
Welcome

Welcome to *Taskmaster*...and to the *Windows & Dialogs Reference*.

This text examines the structure, content and use of *Taskmaster*'s primary window: the multi-faceted **Taskmaster Window** provides Administrators, Supervisors and operators with access to Taskmaster Client, and to its full range of administrative and processing activities.

The *Windows & Dialogs Reference* also investigates the many windows and dialogs which carry out specialized, supporting roles.

In every case, the text includes descriptions of fields and settings, buttons, menus, and toolbars – and step-by-step procedures that show you how to use a window or dialog.

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

The chapter's topics include:

I. Typographic and Terminology Conventions	1-2
II. If You Need Help	1-2
III. About this Book	1-3
IV. How to Access a Pre-configured Application	1-6

- *Taskmaster* documentation includes a number of accompanying texts. The *Taskmaster Installation and Configuration Guide* covers installing and configuring all of the *Taskmaster* components, the *Administrator's Guide* covers development of *Taskmaster* Security, and the use of Report Viewer and AutoDelete technology. The *Guide to Taskmaster Rules* examines applications with tasks governed by rules **you** define...rules that a task applies to objects at the **Batch, Document, Page** and **Field** levels of a Document Hierarchy. The *Rule Manager Reference* describes features of the supporting **Rule Manager Window**. The *Guide to Datacap Studio* describes the features of Datacap Studio and the DStudio workshop – an advanced version of Rule Manager.


Typographic and Terminology Conventions

This book uses the following typographic and terminology conventions.


Convention:	Example:
Menu names are in Bold type.	From the File menu...
Menu commands are in Bold type.	From the Database menu, select the Run Tasks command.
Dialog names are in <i>BoldItalic</i> type.	The <i>Change Password</i> dialog is used to update User IDs and Passwords.
Window names are in <i>BoldItalic</i> type.	The <i>Taskmaster Window</i> is the command post of workflow operations.
Field names are in Bold type.	The Job ID field provides a job with a unique identifying code.
Drop-down list items are in <i>Italic</i> type.	The <i>VScan</i> item in the Task Module drop-down list...
Datacap product and application names are in <i>Italic</i> type.	<i>Taskmaster</i> , <i>Batch Pilot</i> , and <i>Rule Manager</i> are Datacap Taskmaster products. <i><SampleApp></i> is a sample, pre-configured applications.

If You Need Help

Here is the number for *Taskmaster's* technical support:

 914-259-1300

Please note that if you need to **fax** Datacap technical support, the fax number is:

 914-366-0500

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

 support@datacap.com

About this Book

The *Windows & Dialogs Reference* contains the following chapters.

Chapter 1: Welcome

Chapter 1 introduces you to Datacap, to *Taskmaster*, and to this text.

Chapter 2: Taskmaster Server Service Windows

This chapter investigates details of two windows. The opening section describes the role of the *Taskmaster Server Service* service, and the features of its **TMS Configuration** dialog. The second section of Chapter 2 reviews the elements of the **Taskmaster Server Window**. For information about installing the *Taskmaster Server Service*, see the *Taskmaster Installation and Configuration Guide*.

For both windows, the documentation explains how you can use a window and its tools to:

- Set up and maintain links between the Taskmaster Clients of a Datacap network and the application's *Taskmaster* databases.
- Monitor and maintain an application's existing databases.
- Install new databases.
- Define and assign Data Source Names.

Chapter 3: Taskmaster Window

The **Taskmaster Window** is a Taskmaster Client's workplace. Chapter 3 thoroughly examines the **Taskmaster Window** and its components—its menus, toolbars, and supporting functions. Chapter 3 also explains how this window's structure changes as it moves in and out of three modes: *operating*, *supervisory* and *administrative*.

Chapter 4: Processing Windows and Dialogs

Chapter 4 explores the tools *Taskmaster* provides to those responsible for workflow operations. These are components or adjuncts of the **Taskmaster Window** when *Taskmaster* is in its *operating* mode and include:

Operations window. The shortcut icons in this window initiate task operations.

Task Monitor. This *information-only* window tracks the progress of a task as it processes each page of each document in a batch.

StartBatch panel. The Scan task operator enters essential batch information in the fields of this panel.

Batch End dialog. This versatile tool provides information about the contents of the new batch, and gives the Scan operator a chance to review the images of scanned pages.

Task Operations Message Pad. The *Message Pad* appears at critical points to announce the end of a task's operations, to ask for further instructions, or to highlight a processing problem.

Job Selection dialog. If a Scan task has been assigned to multiple jobs, the task's operator uses this dialog to select the applicable job.

Chapter 5: Job Monitor and Station Monitor

Chapter 5 explains these essential tools of the *Taskmaster Window* when it is in its *supervisory* mode:

The **Job Monitor** is a comprehensive guide to an application's batch processing activity. It is also a powerful device that Administrators and Supervisors use to manage details of job and task processing. This section also reviews the role of a **Job Monitor Manager**.

The **Station Monitor** tracks the processing activity of workstations on which Taskmaster Clients reside, and of the users (operators, Supervisors and Administrators) who are working from these workstations.

Chapter 6: Taskmaster Administrator

The **Taskmaster Administrator** defines an application's workflows, jobs and tasks, and the parameters of its Security Program. After an introduction to the **Taskmaster Administrator** itself, Chapter 6 explains the settings and use of its seven tabs:

Workflow. The *Workflow* tab of the **Taskmaster Administrator** defines one or more Workflow Hierarchies. A typical hierarchy consists of a workflow; a Main job whose core tasks carry out data capture operations; and, often, one or more "child" jobs responsible for special review and repair operations.

Modules. A Task Module determines the nature of a particular task, and the ways in which the task communicates with other components of a *Taskmaster* configuration. This tab lists the properties of the standard Task Modules, and shows the Administrator how to define new modules.

Groups. *Taskmaster* establishes Application Security on three levels: User, User Groups, Stations and Shortcuts. The *Groups* tab defines groups of users who have identical responsibilities, privileges and Job-Task permissions.

Users. Settings in the *Users* tab construct **required** Security Definitions for all individuals involved in administering, supervising or running *Taskmaster*.

Stations. This tab assembles a required Security Definition for each workstation on which Taskmaster Client resides.

Shortcuts. The *Shortcuts* tab defines the processing shortcuts that appear in the secondary **Operations** window of the **Taskmaster Window** (Chapter 4). A shortcut

(and its corresponding icon) links an *authorized* user to a set of Job/Task combinations for which he or she is responsible.

QA. When an Administrator sets up a Quality Assurance child job, the *QA* tab defines corresponding relationships between two sets of users: the *auditors* of a task's performance...and those who are *audited*.

- ✓ **Alert!** The *Windows & Dialogs Reference* does **not** cover:
 - The **Rule Manager Window**: see Chapter 3 of the *Rule Manager Reference*.
 - The **Document Hierarchy Setup Window**: see Chapter 3 of the *Guide to Taskmaster Rules*.
 - Pages of the Taskmaster Web Site: see Chapter 3 of the *Guide to Taskmaster Web* – and *Taskmaster Web Help* for each page.
 - The **Batch Pilot Window**: see Chapter 2 of the *Guide to Batch Pilot*.
 - Setup pages of the *Taskmaster* tasks: see the applicable chapters of the *Guide to Taskmaster Rules*.
 - The contributions of Datacap Studio to *Taskmaster* setup and operations. The *Guide to Datacap Studio* provides complete explanations of DStudio.

Glossary

The Glossary provides definitions of *Taskmaster* terms.

Index

The Index is an alphabetical listing of topics and sub-topics covered by the *Windows & Dialogs Reference*.

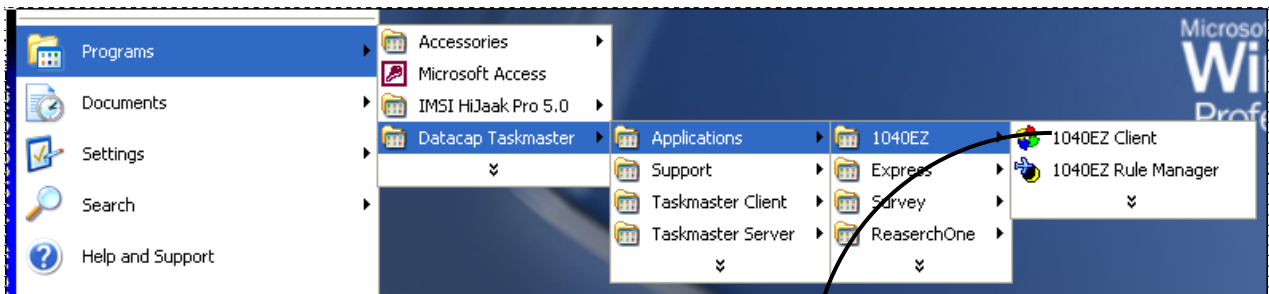
Very Important! This text relies heavily on illustrations from one foundation and one sample *Taskmaster* application:

- Invoices - This foundation application lets you process the invoices of multiple vendors – all at once. The *Invoices* application employs and demonstrates a complete set of features.
 - 1040EZ - This sample application lets you process 1040EZ Tax Returns. This training application is nearly indestructible, and is ideal for training and experimentation.
- ✓ To access a *Taskmaster* application, follow the instructions on the next page.

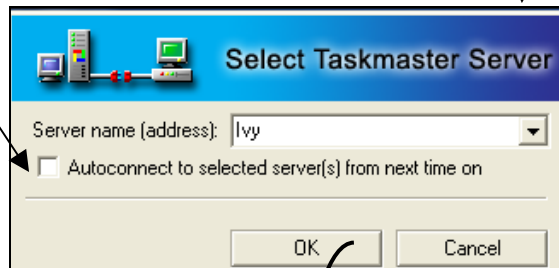
How to Access a Taskmaster Application

To access the 1040EZ training application (as an example):

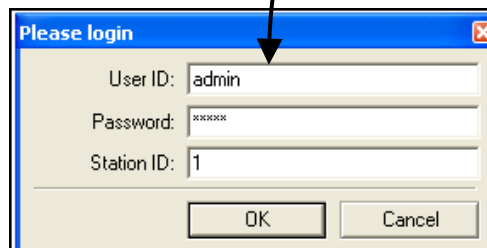
- ◆ Be sure that your configuration's Taskmaster Server Service is up and running (Chapter 2).
- ◆ Select **Datacap Taskmaster** from your Windows Start button's **Programs** options.
- ◆ Open the **1040EZ** sub-folder of the **Applications** folder – and double-click the **1040EZ Client** icon.
- ◆ Click the *Select Taskmaster Server* dialog's OK button. (If you select the **AutoConnect** option, this dialog will not appear when you Login again.)
- ◆ Enter your administrative User ID and Password, and Station ID, in the *Login* dialog (Chapter 5 describes these Security parameters.)
- ◆ Click the OK button.



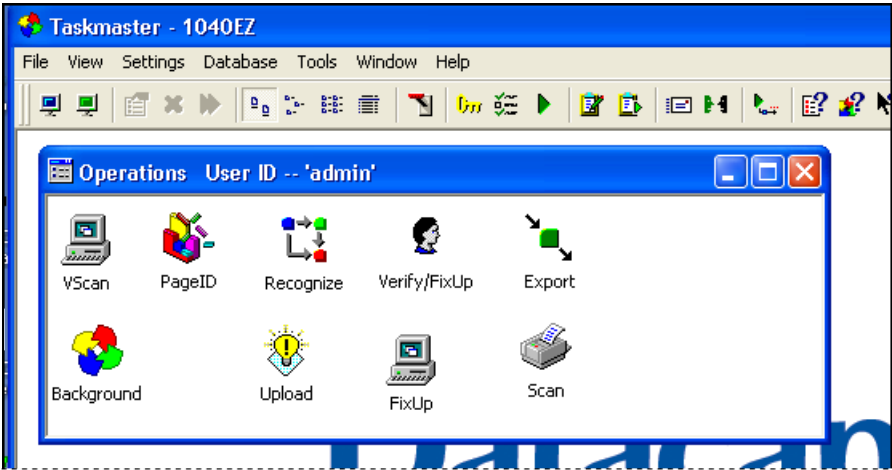
AutoConnect?



Select Taskmaster Server dialog



Please Login dialog



Taskmaster Window - with secondary Operations window