

Taskmaster Training

Scripting Actions and Forms

Scripting Actions and Forms is a **hands-on** course – and a standard component of *Taskmaster* training.

The Course begins with a review of the central role of an application's Document Hierarchy as an instantiation of the **Datacap** object.

The Course then carefully investigates two environments that are open to scripting efforts: *Rule Manager* and its **actions**, and *Batch Pilot's forms*.

The remainder of *Scripting Actions and Forms* explores the objects and techniques that a participant uses to script actions and forms. Working in the real-world environments of their laptop configurations, participants move carefully and steadily through steps that design, write, test and implement new scripts or modify existing scripts.

Who Should Attend?

Scripting Actions and Forms is a three-day course for individuals who are interested in preparing custom actions for the rules that guide an application's *RuleRunner* tasks; who would like to learn how to script the way a *Batch Pilot* form and its controls interact with, and respond to, a task; and who need practical instructions in scripting the controls of a Verification task's **Data Entry** form.

A participant in this course must be:

- A programmer who is familiar and comfortable with Visual Basic Script (VBS);
- An employee of a company or organization that is licensed to use the **Datacap Developer's Kit**;
- A graduate of Datacap's Implementation training *course*.

Participants are required to use their own laptops in class. Please visit <http://www.datacap.com/services/university/> for configuration requirements.

Course Details

Location: Datacap Training Center, 660 White Plains Road, Tarrytown, NY

Time: Days 1-3, 9:00AM to 4:00PM. Lunch break: 12:00AM to 1:00PM.

Dress: Casual

Instructors

Tom Stuart

Mr. Stuart directs Datacap's pre-sales engineering activities, which provides streamlined solutions for expediting implementation of capture systems. He is responsible for developing easy-to-replicate techniques that help customers rapidly deploy complex data capture applications, most of which are integrated with other business applications. Mr. Stuart is also closely involved with refining prototype solutions.

Prior to Datacap, Mr. Stuart directed staff development for Datastorm Technologies, developer of Procomm Plus, a leading communications software package. Mr. Stuart helped initiate Datastorm's early development of Internet compatibility, enhancing its market position and ultimately leading to the company's acquisition by Quarterdeck.

Mr. Stuart's dual background in education and product development gives him unique perspective on the theory and practical application of data capture and data processing practices. He is widely quoted on technical issues and frequently addresses industry conferences.

Miller Bryan

Since joining Datacap as Project Manager in 1997, Mr. Bryan has overseen hundreds of system implementations on a wide variety of operating platforms. He is adept at analysis, design, configuration, and installation of all **Datacap Taskmaster** products.

Mr. Bryan also conducts Datacap training for Taskmaster administrators and system managers, both at corporate headquarters, and at customer sites.

Before joining Datacap, Mr. Bryan was Assistant Call Center Manager and Internal Training Manager for software developer Quarterdeck (now part of Symantec), which marketed software for computer diagnostics, security and memory management.

From 1983 to 1992, Mr. Bryan served in the U.S. Navy as training specialist and fire control, level E6.

COURSE CONTENT

Day 1: Scripting Actions

The course's opening day reviews the hierarchical structure of the **Datacap** object (DCO) and the ways in which you can write and test scripts affecting the DCO as it covers these topics:

- A. The Setup DCO vs. the Runtime DCO
 - 1. **Batch** Level: Objects and Properties
 - 2. **Document** Level: Objects and Properties
 - 3. **Page** Level: Objects and Properties
 - 4. **Field** Level: Objects and Properties
- B. The Application-specific Document Hierarchy as an Instantiation of the **Datacap** Object
 - 1. The Document Hierarchy of the *Humanitarian Relief Fund* application
- C. The Datacap File Structure
 - 1. Standard Scripts
 - a. File Structure
 - b. Datacap Standards
 - 2. Custom Scripts
 - a. File Structure
 - b. Datacap Standards
 - 3. Overriding Actions
- D. Actions
 - 1. Actions as Functions
 - 2. Standard Actions vs. Custom Actions
 - 3. Structure of an Actions Library File (.rra)
 - 4. Action Scripting Objects
 - a. **Datacap** Object (DCO)
 - b. **Pilot** Object

- c. Additional Objects
- E. Writing an Action – First Steps
 - 1. Locating the Action within an Actions File
 - 2. Required Arguments
 - 3. Action Parameters
 - 4. *True/False* Returns
 - 5. Adding your Custom Action to a Project
 - 6. Testing the Action and Logging Test Results
- F. Writing an Action – Additional Considerations
 - 1. The **bInteractive** Argument
 - 2. The **bDebug** Argument
 - 3. The *Writelog* routine
 - 4. Passing and Validating Multiple Values
- G. The **Datacap** Object (DCO)– Another Look
 - 1. The DCO Hierarchy: **Batch**, **Document**, **Page**, and **Field** Objects
 - 2. Key Properties and Methods of the **Datacap** Object
 - 3. Parent/Child Relationships
 - a. Node Indexes
 - b. Level-to-Level Activity
 - c. **FindChild** Actions
 - d. **GetChild** Actions
 - e. How to Reference a Parent
 - f. Testing Level-to-Level Actions
 - 4. The **CurrentObj** Object
- H. Exercises in Action Scripting
 - 1. Scripting Conventions

Day 2: Scripting Actions - Lab

The Course's second day is a lab session where students identify and write 10 or more scripts to enhance the capture process.

Participants explore and modify the scripts of forms used by the *Humanitarian Relief Fund* application.

Day 2 covers these topics:

A. Action Scripting Techniques to:

1. Reference INI File Values
2. Reference Batch-level Confidence Requirements
3. Check Math across Fields
4. Carry out Checkdigit Verification
5. Dynamically Check Document Integrity
6. Document Hierarchy: Enforce Parent/Child Relationships
7. Check Field Criteria and Values
8. Check Group Criteria and Values
9. Lookup Field Values
10. Accomplish other Validations – Field Values
11. Use an Action to Test for Quick Export of a Batch

Day 3: Scripting Forms

Day 3 is devoted to the scripting of forms. The student learns the concepts, code and procedures that determine how a **Data Entry** panel retrieves field-level data and images of a *recognized* page; displays the information in the panel's fields; and updates these values with an operator's changes or with the results of the Verify task's Validation procedures. The course also covers writing a standalone *Batch Pilot* application.

Day 3 covers these topics:

A. The *Batch Pilot* Workshop

1. How to Use the **Batch Pilot Window**
2. Standard Scripting Tools and Procedures

B. Evaluating and Modifying the Scripts of an Existing Form

- C. Core Sectors of a Form's Script
 - [General]
 - FormDriver
 - Pilot
 - UserForm
- D. Controls: Scripting Events
- E. Scripting the **Data Entry** Panel Form
 - 1. Global Variables
 - 2. Required Functions
 - 3. Optional Functions
 - 4. The Panel Control
 - 5. Data Edit Field Controls
 - 6. Snippet Field Controls
 - 7. Button Controls
 - a. Navigation Buttons
 - b. Other Buttons
 - 8. Label Controls
 - 9. Grid Controls
- D. Writing a Batch Pilot Form from Scratch
 - 1. Early Binding of Active Components
 - 2. Using the Microsoft Scripting.FileSystemObject
 - 3. Using the Datacap File Browsing Control
 - 4. Reading Data into a DCO
 - 5. Setting up the *Batch Pilot* Form to Run from the Desktop