

Table of Contents

Taskmaster Administrator's Guide

1.....	1-1
Welcome.....	1-1
Introducing the Datacap Taskmaster 7 CD-ROM	1-4
Typographic and Terminology Conventions.....	1-8
If You Need Help	1-10
About this Book	1-11
2.....	2-1
Taskmaster Architecture.....	2-1
Datacap Taskmaster - Overview	2-2
Datacap Studio and Taskmaster Client.....	2-4
Document Hierarchies	2-6
Rulesets and Rules	2-8
Task Profiles.....	2-10
Fingerprints.....	2-11
Workflows	2-13
3.....	3-1
Datacap Taskmaster Installation.....	3-1

4..... 4-1

Taskmaster Applications..... 4-1

- Introduction to the Taskmaster Rulerunner Service Application..... 4-2
- How to Access an Application..... 4-4
- The Document Hierarchy 4-6
 - Anatomy of an Object..... 4-7
- Fingerprints 4-9
- Rulesets and Rules 4-12
- Workflow Operations 4-14
- Changes in Taskmaster Applications..... 4-16
 - Rules Database..... 4-16
 - Actions (XML)..... 4-16

5..... 5-1

Application Security 5-1

- Taskmaster Security—Introduction 5-2
 - User Security..... 5-4
 - User Passwords 5-7
 - User Qualifications: Privileges, Permissions and Group Assignments..... 5-8
 - Administrative Privileges..... 5-8
 - User Qualifications: Job-Task Permissions 5-13
 - User Definitions: User Group Affiliations 5-16
 - How to Define a User: Step-by-Step..... 5-17
- User Groups 5-20
 - User Group Qualifications: Privileges and Permissions 5-20
 - Fields and Functions of the Groups Tab..... 5-23
 - How to Define a User Group..... 5-24
 - LDAP Group Authentication 5-26
- Station Security 5-27
 - Overview 5-27
 - Fields and Functions of the Stations Tab..... 5-28
 - Virtual Stations..... 5-29
 - How to Construct a New Station Definition 5-31
- Job-Task Shortcuts 5-32
 - Overview 5-32
 - Fields and Functions of the Shortcuts Tab 5-34
 - How to Define a New Job/Task Shortcut 5-37
 - Shortcut Properties 5-39

6..... 6-1

Report Viewer 6-1

- Introduction..... 6-3
 - Report Viewer's Structure 6-4
 - Signing On 6-6
- Report Viewer Window..... 6-8
 - Features of the Report Viewer Window 6-9
 - Features of the Preview Window 6-10
 - Navigation Pane..... 6-12

Text Search.....	6-12
Setting up Report Viewer	6-13
Application Settings and RptView.ini.....	6-13
Additional Settings: rptview.ini	6-16
Shortcuts Icons	6-17
How to Set Up a New Report Viewer: Step-by-Step.....	6-18
Standard Reports: the Report Manager	6-20
Properties of a Standard Report	6-21
Report Settings Dialog	6-22
Background Tasks Reports – a First Look.....	6-23
Generating Reports without Filters.....	6-27
Open Report Dialog.....	6-28
How to Generate a Report without a Filter: Step-by-Step.....	6-30
Freeze Pane and Other Tools.....	6-32
Printing Reports.....	6-33
Printing - Phase 1: Printer Selection and Setup.....	6-33
Printing - Phase 2: Printing	6-34
Report Filters	6-35
How to Define a Report Filter	6-36
Background Tasks Reports.....	6-40
Selection Parameters: Batch Page and Batch Document Counts	6-42
Verify and Verify Summary Reports.....	6-44
FixUp and FixUp Summary Reports	6-45
Modality Parameters	6-46
Batch Aging and Batch Productivity Reports	6-48
Workflow Audit Report (Taskmaster Web).....	6-50
How to Generate a Report with a Filter.....	6-51
Defining a New Report	6-52
Scheduling Reports	6-54
Schedule Dialog	6-55
How to Define a Report Production Schedule	6-56
Processing Scheduled Reports.....	6-57
Report Content	6-58
Background Tasks Reports.....	6-59
Batch Aging Report	6-60
Batch Productivity Report.....	6-61
FixUp Reports	6-61
FixUp Summary Reports.....	6-62
Scan Reports.....	6-62
Scan Summary Report.....	6-63
Verify Reports.....	6-63
Verify Summary Report.....	6-64
Workflow Audit Report.....	6-64
Reports Glossary.....	6-66
Troubleshooting Report Viewer.....	6-81

7..... 7-1

AutoDelete..... 7-1

Introduction.....	7-2
Installation and Setup	7-4

- To Setup AutoDelete 7-4
- AutoDelete Configurations 7-8
 - The AutoDelete Manager 7-9
 - Menus of the AutoDelete Manager 7-9
 - Toolbar 7-12
 - Fields and Functions of the AutoDelete Manager 7-14
 - Features of the Options Dialog 7-16
 - Common/Auto Tab 7-16
 - Backup Tab 7-19
 - Ack Files Tab 7-21
 - AutoDelete Logs 7-24
- Defining and Running *AutoDelete* Configurations 7-26
 - Manual Configurations 7-27
 - Automatic Configurations 7-32
 - AutoDelete Timer 7-32
 - Windows Task Scheduler 7-34
 - How to Setup Windows Task Scheduler: Step-by-Step 7-40
 - Troubleshooting Windows Task Scheduler 7-45
- Child Jobs: Branching, and Split Batches 7-46
 - Branching 7-46
 - Deleting a Split Batch 7-47
- Log Files 7-52

- 8 8-1**
- Additional Topics 8-1**
 - Batch Numbering: Alternative Formats 8-2
 - To Install an Alternative Batch ID Format 8-6

Appendix A: Connection String Syntax

Glossary

Index