pilot* applies the color you have selected most recently from the palette.

Zoom. Alters the magnification of the Datacap form and *all* its controls within the *Batch Pilot Window* but does not change the window's magnification within your screen.

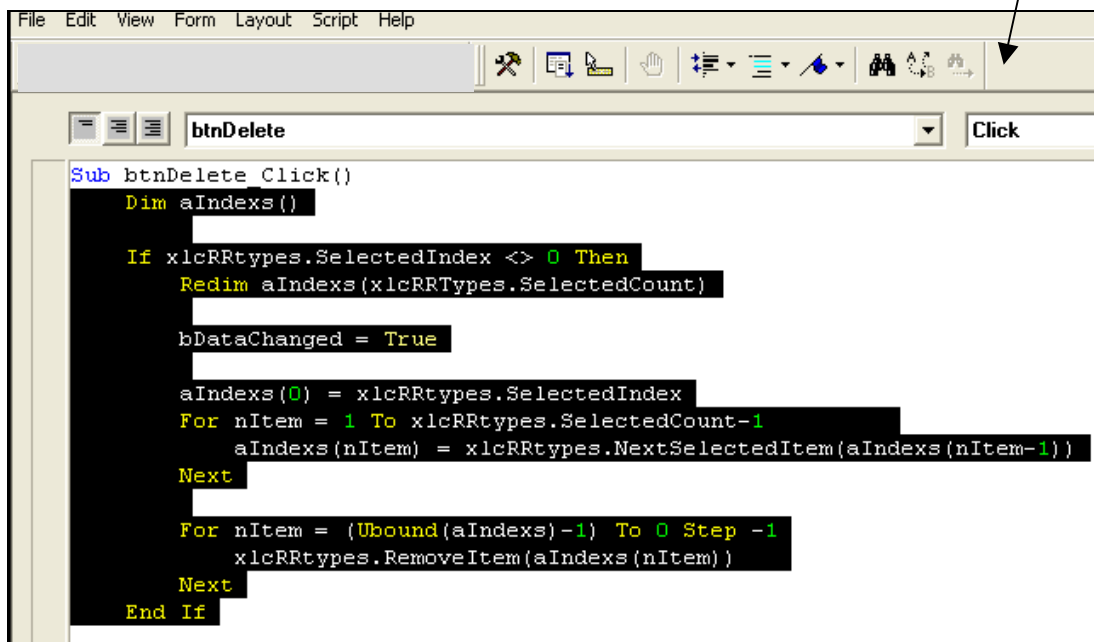
Script Toolbar

Icons in this toolbar assist with your scripting activities. **Alert!** Selecting **Script** from the **View** menu's **Toolbars** items adds the toolbar to the *Batch Pilot Window*. However, the icons are available only if the window is in *Script* mode. To work in this mode, you can:

- Double-click on a control; or
- Press the **Form** toolbar's **Design** icon (Page 28); or
- Select **View Code** from the **Form** menu.

✓ The full range of tools is available when you select a few lines of code.

Script toolbar



From left to right, icons of the **Script** toolbar include:

Options. Accesses the *Script Editor Options* dialog, and numerous settings involved in maximizing the layout and appearance of your script as an essential **Form Development** document.

Members. Lists standard functions that you can use to when scripting a control.
Menu Equivalent: Script/Show Member.

Tooltip Information. A toggle switch that displays or hides the value of a specific control's **Tooltip** property. *Menu Equivalent: Script/Show Tooltips.*

Toggle Breakpoints. A toggle switch that displays or hides breakpoints in the code.
Menu Equivalent:

Indents. A formatting device with two options. *Indent* decreases the left-side margin of highlighted lines of script, and any subsequent lines. *Outdent* returns highlighted

script (and subsequent lines) to the default left margin. *Menu Equivalent:* **Script/Indents.**

Comments. A programming device with two options. *Comment* inserts a “ ‘ “ to mark the beginning of one or more commented lines, and alters the font’s shade. *Uncomment* returns previously “commented” text to active code. *Menu Equivalent:* **Script/Comments.**

Bookmark. Manages the insertion and use of bookmarks within the script. The icon’s Spin button has four options. *Toggle* inserts or removes a unique bookmark in the script’s current location. *Go to Next* moves your cursor to the next bookmark. *Go to Previous* moves your cursor to the previous bookmark. *Clear* deletes all bookmarks. *Menu Equivalent:* **Script/Bookmark.**

Properties. Opens and closes the *Properties* dialog box for the control you select. *Menu Equivalent:* **Layout/Properties.**

Find. Opens the *Script* mode’s *Find* dialog. This very handy option locates words and phrases almost instantly.

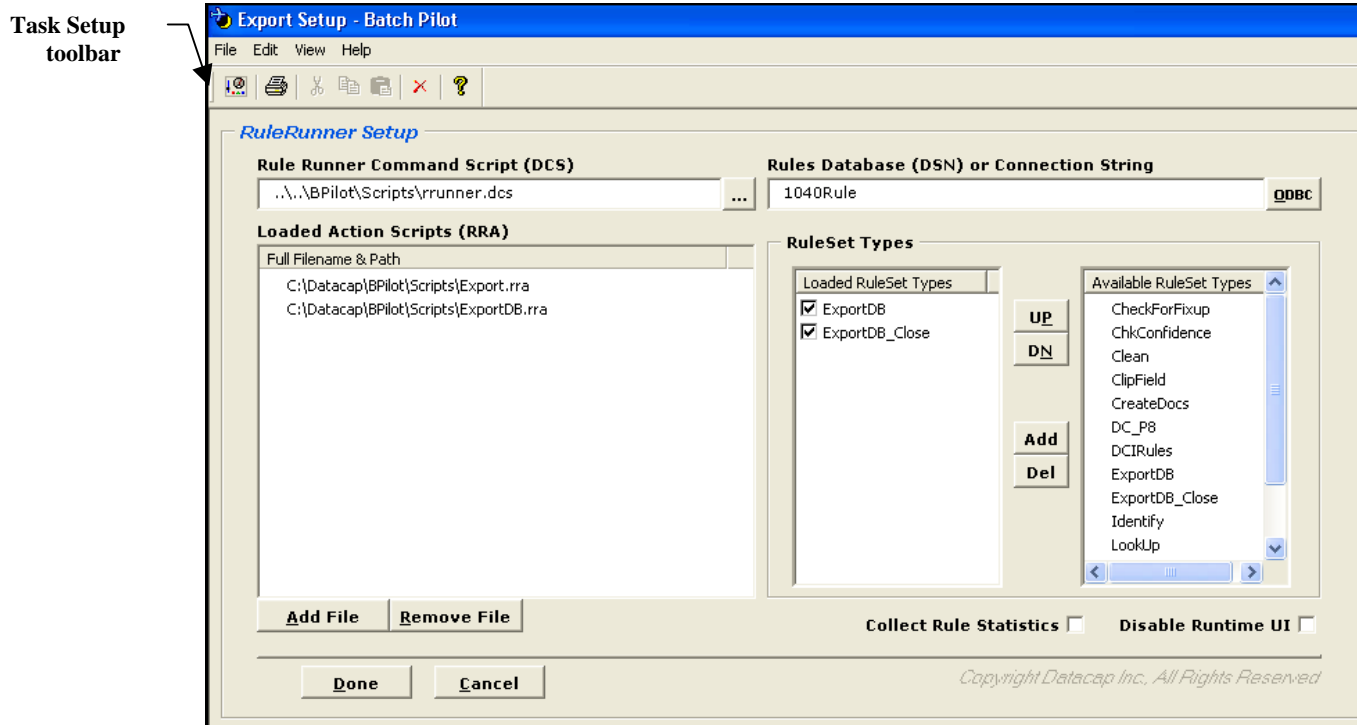
Replace. Opens the *Script* mode’s *Replace* dialog – a helpful editing tool that replaces words and phrases inside a section, or throughout your Datacap form’s file.

Repeat. Automatically repeats your most recent procedure involving an icon of the **Scripts** toolbar. For example, if the **Replace** icon helps you substitute one example of `Stats` with `Stats_New`, clicking on this icon finds the next example and repeats the step.

- ✓ Right-clicking in the *Scripting* dialog provides comparable and additional programming aids that are explained in Chapter 3.

Task Setup Toolbar

Taskmaster's Task Definition process links a task to its Task Project. The Task Project's *setup* form, in turn, provides the *Taskmaster* administrator who is defining the task with a *Task Setup* dialog. Here, for example, is the *1040EZ* Export task's *Setup* dialog as it appears in the *Batch Pilot Window* during the Task Definition process.



1040EZ Export Task Setup dialog

The window's **Task Setup** toolbar appears automatically when you are setting up a task, and has these icons (from left to right).

Task Settings. Accesses the *Task Settings* dialog. The tabs of this dialog have certain required specifications: for details, see Chapter 4 or *Batch Pilot Help*. *Menu Equivalent:* **File/Task Settings**.

Print. Prints a limited version of the current *Task Settings* dialog. *Menu Equivalent:* **File/Print**.

Cut. Deletes text values from certain fields and adds them to the *Batch Pilot* clipboard. *Menu Equivalent:* **Edit/Cut**.

Copy: Copies text values in certain fields and adds them to the *Batch Pilot* clipboard. *Menu Equivalent:* **Edit/Copy**.

Task Setup Toolbar

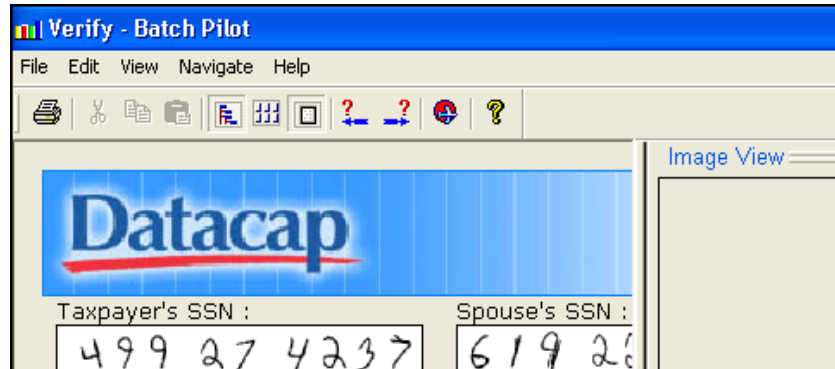
Paste. Copies text values in the *Batch Pilot* clipboard into a data entry field of the dialog. *Menu Equivalent:* **Edit/Paste.**

Quit Setup. After a proper warning, closes the *Batch Pilot Window* and terminates the Task Setup process. *Menu Equivalent:* **File/Quit.**

Help. Accesses *Batch Pilot Help*. *Menu Equivalent:* **Help/ Help Topics.**

Operations Toolbar

During Task Operations, the *Batch Pilot Window* toolbar has these icons:



Verify Task Operations

- ✓ The illustration shows the *runtime* dialog of a task that requires significant operator participation – in this case, a Verify task. FixUp tasks are also operator-intensive.

Most tasks, however, operate in the processing background: although the *Batch Pilot Window* and the **Operations** toolbar are briefly visible, the operator usually does not have access to either.

From left to right, the icons include:

Print: accesses the driver that links you to your printer.

Cut: cuts selected text and adds it to your clipboard.

Copy: copies selected text and adds it to the clipboard.

Paste: pastes the clipboard's text to a text field of an *Operations* dialog or panel.

Batch Tree: a toggle switch that displays or hides the content of the current batch.

Thumbnails: a toggle switch to display or hide **Image Thumbnails** for the batch.

Image View: a toggle switch to display or hide the window's **Images** area.

Previous Problem: moves a task's attention to the previous "problem" field or page. This icon is only available when a Verification or FixUp task is running.

Next Problem: moves a task's attention to the next "problem" field or page. This icon is only available when a Verification or FixUp task is running.

Quit Task: terminates the task's operations after a proper warning, closes the *Batch Pilot Window* and returns you to *Taskmaster*.

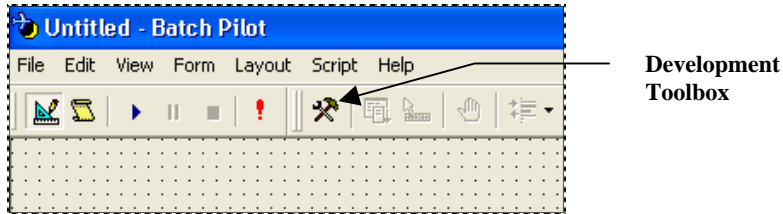
Help: accesses *Batch Pilot* Help.

Scripting Aids of the Batch Pilot Window

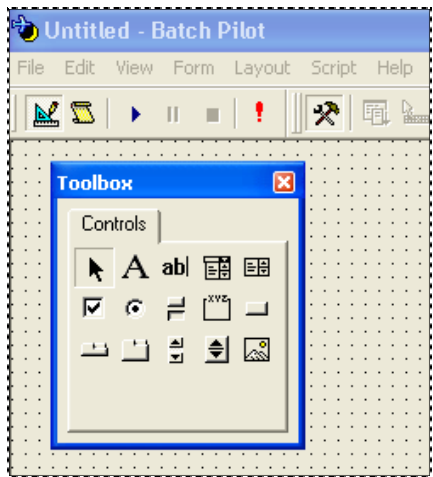
The sequence below creates a new Datacap **form** (.dcf) with just four **controls**: a label, a text field, a button, and the UserForm itself.

Step	Action
------	--------

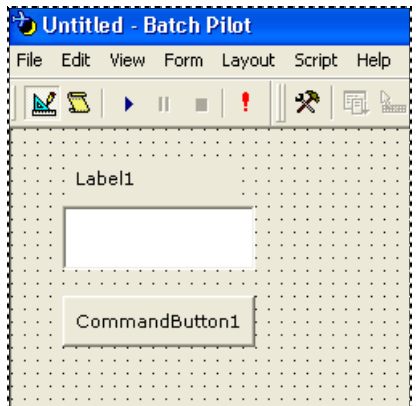
1. Select **New Form** from the *Batch Pilot Window*'s **File** menu: an untitled Datacap form will appear in the window's Data Area.



2. Click on the **Toolbox** icon.

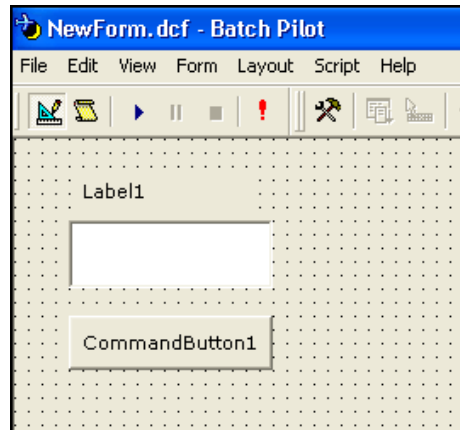


3. Use the drag-and-drop tools in the *Toolbox* to place three controls on the new form.



Scripting Aids of the Batch Pilot Window (continued)

Step	Action
4.	Save the form in a convenient location.



NewForm.dcf

- ✓ Even this very simple form provides a chance to explore and evaluate the following *Batch Pilot Window* scripting aids:

Control Properties. When the window is in *Design* mode, you can access the control's *Properties* dialog if you:

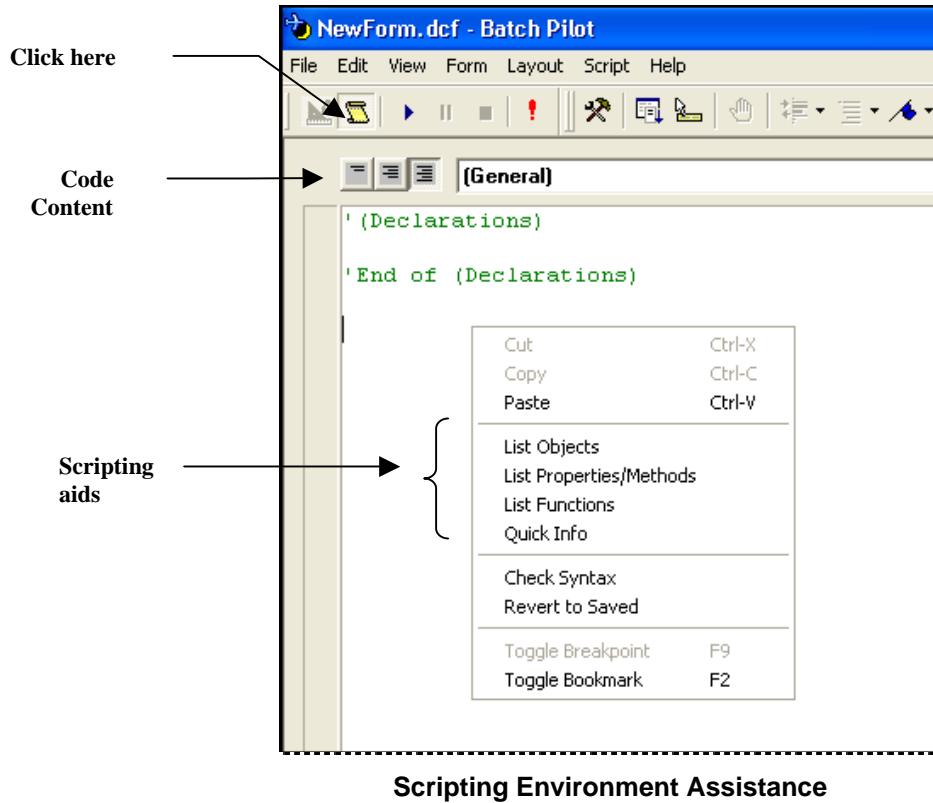
- ◆ Right-click on the control and select **Properties** from the options; *or*
- ◆ Select the **Properties** item of the **Layout** menu; *or*
- ◆ Click on the **Properties Window** icon of the **Layout** toolbar.

Form scripts - special tools. When a form is in *Scripting* mode (illustrated on the next page), right-clicking in the window's Data Area produces a list of scripting aids. The second section has four special items:

- ◆ **List Objects** identifies all controls in the form; the **FormDriver** object; Datacap's **Pilot**, **ImageCtrl**, and **DCO** objects. The list also identifies those objects of the Windows Script Host that you have used in the script. **Alert!** Clicking once on an object inserts it into the script.
- ◆ **List Properties/Methods** is a comprehensive lists the properties and methods that are part of the form's script.
- ◆ **List Functions** lists VBScript's built-in and scripting runtime objects.
- ◆ **Quick Info** describes the attributes of a nearby object or function.

The window's **Code Content** icons list code for (from left): a single event of the current object; all of the object's events; all code for the form.

Operations Toolbar



Alert! Copying a control's script or a portion of the script and pasting it into the script of another control requires special steps. These steps are outlined in Chapter 3 (*Forms*).