
Taskmaster Window

This chapter examines the *Taskmaster Window* and its components - its menus and toolbars, and the special functions you can call upon with the click of your mouse.

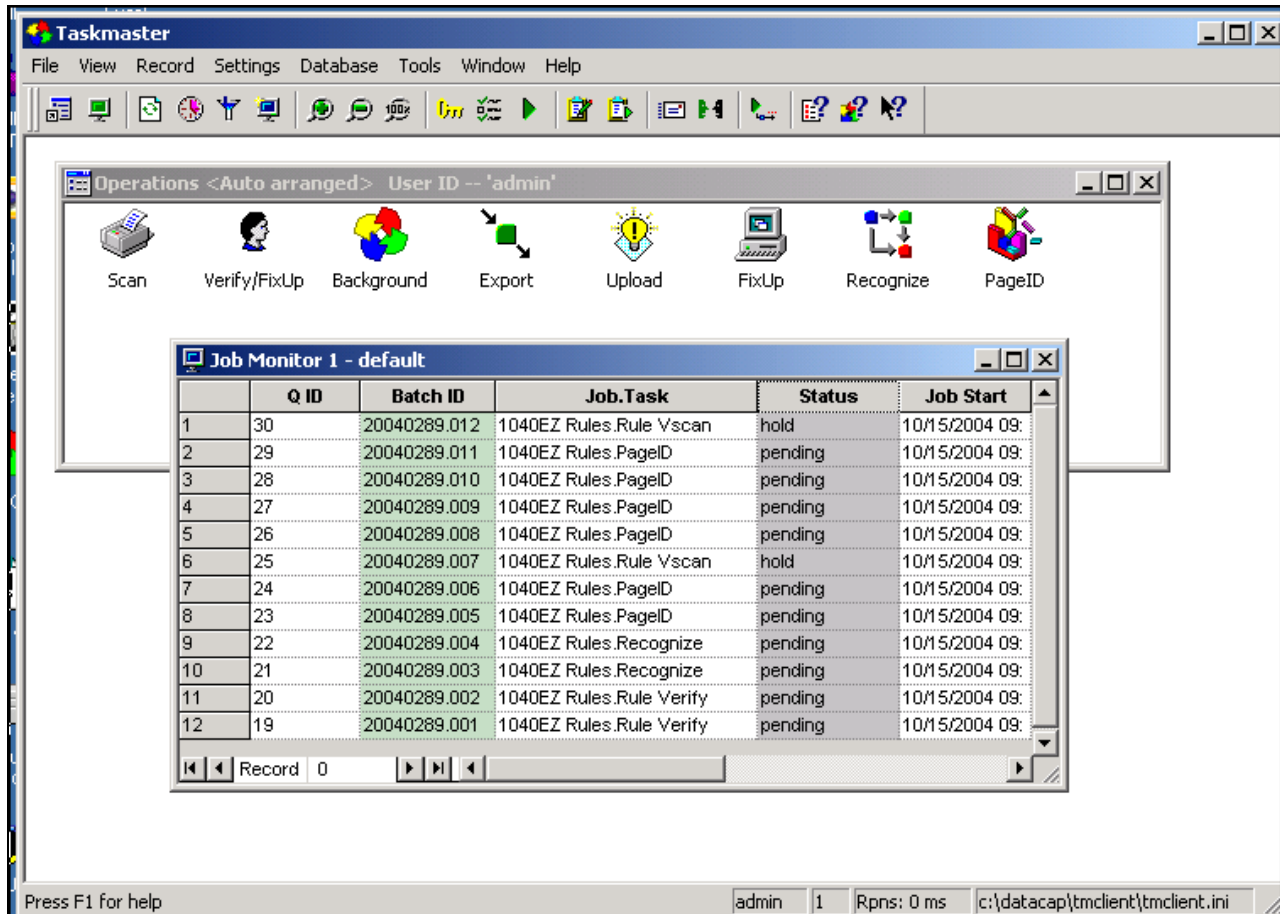
- ✓ Chapter 3 introduces but does *not* investigate windows such as the *Operations* window and *Task Monitor* (Chapter 4), and the *Job Monitor* and *Station Monitor* (Chapter 5).
- ✓ Similarly, Chapter 3 introduces but does not explore the *Taskmaster Administrator*. Reflecting both the scope of this topic and its importance, Chapter 6 deals exclusively with the *Taskmaster Administrator's* tabs, settings and procedures.

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- ☛ *Taskmaster's 1040EZ* training application supplies this chapter of the *Windows & Dialogs Reference* with numerous examples and illustrations. To access this application, follow the instructions on Page 5. And don't hesitate to experiment freely with *1040EZ* as you devise ways to take full advantage of the *Taskmaster Window* and its many tools.

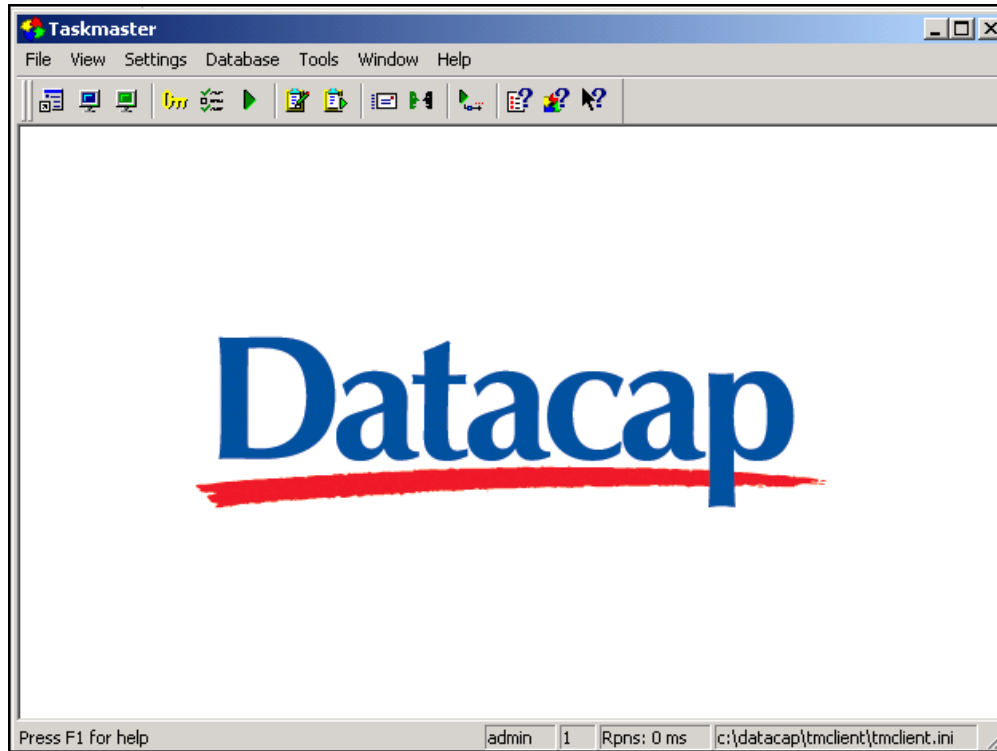


**Taskmaster Window – with
Operations Window and Job Monitor**

- ✓ The illustration above depicts the *Taskmaster Window* when two essential components are active:
 - The *Operations* window holds the Job-Task shortcut icons that allow authorized individuals – operators, supervisors and Administrators – to initiate a job’s task activity. Chapter 4 describes this window
 - The Batch Information Table of the *Job Monitor* is an up-to-the-minute list of all batches in the processing queue. Taskmaster’s *Job Monitor Manager* permits supervisory personnel to open and maintain multiple *Job Monitors*. For a complete explanation, see Chapter 5.

Taskmaster Window

The *Taskmaster Window* is the center of an application’s administrative and workflow activities.



Taskmaster Window

As Administrator, you’ll use this window and the tabs of the *Taskmaster Administrator* window (Chapter 6) to design and test an application’s workflows, jobs and tasks - and to install your Application Security program.

You’ll use the *Taskmaster Window* and its *Station Monitor* window (Chapter 5) to review the status of each participating workstation.

You, your supervisors, and your operators will use the *Taskmaster Window* and its *Operations* window (Chapter 4) to initiate and monitor a workflow’s jobs and tasks, and the batches they process.

In addition, special menu items and toolbar icons allow you to:

- Communicate with workstations and users in the Datacap network (Page 31).
- Initiate task processing from “remote” workstations (Page 80).
- Generate Log files detailing network activity (Page 70).

Upcoming pages examine the structure and components of the basic *Taskmaster Window*.

Accessing the Taskmaster Window

Application Security (Chapter 6) places strict limits on personal access to a *Taskmaster* application. With proper authorization, however, you can access the *Taskmaster Window* from your Windows Start button or from your desktop.

- ☛ **Alert!** The steps below assume that Taskmaster Server Service is in place and available to an application's Taskmaster Clients. For a full explanation, see Chapter 2.

To Access Taskmaster from the Start Button....

Step	Action
1.	Click on the Start button in the lower left-hand corner of your Windows screen.
2.	Select Datacap Taskmaster from the Programs directory, followed by Applications .
3.	From the list of pre-defined applications, select 1040EZ . This is a sturdy training application – easy to use and nearly impossible to abuse!
4.	Click once on the 1040EZ Client option (again, assuming that Taskmaster Server Service is up and running): the <i>User ID & Password</i> dialog will appear on your screen.



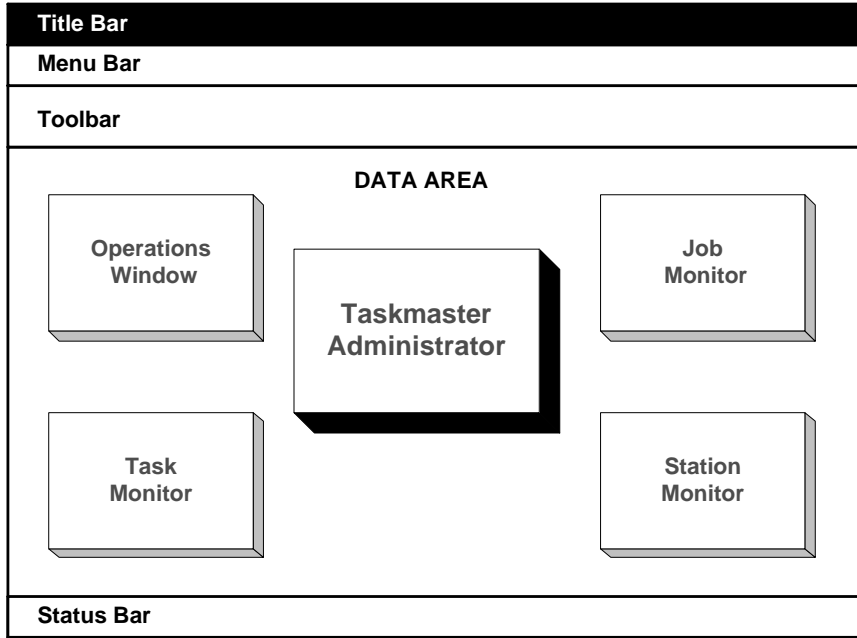
- To meet the initial requirements of Application Security, enter your **User ID** and **Password** in the *User ID & Password* dialog, and press the OK button: the *Taskmaster Window* will appear, along with its *Operations* window.

To access Taskmaster from your Desktop

To access *Taskmaster* from your desktop, double-click to open the **Datacap Taskmaster** folder, the **Applications** folder, and the **1040EZ** folder (or the folder for your application!). Double-click on the **1040EZ Client** icon (*not* the **1040EZ Serverless** icon), and carry out Step #5 above.

Taskmaster Window–Basics

The *Taskmaster Window* defines, initiates and supervises *every* aspect of an application’s workflow. The chart below illustrates the window’s components—and its scope.



Taskmaster Window

Title Bar. Information in the title bar identifies the *Taskmaster Window*. If the *Operations* window or *Job Monitor* is active, the Title Bar displays the application’s name (see the opposite page).

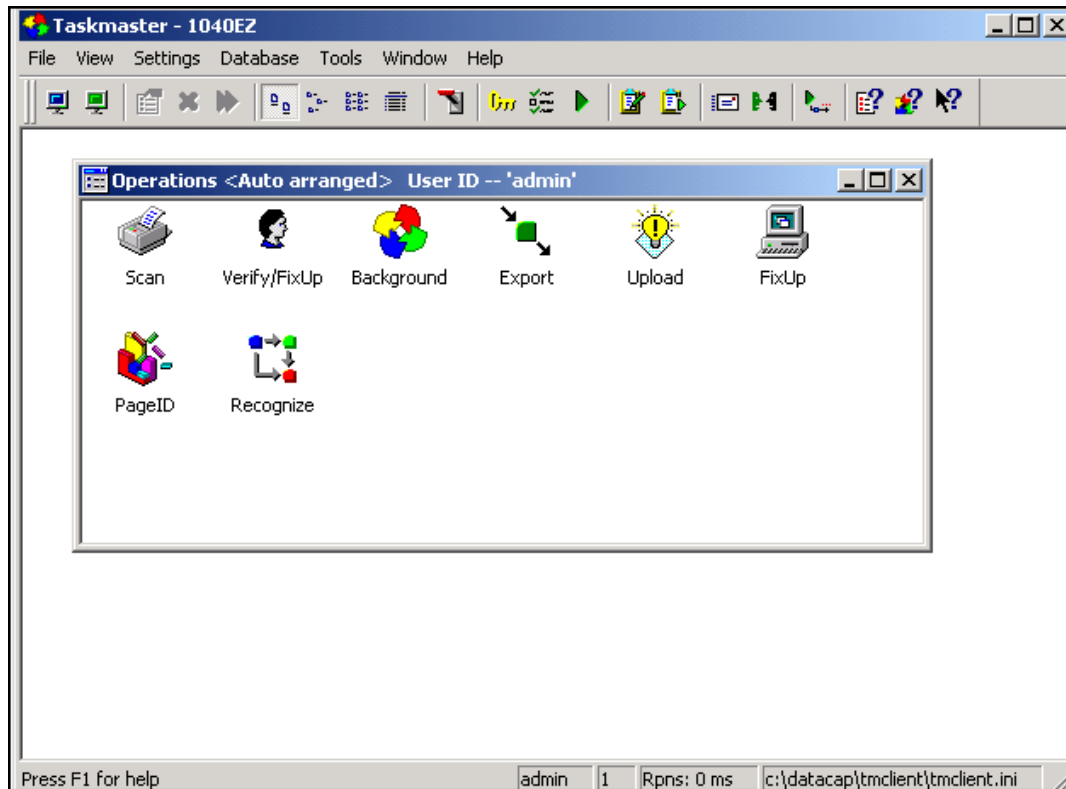
Data Area. Jump down to the Data Area for a moment. The *Taskmaster Window* functions in three modes—and its structure changes in response to the current mode.

- In an *operating* mode, the *Operations* window or *Task Monitor* dominates the Data Area (Chapter 4).
- In a *supervisory* mode, the *Job Monitor* and *Station Monitor* track workflow and workstation activity (Chapter 5).
- In an *administrative* mode, the *Taskmaster Administrator* defines workflows, jobs and tasks, and sets up Application Security (Chapter 6).

Menu Bar. The makeup of the Menu Bar changes in response to changes in mode (see the examples on the next page.) In its *operating* mode, when the *Operations* window is active, the *Taskmaster Window* has seven menus. In its *supervisory* mode, when the *Job Monitor* is active, the Menu Bar has eight menus. The contents of individual menus change, too. An “empty” *Taskmaster Window* has only two items in the **File** menu and six in the **View** menu. When the *Operations* window is active, the **File** menu has six items and the **View** menu has eleven. (For complete explanations of all menus and menu items – in all modes - see Page 9.)

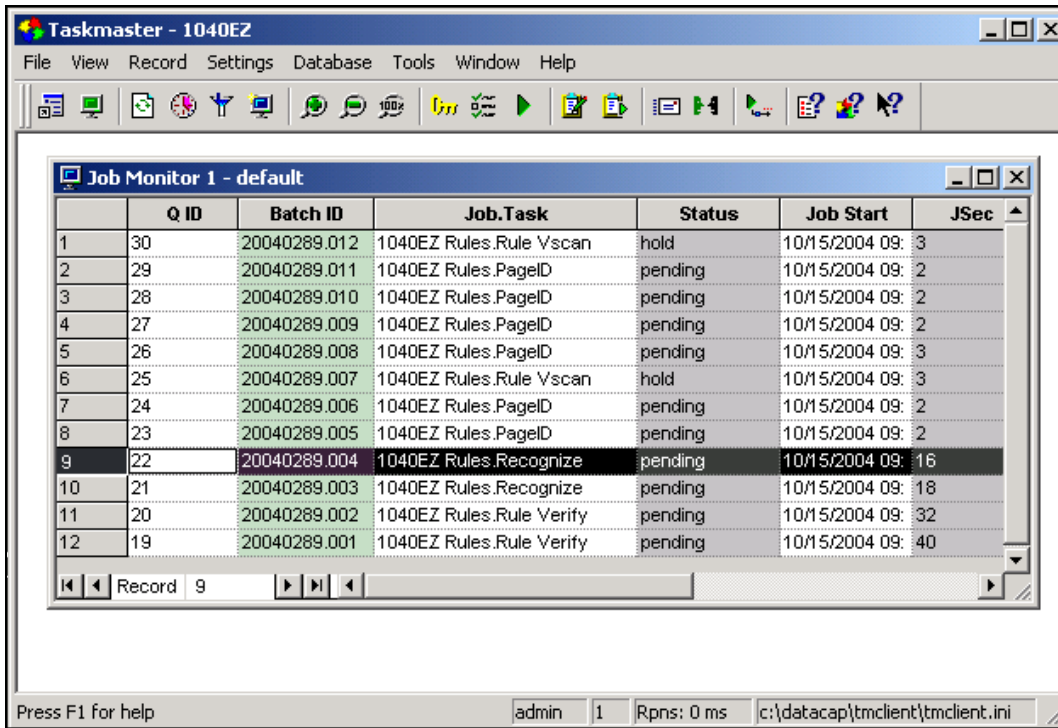
Toolbar. Most icons in the toolbar of the *Taskmaster Window* duplicate menu items. As a result, the toolbar's makeup changes according to the window's mode. You can also customize a toolbar by adding or removing icons available for that mode. (For explanations of the icons, see Page 31.)

Status Bar. The Status Bar identifies: the user and workstation; the server's response time to requests from this client (in milliseconds); and the Settings file (.ini) with specifications for the Taskmaster Client you're running.



Taskmaster Window—with Operations Window

Taskmaster Window–Basics



The screenshot displays the Taskmaster - 1040EZ application window. The main window contains a menu bar (File, View, Record, Settings, Database, Tools, Window, Help) and a toolbar with various icons. A sub-window titled "Job Monitor 1 - default" is open, showing a table of job tasks. The table has columns for Q ID, Batch ID, Job.Task, Status, Job Start, and JSec. The table contains 12 rows of data. Below the table is a navigation bar with "Record 9" and several arrow icons. At the bottom of the application window, there is a status bar with the text "Press F1 for help" and a log area showing "admin 1 Rpns: 0 ms c:\datacap\tmlclient\tmlclient.ini".

	Q ID	Batch ID	Job.Task	Status	Job Start	JSec
1	30	20040289.012	1040EZ Rules.Rule Vscan	hold	10/15/2004 09:	3
2	29	20040289.011	1040EZ Rules.PageID	pending	10/15/2004 09:	2
3	28	20040289.010	1040EZ Rules.PageID	pending	10/15/2004 09:	2
4	27	20040289.009	1040EZ Rules.PageID	pending	10/15/2004 09:	2
5	26	20040289.008	1040EZ Rules.PageID	pending	10/15/2004 09:	3
6	25	20040289.007	1040EZ Rules.Rule Vscan	hold	10/15/2004 09:	3
7	24	20040289.006	1040EZ Rules.PageID	pending	10/15/2004 09:	2
8	23	20040289.005	1040EZ Rules.PageID	pending	10/15/2004 09:	2
9	22	20040289.004	1040EZ Rules.Recognize	pending	10/15/2004 09:	16
10	21	20040289.003	1040EZ Rules.Recognize	pending	10/15/2004 09:	18
11	20	20040289.002	1040EZ Rules.Rule Verify	pending	10/15/2004 09:	32
12	19	20040289.001	1040EZ Rules.Rule Verify	pending	10/15/2004 09:	40

Taskmaster Window–with Job Monitor

Menus of the Taskmaster Window

The sections below describe the fully-expanded menus of the *Taskmaster Window*. If applicable, the overview of a menu highlights the changes that occur in response to changes in the *Taskmaster Window*'s mode.

In addition, descriptions of individual menu items (Page 11) identify any links to icons of the window's toolbar.

File Menu

Overview

The **File** menu of an empty *Taskmaster Window* has two core functions:

- **Message Font** gives you a chance to review or modify the default font and type size of the *Taskmaster Message Pad*.
- **Exit** closes the *Taskmaster* application.

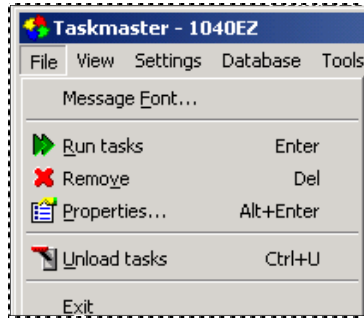
In the window's *operating* mode—when the *Operations* window is active—the menu adds four workflow items to the core functions:

- **Run Tasks** initiates tasks represented by a Job-Task shortcut you've highlighted in the *Operations* window (illustrated on the next page.)
- **Remove** removes a highlighted Job-Task shortcut from the *Operations* window...after an appropriate warning.
- **Properties** accesses a highlighted icon's *Shortcut Properties* dialog (Chapter 6), and a list of the shortcut's Job-Task permissions.
- **Unload Tasks** closes the windows and dialogs associated with a task that is not active at the moment.

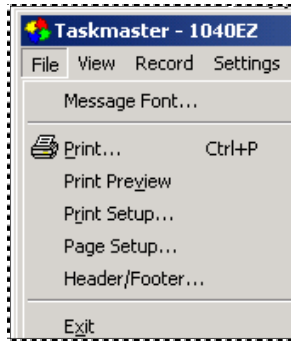
In the window's *supervisory* mode—when the *Job Monitor* or *Station Monitor* is active—the menu provides items the Administrator can use to format printouts of the tables these windows contain:

- **Print, Print Preview** and **Print Setup** retrieve standard Windows printing dialogs.
- **Page Setup** formats the tables before they are printed, according to the Administrator's specifications.
- **Header/Footer** governs the generation of a report's header and footer information.

File Menu





File Menu—Operating Mode



File Menu—Supervisory Mode

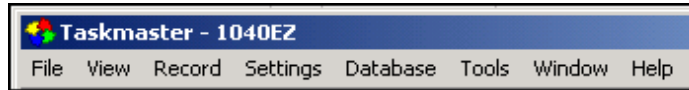
Items of the File Menu

The table below describes all items of the complete **File** menu.

Item	Keyboard	Windows	Description
Message Font	n/a	All	Accesses the Windows <i>Font Selection</i> dialog. You can use this dialog to modify the <i>Message Pad's</i> font, type size and format.
Run Tasks	Enter	<i>Operations</i>	Initiates the Job/Task Combination represented by the shortcut icon you've highlighted in the <i>Operations</i> window (see the illustration on the previous page.) If the icon represents one task assigned to one job, selecting Run Tasks begins task processing. If the highlighted icon represents a task assigned to multiple jobs within the application, the <i>Select Job to Run</i> dialog will appear (Chapter 4).
Remove Tasks	Del	<i>Operations</i>	Removes the highlighted shortcut from the <i>Operations</i> window's Data Area. <i>Taskmaster</i> will first ask you if you're sure you want to delete the icon. Pressing the Yes button removes the icon but does <i>not</i> delete the associated Job/Task Combination(s) from the workflow. However, they are now more difficult to reach: you have to use the Run Task item in the Databases menu (Page 25) or the Run Task toolbar icon (Page 35).
Properties	Alt + Enter	<i>Operations</i>	Accesses the <i>Shortcut Properties</i> dialog of a shortcut icon you've highlighted in the <i>Operations</i> window. This dialog lists the Job/Task Combinations represented by the shortcut (Chapter 6). The  toolbar icon duplicates this function.
Unload Tasks	Ctrl + U	<i>Operations</i>	Closes <i>Taskmaster</i> operations directly associated with any tasks that have stopped processing. The  toolbar icon duplicates the functions of this item.

File Menu (continued)

Item	Keyboard	Windows	Description
Print	Ctrl + P	<i>Job Monitor, Station Monitor</i>	<p>Accesses the Windows <i>Print</i> dialog.</p> <p>Note: The settings in the <i>Print</i> dialog reflect the host computer's most recent use of Windows technology to print a document. Be sure to check these settings carefully before printing <i>Job Monitor</i> or <i>Station Monitor</i> tables. For details, see Chapters 5.</p>
Print Preview	<i>n/a</i>	<i>Job Monitor, Station Monitor</i>	<p>Turns over the Data Area to the Windows <i>Print Preview</i> window.</p> <p>This window can be exceptionally helpful as you consider alternative report formats.</p>
Print Setup	<i>n/a</i>	<i>Job Monitor, Station Monitor</i>	<p>Accesses the Windows <i>Print Setup</i> dialog.</p> <p>Again, the settings in this dialog are those of the host computer's most recent printing "event" and may have no relevance to the generation of a supervisory report.</p>
Page Setup	<i>n/a</i>	<i>Job Monitor, Station Monitor</i>	<p>Accesses a <i>highly specialized</i> version of the Windows <i>Page Setup</i> dialog.</p> <p>The dialog deals exclusively with a report's table format. For more information, see Chapters 5.</p>
Header/Footer	<i>n/a</i>	<i>Job Monitor, Station Monitor</i>	<p>Accesses a Windows <i>Header/Footer</i> dialog.</p> <p>This dialog has a single focus: you can use it to review and modify the Header and Footer portions of a supervisory report (Chapter 5).</p>
Exit	<i>n/a</i>	All	<p>Closes Taskmaster Client.</p> <p>If you are operating in a "serverless" mode, selecting this item also closes <i>Taskmaster</i>.</p> <p>If you are operating in client/server mode, Taskmaster Server Service remains active after the client signs off.</p>



Taskmaster Window. Full Menu Bar

View Menu

Overview

Like the **File** menu, the contents of the **View** menu of the *Taskmaster Window* change according to the window's mode. But the **View** menu is even more fluid.

When the Data Area of the *Taskmaster Window* is empty, the **View** menu contains items in four categories:

Customize accesses the *Customize Toolbar* dialog: you can use this dialog to review the makeup of the window's primary toolbar, and to assemble additional, special-purpose toolbars (Page 44).

Status Bar is a toggle switch that displays or hides the window's Status bar.

Operations, **Job Monitor** and **Station Monitor** retrieve their respective windows and place them in the *Taskmaster Window*'s Data Area.

Job Monitor Manager accesses a dialog that you can use to define and install multiple *Job Monitors* (Chapter 5).

When the *Station Monitor* is active in the Data Area of the *Taskmaster Window*, the **View** menu *adds* two categories: demagoguery

Zoom In, **Zoom Out** and **100%** alter the magnification of the *Station Monitor*'s appearance within the Data Area.

Find and **Find Again** are tools you can use to find entries in a large table.

The *Job Monitor* employs all items above, and adds three more:



Filter accesses the *Job Monitor Filter*. This powerful device lets you filter a long list of batch transactions which are awaiting processing or have completed their cycles, according to parameters you supply (Chapter 5). You can also use the tools of the *Job Monitor Manager* to define filters.

New Monitor places a second, duplicate *Job Monitor* within the Data Area. If the list of batches in the Batch Information Table grows suddenly and significantly, a second *Job Monitor* with the same data can help. Usually, however, you're better off using the *Job Monitor Manager* to plan, test and employ multiple *Job Monitors*.




When a *Job Monitor* or *Station Monitor* is active, the **View** menu adds a formatting category with four items. These allow you to "freeze" and un-freeze a column or rows of the Information Table which a prominent component of each (Chapter 5).

Items of the View Menu



The table below describes the items of the complete **View** menu.

Item	Windows	Keyboard	Icon	Description
Customize	All	n/a	n/a	Accesses the <i>Customize Toolbar</i> dialog. Settings in this dialog determine the makeup of the <i>Taskmaster</i> toolbar currently in use, and of any toolbars you add (Page 40).
Status Bar	All	n/a	n/a	Toggles the <i>Taskmaster Window</i> 's Status bar on and off.
Operations	All except <i>Operations</i>	Ctrl + O		Retrieves the <i>Operations</i> window (Chapter 4).
Job Monitor	All except <i>Job Monitor</i>	Ctrl + J		Retrieves the <i>Job Monitor</i> (Chapter 5).
Station Monitor	All except <i>Station Monitor</i>	Ctrl + S		Retrieves the <i>Station Monitor</i> (Chapter 5).
Job Monitor Manager...	All	n/a	n/a	Accesses the application's <i>Job Monitor Manager</i> , which you can use to set up and install multiple <i>Job Monitors</i> – each with a different purpose and scope (Chapter 5).
Large Icons	<i>Operations</i>	n/a	n/a	Displays “large” shortcut icons in the Data Area of the <i>Operations</i> window, with a title below each icon (Chapter 4). Note: These formatting options are also available if you right-click on the icon.
Small Icons	<i>Operations</i>	n/a	n/a	Displays significantly smaller icons in the Data Area of the <i>Operations</i> , with titles next to the icons.
List	<i>Operations</i>	n/a	n/a	Lists small icons and their titles along the left side of the Data Area.
Details	<i>Operations</i>	n/a	n/a	Lists small icons, with titles and descriptions, along the left side of the Data Area.

View Menu (continued)

Item	Windows	Keyboard	Icon	Description
Arrange Icons	<i>Operations</i>	<i>n/a</i>	<i>n/a</i>	Three settings that position a set of Large Icons or Small Icons within the Data Area of the <i>Operations</i> window. These items have no effect if the icons are in a List or Details structure (above).
Line Up Icons	<i>Operations</i>	<i>n/a</i>	<i>n/a</i>	Places the icons in one or more rows.
Align to Top	<i>Operations</i>	<i>n/a</i>	<i>n/a</i>	Places all icons in a row at the top of the Data Area.
Auto-Arrange	<i>Operations</i>	<i>n/a</i>	<i>n/a</i>	A toggle-switch that places all icons in a row at the top of the Data Area and locks them in place.
Zoom In	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>		Increases the magnification of data in the tables of the <i>Job Monitor</i> and <i>Station Monitor</i> .
Zoom Out	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>		Decreases the magnification of tables in the <i>Job Monitor</i> and <i>Station Monitor</i> .
100%	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>		Returns the magnification to a standard "100%."
Freeze Columns	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>	<i>n/a</i>	"Freezes" the data in columns you've highlighted in the window's Information Table. Freezing is a temporary display measure you can employ to control the range of scrolling to columns and rows.
Unfreeze Columns	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>	<i>n/a</i>	Releases a column you've previously frozen.
Freeze Rows	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>	<i>n/a</i>	Freezes the data in rows you highlight.
Unfreeze Rows	<i>Job Monitor, Station Monitor</i>	<i>n/a</i>	<i>n/a</i>	Releases previously frozen rows.

View Menu (continued)

Item	Windows	Keyboard	Icon	Description
Filter	<i>Job Monitor</i>	Ctrl + R		<p>Accesses the <i>Job Monitor Filter</i>.</p> <p>Often, the list of batch transactions in the <i>Job Monitor</i> grows quickly. <i>The Job Monitor Filter</i> uses search-and-select parameters you provide to revise the list's order, or to limit its content.</p> <p>For a full explanation, see Chapter 5.</p>
New Monitor	<i>Job Monitor</i>	<i>n/a</i>		<p>Adds a <i>Job Monitor</i> to the Data Area.</p> <p>This "new" <i>Job Monitor</i> is an independent window and is dominant when it first appears. Details are in Chapter 5.</p>
Find	<i>Job Monitor, Station Monitor</i>	Ctrl + F	<i>n/a</i>	<p>Accesses the <i>Find</i> dialog (Chapter 5).</p> <p>If you select a column heading in the table of the <i>Job Monitor</i> or the <i>Station Monitor</i> and enter a "key" value, this helpful device will take you right to the applicable row.</p>
Find Again	<i>Job Monitor, Station Monitor</i>	F3	<i>n/a</i>	<p>Repeats the most recent Find operation (above) from your current location within the table of the <i>Job Monitor</i> or <i>Station Monitor</i>.</p>

Record Menu

Overview

The **Record** menu is part of the Menu Bar when a *Job Monitor* or *Station Monitor* is the active component of the *Taskmaster Window*'s Data Area – or when the *Batch Selection* dialog appears during processing.

The menu contains the same set of navigational tools for all three: **First Record**, **Previous Record**, **Next Record** and **Last Record** move you swiftly from row to row within a table.

In addition, the **Refresh** item has two sub-menu options:

- **Update View** “refreshes” a table by adding new information about job and task processing in the case of the *Job Monitor* or *Batch Selection* dialog, or about the *Station Monitor*'s client/server connections.
- **Change Timeout** gives you a chance to change the timing of *Taskmaster*'s automatic updates to the Information Tables in these essential processing components of the *Taskmaster Window*.

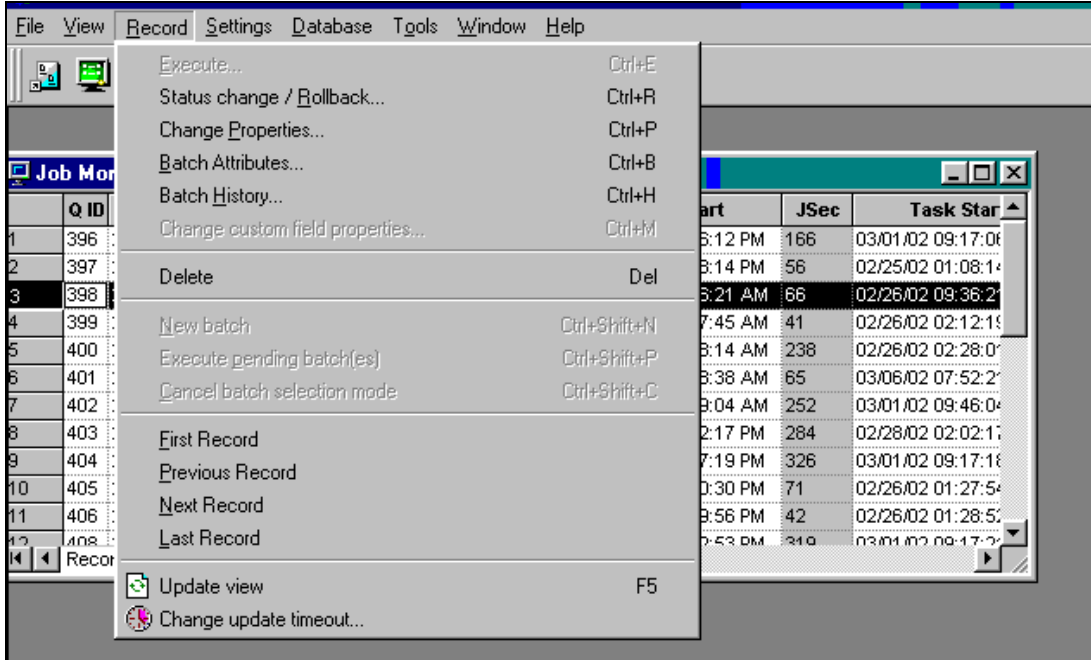


Items of the Station Monitor's Record Menu

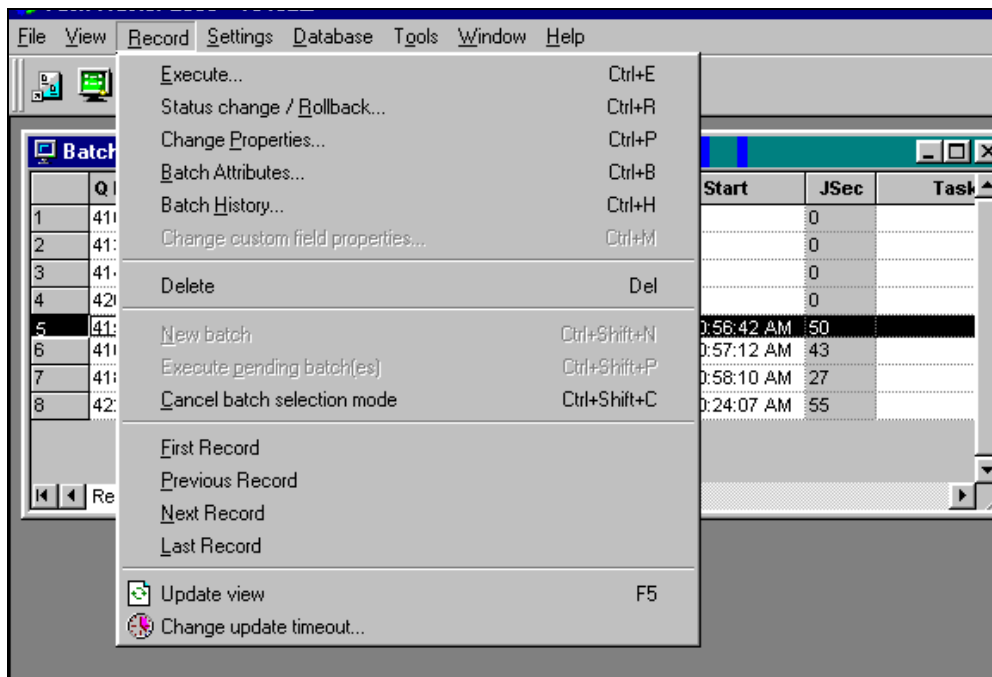
The *Station Monitor*'s **Record** menu includes only the items in the illustration above. However, when the *Job Monitor* and its closely related *Batch Selection* dialog are active, the list expands considerably (see the illustrations on the next page.)

- ✓ These functions add significantly to the value of the data in the Batch Information Tables. Upcoming pages introduce each item in the complete **Record** menu. Chapter 4 closely examines all elements of the *Batch Selection* dialog; Chapter 5 explores the *Station Monitor* and *Job Monitor*.

Record Menu



Record Menu: Job Monitor



Record Menu – Batch Selection Dialog

Items of the Record Menu

The table below describes *all* items of the **Record** menu.

Item	Window/Dialog	Keyboard	Description
Execute	<i>Batch Selection</i>	Ctrl + E	Initiates batch processing by the Job/Task Combination in the highlighted row of the Batch Information Table.
Status Change/ Rollback	<i>Job Monitor, Batch Selection</i>	Ctrl + R	Accesses the <i>Status Change/Rollback</i> dialog (Chapter 5). An authorized Supervisor or Administrator can use this dialog to roll back a batch to an earlier task, or to change its processing status.
Change Properties	<i>Job Monitor, Batch Selection</i>	Ctrl + P	Accesses the <i>Change Operator/Priority</i> dialog (Chapter 5) An authorized Supervisor or Administrator can use this dialog to assign a different operator to the batch, or to change the Priority rating of the current Job/Task Combination.
Batch Attributes	<i>Job Monitor, Batch Selection</i>	Ctrl + B	Accesses the <i>Batch Attributes</i> dialog. The fields of this dialog provide current, processing information about the batch (Chapter 5).
Batch History	<i>Job Monitor, Batch Selection</i>	Ctrl + H	Accesses the <i>Batch History</i> dialog and the data it contains about the progress of the batch through the workflow (Chapter 5).
Change Custom Field Properties	<i>Job Monitor</i>	Ctrl + M	Accesses the <i>Custom Field Properties</i> dialog. This dialog allows you to change the properties of a field in the row you have highlighted...in a column <i>you</i> have added to the Batch Information Table (Chapter 5).
Delete	<i>Job Monitor, Batch Selection</i>	Del	Allows an authorized Supervisor or Administrator to delete information about a listing in the Batch Information Table, or to delete the batch and all its files, along with the listing data (Chapter 4 and Chapter 5).
New Batch	<i>Batch Selection</i>	Ctrl + Shift + N	Creates a new batch, places the batch in the processing queue of the job's Scan task, and assigns a <i>Pending</i> status to the batch (Chapter 4). This option is available only for tasks built upon a <i>Batch Creation</i> Task Module. See the <i>Workflow Development and Operations Manual</i> for details.

Record Menu (continued)

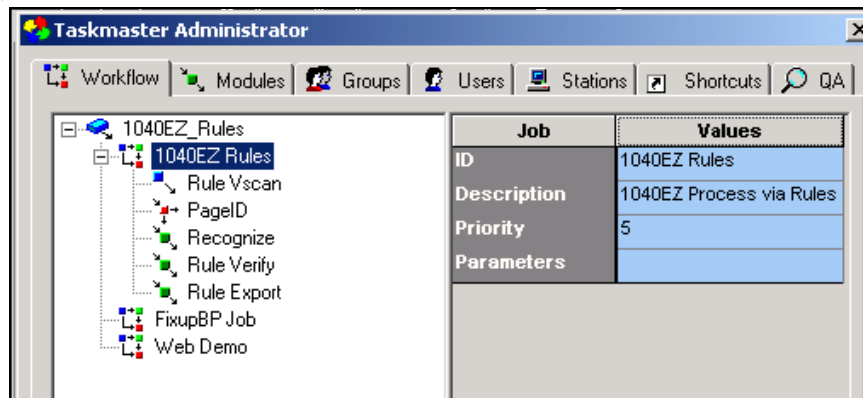
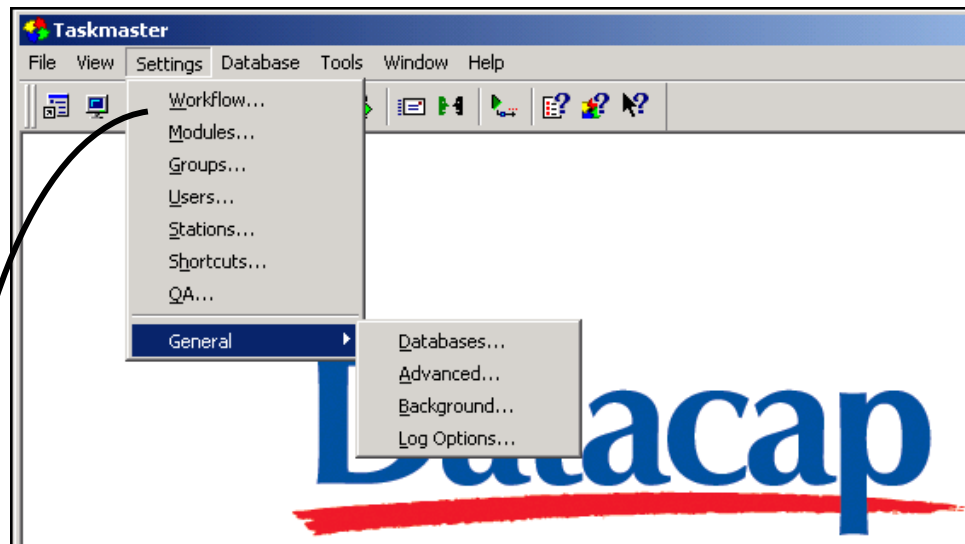
Item	Window/Dialog	Keyboard	Description
Execute Pending Batch(s)	<i>Batch Selection</i>	Ctrl + Shift + P	Gives an operator the chance to intervene manually by directing <i>Taskmaster</i> to process certain batches with a <i>Pending</i> status (Chapter 4.)
Cancel Batch Selection Mode	<i>Batch Selection</i>	Ctrl + Shift + C	Closes the <i>Batch Selection</i> dialog without taking any other action, and returns you to the Job-Task shortcuts in the <i>Operations</i> window.
First Record	<i>Job Monitor, Station Monitor, Batch Selection</i>	n/a	Moves your cursor to the first row of the Information Table.
Previous Record	<i>Job Monitor, Station Monitor, Batch Selection</i>	n/a	Moves your cursor to row above.
Next Record	<i>Job Monitor, Station Monitor, Batch Selection</i>	n/a	Moves your cursor to row below.
Last Record	<i>Job Monitor, Station Monitor, Batch Selection</i>	n/a	Moves your cursor to the table's final row.
Refresh	<i>Job Monitor, Station Monitor, Batch Selection</i>		<i>Taskmaster</i> automatically updates data in the tables of the <i>Job Monitor, Station Monitor</i> and <i>Batch Selection</i> dialog, according to a default schedule. The items in the Refresh sub-menu allow you to refresh the listing manually, or change the schedule.
Update View	<i>Job Monitor, Station Monitor, Batch Selection</i>	F5	Updates the table with information from <i>Taskmaster's</i> Admin or Engine databases. This option duplicates the role of the Refresh toolbar icon.
Change Timeout	<i>Job Monitor, Station Monitor, Batch Selection</i>	n/a	Accesses the <i>Change Timeout</i> dialog (Chapter 5). You can use this dialog to change the timing of the automatic updates. This option duplicates the role of the Refresh Timeout toolbar icon

Settings Menu

Overview

The **Settings** menu has two segments.


- The first has seven items, each leading to a tab of the *Taskmaster Administrator* (pictured below.) The table on the next page introduces you to the *Taskmaster Administrator* and its tabs; Chapter 6 provides a comprehensive examination of their structures, components and use.
- The **General** selection at the bottom of the **Settings** menu leads to the four tabs of the *Taskmaster Settings* dialog: *Databases*, *Advanced*, *Background* and *Log Options*. The table on the next page introduces this dialog and its tabs; full explanations begin on Page 52.



Taskmaster Administrator–Workflow Tab
Job Properties



Items of the Settings Menu

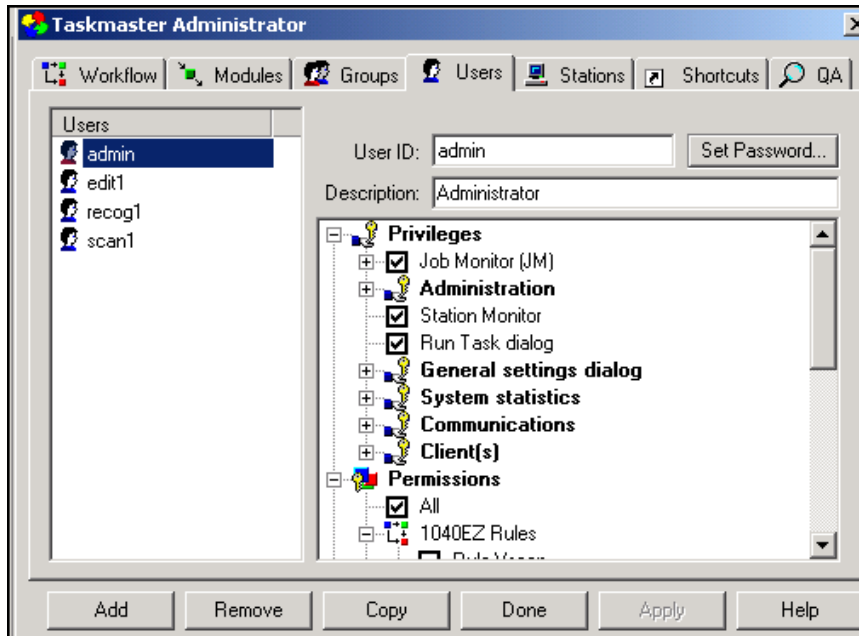
The table below describes the items of the **Settings** menu.

- ✓ The  icon opens the *Taskmaster Administrator* at the tab you worked with most recently. This menu does not include keyboard combinations.

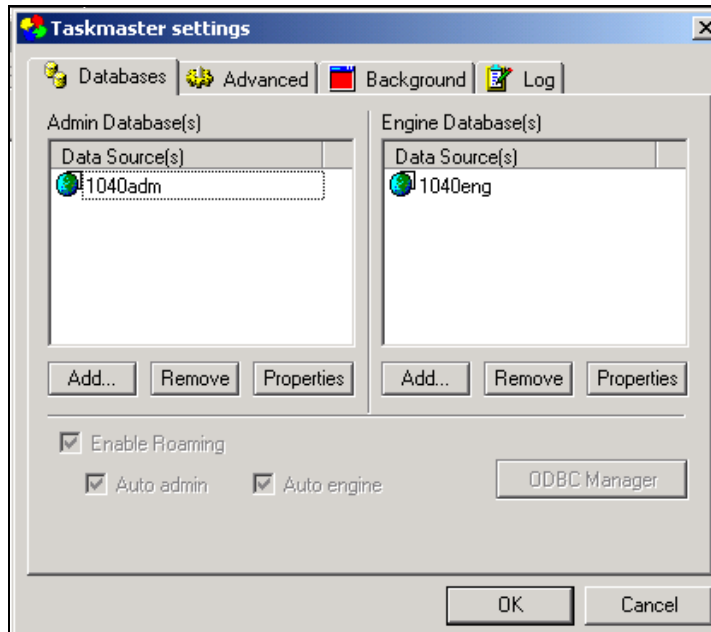
Item	Description
Workflow	<p>Retrieves the <i>Workflow</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>Settings in this tab set up an application's Workflow Hierarchies. A typical hierarchy consists of a workflow with a well-defined focus; a Main job made up of core tasks to process documents and pages – and the data they contain; and special-purpose child jobs.</p> <p>The example on the previous page highlights the structure of the <i>1040EZ_Rules</i> workflow, and the tasks of the workflow's <i>1040EZ Rules</i> job. Note <i>carefully</i> that the <i>1040EZ_Rules</i> workflow has two other jobs.</p> <p>Chapter 6 examines the <i>Workflow</i> tab and shows you how to set up a Workflow Hierarchy.</p>
Modules	<p>Retrieves the <i>Modules</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>This tab lists the processing modules that are the design and operating foundations for a workflow's tasks. For more about the critical role of a Task Module, see Chapter 6.</p>
Groups	<p>Retrieves the <i>Groups</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>The <i>Groups</i> tab establishes Users Groups, determines which users belong to a group, and assigns Job-Task permissions to the group.</p> <p>Along with the <i>Users</i>, <i>Stations</i> and <i>Shortcuts</i> tabs, settings in this tab construct an application's Security program. For details of the <i>Groups</i> tab, see Chapter 6. For a full explanation of <i>Taskmaster</i> Security, see the <i>Administrator's Guide</i>.</p>
Users	<p>Retrieves the <i>Users</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>This tab establishes Security codes and parameters for individuals who will be working with an application. For more about this tab, see Chapter 6, and the <i>Administrator's Guide</i>.</p>
Stations	<p>Retrieves the <i>Stations</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>This tab assigns Security codes and Job-Task permissions for workstations hosting a <i>Taskmaster</i> Client. For more about the <i>Stations</i> tab, see Chapter 6.</p>

Settings Menu (continued)

Item	Description
Shortcuts	<p>Accesses the <i>Shortcuts</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>The <i>Shortcuts</i> tab assembles a set of jobs and tasks, and assigns the set to a shortcut icon (Chapter 6). This icon can then appear in the <i>Operations</i> window.</p>
QA	<p>Retrieves the <i>QA</i> tab of the <i>Taskmaster Administrator</i>.</p> <p>If a workflow contains special Quality Assurance (QA) jobs and tasks, the <i>QA</i> tab determines which User Group (above) can carry out a QA job—and when. Chapter 6 shows you how to use this tab.</p>
General	<p>The <i>General</i> item is a sub-menu with three sub-items, each leading to a tab of the <i>Taskmaster Settings</i> dialog (Page 52).</p> <p data-bbox="768 751 824 821"></p> <p>You can use the  toolbar icon to access this dialog.</p>
Databases	<p>Retrieves the <i>Databases</i> tab of the <i>Taskmaster Settings</i> dialog.</p> <p>This tab identifies the Data Source Name (DSN) of the application's Engine database, and its Admin database. For more about this tab, see Page 52.</p>
Advanced	<p>Accesses the <i>Advanced</i> tab of the <i>Taskmaster Settings</i> dialog.</p> <p>Despite its name, the settings in this tab control basic <i>Taskmaster</i> processing features. For details, see Page 60.</p>
Background	<p>Accesses the <i>Background</i> tab of the <i>Taskmaster Settings</i> dialog.</p> <p>You can use this tab to provide an alternative background color or image for the Data Area of the <i>Taskmaster Window</i> (Page 63).</p>
Log	<p>Accesses the <i>Log</i> tab of the <i>Taskmaster Settings</i> dialog.</p> <p>The <i>Log</i> tab contains default settings governing the generation and display of Log files (Page 65).</p>



Taskmaster Administrator – Users Tab



Taskmaster Settings Dialog – Databases Tab

Database Menu

Overview

Directly or indirectly, items in the **Database** menu govern access to the application's Engine and Admin databases. These are *administrative* items and can be accessed *only* if the current User has the applicable administrative privileges (Chapter 6).

- **Login** allows the Administrator to sign on to an application by entering any previously-defined User ID and Password combination (Chapter 6). This simple procedure gives the Administrator a chance to test these elements of Application Security. **Logoff** instantly clears the Data Area of the Taskmaster Client with which you are working.
- **Change Password** lets the Administrator re-define a user's Password and Authentication, on-the-spot, without need for the *Users* tab of the **Taskmaster Administrator**.
- **Admin Roam** and **Engine Roam** direct the application to an alternative Admin or Engine database.
- **Run Task** lists your application's Job/Task Combinations. An authorized Administrator or Supervisor can initiate a task from this list without turning to the icons of the *Operations* window.


Items of the Database Menu

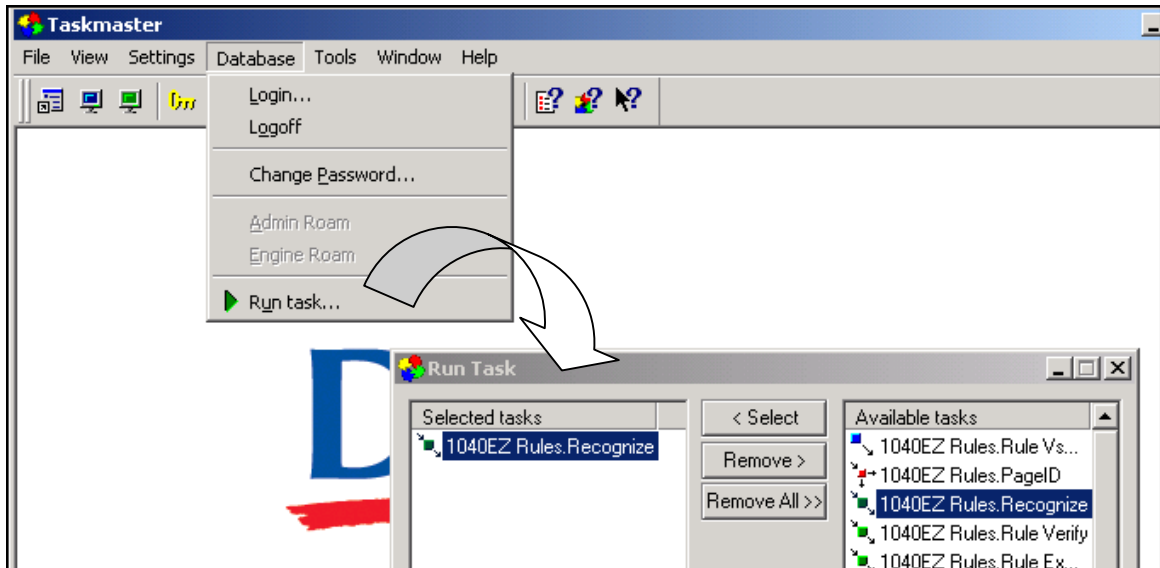
The table below describes the items of the **Database** menu.

- ✓ Items in the **Database** menu are available when any window or dialog is active in the **Taskmaster Window's** Data Area. There are no keyboard combinations for these options.

Item	Description
Login	Accesses the <i>User ID & Password</i> dialog. This is a very helpful tool when you are testing new or modified User Definitions (Chapter 6).
Logoff	Closes the Taskmaster Client with which you are working, and the Taskmaster Window .
Change Password	Retrieves the <i>Change Password</i> dialog. This is a handy tool when you are setting up an application and need to change an individual's User Password.

Database Menu (continued)

Item	Description
Admin Roam	<p>Connects <i>Taskmaster</i> to an alternative Admin database.</p> <p>This item is available only if:</p> <ul style="list-style-type: none"> • The configuration includes multiple Admin databases; • The Enable Roaming feature has been selected in the <i>Databases</i> tab of the <i>Taskmaster Settings</i> dialog (Page 52).
Engine Roam	<p>Connects <i>Taskmaster</i> to another Engine database.</p> <p>Again, this item is available only if:</p> <ul style="list-style-type: none"> • The configuration includes multiple Engine databases; • The Enable Roaming feature has been selected in the <i>Databases</i> tab of the <i>Task Settings</i> dialog (Page 52).
Run Task	<p>Accesses the <i>Run Task</i> dialog.</p> <p>An Administrator can use this dialog to select and test one or more tasks. For details, see Page 68.</p> <p>The  toolbar icon accesses this dialog as well.</p>



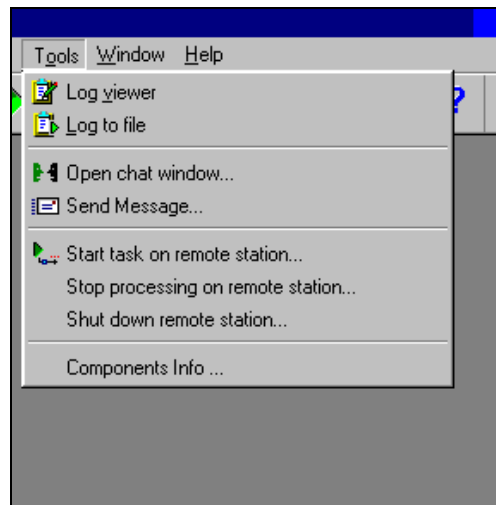
Taskmaster Window–Run Task Dialog

Tools Menu

Overview

Like those of the **Database** and **Settings** menus, items of the **Tools** menu are *administrative*:





- **Log Viewer** and **Log to File** determine the ways in which the application generates and displays logs of the client's *Taskmaster* activity.
- **Open Chat Window** and **Send Message** initiate and manage communications with members of your Datacap network.
- The three **Remote Station** items permit the Administrator to process workflow tasks from a workstation other than the station on which this Taskmaster Client resides.
- **Components info** provides details about this Taskmaster Client, and about its supporting Taskmaster Server Service.

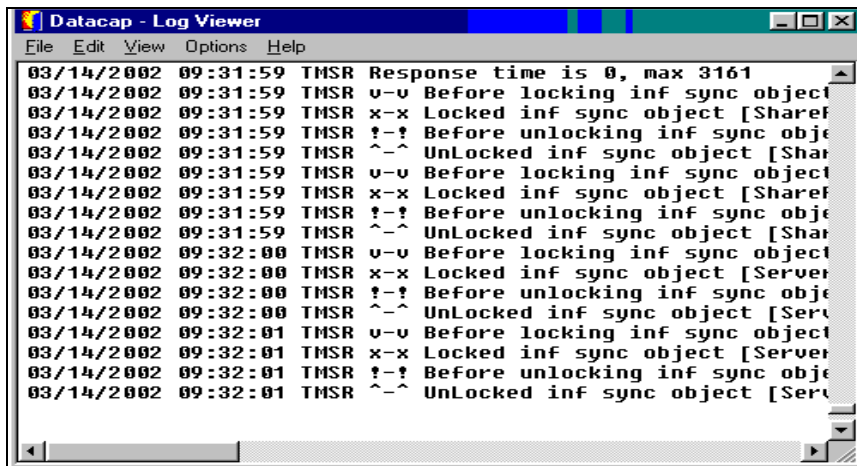


Tools Menu

Items of the Tools Menu


The table below describes the items of the **Tools** menu.

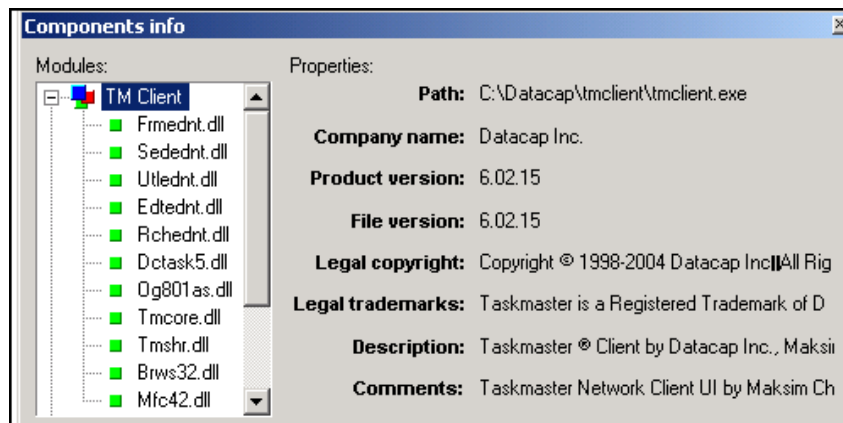
Item	Windows	Keyboard	Icon	Description
Log Viewer	All	n/a		Activates the <i>Datacap Log Viewer</i> . The <i>Log Viewer</i> displays and continuously updates information about the client's performance and its connections with Taskmaster Server Service. For details, see Page 70
Log to File	All	n/a		A toggle switch directing <i>Taskmaster</i> to add log data to a file. This option is available <i>only</i> if Enable Log File has been selected in the <i>Log</i> tab of the <i>Taskmaster Settings</i> dialog (Page 25).
Open Chat Window	All	n/a		Retrieves the <i>Chat</i> dialog. Any authorized user can use this dialog to open or participate in a Chat Room discussion (Page 46).
Send Message	All	n/a		Accesses the <i>Send Message</i> dialog. The <i>Send Message</i> dialog allows an authorized user to formulate a brief message and distribute it to clients in the Datacap network (Page 46).



Log Viewer – with sample data

Tools Menu (continued)

Item	Windows	Keyboard	Icon	Description
Start Task on Remote Station	All	n/a		Allows an Administrator to initiate a task on a remote client (Page 81).
Stop Processing on Remote Station	All	n/a	n/a	Directs the remote station to halt processing after it finishes with the current batch.
Shut down Remote Station	All	n/a	n/a	Closes the remote station's operations after it processes the current batch.
Components Information	All	n/a	n/a	Retrieves the <i>Components Information</i> dialog. In addition to version and release information about Taskmaster Server Service and Taskmaster Client, this dialog lists and describes the DLL components of each.

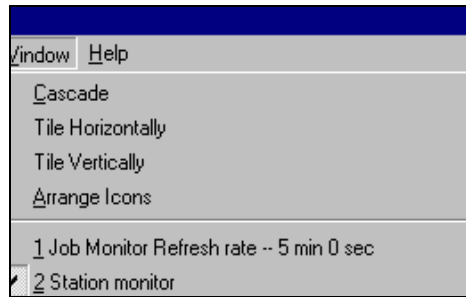


Components Information Dialog – with sample client data

Windows Menu




The upper segment of this menu includes standard Windows display options (illustrated below).

The lower segment lists any active, windows.



Help Menu

Items in the **Help** menu link you to three sources of *Taskmaster* information.

Item	Windows	Keyboard	Icon	Description
Help Topics	All	n/a		Connects you to the <i>Taskmaster</i> Help Index and Browser.
Session Information	All	n/a		Retrieves the <i>Session Information</i> dialog. This dialog contains facts about the Taskmaster Client you're running, and about its connections to Taskmaster Server Service.
About TM Client	All	n/a		Displays additional facts about Taskmaster Client, and about your Datacap configuration.

Taskmaster Window–Toolbar Icons

Three important concepts govern the makeup of the *Taskmaster Window's* toolbar.

Fluidity. The toolbar's contents change according to the role of the *Taskmaster Window* and the identity of the window or dialog that is active in its Data Area.

Client specificity. The format and layout of the toolbar in any environment is client-specific, and governed by settings in the Taskmaster Client's **tmclient.ini** file. This file resides in the **tmclient** folder of the on the host computer's **Datacap** directory.

Customization. The **tmclient.ini** file initially provides *default* configurations for the toolbar. When Taskmaster Client is first installed on a computer:

- The empty *Taskmaster Window* includes 14 toolbar icons.
- When the *Station Monitor* is active, there are 18 icons.
- When the *Job Monitor* is active, there are 12 icons.
- When the *Operations* window is active, the toolbar contains 12 icons.

But these are *Taskmaster's* default configurations. As Administrator, you can customize any configuration, adding or removing icons to enhance a user's performance.

As an example, compare the default layout of the *Job Monitor's* toolbar - the one that's in place when the *Job Monitor* is active – with the toolbar of the *Station Monitor* (both are illustrated on the next page).

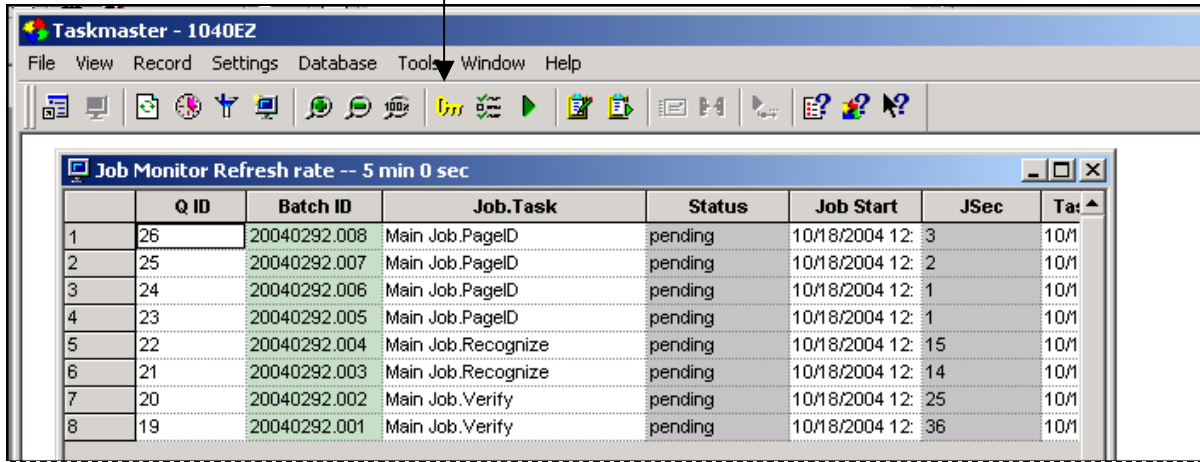
The *Station Monitor's* configuration has additional icons. As the next few pages explain, some are particularly relevant to the *Station Monitor's* activities and would be of little value to the *Job Monitor*.

But for other icons, this distinction may not be so clear. Consider the *Station Monitor's* three “magnification” icons. These tools instantly increase or decrease the type size of data in the window's Station Information Table (Chapter 5).

However, an early decision when you set up an administrative Taskmaster Client might well center on this question: When the *Job Monitor* is active, should the toolbar of the *Taskmaster Window* also include the magnification icons? (In the case of the *1040EZ* application, the *Job Monitor's* does include these icons!)

Modifying default configurations and adding new toolbars are straightforward procedures. But before you review the steps involved (Page 40), spend a few moments with the full inventory of toolbar icons. To begin, close any windows or dialogs in the Data Area of the *Taskmaster Window*, and select **Customize** from the **View** menu. The *Toolbars* tab of the *Customize Toolbar* dialog will appear on your screen (illustrated on Page 33).

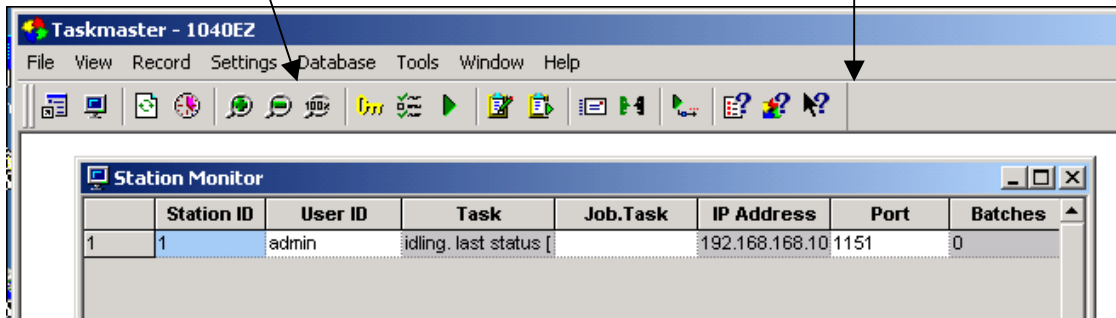
Job Monitor Toolbar Configuration



Taskmaster Window – with Job Monitor

Magnification icons

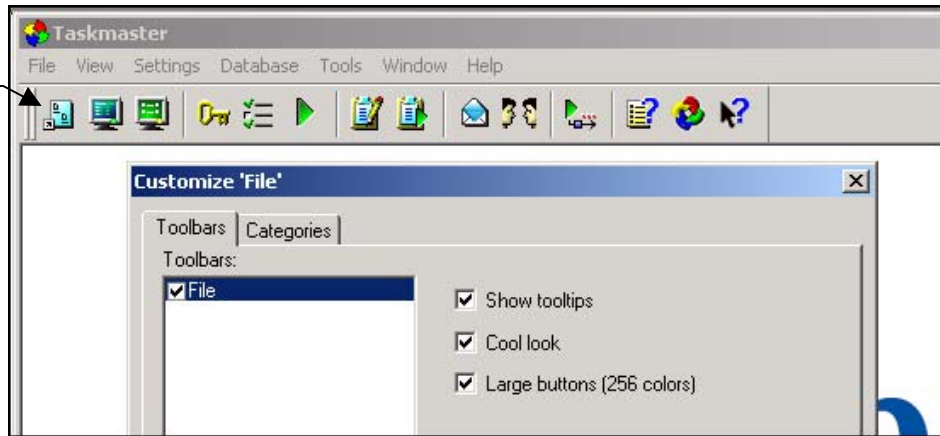
Station Monitor Toolbar Configuration



Taskmaster Window – with Station Monitor

The *Customize Toolbar* dialog has two tabs (illustrated on the next page.). The *Toolbars* tab identifies the toolbars which are active when the *Taskmaster Window* is in its current state. When the Data Area is empty, the **File** toolbar supplies the window’s icons. (If you open the *Customize Toolbar* dialog when the *Operations* window is active, this tab identifies one toolbar - the **Operations** toolbar.)

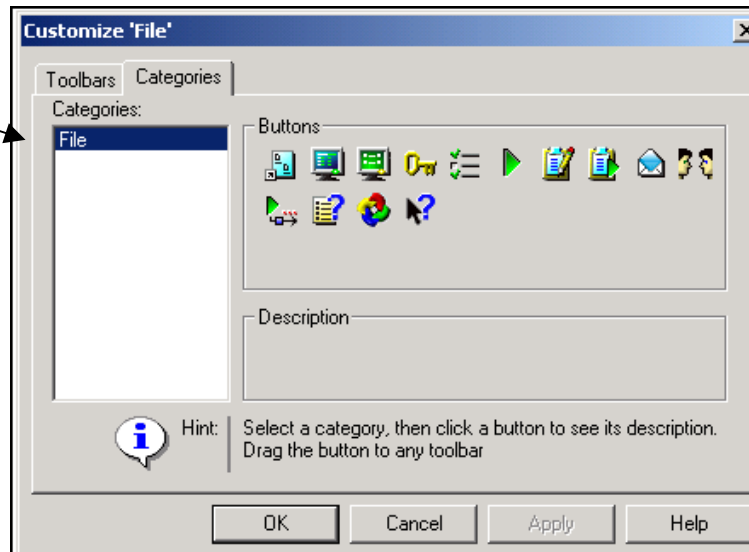
File configuration



Customize Toolbar Dialog – Toolbars Tab
File Toolbar

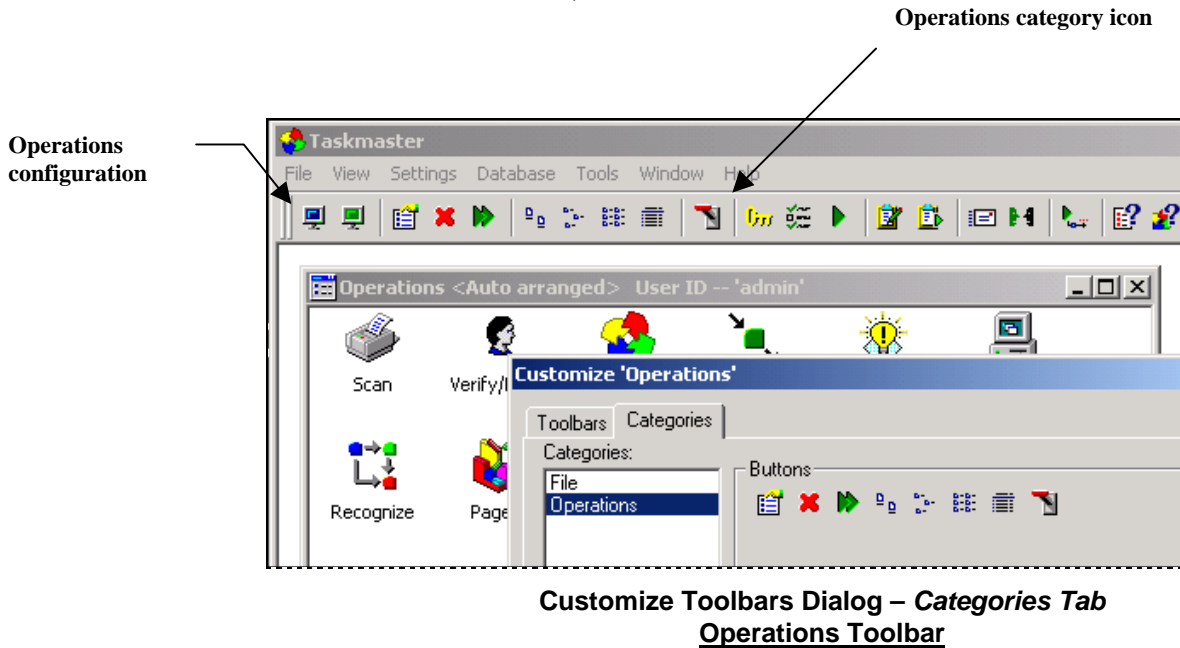
A *Taskmaster* toolbar consists of icons, of course, and icons fall into **categories**. To view all icons available for inclusion in the **File** toolbar, and the category to which they belong, go to the *Categories* tab (below). There are fourteen icons in the **File** category, and the default configuration of the **File** toolbar includes all fourteen.

File category

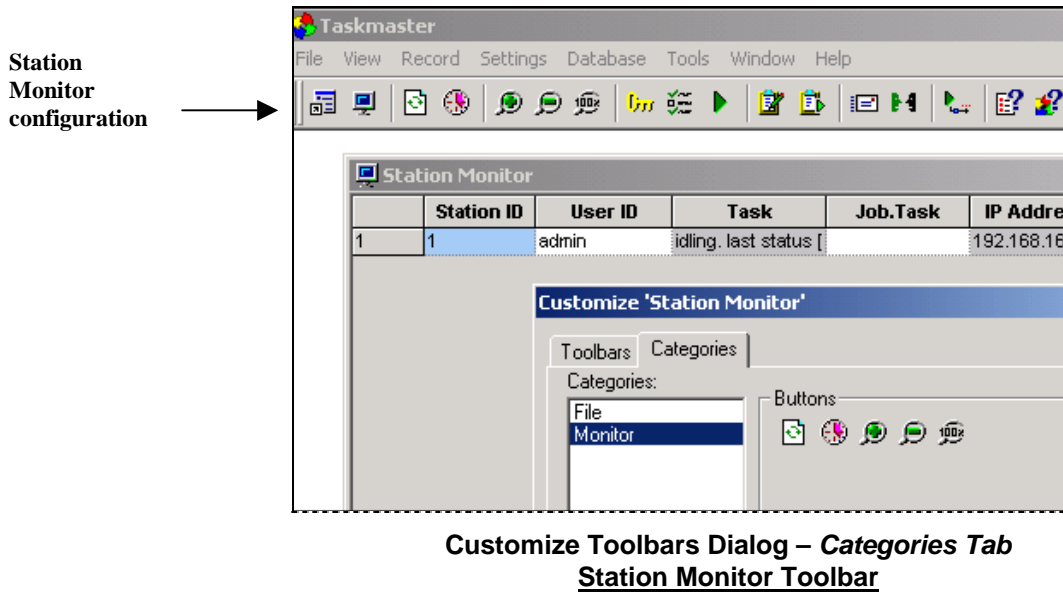


Customize Toolbar Dialog – Categories Tab
File Toolbar

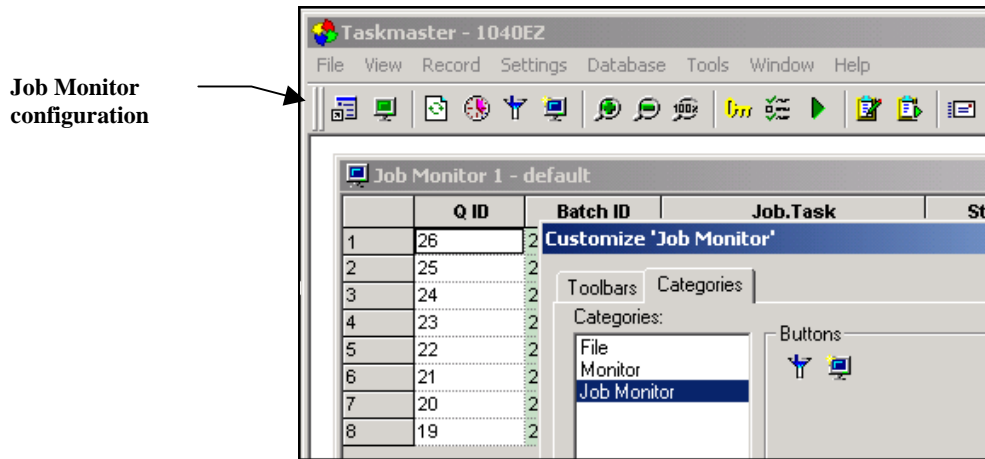
Now study the icons which are part of the *Taskmaster Window*'s default **Operations** configuration, keeping an eye on the icons in the **File** category as well (on the previous page). In this environment, the default toolbar features twelve icons. But *only one* is actually from the **Operations** category; the rest are **File** icons. (The other **Operations** icons are placed strategically among the menus of the *Taskmaster Window*, and are available for customization.)



The default **Station Monitor** configuration employs all five icons in the **Monitor** category, as well as thirteen icons from the **File** category:



Finally, the compact *Job Monitor* configuration adds two icons from the **Job Monitor** category, which have been set aside just for its use. The default icons also include two from the **Monitor** category, and eight from the **File** category.











**Customize Toolbars Dialog – Categories Tab
Job Monitor Toolbar**

Icons of the Taskmaster Window









The table below describes the icons in each category. Explanations of “Toolbar Placement” in the **Description/Default Placement** column indicate the default placements of the icon in specific toolbar configurations.

Category	Icon Title	Icon	Menu Item	Description/Default Placement
File				These are the core icons of the <i>Taskmaster Window</i> Toolbar.
	Operations		View/Operations	Retrieves the <i>Operations</i> window (Chapter 4). Default placement: File, Operations
	Job Monitor		View/Job Monitor	Retrieves the <i>Job Monitor</i> (Chapter 5). Default placement: File, Operations, Station Monitor
	Station Monitor		View/Station Monitor	Retrieves the <i>Station Monitor</i> (Chapter 5). Default placement: File, Operations, Job Monitor








Toolbar Icons (continued)

Category	Icon Title	Icon	Menu Item	Description
File (continued)	Taskmaster Administrator		Settings/ <i>Tab</i>	Opens the <i>Taskmaster Administrator</i> (Chapter 6). Default placement: File, Operations, Job Monitor, Station Monitor
	General Settings		Settings/General	Accesses the tabs of the <i>Taskmaster Settings</i> dialog (Page 52). Default placement: File, Operations, Job Monitor, Station Monitor
	Run Task		Database/Run Task	Opens the <i>Run Task</i> dialog (Page 68). Default placement: File, Operations, Job Monitor, Station Monitor
	Log Viewer		Tools/Log Viewer	Display or hides the <i>Taskmaster Log Viewer</i> (Page 72). Default placement: File, Operations, Station Monitor
	Log File		Tools/Log File	Starts or stops log entries to a Log file (Page 78). Default placement: File, Operations, Station Monitor
	Send Message		Tools/Send Message	Accesses the <i>Send Message</i> dialog. You can use this dialog to compose, distribute and respond to e-mail communications within your Datacap network. For details, see Page 46. Default placement: File, Station Monitor
	Chat		Tools/Open Chat Window	Opens a Datacap Chat Room (Page 49). Default placement: File, Station Monitor
	Run Task – Remote Station		Tools/Start Task (Remote)	Accesses the <i>Start Task on Remote Workstation</i> dialog. An Administrator can use this dialog to initiate workflow processing on another Taskmaster Client (Page 81). Default placement: File, Station Monitor




Toolbar Icons (continued)

Category	Icon Title	Icon	Menu Item	Description
File (continued)	Session Information		Help/Session Info	Displays information about this Taskmaster Client and the application's Engine and Admin databases. Default placement: File, Operations, Job Monitor, Station Monitor
	Program Information		Help/About TM Client	Provides more facts about the client. Default placement: File, Operations, Job Monitor, Station Monitor
	Help		Help/Help Topics	Accesses <i>Taskmaster</i> Help. Default placement: File, Operations, Job Monitor, Station Monitor
Operations				Icons in Operations category appear only in the Operations toolbar configuration or next to menu items.
	Shortcut Properties		File/Properties	Opens the <i>Shortcut Properties</i> dialog of a highlighted shortcut icon (Chapter 6). Default placement: Operations
	Remove Shortcut Components		File/Remove	Removes a highlighted shortcut icon from the <i>Operations</i> window's Data Area. Default placement: Operations
	Run Tasks		File/Run Tasks	Activates the <i>Run Tasks</i> dialog for a shortcut icon you've highlighted. Default placement: <i>None</i>
	Large Icons		View/Large Icons	Displays larger versions of an application's shortcut icons in the <i>Operations</i> window's Data Area. Default placement: <i>None</i>
	Small Icons		View/Small Icons	Displays smaller versions of an application's shortcut icons in the <i>Operations</i> window's Data Area. Default placement: <i>None</i>

Toolbar Icons (continued)

Category	Icon Title	Icon	Menu Item	Description
Operations (continued)	List: Icons		View/List	Displays small shortcut icons as a list along the left side of the <i>Operations</i> window's Data Area. Default placement: <i>None</i>
	Details: Icons		View/Details	Lists small shortcut icons and their descriptions along the left side of the <i>Operations</i> window's Data Area. Default placement: <i>None</i>
	Unload All Tasks		File/Unload Tasks	Closes procedures and windows associated with the most recent task activity. Default placement: Operations
Monitor				The Monitor category supplies icons to the Job Monitor and Station Monitor toolbar configurations. Note: the <i>Batch Selection</i> dialog uses the Job Monitor toolbar configuration.
	Refresh		Record/Refresh/ Update View	Updates the Information Table of the <i>Job Monitor</i> or <i>Station Monitor</i> . Default placement: Job Monitor, Station Monitor
	Change Timeout		Record/Refresh/ Change Timeout	Accesses the <i>Change Timeout</i> dialog. The settings in this dialog determine the rate at which <i>Taskmaster</i> automatically update the tables of the <i>Station Monitor</i> or <i>Job Monitor</i> . Default placement: Job Monitor, Station Monitor
	Zoom In		View/Zoom In	Increases magnification of rows in the tables of the <i>Station Monitor</i> or <i>Job Monitor</i> . Default placement: Station Monitor
	Zoom Out		View/Zoom Out	Decreases magnification of rows in the tables of the <i>Station Monitor</i> or <i>Job Monitor</i> . Default placement: Station Monitor

Toolbar Icons (continued)

Category	Icon Title	Icon	Menu Item	Description
Monitor (continued)	100% Zoom		View/100%	Restores magnification of rows in the tables of the <i>Station Monitor</i> , <i>Job Monitor</i> or <i>Batch Selection</i> dialog to the <i>Taskmaster</i> default. Default placement: Station Monitor
Job Monitor				The Job Monitor category contains icons available <i>only</i> to the Job Monitor toolbar configuration.
	Filter		View/Filter	Retrieves the <i>Job Monitor Filter</i> . You can use this dialog to limit the scope of a Batch Information Table for the <i>Job Monitor</i> or <i>Batch Selection</i> dialog (Chapter 5). Default placement: Job Monitor
	Second Monitor		View/New Monitor	Opens a second, independent <i>Job Monitor</i> within the Data Area of the <i>Taskmaster Window</i> . Default placement: Job Monitor

Customizing Toolbars

Although *Taskmaster* allows you to modify the structure and contents of the Taskmaster Client's toolbar, the scope of any changes is intentionally small. You can “hide” icons in a toolbar, or you can assemble special purpose toolbars from existing icons and place them strategically within the *Taskmaster Window*.

- *Taskmaster* Security automatically determines the availability of the toolbar's icons. In most environments, for example, operators do not have permission to access the tabs of the *Taskmaster Administrator*. As a result, when a Scan operator first signs on, the toolbar displays the icons in the **File** and **Operations** categories, but a number of the icons are grayed out, including the icon that activates the *Taskmaster Administrator*.

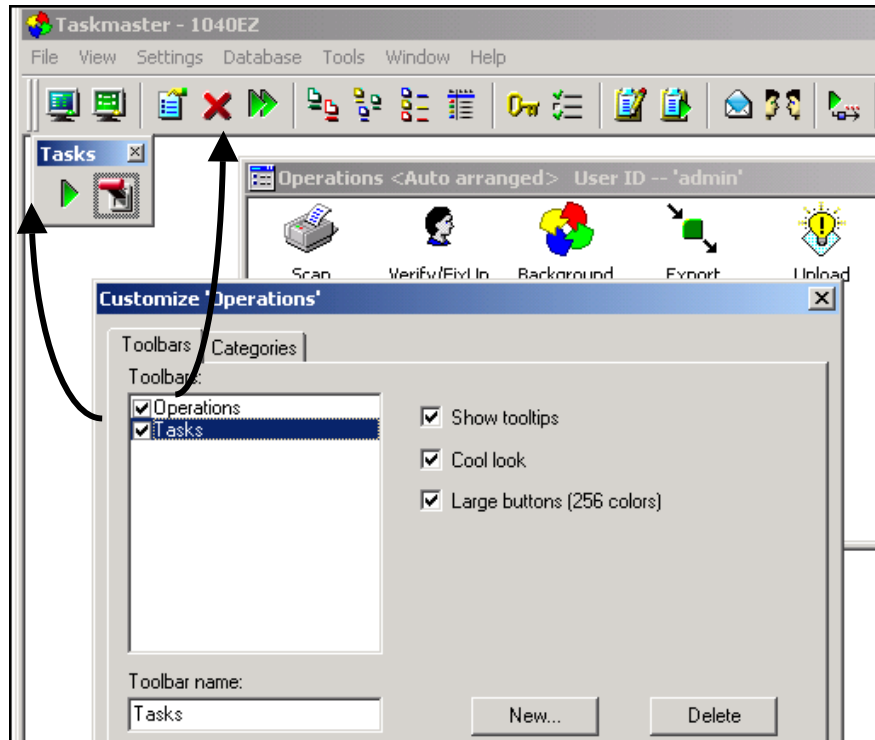
To review or modify the composition of a toolbar—or to add a new toolbar—you'll use the tabs of the *Customize Toolbar* dialog. To access this dialog, select **Customize** from the **View** menu: the *Toolbars* tab will appear on your screen.

Customize Toolbar Dialog

The *Customize Toolbar* dialog (illustrated on the next page) has two roles: it provides information about the principal toolbar configurations of *this* Taskmaster Client, and lets you modify or add to those configurations.

The components of this dialog include:

Component	Description
Title Bar	Identifies the principal toolbar configuration...the set of icons that will appear when a particular window is active in the Data Area of the <i>Taskmaster Window</i> . In the illustration, the Title Bar indicates “Customize Operations” because the <i>Operations</i> window is active.
Toolbars Tab	Lists properties of the primary toolbar configuration associated with the active window and <i>any</i> configurations you've added. This tab also sets up additional configurations and restores the default settings of primary configurations.
Categories Tab	Lists the icons of the categories that makeup the toolbar configuration (Page 35). The Operations configuration, for example, includes icons in the File and Operations categories. The <i>Categories</i> tab also assigns icons to new, toolbars (Page 44).
OK Button	Confirms additions or changes to toolbar configurations and closes the <i>Customize Toolbar</i> dialog.



Customize Toolbar Dialog–Toolbars Tab

Customize Toolbar Dialog (continued)

Component	Description
Cancel button	Closes the <i>Customize Toolbar</i> dialog without including additions or changes to toolbar configurations.
Apply button	Adds new or modified toolbar specifications to the application's Admin database.
Help Button	Links you to <i>Taskmaster</i> Help.

- ✓ The *Customize Toolbar* dialog has a subtle role that extends beyond the limits of its tabs. Opening this dialog “freezes” the icons in the *Taskmaster Window* toolbar. If you drag an icon from the toolbar into the window’s Data Area, the icon disappears. It **remains hidden** unless you press the Reset button on the *Toolbars* tab. Such a step affects the toolbar only when this window is active.

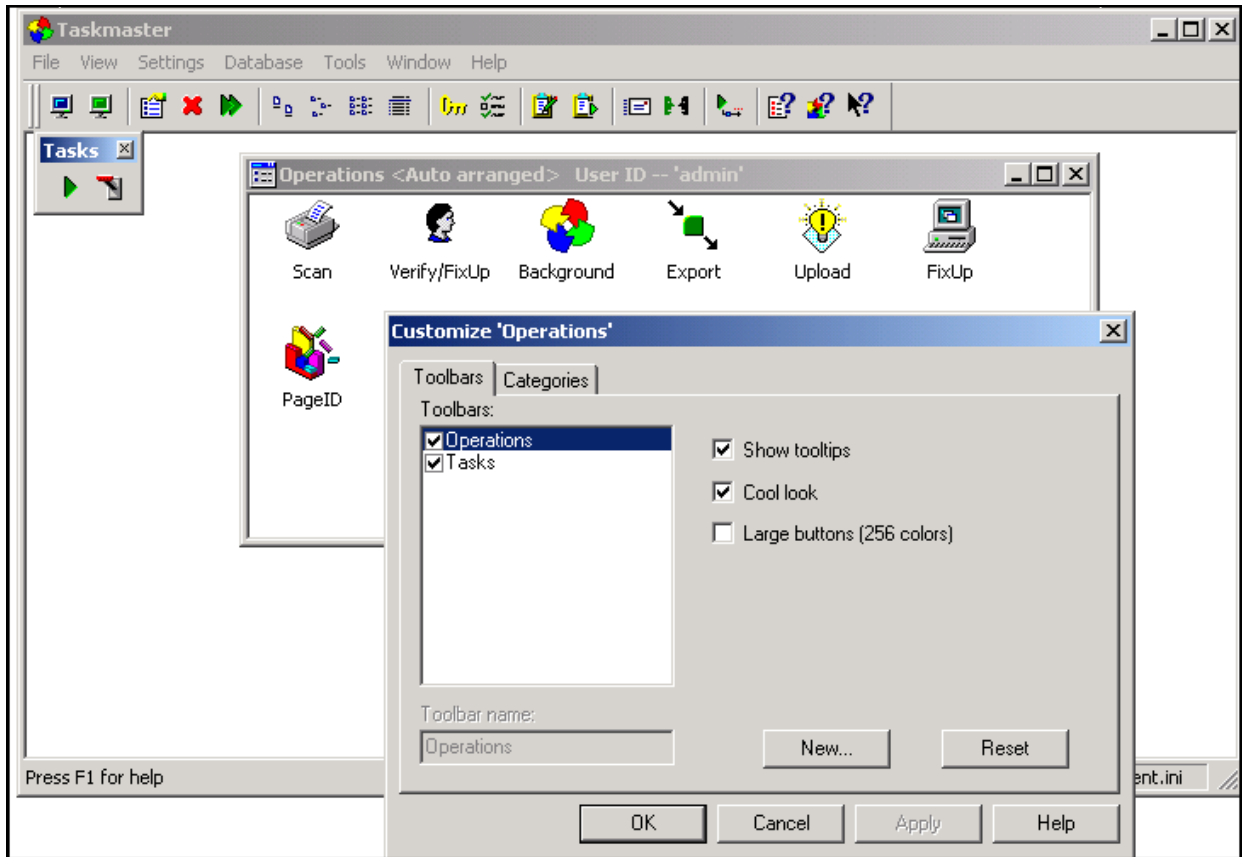
If the scope of a client’s activity is limited and well-defined, hiding icons can produce a more efficient toolbar.

Customize Toolbar Dialog–*Toolbars Tab*

In the example on the next page, the **Toolbars** field of the *Toolbars* tab identifies two toolbar configurations. The first is the standard **Operations** configuration and includes icons in the **File** and **Operations** categories.

But what about the **Tasks** configuration? This is a special-purpose toolbar, assembled by the application's Administrator to help her operators. It is concise, easy to find and easy to use...and appears only when the *Operations* window is active. Instructions for putting together such a toolbar are just as easy: you'll find them on Page 44. For now, spend a moment with the fields and functions of the *Toolbars* tab.

Field/Function	Description
Toolbars	The names of toolbar configurations associated with the active window in the <i>Taskmaster Window</i> . Unless you add a special-purpose toolbar, this field will have one entry.
Toolbar Name	The name of a toolbar configuration you've highlighted in the Toolbars field. If you select the principal toolbar configuration, the field is only for display. If you select any another configuration, the field is active.
Show Tooltips	A check box which, if activated, directs <i>Taskmaster</i> to display the title of an icon when a user's cursor approaches.
Cool Tool	A check box which, if activated, eliminates borders between icons and reduces their button-like appearance.
Large Buttons	A check box which, if activated, increases the size and brilliance of the toolbar's icons.
New button	Access the <i>New Toolbar</i> dialog. You can use this dialog to set up a toolbar (Page 44).
Reset button	If you remove icons from a principal toolbar, pressing this button returns the toolbar to its default configuration.
Delete button	If you highlight a configuration in the Toolbars field, the Reset button becomes the Delete button. You can remove the configuration with this button.



Customize Toolbar Dialog—Toolbars Tab

Customize Toolbar Dialog—*Categories* Tab

The *Categories* tab identifies the icon categories of a toolbar configuration, as well as the icons in each category.

The tab can also assign specific icons in these categories to a toolbar you're constructing. In the example on the next page, the **Tasks** toolbar is firmly in place but the Administrator is working on yet another (**Toolbar 3**).

The table below describes the fields and functions of the *Categories* tab.

Field/Function	Description
Categories	<p>The icon categories contributing icons to this toolbar configuration.</p> <p>In the example, icons of the <i>Taskmaster Window</i> toolbar when the <i>Operations</i> window is active come from two categories: File and Operations.</p> <p>This field does <i>not</i> list toolbars just because they are toolbars and not icon categories.</p>
Buttons	<p>The icons in a category you've highlighted.</p> <p>Alert! Dragging an icon from this field to the Data Area of the <i>Taskmaster Window</i> automatically sets up a toolbar. You can expand the toolbar by dragging other icons from this field to the toolbar.</p>
Description	<p>A brief description of an icon you select from the Buttons field <i>or</i> from a toolbar.</p>

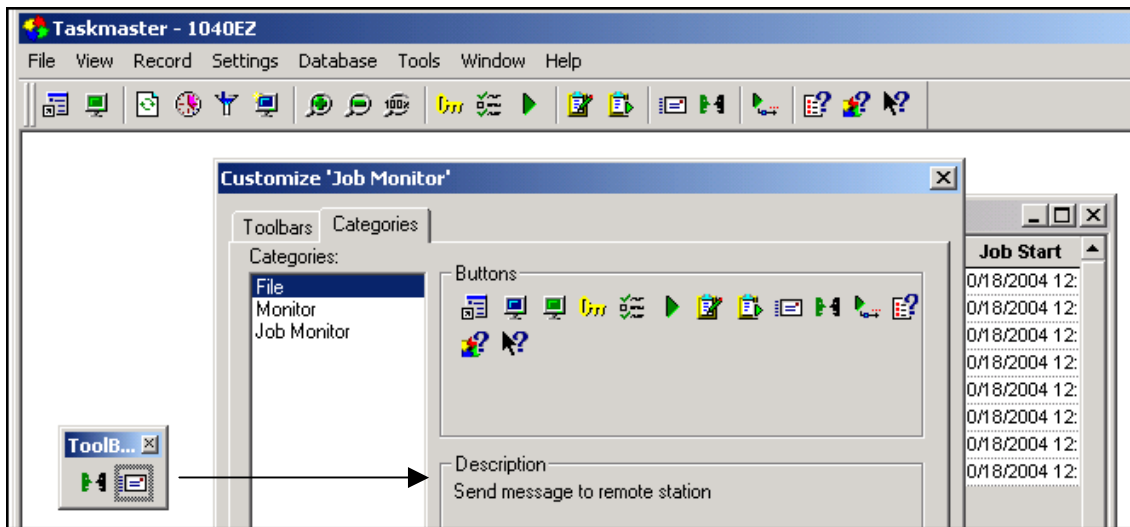
To Set up a Toolbar

To assemble a special-purpose toolbar for this Taskmaster Client, take the following steps.

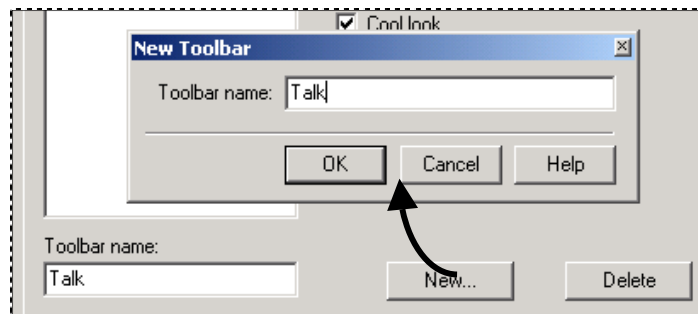
Step	Action
1.	Sign on to <i>Taskmaster</i> from this client.
2.	Decide which toolbar configuration is to include the toolbar. Perhaps, for example, the toolbar is to appear when the Data Area of the <i>Taskmaster Window</i> is empty, or when the <i>Operations</i> window is active, etc.
3.	Format the Data Area accordingly.
4.	Select Customize from the View menu: when the <i>Customize Toolbar</i> dialog appears on your screen, go to the <i>Categories</i> tab.
5.	Highlight the icon Category containing the initial icon you're going to place in the new toolbar.

To Assemble a Toolbar (continued)

- | Step | Action |
|------|---|
| 6. | Drag the icon from the category's Buttons field into the Data Area of the <i>Taskmaster Window</i> : <i>Taskmaster</i> will automatically create a toolbar with this icon in it. |
| 7. | Drag any additional icons from the Buttons field to the toolbar. |
| 8. | Return to the <i>Toolbars</i> tab: the new toolbar will be listed as <i>Toolbar(n)</i> in the Toolbars field. |
| 9. | Highlight this title and press the New button. When the <i>New Toolbar</i> dialog appears, enter the name of the toolbar and press the OK button. |



Customize Toolbar Dialog—Categories Tab



Customize Toolbar Dialog—Toolbars Tab

Taskmaster Window—Supporting Functions

The following sections describe the supporting functions of the *Taskmaster Window*, including:

Communications: e-mails and Chat Rooms within the Datacap network (below).

General Settings: modifications to *Taskmaster* default settings for database identities and Data Source Names; the length of the processing timeout period; and alternative formats for the Data Area of a client's *Taskmaster Window* (Page 63).

Database Roaming: establishing connections to alternative Engine and Admin databases (Page 82).

Job/Task Testing: testing tasks from the *Taskmaster Window* (Page 68).

Client Logs: the definition and generation of logs and log files (Page 70).

Processing on Remote Workstations: task processing on “remote” clients (Page 81).

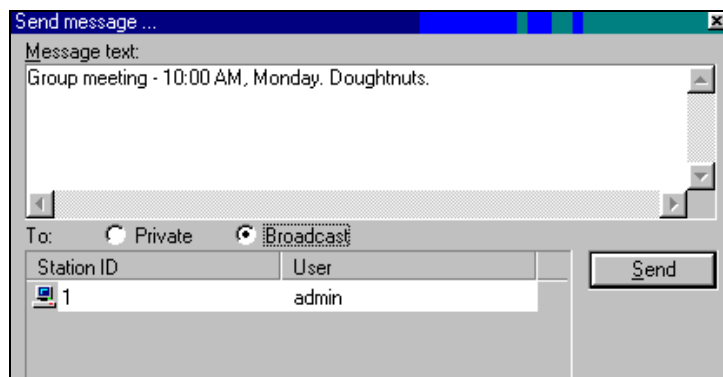
- ✓ **Very important!** These functions are “administrative privileges.” The User Definitions and User Group Definitions of individuals responsible for these procedures must include the applicable privileges. For details, see Chapter 6.

Communications

You can use the **Open Chat Window** and **Send Message** items of the **Tools** menu (or their corresponding icons) to set up communications with members of your Datacap network.

Network E-mail

To compose and send a message to one or more connected clients, select **Send Message** from the **Tools** menu (or click on the **Send Message** icon) to access the *Send Message* dialog.



Send Message Dialog

The *Send Message* dialog has these fields and settings:

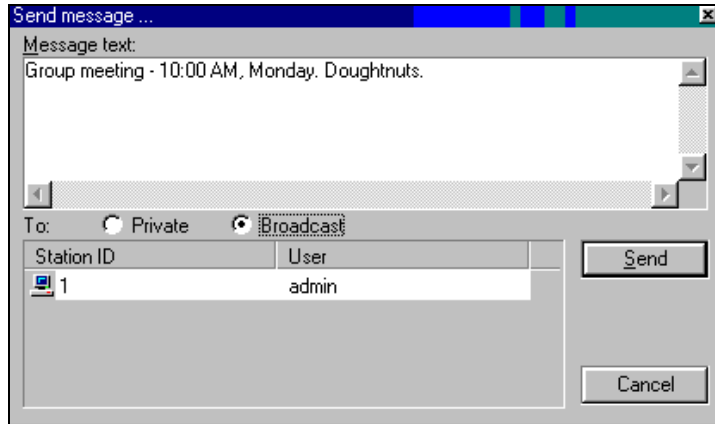
Field/Setting	Description
Message Text	The wording of a message from you to other members of the Datacap network.
To:	The recipients of the message.
Private	A radio button indicating that you will be sending the message only to Users and Stations you highlight in the list below.
Broadcast	A radio button indicating that the message is to go to all to Users and Stations in the list.
Stations/Users	A list of workstations currently connected to Taskmaster Server Service, and the users who signed on. <ul style="list-style-type: none"> • This list is for display only if you have selected the Broadcast option above. • If you choose Private, you must highlight one or more recipients in the list.
Send button	Sends the message to your audience. When the message arrives, <i>Taskmaster</i> will display it prominently on the user's screen.
Cancel button	Cancels the message and closes the <i>Message</i> dialog.

Communications

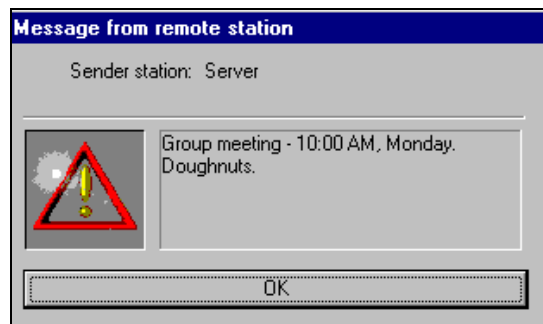
To compose and send a message, take these steps:

Step	Action
------	--------

1. Click on the **Send Message** icon or select **Send Message** from the **Tools** menu of the *Taskmaster Window*: the *Send Message* dialog will appear on your screen.



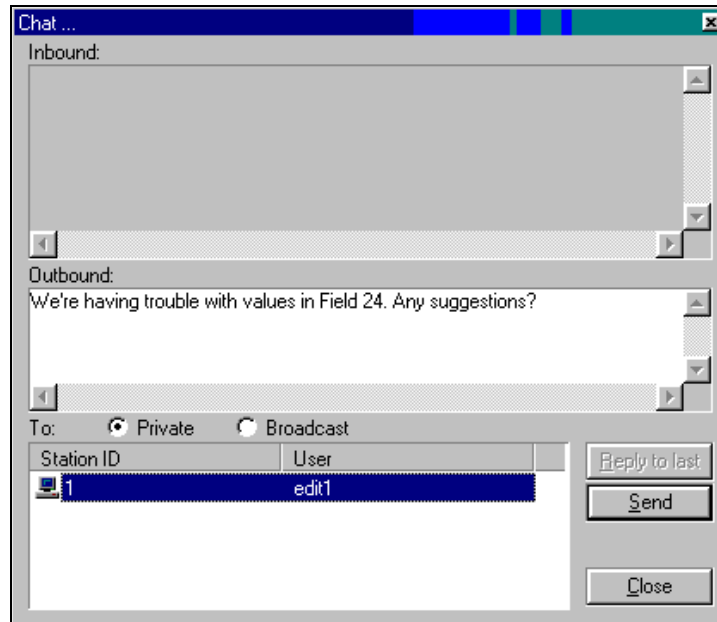
2. Enter the wording of the e-mail in the **Message Text** field.
 3. To distribute the message to all connected users, click on the **Broadcast** radio button and press the Send button. To limit distribution to one or more users, first activate the **Private** radio button. Then highlight the applicable connections.
 4. Press the Send button.
- ✓ The message will appear automatically as soon as a targeted user signs on to his or her *Taskmaster* client.



Message Alert!

Chat Rooms

The *Chat* dialog is a give-and-take bulletin board for messages between members of the network. To access this dialog, select **Chat** from the **Tools** menu or press the **Chat Room** icon on the toolbar.



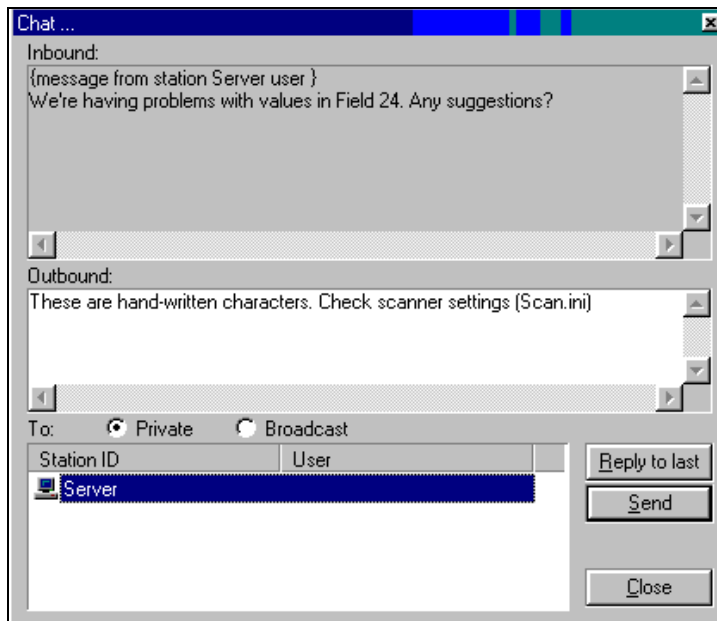
Chat Dialog—Message Mode

The *Chat* dialog has these fields and settings:

Field/Setting	Description
Inbound	Messages and comments from other participants in the Chat Room.
Outbound	The wording of a message or comment you plan to distribute.
To:	The identity and scope of your audience.
Private	A radio button indicating that you will be sending your message only to selected users and stations.
Broadcast	A radio button indicating that the message is to go to all members of the network who are involved in the Chat Room.
Stations/Users	<p>A list of workstations currently connected to Taskmaster Server Service (Chapter 2), and the users who signed on.</p> <ul style="list-style-type: none"> This list is for display only if you have selected the Broadcast option above. If you choose Private, you must highlight one or more names in the list.

Chat Room Dialog (continued)

Field/Setting	Description
Reply to Last	Sends your response directly to the issuer of the most recent message to appear in the Inbound field.
Send button	Adds your message to the Inbound field of one or more Chat Room participants.
Close button	Closes the <i>Chat</i> dialog.



Chat Dialog–Inbound/Outbound Mode

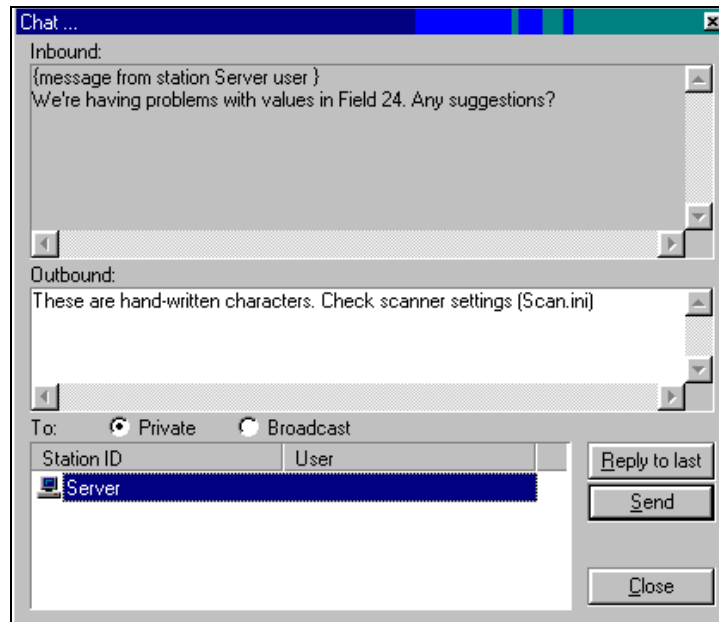
- ☛ Only authorized users can send and receive Chat Room messages (Chapter 6).

To set up and participate in a *Taskmaster* Chat Room, take these steps:

Step	Action
1.	Send a message (Page 46) to participants, announcing the Chat Room, and reminding everybody to keep their <i>Chat</i> dialogs open until the chat is over.
2.	Select Open Chat Window from the Tools menu or click on the Chat icon.
3.	When the <i>Chat</i> dialog appears on your screen, enter a message in the Outbound field.
4.	Select a Private list of Chat Room’s participants from the signed-on users and stations, or Broadcast your thoughts to everybody.
5.	Press the Send button.

To Conduct a Chat Room (continued)

Step	Action
6.	Keep the conversation open as long as comments are pertinent and appropriate.
7.	To end your participation, press the Close button.



General Taskmaster Settings

The **General** item at the bottom of the **Settings** menu (or its corresponding toolbar icon) has four sub-items—each leading to a tab of the *Taskmaster Settings* dialog:

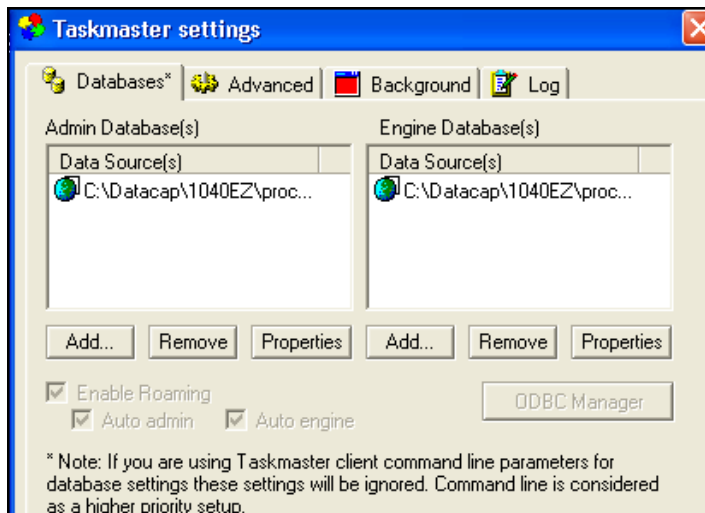
- The *Databases* tab specifies Connection Strings to the application’s Admin and Engine databases
- The *Advanced* tab controls a number of miscellaneous settings, including the time that *Taskmaster* is to wait between batches.
- The *Background* tab gives you a chance to brighten the look of the *Taskmaster Window’s* Data Area with a color or image of your choice.
- The settings of the *Log* tab determine the content and location of log tracking application events.

Taskmaster Settings Dialog: Databases Tab

The *Databases* tab of the *Taskmaster Settings* dialog is a helpful source of information about two essential “Data Sources” – the Admin and Engine databases.

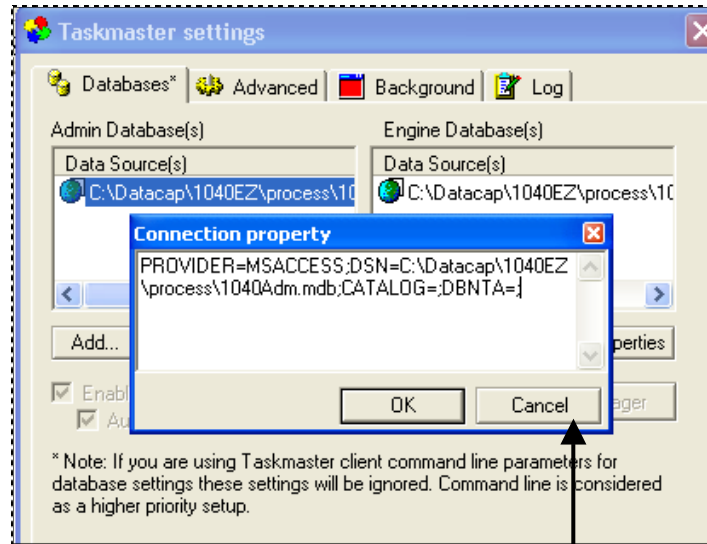
- ✓ By default, these are Access databases (.mdb). As a result, the syntax of the Data Source values in the **Data Source(s)** fields is similar to the value below. For the *1040EZ* application’s Admin database, it is the name and path of the Access database:

C:\Datacap\1040EZ\process\1040Admin.mdb



Taskmaster Settings dialog – Databases tab

If you highlight a database listing and click on the Properties button, the *Connection Property* dialog will appear (illustrated on the next page.)



Connection Property dialog

The *Connection Property* dialog will list the Connection String that will link the application's *Taskmaster* shortcut icons to this database. Here, for example, is the complete Connection String for the *1040EZ Taskmaster Client* shortcut icon (with special formatting and **bold** type for emphasis):

```
C:\Datacap\tmclient\tmclient.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=; "
```

For a complete explanation of Connection Strings, see Appendix A of the *Taskmaster Administrator's Guide*.)

- ✓ *Taskmaster* releases before *Taskmaster 6.2* use ODBC **D**ata **S**ource Names instead of Connections Strings.

When the *Taskmaster Application Wizard* generates a new application, the wizard automatically assigns a value to the Connection Property for each database, similar to the value in the illustration above. (For more about this wizard, see the *Taskmaster Application Wizard Guide*.)

Occasionally, an application relies on multiple databases – duplicate Admin or Engine databases. Under these circumstances, you'll use this tab to add the DSN Connection String portions and determine their precise roles (Page 59).

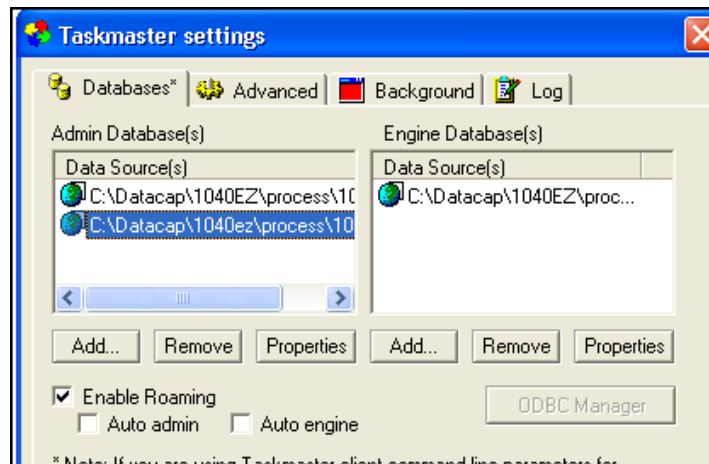
The table on the following page describes the fields and functions of this tab.

Taskmaster Settings Dialog–*Databases Tab*

Field	Description
Admin Database Area	<p>This area identifies and locates the application's Admin database, and any duplicate Admin databases available to the application for database roaming.</p> <p>The buttons in this area display the details of a particular Data Source and help you add Data Source details for a duplicate database.</p>
Data Source(s)	<p>The name and path of the application's Admin database file (.mdb).</p> <p>These values are elements of the Connection String.</p>
Add button	<p>Accesses the <i>Select Administrator Database</i> dialog (Page 56).</p> <p>You can use this dialog to add Connection String and Security parameters for a duplicate Admin database.</p>
Remove button	<p>Removes a Data Source value from the Data Sources field.</p>
Properties button	<p>Opens the <i>Connection Property</i> dialog.</p> <p>This dialog displays the Connection String property of the Data Source you've highlighted. For the 1040EZ Admin database – and Access database - for example, the value is:</p> <pre>PROVIDER=MSACCESS;DSN=C:\Datacap\1040EZ\process\1040Adm.mdb;CATALOG=;DBNTA=;</pre>
Engine Database Area	<p>This area identifies and locates the application's principal Engine database, and any other Engine databases the application can turn to.</p> <p>The fields and button in this area are the same as those of the Admin Database area (above) except that they deal with the application's Engine database rather than its Admin database.</p>

Databases Tab (continued)

Field	Description
Enable Roaming	<p>A check box, which, if activated, allows the application to switch from one Admin (or Engine) database to another.</p> <p>This check box is available only if there are multiple Data Sources in the Admin Data Source field or the Engine Data Source field.</p> <p>Very important! To manually designate an alternative database before <i>Taskmaster</i> runs, you can highlight the duplicate database and select the Admin Roam (or Engine Roam) item of the Database menu (Page 25).</p>
Auto Admin/Auto Engine	<p>A check box which, if activated, directs <i>Taskmaster</i> to switch automatically to an alternative Admin (or Engine) database.</p> <p>This is an unusual feature with limited scope: be sure to study its ramifications carefully before selecting it.</p>



Taskmaster Settings Dialog–Databases Tab
Database Roaming Enabled

Databases Tab (continued)

Field	Description
Auto Engine	<p>A check box which, if activated, directs <i>Taskmaster</i> to switch automatically to an alternative Engine database <i>if</i> the current database does not include batches awaiting processing.</p> <p>This advanced feature can distribute work for added reliability.</p>
ODBC Manager button	<p>Links you to the <i>ODBC Data Source Administrator</i>.</p> <p>This button is available only if <i>Taskmaster</i> is operating in a <i>serverless</i> mode. (For a full explanation of the role of the <i>ODBC Data Source Administrator</i>, see Chapter 2.)</p>
OK Button	<p>Confirms new or modified settings in the <i>Databases</i> tab and closes the <i>Taskmaster Settings</i> dialog.</p>
Cancel button	<p>Closes the <i>Taskmaster Settings</i> dialog.</p>

Adding Data Source Information

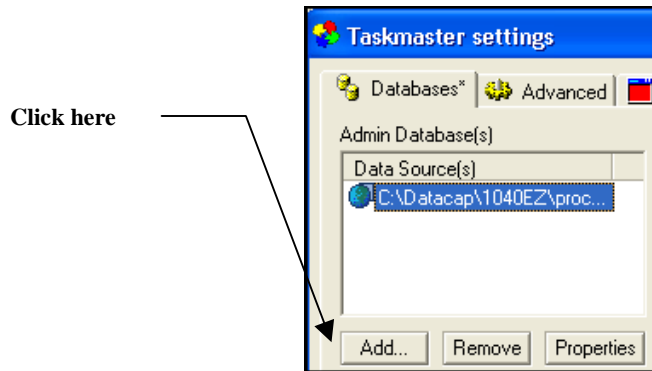
A *Taskmaster* application can access a database only if its Data Source parameters appear in the applicable **Data Source** field in the *Databases* tab, and in the *Connection Properties* dialog.

- ✓ **Very important!** You cannot add a Data Source for a second database unless:
 - Your User Definition allows you to work with additional databases and their Data Source specifications (Chapter 6).
 - The second Admin or Engine database includes a unique **index** value. Index values are in the **adminfo** table of the Admin database and the **enginfo** table of the Engine database.
 - You take the steps outlined on Page 59 to insert the Connection String portion of the second database's Data Source into the Connection String of your application's **Taskmaster Client** shortcut icon, with the correct syntax.

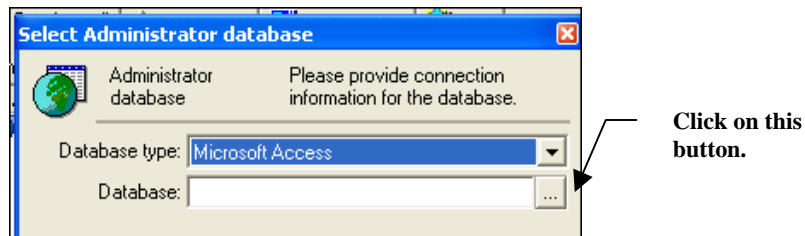
To add Data Source parameters for a second database, take these steps:

Step	Action
------	--------

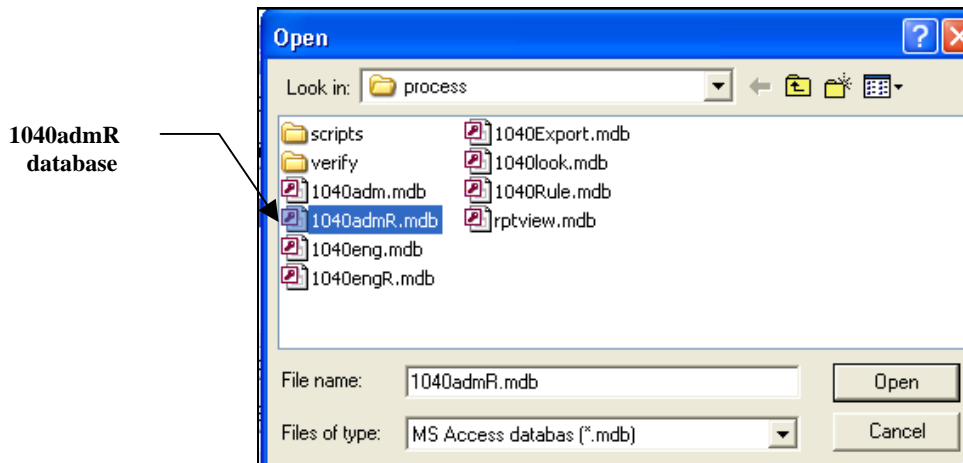
1. Press the Add button in the Engine Database or Admin Database Source area.



2. When the *Select Administrator Database* dialog appears (in this example), select the applicable **Database Type** from the drop-down list.



3. Use the Ellipsis button (...) to locate and select the database file – the *1040admR* database in the example below.

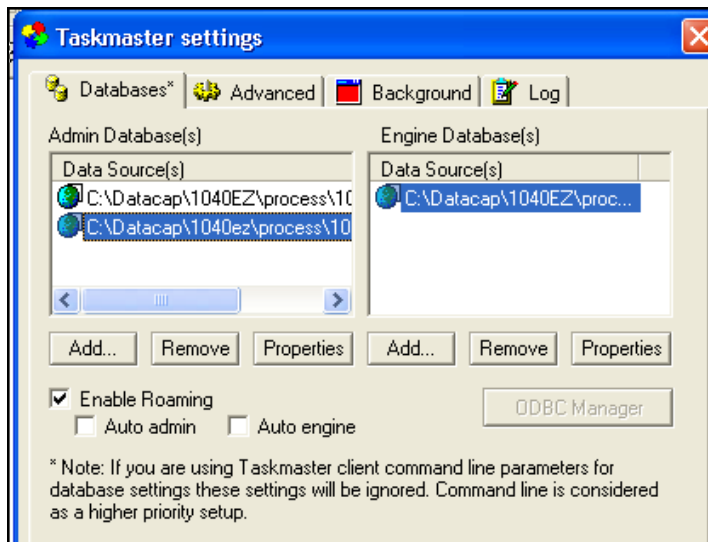


4. Press the OK button when you return to the *Select Administrator Database* dialog.

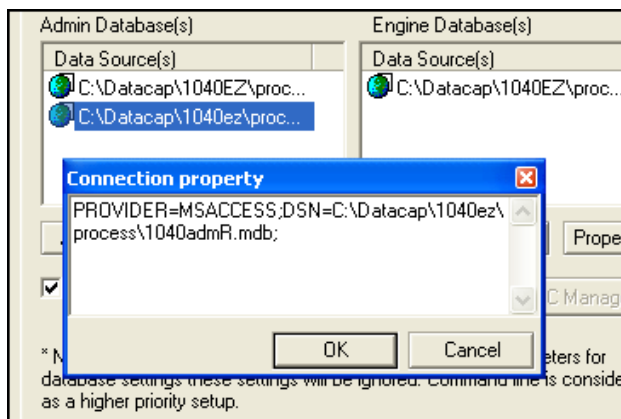
To Add Data Source Parameters for a Second Database (continued)

Step	Action
------	--------

5. Confirm that the new Data Source is listed in the **Data Source(s)** field.



6. Select the **Enable Roaming** option to test the Manual Roaming feature.
7. Close and re-open the *Taskmaster Settings* dialog.
8. Select **Admin Roam** (or **Engine Roam**) from the *Taskmaster Window's Database* menu (Page 25).
9. Highlight the new Data Source and press the **Properties** button.



10. Copy the Connection String value in the *Connection Property* dialog.

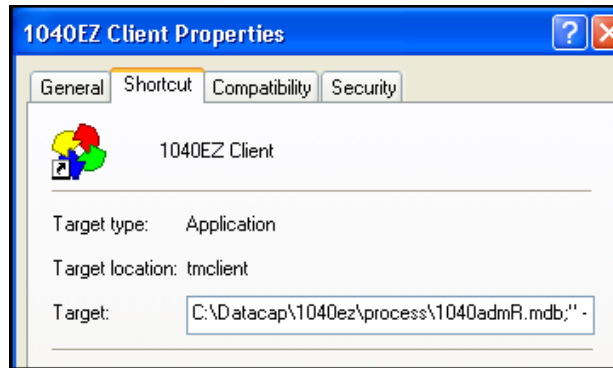
To Add Data Source Parameters for a Second Database (continued)

Step	Action
------	--------

11. Right-click on the application's **Taskmaster Client** shortcut icon.



12. Select **Properties** from the icon's options to access the *1040EZ Client Properties* dialog (in this example.)
13. Insert the new database's Data Source value into the dialog's **Target** field.



14. Close the dialog.

- ✓ Be sure to insert the Connection String portion of the database's Data Source after the Connection String for the first Admin database (in this case) but before the Connection String for the Engine database.

Below is what the icon's Connection String looks like after you add a Data Source for a second Admin database, and insert the Connection String value in the **Connection Properties** dialog – with bold type and special formatting for emphasis. Pay particular attention to comma (,) that precedes the **PROVIDER ACCESS;** parameter

New Data Source

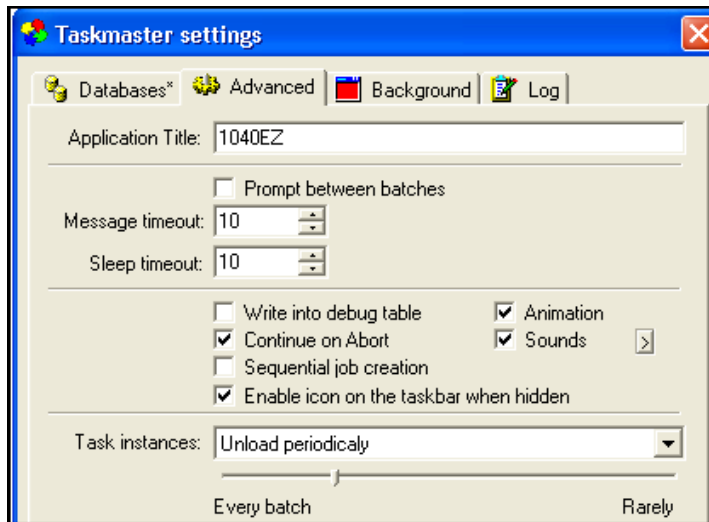
```
C:\Datacap\tmclient\tmclient.exe
-ad " PROVIDER=MSACCESS;DSN=C:\Datacap\1040EZ\process\1040Adm.mdb;
CATALOG=;DBNTA=; ,PROVIDER=MSACCESS;
DSN=C:\Datacap\1040ez\process\1040admR.mdb; "
-ed " PROVIDER=MSACCESS;DSN=C:\Datacap\1040EZ\process\1040Eng.mdb;
CATALOG=;DBNTA=; "
```

- ✓ Your application will not retain Data Sources for additional databases unless you expand the client's shortcut icon Connection String.

Taskmaster Settings Dialog: Advanced Tab

The *Advanced* tab of the *Taskmaster Settings* dialog contains important housekeeping details:

- The top section identifies the application with which the client is working.
- Items in the middle section define certain aspects of the client’s behavior as the workflow progresses.
- The lower section governs a Taskmaster Client’s behind-the-scenes operations, as well as elements of its interface with operators, Supervisors and Administrators.



Taskmaster Settings Dialog–Advanced Tab

The table below describes the fields and functions of the *Advanced* tab.

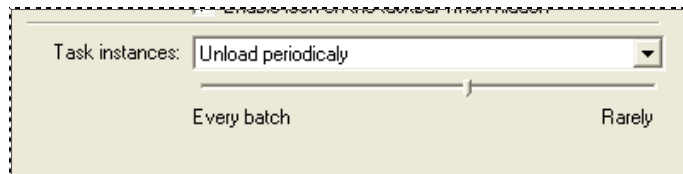
Field/Function	Description
Application Title	The name of the <i>Taskmaster</i> application that is to appear in the <i>Taskmaster Window’s</i> Title Bar.
Prompt between Batches	A check box which, if activated, directs <i>Taskmaster</i> to display an end-of-task dialog when a task finishes with a batch. These messages ask if the operator is finished with the batch (<i>OK</i> or <i>Hold</i>) and if the operator wants to continue running the same task (<i>Yes</i> or <i>No</i>).
Message Timeout	The length of the period (in seconds) that <i>Taskmaster</i> is to wait for a response, before taking the default action.
Sleep Timeout	The length of the period (in seconds) <i>Taskmaster</i> will wait before looking for a new batch to process.

Taskmaster Settings Dialog—Advanced Tab (continued)

Field/Function	Description
Write into Debug Table	A check box which, if activated, directs <i>Taskmaster</i> to save “audit” information to the Debug table of the Engine database...details of when a batch is processed, for example, or a batch status changed in <i>Job Monitor</i> from the current station.
Continue on Abort	If not checked, directs <i>Taskmaster</i> to stop further processing if the current batch aborts. If checked, directs <i>Taskmaster</i> to select and process the next batch.
Sequential Job Creation	A check box which, if activated, directs <i>Taskmaster</i> to create batches automatically for <i>unattended</i> “batch creation” tasks. This feature is only used with special tasks such as <i>Taskmaster’s</i> VScan task. Be sure to consult your Datacap Support Specialist before selecting this option.
Enable Icon on the Taskbar when Hidden	A check box which, if activated, automatically places a Taskmaster Client icon in a workstation’s Windows taskbar. This unusual response occurs if <i>Taskmaster</i> was opened by another program rather than from an icon on the user’s desktop, or selections from the Start button’s options (Page 5).
Animation	A check box which, if activated, animates the display in the <i>About Taskmaster Client</i> and <i>Session Information</i> dialogs.
Sounds	A check box which, if activated, permits the use of sound to mark various <i>Taskmaster</i> events. Pressing the > button accesses the Windows <i>Sounds</i> dialog. You can use this dialog to provide the client with audio responses.
Task Instances	Options in this drop-down list determine how and when <i>Taskmaster</i> can “unload” software objects for the tasks it runs. You must select one option.
<i>Unload if new task module</i>	Allows <i>Taskmaster</i> to unload task objects when it starts to process a task with a Task Module that’s different from the last task. In the case of the <i>1040EZ</i> application, for example, each task – VScan, PageID, Recognize and Export – employs a different module. As a result, <i>Taskmaster</i> can unload the current task’s objects as soon as it takes up another task. This decreases chances for memory leaks if the processing computer’s memory is not large enough to handle objects for all tasks.

Taskmaster Settings Dialog—Advanced Tab (continued)

Field/Function	Description
<i>Leave running</i>	Ensures that <i>Taskmaster</i> will retain components of all tasks without interruption. This can be very efficient if the application is handling just a few tasks, and memory is sufficient for the objects of all tasks.
<i>Unload periodically</i>	Uses a continuum to indicate how often <i>Taskmaster</i> should unload objects of each task. The designation of “every batch” results in maximum safety but minimum speed, and is recommended if memory leaks are possible.



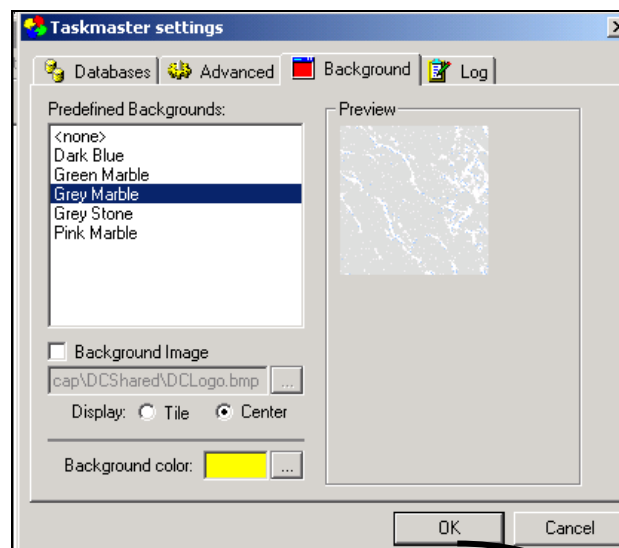
Advanced Settings – Task Instances

Taskmaster Settings Dialog: Background Tab

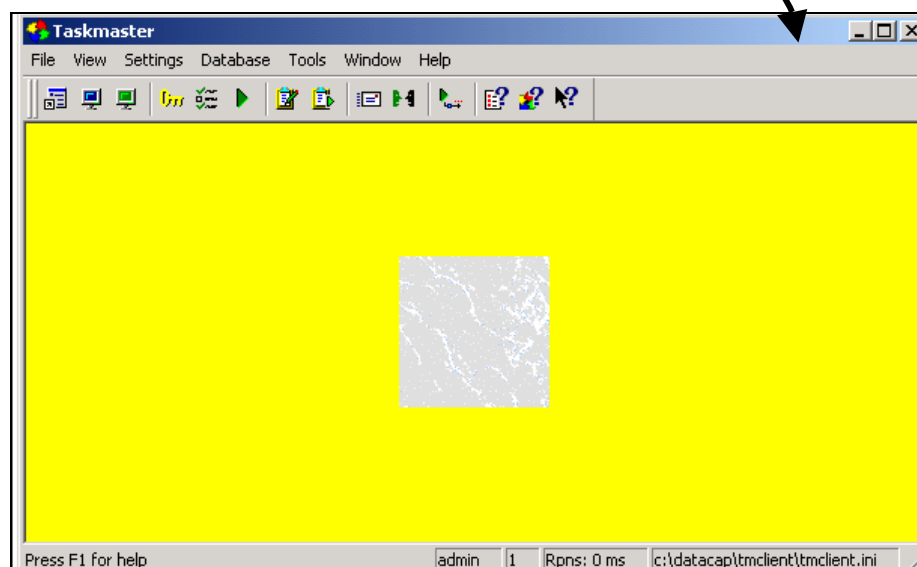
Selections in the *Background* tab can provide welcome relief from the bleak grayness of *Taskmaster's* windows and dialogs.

The tab's settings focus only on the color and texture of the *Taskmaster Window's* Data Area. However, because so much takes place in and around this dominant field, a background with more warmth or excitement can be satisfying indeed.

In the extreme example below, an operator placed a *Gray Marble* square in the *center* of a Data Area with a yellow background. (If the operator had selected the **Tile** option instead, the Gray Marble texture would cover the entire area.)



Taskmaster Settings Dialog – Background Tab



General Taskmaster Settings

The fields and functions of the *Background* tab include:

Field/Function	Description
Predefined Backgrounds	<p>Five alternative textures you can overlay on the Data Area.</p> <p>When you select a texture, it appears first in the Preview field. <i>None</i> is Taskmaster's default specification.</p>
Background Image	<p>A check box which, if selected, activates the accompanying field.</p> <p>You can use this field and the Ellipsis button (...) to specify the name and pathway of a Bitmap file (.bmp) containing an image which is to appear in the <i>Taskmaster Window's</i> Data Area. In response to your selection of a Display mode (below), <i>Taskmaster</i> will paint the image across the Data Area, or set it in the middle.</p> <p>If you select this option, the Predefined Backgrounds field is no longer available.</p>
Display	<p>Radio buttons indicating if an image or texture you select will be spread across the Data Area (Tile) or occupy a central but more limited position (Centre).</p> <p>This setting governs the placement of an image or a texture.</p>
Background Color	<p>The color of the Data Area itself.</p> <p>Clicking on the Ellipsis button accesses the <i>Colors</i> palette. You can use this dialog to review standard colors or to create your own.</p>
OK button	<p>Applies your specifications to the <i>Taskmaster Window's</i> Data Area.</p> <p>Alert! If you're unhappy with the new look, click on the General option in the Settings menu, then go right to the <i>Background</i> tab to make further changes.</p>
Cancel button	<p>Returns you to the <i>Taskmaster Window</i> without modifying the Data Area.</p>

Taskmaster Settings Dialog: Log Tab

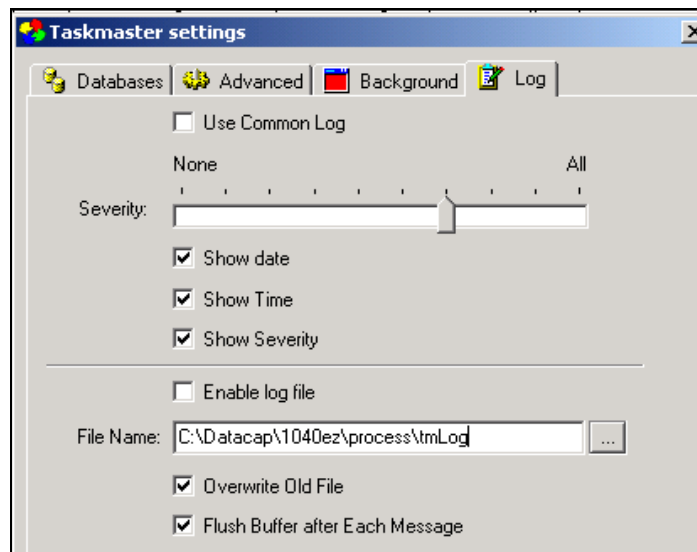
Settings in the *Log* tab of the *Taskmaster Settings* dialog govern the way a Taskmaster Client tracks, displays and stores details of its activities as part of a specific *Taskmaster* application—and as a component of a **Datacap** network.

Logs come in two forms:

- **Log Viewer** displays an up-to-the-minute, ever-changing list of events, errors and problems.
- Log files (**.log**) store log information. Specifications in the *Log* tab determine the content of logs covering a client's activity; specifications in a Task Definition's *Task Settings* dialog govern the content of a log covering a task's activity as it processes a batch (Chapter 6.)

Datacap Taskmaster Installation includes default settings for the *Log* tab of the *Taskmaster Settings* dialog. If you modify these settings, the change affects only the Taskmaster Client with which you are working.

For more about the nature, format and content of Taskmaster Client logs, see Page 70.



Taskmaster Settings Dialog—Log Tab

The table at the top of the next page describes the fields and functions of this tab. Page 70 shows you how to take full advantage of a *Taskmaster* log.

Task Settings Dialog—Log Tab

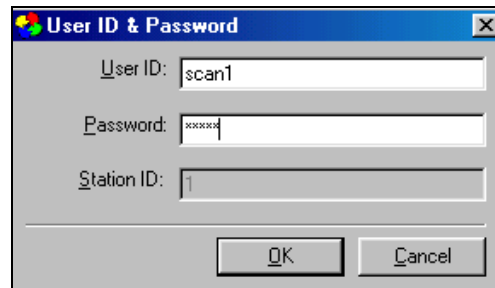
Field/Function	Description
Use Common Log	<p>A check box which, if activated, directs the client to use “shared” <i>Taskmaster</i> logging procedures.</p> <p>✓ Two important points:</p> <ul style="list-style-type: none"> • Use of the <i>common</i> log prevents you from accessing this file while the application is open and the client is active. As an alternative, you can use the <i>application</i> log options (below) to set up a file just for this application. • <i>Taskmaster</i> can update a Log file only if you have selected the Log to File item in the Tools menu, or the Enable Log File option in the <i>Log</i> tab.
Severity	<p>A pointer you use to indicate the nature of events and activities the log is to include.</p> <p>Placing the pointer at the None end of its range means the log will only record sign-in, sign-off and networking events. Moving the pointer towards All adds to the log’s scope.</p>
Show Date	A check box which, if activated, directs <i>Taskmaster</i> to include the date of a logged event or activity.
Show Time	A check box which, if activated, includes the time of a logged event or activity.
Show Severity	A check box which, if activated, includes the severity of each event or activity.
Enable Log File	<p>A check box which, if activated, directs <i>Taskmaster</i> to store log details in an <i>application</i> Log file as well as in a <i>common</i> Log file (if you have selected the Use Common Log option.)</p> <p>Maintaining an <i>application</i> Log file allows you to open the file while the client is active.</p>
File Name	The name and location of the <i>application</i> Log file.
Overwrite Old File	<p>A check box which, if activated, directs this Taskmaster Client to overwrite existing log data with new data each time the client signs on.</p> <p>This is an important option: if you do not select it, a Log file can grow quickly to an unmanageable size.</p>
Flush Buffer after Each Message	A check box which, if activated, directs <i>Taskmaster</i> to save the contents of the Log file each time a new line is added.

Signing on as a Different User

After you have signed on to an application as an Administrator, you can use the **Login** item in the **Database** menu to sign on as another user *as long as*:

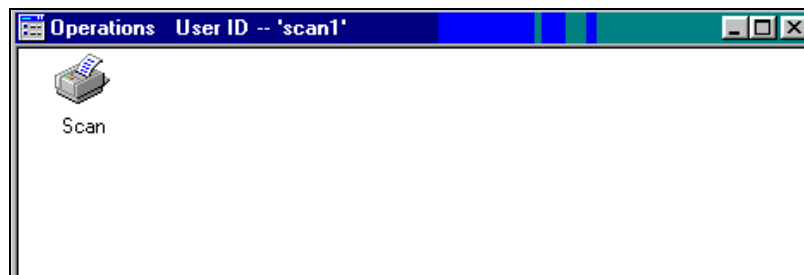
- You enter a legitimate User ID and Password (Chapter 6)
- *Taskmaster* Security has authorized the station from which you are working.

When you select **Login**, the standard *User ID & Password* dialog appears. As you can see, the **User ID** and **Password** field require entries; **Station ID**, on the other hand, is a *display* field. **Be careful**: the User ID and Password fields are case-sensitive.



User ID & Password

In the example above, if the Administrator signs on as *scan1*, a new *Taskmaster Window* appears with an updated version of the *Operations* window: instead of a full range of shortcut icons, the *Operations* window now contains just the Scan task icon. To return to the Administrator's *Operations* window, take the same steps, using your Administrative security codes.

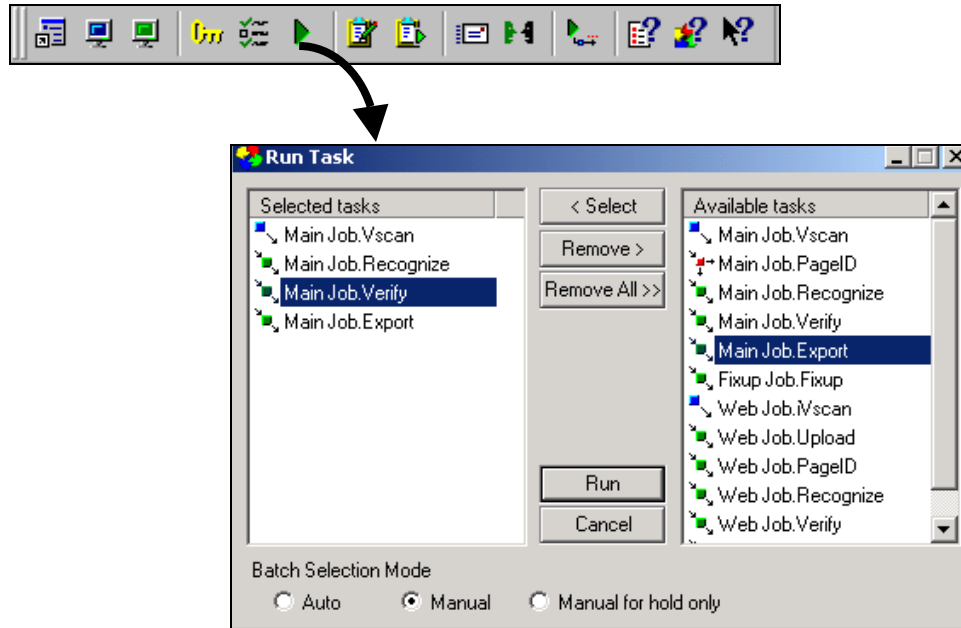


Taskmaster Window—Operations

Note: This can be a *very helpful* tool when you are setting up and testing security parameters and codes (Chapter 6).

Testing Job/Task Operations: the Run Task Dialog

All standard configurations of the *Taskmaster Window*'s toolbar include the **Run Task** icon. Pressing this icon (or selecting **Run Task** from the **Databases** menu) retrieves the *Run Task* dialog.



Run Task Dialog

The *Run Task* dialog is a tool you can use to test **Job/Task Combinations**...the jobs which make up a workflow, and the tasks assigned to those jobs.

- Highlighting a pair in the **Selected Tasks** field and pressing the Run button initiates that Job/Task Combination.
 - Your designation of a **Batch Selection Mode** determines the way in which a task will retrieve batches from its queue during testing.
- ☛ *Taskmaster* Security limits access to this icon to an application's Administrator, and to other personnel whom you authorize. For more information, see the *Taskmaster Administrator's Guide*.
- ✓ You'll use the *Workflow* tab of the *Taskmaster Administrator* to define Workflow Hierarchies consisting of workflows, jobs and tasks. Chapter 6 provides an introduction to this tab, and a review of all tabs of the *Taskmaster Administrator*. Chapter 6 of the *Guide to Taskmaster Rules* shows you how to assemble, install and test a Workflow Hierarchy.

The table below describes the fields and functions of the *Run Task* dialog.

Field/Function	Description
Selected Tasks	<p>A list of the Job/Task Combinations you intend to test.</p> <p>Each row identifies one of the application's jobs, and a task assigned to that job.</p> <p>To include a pair in the Selected Tasks list, highlight it in the Available Tasks list and press the Select button.</p>
Available Tasks	A complete list of the application's Job/Task Combinations.
< Select button	<p>Adds a Job/Task Combination you've highlighted in the Available Tasks list to the list of Selected Tasks.</p> <p>Once you take this step, the task is eligible for processing from the <i>Run Task</i> dialog.</p>
Remove > button	Removes a Job/Task Combination from the Selected Tasks list.
Remove All >> button	Removes all Job/Task Combinations from the Selected Tasks list.
Run button	Initiates processing of a task you highlight in the Selected Tasks list.
Cancel button	Closes the <i>Run Task</i> dialog.
Batch Selection Mode	These options determine how <i>Taskmaster</i> is to select a batch when you test the highlighted task.
Auto	<i>Taskmaster</i> will automatically run the next batch in the task's queue.
Manual	The Batch Selection dialog (Chapter 4) will appear as soon as you click on the Run button; <i>Taskmaster</i> will not proceed until you select a batch.
Manual for Hold Only	<p>The Batch Selection dialog will display only those batches in the queue with a "Hold" status.</p> <p>This allows an operator to review problem batches before taking action.</p>

Client Logs and Log Viewer

To test a Job/Task Combination using the **Run** icon, or the **Run Tasks** item in the **Databases** menu, take these steps:

Step	Action
1.	In the <i>Taskmaster Window</i> , press the Run icon, or select the Run Tasks item in the Databases menu: the <i>Run Task</i> dialog will appear on your screen.
2.	From the list of Available Tasks , highlight one or more Job/Task Combinations.
3.	Press the < Select button to move the listing to the Selected Tasks field.
4.	Choose a Batch Selection Mode .
5.	Highlight a Job/Task Combination in the Selected Tasks field.
6.	Press the Run button.
7.	If you have specified <i>Manual</i> as the Batch Selection Mode , choose a batch from the <i>Batch Selection</i> dialog and double-click on the listing to begin processing.

Client Logs and Log Viewer

A client log tracks a Taskmaster Client's activity.

According to specifications you supply, a log can contain minimal information about the client—messages noting sign-on and sign-off, for example—or a detailed record of events, conditions, problems and solutions.

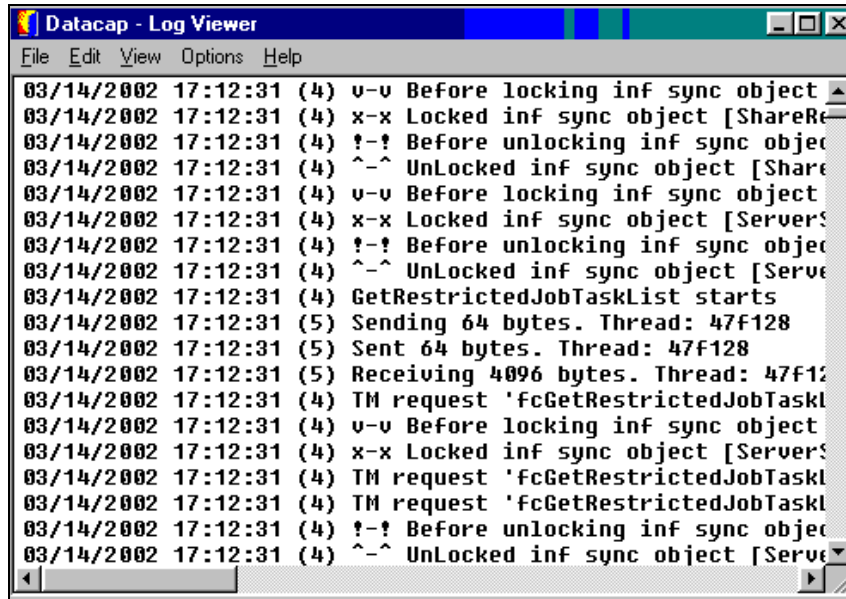
Log information comes in two forms. *Client* data deals exclusively with the client's performance, while *common* data covers the client's interaction with the *other* components of your *Taskmaster* configuration.

- ✓ **Alert!** You can set up a third type of log – a *task* log such as **scan.log**. Task logs contain details of a task's activity as it processes a particular batch and usually ends up in the batch itself. For more about these logs, see Chapter 6 of the *Guide to Taskmaster Rules*.

The *client* logs are available in two formats:

Display. The *Log Viewer* window (pictured on the next page) displays and continuously updates *client* or *common* log information.

Log file. *Taskmaster* can store log information in a *client* Log file covering the client's activity; in a *common* Log file covering the client's involvement with all system components; or in Log files of both types.

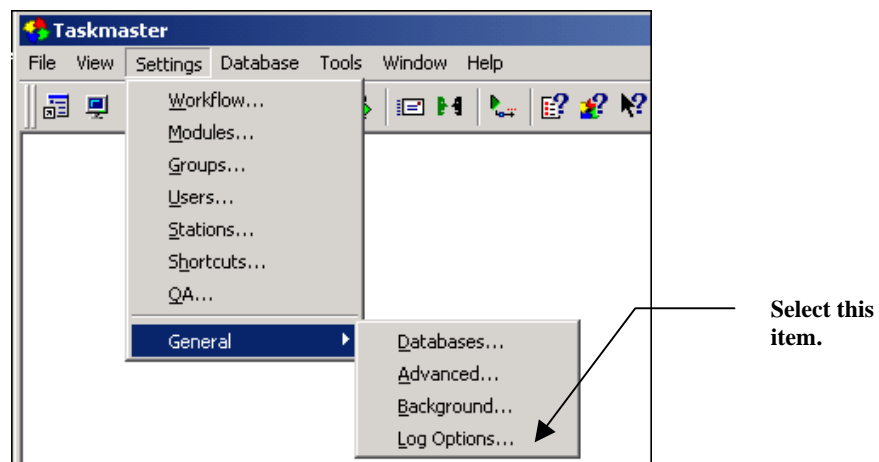


Log Viewer

The content of a log can vary substantially—again, according to specifications you supply. The simplest of logs notes when the client becomes active and when it closes down. At the other extreme are logs tracking every aspect of a client’s workflow activities and its network participation.

Client log settings are in *three* locations.

Taskmaster Window: Settings menu. If you select **General** - at the bottom of the window’s **Settings** menu - then **Log Options** from the sub-menu, the *Log* tab of the **Task Settings** dialog will appear on your screen (Page 65). You can use this tab to designate the name and location of a *client* Log file, and to indicate the scope of its content. For instructions, see Page 78.



Taskmaster Window: Tools menu. The log section of the **Tools** menu (Page 27) has two On/Off switches. Clicking on **Log Viewer** (or its corresponding toolbar icon)

opens or closes the **Log Viewer**. Clicking on **Log to File** (or its corresponding toolbar icon) directs *Taskmaster* to add information to the *client* Log file you identified in the *Log Options* tab of the *Taskmaster Settings* dialog. Clicking again limits the file's contents to a record of events up until the client closed.

Log Viewer: Options menu. Settings accessible from the **Log Viewer** establish a *common* Log file and determine its contents. For details, see Page 79.

Log Viewer–Menus

The **Log Viewer** window displays current, up-to-the-minute log information. To activate this window, select **Log Viewer** from the **Tools** menu or click on the **Log Viewer** icon.

Information in the Data Area dominates this window. Nevertheless, the **Log Viewer's** menus contribute measurably to its effectiveness. The following table describes the items in these menus.

Menus of the Log Viewer

Item	Keyboard	Description
File		These items transfer Log Viewer data to a <i>client</i> Log file, and close this window.
Save as	Alt + S	Opens the <i>Save Log as</i> dialog. As a default, <i>Taskmaster</i> lists the file you designated in the <i>Log Options</i> tab of the <i>Taskmaster Settings</i> dialog (Page 65).
Save Selection	<i>n/a</i>	Opens the <i>Save Log as</i> dialog. This item allows you to add specific lines in the Log Viewer's Data Area to a <i>client</i> Log file you specify.
Exit	Alt + X	Closes the Log Viewer .
Edit		These items locate and process specific listings.
Copy	Ctrl + C	Copies selected lines in the Log Viewer's Data Area.
Select All	Ctrl + A	Selects all data currently displayed in the Log Viewer .
Undo Selection	<i>n/a</i>	Releases highlighted listings.
Clear Log	<i>n/a</i>	Deletes all current listings in the Log Viewer's Data Area.
Find	Ctrl + F	Retrieves the <i>Find Text</i> dialog and gives you the ability to search the Log Viewer's listings.
View		Checking an item in this menu adds a particular specification to each listing in the Log Viewer's Data Area.

Log Viewer Menus – (continued)

Item	Keyboard	Description
Show Date	<i>n/a</i>	Includes the dates of the events, errors and conditions listed in the <i>Log Viewer's</i> Data Area.
Show Time	<i>n/a</i>	Includes the time of each event, error or condition listed in the <i>Log Viewer's</i> Data Area.
App ID	<i>n/a</i>	Displays the identifying codes of the <i>Taskmaster</i> applications generating listings in the <i>Log Viewer</i> .
Severity	<i>n/a</i>	Displays a code ranking the “severity” of each event, error or condition listed in the <i>Log Viewer</i> . These codes range from “0” (<i>No Ranking</i>) to “9” (<i>Most Severe</i>). They measure the <i>importance and impact</i> of a listing rather than the nature of any related problems.
Message ID	<i>n/a</i>	Displays the identifying code <i>Taskmaster</i> assigns to each <i>Log Viewer</i> listing.
Autoscroll	<i>n/a</i>	Automatically displays the <i>Log Viewer's</i> most recent listings in its Data Area. Alert! This is a convenient tool if you are interested in late-breaking developments, but an annoyance if you're trying to concentrate on a specific listing. Be sure to turn off Autoscroll when you conducting a search or reviewing results.
Status Bar	<i>n/a</i>	Displays or hides a Status Bar.
Options		Items in this menu determine just how you're going to use the <i>Log Viewer</i> —and distribute its data.
Common Log File	<i>n/a</i>	Accesses the <i>Common Log File</i> dialog. You can use this dialog to set up a temporary channel connecting the <i>Log Viewer</i> to a <i>common</i> Log file. Then, if you activate the Write to Log File option (below), <i>Taskmaster</i> will extract data from the <i>Log Viewer</i> and place it in the Log file. Alert! When the <i>Log Viewer</i> closes, the channel closes. When the <i>Log Viewer</i> re-opens, the channel remains closed. For more about <i>common</i> Log files, see Page 79.
Write to Log File	<i>n/a</i>	Directs <i>Taskmaster</i> to copy data from the <i>Log Viewer</i> to a Log file you designated using this menu's Common Log File procedures (above.)

Log Viewer Menus – (continued)

Item	Keyboard	Description
<i>Log Content options</i>		The options below determine the <i>Log Viewer's</i> content. You <i>must</i> select one.
Full Log	<i>n/a</i>	Displays a complete set of log data, generated to comply with your selections from the View menu (above).
Filter Log	<i>n/a</i>	Displays log data that's been filtered according to parameters you provide using the Filter Options item (below).
Processes	<i>n/a</i>	Limits the log data to a list of executable files (.exe) that are the sources of the <i>Log Viewer's</i> information.
Filter Options	<i>n/a</i>	Accesses the <i>Log Filter</i> dialog. You'll use this dialog to enter parameters for a filtered log. This option is available <i>only</i> if you have selected Filter Log above.
Help	<i>n/a</i>	Displays <i>About Log Viewer</i> information.

The screenshot shows the Datacap Log Viewer application window. The title bar reads "Datacap - Log Viewer". The menu bar includes "File", "Edit", "View", "Options", and "Help". The main display area contains a list of log entries with the following columns: Date/Time, PID, Severity, Message Type, and Message. The entries are as follows:

```

03/14/2002 17:24:02 0400 (4) x-x Locked inf sync object [ServerShare
03/14/2002 17:24:02 0416 (4) !-! Before unlocking inf sync object [S
03/14/2002 17:24:02 0418 (4) ^-^ UnLocked inf sync object [ServerSha
03/14/2002 17:24:03 0396 (4) v-v Before locking inf sync object [Ser
03/14/2002 17:24:03 0400 (4) x-x Locked inf sync object [ServerShare
03/14/2002 17:24:03 0416 (4) !-! Before unlocking inf sync object [S
03/14/2002 17:24:03 0418 (4) ^-^ UnLocked inf sync object [ServerSha
03/14/2002 17:24:04 0396 (4) v-v Before locking inf sync object [Ser
03/14/2002 17:24:04 0400 (4) x-x Locked inf sync object [ServerShare
03/14/2002 17:24:04 0416 (4) !-! Before unlocking inf sync object [S
03/14/2002 17:24:04 0418 (4) ^-^ UnLocked inf sync object [ServerSha
03/14/2002 17:24:05 0396 (4) v-v Before locking inf sync object [Ser
03/14/2002 17:24:05 0400 (4) x-x Locked inf sync object [ServerShare
03/14/2002 17:24:05 0416 (4) !-! Before unlocking inf sync object [S
03/14/2002 17:24:05 0418 (4) ^-^ UnLocked inf sync object [ServerSha
03/14/2002 17:24:06 0396 (4) v-v Before locking inf sync object [Ser
03/14/2002 17:24:06 0400 (4) x-x Locked inf sync object [ServerShare
03/14/2002 17:24:06 0416 (4) !-! Before unlocking inf sync object [S
03/14/2002 17:24:06 0418 (4) ^-^ UnLocked inf sync object [ServerSha

```

**Log Viewer, showing
Time, Message Type, Severity, Message**

Log Viewer Filters

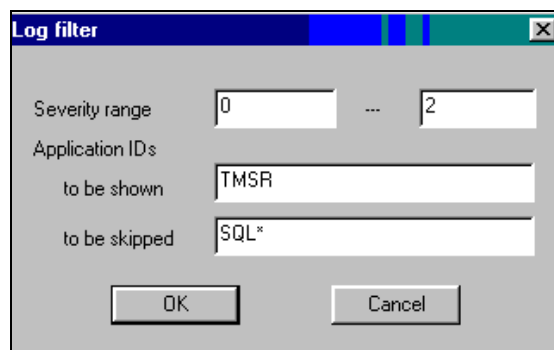
The *Log Viewer's* filtering mechanism accepts two parameters:

- You can specify the severity of events and conditions to be reported.
- You can include (and exclude!) messages generated by certain types of activities, and designated according to their Application IDs.

As a preliminary step, take these steps to get a list showing all messages, with their Severity Codes and Application IDs prominently displayed:

Step	Action
1.	From the Options menu of the <i>Taskmaster Window</i> , select Log Viewer ; the <i>Log Viewer</i> window will appear on your screen.
2.	In the View menu, turn off Autoscroll .
3.	Select Full Log from the Options menu.
4.	From the View menu, select App ID and Severity .
5.	As you scroll through the messages, decide which Application IDs and Severity Codes are to serve as the filter's criteria.

To filter the messages in the *Log Viewer's* Data Area, select **Filtered Log** from the **Options** menu. This will activate the *Filter Options* item at the bottom of the menu. Select this item to access the *Log Filter* dialog:



Log Filter Dialog

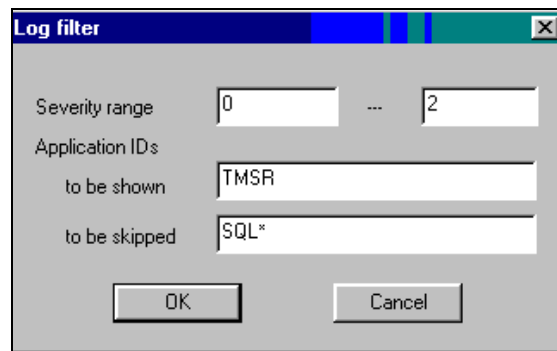
The *Log Filter* dialog has these fields:

Field/Function	Description
Severity Range	Severity Codes defining a From...To range. The <i>Log Viewer</i> automatically covers all events, conditions and errors within the scope you defined in the <i>Log Options</i> tab of the <i>Taskmaster Settings</i> dialog (Page 65). To limit this coverage, enter an integer between “0” and “9” in both fields.
Application IDs	A list of the Application IDs representing <i>Taskmaster</i> applications.
...to be shown	Directs the <i>Log Viewer</i> to include only those messages generated by applications you designate in this field. To specify multiple applications, separate each code with a comma.
...to be skipped.	Directs the <i>Log Viewer</i> to exclude certain applications.
OK button	Confirms the filtering criteria you’ve entered, closes this dialog, and updates the <i>Log Viewer</i> with filtered information.
Cancel button	Closes this dialog and returns you to the <i>Log Viewer</i> .

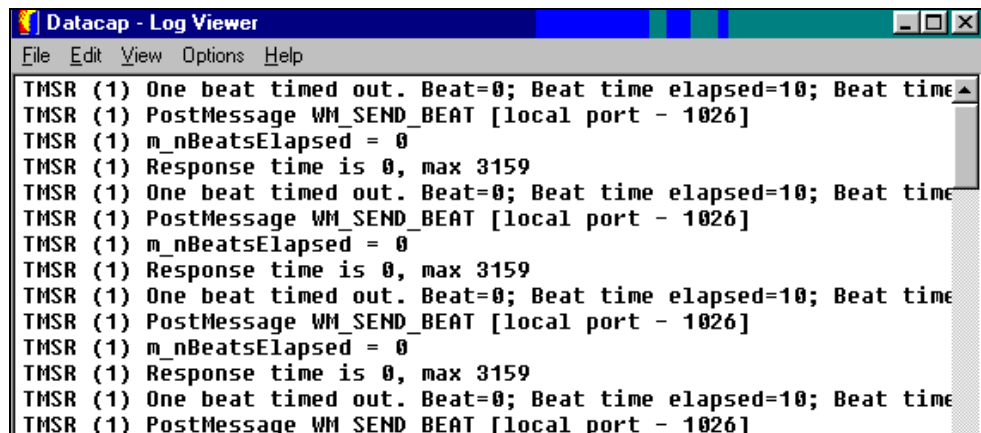
Log Viewer Displays

To generate and display *Log Viewer* information, take these steps:

- | Step | Action |
|------|--|
| 1. | From the Options menu of the <i>Taskmaster Window</i> , select Log Viewer ; the <i>Log Viewer</i> window will appear on your screen. |
| 2. | Select Full Log from the <i>Log Viewer's Options</i> menu. |
| 3. | Choose specific items from the View menu to determine the <i>Log Viewer's content</i> . |
| 4. | To filter a listing, select Filtered Log from the Options menu: click on Filter Options to access the <i>Log Filter</i> dialog. |



5. Enter your filtering criteria and press the OK button.



Filtered Log

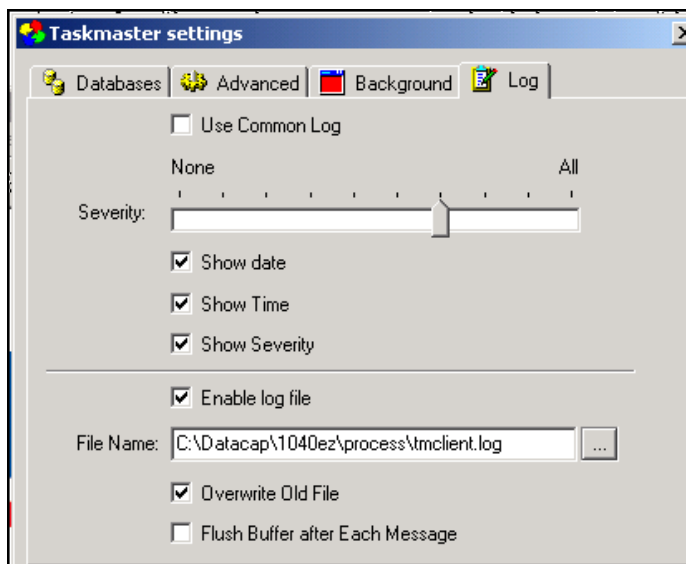
Client Log Files

You can use the facilities of the *Taskmaster Window* to create and maintain two types of **Log files**:

- A *client* Log file records messages associated with the activity of the Taskmaster Client.
- The more comprehensive, *common* Log file adds messages about the client's relationships with other components of a **Datacap** configuration.

Procedures for setting up a *common* Log file are on Page 79. To define a *client* Log file:

Step	Action
1.	Open the <i>Taskmaster Window</i> .
2.	Select General from the Settings menu, then Log Options : the <i>Log</i> tab of the <i>Taskmaster Settings</i> dialog will appear on your screen.



3. Do *not* select **Use Common Log**.
4. Indicate the **Severity** of the events and conditions the log is to track.
5. Indicate if messages are to include **Dates**, Times and **Severity** codes.
6. Check the **Enable Log File** option: enter the **File Name** and location.
7. If *Taskmaster* is to overwrite previously log data whenever you sign on, select **Overwrite Old File**.
8. If *Taskmaster* is to clear memory after each message, activate **Flush Buffer**.
9. Press the OK button.

Common Log Files

Defining and generating a *common* Log file is a process that takes place in two phases. The first phase authorizes the use of a *common* Log file; the second phase supplies additional criteria for the log's contents and its generation.

A Word of Caution. Defining and generating a *common* Log file is a temporary venture. The file's definition unravels, and the file closes, as soon as you turn off the **Log Viewer**.

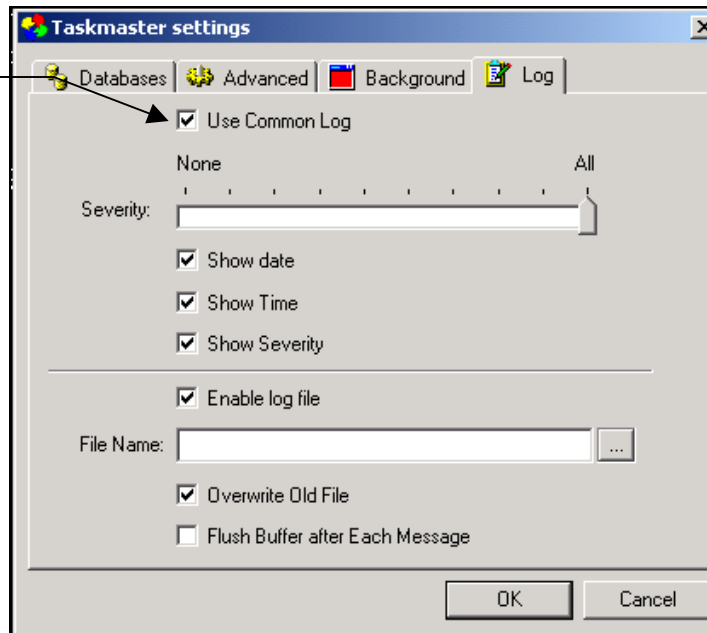
Phase 1: Authorizing a Common Log

Take steps to authorize the creation of a *common* Log file.

Step	Action
------	--------

1. Open the *Taskmaster Window*.
2. Select **General** from the **Settings** menu, then **Log Options**: the *Log* tab of the *Taskmaster Settings* dialog will appear on your screen.

Select this option.

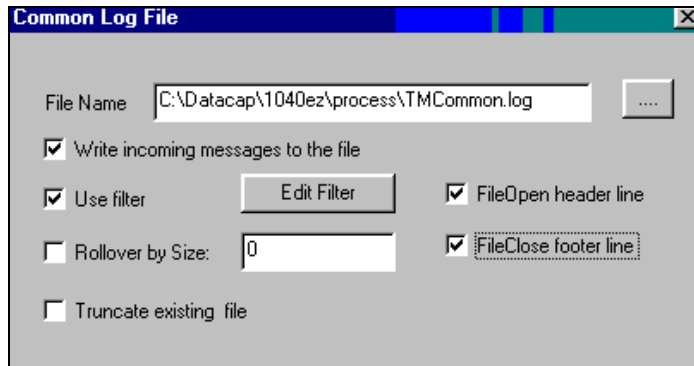


3. Select the **Use Common Log** option.
4. Indicate the **Severity** of the events and conditions the *common* log is to track.
5. Indicate if the file's listings are to note **Date**, **Time** and **Severity**.
6. Select the **Enable Log File** but do *not* enter a **File Name** (you'll add the File in Phase 2.)
7. Turn on the **Log to File** option in the **Tools** menu of the *Taskmaster Window*.

Phase 2: Common Log Specifications

To begin this phase, select **Log Viewer** from the **Tools** menu. When the *Log Viewer* appears, select **Common Log File** from the **Options** menu to access the *Common Log File* dialog.

You'll use the settings in this dialog to provide the file with the additional specifications described in the table below.



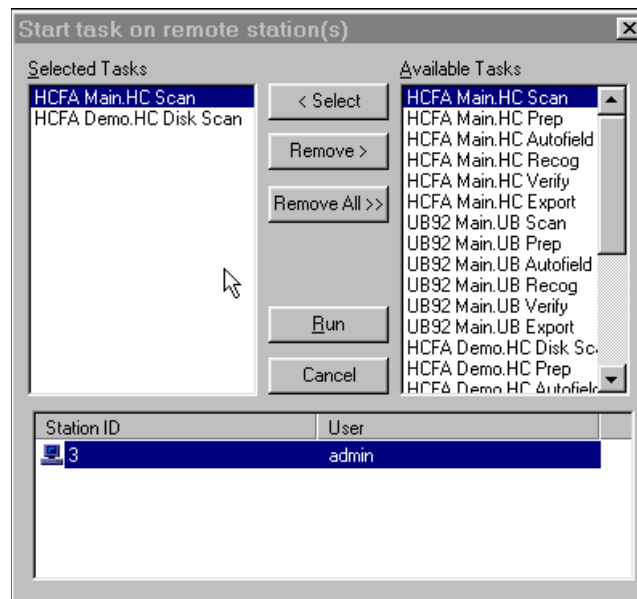
Common Log File Dialog

Setting	Description
File Name	The name and location of the <i>common</i> Log file. This is a <i>required</i> entry.
Write incoming messages to the file	A check box which, if activated, adds information about events and activities to the Log file.
Use Filter	Directs <i>Taskmaster</i> to employ the filtering criteria in the <i>Log Filter</i> dialog when generating the file. To access the <i>Log Filter</i> dialog, press the Edit Filter button. The settings in this dialog are identical to those described on Page 75.
Rollover by Size	A check box which, if activated, directs <i>Taskmaster</i> to close the file after it reaches a size indicated in the accompanying field. <i>Taskmaster</i> will rename the file, and open a new file with the original name.
Truncate Existing File	A check box which, if activated, directs <i>Taskmaster</i> to erase the contents of the existing log before starting a new log.
FileOpen Header Line	A check box which, if activated, directs <i>Taskmaster</i> to add a “header” line to the beginning of the log.
FileClose Header Line	A check box which, if activated, directs <i>Taskmaster</i> to add a “footer” line to the end of the log.

Processing on Remote Workstations

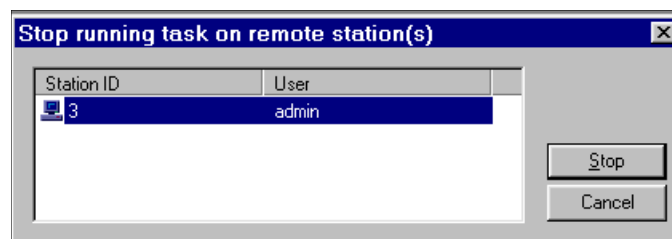
If multiple Taskmaster Clients are active on the **Datacap** network, you can run a task on a client *other than your own* if you have previously provided the client and workstation with proper authorization (Chapter 6).

To run a task on another client, select **Start Task from Remote Station** from the **Tools** menu. From the list in the **Station ID/User** field of the dialog, select the remote Taskmaster Client (in the example, there is only one additional client). Then place the applicable Job/Task Combinations in the **Selected Tasks** field. Press the Run button to initiate the task(s).



Start Task on Remote Station Dialog

To terminate processing, select **Stop Running from Remote Station**. When the *Stop Running* dialog appears, select the client and press the Stop button.



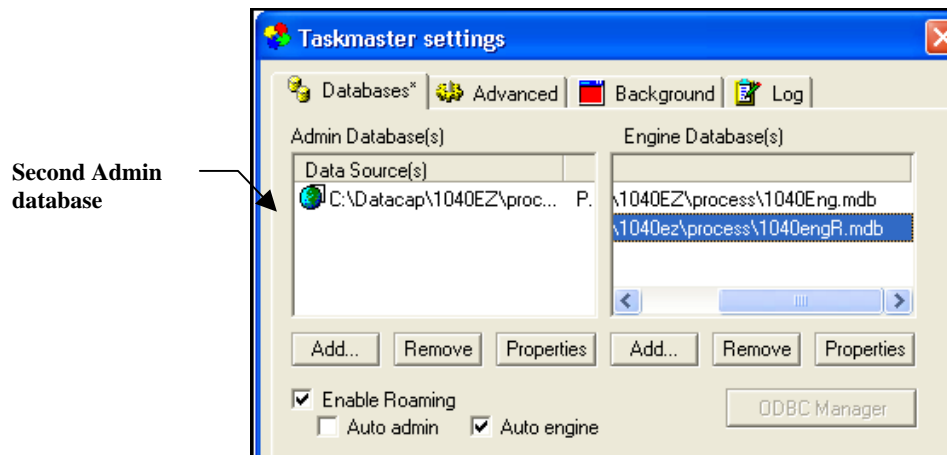
Stop Running Task on Remote Station

Follow the same procedures to **Shut Down a Remote Station**.

Database Roaming

An application that employs **database roaming** can move between multiple Engine databases and Admin databases as it creates, selects and processes batches. This can be a highly efficient procedure if the workflow's Scan task runs more than one scanner, and each scanner places batches in a different location.

In the example below, the Administrator has set up a subsidiary Engine database and provided it with a Data Source (Page 56): **1040engR** contains backup batch processing details. (This feature typically roams between Engine databases.)



Taskmaster Settings Dialog – Databases Tab

The **Enable Roaming** option becomes available only if there is more than one listing in the **Admin Database(s)** or the **Engine Database(s)** field of the *Databases* tab.

- ✓ Defining, testing and implementing database roaming requires a good deal of planning. Before you begin...
 - Review descriptions Database Roaming parameters and requirements on Page 52.
 - Consult your Datacap Implementation Specialist..