
Tabs of the Taskmaster Administrator

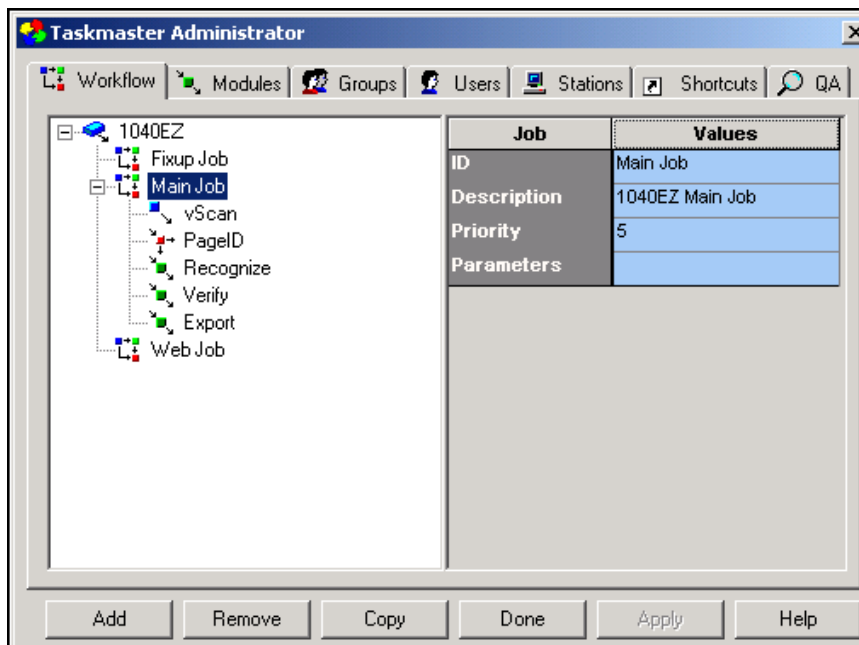
The *Taskmaster Administrator* defines an application's workflows, jobs and tasks - and the parameters of its Security Program. After an introduction to the *Taskmaster Administrator* itself, Chapter 6 explains the settings and use of its seven tabs.

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- ☛ This chapter of the *Windows & Dialogs Reference* introduces but does **not** deeply explore concepts and techniques governing the development of a Workflow Hierarchy, and the design of an Application Security program.
 - Chapter 6 of the *Guide to Taskmaster Rules* provides a complete explanation of workflows, and their job and task components.
 - Chapter 5 of the *Taskmaster Administrator's Guide* fully examines Application Security definitions and procedures.



Taskmaster Administrator – Workflow tab
1040EZ Workflow's Main Job

Taskmaster Administrator - Introduction

In the development and management of a *Taskmaster* application, Administrators use the *Taskmaster Administrator* to “define” everything from a Scan task to the shortcut icons of the *Operations* window (Chapter 3).

Administrators also use the *Taskmaster Administrator* to set up an application’s Security Program, with complete definitions of Users, User Groups, and Workstations.

These definitions are part of the application’s **Admin** database. Once an application is firmly in place, the tabs of the *Taskmaster Administrator* serve as invaluable sources of information. The pages which follow examine the role of each tab and details of its settings, and introduce the steps an Administrator takes to construct or modify these essential specifications.

Accessing the Taskmaster Administrator

To access the *Taskmaster Administrator*, select any item in the **Settings** menu of the *Taskmaster Window* (except **General**) or click on the **Taskmaster Administrator** icon in the toolbar.

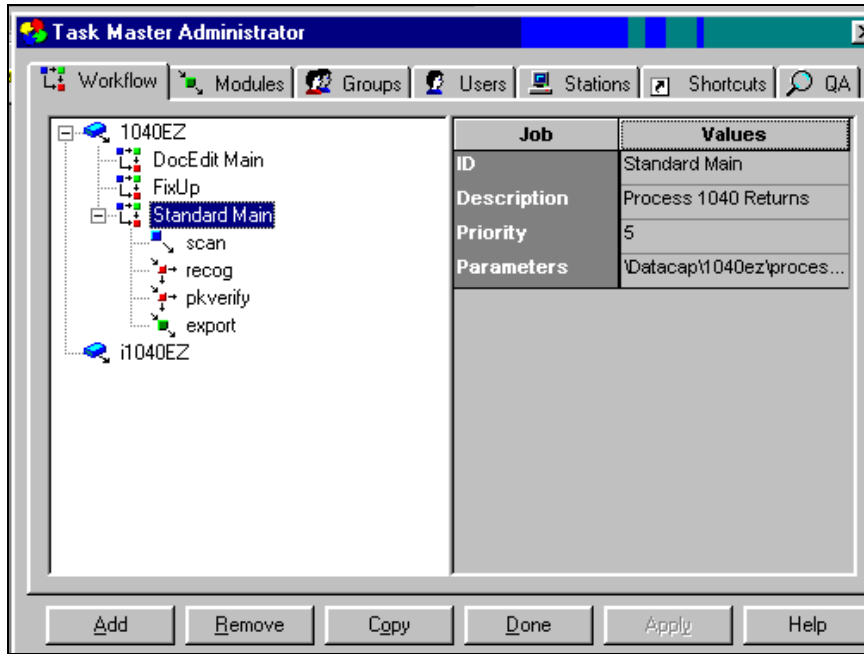


Taskmaster Window

- ✦ **Alert!** An application’s Security procedures place severe limits on access to the tabs and functions of the *Taskmaster Administrator*. If you experience any difficulty, consult your Administrator or a Datacap Support Specialist.

Taskmaster Administrator–Structure

The *Taskmaster Administrator* is a dialog with seven tabs, and six buttons in a line across the bottom.



Taskmaster Administrator–Workflow Tab

The table below summarizes the role of each tab and button; the table also indicates the page on which the full explanation of a tab begins.

Taskmaster Administrator–Tabs and Buttons

Tab/Button	Page	Description
Workflow tab	6	<p>Constructs an application’s Workflow Hierarchies.</p> <p>A Workflow Hierarchy consists of a workflow; one or more jobs that belong to the workflow; and one or more tasks assigned to each job.</p> <p>This tab formally defines each component, and assembles each hierarchy.</p>
Modules tab	20	<p>Displays the attributes of <i>Taskmaster’s</i> standard Task Modules - required components of the application’s tasks.</p> <p>You can use this tab to review or modify the attributes of a Task Module, or to define a new module.</p>

Taskmaster Administrator–Tabs and Buttons (continued)

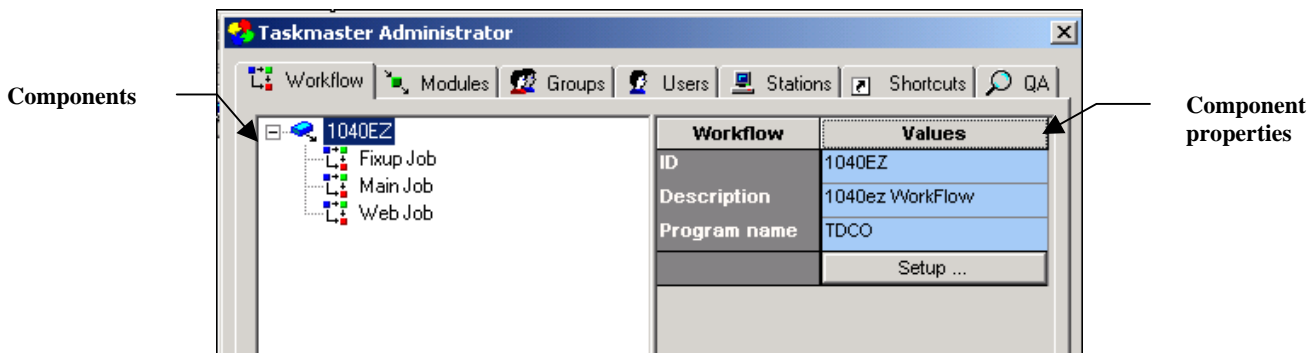
Tab/Button	Page	Description
Groups tab	37	<p>Defines an application’s User Groups.</p> <p>A User Group is a cornerstone of Application Security, and consists of individuals responsible for identical or similar activities.</p>
Users tab	25	<p>Sets up User Definitions for the men and women who carry out an application’s operations and procedures.</p> <p>User Definitions are required components of the application’s Security program.</p>
Stations tab	44	<p>Sets up a Station Definition for each workstation on which an authorized Taskmaster Client resides.</p> <p>An individual can access an application <i>only</i> from an authorized workstation, after entering a valid User ID and Password.</p>
Shortcuts tab	49	<p>Defines the Job-Task shortcut icons that appear in an application’s <i>Operations</i> window (Chapter 4).</p> <p>A shortcut’s definition includes the assignment of one or more Job/Task Combinations.</p>
QA tab	57	<p>Structures a special Quality Assurance “child” job.</p> <p>If a workflow includes a QA job, <i>Taskmaster</i> automatically branches to its task(s) in response to settings in this tab and in the applicable Job Definition.</p>
Add button	<i>n/a</i>	Clears a tab’s fields and settings, and readies the tab for a new definition.
Remove button	<i>n/a</i>	After appropriate warnings, deletes a definition from the Admin database.
Copy button	<i>n/a</i>	Copies a tab’s settings so that you can construct a similar definition with minimal effort.
Done button	<i>n/a</i>	Closes the <i>Taskmaster Administrator</i> .
Apply button	<i>n/a</i>	Adds the settings of a new <i>or</i> modified definition to the application’s Admin database.
Help button	<i>n/a</i>	Accesses <i>Taskmaster</i> Help.

Workflow Tab

In *Taskmaster*, the **workflow** is an operating superstructure. A workflow’s **jobs** manage sequences of data capture operations, and **tasks** carry out clearly focused, individual procedures for a job.

This structure is also a formal **hierarchy** with a workflow on the first level, jobs on the second level, and tasks on the third. A *Taskmaster* application **cannot** function until at least one workflow is in place...and its hierarchy complete.

The *Taskmaster Administrator’s* *Workflow* tab is the scene of your Workflow Development activities:



Taskmaster Administrator – Workflow tab
Workflow Properties

The **Components** area on the left side of the tab lists (or hides) the elements of a Workflow Hierarchy. The **Properties** area on the right lists a set of properties for an item you’ve highlighted in the **Components** list, and values for those properties.

The example above highlights the *1040EZ* workflow and its jobs, but does **not** list tasks for any job. (However, the tasks for the 1040EZ workflow’s FixUp and Standard Main jobs do appear in the illustrations on the next page.)

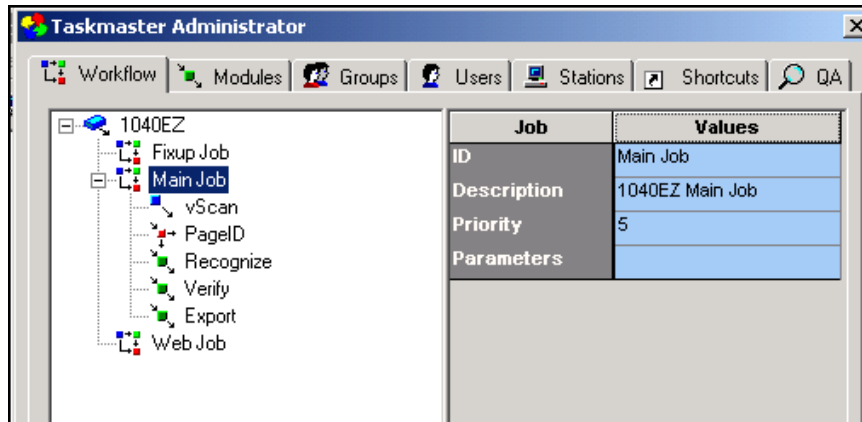
Because the Administrator has highlighted the Workflow ID (*1040EZ*) in the **Components** area, the **Properties** area displays a set of **Workflow** properties and their values.

In the illustration at the top of the next page, the Administrator opened the hierarchy by clicking on a Job ID one level below the Workflow ID. Highlighting *Main Job* in the **Components** area produced a list of that job’s **Properties** and their **Values** on the right.

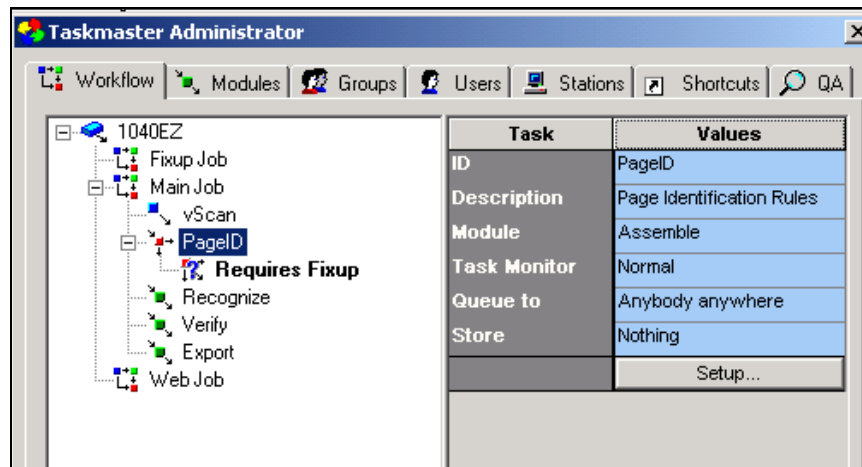
In the second illustration, highlighting a Task ID in the **Components** area generates a list of task-level **Properties** and **Values** for the *PageID* task.

- ✓ Upcoming pages describe the tab’s **Workflow**, **Job** and **Task** properties. These pages do **not**, however, cover the techniques an Administrator uses to develop and maintain a

Workflow Hierarchy and its components. Instead, Chapter 5 of the *Guide to Taskmaster Rules* deals exclusively and completely with this process.



**Taskmaster Administrator – Workflow tab
Job Properties**



**Taskmaster Administrator – Workflow tab
Task Properties**

The table below reviews the elements of the *Taskmaster Administrator's* Workflow tab.

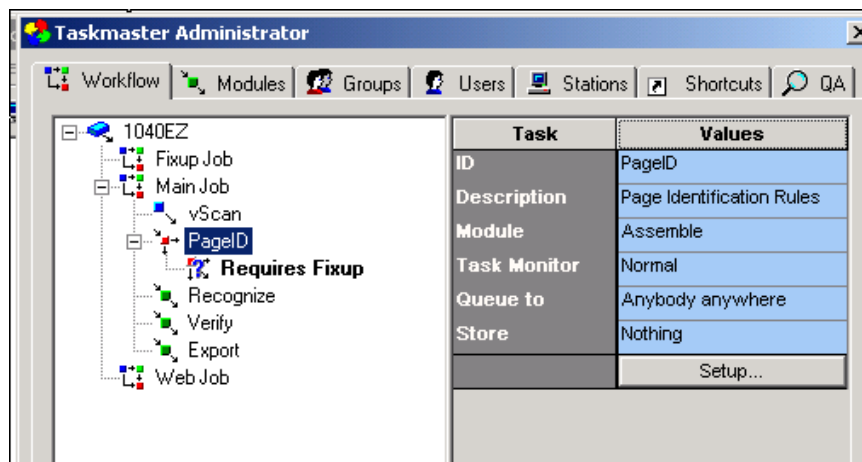
Field or Setting	Description
Components area	<p>This area lists one or more Workflow Hierarchies.</p> <p>A complete hierarchy consists of a workflow, its jobs(s), and the tasks assigned to each job.</p> <p>Right-clicking inside this area lists tools you can use to manage a hierarchy, and to assemble new workflows. For details, see Page 13.</p>

Taskmaster Administrator – Workflow Tab (continued)

Field or Setting	Description
Workflow	<p>A unique ID you have assigned to the workflow at the top of the Workflow Hierarchy, and an accompanying icon that signifies the component’s role.</p> <p><i>Alert!</i> An application can employ one workflow, or multiple workflows. <i>Taskmaster’s</i> pre-configured <i>Medical Claims</i> application, for example, employs a <i>HCFA</i> workflow to process <i>HCFA-1500</i> claims, and a separate <i>UB</i> workflow for <i>UB-92</i> claims.</p>
(Job)	<p>A unique ID you assign to a job that is part of the workflow, and an accompanying Job icon.</p> <p>A typical workflow consists of a Main job, one or more <i>child jobs</i> to carry out special operations, and a Web job that uses the Internet to process an application’s forms.</p>
(Task)	<p>The unique identifying code of a task that’s part of the job, and its Task icon.</p>
Properties Area - Workflows	<p>If you highlight a Workflow ID in the Components area on the left, the Properties area on the right lists workflow properties and values.</p> <p><i>Important!</i> You will use this area to set up a new workflow (see the <i>Guide to Taskmaster Rules.</i>)</p>
ID	<p>A unique identifying code you assign to the workflow.</p>
Description	<p>A brief but <i>important</i> description of the workflow’s focus and scope.</p>
Program Name	<p>A drop-down list with only one option: <i>be sure</i> you select <i>TDCO</i>.</p>
Setup button	<p>Accesses the workflow’s <i>Document Hierarchy Setup</i> window.</p> <p><i>Important!</i> The Document Hierarchy is an application’s central component - <i>and</i> a property of its workflow. The definition of the Document Hierarchy begins when you highlight the Workflow ID and click on this button.</p>

Taskmaster Administrator – Workflow Tab (continued)

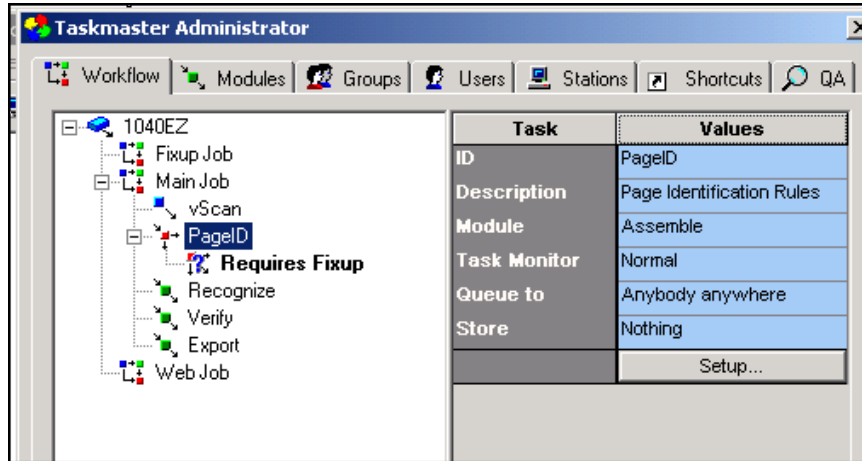
Field or Setting	Description
Properties Area - Jobs	If you highlight a Job ID in the Components area, this area lists job-level properties and values. <i>Important!</i> You will also use this area to set up a new job.
Job ID	A unique identifying code you assign to the job.
Description	A brief but <i>valuable</i> description of the job and its objectives.
Priority	The priority of batches processed by this job’s tasks: “1” is High; “10” is Low; “5” is the default value. (For more about this property, see Chapter 5).
Parameters	<i>Inactive for Job Definitions.</i>
Properties Area - Tasks	If you highlight a Task ID in the Components area, this area lists basic task properties and values. <i>Important!</i> You will also use this area as the first step in setting up a new task. However, a complete Task Definition requires numerous, additional specifications. The <i>Guide to Taskmaster Rules</i> and supporting Task Documentation explain these settings.
Task ID	A unique identifying code you assign to the task.



Task Properties – PageID task

Taskmaster Administrator – Workflow Tab (continued)

Field or Setting	Description
Description	A brief but <i>valuable</i> description of the task.
Module	The Task Module that determines the nature of a task’s setup criteria and operations. (For more about Task Modules, see Page 20.)
Task Monitor	<p>A drop-down list of options to determine the location of the Task Monitor on an operator’s screen:</p> <p><i>Normal:</i> the Task Monitor appears briefly when the task begins. It is then minimized and represented by an icon in the Status Bar.</p> <p><i>Always on Top:</i> the Task Monitor remains open and visible on the operator’s screen.</p> <p><i>Minimized:</i> the Task Monitor is minimized as soon as the task starts and represented by an icon in the Status Bar</p> <p>(Chapter 4 describes the Task Monitor.)</p>
Queue to	<p>A drop-down list with options to determine whether or not this task is to be run by a station designated earlier in the workflow.</p> <p>The setting you select operates in conjunction with the Store setting of an earlier task.</p> <p>Page 12.explains the Queue to and Store properties.</p>
Store	Options to determine if this task will add the current Station ID to the Engine database and thus enable the Queue to property of an upcoming task.



**Taskmaster Administrator – Workflow Tab
Task Properties**

Taskmaster Administrator – Workflow Tab (continued)

Field or Setting	Description
Add button	<p>Removes data from the tab's Properties area so you can define a new component <i>one step down</i> in the Workflow Hierarchy.</p> <p>If you highlight a Workflow ID in the Components area and press this button, you <i>must</i> supply <i>Taskmaster</i> with a new Job ID. Similarly, if you highlight a Job ID and press the Add button, <i>you</i> must enter a new Task ID.</p> <p>If, however, you select a Task ID, the Add button becomes unavailable.</p>
Remove button	<p>After a proper warning, deletes the component you've selected.</p> <p>Be very careful! Clicking on this button also removes a component's elements. Deleting a workflow, for example, automatically expunges its jobs and their tasks.</p>

“Store” and “Queue to” Properties of a Task Definition

Taskmaster Administrator – Workflow Tab (continued)

Field or Setting	Description
Copy button	<p>Copies a component you’ve highlighted according to the following scheme:</p> <p>Workflow. Adds a new workflow <i>after</i> you supply a name but does <i>not</i> copy the source workflow’s elements.</p> <p>Job. Copies the source job and its tasks to a <i>different</i> workflow after you provide a new Job ID.</p> <p>Task. Copies the source task to a different job.</p> <p>This button duplicates the features of the Components area’s Copy option (Page 13).</p>
Done button	Closes the <i>Taskmaster Administrator</i> .
Apply button	Adds new or modified component values to your application’s Admin database.
Help button	Accesses <i>Taskmaster Help</i> .

“Store” and “Queue to” Properties of a Task Definition

The **Store** and **Queue to** properties of a Task Definition determine which operators and workstations can process individual batches. (Chapter 5 reviews the impact of these settings.)

The **Store** property looks forward; the **Queue to** property looks backwards.

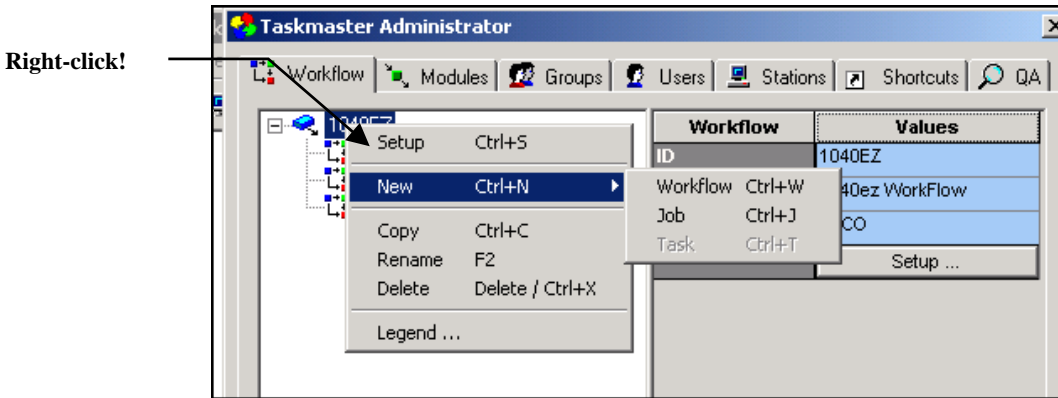
In the *Workflow* tab of the *Taskmaster Administrator*, the **Queue to** and **Store** fields are drop-down lists that display their values when you click once on the field. The following table lists and explains these options.

Store... →	Queue... ←	Explanation
“None” or “Station ID and User ID”	<i>Anywhere, Anytime</i>	The <i>Anywhere, Anytime</i> value allows any operator and Station ID to process batches in the task’s queue – and thus overrides the Station ID and User value assigned to an earlier task’s Store property.
“Station ID” or “Station ID and User ID”	“by Station”	The task can process only those batches previously processed from the same workstation ID.
“UserID” or “Station ID and User ID”	“by User”	The task can process only those batches previously processed by the same operator.

Store... →	Queue... ←	Explanation
“Station ID” or “Station ID and User ID”	“by Other Station”	The task can process only those batches previously processed from a different workstation ID.
“Station ID and User ID”	“by Station and User”	The task can process only those batches previously processed by the same operator, from the same workstation ID.
“Station ID and User ID”	“by Station and other User”	The task can process only those batches previously processed by a different operator, from the same workstation ID.
“Station ID and User ID”	“by User and Other Station ”	The task can process only those batches previously processed by the same operator, from a different workstation ID.
“Station ID and User ID”	“by other Station and other User ID”	The task can process only those batches previously processed by a different operator, from a different workstation ID.

Tools of the Workflow Tab

If you right-click your cursor on a workflow component, options identifying a set of Workflow Management tools appear:



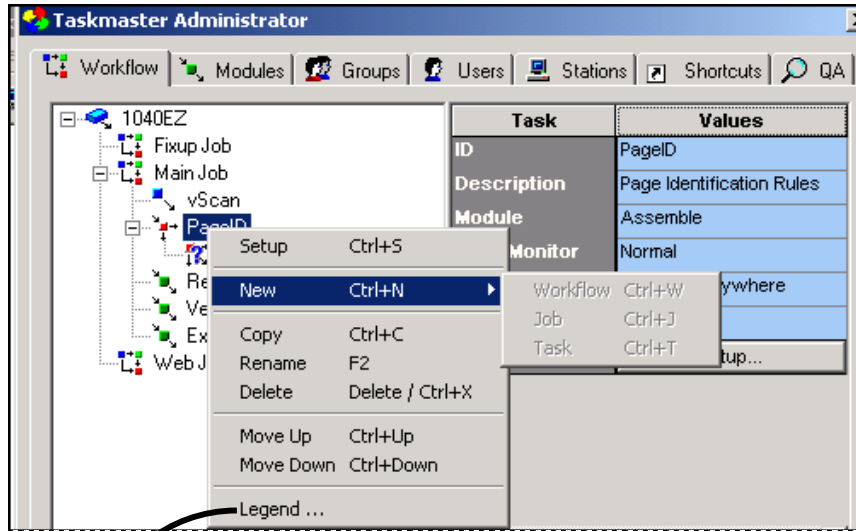
**Taskmaster Administrator – Workflow Tab
Workflow Management Tools (Workflows)**

The number and availability of these tools change in response to the component you’ve selected:

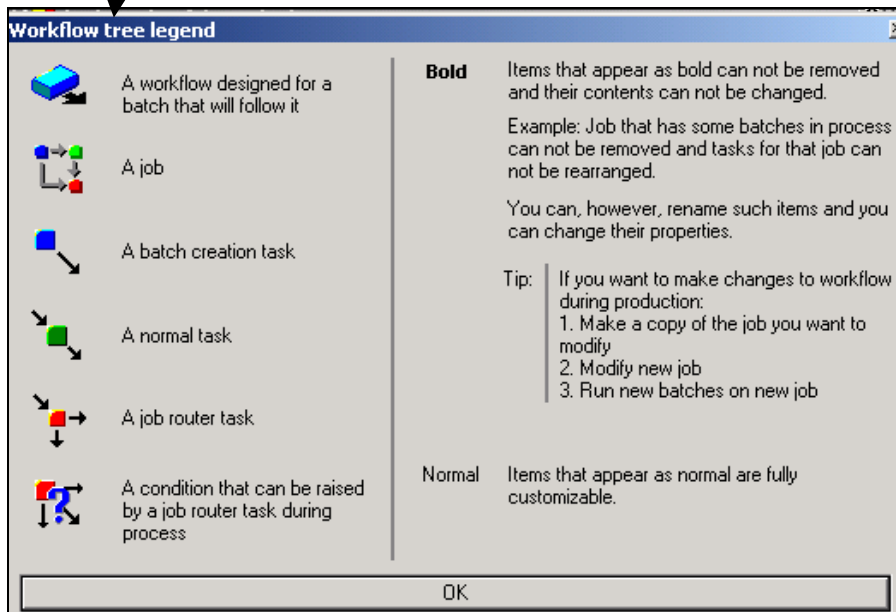
- The example above shows the Workflow Management tools available when you highlight a **Workflow** component. Note that the **New...Task** option is *not* available at this level.

Tools of the Workflow Tab

- The example below lists tools for the management of **Task** components. The tools include techniques for changing the order of tasks in a job. At the task level, however, none of the **New** options is available.
- To use a tool, click on its title or use the applicable keyboard alternative.
- You can use buttons of the *Taskmaster Administrator* to duplicate most Workflow Management tools.
- Clicking on the **Legend** option displays explanations of the icons at each level of the hierarchy...and in front of most tasks.



**Taskmaster Administrator – Workflow Tab
Workflow Management Tools (Tasks)**



Workflow Management Legend

The table below explains the role of each Workflow Management tool.

Tool	Keyboard, Button	Description: Workflow, Job and Task
Setup	Ctrl + S Setup button	Workflow: accesses the <i>Document Hierarchy Setup</i> window. Task: accesses the <i>Task Setup</i> dialog for a task component you've highlighted.
New	Ctrl + N Add button	Opens a subset with three options: new <i>Workflow</i> , new <i>Job</i> and new <i>Task</i> . The availability of the options depends on the component you've highlighted. Alert! The Add button and Ctrl + N keyboard combination place an "empty" component <i>one level down</i> in the Workflow Hierarchy. You cannot proceed until you supply the new component with an ID and, in the case of a new task, with a Task Module (Page 20).
Workflow	Ctrl + W	Adds a new workflow to the application. This option is available if you have highlighted a workflow or job component, or if the Components area is empty. Alert! You can use the Ctrl + W keyboard combination at any time to insert a blank workflow component into the application's hierarchy.
Job	Ctrl + J Add button	Adds a new job to a workflow. This option is available <i>only</i> if you have highlighted a Workflow ID in the Components area. Alert! To insert a new job, you can use the Ctrl + J shortcut or Add button only if you first highlight a Workflow ID.
Task	Ctrl + T	Adds a new task to a particular job. This option is available <i>only</i> if you have highlighted a Job ID in the Components area. Alert! To insert a new task, you can use the Ctrl + T shortcut or the Add button <i>only</i> if you first highlight a Job ID.

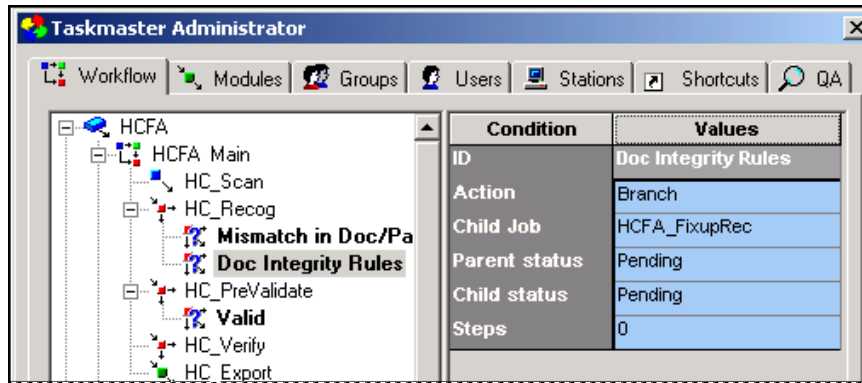
Workflow Management Tools (continued)

Tool	Keyboard, Button	Description: Workflow, Job and Task
Copy	Ctrl + C Copy button	<p>Workflow: copies an existing workflow component but does <i>not</i> copy the workflow's jobs or tasks.</p> <p>Job: copies an existing job and <i>duplicates</i> its tasks; provides the job with a new Job ID; and links the job to the same workflow or to another workflow.</p> <p>Task: copies an existing task; provides it with a new Task ID; and links the task to the same job or to another job, in the same workflow or another workflow.</p>
Rename	F2 function key	Lets you assign a new ID to a workflow, job or task.
Delete	Delete, Ctrl + X Remove button	<p>Workflow: <i>deletes</i> the workflow but <i>withdraws</i> its jobs and their tasks. This means that the workflow's Job and Task Definitions remain in the application's Admin database, where they are available for further Workflow Development steps.</p> <p>Job: <i>deletes</i> the job but <i>withdraws</i> its tasks. As a result, the Task Definitions remain in the application's Admin database and are immediately available for Workflow Development.</p> <p>Task: deletes a task if it is the only instance of this task in any job of any workflow. Remember: copying a job (above) duplicates its tasks. If there is an identical task anywhere else in the hierarchy, this option removes the highlighted task from its job but does not eliminate the Task Definition from the Admin database.</p>
Move Up	Ctrl + Up	<p>Moves a Task ID one position <i>up</i> within the job's list of tasks.</p> <p>Important! This list determines the order in which a job's tasks run.</p>
Move Down	Ctrl + Down	Moves a Task ID one position <i>down</i> in the task list, and the task one position back in the processing sequence.
Legend	n/a	<p>Accesses the <i>Workflow Tree Legend</i> dialog.</p> <p>This dialog describes the icons which appear beside the Workflow, Job and Task IDs in the Components area.</p>

Child Jobs

In the illustration below, when the HC_Recog task of the *Medical Claims* application's *parent* HCFA Main job encounters a “problem” batch, the task diverts the batch to a *child* job for review and remediation.

Two processing conditions appear below the *HC_Recog* Task ID: *Mismatch in Doc/Page Count* indicates that the batch has the wrong number of documents or pages; *DocIntegrity Rules* alerts the task that one or more documents with the wrong Page Types or page counts. (Chapter 10 of the *Guide to Taskmaster Rules* shows you how to define a processing condition.)



**Taskmaster Administrator – Workflow Tab
Job Rule Definition**

When you highlight a processing condition in the **Components** area on the left side of the *Workflow* tab, settings on the right side define the task's response:

Job Rule Property	Description
ID	The title of an exceptional processing condition. Conditions that a task can encounter are part of its Task Definition, and are designated in the <i>General</i> tab of the Task Settings dialog (Chapter 5 of the <i>Guide to Taskmaster Rules</i>).
Action	A drop-down list of alternative responses a task can take when it encounters the condition. The standard actions include: <i>None</i> , <i>Branch</i> , <i>Jump</i> , <i>Split</i> , <i>Stop</i> and <i>Hub</i> . For an explanation of each action, see Page 19

Properties of a Task Condition (continued)

Job Rule Property	Description
Child Job	<p>A drop-down list of other jobs in the current workflow.</p> <p>You must enter the Job ID of a <i>child</i> job if the condition calls for a <i>Branch</i>, <i>Split</i>, or <i>Hub</i> action.</p> <p>Alert! A <i>parent</i> job and a <i>child</i> job must be part of the same Workflow Hierarchy.</p>
Parent Status	<p>The processing status that <i>Taskmaster</i> will assign to a batch after the <i>parent</i> job has processed that batch.</p> <p>There are two statuses:</p> <p><i>Pending</i> indicates that the batch is in an active processing mode and does not require operator and Supervisor intervention.</p> <p><i>Hold</i> links a batch directly to a user – to an operator or Supervisor. This status requires the intervention of that user to return the batch to the <i>parent</i> job’s workflow.</p>
Child Status	<p>The status that <i>Taskmaster</i> assigns to the batch before processing by the <i>child</i> job begins.</p> <p><i>Pending</i> indicates that any operator or Supervisor can initiate processing of the batch by the <i>child</i> job.</p> <p><i>Hold</i> limits access to the batch to the operator or Supervisor responsible for diverting it from the <i>parent</i> to the <i>child</i> job.</p>
Steps	<p>The task in the <i>parent</i> job to which the batch returns after processing by the <i>child</i> job:</p> <p><i>Blank</i> (no value) prevents the <i>child</i> job from returning the batch to the <i>parent</i>.</p> <p><i>Zero</i> (0) returns the batch to the originating task in the <i>parent</i> job.</p> <p><i>Positive</i> (+1, for example) forwards the batch to a task further along the <i>parent</i> job.</p> <p><i>Negative</i> (-1, for example) returns the batch to task earlier in the job.</p> <p>Alert! If the Task Definition includes a <i>Jump</i> action, this property determines which task in the <i>current</i> job will be next to process the batch.</p>

Standard Processing Actions

A Task Definition that includes a processing condition *must* specify the action the task is to take when it encounters the condition.

The actions include:

None. This is the default, temporary setting you can use as you assemble the task's response: it makes certain that there is no impact on the processing of a batch.

Branch. This action diverts the batch that the task is processing from the *parent* job to the task(s) of a *child* job. When the *child* job is finished, the batch returns to the *parent* job. **Alert!** A workflow can contain a *child* job **hierarchy** in which a task in a *child* job branches to a *child* job on a lower tier. In this situation, the first *child* job becomes the parent to the second *child* job.

- ✓ Most conditions lead to the *Branch* action.

Jump. This action is a processing shortcut that skips one or more tasks in the workflow, and places the batch in a more advanced position, or in an earlier position. The *jump* action uses a value in the **Steps** property to indicate the next task, and does not involve the use of a *child* job.

Split: The *Split* action splits one or more documents from the current batch. The task in the *parent* job creates a sub-batch, adds the document(s) to it and sends the sub-batch to a *child* job for special processing. While the *child* job takes care of the sub-batch, the *parent* job processes the remaining documents in the batch. The *child* job does *not* return the sub-batch to the *parent* job when processing is complete.

Stop: This action terminates *Taskmaster's* processing of the batch.

Hub: The *Hub* action combines features of the *Branch* and *Split* actions. *Hub* splits documents from the batch, adds them to sub-batches, and delivers the sub-batches to various *child* jobs. When the *child* jobs have processed the sub-batches, they return to the *parent* jobs.

Modules Tab

A Task Module provides a task with its power and personality. When you are defining a new task, the *required* designation of a Task Module ultimately determines:

- ◆ The nature of the task's specifications.
- ◆ How the task carries out its operations.
- ◆ Where and how the task maintains exceptional links.
- ◆ The way in which the task will process documents, pages and data.

Processing condition

Task	Values
ID	PageID
Description	Page Identification Rules
Module	Assemble
Task Monitor	Normal
Queue to	Anybody anywhere
Store	Nothing
	Setup...

Module ID

Task Definition – *PageID* task

Task Module	Values
ID	Assemble
Description	Assemble Pages
Type	Job router
Program name	Batch Pilot DLL
Parameters	cess\RRAssemble.bpp
Statistics table	
Batch ID field	
	Test

Type = Job Router

Task Project (.bpp)

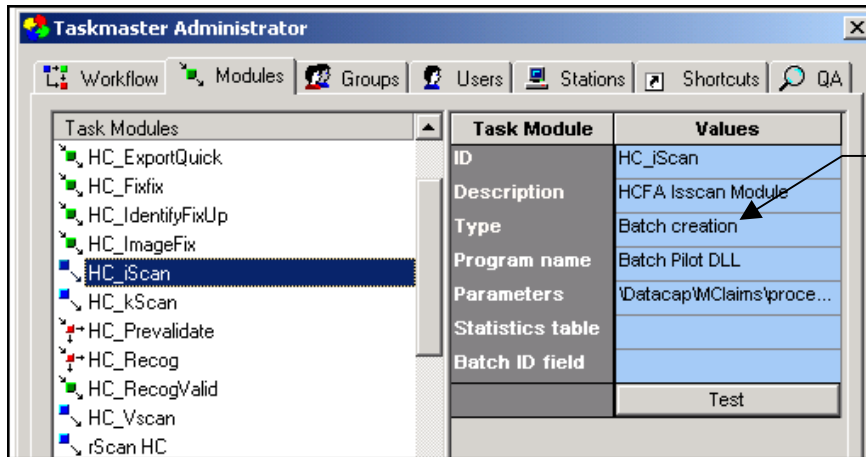
Taskmaster Administrator – *Modules* tab

The **Task Modules** field on the left side of the *Taskmaster Administrator's* *Modules* tab lists the Task Modules for a *Taskmaster* application such as *1040EZ* (in this case). When you highlight a Module ID, its properties appear in the fields on the right.

- ✓ As you review the properties of a Task Module, pay attention to the relationship between the Task Definition's stated condition – *Requires FixUp* – and the Assemble module's **Type** property.

The table below describes the fields of the *Modules tab*.

Field or Setting	Description
Task Modules	<p>A list of Task Module IDs identifying an application's active Task Modules.</p> <p>The Datacap Taskmaster Installation process (see the Taskmaster 7.5 Installation and Configuration Guide for details) provides default core Task Modules. Later, any modules <i>you</i> define also appear in this list.</p> <p>Highlighting a Module ID displays its properties in the fields on the right side of the tab. The example on the previous page shows the properties of an Assemble module: this module is the foundation for tasks that identify the pages in a batch according to their Page Types.</p>
Task Module Properties	The characteristics of a Task Module you've selected from the Task Modules list.
ID	A unique code identifying the Task Module.
Description	A brief description of the module.
Type	<p>A drop-down list with three designations: <i>Normal</i>, <i>Batch Creation</i>, and <i>Job Router</i>.</p> <p>A module's Type determines the ability of a task based on this module to handle special functions. This is a required specification for each Task Module:</p> <p><i>Normal</i>: tasks based on this module cannot create new batches, or divert batches to from a parent job to a child job.</p> <p><i>Batch Creation</i>: tasks based on this module can generate new batches. Scan tasks fall into this category.</p> <p><i>Job Router</i>: a task based on this module can divert the batch it is processing from the parent job containing the task to a child job for special attention (Page 17).</p> <p><i>Batch Creation Router</i>: a task based on this module can create a batch and, if appropriate, divert it to a child job.</p> <p>Important! Type is a fundamental attribute of any Task Module and, therefore, of any tasks that employ the module. You can, however, define additional modules which are identical in every way except the designation of Type. For details, see the <i>Guide to Taskmaster Rules</i>.</p>



Module type =
Batch
Creation

**Taskmaster Administrator – Modules Tab
HC_iScan Module**

Taskmaster Administrator - Modules Tab (continued)

Field or Setting	Description
Program Name	The link between the Task Module’s definition and the software <i>environment</i> responsible for a task’s setup and operations. <i>Alert! Batch Pilot DLL is the required value for this property.</i>
Parameters	The link to a Task Project (.bpp) with forms and settings that are unique to the task (below).
Statistics Table	<i>Not applicable.</i>
Batch ID field	<i>Not applicable.</i>
Test Button	Tests the Program Name value (above) to be sure it successfully links this Task Module to the applicable Task Project.

- The value in the **Parameters** field has this syntax (using the pre-configured *Medical Claims* application as an example):

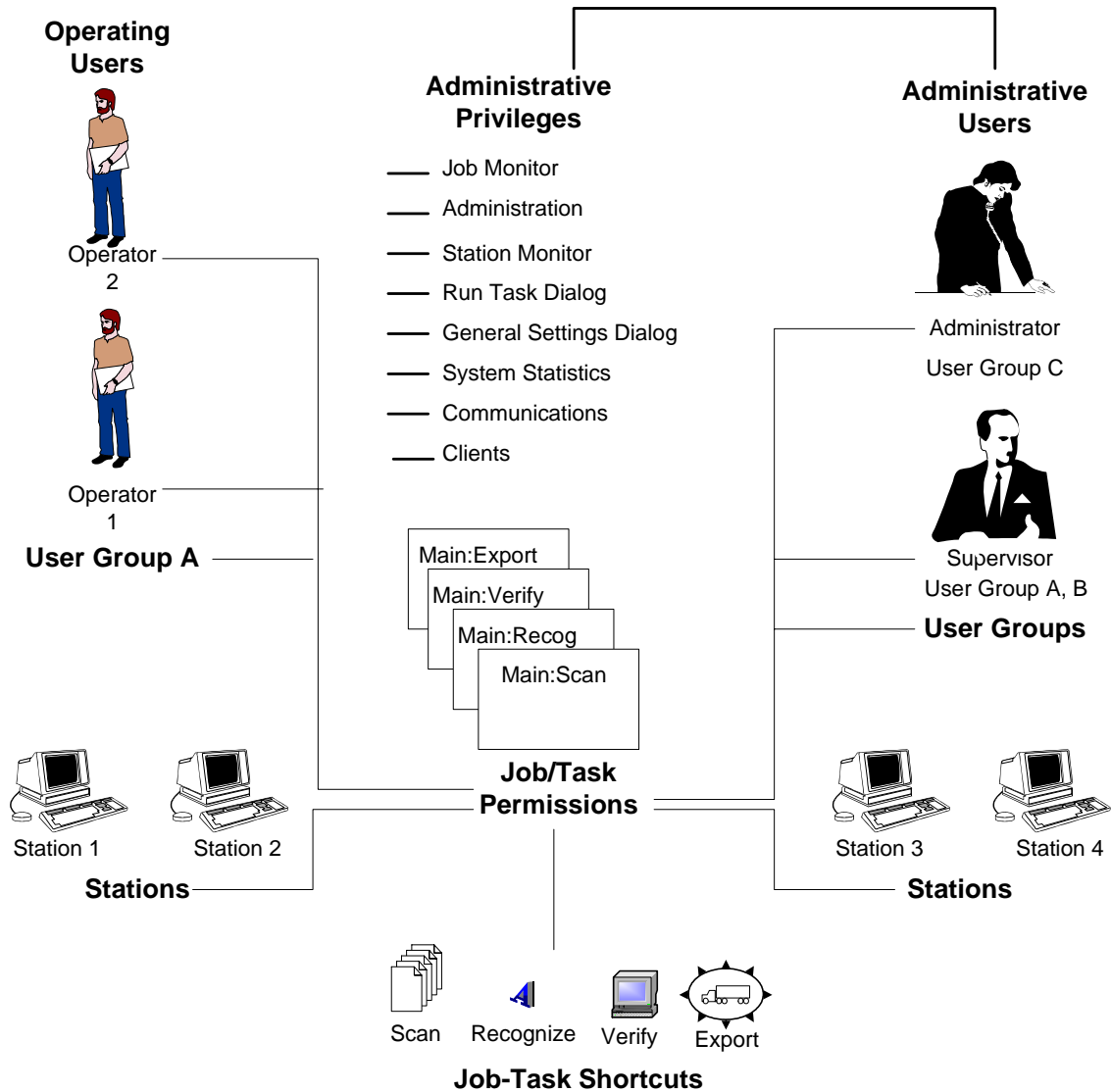
```
\\Datacap\Mclaims\process\HC_iScan.bpp
```

This specification links the HC_iScan **Task Definition** to the HC_iScan **Task Project**. The Task Project, in turn, contains forms with the Task Definition’s *setup* criteria – and its *runtime* forms and code. Chapter 6 of the *Guide to Taskmaster Rules* explains the role of the Task Project in a task’s construction and operation.

Users Tab

Introduction to Application Security

An application's Administrator is responsible for maintaining the security of a *Taskmaster* application on four levels: **User**, **User Group**, **Station** and **Shortcut**.



Users: individuals within your organization who access *Taskmaster* data and run a workflow's jobs and tasks.

User Groups: multiple users responsible for the same task(s) or administrative activities (Page 37).

Stations: network computers that launch Taskmaster Client activity—retrieving and processing jobs, tasks, batches and files (Page 44).

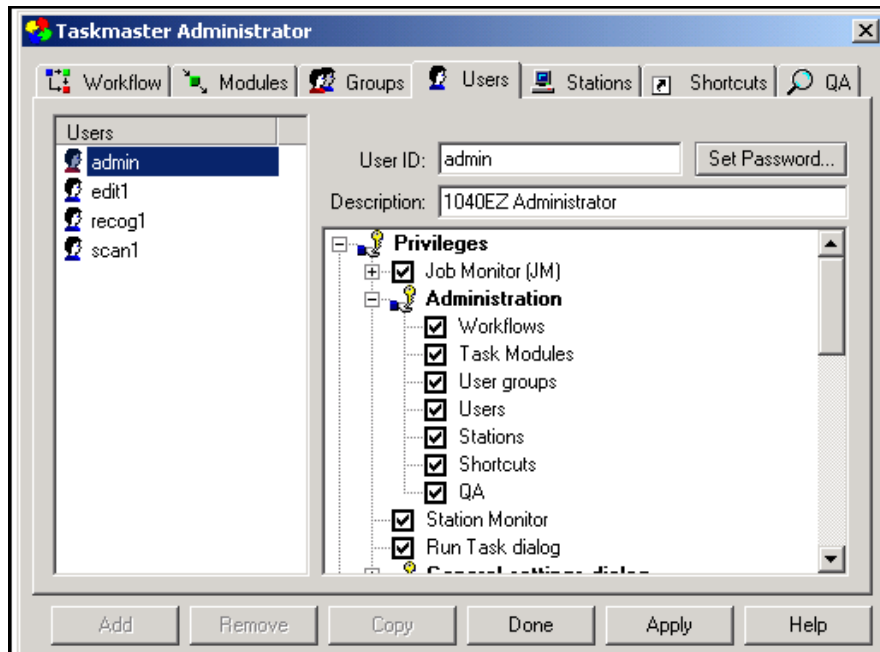
Shortcuts: the shortcut icons that launch an application’s Job/Task Combinations (Chapter 3).

Taskmaster Security provides an Administrator with four control mechanisms:

- **ID Codes.** The unique access codes assigned to each station and user.
- **Permissions.** Formal permission granted to individual users, User Groups, workstations *and* shortcuts to carry out one or more Job/Task Combinations but *only* those Job/Task Combinations.
- **Administrative privileges.** Formal permission allowing a user to participate in *Taskmaster’s* Administrative procedures.
- **Job-Task shortcuts.** Definitions that permit icons in the *Operations* window to launch one or more Job/Task Combinations. **Alert!** Operations cannot commence until user, station and shortcut have an identical Job-Task permission.

To set up an application’s Security program, you’ll use the Security tabs of the *Taskmaster Administrator*. To access the *Taskmaster Administrator*, select **Groups**, **Users**, **Stations** or **Shortcuts** from the **Settings** menu of the *Taskmaster Window*.

- ✓ For a complete explanation of *Taskmaster* Security, see Chapter 5 of the *Taskmaster Administrator’s Guide*. The discussions in this section examine details of the four Security tabs: *Groups*, *Users*, *Stations* and *Shortcuts*.



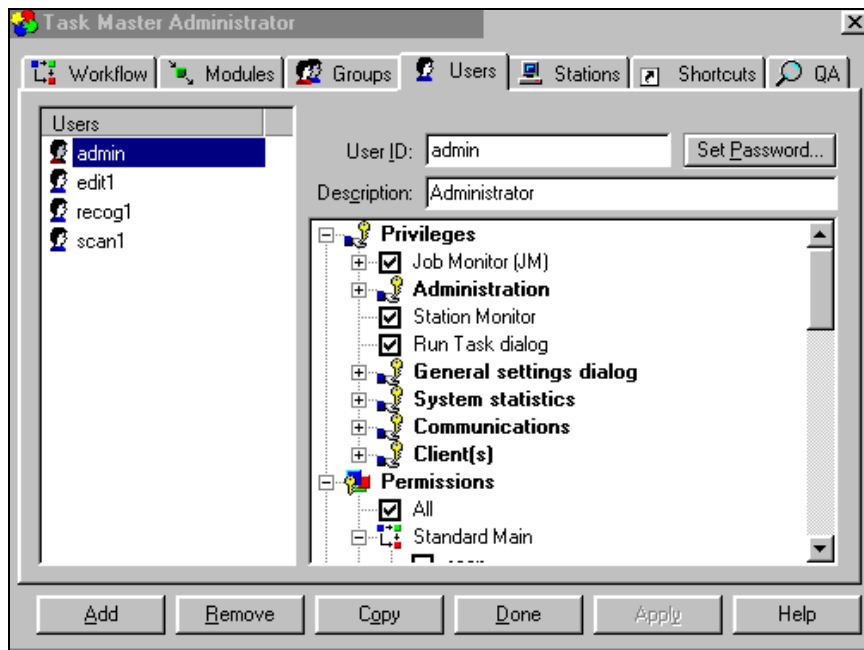
Taskmaster Administrator – Users Tab
1040EZ Application

Settings of the Users Tab

Application Security requires a series of formal User Definitions.

A User Definition begins when you assign a unique User ID and a Password to an operator, a supervisor...even to yourself. *Taskmaster* will then give this individual access to the application *if* he or she can supply this combination of codes.

You can then fill out the User Definition with qualifications of three types: **Privileges**, **Permissions** and **Groups**. A full discussion of these qualifications begins on Page 27. First, take a moment to review the fields and functions of the *Users* tab.



Taskmaster Administrator – Users Tab

Field/Function	Explanation
User List	A list of User IDs representing the User Definitions you've compiled. <i>Taskmaster</i> can add a new User ID to this list only <i>after</i> you've provided the user with a Password (see the next page) and press the Apply button (below).
User ID	A unique identifying code you assign to the user (and to the User Definition). The user needs this code (and a Password) to sign on to an application.
Description	A brief description of the user and his or her responsibilities.

User Authentication and Passwords

Users Tab (continued)

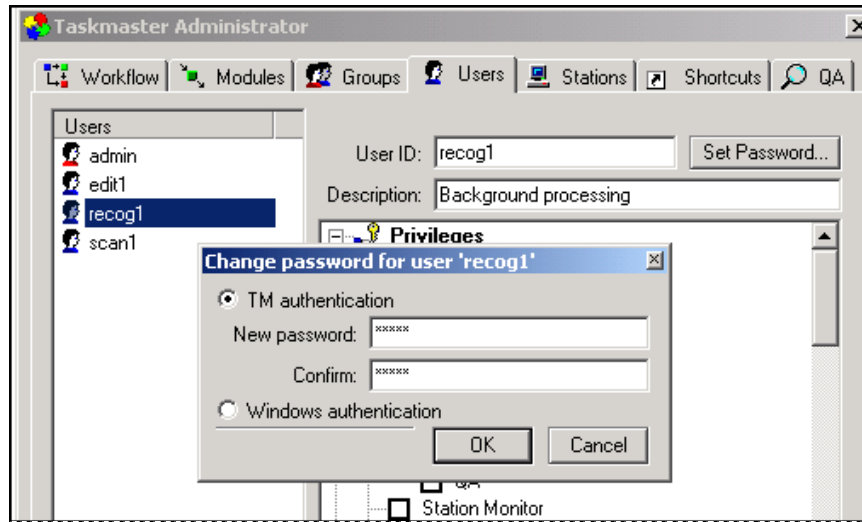
Field/Function	Explanation
Set Password button	Accesses the <i>User Password</i> dialog. You'll use this dialog to add or change a Password <i>and</i> assign an Authentication mode.
Qualifications	A list of all possible user qualifications, in three categories: Administrative Privileges , Job-Task Permissions , and User Group affiliations. When you define a new user, you'll select applicable qualifications from this list.
Add button	Clears the User ID and Description fields so you can construct a new User Definition Alert! You <i>must</i> click on this button to initiate the definition process.
Remove button	Deletes the User Definition you've highlighted in the User List , after a proper warning.
Copy button	Creates a new User Definition by copying an existing definition.
Done button	Closes the <i>Users</i> tab after you've assembled, modified or reviewed a User Definition.
Apply button	Adds a new User ID to the Users List (after you've supplied a Password) or updates an existing User Definition with your changes.
Help button	Accesses <i>Taskmaster</i> Help.

User Authentication and Passwords

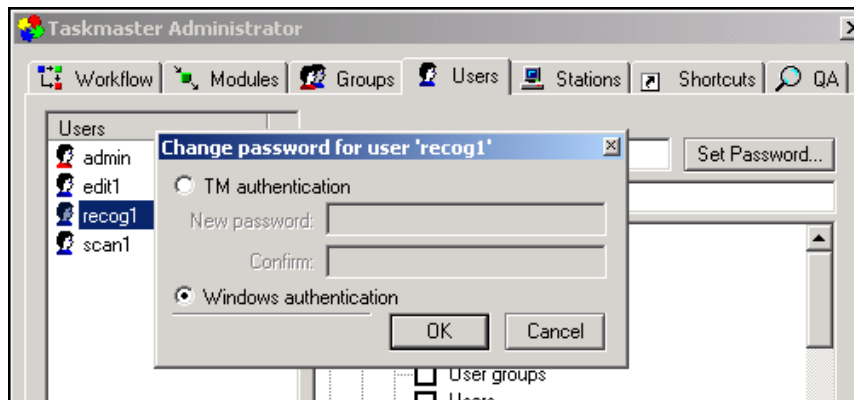
One of the first steps you take when you define a new user is to click on the Set Password button. This leads you right to the *Change Password* dialog (illustrated on the next page), which has two **Authentication** options. You must select one:

- **TM authentication** means that an individual can access the application *only* if he or she can provide the **User ID** you entered in the *Users* tab, and the **Password** you enter and confirm in the *Change Password* dialog.
- **Windows authentication** requires that the **User ID** you entered in the *Users* tab is *identical* to the ID with which the individual signs onto the Windows environment containing this *Taskmaster* application. Selecting this option “grays out” the dialog’s other settings. Later, *Taskmaster’s* sign-on procedures will bypass the customary *User ID & Password* dialog - and open the application without delay - *if* the ID that gives the user access to Windows is the same as an

ID you added to the Users list, and backed up with Windows Authentication.



Change Password dialog – Taskmaster Authentication



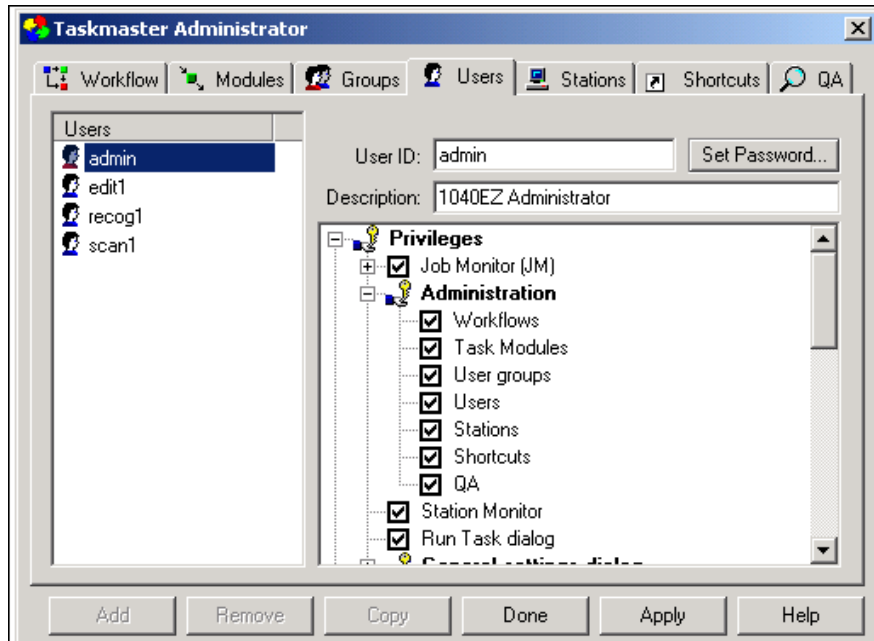
Change Password dialog – Windows Authentication

User Qualifications: Privileges, Permissions and Group Assignments

Administrative Privileges

A User Definition designates and limits the ability of an individual to access administrative dialogs and data, and to carry out administrative functions. These attributes become the user's **Administrative Privileges**.

Assigning privileges is an important aspect of the User Definition process. *Most users* in a typical application have few, if any, administrative responsibilities.



**Taskmaster Administrator—Users Tab
Administrative Privileges**

The table below the chart explains each option.

- ✓ To assign a privilege to a User Definition, click on the check box next to it in the list. Later, when you press the Apply button to save the settings of the User Definition, *Taskmaster* will add this specification to the database.
- ✓ Because the options in this list represent Administrative activities, User Definitions for task operators do *not* usually include any of these options.
- ☛ Be sure to give careful consideration to the nature and impact of a privilege *before* assigning it to a user.
- ✓ *Taskmaster* allows you to assign Administrative Privileges to all members of a User Group. The *Taskmaster Administrator's* Groups tab sets up special-purpose groups (Page 37).

User Definitions—Administrative Privileges

Privilege	Description
Job Monitor	<p>Gives the user access to the batch listings of the Job Monitor as they appear within the Taskmaster Window.</p> <p>Selection of this option also leads to additional privileges associated with the use of the Job Monitor. These additional privileges appear at the next level of the hierarchy (described below); in most cases, they involve the selection of menu items from the Taskmaster Window when the Job Monitor is active. (For details, see Chapter 5).</p>
More than one Job Monitor	<p>Gives the user the right to work with multiple Job Monitors concurrently by selecting New Monitor from the View menu - or by working with the Job Monitor Manager (Chapter 5).</p>
Delete Batches	<p>Provides access to the Delete item in the Record menu of the Taskmaster Window, giving the user the ability to delete processed batches.</p>
Status Change/Roll-back	<p>Provides access through the Record menu to the Status Change/Rollback dialog, allowing the user to “roll back” a batch to an earlier task.</p>
Priority/Operator/Station Change	<p>Provides access to the Change Properties item of the Record menu and, as a result, to the Change Operator/Priority dialog.</p> <p>With this privilege, a user can assign a new operator to a batch, or change its priority in a task’s processing queue.</p>
Batch Attributes Change	<p>Gives the user access to the Batch Attributes item of the Record menu and its Batch Attributes dialog.</p> <p>After highlighting a batch in the Job Monitor, a user with this privilege can modify its Batch ID, assign the batch to a new Batch Directory, or link it to a different Page file.</p>
Job Attributes Change	<p>Provides access through the Record menu to the Batch History dialog.</p>
Custom Field Properties Change	<p>Provides access to the Custom Field Properties dialog by way of the Record menu <i>if</i> you have added a “custom” column to the Job Monitor’s Batch Information Table.</p>
Save Layout	<p>Gives the user access to the formatting functions of the File menu’s Header/Footer item, and lets the user save changes to the Job Monitor’s layout.</p>

User Definitions—Administrative Privileges (continued)

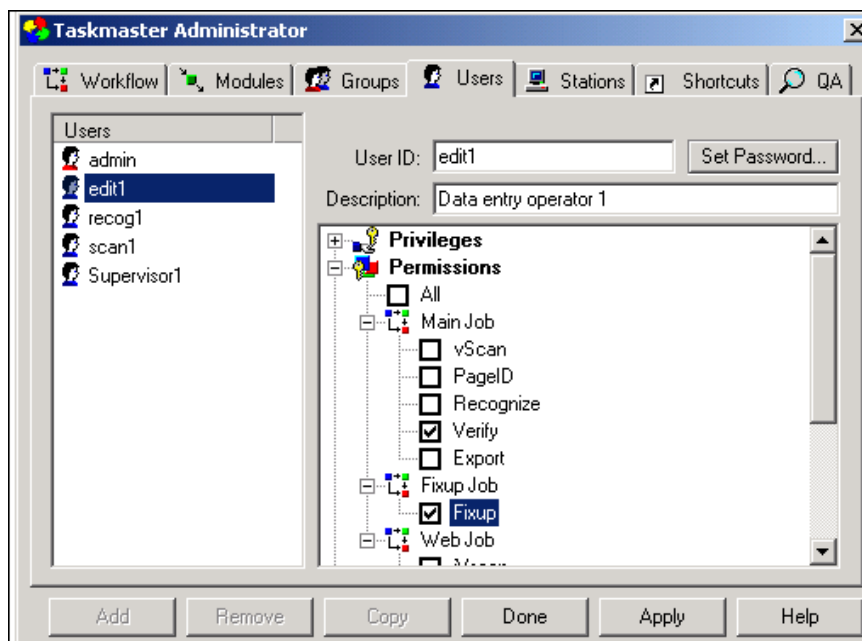
Privilege	Description
Administration	<p>These options give the user access to the tabs of the <i>Taskmaster Administrator</i> - tab by tab.</p> <p>Be careful! Selecting an option from this list gives the user access to information, procedures and settings normally reserved for the Administrator.</p>
Workflow	<p>Provides access to the <i>Workflow</i> tab.</p> <p>A user with this privilege can review parameters of existing workflows, jobs and Job/Task Combinations—and define new Workflow Hierarchies (Page 6).</p>
Task Modules	<p>Provides access to the <i>Task Modules</i> tab.</p> <p>A user with this privilege can review and modify the definition of any Task Module (Page 20).</p>
User Groups	<p>Gives the user access to the <i>Taskmaster Administrator's Groups</i> tab.</p> <p>A user with this privilege can review the structures of existing User Groups and define new groups (Page 37).</p> <p>Be very careful: the <i>User Groups</i>, <i>Users</i>, and <i>Stations</i> tabs are central components of Application Security. Access to these tabs should be strictly limited.</p>
Users	<p>Provides access to the <i>Users</i> tab.</p> <p>Any user with this privilege can review details of existing User Definitions and set up additional User Definitions (Page 23).</p>
Stations	<p>Provides access to the <i>Stations</i> tab.</p> <p>A user with this privilege can review the security parameters of each workstation and set up additional stations (Page 44).</p>

User Definitions—Administrative Privileges (continued)

Privilege	Description
Shortcuts	Provides access to the <i>Taskmaster Administrator's Shortcuts</i> tab. A user with this privilege can create or modify the Job-Task shortcuts that appear in the secondary <i>Operations</i> window of the <i>Taskmaster Window</i> (Page 49).
QA	Provides access to the <i>QA</i> tab. This tab allows an authorized user to set up Quality Assurance child jobs (Page 57).
Station Monitor	Gives an authorized user access to information in <i>Taskmaster's Station Monitor</i> (Chapter 5).
Run Task Dialog	Provides access to the Run Task item in the Database menu of the <i>Taskmaster Window</i> and to the features of the Run Task dialog (Chapter 4).
General Settings	Selecting General from the Settings menu of the <i>Taskmaster Window</i> retrieves the four tabs of the General Settings dialog (Chapter 3). These options give a user the right to review information and modify settings in one or more of these tabs. (All users can access the <i>Background</i> tab.)
Databases	Authorizes access to the <i>Databases</i> tab of the General Settings dialog and its Data Source specifications.
Advanced	Accesses the application specifications of the <i>Advanced</i> tab.
Logging	Accesses specifications of the <i>Log</i> tab that determine when and how the application is to generate Log files.
Communications	The <i>Communications</i> privileges allow a user to communicate electronically with members of the Datacap network—and to run tasks from remote workstations (Chapter 3).
Messaging and Chat	Grants a user access to the Open Chat Window and Send Message features of the Tools menu.
Remote Administration	Permits the user to work with the three “remote station” items of the Tools menu: Start Task , Stop Processing and Shut Down .

User Definitions—Administrative Privileges (continued)

Privilege	Description
Client(s)	These additional privileges allow the user to employ his or her Taskmaster Client in two special ways.
Report Viewer	Lets the client generate task reports from the <i>Report Viewer</i> (Chapter 7 of the <i>Administrator's Guide</i>).
<i>Taskmaster Web</i>	Authorizes the client to access and work within an application's <i>Taskmaster Web</i> site. (The <i>Guide to Taskmaster Web</i> examines all facets of operations in the <i>Taskmaster Web</i> environment.)



Taskmaster Administrator—Users Tab
Job-Task Permissions

User Qualifications: Job-Task Permissions

The second component of a User Definition gives the user “permission” to initiate and run the Job/Task Combinations of an application’s workflow(s).

Remember: A Job/Task Combination links a specific task to a specific job, and is *Taskmaster’s* fundamental processing entity. The *Workflow* tab of the application’s *Taskmaster Administrator* highlights these essential elements of a workflow’s hierarchy (Page 6).

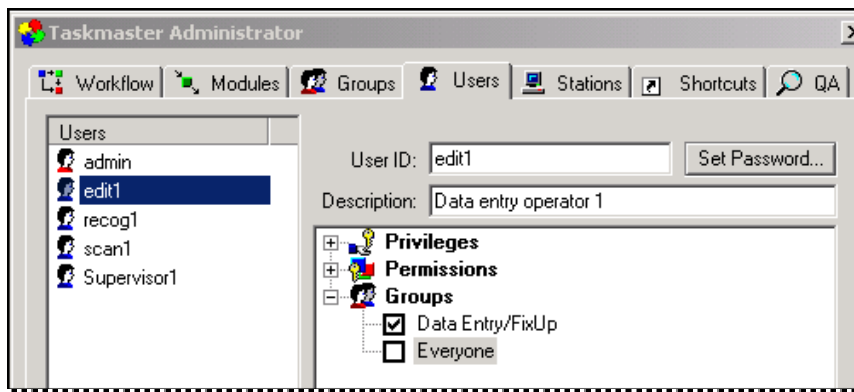
Like its list of Administrative **privileges**, the *Users* tab’s list of Job-Task **permissions** is hierarchical: if you click on the + icon next to the *Permissions* title at the top of the list, *Taskmaster* will identify the application’s jobs, and provide you with an option

(illustrated on the previous page). Select *All* if this user is an Administrator or Supervisor whom you are authorizing to run *all tasks in all jobs*.

As you can see, however, the other items are accompanied by the + icon. This icon leads you to Level 2, where the tasks assigned to each job appear—each with a check box.

To give a user permission to run a particular task, click on the check box next to that task. *Taskmaster* Security procedures **do not allow** a user to initiate or operate a task until you have granted him or her the necessary permission.

However, an application does not have to rely solely on the *Users* tab for Job-Task permissions. Instead, each user is part of at least one User Group and automatically inherits the permissions assigned to the Group.



User Qualifications: User Group Affiliations

The third component of a User Definition is the user’s affiliation with a User Group.

This is an *optional* attribute of a User Definition. In example above:

- There are two User Groups: *Data Entry/FixUp*, and *Everyone*.
- The Data Entry operators pick up their Job-Task permissions from the Data Entry/FixUp group.

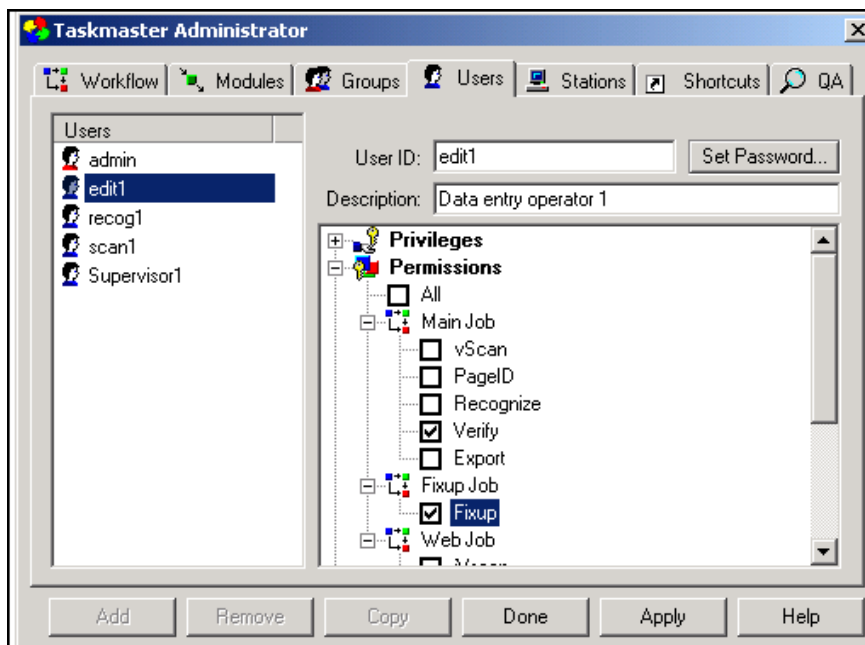
The user’s **Groups** assignment forges a strong link between *all* members of the group and the Job/Task Combinations assigned to it.

- ✓ *Taskmaster 6.5* allows you to assign Administrative Privileges to a User Group. For a full explanation of the *Groups* tab and User Group definitions, see Page 37.

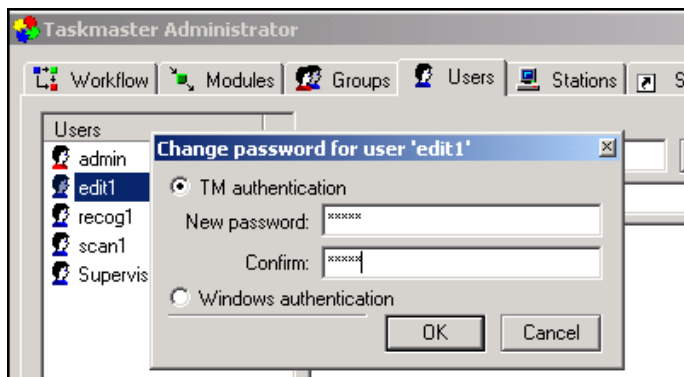
How to Define a User: Step-by-Step

To put together a new User Definition, take these steps:

Step	Action
1.	Select Users from the <i>Taskmaster Window's Settings</i> menu: the <i>Users</i> tab will appear on your screen.
2.	Press the Add button to clear the tab's interactive fields.
3.	Enter a unique User ID .
4.	Enter a brief Description of this user.

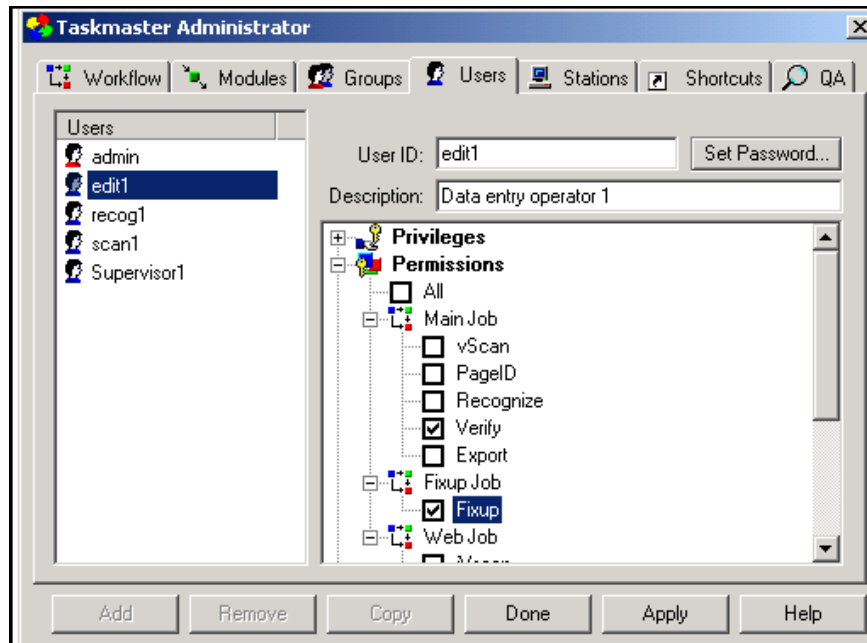


5. Click on the Set Password button to access the *Change Password* dialog. Enter and confirm a **New Password**.
6. Select an **Authentication** option.



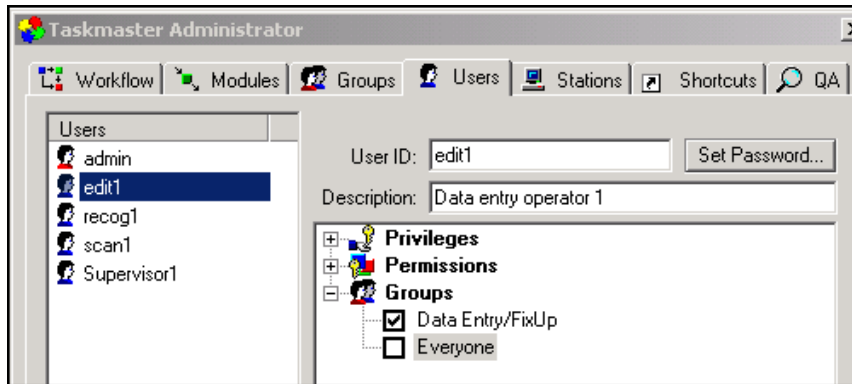
To Define a User (continued)

Step	Action
7.	Close the <i>Change Password</i> dialog.
8.	From the <i>Privileges</i> options, specify this user's administrative responsibilities, if any.
9.	Scroll to the <i>Permissions</i> area. Select those Job/Task Combinations for which this user will be responsible.



To Define a User (continued)

Step	Action
10.	Scroll to the <i>Groups</i> area. If you are assigning this user to a User Group other than <i>Everyone</i> , select the applicable Group ID(s). Remember: You can define a User Group later on, then update this User Definition with a new Group assignment.



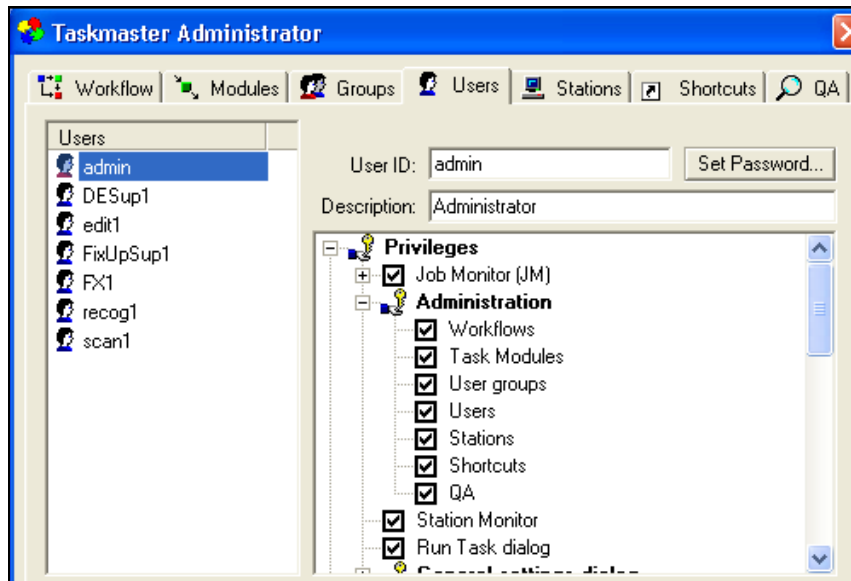
11. Review your settings.
12. Press the Apply button at the bottom of the tab.
13. Press the Done button to close the *Taskmaster Administrator*.

Groups Tab

A User Group identifies individuals with the same or similar responsibilities, and assigns all members the same Job-Task permissions and, if applicable, identical administrative privileges. As a result, a particular User Definition does *not* have to include permissions and privileges: the user can “inherit” those of a group. A user that belongs to multiple groups inherits the privileges and permissions of all groups.

User Group Qualifications: Privileges and Permissions

In the example below, the *Users* tab (Page 25) lists six users, in addition to the all-powerful *admin* user. The *edit1* and *FX1* operators are responsible for interactive Data Entry and FixUp procedures. *DESup1* and *FixUpSup1* supervise these procedures, and their operators.



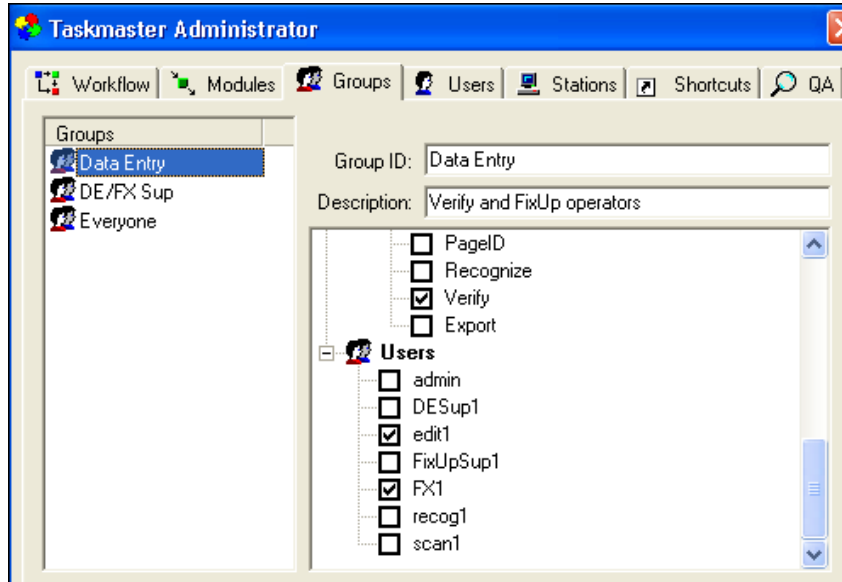
Taskmaster Administrator – Users tab

In the *Groups* tab (illustrated on the next page), there are three User Groups:

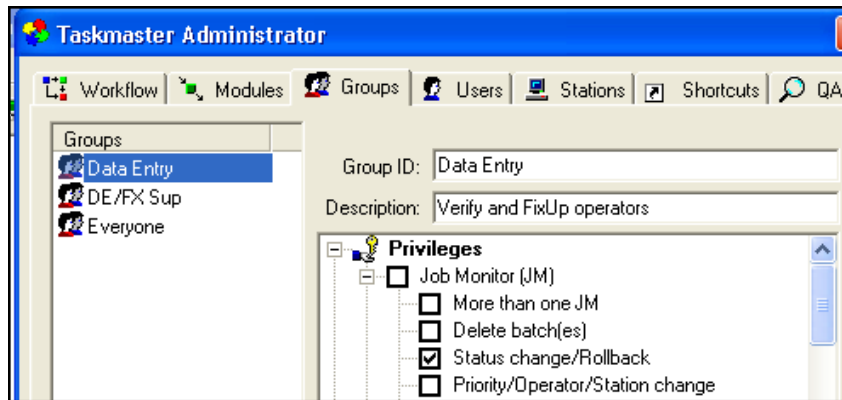
- ◆ The *Data Entry* group includes the *edit1* and *FX1* users. The group’s members have one only privilege: they can use the **Job Monitor** to “roll back” batches to an earlier task and change the processing status of a batch. The *edit1* and *FX1* operators have permission to run the application’s *FixUp Job.FixUp* and *Main Job.Verify Job/Task Combinations*.
- ◆ The *DE/FX Sup* group consists of the supervisory users – *DESup1* and *FixUpSup1*. They have more **Job Monitor** privileges than the *Data Entry* group, and can use the application’s **Station Monitor** and **Run Task** dialog (see the illustrations on Page 39). However, the group’s privileges do not include access to the tabs of the **Taskmaster Administrator**.

User Group Qualifications: Privileges and Permissions

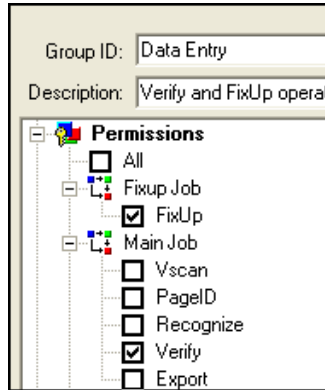
- ◆ At the bottom of the **Groups** list, *Everyone* is a catch-all. All users belong to this group, but the group does not have administrative privileges or Job-Task permissions. You can, however, remove a user from the *Everyone* group, and you can provide the group with privileges and permissions.



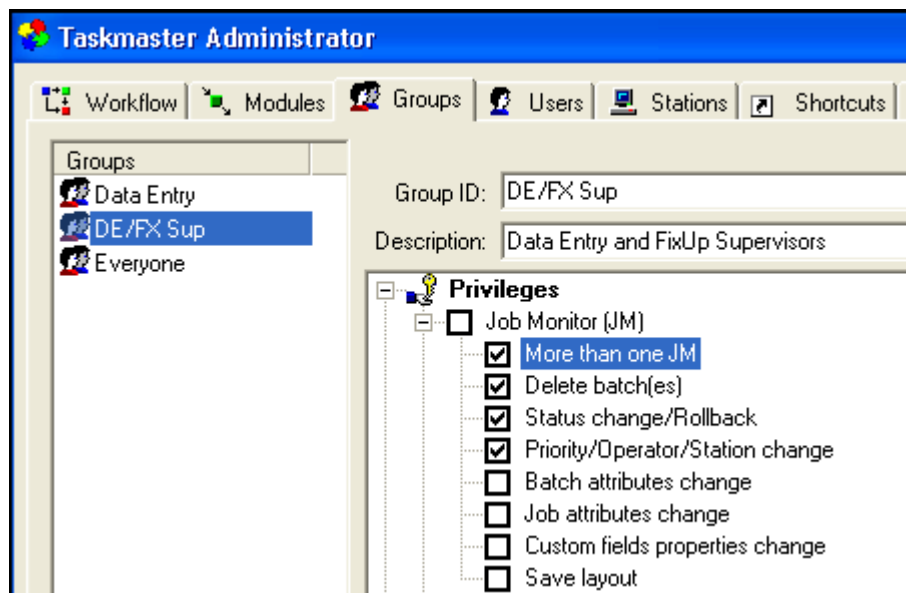
Taskmaster Administrator – Groups tab
Members of the Data Entry Group



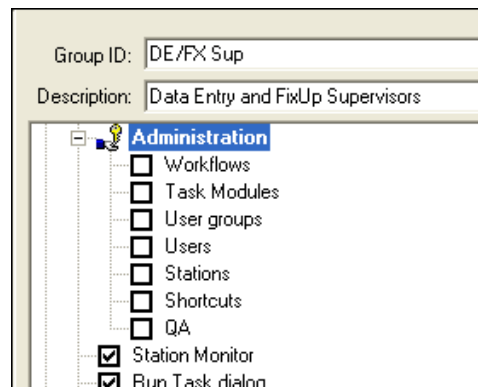
Data Entry Group – Privilege



Data Entry Group – Job-Task Permissions



DE/FX Sup Group – Job Monitor Privileges



DE/FX Sup Group – Job Monitor Privileges

Fields and Functions of the Groups Tab

The table below describes the *Groups* tab (illustrated on the previous page.)

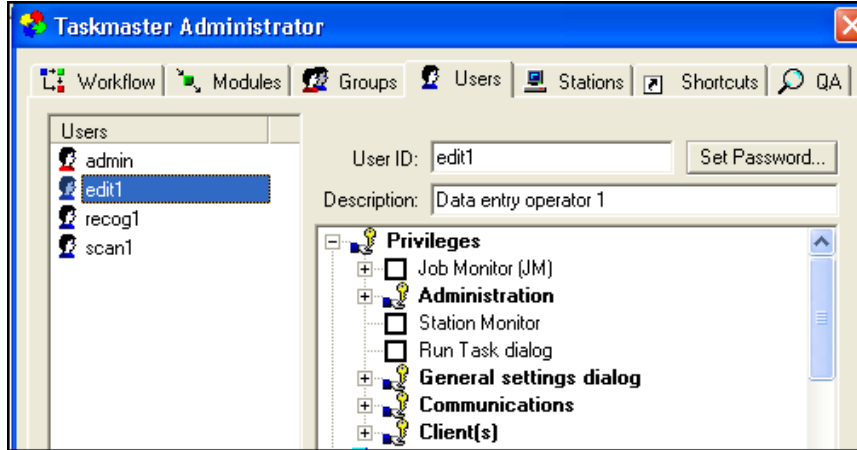
Field/Function	Description
Group List	<p>A list of identifying codes representing previously defined User Groups.</p> <p><i>Alert! Everyone</i> is a default User Group without Administrative Privileges and Job-Task Permissions. You can, however, assign privileges and permissions to the group, and these will be picked up by its users.</p> <p><i>Taskmaster</i> will automatically assign a new user to this group.</p>
Group ID	<p>A unique code you assign to identify a User Group.</p> <p>When you define a new User Group and press the Apply button at the bottom of the <i>Taskmaster Administrator</i>, <i>Taskmaster</i> automatically adds the Group ID to the Group List field.</p>
Description	<p>A brief description of the Group's nature and membership.</p>
Qualifications	<p>This dynamic field lists an application's jobs and tasks, and its users. Next to each item is a check box; activating the check box adds the item to the User Group's qualifications.</p> <p>If there are changes to an application's jobs, tasks and users, the Qualifications field immediately incorporates the results.</p>
Privileges	<p>Administrative privileges covering use the <i>Job Monitor</i> and other runtime dialogs, tabs of the <i>Taskmaster Administrator</i>, and special communications dialogs. Page 27 describes each privilege.</p>
Permissions	<p>This is a two-level list:</p> <p>Selecting <i>All</i> grants members of this User Group permission to carry out all tasks in all jobs.</p> <p>Alternatively, you can select one or more tasks in one or more jobs.</p> <p>Very important! The permissions you assign to a User Group do not appear as selections in the User Definitions of individual members.</p>
Users	<p>A list of User IDs representing the application's active users.</p> <p>Selecting a user automatically accords him or her the Administrative Privileges and Job-Task permissions you checked above.</p>

How to Define a User Group

There's a chicken-and-the-egg relationship between definitions of users and User Groups:

- A User Definition (Page 25) assigns the user to one or more User Groups.
- A User Group Definition includes previously defined users as members.

As a guideline, *we recommend* that you construct an application's User Definitions before you set up your User Groups.



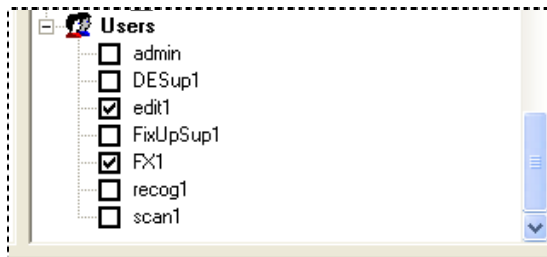
To define a User Group, take these steps:

Step	Action
1.	Select Groups from the <i>Taskmaster Window's</i> Settings menu.
2.	When the <i>Taskmaster Administrator's</i> Groups tab appears, press the Add button at the bottom of the tab to clear the interactive fields; this step will also "gray out" the Qualifications field on the right.
3.	Enter a unique Group ID .
4.	Add a brief Description of the User Group.
5.	Press the Apply button.
6.	Read <i>Taskmaster's</i> message about the updating procedures; click on the <i>Message Pad's</i> Ok button.
7.	Verify that <i>Taskmaster</i> has added the Group ID to the Groups List .

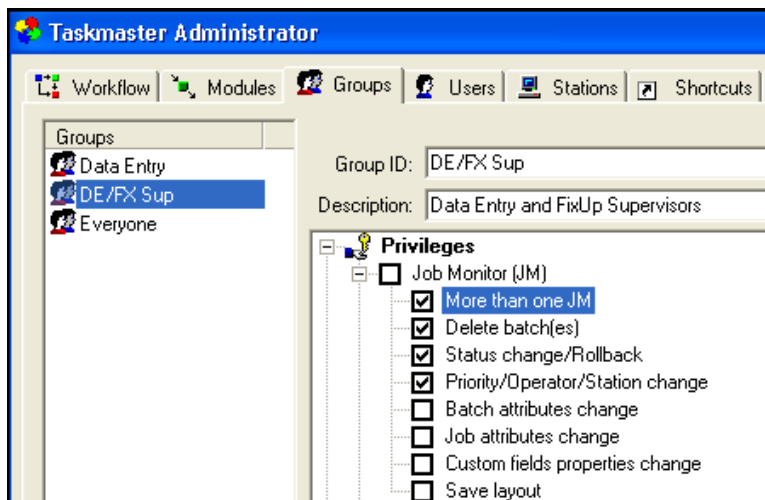
To Define a User Group (continued)

Step	Action
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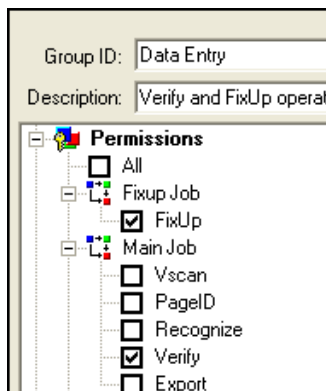
- At the bottom of the **Qualifications** list, check the users that will belong to the group.



- Back at the top, specify which Administrative Privileges, if any, you are according to members of the group.



- Use the **Permissions** list to assign Job-Task permissions to the group (and all its members!)



To Define a User Group (continued)

- | Step | Action |
|------|---|
| 11. | Review the new group's criteria – its members, privileges and Job-Task permissions. |
| 12. | Press the Apply button at the bottom of the <i>Taskmaster Administrator</i> . |
| 13. | Review the content of the following message and click on the OK button. |



14. Press the *Taskmaster Administrator's* Done button.

Stations Tab

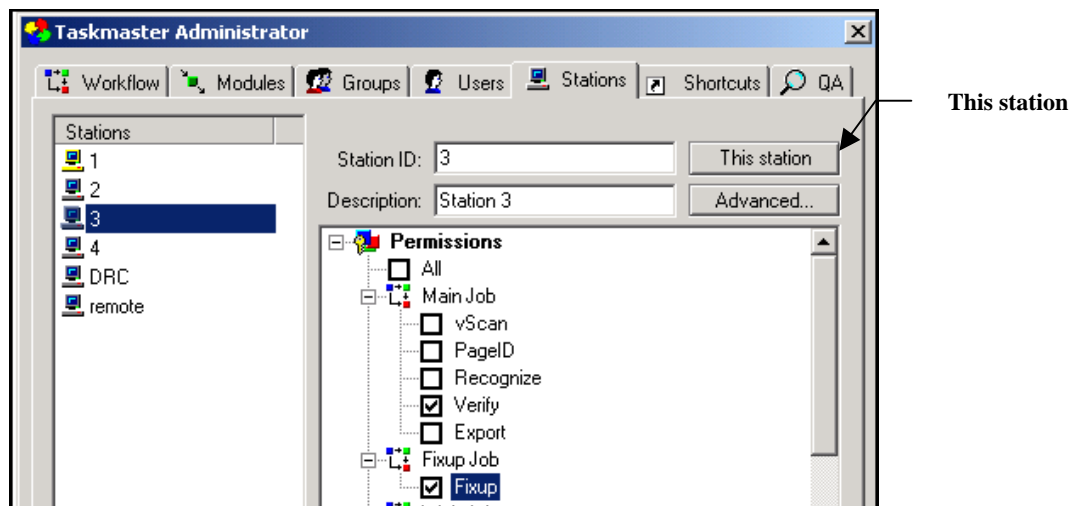
Settings in the *Stations* tab authorize the involvement of the individual computers from which users run tasks, or from which an Administrator defines, reviews and modifies an application's specifications. To access this tab, select **Stations** from the **Settings** menu.

- ✓ **Datacap Taskmaster** Installation process installs “client” software on each workstation (see the Taskmaster 7.5 Installation and Configuration Guide for details.) However, a workstation **cannot** use this software until the Administrator has provided it with a Station Definition authorizing its activities. In addition, an authorized user **cannot** access a *Taskmaster* application unless both the user and workstation have comparable authorization.

The table on the next page describes the settings of the *Stations* tab. As you review these descriptions, consider the following points:

Security parameters designate limits. If a User Definition (Page 25) grants an operator the right to process a particular set of Job/Task Combinations but the Station Definition's permissions allow only a few of those combinations, the user's scope is limited by the Station Definition. The same rule applies if a *User* Definition is more restrictive than a corresponding *Station* Definition.

Station Definitions are not transferable. An Administrator's User ID and Password allow the Administrator to construct Station Definitions from any workstation in the *Taskmaster* network. However, an individual Station Definition does not take effect until you have accessed it from the workstation to which it applies **and** have clicked on the *Stations* tab's **This station** button (see the illustration).



Taskmaster Administrator—Stations Tab

Is this a virtual station? If your **Datacap** configuration includes a *Taskmaster Web* Site, remote workstations can use the Web Site to access the application and carry out certain, very specific Job/Task operations. However, a station can be part of the

Taskmaster Web network only if you set it up as a “virtual” station. Page 46 briefly introduces virtual workstations; the *Guide to Taskmaster Web* contains complete explanations.

Fields and Functions of the Stations Tab

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

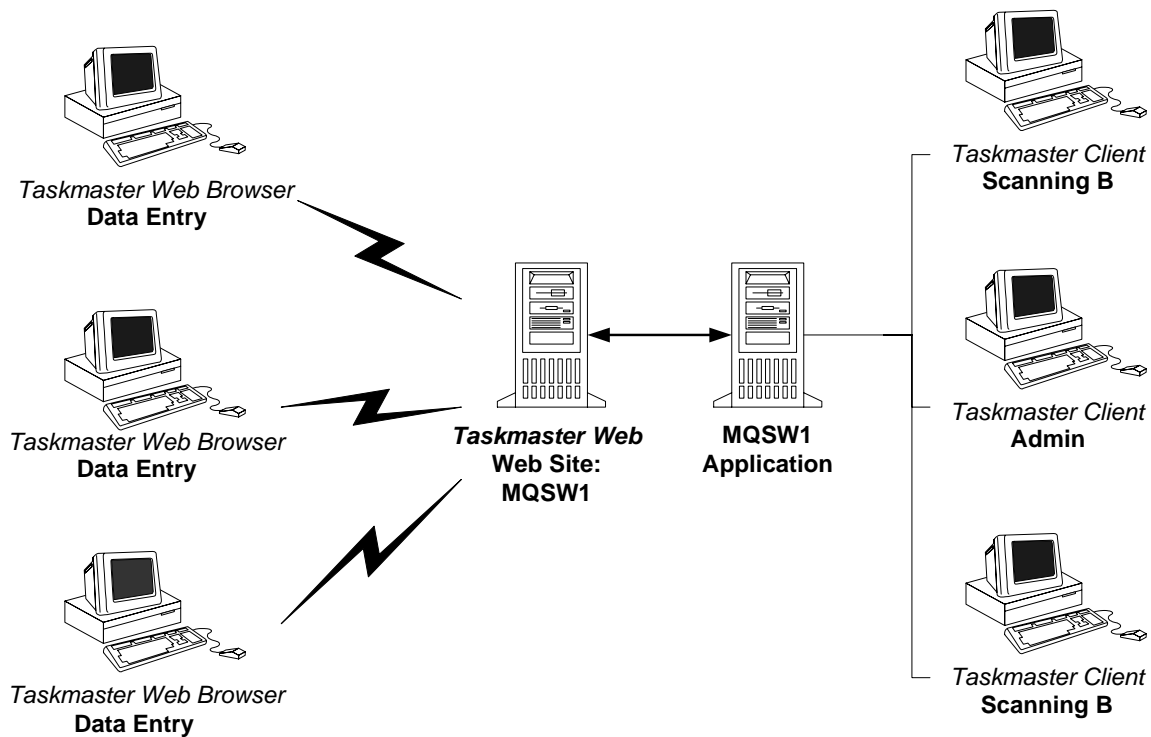
Field/Function	Description
Station List	A list of Station IDs that represent active workstations. When you highlight a Station ID in this list, the <i>Stations</i> tab displays the properties of that Station Definition.
Station ID	A unique code you assign to the Station Definition. Activating the This Station check box automatically assigns this Security code to this computer. You can, however, assign multiple Station Definitions to one computer.
This Station button	Assigns this Station Definition to the computer on which you are working.
Advanced button	Accesses the <i>Virtual Stations</i> dialog. Settings in this dialog apply the Workstation Definition to remote computers serving as <i>Taskmaster Web</i> clients (Page 46).
Description	A brief description of the workstation and its role. Although this is not a required entry, a description helps clarify the use of the workstation.
Permissions	The set of Job/Task Combinations authorized by this Station Definition. When you assign a Station Definition to a particular computer, the computer can carry out <i>only</i> the jobs and tasks you’ve selected.
Add button	Clears the fields of the <i>Stations</i> tab so you prepare a new Station Definition (see the next page).
Remove button	Deletes the Station Definition associated with a Station ID you’ve highlighted in the Station List .

Taskmaster Administrator – Stations tab (continued)

Field/Function	Description
Copy button	Retrieves the <i>Copy Stations</i> dialog. You can use this dialog to create a new Station Definition by copying the specifications of the Station Definition you've selected from the Station List .
Done button	Confirms new or modified Station Definition settings and closes the <i>Stations</i> tab.
Apply button	Adds the identity a new Station Definition to the application's database, and activates the Permissions list.
Help	Accesses <i>Taskmaster</i> Help.

Virtual Stations

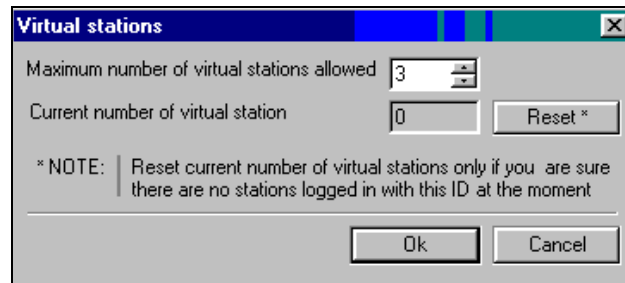
Suppose, for just a moment, that the Administrator of the fictional *MQSW1* application decides to add *Taskmaster Web* capabilities to his **Datacap** configuration – and three Data Entry operators who work from computers at home. The new configuration might look something like this:



- ✓ Although the *standard* Taskmaster Clients on the right have distinct Station ID's representing unique Station Definitions, the remote clients on the left are all covered by a single Station Definition (*Data Entry*).

The uniformity on the *Taskmaster Web* side results from:

- The completion of single Station Definition which gives the remote stations permission to carry out identical Job/Task Combinations;
- The Administrator's use of settings in the *Virtual Stations* dialog.



Virtual Stations Dialog

The definition of the *Data Entry* station allowed only one Job/Task Combination: TMWMain.TMWVerify.

The specifications in the illustration above limited the number of remote, *Data Entry* stations in the *Taskmaster Web* network to “3.”

When the Administrator applied the *Data Entry* definition to a specific, remote computer and clicked on the This Station button (see the next page), the computer assumed the *Data Entry* attributes – and *Taskmaster* automatically checked to be sure that the addition of this computer did not exceed the “Maximum number of virtual stations allowed.”

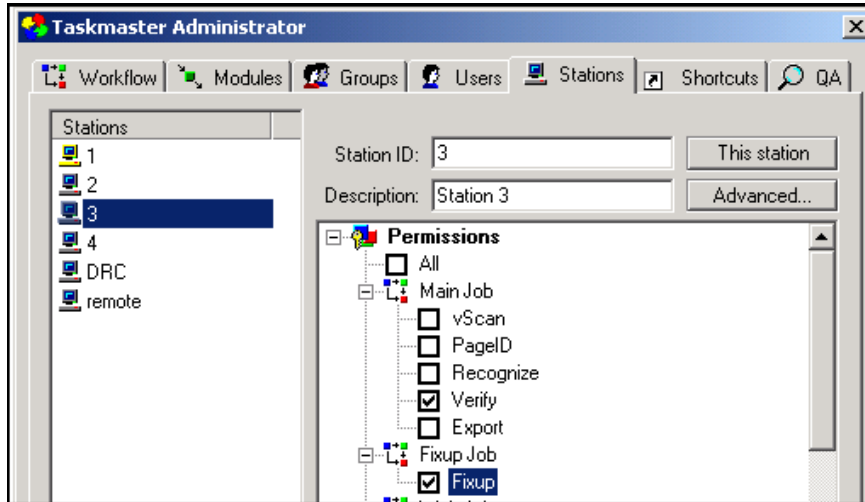
- **Don't forget:** The *Guide to Taskmaster Web* explores all aspects of *Taskmaster Web* sites and operations.

How to Construct a New Station Definition

To set up a new Station Definition and assign it to a specific workstation within your **Datacap** network, take these steps:

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

1. From your Administrator’s workstation, access the *Stations* tab of the *Taskmaster Administrator*.

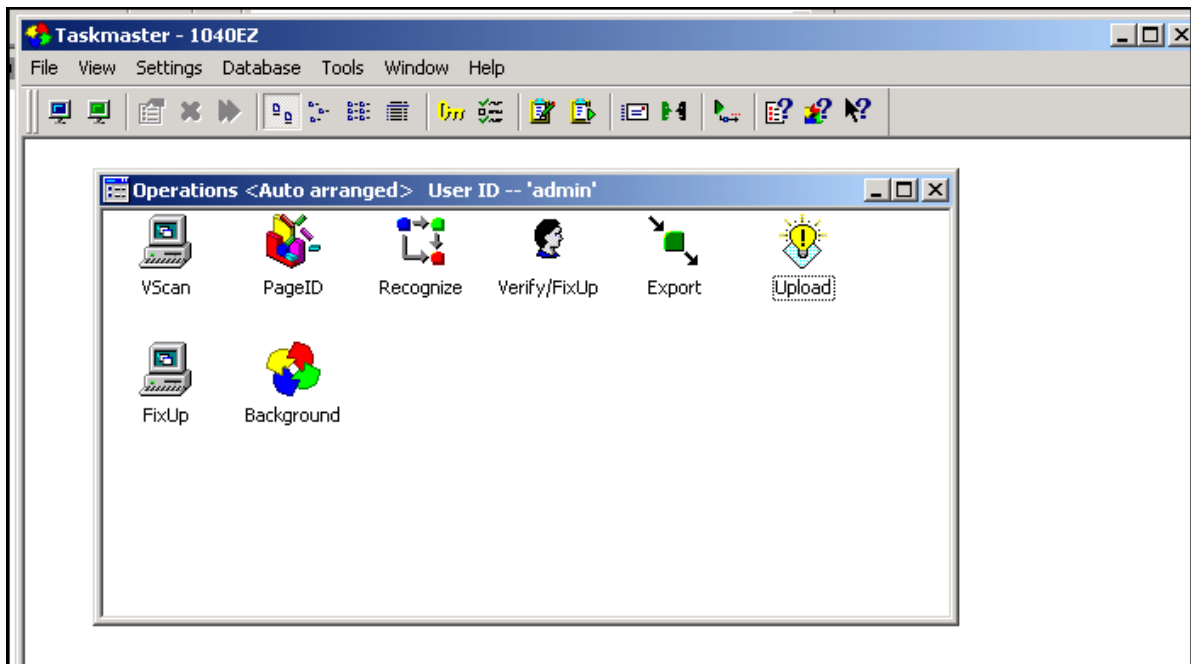


2. Press the Add button to clear the fields of the *Stations* tab.
3. Enter a unique **Station ID** code.
4. Provide a brief **Station Description**.
5. Press the Apply button.
6. Verify that *Taskmaster* has added the **Station ID** to the **Stations** list.
7. From the *Permissions* hierarchy, select those Job/Task Combinations this station may initiate.
8. If the Station Definition covers the computer you’re working from, press the **This Station** button.
9. Review your settings.
10. Press the Done button.

Shortcuts Tab

The *Shortcuts* tab defines the processing shortcuts that appear in the *Operations* window of the *Taskmaster Window* (Chapter 3). Usually, this window appears as soon as you sign on to the application (below).

A shortcut (and its corresponding icon) link an *authorized* user to a set of Job/Task Combinations for which he or she is responsible. The *1040EZ* application's Administrator is authorized to employ an array of shortcuts, something like this.



**Taskmaster Window – with Operations Window
"Admin" User's Shortcuts**

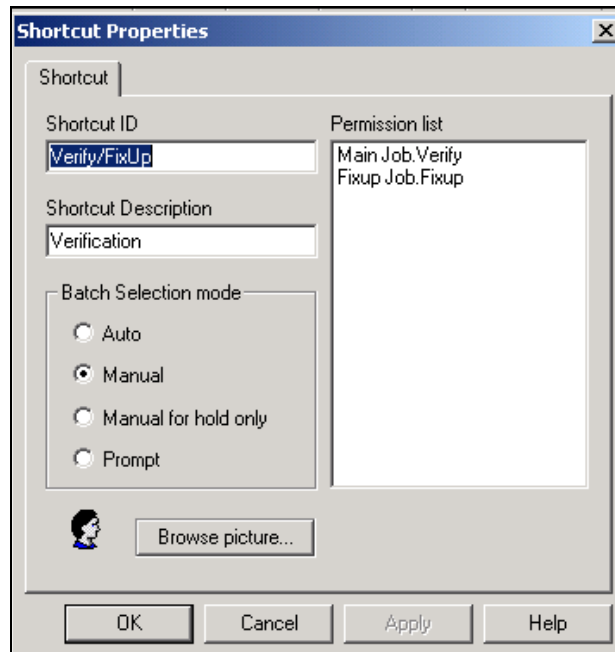
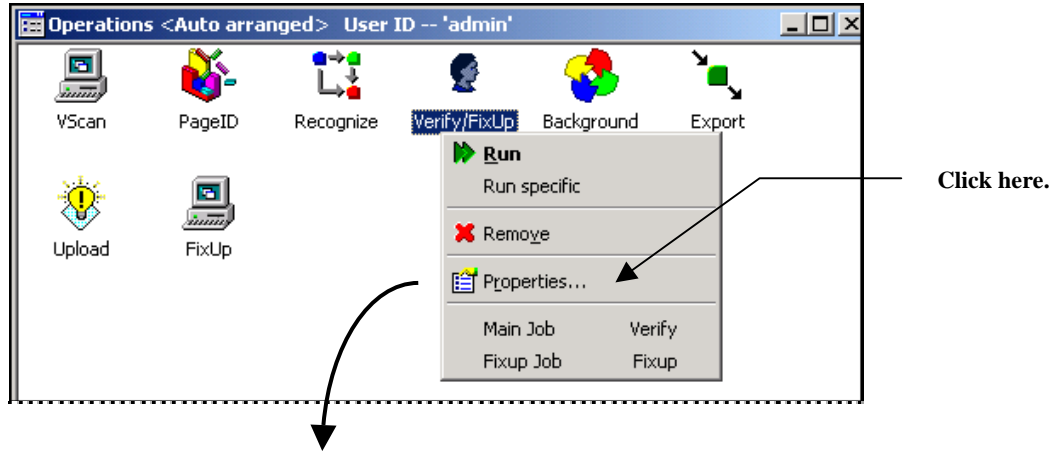
If you double-click on an icon with the *left* button of your mouse, *Taskmaster* initiates a sequence that begins the batch processing activity of jobs and tasks represented by the icon (Chapter 4).

If you click on the shortcut icon with the *right* button, the list illustrated on the next page appears first; if you then select **Properties**, *Taskmaster* retrieves the *Shortcut Properties* dialog and displays the shortcut's jobs and tasks.

How to Construct a New Station Definition

In this example, the **Verify/FixUp** shortcut connects an operator to a number of Job/Task Combinations in the **Permission List**. There are other properties...a unique **Shortcut ID**, a **Description** of the shortcut's scope, and the designation of a **Batch Selection Mode** to guide the shortcut's tasks as they look for the next batch to process.

- ✓ These properties are the specifications of a Shortcut Definition you prepare, using the fields and functions of the *Shortcuts* tab. These are described in the table on the next page. For more about the *Shortcut Properties* dialog, see Page 56.



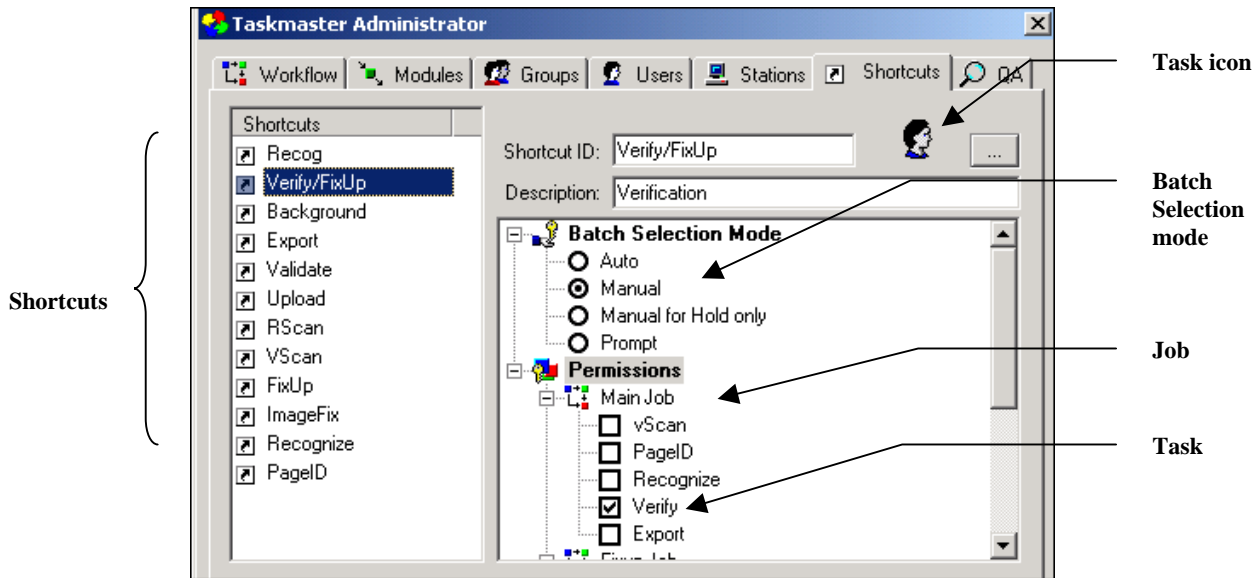
Shortcut Properties dialog

Fields and Functions of the Shortcuts Tab

The *Shortcuts* tab (illustrated on the next page) has these elements:

Field/Function	Description
Shortcut List	<p>A list of Shortcut IDs representing active Shortcut Definitions.</p> <p><i>Alert!</i> The set up of a new application <i>automatically</i> supplies you with default shortcuts and their corresponding icons. However, a default icon can appear in the application's <i>Operations</i> window only <i>after</i> you provide it with specific Job-Task permissions (Page 32).</p>
Shortcut ID	A unique code you assign to identify this Job-Task shortcut.
Description	A brief description of the shortcut's role and coverage.
Batch Selection Mode	These radio buttons represent alternative responses to an operator's selection of a shortcut icon. When defining a shortcut, you <i>must</i> choose a Batch Selection Mode (below).
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 shortcut icons representing <i>unattended</i> tasks...tasks that require little if any operator intervention.</p>
Manual	<p>Retrieves the <i>Batch Selection</i> dialog (Chapter 3).</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>
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 <i>Batch Selection</i> dialog, which lists batches in the queue with a <i>Hold</i> status. <i>Taskmaster cannot</i> automatically handle the remaining batches until the user has successfully dealt with these batches.</p>

Fields and Functions of the Shortcuts Tab



Taskmaster Administrator – *Shortcuts Tab*

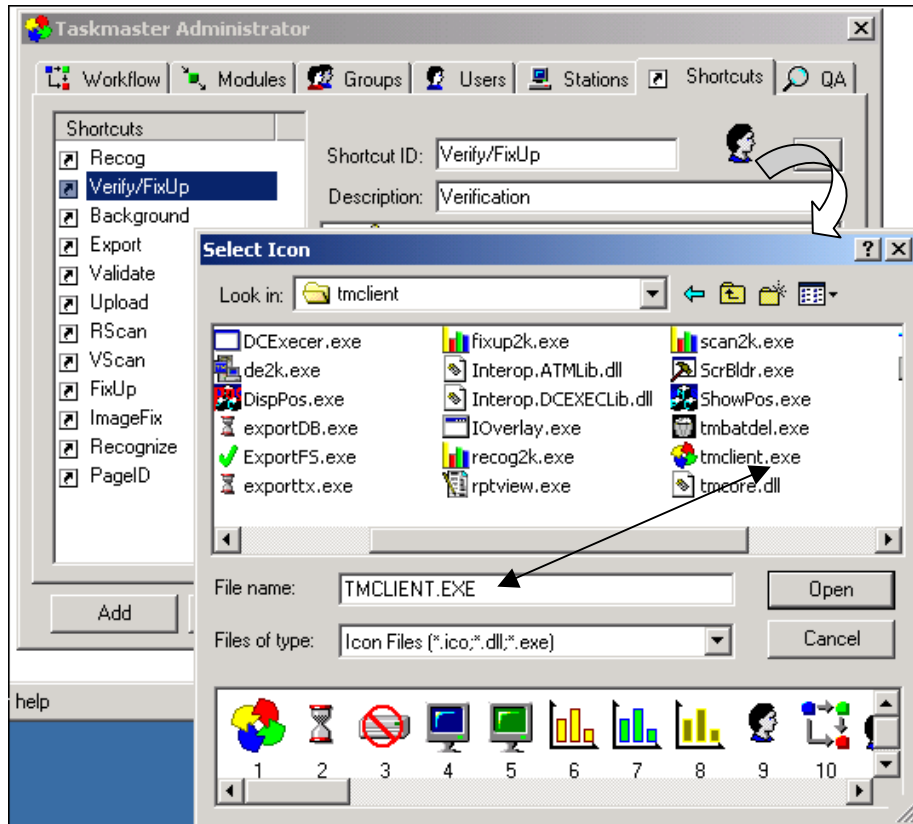
Shortcuts Tab (continued)

Field/Function	Description
Prompt	<p>Displays a modified version of the <i>Shortcut Properties</i> dialog each time the task selects a batch <i>automatically</i>.</p> <p>This allows an authorized user to change the Batch Selection Mode setting before the task processes the next batch, and can be a helpful testing device.</p>
Permissions	<p>A list of the application's jobs, and the tasks assigned to each job (Page 32).</p> <p>If you place a check in the check box next to a Task ID, <i>Taskmaster</i> adds the Job/Task Combination to the shortcut. This Job/Task Combination then appears in the Permission List of the <i>Shortcut Properties</i> dialog.</p>
Shortcut Icon	<p>The graphic of the shortcut icon you've highlighted in the Shortcuts List.</p> <p>The example above shows the default graphic that represents Verification and FixUp tasks.</p>

Shortcuts Tab (continued)

Field/Function	Description
Ellipsis button (...)	<p>Accesses the <i>Select Icon</i> dialog (illustrated on the next page).</p> <p>A variation of the standard Windows <i>Open File</i> dialog, the <i>Select Icon</i> dialog has an additional field, and behaves a little differently.</p> <p>An icon is the shortcut's interactive connection to a user – an operator, Supervisor or Administrator who is initiating a task. When you define a new shortcut (Page 54), clicking on the Ellipsis button retrieves the <i>Select Icon</i> dialog. After a moment, the <i>Select Icon</i> dialog fills its Icons field with more than forty cartoons it extracts from the tmclient.exe file.</p> <p><i>To add an icon to a shortcut (or change an icon):</i></p> <ul style="list-style-type: none"> • Be sure that tmclient.exe is specified in the File Name field. • Select a picture from the Icons field of the <i>Select Icon</i> dialog. • Click on the Open button.
Add button	Clears the fields of the <i>Shortcuts</i> tab so you can add a new Shortcut Definition.
Remove button	Deletes the Shortcut Definition of a shortcut you've highlighted in the Shortcuts List .
Copy button	<p>Retrieves the <i>Copy Shortcuts</i> dialog.</p> <p>You can use this dialog to create a new Shortcut Definition by copying the specifications of the shortcut you've selected from the Shortcuts List (Page 50).</p> <p>Alert! For most applications, the shortcuts in the <i>Operations</i> window cover specific Job/Task Combinations and do not share properties. As a result, the Copy function is useful only during the installation and testing of a new application.</p>
Done button	Confirms new or modified Shortcut Definition settings and closes the <i>Shortcuts</i> tab.
Apply button	Adds properties to a new Shortcut Definition (Page 54).
Help button	Accesses <i>Taskmaster Help</i> .

How to Define a New Job-Task Shortcut



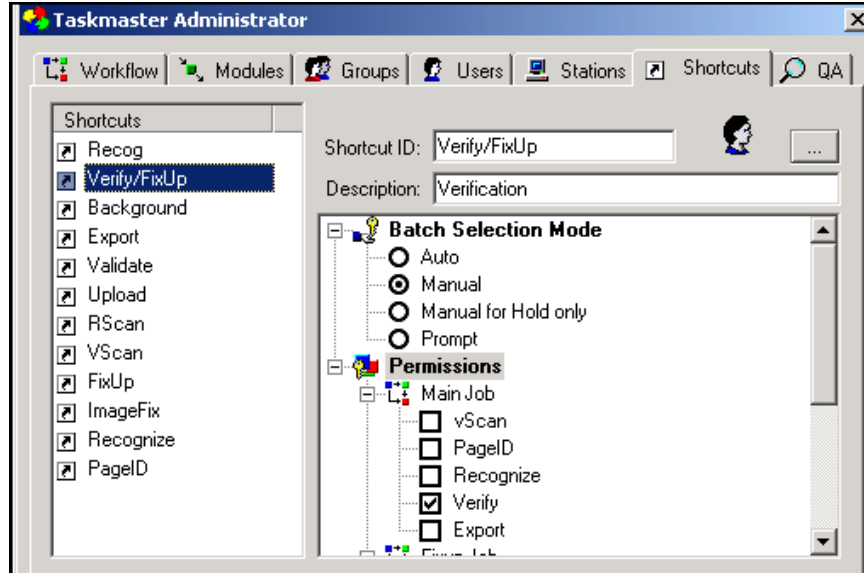
How to Define a New Job-Task Shortcut

To set up a new shortcut linking users with one or more Job/Task Combinations, take the steps below.

Step	Action
1.	Select Shortcuts from the <i>Taskmaster Window's Settings</i> menu: the <i>Shortcuts</i> tab of the <i>Taskmaster Administrator</i> will appear on your screen.
2.	Press the Add button to clear the tab's fields.
3.	Enter a unique Shortcut ID .
4.	Add a brief Description of the shortcut and its scope.
5.	Press the Apply button.
6.	Confirm that <i>Taskmaster</i> has added the new Shortcut ID to the Shortcuts List and has activated the Batch Selection Mode and Permissions options.

To Define a Job-Task shortcut (continued)

- | Step | Action |
|------|--|
| 7. | Select a Batch Selection Mode . <i>Remember:</i> This mode will be in force every time a user double-clicks on the shortcut's icon. |

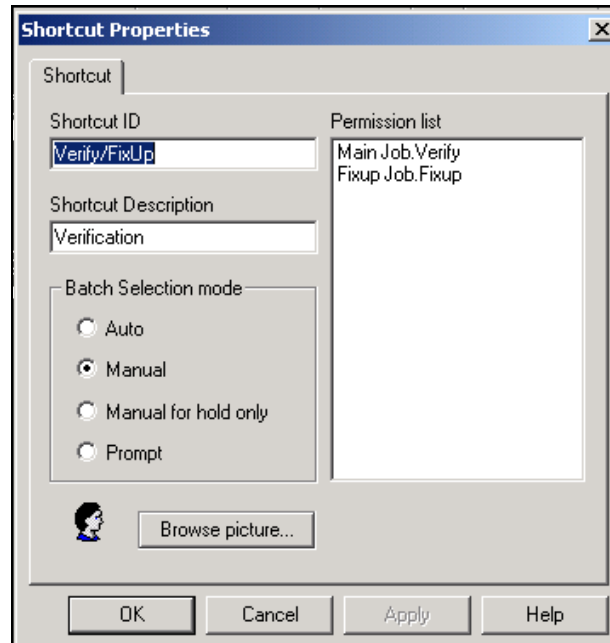


8. From the **Permissions** list, select the shortcut's Job/Task Combinations.
9. Click on the Ellipsis button to access the *Select Icons* dialog. Select a graphic from the **tm2kcl.exe** inventory and click on the OK button.
10. Press the Apply button at the bottom of the *Shortcuts* tab, then the Done button to return to the *Taskmaster Window*.
11. Open the *Operations* window to be sure the new shortcut icon is in place. **Alert!** In a crowded window, the new icon may “hide” behind another icon. If you do not see it immediately, use your cursor to nudge the others to the side.
12. Access the *Shortcut Properties* dialog (Page 56) to confirm the shortcut's attributes.

☛ **Very important!** Application Security intentionally restricts access to a workflow's jobs and tasks. Double-clicking on a shortcut icon in the *Operations* window will have no effect *whatsoever* unless the user, station and shortcut *all* have authorization to run the icon's Job/Task Combinations.

Shortcut Properties

Once a shortcut has been defined and its icon has a place in the *Operations* window, right-clicking on the icon and selecting *Properties* will present you with the *Shortcut Properties* dialog. This dialog is a source of both information and action, and is available *only* to users to whom you have granted a *Shortcuts* privilege (Page 27).



Shortcut Properties Dialog

The data and settings of this dialog duplicate the specifications of the *Shortcuts* tab for this shortcut. However, you can modify any setting *except* a Job-Task permission from the *Shortcut Properties* dialog; the changes will appear in the *Shortcuts* tab as well.

Clicking on the Browse button brings you immediately to the *Select Icon* dialog, where you can assign a different graphic to the shortcut.

QA Tab

A **Quality Assurance (QA)** job is a *child* job with a very special focus: it systematically audits the performance of a *parent* job’s task and of that task’s operators.

Instead of a set of Job Routing conditions and procedures, however, the *parent* job uses settings you provide in the *Taskmaster Administrator’s QA* tab – and in its Security tabs - to define and implement the branching mechanics.

- ✓ The procedures for defining Quality Assurance jobs and tasks are identical to those for standard jobs and tasks. However, a QA job cannot process batches until you take certain specific steps. These steps involve settings in the *QA* tab, the *Groups* tab, and the *Workflow* tab.

These steps also involve a corresponding relationship between two sets of users: the *auditors* of a task’s performance...and those who are *audited*.

To construct Quality Assurance procedures to audit *1040EZ’s* images **and** Scan task operator, as an example, will requires these new definitions:

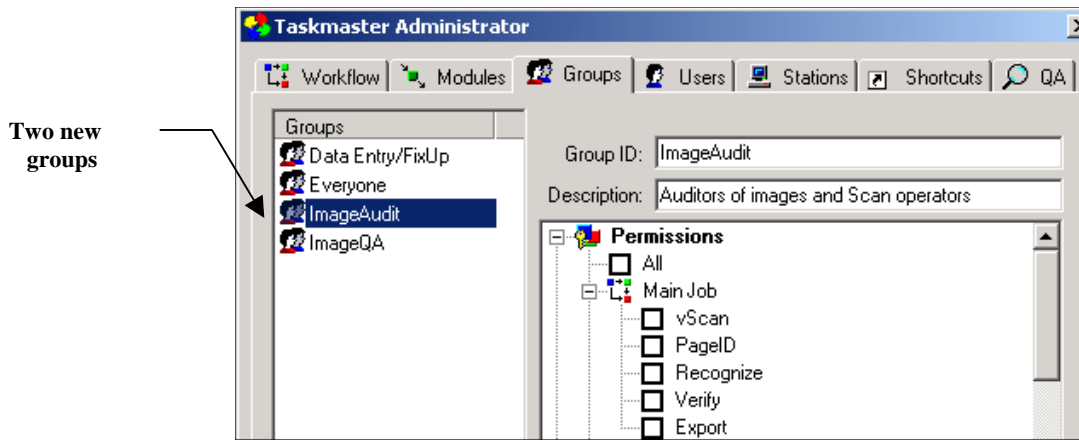
Definition	Tab	Description
Audit Group	Group	Includes the user or users who will be audited by Quality Assurance job.
Auditing Group	Group	Includes the user or users who will conduct the audit.
QA Job	Workflow	The <i>child</i> job responsible for audit.
QA Task	Workflow	The task that performs the audit.
Auditing User(s)	Users	Individuals who will audit target Job/Task Combinations and users. These users must have permission to carry out the QA Job/Task Combination (above).
Auditing Station	Station	The workstation authorized to perform audits.
QA Procedure	QA	Specifications that determine <i>who</i> will audit <i>what</i> – and how often.

Group Definitions

In this case, the Quality Assurance setup needs two new groups: one with those who will be audited, the other with those will audit.

The illustration on the next page shows the two new groups. At this early stage, you can’t assign a new user to either group - or connect a group to a QA Job/Task combination – simply because they haven’t yet been defined!

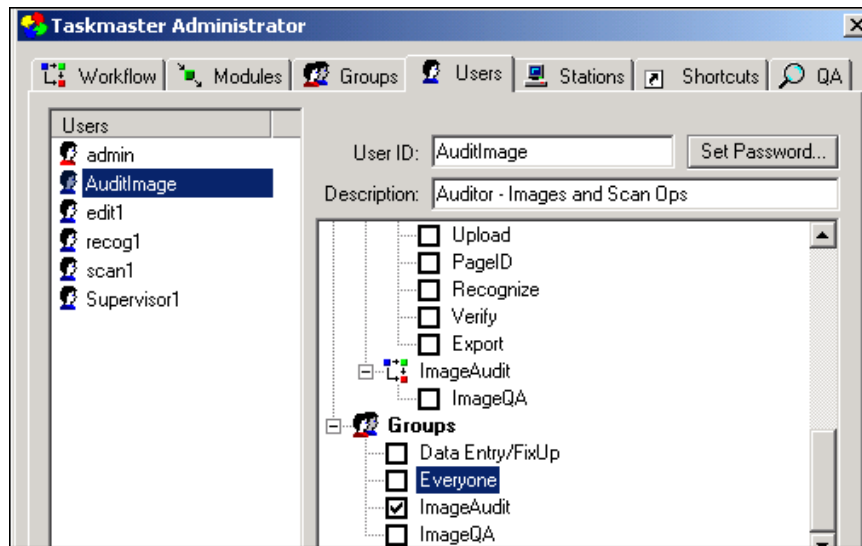
Shortcut Properties



Taskmaster Administrator – Groups tab

User Definitions

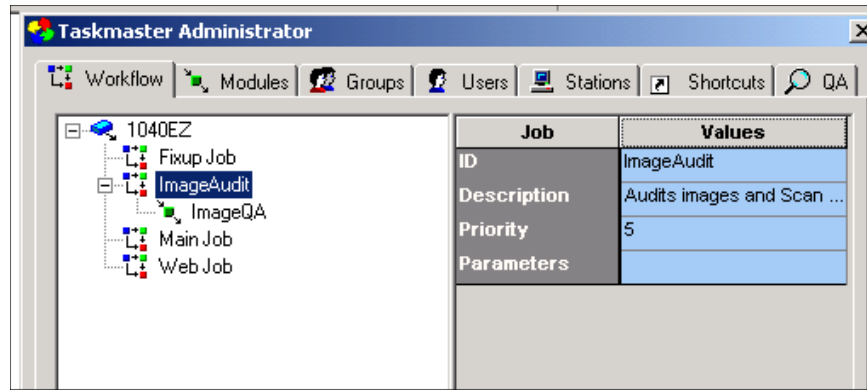
Here, the Administrator set up an *AuditImage* user to be responsible for the QA activities, and assigned the *AuditImage* user to the *ImageAudit* group (above).



Job/Task Definitions

This stage defined the QA *child* job and its task (illustrated on the next page.) Be sure to include all steps in the Job Definition and Task Definition process (Page 6) – including, if necessary, the definition of a new Task Module (Page 20).

As soon as this essential step is complete, the *1040EZ* Administrator can return to the *Group* and *Users* tabs – and assign the applicable Job-Task Permissions.



Taskmaster Administrator – Workflow tab

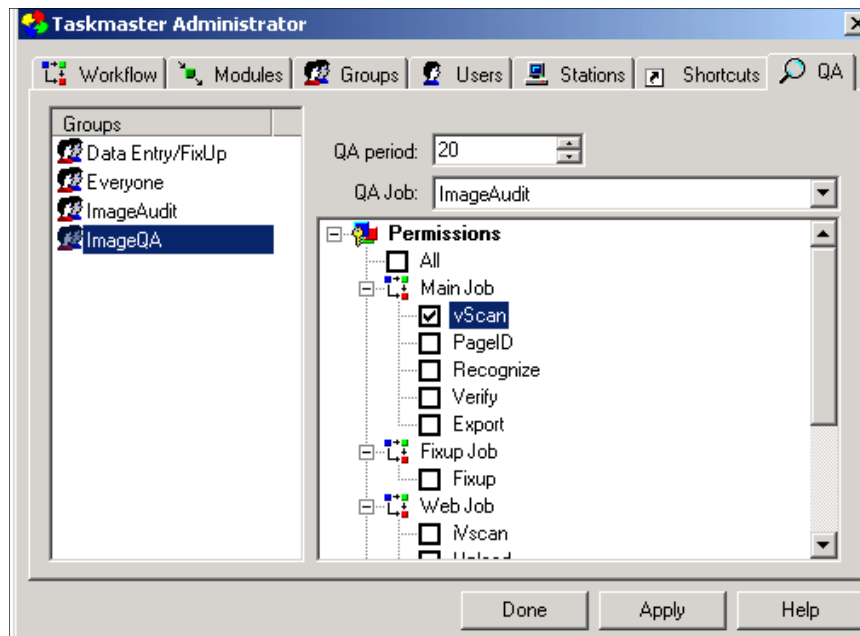
Station and Shortcut Definitions

After you've defined the QA Job/Task Combination, check to be sure the applicable station or stations have permission to perform QA procedures (Page 44).

And don't forget to add a QA shortcut icon to the *Operations* window (Page 49)!

Fields and Functions of the QA Tab

The QA tab has four fields and *only three* action buttons



Taskmaster Administrator – QA Tab

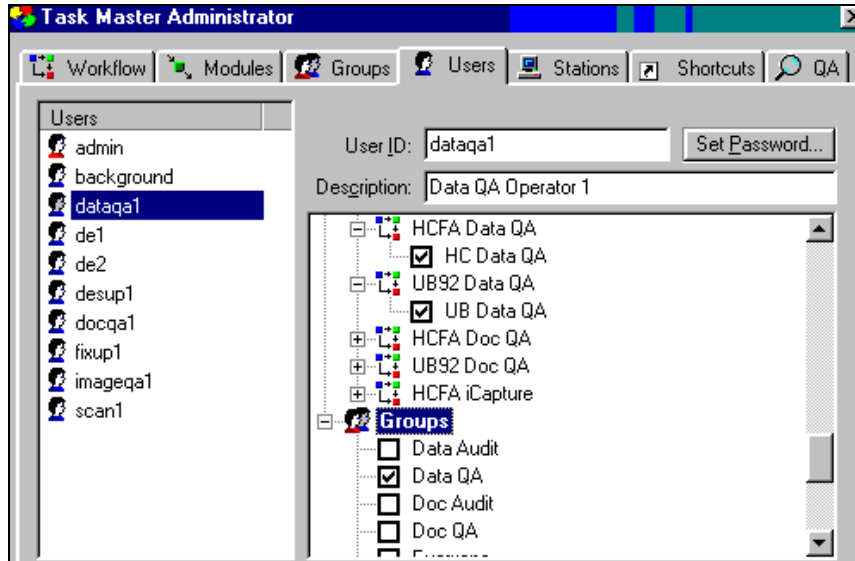
Field/Function	Description
Groups List	<p>A list of <i>all</i> User Groups you've defined for the application (Page 37).</p> <p>When you select a group from this list, its members will automatically be subject to audit...</p> <ul style="list-style-type: none"> • By the tasks of a Quality Assurance <i>child</i> job you select from the QA Job drop-down list... • When they carry out Job/Task Combinations you select from the Job/Tasks field... • Regularly, at a batch selection rate you specify in the QA Period field.
Permissions	<p>A list of all Job/Task Combinations in all workflows.</p> <p>You'll use this list to designate those tasks that are to be audited by the Quality Assurance <i>child</i> job you select in the QA Job field.</p> <p>Alert! You can only select a Job/Task Combination which you have <i>previously</i> assigned to the User Group you've highlighted in the Groups List.</p>
QA Job	<p>The title of the Quality Assurance <i>child</i> job responsible for:</p> <p>Auditing a User Group you've highlighted in the Groups List...</p> <p>When its members are carrying out a task you've highlighted in the Job/Task Assignment field.</p> <p>Alert! This field becomes active <i>after</i> you select the group to be audited from the Groups List, and at least one Job/Task Combination from the Permissions list.</p>
QA Period	<p>The numerical basis for the QA job's batch selection pattern.</p> <p>The "10" in the example means that the QA job will review every tenth batch.</p>
Done button	Closes Taskmaster Administrator .
Apply button	Saves the settings in the QA tab and, therefore, the relationship you've defined between the members of a User Group to be audited; the task(s) they perform; and the child job that carries out the audit.
Help button	Accesses Taskmaster Help .

How to Set Up a Quality Assurance Job

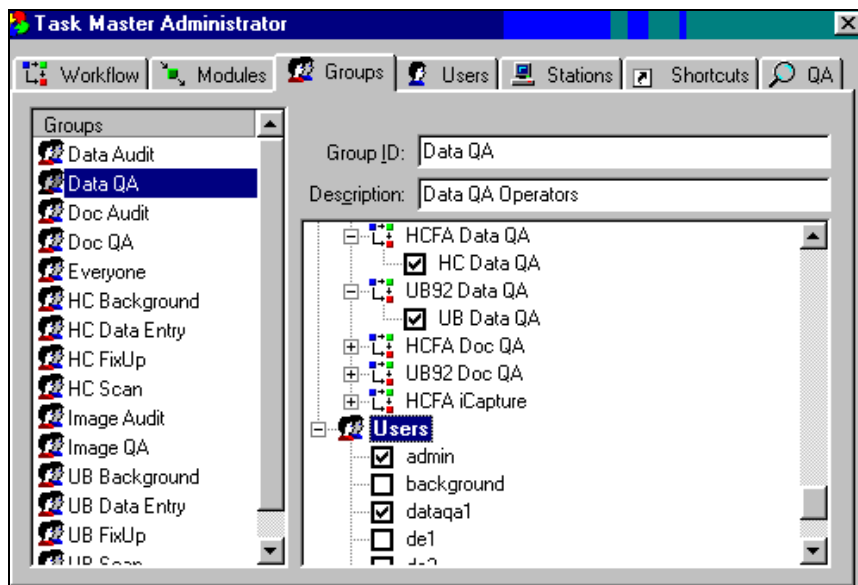
To implement a QA job, thus adding it to your workflow, take these steps:

Step	Action
1.	Review the design and components of a proposed QA job.
2.	Identify those users who are responsible for Job/Task Combinations to be audited by the QA job; these are the <i>audited</i> users.
3.	Define a QA User Group and assign the <i>audited</i> users to this group.
4.	Create User Definitions for the “auditors” who are responsible for the QA job’s tasks.
5.	Set up a second QA User Group and assign the auditors to this group.
6.	Access the <i>QA</i> tab of the <i>Taskmaster Administrator</i> .
7.	From the Groups List , select the QA User Group that is to be <i>audited</i> by the QA child job.
8.	In the Permissions field, click <i>first</i> on the job that contains the task to be audited, then on the task(s). This will activate the QA Period and QA Job fields.
9.	From the QA Job drop-down list, select the applicable Quality Assurance child job.
10.	Under QA Period , indicate a batch selection sequence—“5” to call for every fifth batch, “10” for every tenth batch, etc.
11.	Press the Apply button to add these specifications to your Admin database.

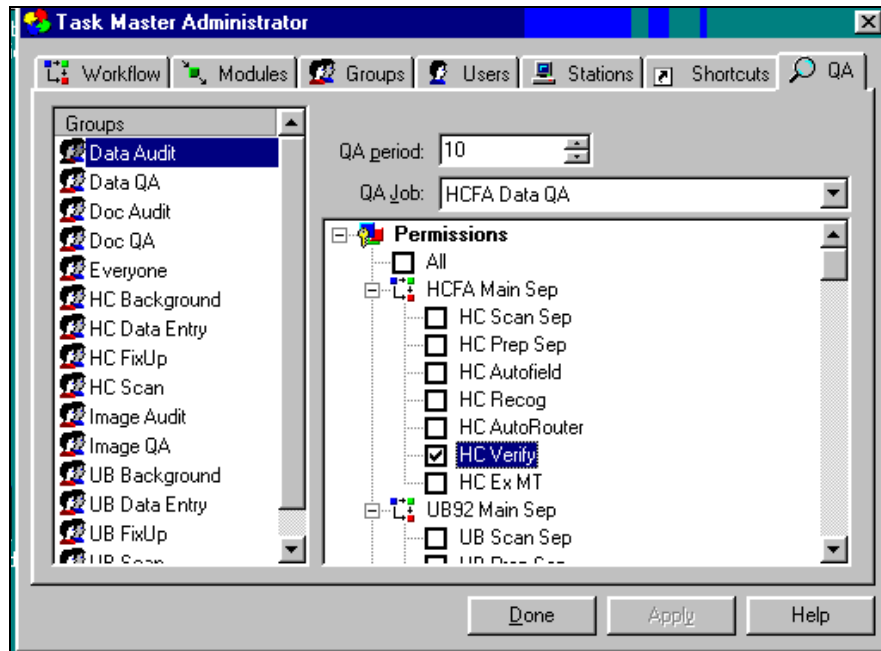
How to Set Up a Quality Assurance Job



Taskmaster Administrator – Users Tab
User Definition - dataqa1



Taskmaster Administrator – Groups Tab
User Group Definition – Data QA Group



Taskmaster Administrator – QA Tab
Auditing Parameters: HCFA Data QA Job