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 covers the following topics as it examines the setup and operation of the *AutoDelete* utility:

Be Careful! *AutoDelete* is an *irreversible* file management process. Access to its functions should be limited to authorized individuals who have worked with the procedures in this chapter. If you have *any questions or concerns* about the installation or use of *AutoDelete*, please contact a Datacap Support Specialist or Implementation Engineer.

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Introduction

AutoDelete is a valuable cleaning tool.

Over time, as jobs and tasks process documents and pages, an application's **Batches** directory expands to accommodate new batches containing Image files, Data files, Page files - even Log files. In addition, batches may store "acknowledgement" files (.ack) generated when *Taskmaster* exports or uploads data to an external database.

For most applications, a batch loses much of its value soon after the Export task extracts verified data from its pages, and places the data safely in an Export file or database well removed from the batch itself. Other applications go a step further, "uploading" and storing the original Image files…again, in a safe and removed location.

Occasionally, *Taskmaster* processes invalid batches—perhaps batches containing files polluted by uninvited, unwanted data. These, too, deserve a close look and possible elimination.

Under your direction, the *AutoDelete* utility takes steps to:

- Search for batches associated with specific jobs and tasks.
- Identify those batches that meet your selection criteria.
- Delete some or all of these batches from the application's **Batches** directory.
- Update tables of the application's Engine database with the results of the deletion.
- Generate an AutoDelete Log file documenting the results of the process.
- Retain evidence of the deleted batch, according to guidelines you provide.

The structure of *AutoDelete* - and its role - are portrayed by the chart on the next page.

As the chart indicates, *AutoDelete* is a standalone operation, with code that is accessible to an ***authorized*** Taskmaster Client. As a result, the setup of *AutoDelete* takes place at the client level…client by client if you are using more than one. (Details of *AutoDelete* installation are on Page 4.)

✓ **We *strongly recommend* that you limit the installation of *AutoDelete* to a single Administrative client. We also recommend that you first work with *AutoDelete* in a Test Environment using the *1040EZ* application to generate and delete sample batches.**

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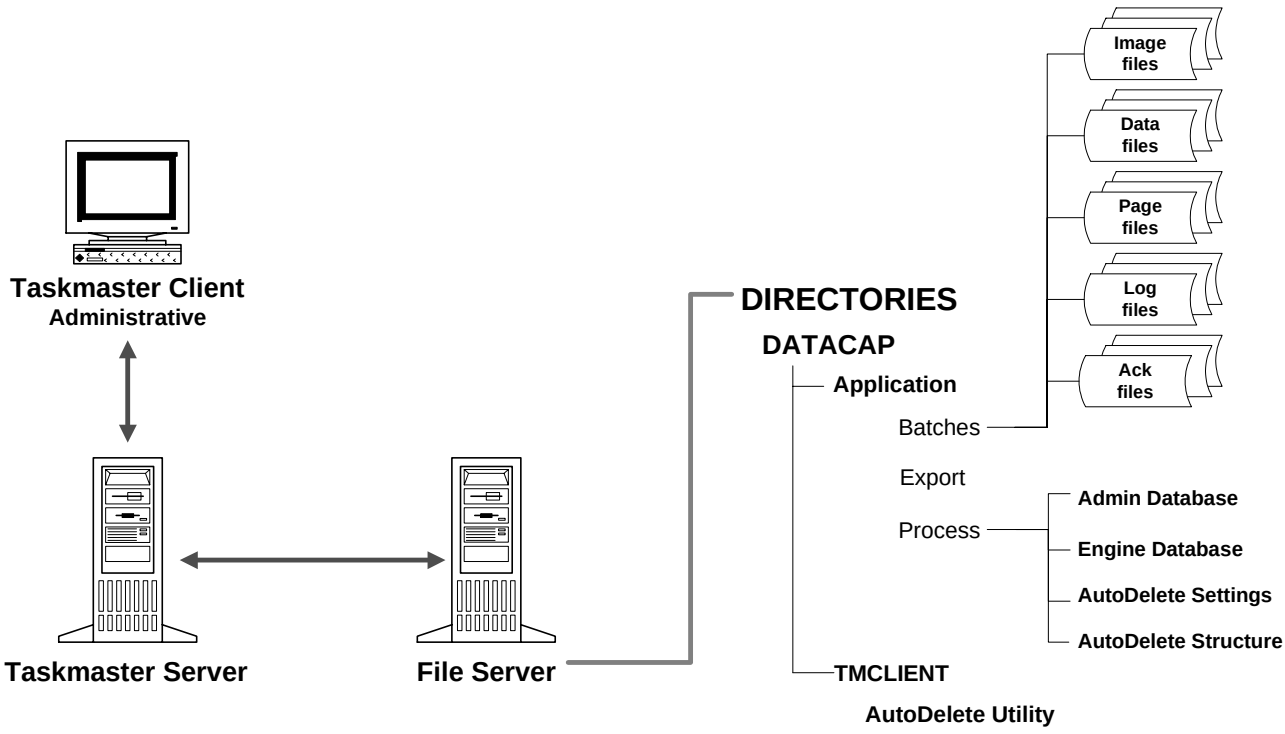

Ad hoc vs Scheduled Modes

After setup is complete, *AutoDelete* focuses exclusively on searching for and displaying information about an application's processed batches, then deleting batches according to parameters you supply. *AutoDelete* takes these steps either on an ***ad hoc*** basis in response to your instructions or on a ***scheduled*** basis, in response to timing criteria you provide. A complete explanation of these procedures begins on Page 8.

In either mode—*ad hoc* or *scheduled*—*AutoDelete* removes batches according to your deletion criteria. These criteria can be simple, specifying only the application and its databases…or more complex, working with Log and Acknowledgement files, and the use of backup databases. An *AutoDelete* structure can be reviewed and modified by any ***authorized*** user; changes to the structure can be temporary or permanent.

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Installation and Setup

The **Datacap Taskmaster** Client Installation process automatically provides ***each*** Taskmaster Client with two *AutoDelete* files: **tmbatdel.ini** and **tmbatdel.exe**. Installation places the files in the **tmclient** folder of your **Datacap** directory.

tmbatdel.ini is a Settings file which identifies the Statistics table for certain task categories in the Engine database. When carrying out its work, *AutoDelete* removes not only a batch and its files but corresponding rows in applicable Statistics tables as well. Be sure to place a copy of the Settings file (**tmbatdel.ini)** in your application's **Process** directory. (*Taskmaster's Application Wizard* automatically adds a copy to a new application's **Process** directory. For a full explanation of the wizard, see the separate *Application Wizard Guide*.)

This file also contains the previously-defined User ID and Password, and Station ID, that are ***required*** for access to *AutoDelete* and its procedures. When setting up Application Security (Chapter 5), give serious consideration to the need for a distinct User Definition and Station Definition just for this activity, and their security codes to this file.

tmbatdel.exe is the utility's executable file and remains in the **Datacap** directory's **tmclient** folder. When setting up *AutoDelete*, you'll create a Desktop shortcut to **tmbatdel.exe** in this location (below.)

To Setup AutoDelete

Take the steps below to setup your application's *AutoDelete* utility on the application's Administrative Taskmaster Client.

Remember! The installation of Taskmaster Client software on any workstation automatically includes the two *AutoDelete* files in the client's **Datacap/tmclient** folder. We ***strongly recommend*** that you delete these files from the folders of most other clients as an extra Security safeguard.

Step	Action
1.	Use your Windows Explorer to open the **tmclient** folder of the **Datacap** directory.
2.	Copy the **tmbatdel.ini** file; paste it into your application's **Process** directory. (This step is not necessary if you use the *Application Wizard* to setup a new *Taskmaster* application. However, this step is ***required*** if the wizard has copied an existing application that does not include *AutoDelete* capabilities.)
3.	Right-click on the Desktop of the computer that is host to your administrative Taskmaster Client.
4.	Select **Shortcut** from the **New** options.

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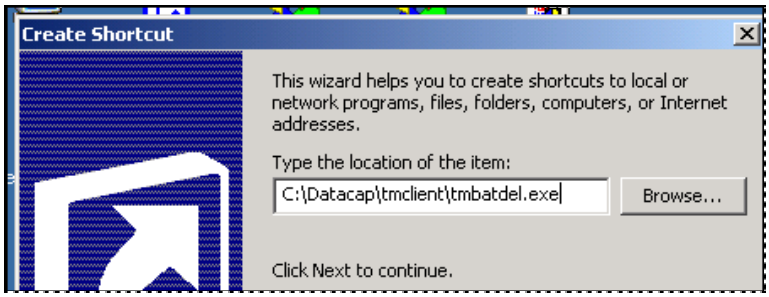
To Setup AutoDelete (continued)

Step	Action

5. When the ***Create Shortcut*** wizard appears, use the Browse button to locate and select the **tmbatdel.exe** file in your **Datacap** directory's **tmclient** folder.

6. Confirm that that the ***Create Shortcut*** wizard's **Command Line** picks up the file's name and path:

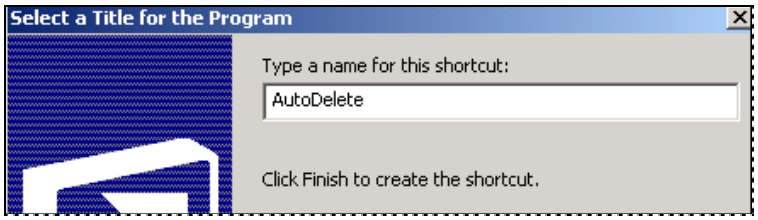


7. Expand the **Command Line** to include the Data Source Names of the application's Admin and Engine databases, and the name and path of the *AutoDelete* Settings file (**tmbatdel.ini**). ***Be very careful*** with the syntax. Here's an example (using *1040EZ* parameters):

```
C:\Datacap\tmclient\tmbatdel.exe –ad"PROVIDER=MSACCESS;
DSN=C:\Datacap\1040EZ\process\1040Adm.mdb;CATALOG=;DBNTA=;"
-ed"PROVIDER=MSACCESS; DSN=C:\Datacap\1040EZ\process\
1040Eng.mdb;CATALOG=;DBNTA=;" –iC:\Datacap\1040ez\process\
tmbatdel.ini
```

(Appendix A lists the precise syntax for all Connection Strings.)

8. Press the Wizard's Next button and give the shortcut a name:



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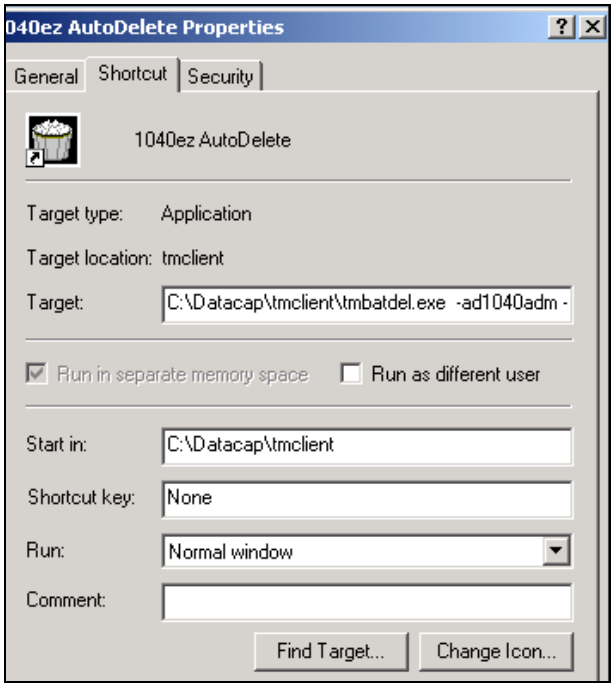
To Setup AutoDelete (continued)

Step	Action

9. Click on the Finish button to add the shortcut to your desktop.

10. Right-click on the new icon: select **Properties** from the list of options.



11. Confirm the settings in *Shortcut* tab, then close the ***Properties*** dialog.

12. Be sure your Taskmaster Server Service is up and running.

13. Double-click on the new **AutoDelete** shortcut to access your *AutoDelete* utility – and an empty ***AutoDelete Manager***.

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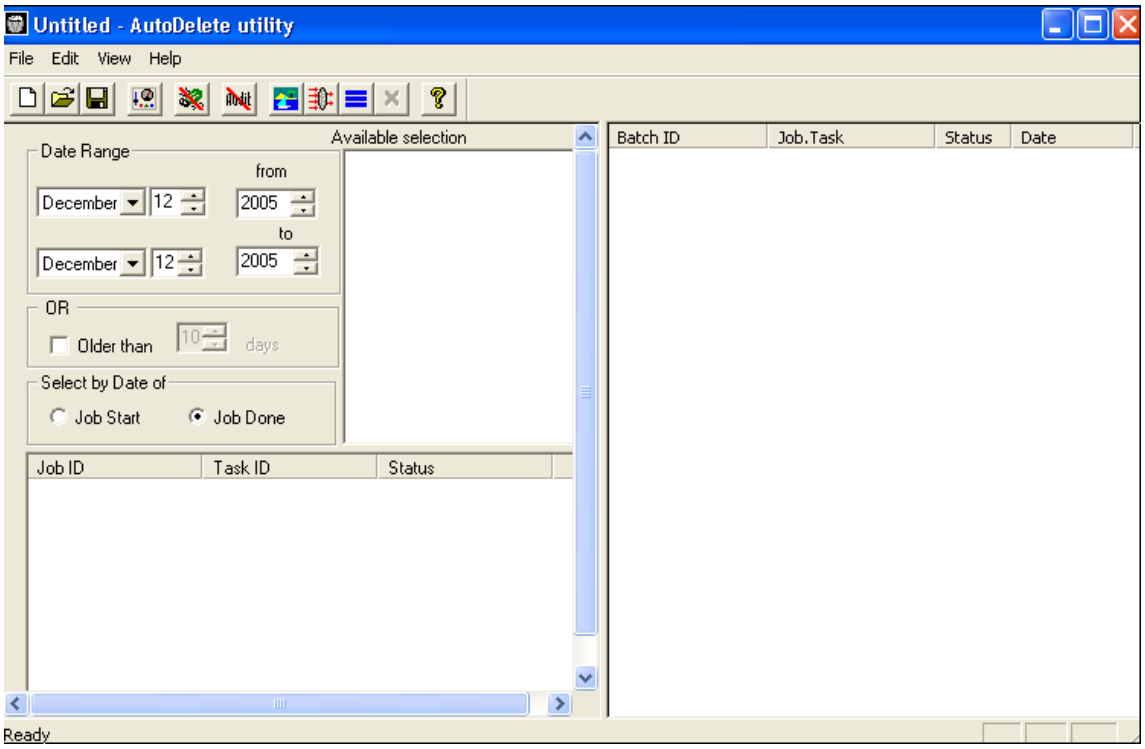

AutoDelete Manager

✓ *Taskmaster* Installation automatically supplies the *1040EZ* training application with *AutoDelete* capabilities. To initiate the utility, select **Datacap Taskmaster** from the **Programs** listings of your Windows Start button, **1040EZ** from the **Applications**, and **AutoDelete.** ***Remember!*** Be sure your Taskmaster Server Service is running.

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AutoDelete Configurations

Every *AutoDelete* "configuration" has two components:

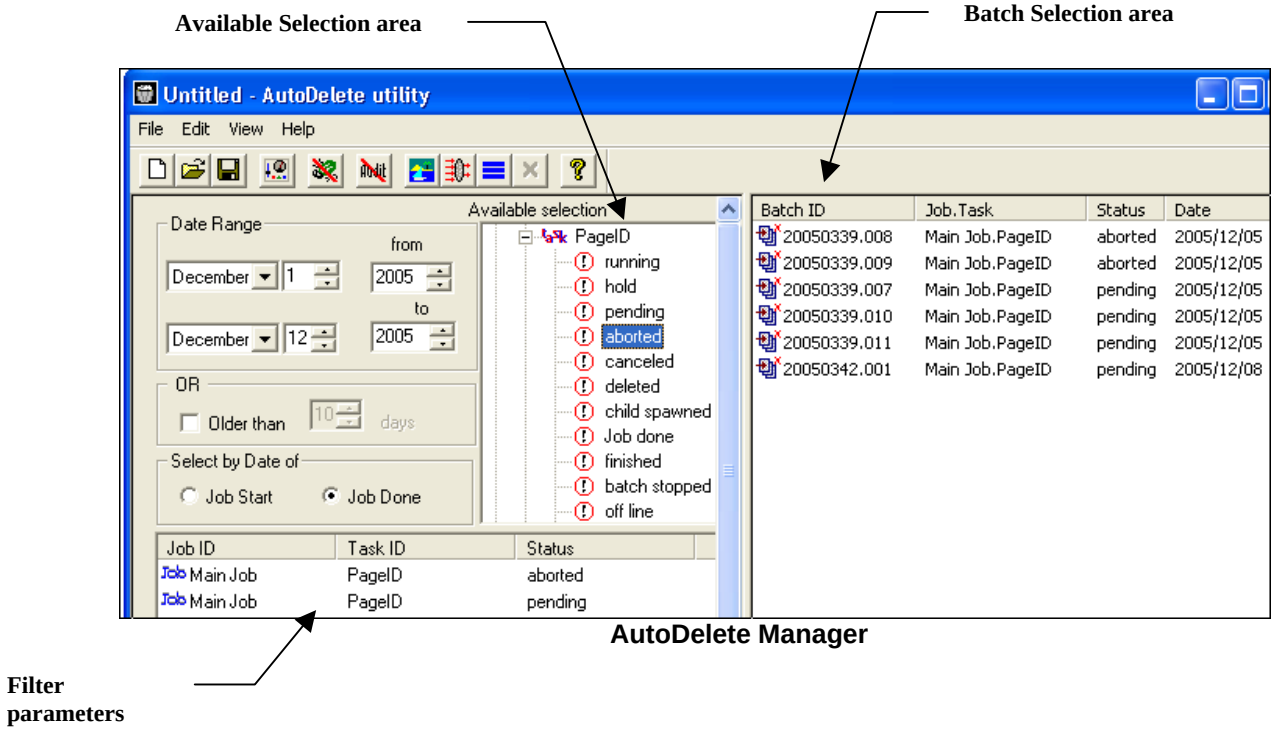
- Fields of the ***AutoDelete Manager*** specify the files to be removed.
- Settings in the three tabs of the ***Options*** dialog determine the ways in which deletion is carried out (Page 16).

A configuration can be temporary, assembled just for the moment, to remove certain batches. Typically, you'll save a configuration as a Batch Delete file (**.bdl)** and recall it for repeated use.

If you do create a Batch Delete file, you can add its name and path to the **Target** property of the *AutoDelete* desktop shortcut you setup (Page 4). For an example of this property's complete value, see Page 37.

In addition, you can activate a configuration *manually*, using it when circumstances require your intervention (Page 27). Or you can setup the configuration to operate *automatically*, removing files according to a schedule you define but without your direct participation (Page 32).

Before exploring the steps you'll take to define and process an *AutoDelete* configuration, spend a few moments investigating the features and functions of the ***AutoDelete Manager*** and the tabs of the ***Options*** dialog (Page 16).



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The AutoDelete Manager

When you access *AutoDelete*, the ***AutoDelete Manager*** automatically appears on your screen—without specifications.

AutoDelete is now "pointed" towards your application…towards its jobs and their tasks, towards the batches processed by each task, and towards the files tied to each batch. As a result, as you begin working with the ***AutoDelete Manager***, the information that appears in its fields reflects the Job/Task/Batch activity of that application.

In the illustration on the previous page, the ***AutoDelete Manager*** lists certain batches of the *1040EZ* application's Main **job**. The job's Export **task** encountered trouble with certain batches and assigned these batches an *Abort* **status**.

The Administrator must decide whether to delete these batches and, if so, how to use the ***AutoDelete Manager*** to help with the task.

The following pages examine the components of the ***AutoDelete Manager***.

✓ For a complete explanation of the steps you'll take to use the ***AutoDelete Manager***, see Page 24.

Menus of the AutoDelete Manager

The ***AutoDelete Manager*** employs menus with limited scope. The table below describes the items in these menus. If a title is followed by a *****, a toolbar icon (Page 12) duplicates the item's function.

Menu/Item	Hot Keys	Description
File		
New*	Ctrl-N	Opens an empty ***AutoDelete Manager*** you can use to define a new configuration.
Open*	Ctrl-O	Lists active *AutoDelete* configurations, and opens a particular configuration's ***AutoDelete Manager*** upon selection.
Save*	Ctrl-S	Saves the configuration as a **Batch Delete** file **(.bdl**), with a name you assign.
Save as	n/a	Uses the specifications of the current, open configuration to create a new **.bdl** file.
(Recent File)	n/a	The names of Configuration files (.bdl) you've accessed recently.
Exit	n/a	Closes *AutoDelete.*

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AutoDelete Manager Menus (continued)

Menu/Item	Hot Keys	Description
Edit		
Select All*	n/a	Selects all batches listed in the **Batch Selection** area of the ***AutoDelete Manager***.
Clear Debug Table*	n/a	Removes accumulated Error Messages from the Debug table of the Engine database. ***Alert!*** According to your specifications, this table can record all changes to batch and task status for the current station. As a result, it can grow steadily and rapidly, until it is cumbersome.
Clear Audit Table*	n/a	Removes security entries in the Audit table of the Admin database.
Delete Now*	n/a	Deletes the files associated with any batch you have highlighted in the **Batch Selection** area of the ***AutoDelete Manager***.
View		
Toolbar	n/a	Inserts the *AutoDelete* toolbar just below the window's menu bar.
Status bar	n/a	Activates the status bar along the lower edge of the window.
Options*	n/a	Accesses the ***Options*** dialog (Page 16).
Load/Refresh*	n/a	Populates and updates the **Available Selection** area of the ***AutoDelete Manager***.
Apply Filter*	n/a	Populates the **Batch Selection** area.
Log File	n/a	Accesses the ***Log Options*** dialog. You can use the settings in this dialog to format and generate logs of *AutoDelete* activities (Page 24).
Help		
Aboutautodel		Presents background information on *AutoDelete*.

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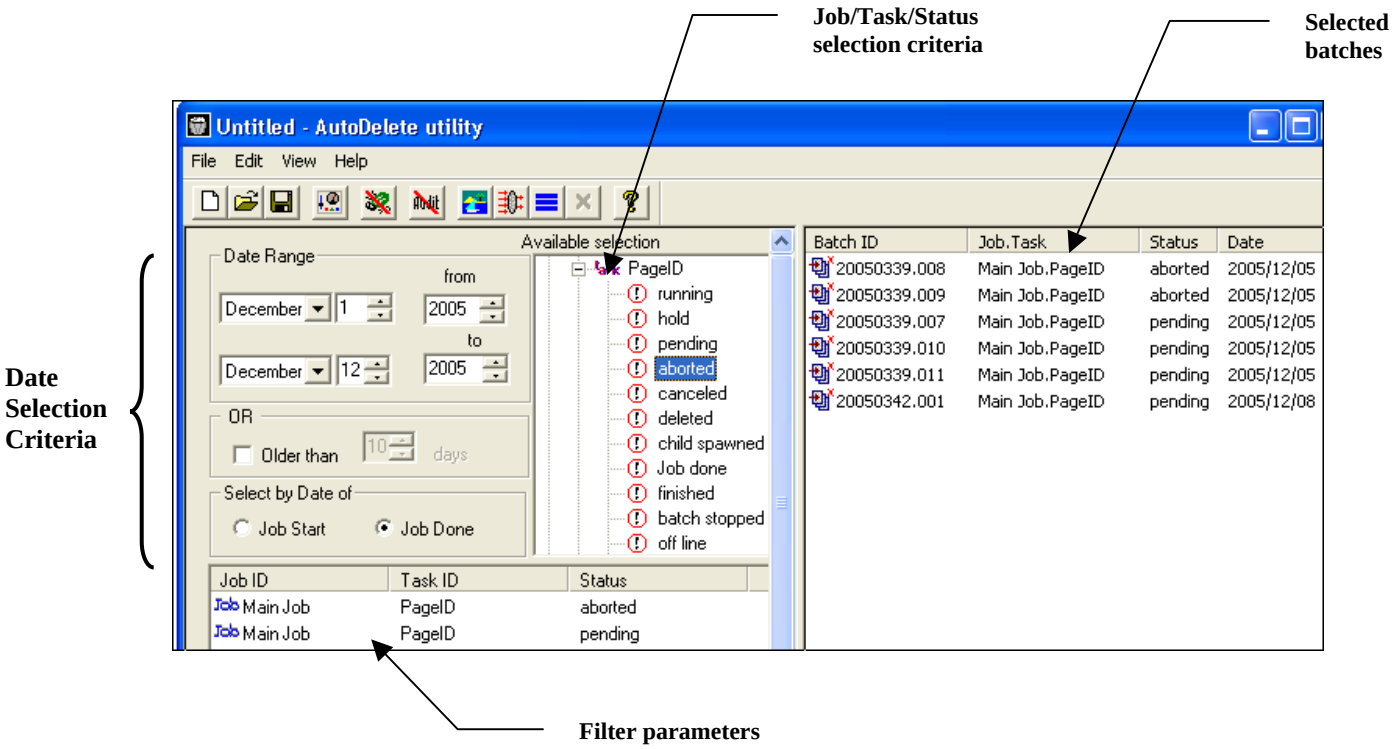

The ***AutoDelete Manager*** uses these menu items – along with toolbar icons (Page 12) and other interactive features (Page 13) - to isolate information in four areas:

Available Selection is a list of ***all*** Job/Task Combinations containing batches within their processing queues – and the statuses of those batches. The list is hierarchical; clicking on a + next to a job lists one or more tasks assigned to that job; clicking on a task reveals all possible statuses of the batches in a task's queue.

Date Range gives you a chance to limit the scope of your selection criteria to batches processed before a certain data, **OR** within a specific range. The date ranges for all batches begin when Job/Task Combinations start (**Job Start**) or end when Job/Task Combinations stop processing the batches (**Job Done**).

The **Date Range** specifications combine with **Job/Task/Status** specifications in the **Filter Selection Table** (below) to form a Batch Selection Filter. A filter can be saved as a Batch Delete file (.bdl).

The **Filter Selection Table** lists the choices you've made from the **Available Selection** area.

The **Batch Selection Area** displays the batches that meet your selection criteria, and is the scene of actual batch deletions.

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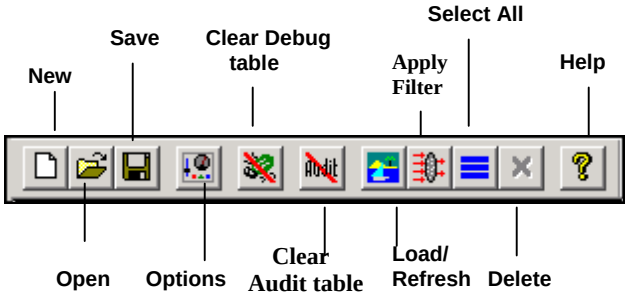
Toolbar

The ***AutoDelete Manager's*** toolbar has these icons:



Icon	Menu/ Item	Explanation
New	File/New	Opens an empty ***AutoDelete Manager*** you can use to define a new configuration. This icon also clears current selections.
Open	File/Open	Accesses the ***Open File*** dialog. You can us this dialog to open an active *AutoDelete* configuration (.bdl)
Save	File/Save/ Save as	Save the current configuration or accesses the ***Save as*** dialog if you're working with a new configuration.
Options	View/Options	Accesses the ***Options*** dialog (Page 16).
Clear debug table	Edit/Clear Debug Table	Deletes data in the Debug table of the Engine database.
Clear Audit table	Edit/Clear Audit Table	Deletes entries in the Audit table of the Admin database.
Load/Refresh	View/Load-Refresh	Loads and updates listings in the **Available Selection** area.
Apply Filter	View/Apply Filter	Generates batch listings in response to criteria in the **Filter Selection** area.
Select All	Edit/Select All	Highlights all listings in the **Batch Selection** area.
Delete	Edit/Delete Now	Deletes the batches that have been highlighted in the **Batch Selection** table on the right. ***Be very careful!*** Deletion occurs in response to settings you select in the ***Options*** dialog (Page 16). Be sure to consider the impact of individual settings ***and*** their combinations before you initiate actual deletion procedures.
Help	Help/About Autodel	Retrieves release information about *AutoDelete*.

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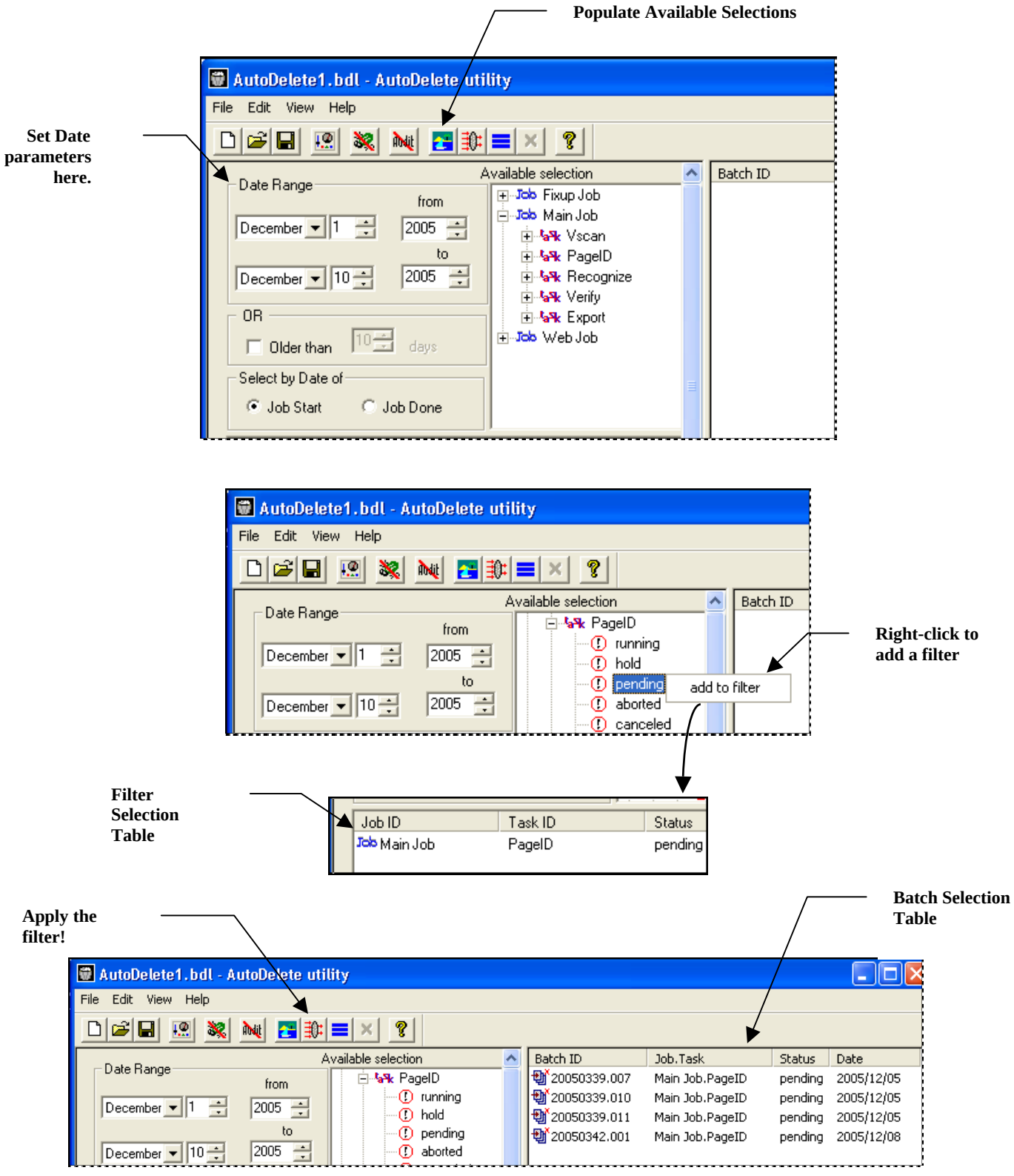

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Fields and Functions of the AutoDelete Manager

The table below describes the fields and functions of the ***AutoDelete Manager***.

Field/Function	Description
Date Range Area	This area defines a closed-end or open-end calendar period: after you have isolated the configuration's Job/Task/Batch Status criteria, *AutoDelete* will narrow in on and list batches processed during this period in the **Batch Selection Table** on the right.
From…to	Specifications defining a closed-end period ***from*** the upper date ***to*** - and including - the lower date.
Older than…	A check box which, if activated, directs *AutoDelete* to select batches associated with the specified Job/Task Combinations and statuses if they were ***created before*** *n* calendar days.
Select by Date of	Options indicating if the batch selection **Date** ranges open when Job/Task Combinations start processing batches…or close when Job/Task Combinations stop processing batches. You must select an option. **Job Start** means that a batch must have been initiated by a filter's Job/Task Combination at some point within the Date range. Batches started earlier are not eligible but *AutoDelete* does not care when a Job/Task Combination finishes with the batch. **Job Done** means that batch processing by a Job/Task Combination can start at any time – even well before the Date range - ***as long as*** it concludes within the Date range.
Available Selection	A hierarchical listing of Job/Task Combinations that currently have batches in their processing queues, and the statuses of those batches. Often, you'll focus on batches that have been fully processed by a job's Export task, with a status such as *Job Done*…or, perhaps, *Aborted*. This means that the batch no longer needs to be in the workflow but has yet to be deleted. If you highlight an item, right-click, and press the Add to Filter button, the criteria moves down to the **Filter Selection Table**.

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AutoDelete Manager (continued)

Field/Function	Description
Filter Selection Table	Each row in this table, at the bottom of the ***AutoDelete Manager***, identifies a job, one of its tasks, and all processing statuses that the task can assign to any batch in its queue. Rows appear in this table when you 1.) select a job, task or Batch Status from the list in the **Available Selection** field; 2.) right-click; and 3.)select the *Add to Filter* option to transfer the data to this area. In the sequence of illustrations on Page 13, the Administrator has selected a *1040EZ* job (Main Job) from the **Available Selection** field, its PageID task, and batches in the task's queue with a *Pending* status. In the **Filter Selection Table**, *AutoDelete* has listed these parameters. If the Administrator had selected a particular task from the Main Job listing in the ***Available Selection*** field, *AutoDelete* would have listed all Job/Task/Batch Status criteria for that task in the **Filter Selection Table**. ***Important!*** *AutoDelete* lists batches designated by all filters in this area as soon as you select one.
Batch Selection Table	Each row in this table identifies a batch that meets the criteria of the **Filter Selection Table**. If you a highlight a row of the **Filter Selection Table,** then press the **Apply Filter** icon, *AutoDelete* will fill in the rows of the **Batch Selection Table** with codes identifying every batch meeting all filter selection criteria. The columns of the **Batch Selection Table** specify: **Batch ID**: the identifying code of a specific batch. **Job.Task**: a Job/Task Combination that has processed the batch. **Status:** the status of the batch after processing by the Job/Task Combination (above). **Date:** the date on which this Job/Task Combination processed the batch and assigned the status. Later, if you select a row of the **Batch Selection Table** and click on the **Delete** icon, *AutoDelete* will purge the files of that batch according to the specifications you enter in the ***Options*** dialog (Page 16).

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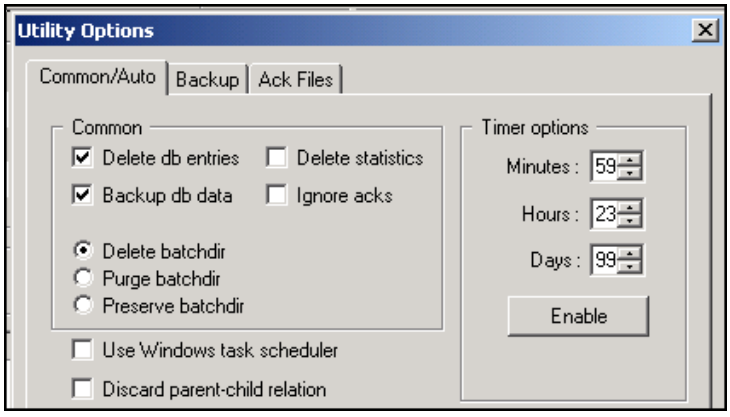
Features of the Options Dialog

Together, the settings in the three tabs of the ***Options*** dialog comprise the other component of the current *AutoDelete* configuration. These settings determine how *AutoDelete* is to handle the deletion of the batches designated in the ***AutoDelete Manager***.

To access this dialog, select **Options** from the **View** menu. The next few pages describe the settings of each tab.

Common/Auto Tab

This tab contains processing specifications that will apply to the deletion of information, folders and files for every batch you select, as well as scheduling mechanisms for automatic deletion (Page 32).



Options Dialog – *Common/Auto tab*

Options Dialog—*Common/Auto Tab*

Field/Function	Description
Common Area	The processing specifications you designate in this area apply to ***all*** deletions of the current *AutoDelete* configuration.
Delete DB Entries	A check box which, if activated, removes records from three tables of an application's Engine database: **TMBatch**, **Queue** and **QStats**. The records in these key tables contain current and historical details about each batch as it moves through the various Job/Task Combinations of a workflow. ***Alert!*** Choosing this option eliminates processing information about a batch but does ***not*** eliminate the batch folder and its contents.

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Options Dialog—*Common/Auto Tab (continued)*

Field/Function	Description
Delete Statistics	A check box which, if activated, removes batch records from the Statistics tables of individual tasks. These records are *added* to a Statistics table when a task in a particular task category processes the batch.
Delete DB Entries ***and*** *Delete Statistics*	If you activate ***both*** check boxes, *AutoDelete* will remove rows with information about the deleted batches ***from all tables*** of the Engine database.
Backup DB Data	A check box which, if activated, directs *AutoDelete* to copy the rows that are about to be removed from tables of the Engine database, and add them to a backup database. If you select his option, you ***must*** provide the name and location of the backup database in the fields of the *BackUp* tab (Page 18).
Ignore Acks	A check box which, if activated, directs *AutoDelete* to forego a search for **Acknowledgement** files or lists when deleting batches (Page 21).
Batch Directory Options	The radio button options in this group determine the scope of the actual batch deletion process. You ***must*** select one.
Delete BatchDir	Directs *AutoDelete* to delete batch folders, and all files placed in a batch by *Taskmaster* jobs and tasks. This ***default*** option does ***not*** remove files from other, external sources.
Purge BatchDir	Directs *AutoDelete* to deletes the folders and ***all*** files of the batches you select. ***Alert!*** If you choose this extreme option, *AutoDelete* issues a warning about the consequences of such a step.
Preserve BatchDir	Directs *AutoDelete* to retain the folders and files of the batches you select (Page 47). This option can prove very helpful when you are setting up and testing a configuration.
Timer Options	*AutoDelete* can automatically delete batch files in response to specifications in the configuration's **Filter Selection Table** (Page 13) and your designation of **Day**, **Hour** and **Minute** parameters in this area. For an explanation of *AutoDelete's* automatic processing features, see Page 32.

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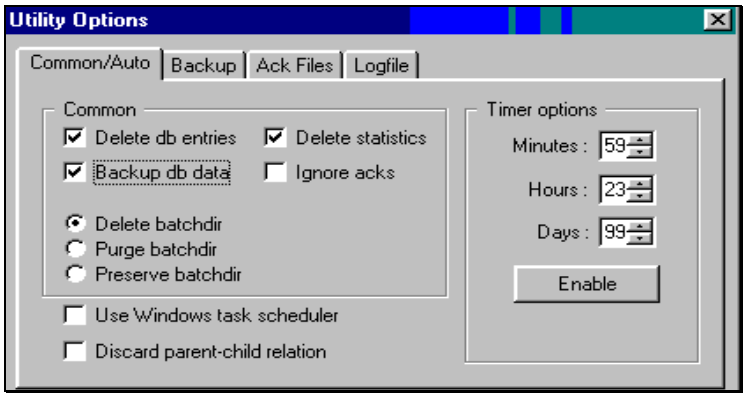
Options Dialog—*Common/Auto Tab (continued)*

Field/Function	Description
Enable Button	Pressing this button activates the *AutoDelete* Timer. Pressing the button again de-activates the Timer.
Use Windows Task Scheduler	A check box which, if activated, initiates an alternative *automatic* procedure – the **Task Scheduler** (Page 34). If you activate this check box, the tab's **Timer Options** become unavailable.
Discard Parent-Child Relation	A check box which determines whether or not the **Batch Selection Table** of the ***AutoDelete Manager*** will display multiple listings for a single batch that has been "branched" from a parent job to a child job such as FixUp for special processing – then returned to the parent job. If you select this option, *AutoDelete* will separately display all listings that meet the selection criteria. As a result, listings of batches processed by a child job appear in the **Batch Selection Table** only if the child job has been designated as a Filter parameter. If you do not select this option, *AutoDelete* will automatically display those child job listings that are directly linked to a parent Job/Task Combination in the **Filter Selection Area.** However, *AutoDelete* will ***not*** separately display listings for batches processed by the child jobs. For a complete explanation of the ways in which *AutoDelete* handles branching and splitting, see Page 46.
OK Button	Adds the settings of the ***Options*** dialog to the configuration and returns you to the ***AutoDelete Manager***.
Cancel Button	Returns you to the ***AutoDelete Manager*** without adding new or changed settings to the configuration.
Apply Button	*Inactive.*



Options Dialog - *Common/Auto Tab*

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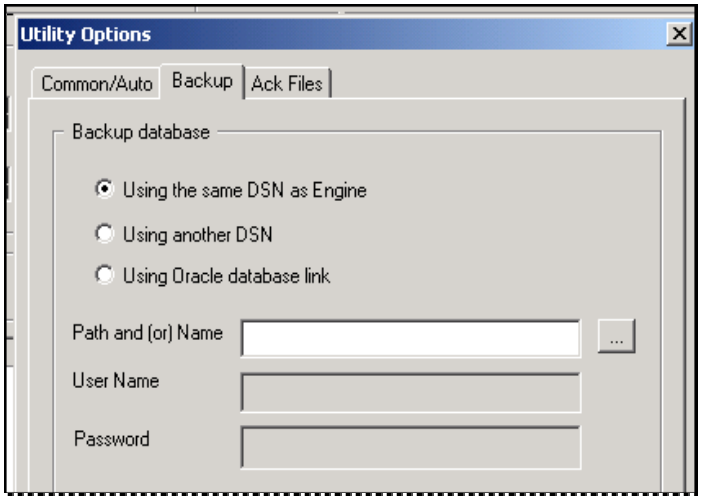
Backup Tab

If you activated the **Backup DB Data** check box on the *Common/Auto* tab (Page 16), you'll use the *Backup* tab to specify the name and location of the backup Engine database, and the type of database.

✓ The tab's format and content change slightly, depending on your choice of a **Backup Database** radio button.



Options Dialog—*Backup Tab*
Same DSN

Options Dialog—*Backup Tab*

Field/Function	Description
Database	Radio buttons identifying the relationship between the current **Engine** database and a backup Engine database. You must select an option in this group.
Using the same DSN as Engine	Uses the Data Source Name (DSN) of the primary Engine database to identify the backup database. If you select this option, you must enter the path to the folder that will hold the backup database in the **Path and (or) Name** field.
Using another DSN	Uses a database with a different Data Source Name to store backup information. If you select this option, the Database ID field asks you to supply the database's **ODBC DSN** (illustrated on the next page.)

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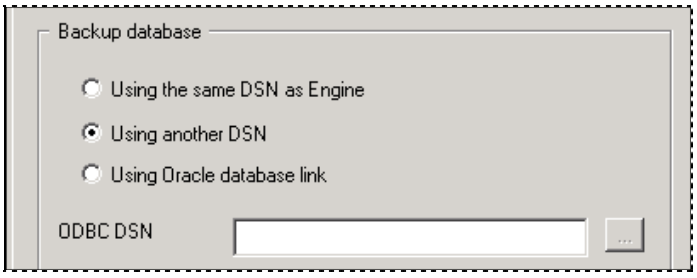
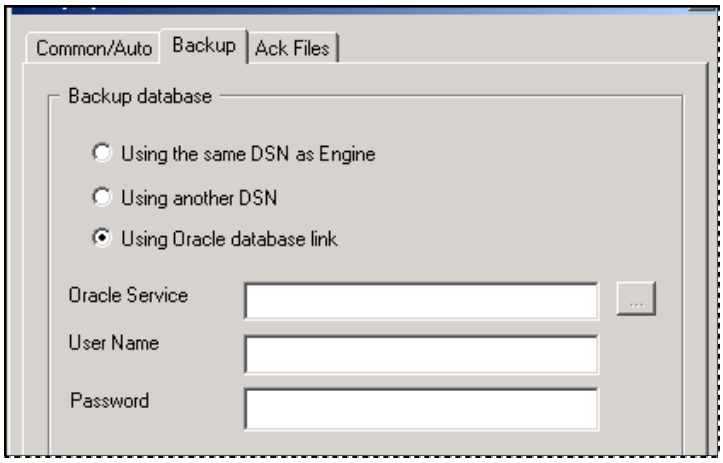


Options Dialog—*Backup Tab*
Another DSN

Options Dialog—*Backup Tab (continued)*

Field/Function	Description
Using Oracle Database Link	Indicates that the backup Engine database is an Oracle database. This option **requires** three specifications illustrated below: • The identity of the Oracle service that contains this backup database. • The unique User Name associated with the database. • The unique User Password associated with the database.



Options Dialog—*Backup Tab*
Using an Oracle Database Link

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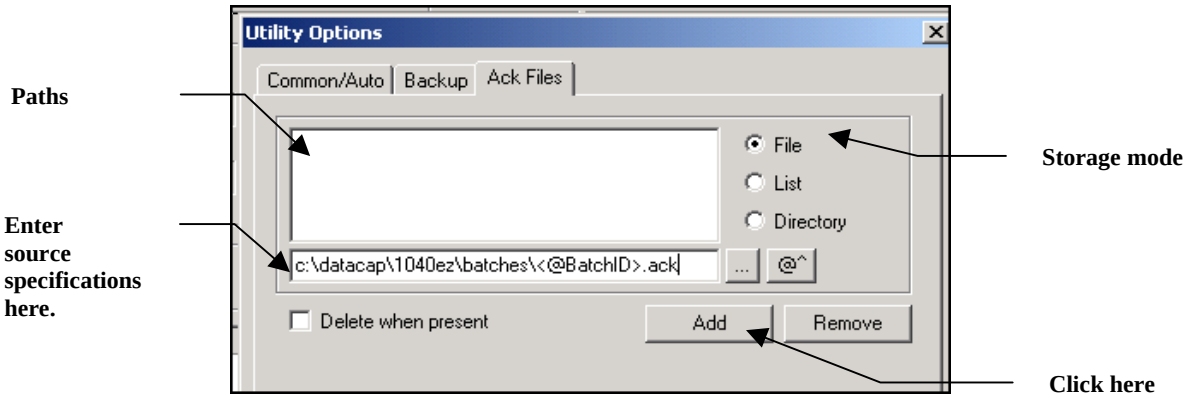
Ack Files Tab

If you did ***not*** select the **Ignore Acks** option on the *Common/Auto* tab (Page 16), *AutoDelete* is going to search for "acknowledgement" information before deleting any batch files.

An*acknowledgement* is a record of responses generated by an external system, usually after an Export task completes its work and "uploads" verified data. Often, receipt of the acknowledgement confirms both this task's success and the success of the overall workflow.

The parameters of the individual Upload process determine the format of the acknowledgement - and its storage as a single **File** or as part of a **List**, or its placement within a specific **Directory**. When defining the current configuration, you can direct *AutoDelete* to look in one location, or in many.



Options Dialog—*Ack Files Tab*

Your selection of a Storage Mode from the radio buttons on the right combines with source specifications you enter to provide *AutoDelete* with the identity and site of a particular type of acknowledgement information. In the example above, the Administrator has selected **File** as the type of data source and has specified the generic name of these files (**<@batchID>.ack)** and their location, in the source field.

Clicking once on the Add button moves this set of specifications to the **Paths** field in the center of the tab (see the illustration on the next page.)

File, List and Directory Options

If you designate **File** as the storage type, *AutoDelete* will look for a file corresponding to ***each*** batch that is ready for deletion. In the example above, these files have an **.ack** extension, but you can specify any extension (.**txt**, for example).

If you select **List**, *AutoDelete* will look for and interrogate ***one*** file with a *list* of all acknowledged batches. The List file can reside in any location you specify.

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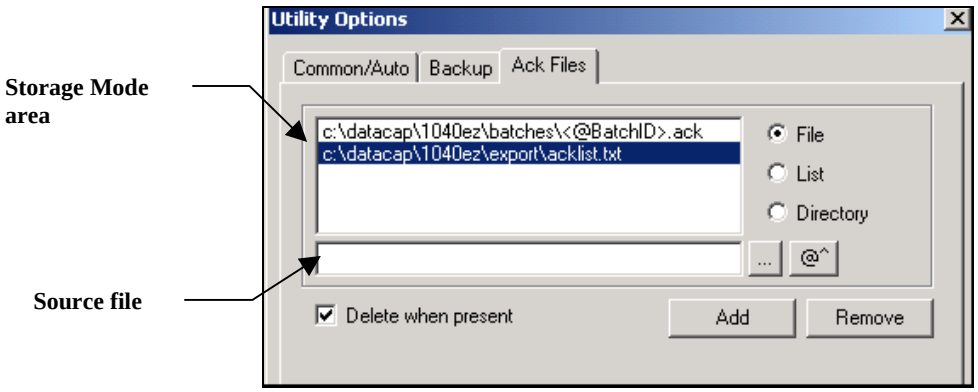
If you select **Directory**, the specification in the **Source** field will identity the name and location of a particular directory. *AutoDelete* will then treat ***all*** files in this directory as List files, and will look for acknowledgements throughout the directory.

In the illustration below, the Administrator's specifications direct *AutoDelete* to look for individual **.ack** files in the batch folders of the **Batches** directory, and for an acknowledgement list in the **Export** directory.



Options Dialog – *Ack Files Tab*

The table below reviews the fields and functions of this tab.

Field/Function	Description
Paths	One or more specification sets, each indicating the names and locations of the sources of acknowledgment information – files or lists. A specification set is linked directly to one of the three Storage Mode options (below).
Storage Mode area	Storage options for acknowledgement data include: **File.** Data can be found in individual files. A file contains information about a single batch. **List.** One file contains a list of acknowledged batches. **Directory.** Multiple List files reside in the directory you identify in the **Source** field.
Source	The name of the applicable file or directory, and its path.
Ellipsis Button (…)	In response to your selection of a Storage Mode (*File*, *List* or *Directory*), this button links you to the ***Open File*** dialog or to the ***Directory Browser.***

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Options Dialog—*Ack Files Tab (continued)*

Field/Function	Description
@^ Button	Accesses a short list of System Variables. When specifying the name and path of a storage site, you can indicate the use of a variable to identify specific sites. In the example, `C:\datacap\1040ez\Batches\<@BatchID>.ack` includes `@BatchID` as a System Variable.
Add Button	Adds a specification set you've entered in the **Source** field to the **Paths** list. ***Remember:*** this specification set includes the designation of a Storage Mode.
Remove Button	Removes a highlighted specification from the **Paths** list.
Delete When Present	A check box which determines whether or not *AutoDelete* will delete batch files after searching for corresponding acknowledgement files. If checked, and **.ack** files are found, *AutoDelete* will remove the batch files. If checked and **.ack** files are not found, *AutoDelete* will not remove the batch files. If ***not*** checked and **.ack** files are found, *AutoDelete* will not delete batch files. If ***not*** checked, and ack files are not found, *AutoDelete* will delete the batch files.

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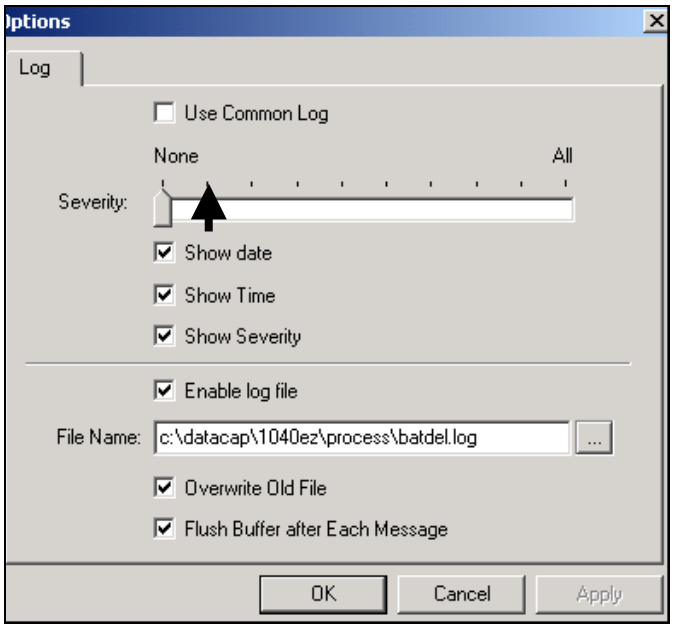
AutoDelete Logs

AutoDelete can generate a Log file while carrying out its deletion activities, add log data to a "common" *Taskmaster* log – or both!

The ***Log Options*** dialog has the specifications you need to configure Log procedures. To access this dialog, select **Log File** from the **View** menu of the ***AutoDelete Manager***:



Log Options dialog

The dialog's settings include:

Setting	Description
Use Common Log	A check box which, if activated, directs *AutoDelete* to add Log messages to *Taskmaster's* Common Log*.
Severity	A continuum that measures the relative importance of problems *AutoDelete* is likely to encounter and report in the Common Log and/or in its own Log file. As the pointer moves to the right, severity drops while the scope and number of problems increases. As you move the pointer leftwards, only the more critical problems are considered and, steadily, the number of logged problems diminishes. ***Alert!*** If the pointer is at the first hash mark from the left, the log is restricted to details of batch deletion; this replaces the logging function in previous versions of *AutoDelete.* Moving the pointer all the way to the right results in logs for debugging.

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Log Options dialog (continued)

Setting	Description
Show Date	A check box which, if activated, adds the Date to each message in the log.
Show Time	A check box which, if activated, adds the Time.
Show Severity	A check box which, if activated, adds a Severity Code to each message.
Enable Log File	A check box which, if activated, directs *AutoDelete* to update a Log file created exclusively for this utility. If a file is not present, *AutoDelete* will create it, using the name you supply in the **File Name** field.
File Name	The name and path of the Log file. If you have selected the **Enable Log File** option, you **must** complete this field.
Overwrite Old File	A check box which, if activated, directs *AutoDelete* to replace an earlier Log file with a current file if they share a name and location. If you intend to append messages to existing Log files, do ***not*** select this option.
Flush Buffer after Each Message	A check box which, if activated, means that *AutoDelete* will continuously transfer messages from a mid-stream buffer to the log as batch deletion proceeds. If you do **not** select this feature, *AutoDelete* will store messages in a buffer for a particular period. This alternative increases processing speed but compromises safety: if an error occurs, you may lose the messages in the buffer.

**Taskmaster* will generate a Common Log of its activities if you:

- Select **General** from the ***Taskmaster Window's*** **Settings** menu;
- Select **Log Options.**
- Provide applicable specifications in the resulting dialog's *Log Options* tab.

For more information, see *Taskmaster* Help or Chapter 3 of the *Taskmaster Windows & Dialogs Reference.*

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Defining and Running *AutoDelete* Configurations

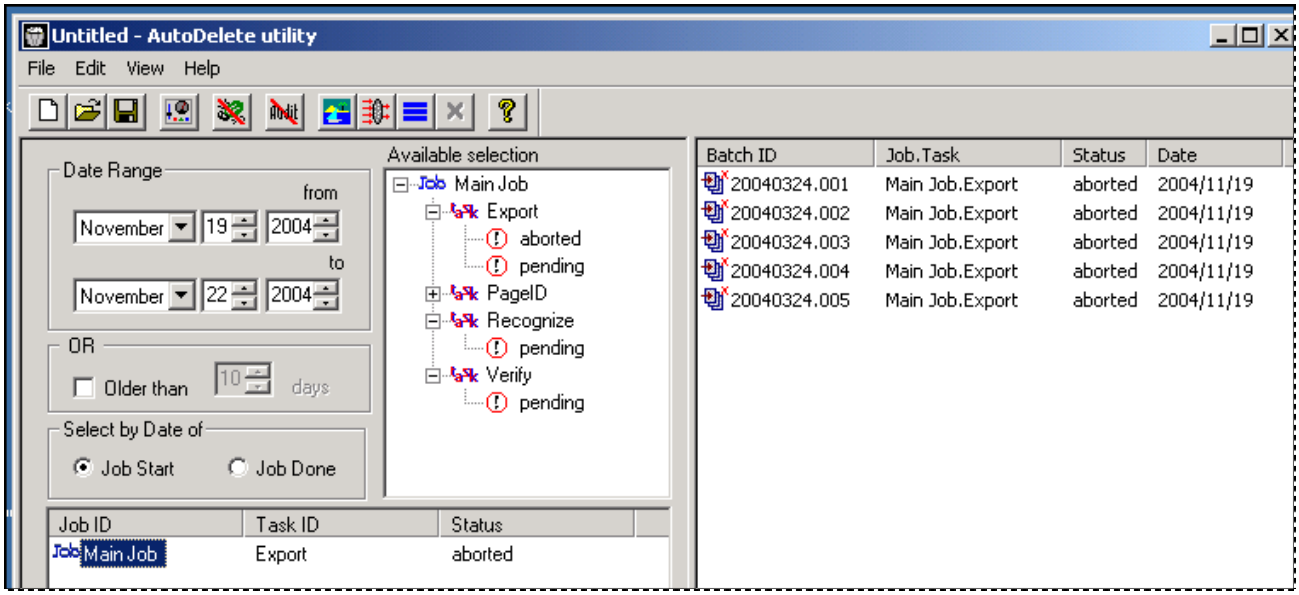
The steps you'll take to construct and run an *AutoDelete* configuration are outlined on the following pages. Before you begin, however, carefully consider these concerns and recommendations:

Deletion of batch data and/or files is ***irreversible***. Take extra time to draw up a plan identifying the nature of the batches you may choose to delete. Review the plan carefully and repeatedly as you define *AutoDelete* configurations.

In most cases, configurations with limited scope are easier to work with than those deleting many batches. Before adding more items to the **Filter Selection Table** of the ***AutoDelete Manager,*** conduct tests with those already there.

AutoDelete's ability to automatically delete files and data deserves early and ongoing scrutiny. Again, be very careful with the content of the **Filter Selection Table**: in an automatic setting, *AutoDelete* uses your specifications to delete files regularly.

Because of important distinctions between the development of *manual* and *automatic* configurations, the following sections treat each separately. (Page32 covers *automatic* configurations.)



AutoDelete Manager

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Manual Configurations

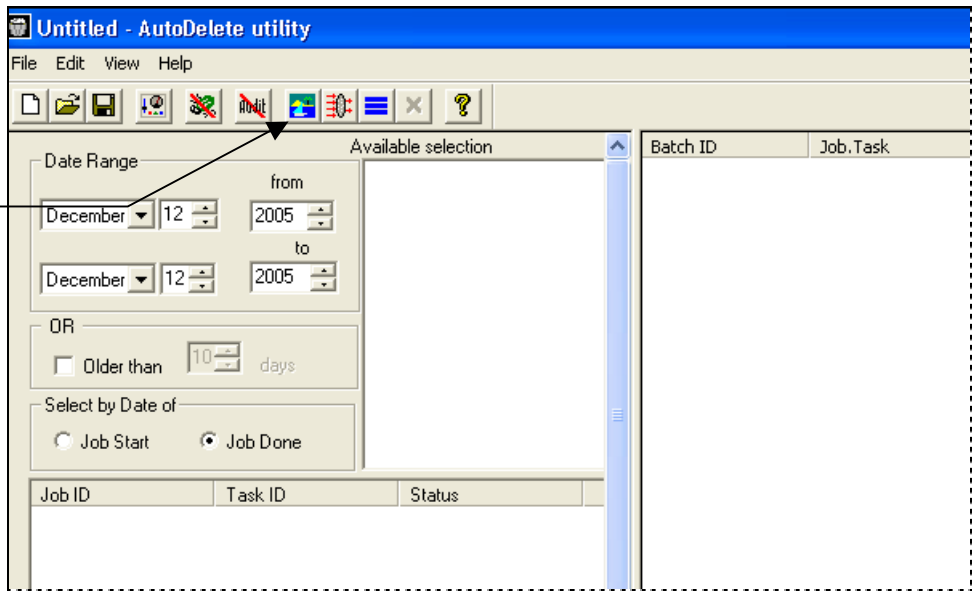
To define a *manual* configuration for a particular application, take these steps:

Step	Action

1. Be sure Taskmaster Server Service is up and running.

2. Double-click on the application's **AutoDelete** shortcut icon (Page 4). An empty ***AutoDelete Manager*** will appear on your screen, with ***today's*** date in the **Data Range** fields.

Load/refresh icon.



3. If you intend to use (and perhaps modify) the specifications of a previously defined *AutoDelete* configuration, use the **File** menu or **Open File** icon to select the appropriate Batch Delete file (.bdl) from the application's **Process** directory. Go to Step #7.

4. Enter **Date Range** parameters or an **Older than** number to provide *AutoDelete* with the search criteria it needs to populate for the **Available Selection** area.

5. Select the **Job Start** or **Job Done** option (Page 14).

6. Click on the toolbar's **Load/Refresh** icon to provide the **Available Selection** area with a hierarchical list of Job/Task Combinations that have batches in their queues, and the various statuses of those batches (illustrated on the next page.)

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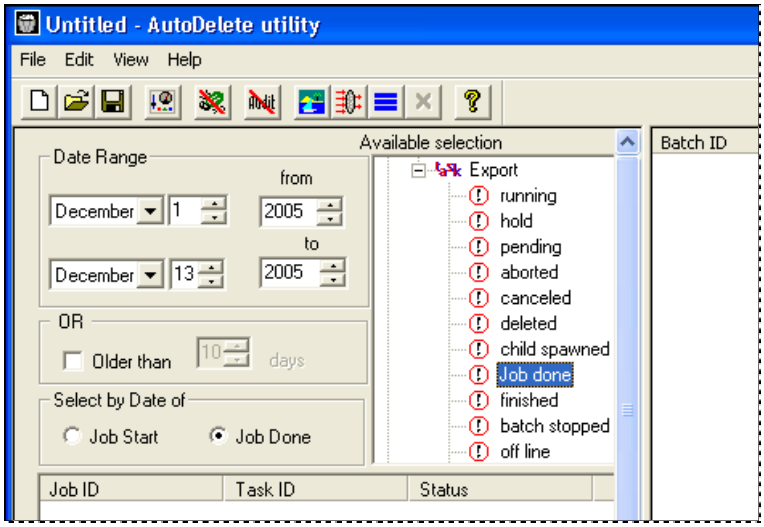
To Define and Implement Manual Deletions (continued)

Step	Action

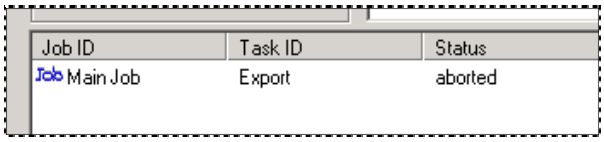
7. Examine the listings in the **Available Selection** area ***very carefully*** to determine which are to serve as batch selection criteria for this deletion.

8. For each item, highlight the applicable level with your left mouse button, then click on it with your ***right*** mouse button.



9. Press *Add to Filter* when the button appears.

10. Confirm that the listing has moved to the **Filter Selection Table** of the ***AutoDelete Manager.*** (To remove an entry from this area, right-click on it and select *Remove from Filter* button when the button appears.)



11. Review and, if appropriate, modify the settings in the **Date Range** area.

12. After you have selected both Job/Task/Status and Date criteria, click on the toolbar's **Apply Filter** icon. In the **Batch Selection Table**, *AutoDelete* will list batches that meet your ***initial*** selection criteria.

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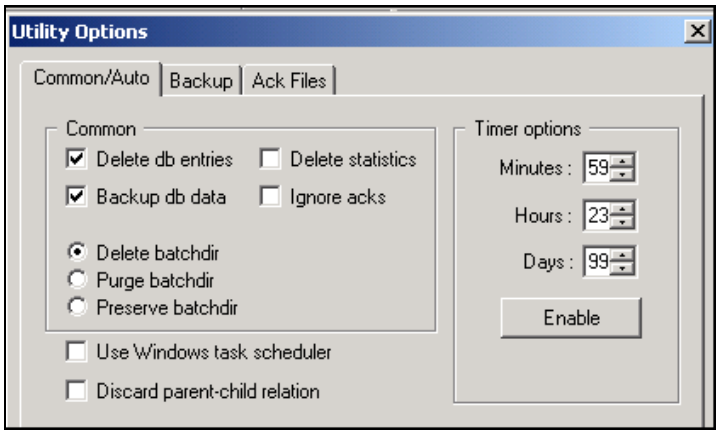
To Define and Implement Manual Deletions (continued)

Step	Action

13. To refine your selection criteria, press the **Options** icon on the toolbar: the *Common/Auto* tab of the ***Options*** dialog will appear on your screen.



14. If *AutoDelete* is to remove records from the **TMBatch**, **Queue**, and **QStats** tables of the Engine database during deletion, activate the **Delete DB Entries** check box. *(We recommend this step.)*

15. If *AutoDelete* is to remove records from the applicable Task Statistics tables in the Engine database during deletion, activate the **Delete Statistics** check box. *(We recommend this step.)*

16. If *AutoDelete* is to remove records from ***all*** tables of the Engine database during deletion, activate the **Delete DB Entries** check box and the **Delete Statistics** check box. *(We recommend this step.)*

17. If *AutoDelete* is to copy rows of the Engine database that are to be removed, and add them to a backup database, activate the **Backup DB Data** check box… then specify the name and location of the database in the *Backup* tab.

18. If *AutoDelete* is ***not*** to search for acknowledgement files during the deletion process, activate the **Ignore Acks** check box.

19. If *AutoDelete* is to remove batch folders and all batch contents generated by *Taskmaster*, but leave "external" files untouched, select **Delete BatchDir.** (This is the default **Batch Directory** setting.)

20. If *AutoDelete* is to remove the batch folders and ***all*** batch contents of the selected batches, select **Purge BatchDir** and click on the OK button when the warning appears.

21. If *AutoDelete* is to leave batch folders and batch contents intact (during testing, perhaps) select **Preserve BatchDir.**

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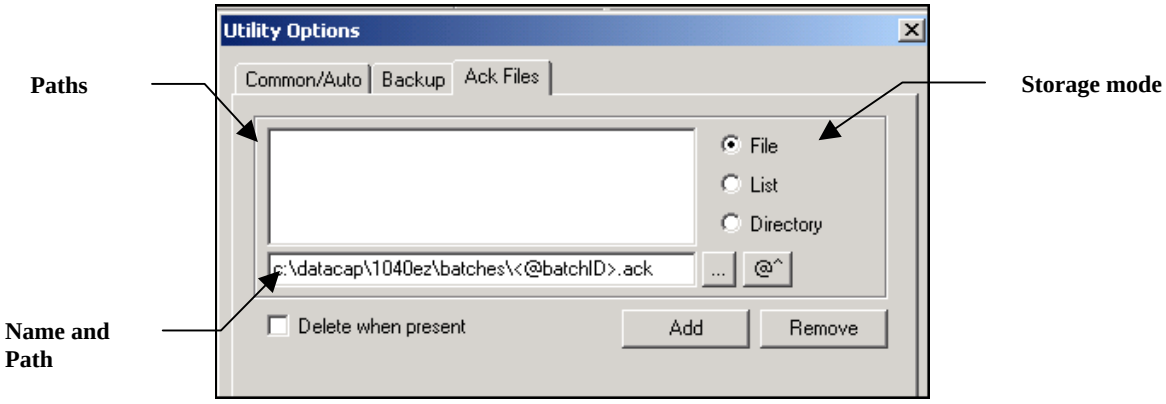
To Define and Implement a Manual Deletion (continued)

Step	Action

22. If *AutoDelete* is to group batches according to Job/Task Combination without regard for any parent-child relationships, activate the **Discard Parent-Child Relation** check box. If *AutoDelete* is to list batches processed by child jobs only if a child job can be linked to its parent job, do ***not*** select this option. (In the illustration accompanying Step #13, this option has not been checked.)

23. If the deletion process for this configuration will direct *AutoDelete* to check for acknowledgement files before deletion occurs, go to the next step. Otherwise, go to Step 27.

24. Select the *Ack Files* tab of the ***Options*** dialog: you'll use this tab to identify the nature and possible locations of acknowledgment files *AutoDelete* is to find before determining whether or not to delete batch files.



25. To specify a source Storage Mode, select **File**, **List** or **Directory.**

26. Enter file/directory name and path specifications in the **Source** field.

27. Press the Add button to add the specifications to the **Paths** area in the middle.

28. Determine whether or not to activate the **Delete when Present** check box (Page 21).

29. Review the settings of the ***Options*** dialog.

30. Press the OK button at the bottom to add these settings to the configuration and return to the ***AutoDelete Manager***.

31. If the configuration is to update a Common Log or generate a Log file whenever it runs, select **Log File** from the **View** menu. Use the descriptions on Page 24 to select your Log parameters.

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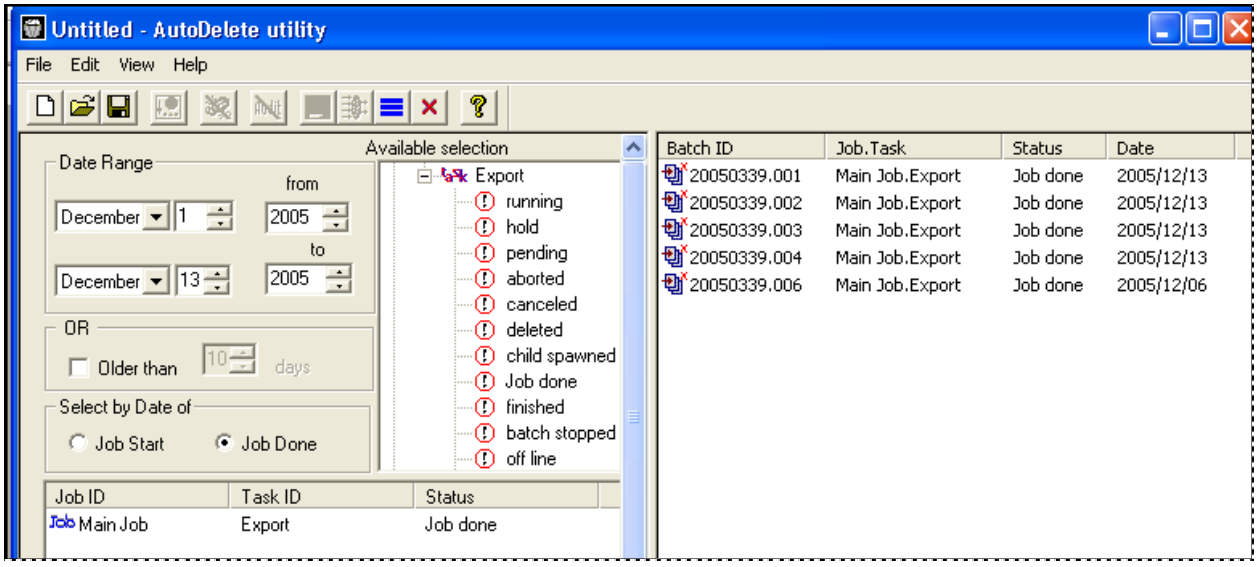
To Define and Implement a Manual Deletion (continued)

Step	Action
32.	Review and, if necessary, modify the selection parameters you entered previously.
33.	Click again on the **Apply Filter** icon to update the **Batch Selection Table.**
34.	Highlight one or more batches in the **Batch Selection Table.**
35.	Press the toolbar's **Delete** (**x**) icon or select **Delete Now** from the **Edit** menu to initiate the deletion process.
36.	If you filled in the ***Log File*** dialog in Step # 30, *AutoDelete* will generate a deletion log (Page 46) or update a Common Log. For a review of the processed deletions, access the log.
37.	If you are satisfied with the results of this deletion, you can save the Configuration Definition as a Batch Delete file (.bdl) by selecting **Save** or **Save as** from the **File** menu. Later, you can retrieve the file from the application's **Process** directory and run it again by selecting **Open** from the **File** menu or pressing the **Open** icon on the toolbar.



AutoDelete Manager – *Selected Batches*

☛ ***Important!*** Use your **Datacap Taskmaster Test** configuration to define and implement various combinations of batch selection parameters and deletion options (Page 16).

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Automatic Configurations

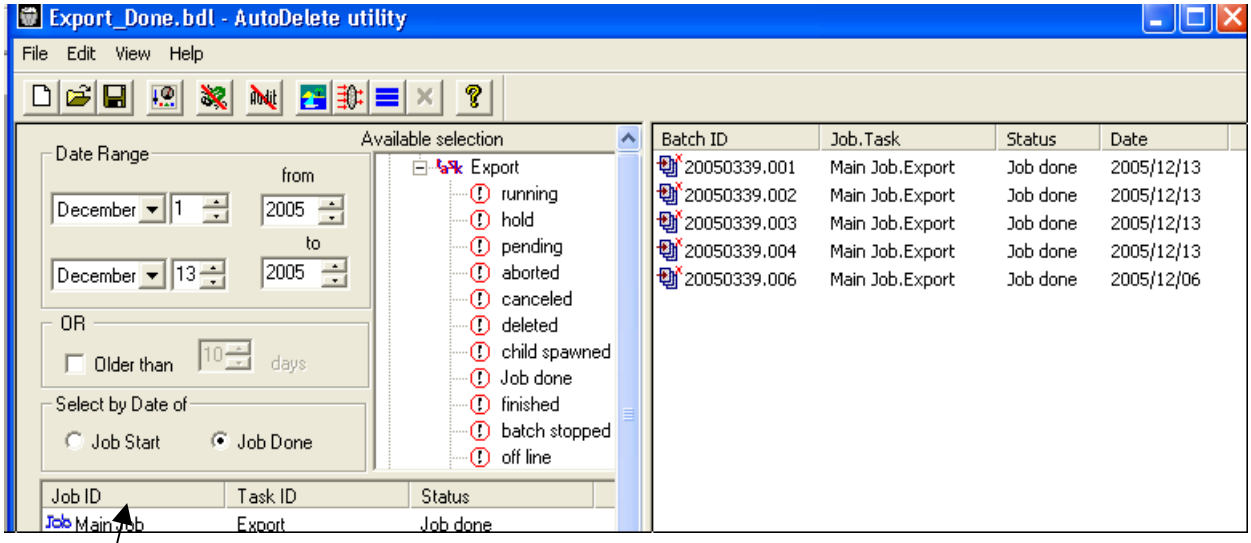
Defining a configuration to delete files from the File Server ***automatically*** requires additional planning and preparation. Three *AutoDelete* components require your special attention. These include:

- the **Filter Selection Table** of the ***AutoDelete Manager*.**
- the **Timer Options** area in the *Common/Auto* tab of the ***Options*** dialog.
- the **Use Windows Task Scheduler** check box in the ***Options*** dialog.

In the example below, the Administrator has placed a listing in the **Filter Selection Table**—a listing that designates a single Batch Status for the Export task assigned to the Main job.

AutoDelete Timer

If *AutoDelete* operates in response to parameters of the **AutoDelete Timer** in the *Common/Auto* tab of the ***Options*** dialog (see the next page), deletion will begin approximately ***one minute*** after you click on the Enable button. Subsequent deletions will occur automatically after each ***interval*** defined in the **Timer Options** area.



AutoDelete Manager

Filter criteria

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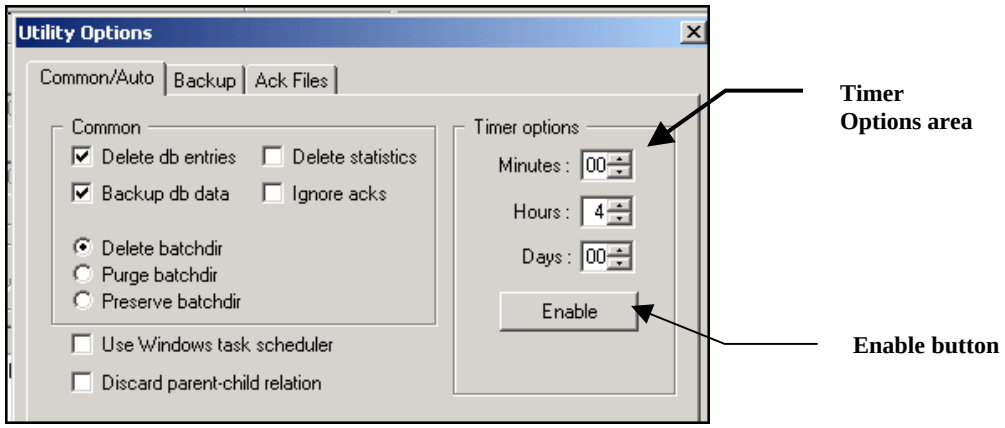

Options Dialog—*Common/Auto Tab*

In the example above, *AutoDelete* will run every four hours after the Administrator clicks on the Enable button – selecting and deleting batches in response to the Filter criteria in the ***AutoDelete Manager.***

✓ Be sure to save this timing mechanism and its accompanying selection criteria as a separate configuration in its own Batch Delete file (.bdl). Alert! This timer will work only when *AutoDelete* and this Batch Delete file (.bdl) are open.

To setup a scheduler using *AutoDelete's* **Timer** options (illustrated above), take these steps:

Step	Action
1.	Open the ***AutoDelete Manager***.
2.	Take Step #1- Step #8 on the previous pages to establish a distinct *AutoDelete* configuration which can support regular, recurring deletion activity.
3.	Save the configuration as a Batch Delete file (.bdl).
4.	Open the ***Options*** dialog.
5.	Enter the schedule's parameters in the **Timer Options** area of the *Common/Auto* tab.
6.	Click on the Enable button, then on the OK button.
7.	Once again, save the configuration.

✓ The Enable button is ***not*** available if you have selected the **Use Windows Task Scheduler** option.

✓ To disengage the timer, click again on the Enable button.

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Windows Task Scheduler

The **Task Scheduler** works differently. If you select **Use Windows Task Scheduler** in the *Common/Auto* tab of the ***AutoDelete Manager's Options*** dialog (below), *AutoDelete* "grays out" the **Timer Options** settings. You can then use the ***Windows Task Scheduler Wizard*** to define the nature and scope of *AutoDelete's* automatic operations.

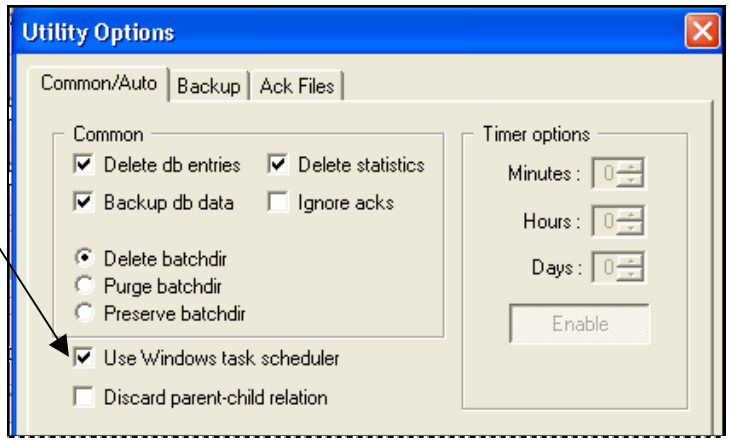
Please note: The paragraphs below summarize the role of the ***Task Scheduler Wizard*** in a Windows 2000 or XP environment. Setup procedures will vary slightly, according to the operating system you're using.

✓ We strongly recommend that you configure the **Windows Task Scheduler** in a Test environment, using an application such as *1040EZ*, before implementing it as a component of your application.

First Steps

Activate the **Use Windows Task Scheduler** check box in the *Common/Auto* tab of the ***Options*** dialog (Page 16), and save the updated *AutoDelete* configuration as a Batch Delete file (.bdl). ***Alert!*** This is a ***required*** preliminary step; you cannot use thisfeature with *AutoDelete* unless you first select this option.

Select this option.



Open your computer's ***Control Panel*** and select **Scheduled Tasks**.

In the ***Scheduled Tasks*** dialog, double-click on the *Add Scheduled Task* option to open the Scheduled Task ***Wizard*** (illustrated on the next page.) Alternatively, you can double-click on the **Task Scheduler** icon in your Windows taskbar, if it is available.

Scheduling Criteria

After an introductory screen, the wizard's *Program Selection* screen asks you to identify the program you're scheduling.

Be sure to select the *AutoDelete Utility*, and press the Next button.

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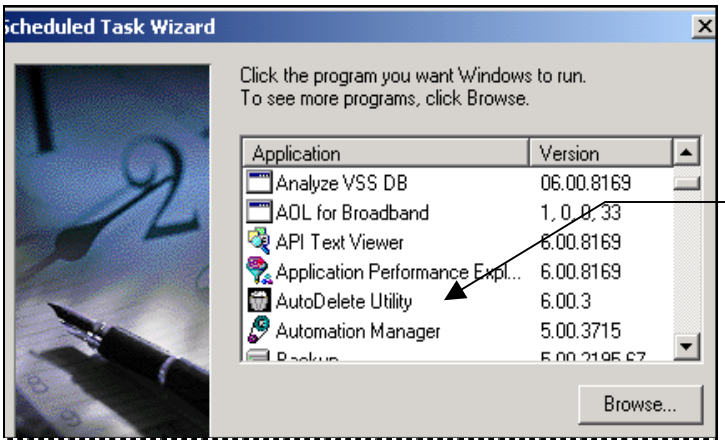
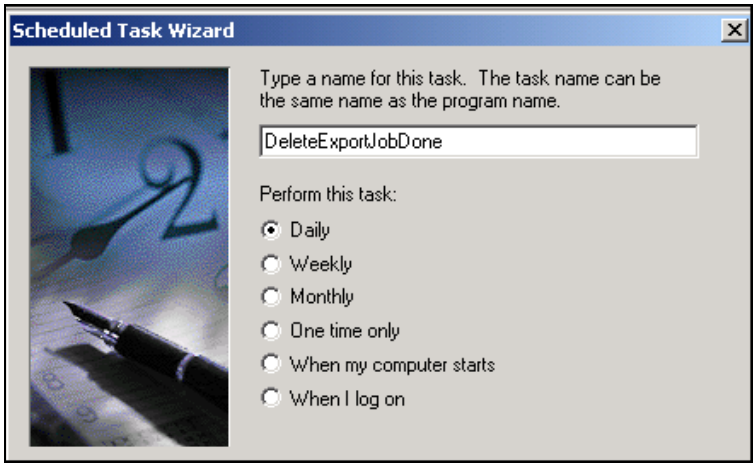


Program Selection Screen

The third screen (below) gives you a chance to assign a name to this scheduled procedure – a name that more precisely indicates its target(s) and scope.

Alert! This screen requires a selection from its **Frequencies** list: the format and content of the subsequent *Scheduling Detail* screen (shown on the next page) changes according to your choice of frequency.



Scheduling Information Screen

✓ We recommend that you select *Daily* to set up a Test procedure.

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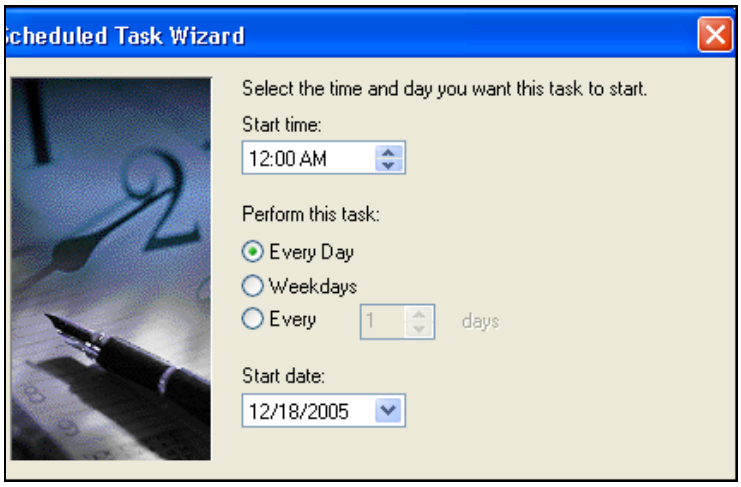

Scheduling Detail Screen

The example above shows parameters for a "daily" deletion schedule. As you can see, the *Scheduling Detail* screen is fluid: *AutoDelete* can remove batch data and files:

- Every day of the week; *or*
- On weekdays only (Monday – Friday); *or*
- On every *n*th day.
- At a particular time.
- Beginning on a particular date.

When you click on the Next button, the Task Security screen will ask you for security parameters. If the parameters you enter are valid, the **Windows Task Scheduler** will be able to delete batches – automatically – in response to the *AutoDelete* configuration you have prepared.

Task Security Screen

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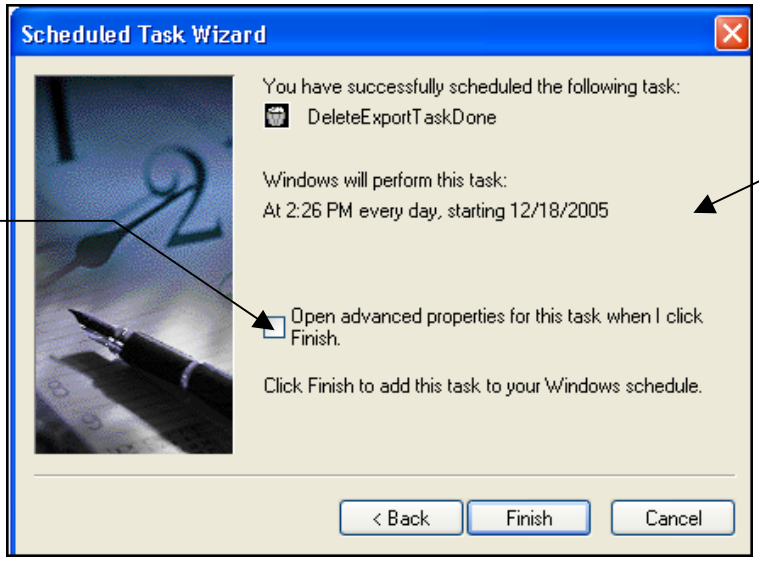
After you provide a pre-defined User ID and Password and press the screen's Next button, the Schedule Confirmation screen will summarize the schedule:



Schedule Confirmation Screen

✓ The *Schedule Confirmation* screen lists the critical elements of the schedule. However, it does ***not*** establish an essential link between the scheduled *AutoDelete* procedure and the Batch Delete file (.bdl) you set up to carry out the procedure.

To create this link, place a check in the **Open Advanced Properties** check box and press the Finish button.

The ***Advanced Properties*** dialog has four tabs. The Schedule, Settings and Security tabs contain standard Windows Scheduler settings you can use to customize your schedule and its operations, and to expand the scope of the schedule's security.

The *Task* tab, on the other hand, contains three required fields – and one required option (see the example on the next page):

Run: This field is a Command Line with:

- the name and path of the *AutoDelete* program file (.exe)
- the name and path of the AutoDelete Settings file (.ini)
- the name and path of the *AutoDelete* configuration file (.bdl) with deletion settings and Filter criteria for this schedule
- Connection Strings to the application's Admin and Engine databases (Appendix A).

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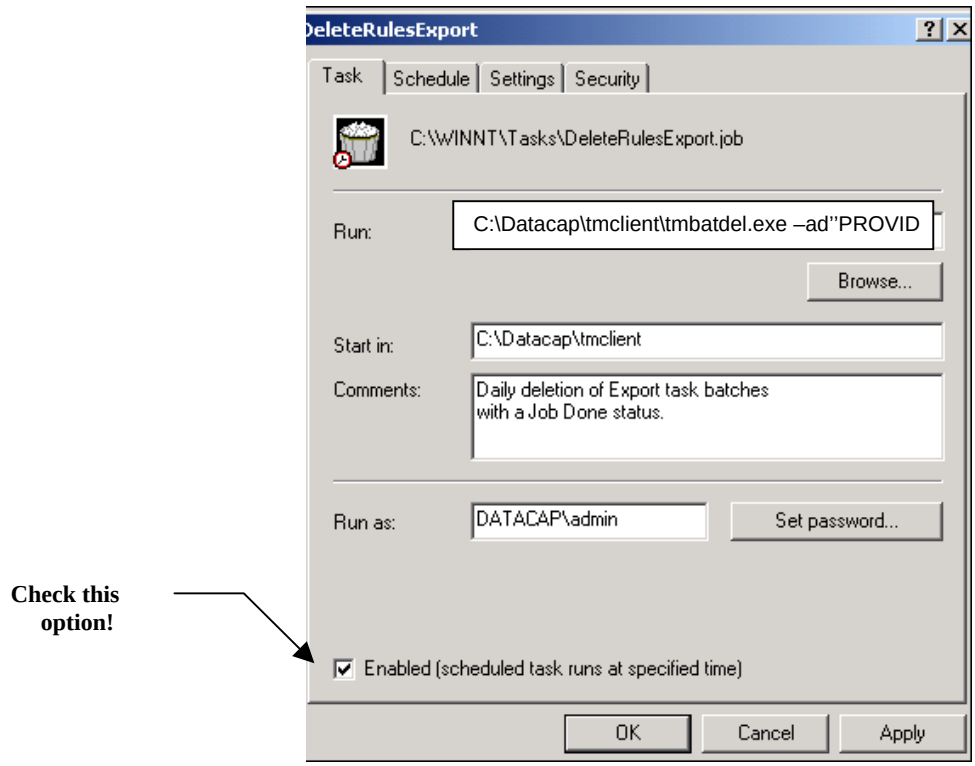
Alert: You must set up a Command Line with this syntax:

```
C:\Datacap\tmclient\tmbatdel.exe<space>-ad"PROVIDER=
MSACCESS;DSN=C:\Datacap\1040EZ\process\1040Adm.mdb;
CATALOG=;DBNTA=;"<space>-ed"PROVIDER=MSACCESS;
DSN=C:\Datacap\1040EZ\process\1040Eng.mdb;CATALOG=;DBNTA=;"
<space>-iC:\Datacap\1040ez\process\tmbatdel.ini<space>
C:\Datacap\1040EZ\process\DeleteExportTaskDone.bdl
```

Start in: This is the name and location of the folder containing *AutoDelete's* program file (.exe).

Run as: The default value is the User Name you entered in the wizard's *Task Security* screen (Page 36).

Enabled. To activate the scheduler, you ***must*** place a check in this check box.



Advanced Properties Dialog

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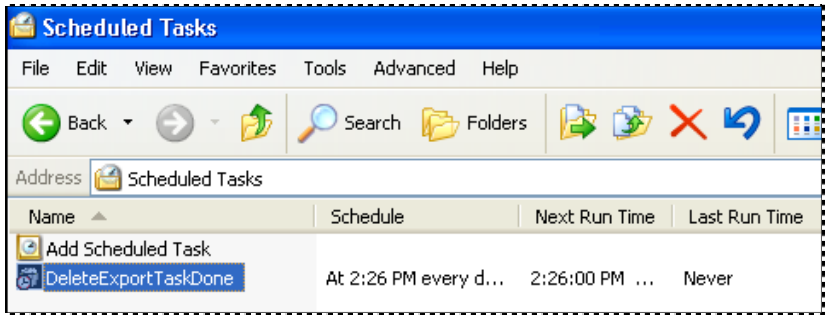
At this point, if you use Control Panel's Scheduled Tasks icon to access the Scheduled Tasks dialog, the deletion schedule will be included as one of the tasks:

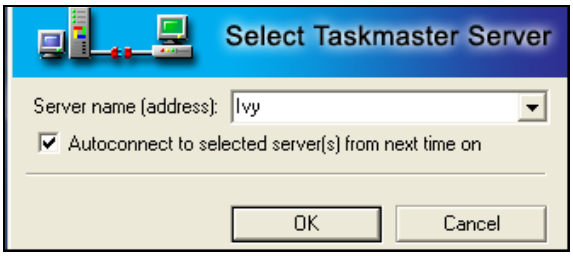


Schedule Tasks dialog

The **Windows Task Scheduler** goes into action by opening *AutoDelete* ***automatically*** and ***repeatedly*** according to the parameters of the schedule, and closes *AutoDelete* as soon as its work is over.

> In a Test environment, the ***AutoDelete Manager*** will appear when a configuration first runs. There will be a delay of 30-60 seconds before the deletion begins, and the delay will be tracked in the lower left-hand corner of the ***AutoDelete Manager*** (illustrated on Page 44).

☛ When the scheduled *AutoDelete* configuration first runs, the ***Select Taskmaster Server*** dialog will appear on your screen. Select the **Autoconnect** option and press the OK button. As a result, *AutoDelete* can carry out its first scheduled deletion. It can perform future deletions without involving you in any way. (The Autoconnect feature is turned *On* and *Off* in response to a Registry setting. For more information, consult your Datacap Solutions Provider.)



Important! You can disengage a scheduled procedure *at any time* before deletion begins, by removing the check from the **Enabled** check box in the *Task* tab of the ***Advanced Properties*** dialog.

To open this dialog at any time:

- Right-click on the applicable schedule in the Scheduled Tasks dialog.
- Select Properties from the options.

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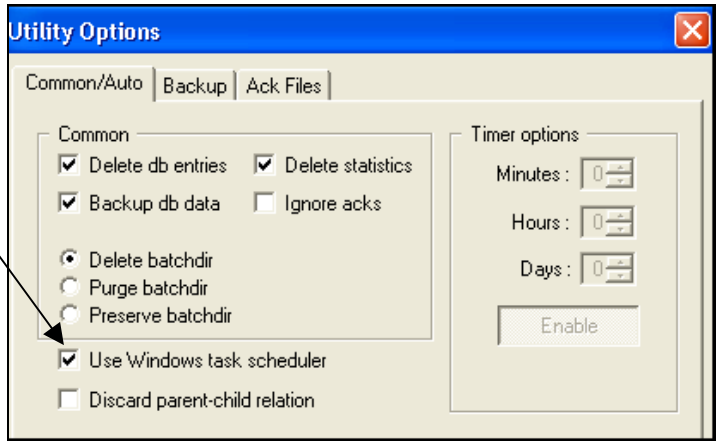
How to Setup Windows Task Scheduler: Step-by-Step

Here is a step-by-step review of procedures for setting up and using the **Windows Task Scheduler:**

Step	Action
1.	Follow the standard procedures on Page 27 to open *Taskmaster* and your application, and define an *AutoDelete* configuration.
2.	Save the configuration as a Batch Delete file (.bdl)
3.	Click on the ***AutoDelete Manager's*** **Load/Refresh** icon in to populate the **Available Selections** area with the workflow's current Job/Task/Status listings.
4.	Select the Job/Task/Status specifications that determine which batches will be deleted regularly, according to a schedule you will define. (As an example, you might choose *Rules/Export/JobDone*.)
5.	Add these specifications to the ***AutoDelete Manager's*** **Filter Selection Table**.
6.	Once you have completed the **Filter Selection Table**, click on the toolbar's **Options** icon to access the *Common/Auto* tab of the ***Options*** dialog.

Alert! **Select the Task Scheduler option!**



7.	Follow the instructions on Page 27 to specify any steps that this configuration is to take to delete records from the Engine database and to search for Acknowledgement (.ack) files.
8.	Click on the **Use Windows Task Scheduler** check box. (This is a very important step!)
9.	Click on the OK button at the bottom of the tab to return to the ***AutoDelete Manager.*** Again, save the AutoDelete Configuration file (.bdl).

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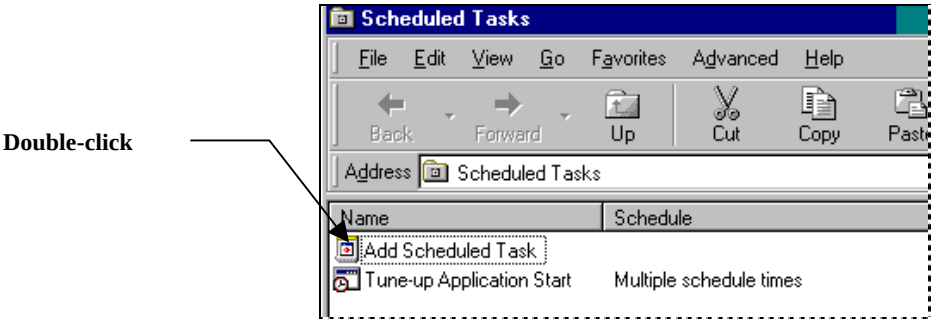
How to Use Windows Task Scheduler (continued)

Step	Action

10. Access your computer's ***Control Panel*** settings.

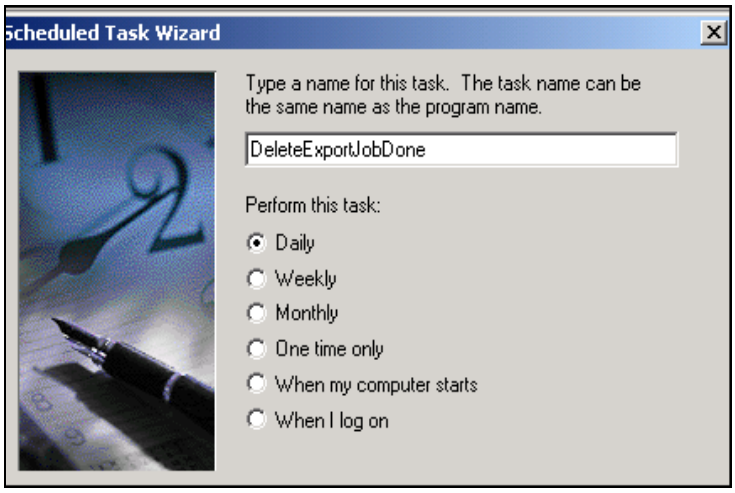
11. Double-click on the **Scheduled Tasks** icon.

12. In the ***Scheduled Tasks*** dialog, double-click on *Add Scheduled Task.*



13. When the opening screen of the ***Scheduled Task Wizard*** appears, press the Next button to access the *Scheduling Information* screen.

14. Enter a **Name** for the schedule, and select a **Timing** option:



Continued on the next page →

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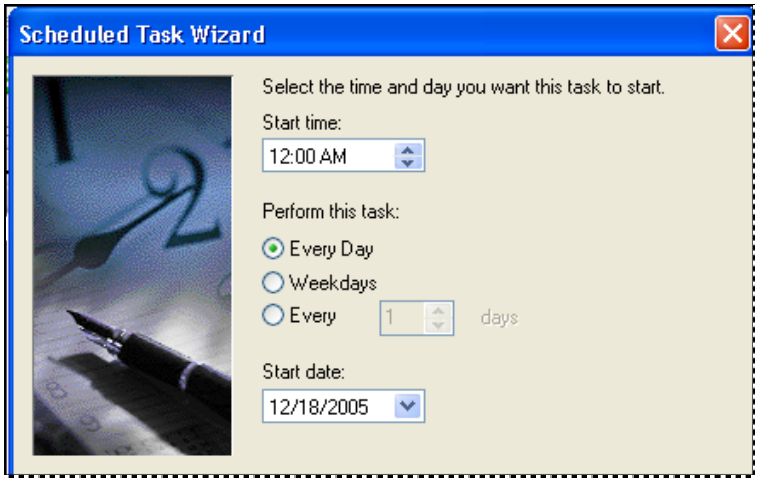
How to Use Windows Task Scheduler (continued)

Step	Action

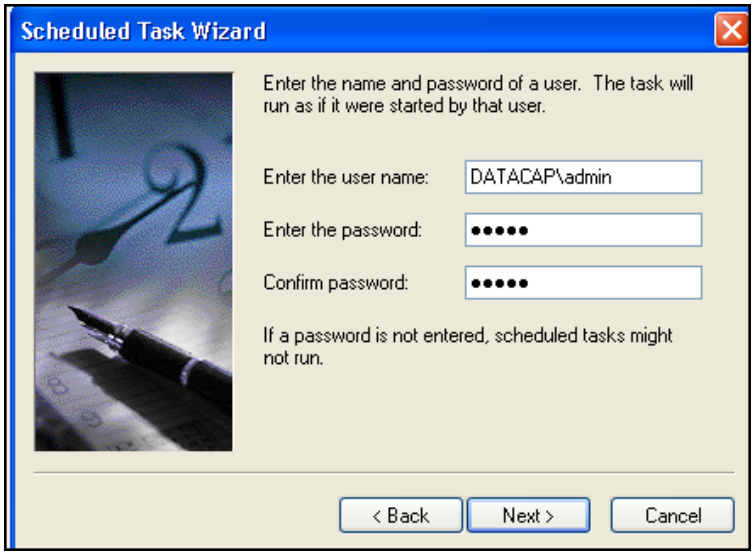
15. Click on the wizard's Next button to access the *Scheduling Detail* screen



16. Add appropriate details of this Batch Deletion schedule. ***Note:*** The content of this screen depends on your choice of a **Timing** option in the *Scheduling Information* screen.

17. Click on the Next button to access the Task Security screen.

18. Enter your User ID and Password.



19. Click on the Next button to access the *Schedule Confirmation* screen, and review the screen's data.

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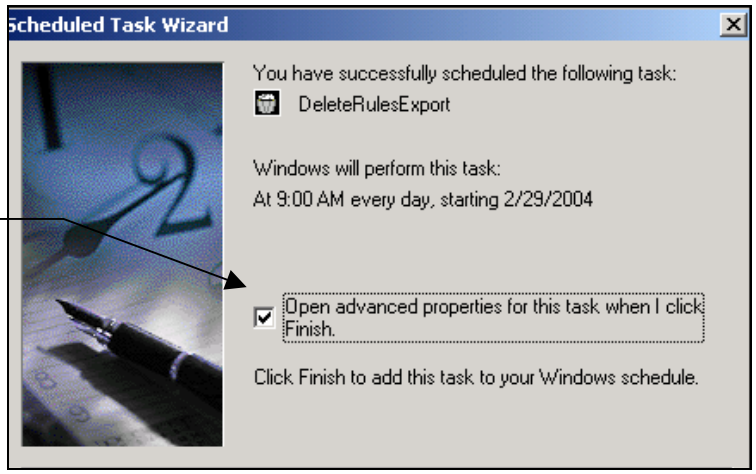
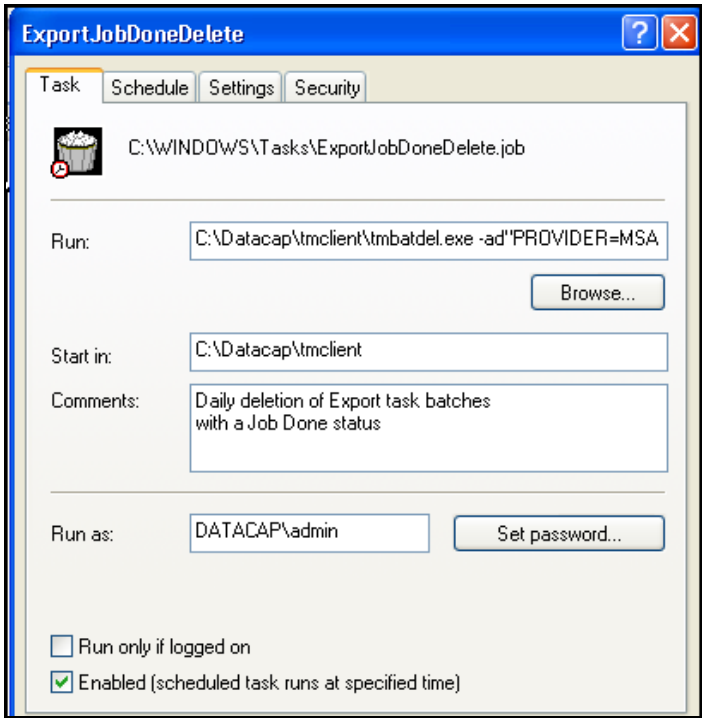
Select this option.



To Use the Windows Task Scheduler (continued)

Step	Action

20. Select the **Open Advanced Properties** option and press the Finish button: the *Task* tab of the ***Advanced Properties*** dialog will appear on your screen.



21. In the **Run** Command Line, enter values that designate: the name and path of the *AutoDelete* program file (.exe); the name and path of the *AutoDelete* Settings file (.ini); the name and path of the Batch Delete file (.bdl) containing the scheduled deletion criteria; and Connection Strings to the application's Admin and Engine databases. ***Alert!*** Be sure to follow the syntax presented on Page 38.

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To Use the Windows Task Scheduler (continued)

Step	Action

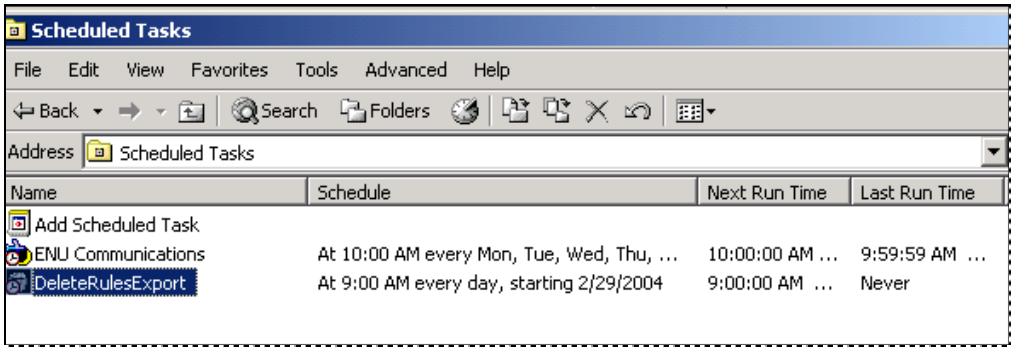
22. Use the **Start in** field to indicate the name and location of the folder containing the *AutoDelete* program file (.exe).

23. Add any **Comments** you feel might help others appreciate the scope and focus of this schedule.

24. ***Very Important!*** Select the **Enabled** check box at the bottom of the tab.

25. Use the *Schedule*, *Settings* and Security tabs to further customize the schedule: click on the OK button to complete the schedule and close the wizard.

26. Confirm a listing for the schedule in the ***Scheduled Tasks*** dialog.



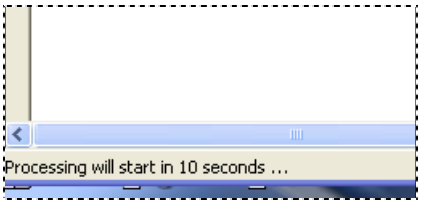
27. To review the schedule's components, right-click on the listing and select **Properties:** the *Tasks* tab of the ***Advanced Properties*** dialog will appear (illustrated on the previous page.)

28. Schedule and run a series of test deletions at brief intervals to be sure that **Windows Task Scheduler** operates correctly.

29. To de-activate the schedule, remove the check from the **Enabled** check box.

✓ When *AutoDelete* operates in response to **Windows Task Scheduler**, there will be a delay of 30-60 seconds before the deletion takes effect. This delay is monitored in the lower left-hand corner of the ***AutoDelete Manager.***

Processing notification



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Troubleshooting Windows Task Scheduler

The **Windows Task Scheduler** will not be able to run a scheduled *AutoDelete* configuration if you:

- Did not check the **Use Windows Task Scheduler** option in the *Common/Auto* tab of the ***AutoDelete Manager's Options*** dialog (Page 34).
- Did not check the **Enabled** option in the *Task* tab of the ***Advanced Properties*** dialog's *Task* tab (Page 37).
- Did not enter a complete set of Command Line values in the **Run** field of the *Task* tab of the ***Advanced Properties*** dialog's *Task* tab (Page 38). Remember to add the name and path of your AutoDelete Configuration file (.bdl).
- Did not precisely follow the syntax of the Command Line values in the **Run** field of the *Task* tab of the ***Advanced Properties*** dialog's *Task* tab (Page 38).

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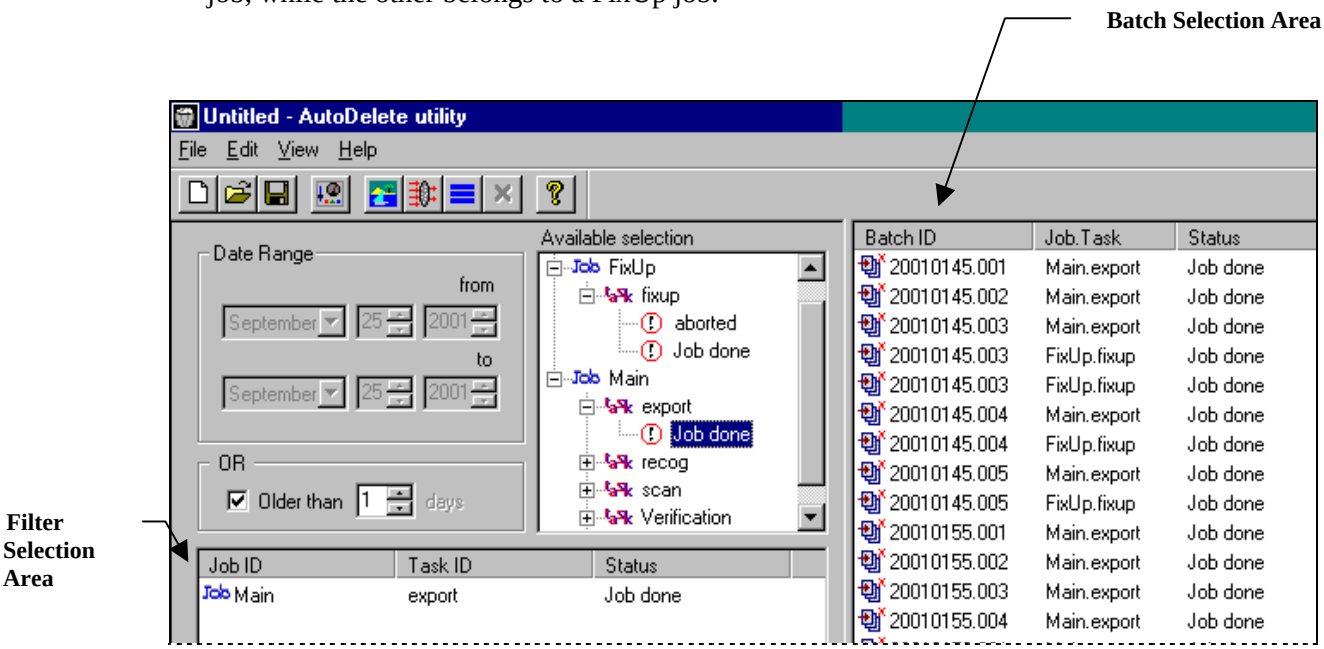
Child Jobs: Branching, and Split Batches

This section reviews filtering mechanisms that identify batches processed by a workflow's ***child*** job(s), and techniques for deleting sub-batches that have been split from an original batch.

Branching

The illustration below highlights an apparent conflict: the **Batch Selection Area** contains duplicate listings for certain batches. In each case, one listing is associated with the Main job, while the other belongs to a FixUp job.



AutoDelete Manager

Three factors have combined to create this situation:

Workflow Structure. This application's Main job consists of four tasks: Scan, Recognition, Verification and Export. If the Recognition task is unable to determine the nature of a scanned page, the task temporarily stops processing the batch – and ***branches*** it to the FixUp **child job** for review and repair. Afterwards, the FixUp job assigns a *Job Done* status to the batch and returns it to the Recognition task of the **parent job** – Main. When the batch completes the workflow, the Main job's Export task also assigns a *Job Done* status to the batch.

Filter Criteria. In the **Filter Selection Area**, the Administrator has specified batches successfully processed by the Export task of the Main job at the conclusion of its workflow.

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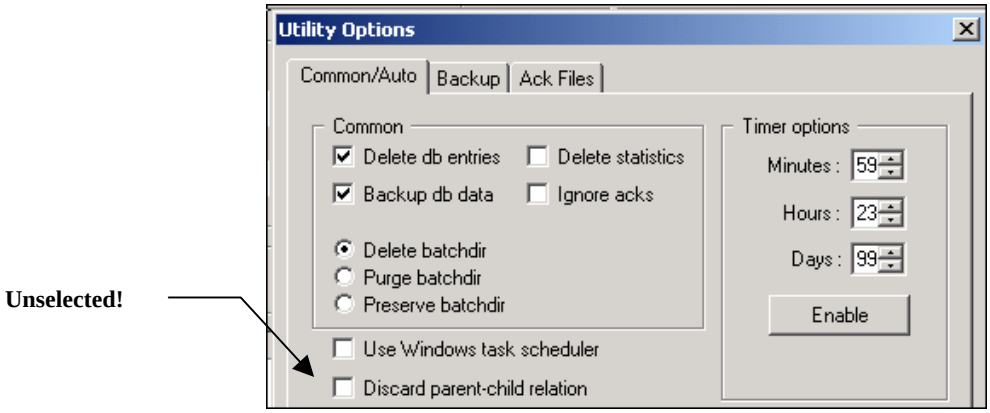
Discard Parent-Child Relation Option. This option in the *Common/Auto* tab of the ***Options*** dialog has not been selected. As a result, *AutoDelete* will generate a batch listing for the ***child*** job and tie it to a listing for the ***parent*** job – if you have included the parent job in the ***AutoDelete Manager's*** **Filter Selection Area.** ***Remember:*** if this option is selected, *AutoDelete* will display only the parent job's listings.



Options Dialog

Be Careful: If you select a batch listed according to a ***child*** job and click on the **Delete** icon, *AutoDelete* will remove the batch and its contents, according to the guidelines you have provided in the ***Options*** dialog. Both the "child job" listing and "parent job" listing will disappear from the **Batch Selection Area** of the ***AutoDelete Manager***.

However, such a step will irreversibly remove the batch from the ***parent*** job's workflow even if the batch still has a long way to go.

As a result, we ***strongly recommend*** that you do not use ***child*** job listings to delete batches and their contents.

Deleting a Split Batch

Some applications feature a "splitting" mechanism. This procedure divides a source batch into sub-batches – then processes the remains of the source batch in one way, and the sub-batches in another.

As examples, the HCFA **workflow** of the pre-configured *Taskmaster for Medical Claims* application has two jobs – HCFA Main and HCFA Demo – and each has an HC_PreValidate task (see the illustration on the next page.)

The PreValidate task assesses every document in a batch, and every page in every document. If a document and all its pages satisfy the PreValidate task's requirements, the task will

- Create a sub-batch
- Split the document from the source batch

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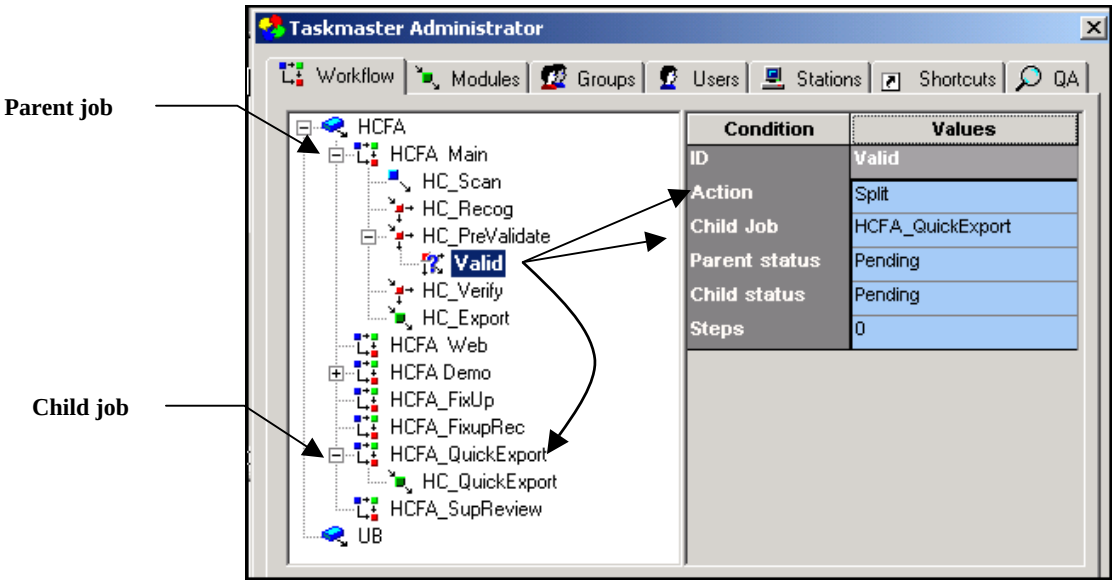
- Add the document to the sub-batch
- Add the sub-batch to the processing queue of a HCFA QExport ***child*** job, thus by-passing the Main job's Verify task.
- Re-organize the documents in the source batch for processing by the Verify task.

In this situation, HCFA Main (or HCFA Demo) is the ***parent*** job. HC_PreValidate assembles the sub-batches and forwards them to the HCFA QExport ***child*** job for processing.



Medical Claims Taskmaster Administrator – *Workflow tab*

If the HC_PreValidate task splits a batch, here is what happens - from an *AutoDelete* perspective.

There are two source batches – each with a sub-batch:

20040128.002 becomes a ***partially split*** source batch: what remains of the batch is is waiting to be processed by the Main job's HC Verify task. The batch has a *Pending* status.

20040128.002.01 has been split from the source batch and successfully processed by the QExport child job. The sub-batch has a *Job Done* status.

✓ To determine the extent of the links between a source batch and its sub-batches when deletion occurs, *AutoDelete* references the **BatchDir** check boxes on the *CommonAuto* tab of the ***Options*** dialog. To access this tab, use the toolbar icon or the **Options** item of the **Views** menu.

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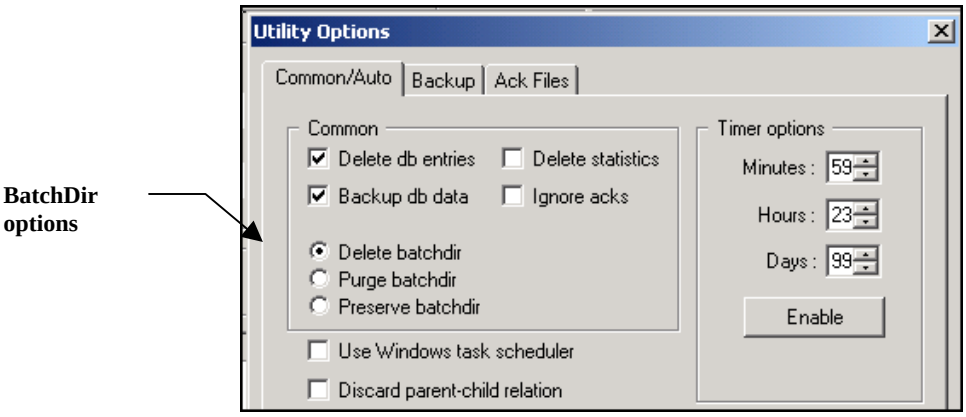

Options dialog - *Common/Auto tab*

Delete BatchDir is the default specification in this area (Page 16). When carrying out a standard deletion, *AutoDelete* removes the Batch Directory for every batch listed in the **Batch Selection Table**, and all *Taskmaster* files in that directory. In the example on the next page, if **Batch 20020255.001** appears in the table, *AutoDelete* will eliminate the batch's folder and its seven files. (Note, however, that *AutoDelete* does not touch Export files; these stay in an application's **Export Directory**.)

In contrast, if you are considering the deletion of a split batch and its resulting sub-batches, you have to also consider the role of the **Purge BatchDir** option:

If you…	AutoDelete removes…	AutoDelete leaves…
Do ***not*** select **PurgeBatchDir**	**From the source batch:** Processing files (.tif, .xml., etc) ***not*** associated with a sub-batch. Page files (.xml) Log files (.log) Settings files (.ini)	**In the source batch:** The ***source*** Batch Directory. Processing files ***linked to*** the sub-batches. **In each sub-batch:** The ***sub*** Batch Directory. Page files (..xml), Log files (.log) and Settings files (.ini)

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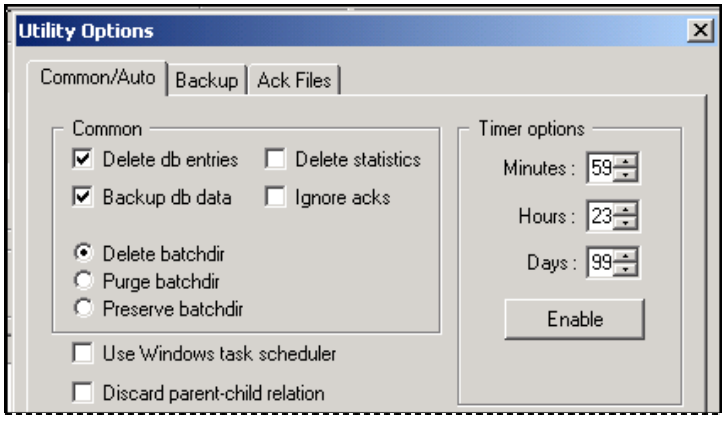
On the other hand…

If you…	AutoDelete removes…	AutoDelete leaves…
Select **PurgeBatchDir**	**From the source batch:** Batch Directory All files **From each sub-batch:** Sub Batch Directory All files	Nothing

✓ Keep in mind these important results as you prepare to delete split batches and their sub-batches:

- Selecting a source batch and activating the **PurgeBatchDir** option removes the source Batch Directory, all sub Batch Directories, and all files in these directories.
- To delete a sub-batch only, be sure to activate the **PurgeBatchDir** option before you delete the sub-batch.
- To delete a source batch while leaving its sub-batches intact, be sure that you do ***not*** activate the **PurgeBatchDir** option when you select the source batch.



Options Dialog

The **PurgeBatchDir** option also governs *AutoDelete's* handling of *custom* batches – batches with one or more files from locations outside of an application's workflow.

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When you are deleting custom batches:

If you…	AutoDelete removes…	AutoDelete leaves…
Do ***not*** select **PurgeBatchDir**	Standard processing files (.tif, .xml, etc) Page files (.xml) Log files (.log) Settings files (.ini)	Batch Directory Custom files
Select **PurgeBatchDir**	Batch Directory All files	Nothing

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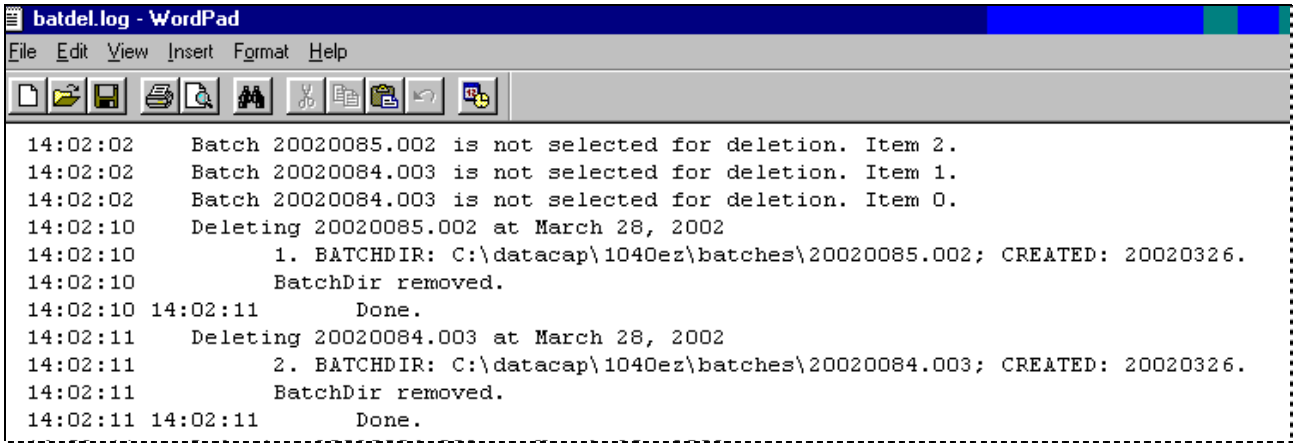
Log Files

Log files generated by *AutoDelete* (Page 24) take a form similar to the example below:



Batch Delete Log—*After Deletion*

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