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Welcome

Welcome to *Taskmaster*– and to the *Taskmaster Administrator's Guide.*

We have prepared this text exclusively for individuals responsible for installing a **Datacap Taskmaster** system – and for setting up and managing *Taskmaster* applications.

The *Administrator's Guide* begins with an introduction to *Taskmaster's* core concepts, and to the terminology which appears throughout the book. The text then examines installation, set up and day-to-day tools and procedures - all from the Administrator's perspective.

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

The chapter's topics include:

Taskmaster documentation includes these supporting texts:

The *Taskmaster Windows & Dialogs Reference* examines the fields and settings of each of *Taskmaster's* windows and dialogs, the content of its menus, and the role of each toolbar icon.

The *Guide to Datacap Studio* carefully explores the three pages of this essential *Taskmaster Rulerunner Service* workshop…the **Rulemanager Page**, the **Zones Page** and the **Test Page**. This guide describes the set up of an application's Document Hiearchy, fingerprints and Ruleset/Rule combinations.
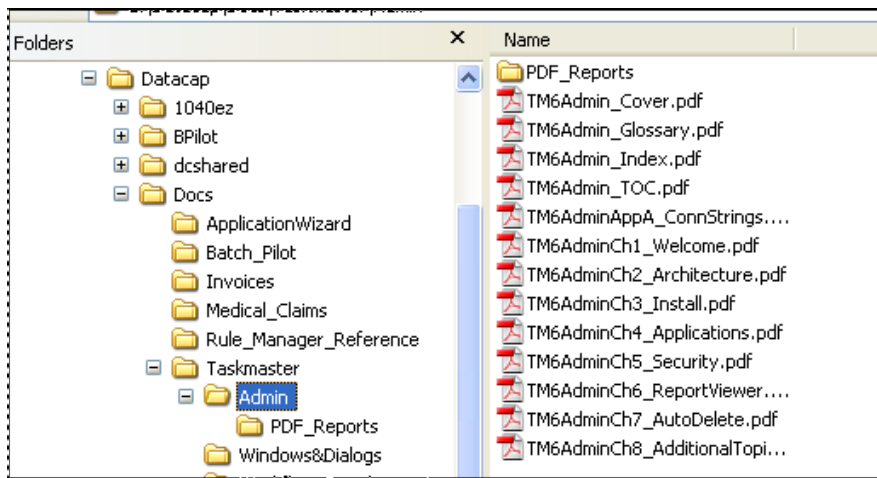
The *Guide to Taskmaster Rules* describes the structure and components of an application's Document Hierarchy, Workflow Hierarchy and Ruleset Hierarchy in terms of tasks in specific categories: scan, rulerunner, verify and fixup.

The *Rule Manager Reference* identifies and explains the many facets of a *Taskmaster* application's *Rulemanager* and its **Rulemanager Window**, and describes each of the standard *Rulemanager* actions.

The *Datacap Application Wizard Guide* shows you how to use this easily accessible wizard to set up a new application; copy and existing application; or convert a *Taskmaster Rulerunner* application to a *Taskmaster Rulerunner Service* application.

The *Guide to Taskmaster Web* is an up-to-date review of all aspects of the Taskmaster Web environment that examines pages, applications, security and applications.

✓ You will find PDF versions all Datacap documentation in the **Docs** folder of your **Datacap** directory. For example:

In addition, *Taskmaster* Help is just a click away, ready with instant explanations of every feature and procedure.

☞ *Very important!* This edition of the *Taskmaster Administrator's Guide* concentrates on features of a *Taskmaster Rulerunner Service* configuration. The principal differences between *Taskmaster Rulerunner* and *Taskmaster Rulerunner Service* involve *Taskmaster Rulerunner Service's* use of:

♦ Datacap Studio instead of Rulemanager to set up a Document Hierarchy, fingerprints and rules

♦ Rules files instead of a Rules database

♦ a Rulerunner Service (or Rulerunner Web Service) instead of Rulemanager to apply rules

♦ Task Profiles instead of Task Definitions to assign Rulesets to rulerunner rules.

♦ Optional additional restrictions on the scope of a user's administrative privileges

♦ Windows Authentication procedures that place users in Windows Authentication Groups – and assign Administrative privileges and Job-Task Permissions to a group rather than to its individual members.

Introducing the Datacap Taskmaster 7 CD-ROM

Datacap Taskmaster software is on a CD-ROM: you can install the software and set up a *Taskmaster* configuration without difficulty to meet your needs for data capture that is efficient, reliable and cost-effective.

Taskmaster Applications	Datacap Taskmaster	Taskmaster Utilities
1040EZ	**Taskmaster Client**	Application Wizard
Express	**Taskmaster Web Client**	Report Viewer
Invoice	**Datacap Studio**	AutoDelete
MClaims		
Survey	**Taskmaster Server Service**	
Rules Files	**Taskmaster Web Service**	
1040EZ	**Rulerunner Service**	
AppWizard	Rulerunner Web Service	
Survey	**Batch Pilot**	
Actions Libraries	**Documentation**	

The table on the next page introduces you to each of the Datacap Taskmaster components, and identifies supporting documentation.

Please note: the chart and the table only highlight major components on the **Datacap Taskmaster** CD-ROM.

✓ Documentation is available as printed texts and, electronically, as PDF files. The Datacap Taskmaster Documentation Installation process places the PDF files in the **Doc** folder of your **Datacap** directory. The *Guide to Datacap Documentation* is a PDF file with links to all **Datacap** documents.

Components of the Datacap Taskmaster CD-ROM

Component	Description
CD-ROM	The Installation disk with standard and optional *Taskmaster* components. The disk's InstallShield Wizard automatically copies all files to a Server you designate. *Alert!* Most optional components require separate **Datacap** licenses.
Taskmaster Client	Software that defines, runs and manages an application and its batch processing activity. The Installation process sets up a central Taskmaster Server Service and an Administrative Taskmaster Client. **Documentation:** *Taskmaster Administrator's Guide; Windows & Dialogs Reference.*
Taskmaster Web Client	Software that sets up and runs an application in Datacap's *Taskmaster Web* environment. **Documentation:** *Guide to Taskmaster Web*
Datacap Studio	The workshop used by a *Taskmaster 7* application to prepare its Document Hierarchy, fingerprints, **Ruleset**s, rules, and fingerprints, and Task Profiles – and to test the application at each stage of its development. **Documentation:** *Guide to Datacap Studio*
Taskmaster Server Service	The service that connects Taskmaster Clients to the configuration's File Server and to an application's databases.
Taskmaster Web Service	The service that manages *Taskmaster Web* procedures and operations, and communications with Taskmaster. **Documentation**: *Guide to Taskmaster Web.*
Rulerunner Service	The service that establishes relationships between Ruleset/Rules combinations and Task Profiles, and processes a task's rules in response to details of the rules' actions. The Rulerunner service can run locally on the Internet (the Rulerunner Web Service.)

Components of the Taskmaster CD-ROM (continued)

Component	Description
Batch Pilot	A second *Taskmaster* development workshop. *Batch Pilot* assembles Task Projects and their **setup** and **runtime** forms they use, as well as **Data Entry** panels for Verification tasks. **Documentation:** *Guide to Batch Pilot, Guide to Taskmaster Rules.*
Taskmaster Utilities	*These are the principal utilities (the list is not comprehensive*
Application Wizard	A wizard you can use to set up a completely new Taskmaster 7 application without delay, copy an existing application; or covert a *Taskmaster 6* application to Taskmaster 7. **Documentation: Guide to the Taskmaster Application Wizard.**
AutoDelete	An application-specific *Taskmaster* utility that deletes batches according to selection and scheduling guidelines you establish. **Documentation:** Chapter 7, *Taskmaster Administrator's Guide*
Report Viewer	An application-specific *Taskmaster* utility that generates Detail and Summary Reports covering the performance of individual tasks. *Report Viewer* creates and formats its reports in response to parameters you set. **Documentation:** Chapter 6, *Taskmaster Administrator's Guide*
Pre-configured Applications	The **Datacap Taskmaster** CD-ROM includes the following pre-defined data capture applications.
1040EZ	A training application set up to processes IRS tax forms. **Documentation**: Documentation covering almost all aspects of your **Datacap Taskmaster** configuration relies on examples drawn from the *1040EZ* application…an application that is easy to access and indestructible.

Components of the Datacap Taskmaster CD-ROM (continued)

Component	Description
Pre-configured applications, (continued)	
AppWizard	The template used by the Taskmaster Application Wizard to construct a new *Taskmaster 7* application. *Important!* Unlike the other applications, the **AppWizard** folder is not a child of the **Datacap** directory: instead, it belongs to the **RRS** (Rulerunner Service) folder's **Libs** sub-folder. **Documentation:** *Guide to the Taskmaster Application Wizard.*
Survey	An application that processes forms featuring a series of Optical Mark Recognition (OMR) fields. **Documentation**: *The Guide to Taskmaster Rules*
Rules Files	Rules files (.rul) for the pre-configured *1040EZ* and *Survey* applications. - and for the *AppWizard* new application template. These files are in the **Libs** sub-folder of the **Datacap** directory's **RRS** (Rulerunner Service) folder. **Note:** there aren't any Rules files for the other applications because they use a Rules database instead of Rules files. **Documentation:** *Guide to Datacap Studio: Chapter 6*

Component	Description
Actions Libraries	Actions files (.rrx) with actions in a particular category. Actions files are in the **RRX** sub-folder of the **Datacap** directory's **RRS** folder. **Documentation:** *Guide to Datacap Studio: Chapter 6*
Documentation	PDF files for all Datacap documention. These manuals are in the **Datacap** directory's **Docs** folder, and include the Guide to Datacap Documentation, and a *Summary Index of Documentation Topics.*

Typographic and Terminology Conventions

This book uses the following typographic and terminology conventions.

Convention:	Example:
Menu names are in **Bold** type.	From the **View** menu…
Menu commands are in **Bold** type.	From the **View** menu, select the **Operations** command.
Dialog names are in ***BoldItalic*** type.	The ***Please Login*** dialog requires Security codes.
The names of a dialog's tabs are in *italics.*	Be sure to complete the *General* tab of the ***Task Settings*** dialog.
Window names are in ***BoldItalic*** type.	The ***Taskmaster Window*** is the command post of workflow operations.
Field names are in **Bold** type.	The **Task ID** field identifies a task that's part of an application's workflow.

Typographic and Terminology Conventions (continued)

Convention:	Example:
Button names are in Regular type.	Click on the OK button.
Drop-down list items are in *Italic* type.	The *Rulerunner* module is an option in the **Task Module** drop-down list.
The names of Ruleset are in **Bold** type.	**Validate** rules confirm both *alphanumeric* and *numeric* values.
The names of actions are in **Bold** type.	This **Validate** rule uses an **Is_Numeric** action.
Datacap Taskmaster products, utilities and application names are in *Italic* type.	*Taskmaster* is a product, *Rule Manager* is a utility, *1040EZ* is an application.

If You Need Help

Here is the number for Datacap's technical support:

☎ **914-259-1300**

If you need to **fax** Datacap technical support, the fax number is:

☎ **914-366-0500**

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

✉ **support@datacap.com**

To reach Datacap Support on the Web, go to:

http://support.datacap.com

About this Book

The *Taskmaster Administrator's Guide* contains the following chapters.

Chapter 1: Welcome

Chapter 1 introduces you to a **Datacap Taskmaster** configuration, to the components of the **Datacap Taskmaster** CD-ROM, and to this text.

Chapter 2: Taskmaster Architecture

This chapter briefly describes the structure of **Datacap Taskmaster** and Taskmaster Rulerunner Service application that uses Datacap Studio as a development workshop – and uses Rulerunner Service to process rulerunner tasks such as Recognition.

Chapter 3: Installation

Chapter 3 refers you to the Taskmaster 7.5 Installation and Configuration Guide for complete information on installation prerequisites, and detailed installation and configuration instructions for workstations and servers.

Chapter 4: Taskmaster Applications

This chapter describes the features of a sample Taskmaster Rulerunner Service application, including its: Datacap Studio; Document Hierarchy, Rulesets and rules; fingerprints and zones…and Task Profiles. Chapter 4 also describes the application's *Taskmaster Administrator*, and relationships between *Taskmaster* and Datacap Studio.

Chapter 5: Security

Application Security is an ongoing administrative concern and responsibility. This chapter explores procedures for defining, limiting and monitoring user and workstation access to an application's data and operations.

Chapter 6: Report Viewer

Report Viewer is the standalone utility you'll use to generate electronic and printed reports with details and summaries of workflow activity. According to guidelines you provide, *Report Viewer* produces both standard and custom reports, on an *ad hoc* or *scheduled* basis. Chapter 6 shows you how to link *Report Viewer* directly to your application, and how to define and generate reports.

Chapter 7: AutoDelete

AutoDelete is a *Taskmaster* tool you can use to delete selected batches and the files they contain from an application's **Batches** directory. Chapter 7 examines the setup and operation of the *AutoDelete* utility.

Chapter 8: Additional Topics

Chapter 8 explains the use of auxiliary procedures to review and perhaps select an alternative Batch ID structure.

Appendix A: Connection String Syntax

This appendix lists the syntax of database connection strings for **Datacap Taskmaster** configurations using OLE MS-Access, ODBC MS-Access, OLE SQL SERVER (Windows Authentication), ODBC SQL SERVER (Windows Authentication), OLE SQL Server (SQL Server Authentication), ODBC SQL SERVER (SQL Server Authentication), or ODBC Oracle.

Glossary

The Glossary provides definitions of *Taskmaster* terms.

Index

The Index is an alphabetical listing of topics and sub-topics covered by the *Taskmaster Administrator's Guide.*