
Processing Windows & Dialogs

Chapter 4 explores the tools that *Taskmaster* provides to those responsible for processing a workflow's Job/Task Combinations. Most are components or adjuncts of the *Taskmaster Window* when *Taskmaster* is in its *operating* mode (Chapter 3).

After a review of the *Taskmaster* Workflow Hierarchy and its components, Chapter 4 examines the role of the following windows and dialogs as they carry out job and task operations:

Operations window. The shortcut icons in this window initiate the operations of a workflow's Job/Task Combinations. In response to settings the Administrator provides (Chapter 6), a shortcut icon can initiate one combination, or multiple combinations.

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

StartBatch panel. The Scan task operator is responsible for entering essential batch information in the fields of this panel. Although *Taskmaster* supplies the **StartBatch** panel without default fields and specifications, an Administrator can modify these defaults to meet the needs of a particular application.

Batch End dialog. The **Batch End** dialog appears automatically after the Scan task has created and processed a batch. This versatile tool provides information about the contents of the new batch, and gives the Scan operator a chance to review the images of scanned pages.

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

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

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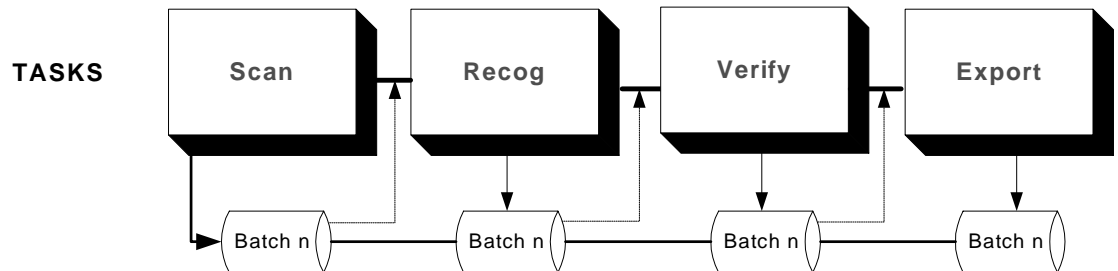
Menus of the Operations Window

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APPLICATION: MyForm

WORKFLOW: Single

JOB: Main

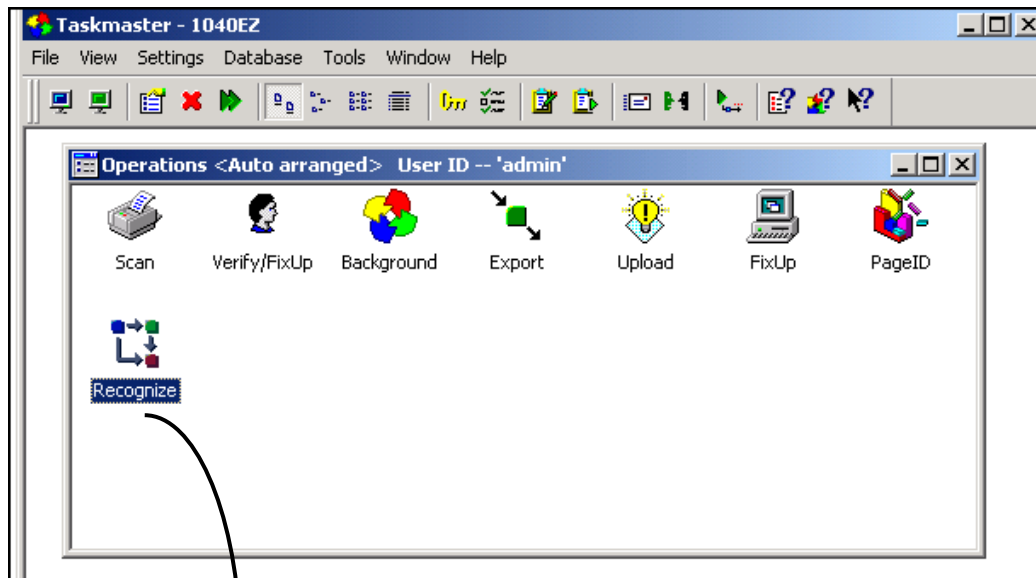


Introduction

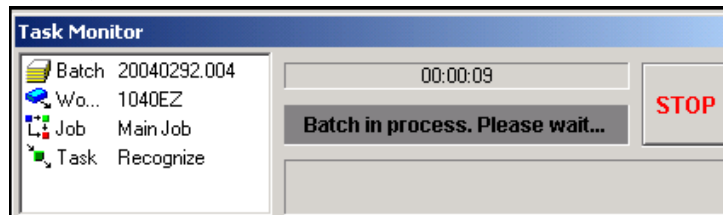
Below is the *Taskmaster Window* as it might appear while processing the jobs and tasks of an application's workflow—in this case, the jobs and tasks of the *1040EZ* application.

As you can see, every menu is active...each toolbar icon is instantly available.

In these circumstances, the *Operations* window displays eight Job-Task shortcut icons. These shortcuts lead to *1040EZ* jobs and tasks that are ready to process batches.



Taskmaster Window—with Operations window

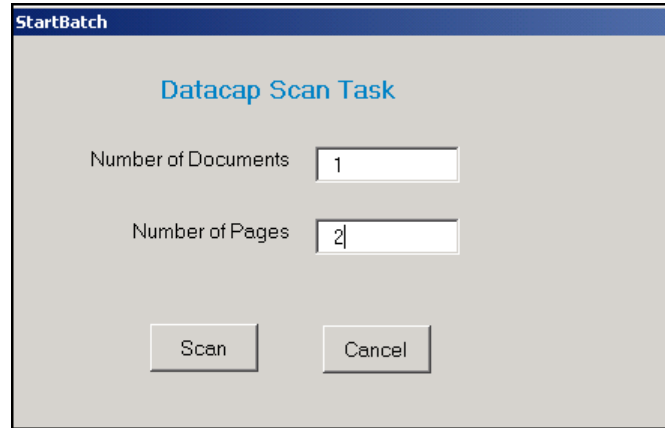


Task Monitor – Recognition task

Outside the limits of the *Taskmaster Window*, the *Task Monitor* provides up-to-the-second information about the task's status as it processes the current batch.

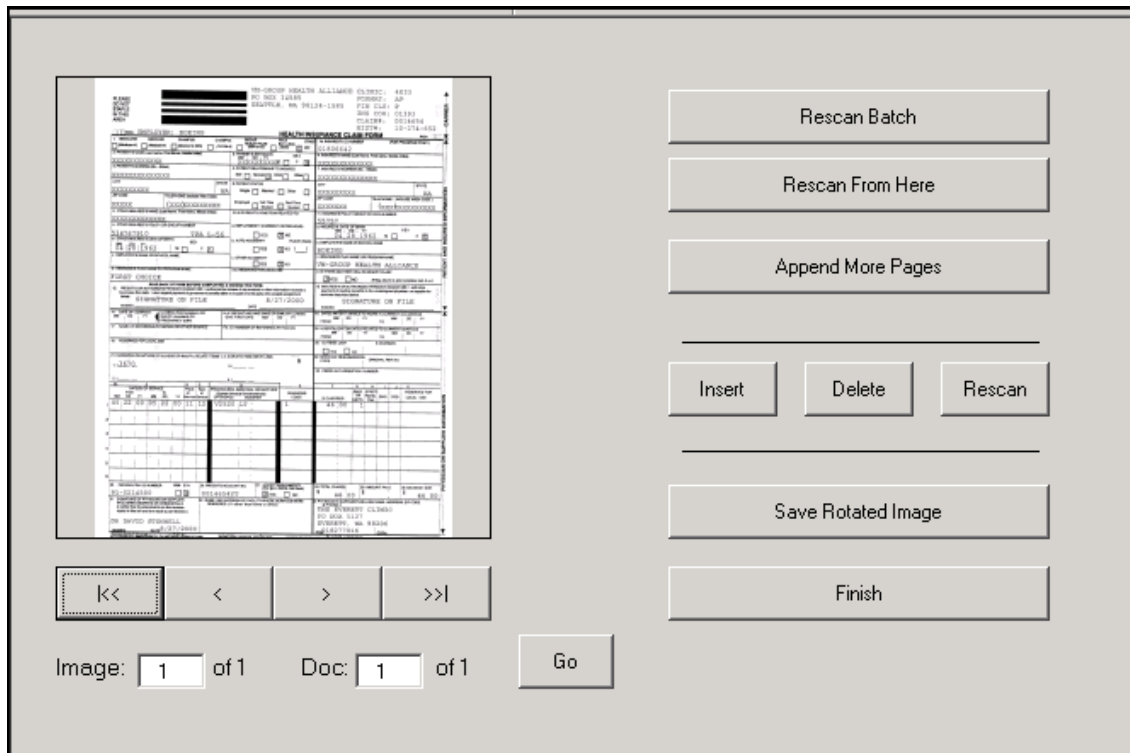
Other windows and dialogs supply important operating data, or solicit your responses to processing events. Most Scan tasks involving physical scanners, for example, use specialty dialogs to ask the task's operator for an estimate of documents and pages in the batch – and to give the operator a chance to review – and perhaps rescan - the images in the batch (see the illustrations on the next page.)

Menus of the Operations Window



The StartBatch dialog box has a blue title bar with the text "StartBatch". Below the title bar, the text "Datacap Scan Task" is centered. There are two input fields: "Number of Documents" with the value "1" and "Number of Pages" with the value "2". At the bottom, there are two buttons: "Scan" and "Cancel".

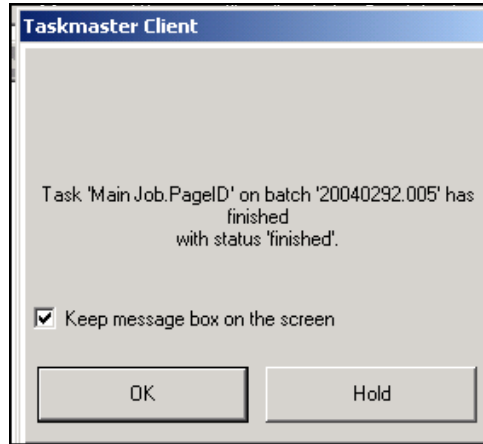
StartBatch Panel



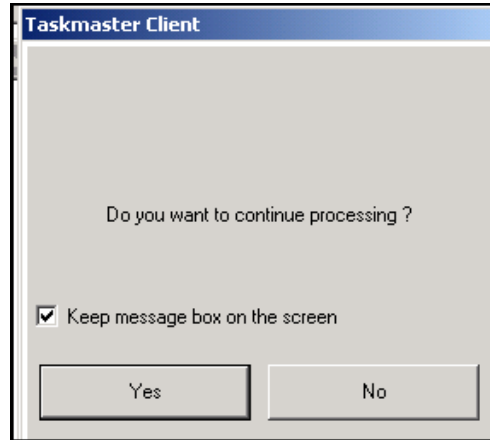
The Scan Task Review - IsScan Task panel displays a scanned document on the left. The document is a form with various fields and a table. On the right side of the panel, there are several buttons: "Rescan Batch", "Rescan From Here", "Append More Pages", "Insert", "Delete", "Rescan", "Save Rotated Image", and "Finish". At the bottom left, there are navigation buttons: "K<<", "<", ">", and ">>|". Below these buttons, there are two input fields: "Image: 1 of 1" and "Doc: 1 of 1", followed by a "Go" button.

Scan Task Review - IsScan Task

And nearly every task concludes with a brief “batch-finished” announcement and a question about upcoming processing steps.



Task Finished!

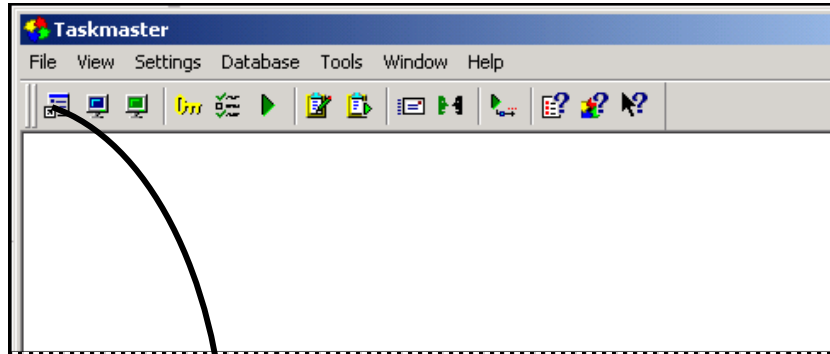


Continue Processing?

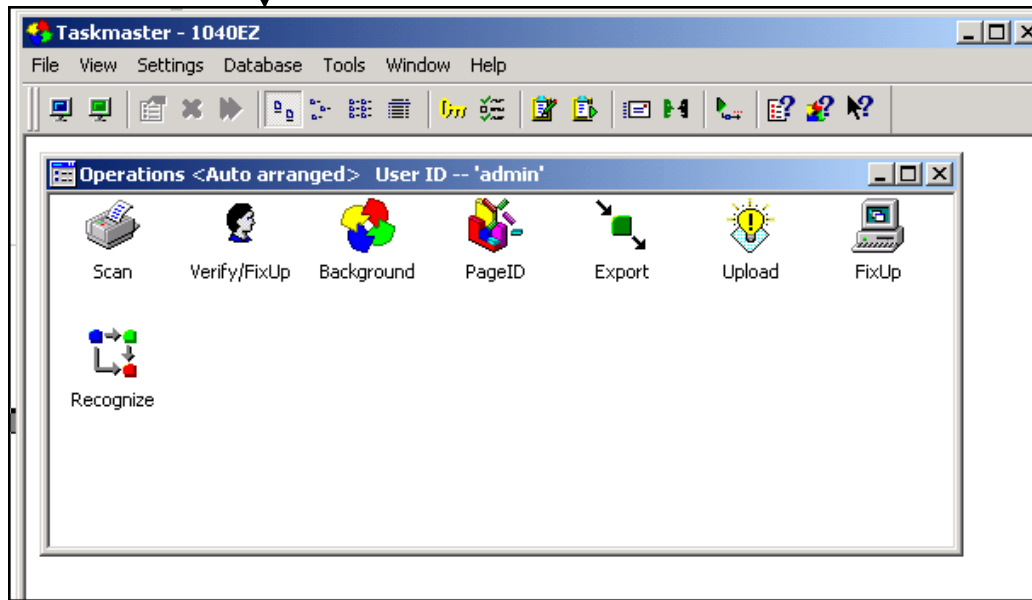
Chapter 4 examines the role of the *Operations* window, and the other windows and dialogs which are active when *Taskmaster* is in its *operating* mode. (Chapter 5 investigates details of the supervisory *Job Monitor* and *Station Monitor*.)

Operations Window

When the *Taskmaster Window* is empty, the toolbar's first icon retrieves the *Operations* window and places it squarely within the Data Area.



Taskmaster Window—empty



Taskmaster Window—with Operations Window

However, when you first sign-on to *Taskmaster*, the *Operations* window appears automatically, and the toolbar hides the icon.

- ✓ **Don't forget!** Most illustrations in this text come from the *1040EZ* training application. The content of the *Operations* window will differ from one application to the next; the content of *your* application's *Operations* window may differ significantly.

The *Operations* window has these components:

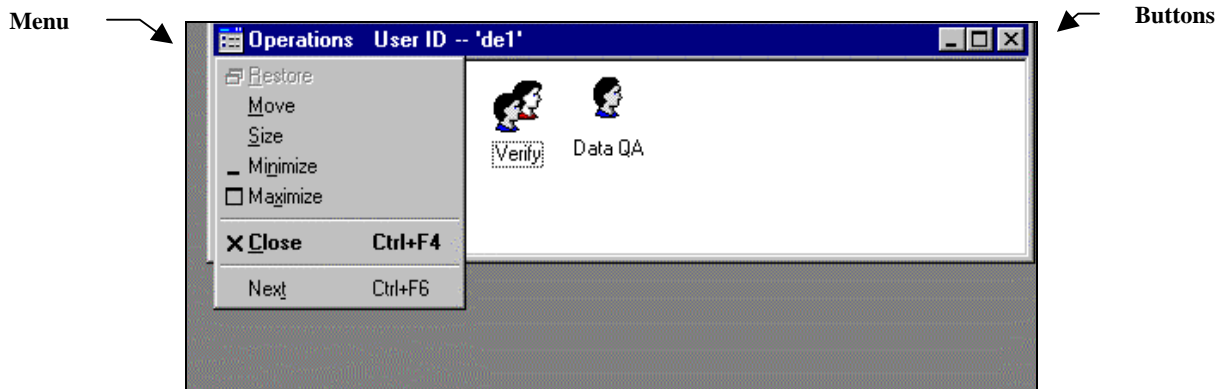
Title Bar. The window’s Title bar identifies the window, and displays the User ID of the individual who has signed on. The User ID is a required Security code assigned to the user by the application’s Administrator (Chapter 6).

Shortcut Icons. A shortcut icon in the *Operations* window’s Data Area either initiates a task that’s been assigned to a specific job—a **Job/Task Combination** (Page **Error! Bookmark not defined.**)—or presents the operator with a list of alternative Job/Task Combinations. For more about shortcut icons, see Page 16.

Menus. When the *Operations* window is active, the menus of the *Taskmaster Window* serve the *Operations* window exclusively. For a full explanation of these menus, see Page 8.

Toolbar icons. In exactly the same way, the icons appearing in the *Taskmaster Window*’s toolbar are there to meet the needs of the *Operations* window. For explanations of each icon, see Page 14.

Window aids. Clicking once on the icon at the left end of the Title bar reveals a mini-menu with aids to help you with the window itself. Buttons at the right end of the Title bar duplicate the actions of four menu items: **Minimize**, **Maximize**, **Restore** and **Close** (the Restore button appears only if you minimize the *Operations* window.) Selecting **Move** lets you move the window around the Data Area of the *Taskmaster Window* but using your cursor to drag it is easier and just as effective. The **Next** item is *not* active.



Operations Window–Aids

- Alert!** Pay close attention to the content of the *Operations* window in the illustration above. In contrast to the example on the previous page, the Title bar’s User ID is now “de1” rather than “admin” and the Data Area contains two rather than eight icons.

These important differences are the result of the application’s Security Program (Chapter 6).

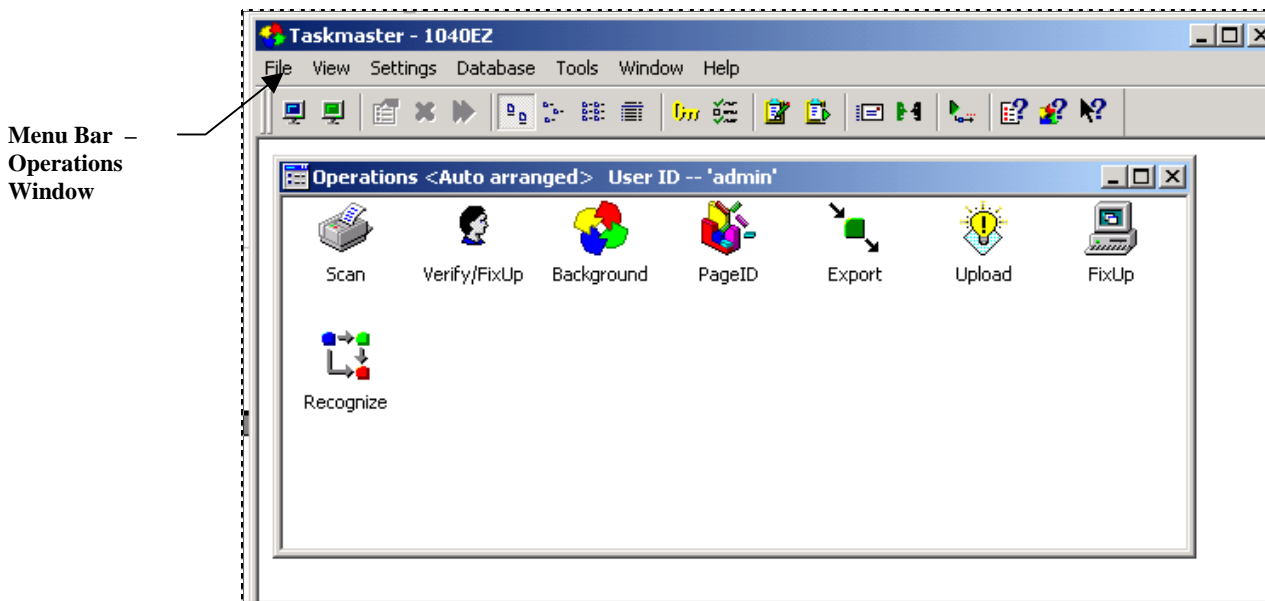
Menus of the Operations Window

- An Administrator who signs on to *Taskmaster* usually has full access to *all* windows, menus, toolbars and operations.
- An operator, on the other hand, is usually limited to a specific set of tasks, and to a far shorter list of menu items and toolbar icons.

Menus of the Operations Window

Other than the mini-menu of basic Windows functions (see the previous page), the *Operations* window has no menus of its own. Instead, it relies on the *Taskmaster Window* for a special set of menu items available only when the *Operations* window is active. (For a complete look at the menus of the *Taskmaster Window*, see Chapter 3.)

If you click on the *Operations* window's Title bar, the Menu bar of the *Taskmaster Window* will adjust accordingly. Selecting a shortcut activates all menu items.



Taskmaster Window - with Operations Window

The table on the next few pages identifies and describes these menus.

- ✓ **Alert!** “Yes” in the **Adm?** column below indicates that a menu item is available *only* to Administrators. Note, too, that the menu options identify their corresponding toolbar icons, if an icon is available.

File Menu

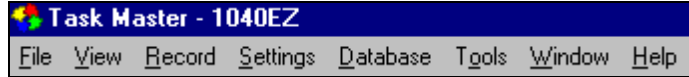
Item	Adm?	Keyboard	Description
Message Font		<i>n/a</i>	Accesses the Windows <i>Font Selection</i> dialog. You can use this dialog to modify the <i>Message Pad's</i> font, type size and format.
Run Tasks		Enter	Initiates a task, or tasks, represented by a shortcut icon you've highlighted in the <i>Operations</i> window (Page 17).
Remove Tasks		Del	Removes the highlighted shortcut icon from the <i>Operations</i> window's Data Area (Page 17). <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 pairs from the workflow.
Properties		Alt + Enter	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 icon, and specifies a Batch Selection Mode . The mode determines how <i>Taskmaster</i> will select batches for processing when you double-click on the highlighted icon. For details, see Page 4.
Unload Tasks		Ctrl + U	Closes the <i>Paper Keyboard</i> and <i>Taskmaster</i> operations directly associated with any tasks that have stopped processing.
Exit		<i>n/a</i>	Closes <i>Taskmaster</i> after confirming your intention to exit.

View Menu

Item	Adm?	Keyboard	Description
Customize		<i>n/a</i>	Accesses the <i>Customize toolbar</i> dialog. Settings in this dialog determine the makeup of the <i>Taskmaster Window</i> toolbar currently in use, and of any secondary toolbars (Chapter 3).
Status Bar		<i>n/a</i>	Toggles the <i>Taskmaster Window's</i> Status bar on and off.

Operations Window: View Menu (continued)

Item	Adm?	Keyboard	Description
Operations		<i>n/a</i>	Opens the <i>Operations</i> window. This selection is unavailable when the <i>Operations</i> window is active.
Job Monitor	<i>Yes</i>	Ctrl + J	Opens the <i>Job Monitor</i> (Chapter 5). <i>Taskmaster</i> Security defines and limits an individual's access to administrative windows and dialogs such as the <i>Job Monitor</i> and <i>Station Monitor</i> (below). For details, see Chapter 6.
Station Monitor	<i>Yes</i>	Ctrl + S	Opens the <i>Station Monitor</i> (Chapter 5).
Large Icons		<i>n/a</i>	Displays "large" shortcut icons in the Data Area of the <i>Operations</i> window (Page 16). Note: These formatting options are also available if you right-click on any shortcut icon.
Small Icons		<i>n/a</i>	Displays significantly smaller icons in the Data Area of the <i>Operations</i> window.
List		<i>n/a</i>	Lists small icons and their titles along the left side of the <i>Operations</i> window.
Details		<i>n/a</i>	Lists small icons, with titles and descriptions, along the left side of the <i>Operations</i> window.
Arrange Icons		<i>n/a</i>	Three settings that position a set of Large Icons or Small Icons within 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>n/a</i>	Places the icons in one or more rows.
Align to Top		<i>n/a</i>	Places all icons in a row at the top of the window.
Auto-Arrange		<i>n/a</i>	A toggle-switch that places all icons in a row at the top of the window and locks them in place.



Menus of the Operations Window

Settings Menu

The items in this menu are *all* administrative: most lead to tabs of the *Taskmaster Administrator* and are available only to authorized users. For a complete description of each menu item, see Chapter 3. For a thorough examination of the *Taskmaster Administrator*, see Chapter 6.

Item	Adm?	Keyboard	Description
Workflow	Yes	n/a	Retrieves the <i>Workflow</i> tab of the <i>Taskmaster Administrator</i> .
Modules	Yes	n/a	Retrieves the <i>Modules</i> tab of the <i>Taskmaster Administrator</i> .
Groups	Yes	n/a	Retrieves the <i>Groups</i> tab of the <i>Taskmaster Administrator</i> .
Users	Yes	n/a	Retrieves the <i>Users</i> tab of the <i>Taskmaster Administrator</i> .
Stations	Yes	n/a	Retrieves the <i>Stations</i> tab of the <i>Taskmaster Administrator</i> .
Shortcuts	Yes	n/a	Retrieves the <i>Shortcuts</i> tab of the <i>Taskmaster Administrator</i> .
QA	Yes	n/a	Retrieves the <i>QA</i> tab of the <i>Taskmaster Administrator</i> .
General	Yes	n/a	The General item is a sub-menu with four sub-items, each leading to a tab of the <i>Taskmaster Settings</i> dialog (Chapter 3).
Databases	Yes	n/a	Retrieves the <i>Databases</i> tab of the <i>Taskmaster Settings</i> dialog.
Advanced	Yes	n/a	Accesses the <i>Advanced</i> tab of the <i>Taskmaster Settings</i> dialog.
Background	Yes	n/a	Accesses the <i>Background</i> tab of the <i>Taskmaster Settings</i> dialog.
Log	Yes	n/a	Accesses the <i>Log</i> tab of the <i>Taskmaster Settings</i> dialog.

Database Menu

Remember: A *Yes* in the **Adm?** column means that only Administrators can use the menu item.

Item	Adm?	Keyboard	Description
Login		<i>n/a</i>	Accesses the <i>User ID & Password</i> dialog. You can use this dialog to re-sign on using a different, authorized User ID and Password.
Logoff		<i>n/a</i>	Closes <i>Taskmaster</i> .
Change Password	<i>Yes</i>	<i>n/a</i>	Retrieves the <i>Change Password</i> dialog. Administrators can use this dialog to change or update User IDs and Passwords (Chapter 6).
Admin Roam	<i>Yes</i>	<i>n/a</i>	Connects <i>Taskmaster</i> to an alternative Admin database. For details, see Chapter 3.
Engine Roam	<i>Yes</i>	<i>n/a</i>	Connects <i>Taskmaster</i> to another Engine database (Chapter 3).
Run Task	<i>Yes</i>	<i>n/a</i>	Accesses the <i>Run Task</i> dialog. An Administrator can use this dialog to select and test one or more tasks. For details, see Chapter 3.

Tools Menu

Remember: A *Yes* in the **Adm?** column means that only Administrators have access to the menu item. Remember, too, that this menu identifies any corresponding toolbar icons.

Item	Adm?	Keyboard	Description
Log Viewer		<i>n/a</i>	Activates the <i>Datacap Log Viewer</i> . This <i>Log Viewer</i> displays information about your computer's <i>Taskmaster</i> performance. For details, see Chapter 3.
Log to File		<i>n/a</i>	A toggle switch directing <i>Taskmaster</i> to add log data to a file (Chapter 3).
Open Chat Window	<i>Yes</i>	<i>n/a</i>	Retrieves the <i>Chat</i> dialog (Chapter 3).
Send Message	<i>Yes</i>	<i>n/a</i>	Accesses the <i>Send Message</i> dialog (Chapter 3).
Start Task on Remote Station	<i>Yes</i>	<i>n/a</i>	Allows an Administrator to initiate a task on a <i>Taskmaster Client</i> <i>other than</i> this client.
Stop Processing on Remote Station	<i>Yes</i>	<i>n/a</i>	Terminates a Job/Task Combination running on a remote workstation.
Shut down Remote Station	<i>Yes</i>	<i>n/a</i>	Closes <i>Taskmaster</i> running on a remote workstation.
Components Information		<i>n/a</i>	Retrieves the <i>Components Information</i> dialog. (Chapter 3).

Window Menu

These standard Windows items arrange multiple windows within the *Taskmaster Window*'s Data Area.

Help Menu

Item	Adm?	Keyboard	Description
Help Topics		<i>n/a</i>	Connects you to the <i>Taskmaster Help</i> 's Index and Browser.
Session Information		<i>n/a</i>	Retrieves the <i>Session Information</i> dialog (Chapter 3).
About TM Client		<i>n/a</i>	Displays additional facts about <i>Taskmaster Client</i> , and about Datacap .

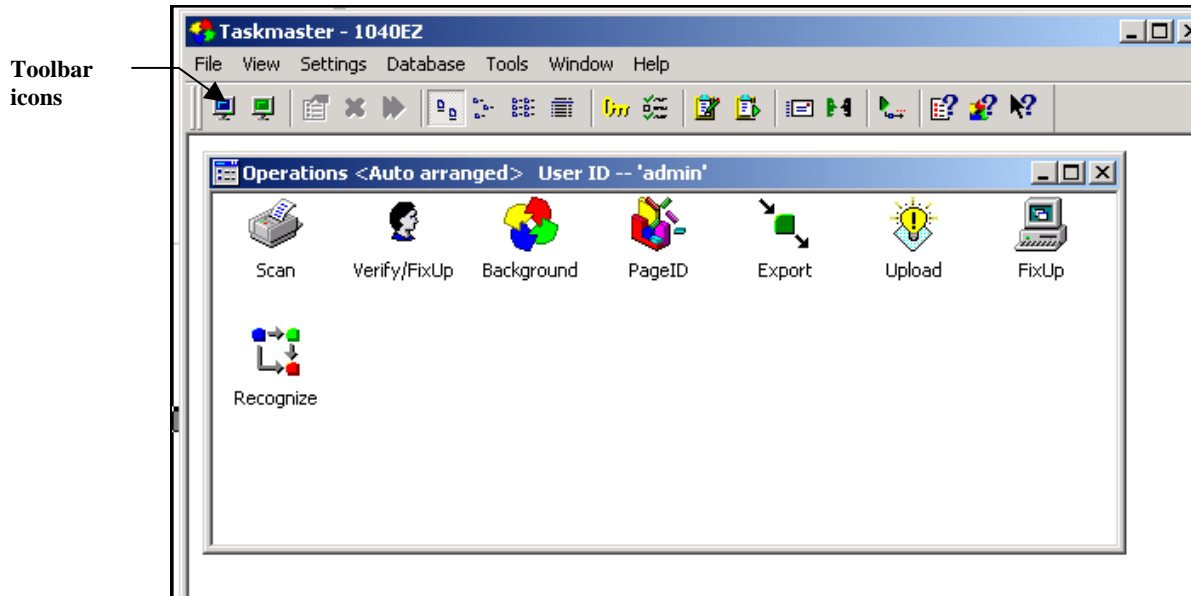
Toolbar Icons of the Operations Window

The *Taskmaster Window* maintains a large inventory of *toolbar* icons (Chapter 3). Eight have been set aside exclusively for the secondary *Operations* window. As the descriptions on the next page explain, four determine how **Job-Task shortcut icons** appear in this window; the others initiate task activity.



Core toolbar Icons—Operations Window

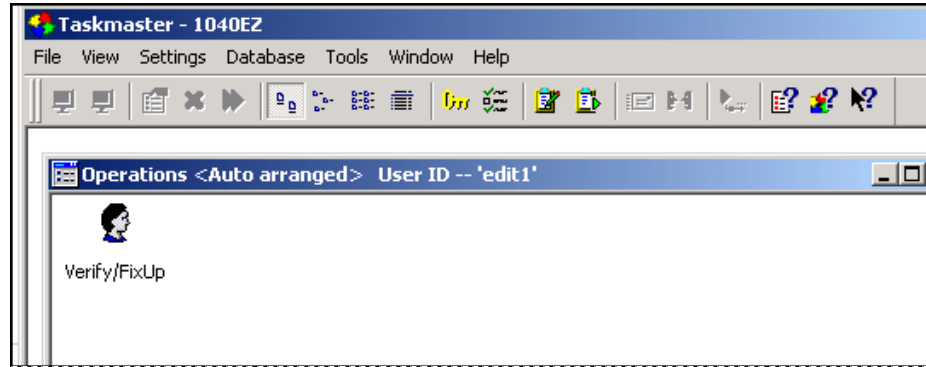
When the *Operations* window is active, only one of the **Operations** icons actually appears in the *Taskmaster Window* toolbar; the other icons accompany their corresponding menu selections. Still, this toolbar configuration does have *sixteen* icons.



**Taskmaster Window—with Operations Window
Administrator Sign-On**

The remaining toolbar icons come from *Taskmaster's* **File** set of fourteen icons (Chapter 3); these icons can appear in *any* toolbar configuration.

Other aspects of this toolbar deserve your attention. Consider what happens when a user with limited responsibilities signs on—the “de1” Verification operator below, for example. The same twelve icons appear but many are not available. Instead, they are grayed out.








***Taskmaster Window—with Operations Window
Verification Operator Sign-On***

Early decisions the Administrator makes when configuring the application determine the makeup of the toolbar. For more about this process, see Chapter 3.




Later on, the Administrator’s specifications for the application’s Security Program set limits on each user’s access to the toolbar and its icons. For details of this process, see the *Administrator’s Guide*.

The table below describes the core **Operations** icons: explanations of all *Taskmaster* toolbar icons are in Chapter 3.

Title	Icon	Menu Item?	Description
Shortcut Properties		File/Properties	Opens the <i>Shortcut Properties</i> dialog of a highlighted Job-Task shortcut icon (Chapter 3).
Remove Shortcut Components		File/Remove	Removes a highlighted shortcut icon from the <i>Operations</i> window’s Data Area.
Run Tasks		File/Run Tasks	Activates the <i>Run Tasks</i> dialog for a shortcut icon you’ve highlighted.
Unload All Tasks		File/Unload Tasks	Closes procedures and windows associated with the most recent task activity.
Large Icons		View/Large Icons	Displays larger versions of an application’s shortcut icons in the <i>Operations</i> window’s Data Area.

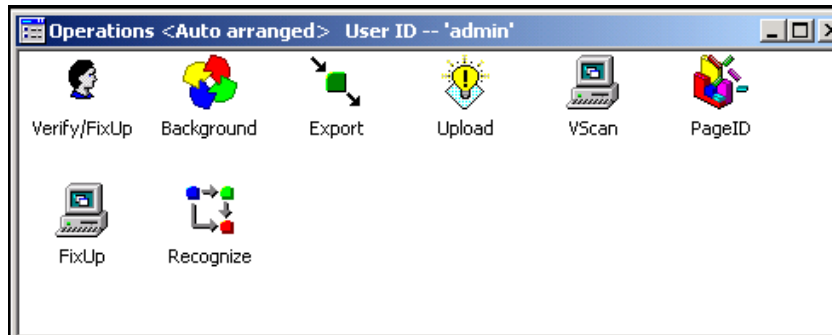
Shortcut Icons of the Operations Window

Operations Icons

Title	Icon	Menu Item?	Description
Small Icons		View/Small Icons	Displays smaller versions of an application's shortcut icons in the <i>Operations</i> window's Data Area.
List: Icons		View/List	Displays small shortcut icons as a list along the left side of the <i>Operations</i> window's Data Area.
Details: Icons		View/Details	Lists small shortcut icons and their descriptions along the left side of the <i>Operations</i> window's Data Area.

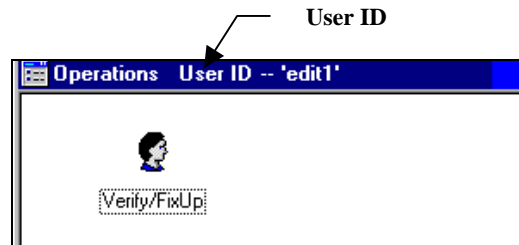
Shortcut Icons of the Operations Window

When the *Administrator* of an application signs on to *Taskmaster*, the *Operations* window usually contains shortcut icons leading to every possible Job/Task Combination. The *1040EZ* application, for example, might use these shortcuts:



Operations Window—Full Workflow

However, when a Data Entry *operator* signs on, the window looks like this:



Operations Window—Verification

In this example, *1040EZ Security* has severely limited the scope of the operator's activities; "edit1" has permission to carry out the Verification tasks assigned to the workflow's Main jobs (Verify), and the FixUp task of the application's FixUp child job.

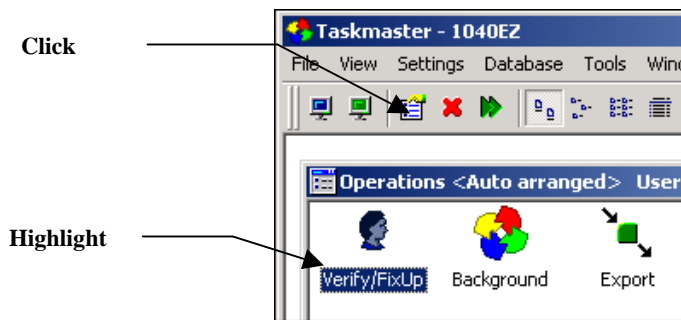
Still, although the two windows differ dramatically in content and appearance, their features are almost identical. Because the Verification example is simpler, let's begin with its shortcuts.

Shortcut Properties

Shortcuts make things happen.

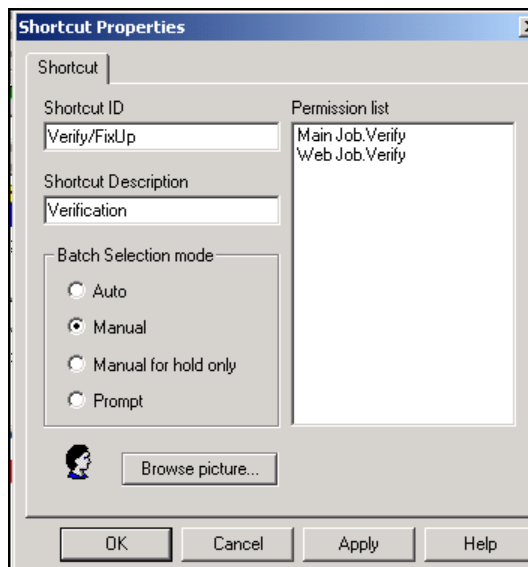
For example, clicking on the Verify shortcut is the first step in a process that starts a task that's part of a job. But which task? Which job?

To find out, highlight the **Verify** shortcut icon, and click on the **Properties** toolbar to access the **Shortcut Properties** dialog will appear (see the next page). This dialog determines which Job/Task Combinations you can initiate using this shortcut **and** how you'll select the batches you're going to process.



Taskmaster Window – with Operations Window

- ✓ The Administrator uses the *Shortcuts* tab of the *Taskmaster Administrator* to define a shortcut icon and provide it with properties. For more information, see Chapter 6.



Shortcut Properties Dialog – Verify/FixUp

Shortcut Icons of the Operations Window

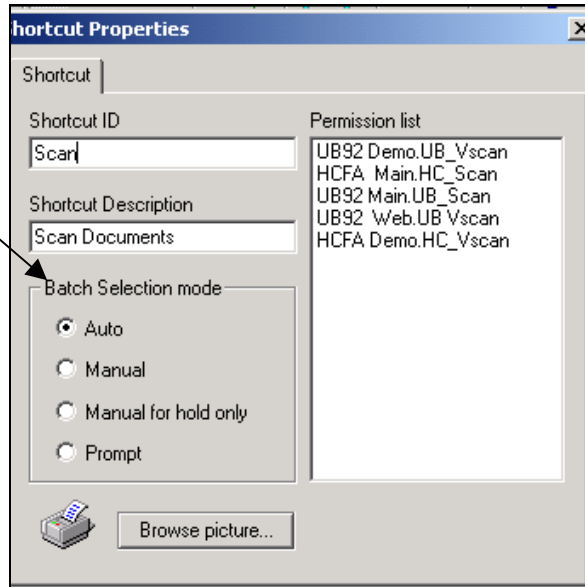
The table below describes the fields and functions of the *Shortcut Properties* dialog.

Field/Function	Description
Shortcut ID	<p>A unique code identifying this shortcut icon.</p> <p>The Administrator assigns this code and all other shortcut properties when he or she first defines the shortcut icon (Chapter 6).</p>
Shortcut Description	A brief description of the icon.
Permission List	<p>A list of the shortcut's Job/Task Combinations.</p> <p>Important! In the illustration, the shortcut qualified for <i>Main Job.Verify</i> and <i>Web Job.Verify</i>. Note that it does not yet assign permissions for any FixUp jobs and their tasks.</p>
Batch Selection Mode Area	<p>The options in this area determine how <i>Taskmaster</i> will select batches for processing by these Job/Task Combinations. These are radio buttons: the shortcut 's properties must include a Batch Selection Mode.</p> <p>Remember: This Batch Selection Mode applies to all Job/Task Combinations in the list.</p>
Auto	<p>Automatically selects and begins to process the next batch in line for any of the shortcut's Job/Task Combinations.</p> <p>This "line" of waiting batches is known as the icon's Job/Task queue.</p> <p>Because this mode initiates behind-the scenes activity, it is usually a property of a shortcut representing a start-up Scan task, or <i>unattended</i> tasks...tasks that require little if any operator intervention.</p> <p>In the illustration of a <i>Medical Claims</i> shortcut on the next page, the <i>Scan</i> shortcut covers two Scan tasks assigned to five jobs.</p>

Shortcut Properties Dialog (continued)

Field/Function	Description
Manual	<p>Retrieves the <i>Batch Selection</i> dialog (Page 25).</p> <p>The <i>Batch Selection</i> dialog lists every batch in the icon's queue. Before processing can begin, the operator <i>must</i> first select a batch from the list.</p> <p>In the example on Page 17, <i>Manual</i> is the Batch Selection Mode of the Verify/FixUp shortcut.</p> <p>As a result, when the Data Entry operator double-clicks on the icon, the <i>Batch Selection</i> dialog lists all batches in the queues of the Verification tasks and the jobs to which they belong—all batches waiting to be processed by the two Job/Task Combinations.</p>

Batch Selection Mode = Auto



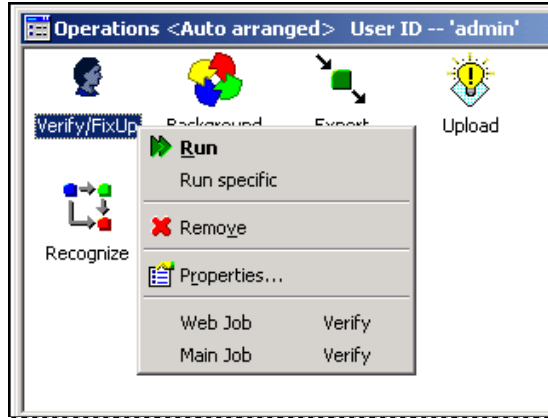
Shortcut Properties Dialog—Scan Tasks

Shortcut Properties Dialog (continued)

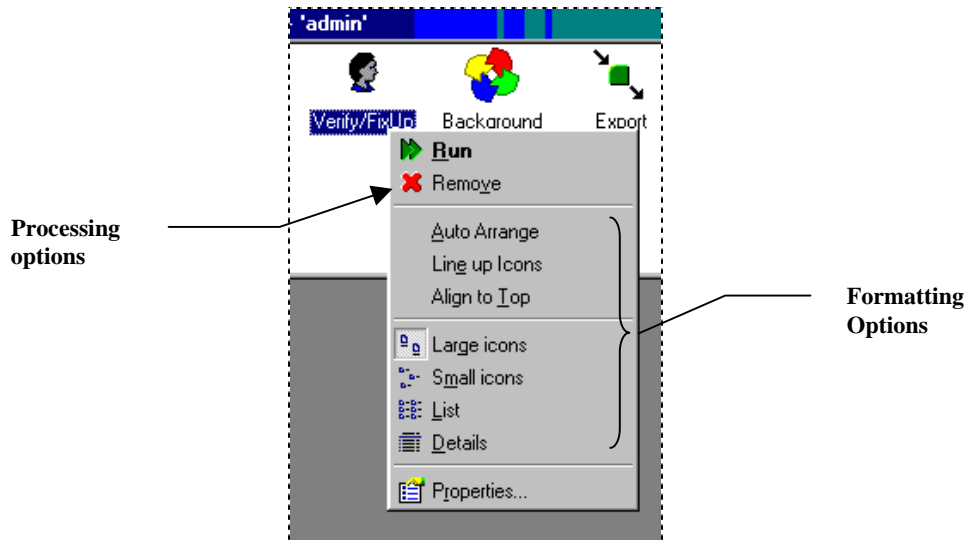
Field/Function	Description
<i>Batch Selection Mode (continued)</i>	
Manual for Hold Only	<p>Automatically processes all batches in the icon's queue <i>except</i> those with a <i>Hold</i> status.</p> <p>A shortcut with this Batch Selection Mode operates in a two-step sequence. The first step retrieves the Batch Selection dialog, which lists batches in the queue with a <i>Hold</i> status. <i>Taskmaster cannot</i> automatically handle the remaining batches until you have successfully dealt with these problem batches.</p> <p>Shortcuts initiating "remedial" tasks often employ this mode. In the <i>1040EZ</i> world, for example, a FixUp task is part of a <i>child</i> job set up to take care of problems. Most batches assigned to these child jobs arrive with a <i>Hold</i> status.</p>
Prompt	<p>Displays the Shortcut Properties dialog each time the task selects a batch <i>automatically</i>.</p> <p>This allows an Administrator to change the Batch Selection Mode setting before the task processes the next batch, and can be a helpful testing device.</p>
Permission List	The Job/Task Combinations covered by the shortcut icon
Icon Picture	The icon's current cartoon.
Browse Picture button	<p>Accesses the Select Icon dialog (Chapter 6).</p> <p>The Administrator uses this dialog to assign a cartoon to the shortcut.</p>

Shortcut Icons: Processing Options

When you right-click on a shortcut icon, the two items at the top of the list are processing options (**Run Specific** is for *future use*.)



- **Run** initiates all Job/Task Combinations associated with the icon, and duplicates the act of double-clicking on the icon. The icon next to the option's title is a core icon of the *Operations* window (Page 14).
- **Remove** deletes a shortcut from the Data Area of the *Operations* window, after asking if you're sure you want to take such a step. This option is available *only* to Administrators: in the example below, a Data Entry operator's selection of the **Remove** options will have no impact. Again, the icon next to the option's title is a core icon of the *Operations* window.



Shortcut Icons–Options List

Shortcut Icons of the Operations Window

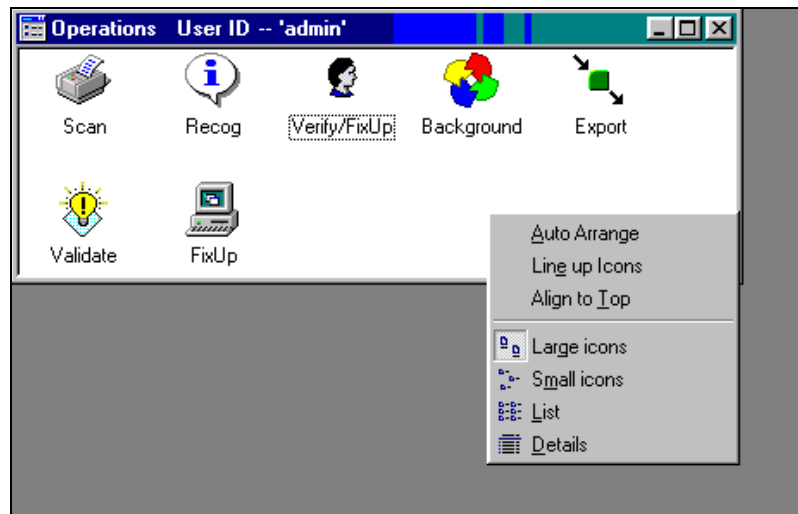
Shortcut Icons–Formatting Options

Most items in the options list above have nothing to do with a particular shortcut. Instead, they duplicate the formatting selections of the **View** menu (Page 9). These items format the **Operations** window's Data Area.

In fact, if you place your cursor anywhere in the Data Area and right-click, the formatting options appear as a set (see the next page).

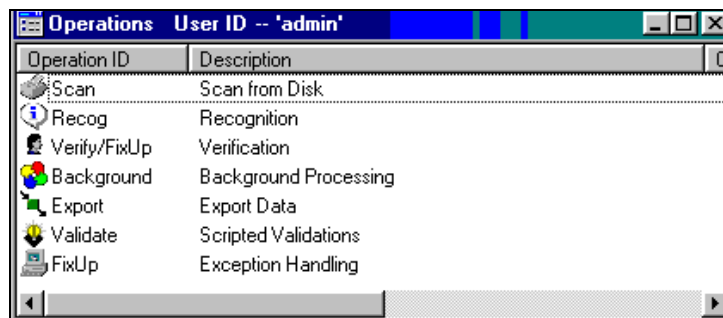
Look first at **Large Icons** and **Small Icons**. Selecting one or the other determines the size of the icon pictures in the Data Area, the type size of the accompanying titles, and the amount of space between icons.

- ✓ **Tip:** Unless your **Operations** window has numerous shortcuts, use the **Large Icons** option (illustrated on the next page).



Operations Window–Formatting Options

List and **Details** both arrange the icons as a list down the left side of the **Operations** window but **Details** adds descriptions (below). However, both options use small icons and less space, and are more difficult to read.



Shortcut Icons–Details Format

AutoArrange, **Line Up Icons** and **Align to Top** apply only if you've selected **Large Icons** or **Small Icons** as the display alternative.

After you moved the icons around the Data Area and you're satisfied with their placement, **Line Up Icons** straightens the rows they're in, and evenly spaces the icons in each row. **Align to Top** arranges the icons in a row at the top of the Data Area, and in additional rows if more room is needed. **AutoArrange** also creates a row along the top but then "freezes" the row: unless you un-select this option, you can not move or remove icons.

- ✓ For most configurations, the combination of **Large Icons** and **Line Up Icons** produces the most satisfactory arrangement of shortcuts within the *Operations* window.

Processing Dialogs: Job/Task Operations

When you double-click on a shortcut icon in the *Operations* window, *Taskmaster* responds.

The precise nature of a response varies according to the nature of the Job/Task Combinations the shortcut represents, and its Batch Selection Mode (Page 4). Starting up a Scan task linked to a physical scanner almost always requires essential operator entries in a *StartBatch* panel. And the *Batch Selection* dialog usually appears when a Verification task begins.

Other processing dialogs, however, are elements of the workflow itself. Most are involved in the task's administration. They announce the end of the task, and ask how you'd like to proceed. Occasionally, they alert you to a problem the task is having, and may even suggest an interim solution (the use of a FixUp task, for example). If a workflow includes Data Validation procedures, these dialogs identify fields with unacceptable values.

This section examines the standard dialogs of *Taskmaster* operations, including:

Task Monitor: Page 24

StartBatch Panel: Page 29

Select Job to Start: Page 34

Batch Selection: Page 25

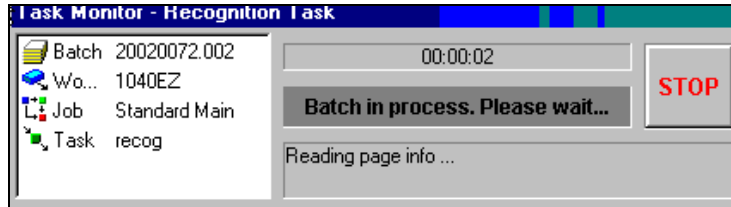
Batch End: Page 30

Message Pad: Page 31.

This section does *not*, however, cover the *Data Entry* panels which take over when you Verification task. These are described in the task's documentation.

Task Monitor

The *Task Monitor* tracks and reports on the progress of a task as it processes a batch. It appears on your screen as soon as the task starts and closes automatically when the task is complete. You *cannot* close the *Task Monitor* manually.



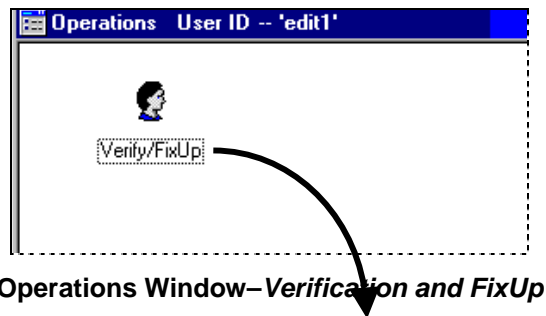
Task Monitor

The fields of the *Task Monitor* include:

Item	Description
Title Bar	Identifies the applicable Task Category (Scan, Recognition, etc).
Batch ID	The unique identifying code of the batch the task is processing. A typical Batch ID combines a date (Year, Month and Day) with a sequential “counter.”
Workflow	The ID of the Workflow Hierarchy containing the task. (Page Error! Bookmark not defined.)
Job	The name of the <i>Taskmaster</i> job to which the task belongs. In the example, the recog task is part of the Standard Main job.
Task	The identity of the task. In the example, the recog task is processing the batch.
Time	The elapsed time of the task’s involvement with the batch, in hours, minutes and seconds.
Batch Processing	A message indicating the nature of the task’s current work with the batch.
Task Activity	The task’s current procedure.
Stop Button	Interrupts processing after an automatic task such as Scan or Recognition finishes with the current page.

Batch Selection Dialog

If a shortcut's **Batch Selection Mode** is *Manual* (Page 4), the **Batch Selection** dialog appears as soon as you double-click on the icon. If the **Batch Selection Mode** is *Manual for Hold Only*, the **Batch Selection** dialog will appear if any of the batches in the shortcut's queue has a *Hold* status.



	Q ID	Batch ID	Job.Task	Status	Job Sta
1	20	20040292.002	Main Job.Verify	pending	10/18/2004
2	21	20040292.003	Main Job.Verify	pending	10/18/2004
3	22	20040292.004	Main Job.Verify	pending	10/18/2004
4	49	20040293.023	Main Job.Verify	pending	10/19/2004
5	50	20040293.024	Main Job.Verify	pending	10/19/2004
6	51	20040293.025	Main Job.Verify	pending	10/19/2004
7	52	20040293.026	Main Job.Verify	pending	10/19/2004

Batch Selection Dialog

Most of this dialog is a **Batch Information Table** with a row for every batch in this icon's processing queue. In the illustration above, the Batch Selection Table lists *only* batches awaiting processing by Verification tasks assigned to the *1040EZ* workflow's Main Job and Web Job (Page **Error! Bookmark not defined.**).

☛ **Very important!** In *Taskmaster*, the structure of the **Batch Selection** dialog's Batch Information Table duplicates the structure of the **Job Monitor**'s Batch Information Table. In fact, a change to the format of one automatically results in the same change to the other. Furthermore:

- The batch management techniques and privileges associated with the **Job Monitor** belong to the **Batch Selection** dialog as well.
- The numerous items that appear in the **Taskmaster Window's Record** menu when the **Job Monitor** is active are also available to the **Batch Selection** dialog. (Page 28 describes three additional items which are part of the **Record** menu only when the **Batch Selection** dialog is active.)

Processing Dialogs: Job/Task Operations

- If you add a “custom” column to the Batch Information Table of the *Job Monitor* (Chapter 5), it instantly becomes part of the *Batch Selection* dialog’s Batch Information Table.

Chapter 5 deals extensively with the *Job Monitor* and, therefore, with most aspects of the *Batch Selection* dialog. The table below reviews the default columns in the dialog’s Batch Information Table.

Column	Description
Row ID	A sequential number identifying a particular row within the table. This number is an especially helpful reference when you scroll to the right end of the table.
Q ID	A number identifying the position of the batch in the shortcut’s queue; a higher number indicates a later addition to the queue. Navigational options in the <i>Taskmaster Window’s Record</i> menu use Queue IDs as reference points.
Batch ID	The Batch Number for the batch. A typical Batch ID combines a date with a sequential number.
Job-Task	The Job/Task Combination which is: - Next in line to process the batch; or - Awaiting the return of the batch from a child job; or - Responsible for ending the batch’s involvement with the job.
Status	The current processing status of the batch. This status often determines whether or not a particular task (technically, a Job/Task Combination!) can process the batch. While most tasks can process a batch with a <i>Pending</i> status, most cannot take on a batch with an <i>Aborted</i> status.
Job Start	The date and time when the <i>job</i> component of the Job-Task combination first became involved with the batch. Unless the listing deals with a batch in line for the first task of a child job – a FixUp job, for example – this field probably has a value.
J Sec	The time the job (and tasks up to this point) have spent actively processing the batch, so far. This figure does <i>not</i> include time spent waiting for a computer, an operator or a place in the next task’s queue.

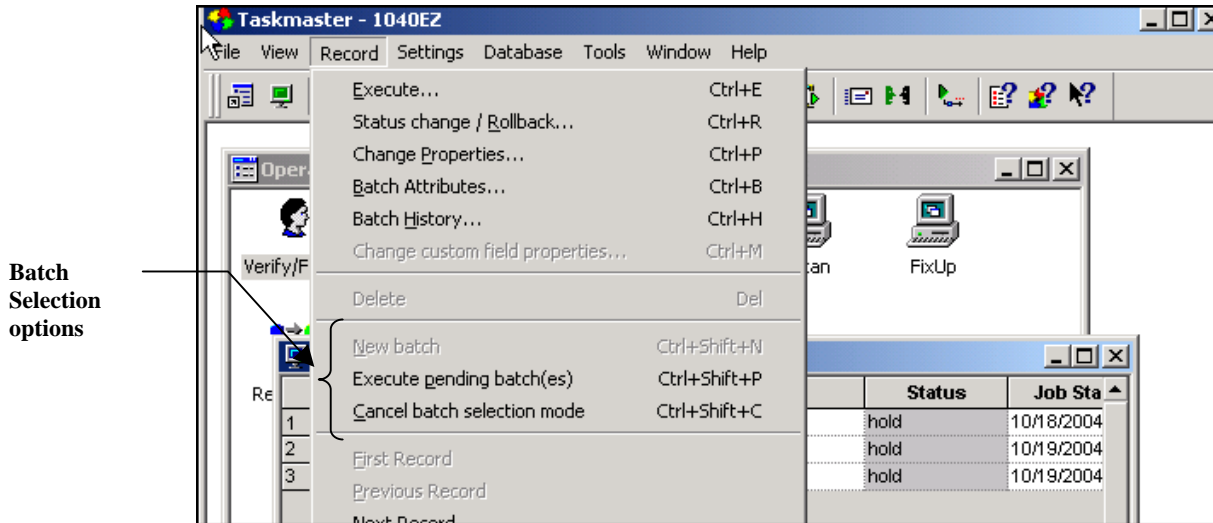
Batch Selection Dialog – *Batch Information Table (continued)*

Column	Description
Task Start	The date and time when the <i>task</i> component of the Job-Task combination first became involved with the batch. If the batch has a <i>Pending</i> status and is waiting for the task, this field is probably empty.
T Sec	The time the task has spent processing the batch, so far.
Op	The User ID of the operator who initiated this Job/Task Combination's processing of the batch. Because a typical batch has yet to be processed by a listing's Job/Task Combination, this field is usually empty. However, if the progress of a batch is halted temporarily, or if a job finishes its work with the batch, <i>Taskmaster</i> places an Operator ID in this field.
Station	The Station ID of the workstation from which the efforts of the Job/Task Combination with this batch were launched. Again, this field is empty unless processing stops mid-stream and the batch goes to a child job for repair – or the Main job's final task completes its work and assigns a <i>Finished</i> status to the batch.
Priority	The priority assigned to the batch <i>by the Scan task</i> when the batch is originally assembled.
Docs	The number of documents in the batch. This figure appears only after the Recognition has organized the batch into a series of documents and their pages.
Images	The number of Image files in the batch.

☛ To process a batch, just double-click on its listing in the Batch Selection Table!

Batch Selection Dialog – Record Menu Items

When the *Batch Selection* dialog is open, the **Record** menu of the *Taskmaster Window* can activate up to three additional options:



**Taskmaster Window – Record Menu
Active Batch Selection Dialog**

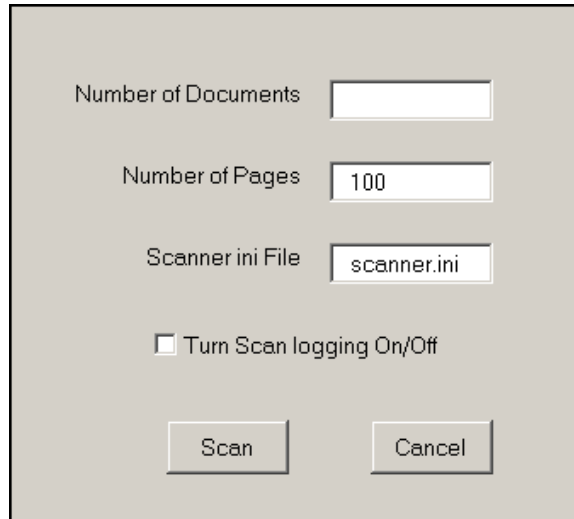
New batch. Creates a new batch, places the batch in the processing queue of the job's Scan task, and assigns a *Pending* status to the batch. This option is available only for tasks built upon a *Batch Creation* Task Module. See the *Workflow Development and Operations Manual* for details.

Execute pending batches. Gives an operator the chance to intervene manually by directing *Taskmaster* to process certain batches with a *Pending* status. This option is available only if the Batch Selection dialog lists batches with a *Hold* status.

Cancel batch selection mode. Closes the *Batch Selection* dialog without taking any other action, and returns you to the Job-Task shortcuts in the secondary *Operations* window.

StartBatch Panel

A typical workflow begins with a Scan task...and most Scan tasks begins with a *StartBatch* data panel.



The image shows a dialog box titled "StartBatch Panel" with a light gray background. It contains four input fields and two buttons. The first field is labeled "Number of Documents" and is empty. The second field is labeled "Number of Pages" and contains the number "100". The third field is labeled "Scanner ini File" and contains the text "scanner.ini". Below these fields is a checkbox labeled "Turn Scan logging On/Off" which is currently unchecked. At the bottom of the dialog are two buttons: "Scan" on the left and "Cancel" on the right.

StartBatch Panel

The exact format and content of the *StartBatch* panel you're using will probably differ from the example above...compare this one to the illustration on Page 4. But the basics will be the same.

Number of Documents. This is the Scan task operator's estimate of how many documents the batch will contain *after* a Recognition task organizes the batch into a series of documents and assigns pages to each.

Number of Pages. This is the total number of pages the Scan task is expected to process.

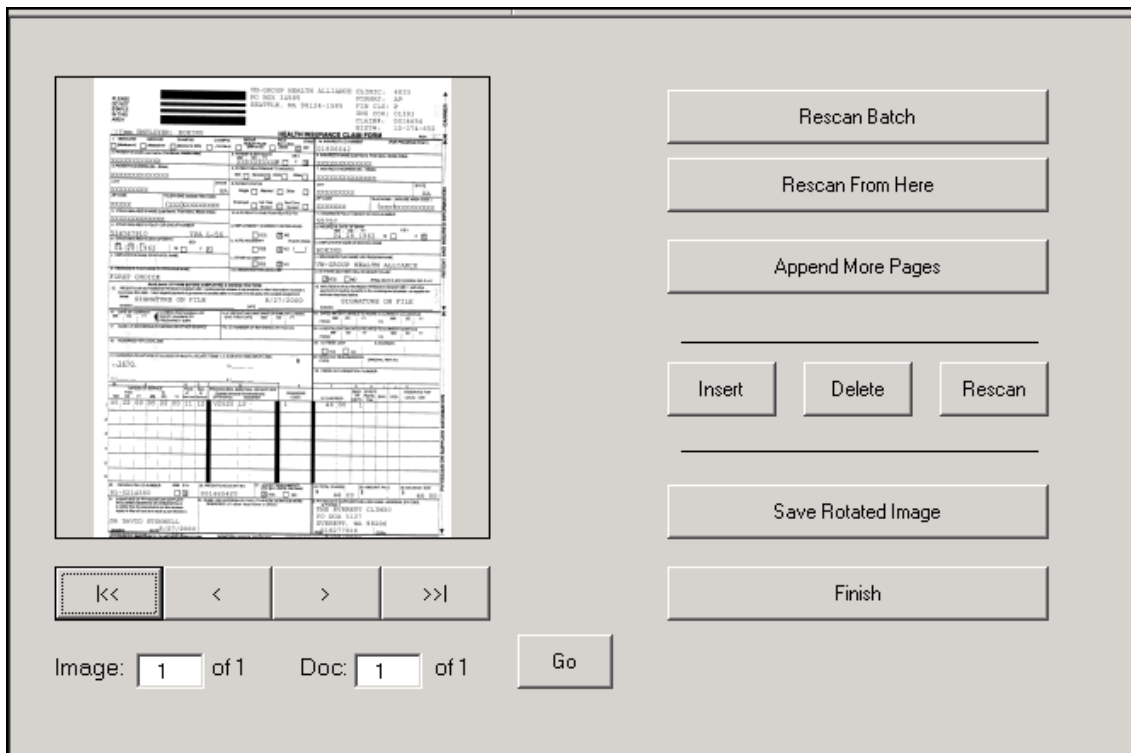
Scan button. Confirms your acceptance of the settings in the *Start Batch* panel and begins the scanning process.

Cancel button. Deletes the entries in the *Start Batch* panel, and closes the dialog.

Batch Review Dialog

After scanning is over and the new batch is complete, a **Batch Review** dialog appears with a set of important processing statistics. It also provides you with an easy-to-use tool to help identify the source of a potentially serious problem if *Taskmaster* expects 50 pages but the Scan task has processed 48.

- ✓ The format and content of a **Batch Review** dialog depends on the kind of Scan task you're running. The example below illustrates the dialog of the iScan task. The documentation for a particular Scan task describes the components and use of its **Batch Review** dialog.

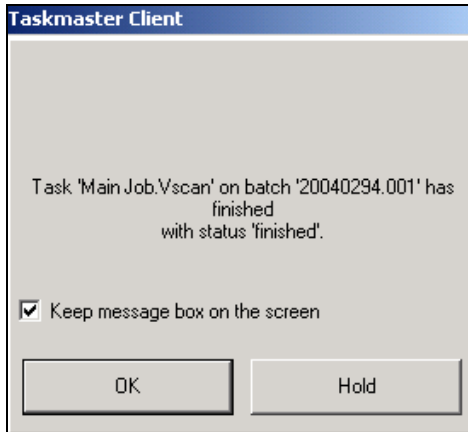


Batch Review Dialog – iScan Task

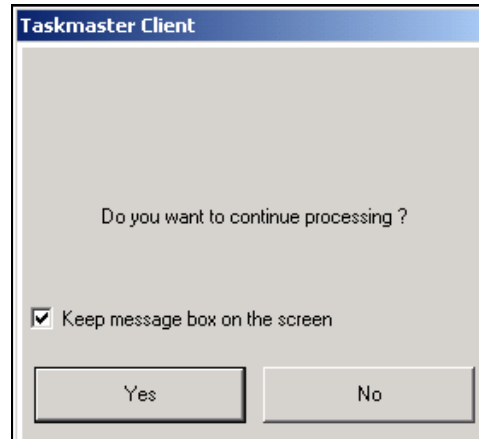
Task Operations Message Pad

The *Task Operations Message Pad* first appears as soon as a task has processed a batch (**Batch Completion**) and, almost immediately afterwards, when it asks if you would like to continue (**Continue Processing?**).

The sequence of these messages, and their content, are important. First, however, read through the descriptions of the *Message Pad's* fields and functions below.



**Task Operations Message Pad–
Batch Completion**



**Task Operations Message Pad–
Continue Processing Option**

Field/Function	Description
Message Area	<p>In the Batch Completion mode, this area:</p> <ul style="list-style-type: none"> Identifies a Job/Task Combination (Mmain Job.Vscan , in the example above). Announces that the Job/Task Combination has completed processing a particular batch (Batch ID = 20040294.001, in the example). Specifies the status that <i>Taskmaster</i> has assigned to the batch (<i>Finished</i>, in the example). <p>For some tasks, the Message Area may include Alerts or Reminders. At the conclusion of a Recognition task, for example, there may be a reminder that the batch requires verification before its data can be exported.</p> <p>When the Message Pad is in its Continue Processing? mode, the Message Area wants to know if you'd like to interrupt the workflow at this stage by pressing the No button, or continue by pressing the Yes button.</p> <p>The impact of a decision to continue processing varies in response to the job's structure and the coverage of a shortcut icon. For details, see the next page.</p>

Task Operations Message Pad (continued)

Field/Function	Description
Keep Message Dialog on the Screen	<p>The <i>Task Operations Message Pad</i> is a timed device: after a few seconds it disappears from your screen <i>unless</i> you select this option by clicking on the check dialog.</p> <p>Warning! The <i>Message Pad</i> will remain on your screen until you click on this check dialog again.</p> <p>For an explanation of the timing mechanism, see the next page.</p>
Action Buttons– Batch Completion	<p>Clicking on the OK button indicates your acceptance of this Job/Task Combination’s processing results, and of <i>Taskmaster’s</i> assignment of a processing status to the batch.</p> <p>Clicking on the Hold button directs <i>Taskmaster</i> to assign a <i>Hold</i> status to the batch. This prevents any further processing until problems with the batch have been examined, solutions developed and the status removed.</p>
Action Buttons– Continue Processing?	<p>Pressing the Yes button directs <i>Taskmaster</i> to continue processing batches, according to the guidelines on the next page.</p> <p>Pressing the No button halts processing until you take steps to resume.</p>

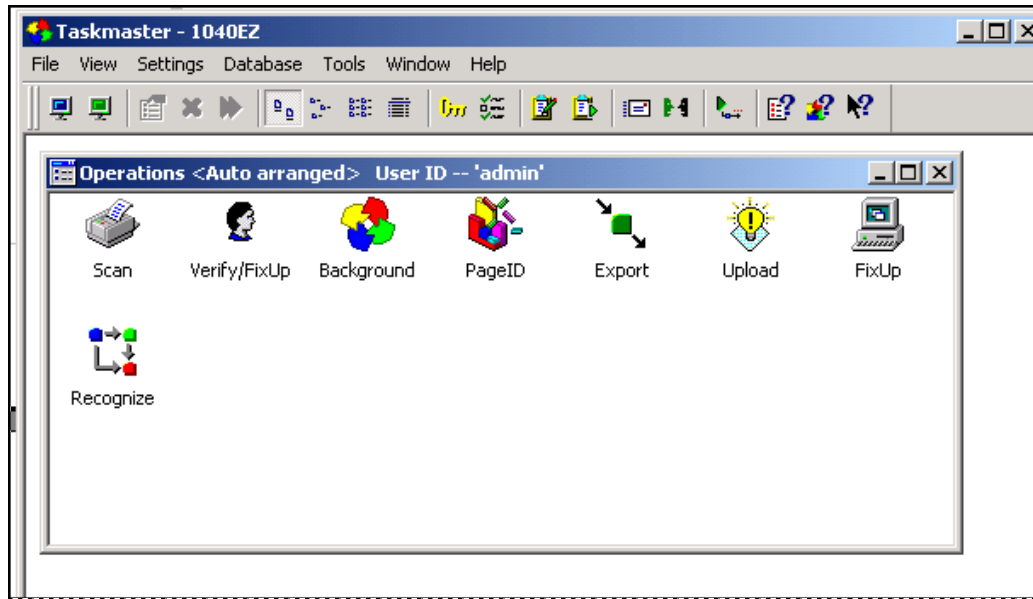
Continue Processing?

When the *Task Operations Message Pad* asks “Do you want to continue processing?” clicking on the Yes button directs *Taskmaster* to process the next batch in the shortcut icon’s queue (Page 16).

After processing is complete, the *Task Operations Message Pad* gives you a chance to confirm the results, then asks if you’d like to continue processing. Press the Yes button retrieves the next batch in the icon’s queue.

Scan tasks, however, do not have queues simply because they create new batches rather process existing batches. If you direct *Taskmaster* to continue processing after a Scan task completes its work, the task begins all over again, ready to process a tray full of forms – or, in the case of a “virtual” Scan task that processes existing images, looks for the next set of files.

If a shortcut represents tasks such as Verification, *Manual* is probably its **Batch Selection Mode** (Page 4). When you decide to *continue processing* after task has processed a batch, the *Batch Selection* dialog will appear with a list of batches in the Verify shortcut’s queue.



Operations Window–1040EZ

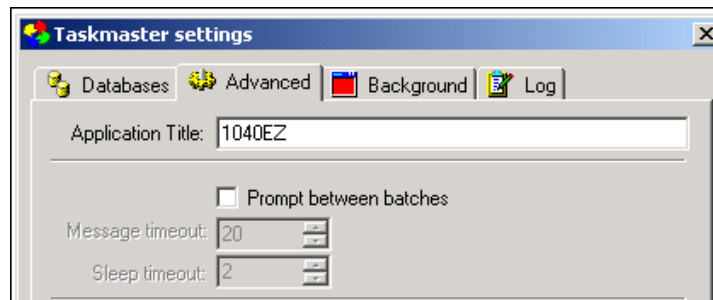
Timing

Administrative specifications in the *Advanced* tab of the *Taskmaster Settings* dialog (below and Chapter 3) determine how long (in seconds) the *Task Operations Message Pad* will remain on your screen *if* you check the **Prompt between Batches** option.

If you do *not* activate this check dialog or press a button, the *Message Pad* will automatically select *OK* in the **Batch Selection** mode and *Yes* in the **Continue Processing** mode.

Removing Batch End Task Messages

The *Batch End* messages require operator participation. You can eliminate these messages from the application’s workflow by removing the default check from the **Prompt between Batches** checkdialog in the *Advanced* tab of the *Taskmaster Settings* dialog.

Taskmaster Settings dialog – *Advanced* tab

As a result, the *Batch End* messages will not appear when a task has finished with a batch. Instead, *Taskmaster* assumes that you “want to keep processing” and takes steps to

Job Selection Dialog

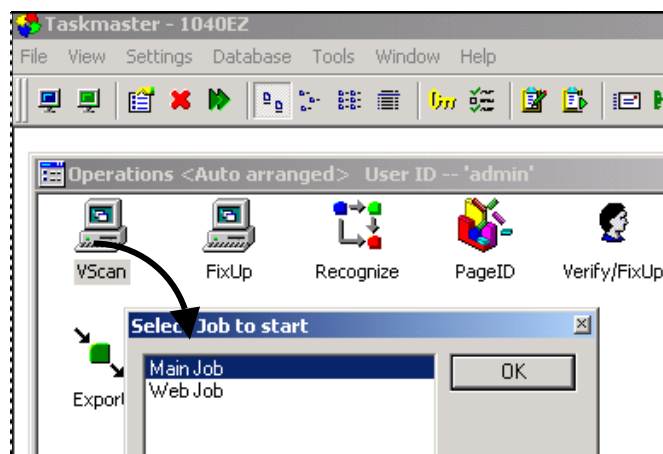
begin processing the next batch, in response to the specifications of the task's shortcut icon.

- ✓ This means that if you double-click on the *1040EZ* application's **Background** icon, Taskmaster will process all batches in the queues of the icon's tasks, without a break *and* without notice. However, because the **Verify /FixUp** icon has a *Manual for Hold Only* mode, *Taskmaster* will automatically move from the one batch to the next, but will display the **Batch Selection** dialog each time it begins a new batch.

Be careful! This option takes practice. If, for example, the *1040EZ Scan* icon is in *Automatic* mode, and launches VScan tasks only, the task might proceed without interruption – until you click on the **Task Monitor's** Stop button (Page 24).

Job Selection Dialog

If a shortcut represents a **Scan task** assigned to *more than* one **job** within an application, the **Select Job to Start** dialog appears automatically when you double-click on the Scan icon. To begin processing, you must first select a job and press the OK button.



Select Job to Start Dialog

The fields and functions of this dialog include:

Field/Function	Description
Job List	<p>A list of jobs covered by the shortcut.</p> <p>When defining the Scan shortcut (Chapter 6), an application's Administrator specifies which jobs are to be within the shortcut's scope. These jobs then appear in the Job List field.</p> <p>To initiate the Scanning process, you <i>must</i> highlight a job in this list and press the OK button, or double-click on the listing.</p>

Field/Function	Description
OK button	Starts up the Scan task assigned to the job you've selected in the Job List field.
Cancel button	Closes the <i>Select Job to Start</i> dialog without initiating any action and returns you to the <i>Operations</i> window.

- ☛ **Remember:** this dialog appears only if the **Scan** shortcut represents more than one job, and the same Scan task assigned to each.