

Table of Contents

Guide to Taskmaster Rules

1.....	1-1
Introduction to Taskmaster Rules.....	1-1
What is...Taskmaster Rules?.....	1-2
What is a Taskmaster Rules Application?.....	1-5
Elements of a Taskmaster Rules Application	1-5
Configuration Elements.....	1-5
Operating Elements	1-8
How to Access a Pre-Configured Application	1-10
Typographic and Terminology Conventions.....	1-12
If You Need Help	1-13
About this Book	1-14
Related Documentation.....	1-17
2.....	2-1
Overview of the Taskmaster Application.....	2-1
Introduction.....	2-2
Document Hierarchy.....	2-3
Rule Manager and the Document Hierarchy	2-6
RuleSet Hierarchies.....	2-7
Workflow Hierarchies.....	2-11
Application Data	2-14
Page Files	2-15
Data Files	2-17
Pre-Configured Applications.....	2-18
Application Shortcuts.....	2-18
Application Folders and Files	2-19
Files of the Application's Process Directory.....	2-20
Components of the Pre-Configured 1040EZ Application	2-21
New Applications	2-22
The Taskmaster Application Wizard	2-22
3.....	3-1
Document Hierarchies.....	3-1
Introduction.....	3-2
How to Access the 1040EZ Training Application	3-6
Document Hierarchy Setup Window	3-7
How to Access the Document Hierarchy Setup Window	3-7

Menus of the Document Hierarchy Setup Window	3-9
File Menu	3-9
Edit Menu	3-10
Objects Menu	3-11
Properties Menu	3-12
Help Menu	3-14
How to Construct a Document Hierarchy	3-15
How to Add Objects to a Document Hierarchy	3-16
Definition #1: Batch Object	3-17
Default Properties of the Batch Object	3-18
Additional Default Properties	3-20
Definition #2: Document Objects	3-21
Default Properties of a Document Object	3-23
Definition #3: Page Objects	3-24
Default Properties of a Page Object	3-25
Definition #4: Field Objects	3-26
Default Properties of a Field Object	3-29
How to Add, Remove and Modify Properties	3-31
How to Change a Property's Value	3-31
How to Add a Property to an Object of the Document Hierarchy	3-32
How to Delete a Custom Property	3-34
Dictionaries	3-35
Lookup Databases	3-40
4	4-1
Fingerprints, Zones and Recognition Options	4-1
Introduction	4-2
How to Add a Fingerprint	4-4
Fingerprint Classes	4-4
Fingerprints	4-6
How to Define a Fingerprint	4-7
Fingerprint Page Types	4-10
Image Enhancement	4-11
Enhancing Existing Fingerprint Images	4-13
Zones	4-14
Zoning Techniques	4-15
How to Establish a Zone	4-15
How to Lock a Zone onto a Word	4-16
How to Designate Field Setup Options	4-17
OMR Fields	4-19
Dictionaries	4-23
How to Define an OMR Field's Dictionary	4-25
Dictionary Files (.hex)	4-27
5	5-1
RuleSets, Rules and Actions	5-1
Introduction	5-2
Rule Manager Window – Rules Panel	5-4
RuleSet Types	5-8

How to Define a New RuleSet Type.....	5-12
How to Assemble a RuleSet Type's Actions Library.....	5-13
RuleSets and Rules.....	5-16
How to Define a RuleSet and its Rules.....	5-20
How to Test a RuleSet	5-22
Testing Options	5-23

6..... 6-1

Workflows, Jobs and Tasks..... 6-1

Introduction.....	6-2
Workflow Definition.....	6-4
How to Add A Workflow.....	6-5
Job Definitions	6-7
How to Add a Job to a Workflow	6-8
Task Definitions	6-10
How to Construct a Task Project.....	6-11
How to Define a Task.....	6-14
Stage 1: Defining the Task Module.....	6-14
How to Define a New Task Module	6-15
Stage 2: Task Identity	6-17
"Queue to" and "Store" Properties	6-20
Stage 3: Task Setup.....	6-22
Stage 4: Task Settings.....	6-23
Stage 5: Task Security.....	6-29
Special Task Setup Procedures.....	6-34
Batch Routing.....	6-34
Filters	6-38

7..... 7-1

Scan Tasks: vScan, kScan, iScan 7-1

Introduction.....	7-3
Scan Task Setup and Datacap Support.....	7-3
vScan Tasks	7-4
vScan Setup	7-4
vScan Task Definition	7-4
vScan Operations.....	7-8
Troubleshooting vScan	7-8
kScan Tasks	7-9
kScan Task Setup – Structure	7-9
kScan Task Project.....	7-10
kScan Task Identity.....	7-12
kScan Task Setup - Specifications.....	7-14
kScan Settings File	7-16
kScan Source Device Specifications	7-17
How to Provide the kScan Task with an Existing Source Device.....	7-17
kScan Task Setup – Task Settings	7-20
kScan Operations.....	7-21
Scan	7-21
StartBatch Data.....	7-22

Scanning	7-23
Review & Repair	7-23
Features of the Review & Repair Dialog	7-24
Processing Buttons of the Review & Repair Dialog	7-28
Merging and Splitting Documents.....	7-31
kScan Page Files	7-32
Endorsements, Page Data and Document Data	7-33
iScan Tasks.....	7-35
iScan Task Setup - Structure	7-39
iScan Task Project.....	7-39
iScan Task Module	7-43
iScan Task Identity.....	7-46
iScan Task Setup - Specifications	7-48
File Designations	7-50
Scanner Settings.....	7-50
Advanced Scanner Settings	7-53
Other Task Options.....	7-53
iScan Task Settings	7-54
iScan Task Operations.....	7-56
Scan.....	7-56
StartBatch Data.....	7-57
Scanning.....	7-58
End Task Data	7-59
Review and Repair.....	7-60
Features of the iScan Review & Repair Dialog	7-62
Processing Buttons of the Review & Repair Dialog	7-64
iScan Page Files	7-68
Endorsements, Page Data and Document Data	7-69
8.....	8-1
RuleRunner Tasks.....	8-1
Introduction.....	8-2
Setting up a RuleRunner Task	8-6
RuleRunner Task Setup – Phase 1: Task Project	8-7
RuleRunner Task Setup – Phase 2: Task Module.....	8-11
RuleRunner Task Setup – Phase 3: Task Identity.....	8-14
RuleRunner Task Setup – Phase 4: Task Criteria.....	8-16
RuleRunner Task Setup – Phase 5: Task Settings	8-20
RuleRunner Tasks – Operations.....	8-22
9.....	9-1
Verify Tasks and Data Entry Panels	9-1
Introduction.....	9-2
Components of a Verify Task.....	9-6
Configuration Components	9-7
Operating Components	9-8
Verify Task Setup.....	9-10
Prerequisites	9-10
Verify Task Setup – Task Project.....	9-11

How to Construct a Data Entry Panel	9-14
Panel Controls and Properties	9-18
Tab Order Properties	9-22
Verify Task Setup – Task Module	9-23
Verify Task Setup – Task Identity	9-25
Verify Task Setup – Task Criteria	9-27
Verify Task Setup – Task Settings	9-29
Verify Task Operations	9-32
Data Entry Tools.....	9-36
Menus and Toolbar	9-36
Validate Return Button.....	9-39
Hot Keys.....	9-39
How to Add Fields to a Data Entry Panel	9-43
How to Remove a Field from a Data Entry Panel	9-46

10..... 10-1

FixUp Tasks 10-1

Introduction.....	10-3
Processing Conditions.....	10-5
How to Define a Condition ID.....	10-5
Job Router Task Types	10-7
Rules, Actions and the Document Hierarchy	10-9
Objects and Properties of a Document Hierarchy.....	10-10
Document Integrity Rules	10-11
Document and Page Count Rules.....	10-13
How FixUp Hot Keys Work.....	10-15
Linking a Hot Key to a Task’s Condition	10-18
Child Job Definitions.....	10-19
kFixUp Tasks – Setup and Operation	10-23
kFixUp Tasks - Setup.....	10-23
kFixUp Setup – Phase 1: Task Project	10-25
kFixUp Setup – Phase 2: Task Module.....	10-29
kFixUp Setup – Phase 3: Task Identity.....	10-31
kFixUp Setup – Phase 4: Setup Specifications	10-33
kFixUp Options	10-35
Page Status Button.....	10-36
kFixup Setup – Phase 5: Task Settings	10-38
kFixUp: Task Parameters in the Parent Job	10-39
kFixUp Operations.....	10-40
kFixUp Panel – Batch View Area	10-41
kFixUp Panel – Image View Area	10-43
kFixUp Panel – Repair Tools Area.....	10-43
Join and Split Buttons	10-45
iFixUp Tasks – Setup and Operation	10-46
iFixUp Tasks - Setup.....	10-46
iFixUp Setup – Phase 1: Task Project	10-49
iFixUp Setup – Phase 2: Task Module.....	10-53
iFixUp Setup – Phase 3: Task Identity.....	10-55
iFixUp Setup – Phase 4: Task Specifications	10-57
iFixUp Options	10-58

Guide to Taskmaster Rules

Page Status Button.....	10-60
iFixup Setup – Phase 5: Task Settings.....	10-63
iFixUp - Additional Setup Considerations	10-64
Task Parameters in the Parent Job	10-64
Task Security	10-65
iFixUp Operations	10-67
iFixUp Panel – Batch View Area.....	10-68
iFixUp Panel – Image View Area	10-70
iFixUp Panel – Repair Tools Area	10-71
Join and Split Buttons.....	10-72
Page Statuses and Document Statuses	10-74
Anchor Fields – FixUp.....	10-77
How to Configure Anchor Fields	10-78
Step 1: Add an Anchor Field Object to the Document Hierarchy	10-78
Step 2: Assign a “Required” Status to the Anchor Field Object	10-78
Step 3: Zone the Anchor Field	10-80
How to Define Anchor Field Conditions and Rules.....	10-82
How to Define an Anchor Field’s RuleSet Type	10-85
PatternMatch RuleSet.....	10-87

Index

Glossary