

Glossary

Windows & Dialogs Reference

This Glossary contains brief definitions of terms associated with *Taskmaster* windows and dialogs.

Admin Database

The *Taskmaster* database that contains definitions of jobs, tasks, users and workstations. *See also: Engine Database.*

Administrative Privileges

Attributes of a User Definition designating the ability of an individual, or individuals who are members of a User Group, to access administrative dialogs and data, and to carry out administrative functions. *See also: User Definition, Job/Task Permissions.*

Application

The principal organizing entity of a *Taskmaster* configuration. An application's Document Hierarchy identifies *structural* objects at four levels: **Batch**, **Document**, **Page** and **Field**. A Workflow Hierarchy organizes the application's *processing* entities at three levels: Workflow, Job and Task. *See also: Document Hierarchy, Workflow Hierarchy*

AutoDelete

A *Taskmaster* utility you can use to identify those batches that meet your selection criteria, then delete some or all of these batches from the application's **Batches** directory. *AutoDelete* updates tables of *Taskmaster*'s Engine database with the results of the deletion and retains evidence of the deleted batch, according to guidelines you prescribe.

Batch

The *Taskmaster* processing vehicle. The workflow's opening Scan task assembles a batch by scanning one or more pages, creating an Image (.tif) file for each page, then assigning these to the batch. The Scan task then adds a Page file (.xml) to the batch with details of its contents, and optionally, a Log (.log) file covering the Scan task's performance. Each succeeding task in the workflow processes the batches formed by the Scan task—and add files associated with that task to the batch. *See also: Workflow, Scan Task, Image File, Page, Page File, Data File, Log File.*

Batch Number

A unique code assigned by the Scan task to identify a batch. *Taskmaster* supports various Batch Numbering formats. A standard format is YYYYMMDD.nnn. Also known as the Batch ID. *See also: Scan Task.*

Batch Numbering

Alternative procedures to assign numbers to batches. **Datacap** provides *Taskmaster* Administrators with a set of Batch Numbering .dll files for 32-bit configurations: the Installation process includes these files in the File Server's **Datacap** directory: the files reside in the **batchnew** folder of the **dcshared** sub-directory. *See also: Batch Number.*

Batch Pilot

The development workshop used by *Taskmaster 6.2* (and later) to assemble, test and install forms such as **Data Entry** panels, and to define the Task Projects that are the foundations for individual *Taskmaster* tasks.

Branching

Routing a batch from the task of a *parent* job to a task of a *child* job. Branching occurs in response to a Job Rule that is an attribute of the parent job. The Job Rule specifies the conditions under which branching occurs. *See also: Child Job, Job Rule.*

Character

The representation of a single value in a field of a *source* page that contains data to be recognized, verified, validated and exported by the tasks of a workflow's job.

Child Job

A secondary job whose tasks carry out special operations. Under conditions spelled out in the definition of Recognition or Verification task in a *parent* job, the task diverts a "problem" batch to a *child* job for additional attention and possible repair – or sometimes for immediate export. *See also: Job Rule, Job, Workflow, Branching*

Client/Server Mode

A networking configuration that places a supervisory *Taskmaster* Server Service between the *Taskmaster* Clients and the File Server that holds an application's files. *Taskmaster* Server Service then manages the network as it continuously accesses products and applications on the File Server. The *client/server* mode is ideal for configurations employing numerous workstations. *See also: Serverless Mode.*

Confidence Level

A value between "0" and "9" stipulating a minimum degree of certainty on the part of the Recognition task that it has accurately recognized data in a particular field of a processed

page, or has accurately recognized the page itself. The Required Confidence Levels for a page and its fields are defined in the application's Document Hierarchy. "0" is the least stringent rating, while "9" means that Recognition will accept a value in the field only if it has interpreted the value with complete confidence. *See also: Recognition Task, FormSpec, Field.*

Connection String

Syntax that links components of a **Datacap Taskmaster** application to its principal databases: Admin (adm), Engine (eng), Rules (rule), Lookup (look) and Export (export).

Core Tasks

Tasks defined according to the specifications of Task Modules in four *Taskmaster* categories: Scan, Recognize, Verify and Export.

Database Roaming

A procedure that allows *Taskmaster* to access an alternative Engine or Admin database. Criteria for Database Roaming are set up in the *Databases* tab of the **Task Settings** dialog.

Data Source Name (DSN)

Specifications defining the link between a specific data *source*—usually a database such as an application's Engine or Admin database—and an **Open Database Connectivity** (ODBC) "driver." In Taskmaster 6.2, DSN's are replaced by Connection Strings.

Data File (.xml)

A file containing the Recognition task's interpretation of user-entered values in the fields and settings of a *source* page. After processing is complete, Recognition adds the Data file to the batch containing the page's Image file (.tif). If a succeeding task such as Verification alters an interpreted value, the task updates the Data file with the new value.

Data Source

The name and path of an application's Admin or Engine database and part of a Connection String that links a Taskmaster Client shortcut icon to the application. Data Source values are defined in the *Databases* tab of the **Task Settings** dialog; multiple Data Sources permit Database Roaming.

DocEdit

A **Datacap** product for the design and operation of custom **Data Entry** panels. *DocEdit's* Data Entry functions and panels display processed data requiring operator review and, if appropriate, modification during the Verification task. Applications after *Taskmaster 6.0* replace *DocEdit* panels with *Batch Pilot* panels, *See also: Batch Pilot, Panels.*

Document

A key organizational and processing unit, consisting of one or more user-completed pages of specific Page Types. All files representing a document's pages are included in a one batch; one batch, however, may contain files associated with multiple documents. Page files (.xml) generated by each task track results for each document in the batch and for each page in the document. **Document** objects occupy the second level of an application's Document Hierarchy. *See also: Batch, Document Hierarchy, Page, Page Type, Page File.*

Document Discrepancy

A procedure that specifies the *expected* number of documents in a batch; counts the documents in each batch after processing by each task; and reports any discrepancies.

Document Hierarchy

An edifice that defines the application with objects at four levels: **Batch, Document, Page** and **Fields**. A rule and its actions are bound to an object at a specific level of the Document Hierarchy.

It is a file as well (<application.xml>) and an essential property of an application's workflow and each Task Project.

Document Integrity

Settings of an application's Document Hierarchy that determine the required makeup of the documents in a batch in terms of the *number* and *type* of pages in a document. Once defined (usually as part of the Recognition task), Document Integrity is an application-wide standard.

Document Data

Standard identifying information about a document. This data appears in the D Line of a task's Page file. *See also: Page file, Document User Data.*

Document User Data

Additional, user-specified information about a document. This data appears in the DD line that follows each D line in a task's Page file. *See also: Page file, Document Data.*

Engine Database

The *Taskmaster* database containing processing results according to task, batch, document and page. *See also: Admin Database.*

Export File

A file (.txt) generated by an Export task.. The file consists of Export records containing verified data from the pages of a fully processed batch. The format and content of the Export record is determined by the field-level specifications of the Export Task Definition.

Export Task

The closing task in the Main job of the *default Taskmaster* workflow. In response to **Export** and **ExportClose** rules, the task extracts and formats verified data in the Data file of a *working* fingerprint and adds it to an Export database or ASCII text file.

Field

An object at the lowest level of an application's Document Hierarchy –and an element of a **Page** object one level above. All fields on a fingerprint contain *static* values such as titles; many contain *fluid* values such as IDs, dates or amounts entered by a form-filler.

File Server

The server on which **Datacap** files reside. Phase 1 of the Installation process copies these files from the Installation CD-ROM to the File Server.

FixUp Tasks

Tasks that review and correct the recognized data on the pages in a batch; diagnosis and remedy problems with document size and content; or re-scan seriously faulty images. A.

High Confidence Value

A value in a field of a scanned page which the Recognition task interprets with a degree of confidence that equals or exceeds the FormSpec's requirement. *See also: FormSpec.*

Image File

An electronic representation a scanned page. The Image file is a digital picture of the actual page, usually stored as a .tif file.

Job

A set of interrelated *Taskmaster* tasks that operate together to accomplish a specific goal. In most cases, the purpose of a job is to convert paper documents to scanned data. A job is component of a workflow. *See also: Workflow Hierarchy; Job; Task.*

Job Monitor

A secondary window used by Administrators and Supervisors to track the workflow's activity at the batch level. The *Job Monitor's* Batch Information Table lists batches

awaiting processing by specific Job/Task combinations; batches with a temporary *Hold* or *Waiting* status; and batches with have completed a job's processing cycle. *See also: Job/Task Combination.*

Job/Task Combination

The workflow's *fundamental processing unit*, forged by the assignment of a specific task to a specific job. *Taskmaster's* workflow prototype consists of four tasks assigned to a Main job: **Main.Scan**, **Main.Recognition**, **Main.Verify** and **Main.Export**.

Job-Task Permissions

Authorizations permitting individuals to carry out an application's Job/Task Combinations. An application's Security Program includes these authorizations in its User, User Group and Station Definitions. *See also: Job/Task Combination, Administrative Privileges.*

Log Files

Files that record events that occur when a task processes a batch.

Lookup Database

The database used by Validation rules of the RuleRunner and Verification task to confirm the *fluid* values in certain fields of a *working* fingerprint. *See also: Fluid Value, Working Fingerprint.*

Low Confidence Field

A field containing data that the Recognition task is uncertain about.

Low Confidence Page

A page that the Recognition task containing one or more Low Confidence fields. A Low Confidence field contains one or more characters that are below a recognition threshold the FormSpec has set for characters in that field.

Main Job

A workflow's primary job, usually consisting of tasks in at least four categories: Scanning, Recognition, Verification and Export. Sometimes, a task in the Main job branches to a task in the workflow of a child job. *See also: Child Job.*

OCR Field

An Optical Character Recognition field containing typed or computer-printed values.

OMR Field

An **Optical Mark Recognition** field containing one or more check boxes to be filled in by a user.

Operations Window

The secondary window within the *Taskmaster Window* containing shortcut icons that an authorized operator, Supervisor or Administrator uses to initiate task activity.

Operator

Individuals authorized by an application's Administrator to run one more workflow tasks. Scan, Verification and FixUp Tasks usually require operator participation. *Taskmaster* Security procedures require a unique User ID and Password for each operator.

Operator-filled Field

A field representing a sector of source field on a processed page. Values in Operator-field fields are often entered directly by Verification task operators and are always subject to operator review.

Page

An object on the third level of an application's Document Hierarchy. A **Page** object is an element of a **Document** object one level above, and contains **Field** objects one level below. In the early stages of a Main job, a page is represented by an Image file (.tif). Later, a page is represented by the Image file and a *source* page that includes a Data file (.xml) *See also: Document Hierarchy, Image File, Working Fingerprint, Data File, Main Job.*

Page Discrepancy

The difference between the *expected* number of pages in a batch, and the *actual* number. Standard tasks in all categories except Export will check for Page or Document Discrepancy *if* the applicable Task Definition provides the applicable parameters.

Page File

A file generated by a task as it processes a batch. The Page file (.xml) contains identifying codes and processing statistics about the batch, and about the documents and pages the batch contains. After a task has finished with a batch and compiled the Page file, the next task in the workflow refers to the Page file for processing benchmarks.

Page Group

A combination of pages representing different Page Types. The nature and number of Page Types in the Page Group forms the basis for a Document Integrity Rule that

determines the acceptable makeup of documents within a batch. *See also: Document Integrity, Page Type.*

Page Type

A designation representing a specific kind of page. A form consists of pages of one or more Page Types.

Page Data

A Page file's standard information about a processed page in a batch. The Page file's P line contains this data. *See also: Page File.*

Page User Data

A Page file's optional information about a processed page in a batch. Settings in the Scan Task Definition determine the content and format of the data, which appears in the PD line of the Page file.

Panel

See Data Entry Panels.

Paper Keyboard

For applications before *Taskmaster 6.2*, *Paper Keyboard* is responsible for the actual operation of a number of tasks, including Scanning, Recognition and Verification. *See also: Taskmaster and DocEdit.*

Privileges

see Administrative Privileges.

Quality Assurance Child Jobs

Optional, child jobs whose tasks regularly audit the results of a Main job's tasks.

Recognition Engine

Software the Recognition task uses to read and interpret the user-entered values on the image of a scanned page.

Recognition Task

A core task which identifies each page in a batch, and each field on a page. The Recognition task interprets the values in those fields, then generates a Data file (.xml) for the page, and adds the *interpreted* values to the file. Recognition often re-structures the processing batch by creating documents and assigning pages to those documents. *See also: Image File, Data file, Page, Batch, Document.*

Report Viewer

A *Taskmaster* utility that retrieves, organizes and displays an application's statistics.

These statistics track the performance of the workflow as it assembles and processes the contents of a batch – moving the batch from one task to the next until the data on every page has been read and recognized, verified and exported.

Report Viewer can present results on screen or on paper. Coverage can be complete, or “filtered” according to parameters you provide. You can call upon *Report Viewer* for spur-of-the-moment details, or for a stream of information generated according to a schedule you define.

Rescan Tasks

An iScan or kScan task in the *Rescan* mode. This task re-processes the image of a hard-to-read page. Rescanning occurs when a Verification operator or Supervisor sets aside a problem page for the attention of the FixUp operator. Typically, a task in this mode also operates in a *FixUp* mode.

RuleSet Hierarchy

The internal structure of a process that defines and applies the rules that govern a task's operations. A RuleSet Hierarchy consist of a RuleSet Type, a rule, and the actions that carry out the rule's operations.

Scan Task

A standard task that opens the workflow by scanning the pages of paper forms, generating an Image file for each page, and assigning the pages to a processing batch.

Security

Procedures that define and govern the access of individuals and workstations to an application's databases, jobs and tasks; and limit an individual's involvement in administrative activities. *See also: Administrative Privileges, Job/Task Permissions.*

Serverless Mode

The networking mode connecting Taskmaster Clients directly to the File Server that holds an application's resources instead of through a Taskmaster Server. *See also: Client/Server Mode.*

Settings File (.ini)

A file whose specifications govern certain aspects of the ways in which *Paper Keyboard* interacts with a particular task.

Shortcut Icon

An icon in the secondary *Operations* window of the *Taskmaster* window; double-clicking on the icon initiates the activities of a Job/Task combination that selects and processes a batch. An application's Security Program assigns properties to an icon and determines who can use the icon. For applications after *Taskmaster 6.0*, Connection Strings link a shortcut icon to the application and its Admin and Engine databases.

Snippet

An item in a *DocEdit* Data Entry panel that shows the image of data written or typed in a field. Operators compare the data displayed in snippets with the interpreted data in fields to determine the accuracy of data in documents.

Special Tasks

Tasks to carry out exceptional processing or storage functions.

Split

A process that identifies a document within a batch that meets certain conditions, splits the document from the batch, and assigns the document to a sub-batch for further processing.

StartBatch Data Panel

A panel that appears when a Scan task begins to ask the operator for specifics about the contents of the new batch. The panel's **Pages in Batch** amount becomes the workflow's *expected* number of pages in the batch.

Station

A computer running Taskmaster Client software and authorized to carry out one or more Job/Task combinations. Also known as workstations, *Taskmaster* security assigns each an access code; an operator can use this computer to run a task *only* if it has a valid Station ID (and the operator has a valid User ID and Password.) See also: Security.

Station Monitor

An administrative window with details about each workstation in an application's *Taskmaster* network.

Super Snippet

A type of snippet. The difference between a regular snippet and a super snippet is that operators can view a super snippet for a data entry field even though the panel does not contain a snippet for the field. *See also: Snippet, Data Entry Field*

Target Directory

A folder on the File Server containing the **Datacap** files that have been copied from the Installation CD-ROM during the opening phase of the Installation process. Installation's second phase, this directory becomes the unambiguous target to which Taskmaster Server will point as it searches for applications and data, if *Taskmaster* is running in a *client/server* mode. Similarly, Stage 3 will provide any client running in a *serverless* mode with a straight path to the target files. *See also: Client/Server Mode, Serverless Mode, File Server.*

Task Definition

A specialized set of specifications resulting in a single-purpose task that can be assigned to a Main or child job. The Task Definition provides the task with its identity; designates a Task Module to serve as the task's design and operating template; and selects numerous options from a **Task Setup** dialog to customize the task's performance. A task is a component of a Workflow Hierarchy. *See also: Workflow Hierarchy, Job.*

Task Identity

Elements of the unique identity that is a required component of a Task Definition. *See also: Task Definition.*

Taskmaster

The administrative component of a **Datacap** application. *Taskmaster* defines and manages the workflow—beginning with the physical scanning of a page, and ending when the values in its fields have been verified and exported. *See also: DocEdit, Paper Keyboard.*

Taskmaster Administrator

A secondary window of the *Taskmaster* window, used to define an application's workflows, jobs, tasks, and Security Program.

Taskmaster Client

The component of the *Taskmaster* configuration responsible for carrying out the workflow's tasks. Taskmaster Clients access the application's databases and supporting files through Taskmaster Server. The application's Security Program defines the scope of a client's activity: Administrative clients can carry out a full range of tasks and supplementary procedures. *See also: Taskmaster Server, Databases.*

Taskmaster Web

A processing environment that uses a *Taskmaster* Web Site to link remote Taskmaster Clients to an application's administrative and operating functions.

Taskmaster Server

The component of a *Taskmaster* configuration responsible for linking the system's Engine and Admin database with Taskmaster Clients *if* *Taskmaster* has been set up in a client/server mode. *See also: Taskmaster Server, Databases, Client/Server Mode.*

Taskmaster Server Service

The *service* that carries out procedures otherwise assigned to Taskmaster Server. Current **Datacap Taskmaster** configurations use Taskmaster Server Service instead of Taskmaster Server,

Task Monitor

A secondary, display-only window that appears as soon as a task selects a batch for processing, then provides up-to-the-second data as it tracks the task's progress.

Task Specifications

The custom attributes of a particular task. An Administrator uses a **Task Setup** dialog to assign Task Specifications, in the third and closing phase of the Task Definition process.

.tif File

See Image File.

User

1. An individual who fills out the fields of a paper copy of the form.
2. An individual who has access to one or more components of a **Datacap** application and its databases. The application's Security Program provides each user with a User ID and Password, and specify the limits of a user's processing and database access "privileges." *See also: Security.*

Validation

The use of **Validation** rules and a Lookup database to make sure that a field's value meets specified criteria. F

Voting

Internal procedures of a Recognition task that use multiple Recognition engines to read and interpret the value in a field. These procedures include an algorithm that settles on the most satisfactory interpretation of the value.

Workflow

A job, the tasks assigned to the job, any child jobs that branch from the job, and the tasks of these child jobs. *See also: Job, Task, Workflow Hierarchy.*

Workflow Hierarchy

The formal structure that a *Taskmaster* application employs to retrieve, interpret, verify and store the data on a scanned page. A Workflow Hierarchy has three tiers. At the top is the workflow itself, which focuses on a particular form or operates within a particular environment. Jobs are components of a workflow and occupy the second tier: a workflow usually has a Main Job, and one or more child jobs to handle special functions. Tasks are components of a job, and are on the hierarchy's third tier. *See also: Job, Task, Workflow.*