

# Glossary

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## Taskmaster Administrator's Guide

This *Glossary* contains brief definitions of terms associated with *Taskmaster*.

### Action

A concise procedure that is part of a rule. Together, a rule's actions determine how a particular *rules-based* task is to deal with a specific object of the Document Hierarchy...a particular page or field, for example.

An action belongs to a RuleSet Type such as Locate, Recognition, Validate, or Export. (These are just a few of the RuleSet Types.)

The setup phase of the Task Definition process uses *Batch Pilot's Setup* dialog to assign RuleSet Types to a task. *See also: Action, Rules, RuleSet Type, Task Definitions.*

### Actions Library

The combination of action categories that is available to rules of a specific RuleSet Type. Actions that belong to a particular category – Locate actions, for example – are part of a Rule Runner Actions file (.rra). A RuleSet Actions Library contains one or more files. *See also: Action, Rules, RuleSet Type,*

### Admin Database

The *Taskmaster* database that contains definitions of workflows, jobs, tasks, users and workstations. *See also: Engine Database, LookUp Database, Rules Database, Taskmaster.*

### Administrative Privileges

Attributes of a User Definition or User Group Definition that designate the ability of an individual or members of a User Group to access an application's administrative dialogs and data, and carry out administrative functions. *See also: User Definition, Job/Task Permissions.*

### Application

The principal organizing entity of a *Taskmaster* configuration. An application's Document Hierarchy identifies *structural* objects at four levels: **Batch**, **Document**, **Page** and **Field**. A Workflow Hierarchy organizes the application's *processing* entities at three levels: Workflow, Job and Task. *See also: Document Hierarchy, Workflow Hierarchy.*

The application includes four principal databases (Admin, Engine, Rules and LookUp); at least one *Data Entry* panel for Verification tasks; a *Rule Manager*; and a *Report Viewer*.

### Application Wizard

A wizard that can assemble an entirely new *Taskmaster* application, or duplicate an existing application. The *Taskmaster Application Wizard Guide* explains the wizard's screens and procedures.

### AutoDelete

A *Taskmaster* utility that deletes an application's batches on an *ad hoc* or *scheduled* basis, according to deletion criteria provided by the application's administrator.

### Autoform

The *Batch Pilot* utility that uses the **Field** objects of a Document Hierarchy to automatically assemble the *runtime* form of a Verification Task Project. This form serves as the Verification task's *Data Entry* panel. *See also: Runtime Form.*

### Batch

A *Taskmaster* application's processing container and the organizing object at the top of its Document Hierarchy. *See also: Application, Document Hierarchy.*

### Batch Pilot

The environment in which tasks are designed, developed and run. This environment constructs a task's *setup* and *runtime* forms, binds them to a Task Project, and adds settings that link the Task Project to a Task Definition prepared by *Taskmaster*. *See also: Task Project, Task Settings, Task Definition, Task Project.*

### Batch Pilot Window

Batch Pilot's fully-equipped window - used for form design, Task Project definition, scripting, and task and utility operations.

### Binding

*Batch Pilot's* design mechanism that links a Task Project's *Setup* and *Runtime* forms to specific objects of an application's Document Hierarchy. *See also: Document Hierarchy, Runtime Form, Setup Form.*

**Binding** also refers to the *Rule Manager* procedure that assigns rules of a specific RuleSet Type to an object of the application's Document Hierarchy. *See also: Document Hierarchy, Rule Manager.*

## Character

A distinct, separate object of a word detected on the processing file of a *source* page. During processing, a *RuleRunner* task attempts to recognize a value's characters – and often assigns a Confidence Rating to indicate its success (or lack of success!) *See also: Confidence Level, RuleRunner Task.*

## Client

*See Taskmaster Client.*

## Confidence Level

A value between “0” and “9” stipulating a minimum degree of certainty on the part of a “recognition” task that it has accurately interpreted data in a particular field of a *source* page, or has accurately recognized the page itself. The Required Confidence Levels for a page and its fields are defined in the task's Task Definition. “0” is the least stringent rating, while “9” means that the task will accept a field's value only if it has interpreted the value with complete confidence. *See also: Field, RuleRunner Task, Source Page, Task Definition.*

## Connection String

A value that links a shortcut icon and other components of an application to to application's databases. This value is a property of the linked component. *See also: Data Source Name.*

## Data Source Name (DSN)

Specifications defining the link between a specific data **source**—usually a database such as an application's Engine, Admin, Rules or LookUp database—and an **Open Database Connectivity (ODBC)** “driver.” In Taskmaster 6.2 and Taskmaster 6.5, Connection Strings replace most Data Source Names. *See also: Connection String.*

## Data Edit Field

An interactive field in a *Data Entry* panel. This field displays the *recognized* value for a **Field** object of a Document Hierarchy; the accompanying **Snippet** shows the *image* of the field and its value; and a **Label** identifies the field.

After comparing the two values, a Data Entry operator can make appropriate changes to the value in the Data Edit field.

The *Autoform* utility automatically generates a *Data Entry* panel with a field trio – Snippet, Data Edit field and Label – for each **Field** object of the Document Hierarchy. *See also: Autoform, Data Entry Panel, Label, Snippet.*

### Data Entry Panel

A *runtime* form which presents the Verification task's operator with information taken from certain fields of a *recognized* page. For most fields, the information appears in two formats: a Snippet shows the image of the source field and any value it contains; an interactive Data Edit field displays the field's recognized value *See also: Autoform*.

### Data File (.xml)

A file containing the *recognized* values of a *source* page. After a "recognition" task fully processes a *source* page, the task adds these values to a Data file it assembles just for that page. If the succeeding Verification task alters a value, the task updates the Data file – and Export tasks access the files to create an Export file or update an Export database. *See also: Page file, Source Page*.

### DCO

An acronym for the **Datacap Object**.

Properties and methods of this object are responsible for the definition of an application's Document Hierarchy; the application of rules to specific objects of the Document Hierarchy; and for the ways in which the rules are carried out after they have been assigned to tasks of a *Taskmaster* workflow. *See also: Objects, Document Hierarchy, Rules*.

### Document

An object on the second level of an application's Document Hierarchy. A **Document** object consists of one or more **Page** objects, and is the primary organizing element of the hierarchy's top-level **Batch** object. Page files (.xml) generated by each task identify the documents in the current batch, and the pages in each document. *See also: Batch, Page File, Document Hierarchy, Page, Page Type*,

### Document Integrity

Settings of the Document Hierarchy that determine the makeup of the documents in a batch, in terms of the *number* and *type* of pages a document must contain. *See also: Document, Document Hierarchy, Page*.

### Engine Database

The *Taskmaster* database containing processing results according to task, batch, document and page. *See also: Admin Database, Rules Database, LookUp Database*.

### Field

An object at the lowest level of an application's Document Hierarchy...and a child of a **Page** object one level above.

Fields on a *source* page contain values that are recognized by a RuleRunner task, s a *See also: Document Hierarchy, Page.*

## **File Server**

The server on which the files of a **Datacap** configuration reside. Phase 1 of the Installation process copies these files from the Installation CD-ROM to the File Server. The files include *Batch Pilot* software and pre-defined forms. *See also: Forms.*

## **Filter**

Optional settings in the *Filter* tab of a Task Project's **Task Settings** dialog. You can use these settings to limit the scope of a task's processing activity to batches, documents and pages which meet the filter's selection criteria.

## **Fingerprint**

A file that has the details of a *source* page's image; information about each field on the image; and other criteria that help a recognition task match pages in a batch to the fingerprint. If a match occurs, the task assigns the fingerprint's parameters to the current page.

## **FormSpec**

A file (.fs) containing detailed properties of an application's documents, pages and fields. For *Taskmaster 5.0* (and earlier) releases, a FormSpec provides an application's defining structure. Applications of releases after *Taskmaster 6.2* use a Document Hierarchy. *See also: Document Hierarchy.*

## **Full Page Recognition Rule**

A rule with a broad-based action that directs a *RuleRunner* task to recognize values in all fields of the current *source* page.

## **Group**

*See User Group.*

## **High Confidence Value**

A value in a field of a scanned page which a *RuleRunner* task interprets with a degree of certainty that equals or exceeds the application's requirements.

## **Hot Keys**

Unique keyboard combinations that an operator can use to navigate from field-to-field inside a Data Entry panel - or from page to page, document to document, or batch to batch.

### Image Enhancement

A *Rule Manager* process that enhances the image of a new fingerprint, according to specifications you provide. *See also: Fingerprint*

### Image File

An electronic representation a scanned page. The Image file is a digital picture of the actual page, usually stored as a .tif file.

### Job

A set of interrelated *Taskmaster* tasks that operate together to accomplish a specific goal. Usually, the purpose of a job is to convert paper documents to captured data. Some special purpose jobs – a FixUp job, for example – handle problems with unsatisfactory images or document content. A job is an component of a workflow. *See also: Workflow Hierarchy, Job, Task.*

### Job Monitor

A processing dialog with a Batch Information Table that displays details about every batch that is waiting to be processed by a Job/Task Combination, and about batches that have been fully processed.

### Job/Task Combination

The workflow's *fundamental processing unit*, forged by the assignment of a specific task to a specific job when workflows, jobs and tasks are defined. *See also: Workflow, Job, Task.*

### Job-Task Shortcut

An icon in *Taskmaster's Operations* window that initiates one or more Job/Task combinations. A shortcut is an element of Application Security: it is available *only* to authorized operators, Supervisors and Administrators working from a station with comparable Job-Task permissions. *See also: Job-Task Permissions.*

### Job-Task Permissions

Authorizations giving individuals (users) permission to carry out certain Job/Task Combinations. An application's Security Program includes these authorizations in its User, User Group, Station and Job-Task Shortcut Definitions. *See also: Job/Task Combination, Administrative Privileges.*

### Log File

A file that tracks a task's progress as it processes a batch. The *Log* tab of a Task Project's *Task Settings* dialog contains Log criteria.

## LookUp Database

An application's Validation database. Verification procedures compare the *recognized* values for certain fields of a *source* page to standard values in tables of the LookUp database – and report any discrepancies. *See also: Admin Database, Engine Database, Rules Database.*

## Main Job

A workflow's primary job, usually consisting of tasks in at least four broad categories: Scan, Recognition, Verification and Export. *See also: Task Definitions.*

## Objects

Elements at the four levels of an application's Document Hierarchy: **Batch**, **Workflow**, **Document**, **Page** and **Field**. Task Development process assigns properties to objects, bind a Task Project's forms to objects, and applies rules to these objects. *See also: Document Hierarchy.*

## Operator

An individual authorized by an application's Administrator to run one more tasks: Scan and Verification tasks usually require direct operator participation. Application Security procedures require a unique User ID and Password for each operator, and formal permission to carry out a specific Job/Task combination. *See also: Job/Task Combinations, Job-Task Permissions.*

## Page

An object on the third level of an application's Document Hierarchy. A **Page** object is an element of a **Document** object one level above, and contains **Field** objects one level below. *See also: Document Hierarchy.*

## Page File (.xml)

A file generated by a task as it processes a batch. The Page file file (<task>.xml) contains identifying codes and processing statistics about the batch, and about the documents and pages the batch contains. After a task has finished with a batch and assembled the file, the next task in the current job refers to it for processing benchmarks. *See also: Data File, Job, Task.*

## Page Type

The unique identifying property of a **Page** object of the Document Hierarchy. A **Document** object must include one or more **Page** objects – each with its own Page Type value.

### Panel

See *Data Entry Panel*.

### Permissions

See *Job-Task Permissions*

### Privileges

See *Administrative Privileges*.

### Processing File

A file that contains processing information about the current *source* page. This information identifies the page according to its type; the identity of its Fingerprint Class and fingerprint; the locations of its fields; and preliminary recognized values of these fields. See also: *Source Page*.

### Project

See *Task Project*.

### Recognition Engine

Software that a “recognition” task uses to read and interpret the values in the fields of a *source* page. Usually, an application uses different engines to read machine-printed and hand-printed text, and to “vote” on values in certain fields.

### Recognition Options

Special *Rule Manager* settings that are assigned to individual zoned fields of a fingerprint. These settings adjust and augment the steps a *RuleRunner* task takes to recognize values in any *source* page that matches the fingerprint.

### Recognition Task

The task of a workflow’s Main job that is responsible for identifying pages according to their Page Types; for locating, reading, interpreting and assessing data in the fields of a *source* page; and for adding the data and the assessments of the data’s clarity to a Data file for that page. To carry out its work, the task applies rules of various kinds to the *source* page and its fields. Often, the task is termed a *RuleRunner* task.

### Recognized Value

The *interpreted* value of a word on a *source* page.



## Report Viewer

The *Taskmaster* utility that generates summary and detail reports on a task's activities and results.

## Rule

A set of instructions that determine how a task is to carry out a narrowly defined activity involving a single object of the Document Hierarchy.

A rule consists of one or more actions.

Rules are categorized according to their RuleSet Type: **Locate** rules, for example, find fields and their values; **Export** rules extract values from a Data file and add them to an Export file or database. Multiple rules of the same type that present alternative ways to deal with the same object form a RuleSet. *See also: Action, RuleSet, RuleSet Type.*

## Rule Manager

Development technology responsible for definitions of an application's Document Hierarchy, fingerprints, rules, RuleSets and RuleSet Types. *Rule Manager* activities take place within the *Rule Manager Window* - a product of the *Batch Pilot* workshop.

## Rules Database

A database with complete information about an application's rules, actions and RuleSets – and their association with individual objects of the Document Hierarchy. *See also: Actions, Rules, RuleSets, Document Hierarchy.*

## RuleRunner Task

Any task that is guided primarily by the actions of one or more rules – and by the actions of those rules. VScan, PageID, Recognize and Export are examples of *RuleRunner* tasks.

## RuleSet

A group of rules of the same RuleSet Type that apply to same object of the Document Hierarchy. As an example, the **Locate** rules that look for the **Date** field on a *source* page belong to the same RuleSet. *See also: RuleSet Type, Source Page.*

## RuleSet Type

A category that defines the purpose of a particular RuleSet.

## Runtime Form

A form associated with a particular task's operations. Background tasks such as *RuleRunner* and *Export* use similar *runtime* forms that display information but do not require operator involvement. In contrast, a Verify task's *Data Entry* panel is an example

of a *runtime* form that differs from application to application, and demands an operator's attention. *See also: Setup Form*

### Security

Procedures that define and govern the access of individuals and workstations to an application's databases, jobs and tasks; and limit an individual's involvement in administrative activities. *See also: Administrative Privileges, Job-Task Permissions.*

### Shortcut

- 1.) An icon in the Taskmaster Client's *Operations* window that launches one or more Job/Task Combinations. A shortcut is inactive until a formal Shortcut Definition gives it specific Job-Task Permissions.
- 2.) An icon that opens a Taskmaster entity such as Taskmaster Client or Taskmaster Server Service.

*See Job-Task Shortcut.*

### Source Page

The **Page** object of the Document Hierarchy with **Field** objects. Rules associated with the **Field** objects of a *source* page determine how the workflow recognizes, extracts, verifies and validates the fields' values – and exports the values to a file or database. *See also: Page, Document Hierarchy.*

### Station

The workstation from which a user – an Operator, Supervisor or Administrator – launches a task. A station cannot participate without a formal Station Definition that provides it with a Station ID – and gives it permission to carry out specific Job/Task Combinations. A *Taskmaster Web* configuration can employ remote stations. *See also: Job/Task Combination, Job-Task Permissions, Security, User.*

### Task

The processing object of a Workflow Hierarchy. A task must be part of a job; a job must be part of a workflow. The task's identity is defined in *Taskmaster* when it is added to the Workflow Hierarchy. However, a *rules-based* task that is a product of the *Batch Pilot* workshop requires setup specifications and detailed settings from the underlying Task Project. *See also: Task Project, Workflow Hierarchy.*

### Task Definition

A *Taskmaster* process that defines a processing task as an object of a Workflow Hierarchy made up of a workflow, its jobs and the jobs' tasks. When a Task Definition incorporates the forms and settings of a *Batch Pilot* Task Project, a Task Module links the task to the project...and *Taskmaster* to *Batch Pilot*. *See also: Task Module, Task Project.*

## Taskmaster

The administrative engine of an application. *Taskmaster* defines and manages the workflow—beginning with the physical scanning of a page, and ending when the values in the fields of a *source* page have been verified and exported. *See also: Source Page*

## Taskmaster Administrator

A secondary window of the *Taskmaster Window*, used to define an application's Workflow Hierarchy and Security Program.

## Taskmaster Application Wizard

*See Application Wizard.*

## Taskmaster Client

The object of the *Taskmaster* configuration responsible for initiating and monitoring a job's tasks. Taskmaster Clients access the application's databases and supporting files through a Taskmaster Server. The application's Security Program defines the scope of a client's activity: Administrative clients can carry out a full range of tasks and supplementary procedures. *See also: Taskmaster Server, Databases.*

## Taskmaster Application Wizard

*See: Application Wizard*

## Task Module

The *required* attribute of a Task Definition that links *Taskmaster* to *Batch Pilot* - and the Task Definition to a Task Project (.bpp). The Task Module also determines if a task can create new batches, or route batches to "child" jobs. *See also: Task Definition, Task Project.*

## Taskmaster Server

The service that links Taskmaster Clients to the **Datacap Taskmaster** configuration's File Server, and to individual applications and utilities.

## Taskmaster Web

A processing environment that uses a Taskmaster Web Site to link remote Taskmaster Web Clients to an application's administrative and operating functions.

## Task Project

The structure that is the foundation for a task. A typical Task Project consists of two Datacap forms (.dcf) – a *Setup* form and a *Runtime* form – and specifications of the project's *Task Settings* dialog. *Taskmaster's* Task Definition procedures use the *Setup*

form to assign administrative and operating parameters to a task; when the task runs, the project's *Runtime* form serves as the user interface.

Task Projects are retained as **Batch Pilot Project** files (.bpp). The construction of a new Task Project *requires* an affiliation with an existing Document Hierarchy (.xml). *See also: Document Hierarchy, Runtime Form, Setup Form, Task Settings.*

### Task Settings

Attributes of a Task Project specified in the tabs of the project's *Task Settings* dialog. Settings in the *General* tab identify the project's Document Hierarchy file (.xml) – and designate the *Task Module* settings to determine where batches will be stored if the project is the basis for “batch creation” tasks, and the conditions a task might encounter in the case of “job router” tasks.

*Filter* settings intentionally limit the scope of a task's operations. *Log* settings determine the content (if any) of a task's Log files, while *Statistic* settings govern whether or not the task will contribute to **Statistics** tables of the Engine database. *See also: Task Modules, Task Project.*

### .tif File

*See Image File.*

### User

1. An individual who fills out the fields of a paper copy of a form.
2. An individual who has access to one or more objects of an application and its databases. The application's Security Program provides each user with a User ID and Password, and specify the limits of a user's processing and database access “privileges.”

*See also: Form-Filler, Security, User Group.*

### User Group

Multiple users who share Job-Task Permissions and Administrative Privileges. *See also: User.*

### Validation

The process of making sure that a field's value meets specified criteria. For example, the criteria for a field might be that the field can only contain a number within a range of numbers. The process is governed by **Validate** rules that apply to specific **Field** objects of the Document Hierarchy, and are called by a job's RuleRunner and Verification tasks. *See also: LookUp Database.*

## Variable

A *runtime* property assigned to an object of the Document Hierarchy...to a **Batch**, **Document**, **Page** or **Field** object. Individual actions assign values to a variable; other actions access these values. *See also: Document Hierarchy.*

## Verification Task

A core task of a Main job. This operator-intensive task retrieves information from the Image and Data files of a “problem” page and displays it in the fields of the application’s *Data Entry* panel. After review by the operator, the task moves to the next problem page until the batch is verified. *See also: Data Entry Panel.*

## Workflow

The top level of an application’s Workflow Hierarchy. A job, the tasks assigned to the job, any child jobs that branch from the job, and the tasks of these child jobs. In the *Batch Pilot* environment, a Document Hierarchy is an essential property of a workflow. *See also: Document Hierarchy, Job, Task, Workflow Hierarchy.*

## Workflow Hierarchy

The formal structure an application employs to retrieve, interpret, verify and store the data on a scanned page. A Workflow Hierarchy has three tiers. At the top is the workflow itself, which focuses on a particular form or operates within a particular environment. Jobs are objects of a workflow and occupy the second tier: a workflow usually has a Main job, and may have child jobs to handle special functions. Tasks are objects of a job, and are on the hierarchy’s third tier. *See also: Job, Task, Workflow.*

## Workstation

*See Station.*