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# Introduction to Datacap Studio

Welcome to Datacap Studio – and to this *Guide to Datacap Studio*.

The *Guide to the Datacap Studio* describes the four pages of Datacap Studio and its development environment. The guide also presents step-by-step descriptions of the Datacap Studio procedures.

Chapter 1 covers these topics:

|  |            |
|--|------------|
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***Very important!*** **Taskmaster 7.5** supports applications of two kinds: *Taskmaster* and *Taskmaster RRS*.

- *Taskmaster* applications use Rulemanager to construct the application's Document Hierarchy; to set up its fingerprints; and to define the rules that will guide the application's *Rulerunner* tasks as they process the contents of a batch.
  - A *Taskmaster RRS* application uses Datacap Studio to perform the configuration that previously was done in Rulemanager.
- ✓ Chapter 4 describes the structure and elements of the *Taskmaster RRS* application.

### 1.1 Introduction

The *Guide to the Datacap Studio* describes the many features of this essential development tool, and shows you how to use Datacap Studio's features to:

- Explore and possibly modify your application's Document Hierarchy.
  - Define and test the rules that determine how *Rulerunner* tasks recognize pages, and recognize, validate and export data.
  - Put together the fingerprints that supply the *source* pages in a batch with the locations of their fields, and assign recognition parameters to particular fields.
- ✓ This text is a PDF file (**DStudio.pdf**) in the **Docs/Dstudio** folder of your **Datacap** directory. The text includes a Glossary and an Index of the topics that are covered by the *Guide to Datacap Studio*.

*Please note:* Throughout this Guide, "Datacap Studio" is often referred to as "DStudio."

#### 1.1.1 Typographic and Terminology Conventions

This Guide uses the following typographic and terminology conventions.

| Convention:   | Example:   |
|---|--|
| DStudio Pages are in <b>bold</b> type.                  | The <b>Rulemanager Page</b> defines RuleSets and Rules.  |
| Windows and dialog names are in <i>BoldItalic</i> type. | Settings in the <i>Taskmaster Administrator</i> define Users and User Groups.                      |
| Tabs are in <i>italics</i> .                            | <i>Document Hierarchy, Properties</i> and <i>Workflow</i> are tabs of the <b>Test Page</b> window. |
| Field names are in <b>Bold</b> type.                    | The <b>Task ID</b> field identifies a task that's part of an application's workflow.               |
| Button names are in Regular type.                       | Click on the OK button.  |
| Drop-down list items are in <i>Italic</i> type.         | The <i>Rulerunner</i> module is an option in the <b>Task Module</b> drop-down list.                |
| The names of RuleSets are in <b>Bold</b> type.          | <b>Validate</b> RuleSets confirm both <i>alphanumeric</i> and <i>numeric</i> values.               |
| The names of Rules are in <b>Bold</b> type.             | This <b>Validation</b> rule confirms both <i>alphanumeric</i> and <i>numeric</i> values.           |

## Typographic and Terminology Conventions (continued)

| Convention:  | Example:  |
|--|---|
| The names of actions are in <b>Bold</b> type.  | This <b>Validation</b> rule uses an <b>Is_Numeric</b> action.                                     |
| Examples of a function and its actions are in Courier New type font.                           | Clean: 1TotalWages Rule1<br>FilterValue( "" )   |
| <b>Datacap Taskmaster</b> products, utilities and application names are in <i>Italic</i> type. | <i>Taskmaster</i> is a product, <i>Rulemanager</i> is a utility, <i>1040EZ</i> is an application. |
| Menu names and items are in <b>Bold</b> type.  | Select <b>Workflow</b> from the <b>Settings</b> file  |

### 1.1.2 If You Need Help

Here is the number for Datacap's technical support:

✓ **914-259-1300**

If you need to **fax** Datacap technical support, the fax number is:

✓ **914-366-0500**

If you want to **e-mail** Datacap technical support, the e-mail address is:

✓ [support@datacap.com](mailto:support@datacap.com)

To reach Datacap Support on the Web, go to:

✓ <http://support.datacap.com>

## 1.2 Supporting Documentation

The table below lists additional **Datacap Taskmaster** documentation with particular relevance to the setup and operation the **Datacap Studio**.

You will find PDF versions of these texts in the **Docs** folder of your configuration's **Datacap** directory.

| Text   | Chapter | Description  |
|--|---------|--|
| <i>Taskmaster Administrator's Guide</i>                | 2       | A thorough examination of the <i>Taskmaster</i> architecture...and of its contributing components. |
| <i>Taskmaster Installation and Configuration Guide</i> | .       | Install <b>Datacap Taskmaster</b>  |

Supporting Documentation (continued)

| Text  | Chapter | Description  |
|---|---------|--|
| <i>Taskmaster Administrator's Guide</i>           | 4       | A hands-on review of the nature and components of the <i>Taskmaster</i> application, using the instantly accessible and unbreakable <i>1040EZ</i> training application for examples.   |
| <i>Taskmaster Administrator's Guide</i>           | 5       | Details of <i>Taskmaster's</i> Application Security specifications and requirements.   |
| <i>Guide to Taskmaster Rules</i>                  | 3       | A broad explanation of the nature and definition of an application's Document Hierarchy; and of its <b>Batch</b> , <b>Document</b> , <b>Page</b> and <b>Field</b> objects.   |
| <i>Guide to Taskmaster Rules</i>                  | 7-10    | The setup and operation of tasks in four categories: Scan, Rulerunner, Verify and FixUp.<br><br>Individual chapters pay special attention to the dialogs used by these tasks. Chapter 10 looks carefully at the development and modification of the Verify tasks' <i>Data Entry</i> panels.  |
| <i>Rulemanager Reference</i>                      | 4       | A guide to all actions that can be assigned to the rules that determine the nature and scope of a task's procedures.<br><br><b>Very important!</b> These explanations are repeated in the <b>Actions Information</b> that is immediately available from the <i>Actions Library</i> tab of DStudio's <b>Rulemanager Page</b> .  |
| <i>Taskmaster Windows &amp; Dialogs Reference</i> | All     | A handy, comprehensive guide to the windows and dialogs on the <i>Taskmaster</i> side of your Taskmaster or Taskmaster RRS or Taskmaster RRS configuration<br><br>The information in this reference is also available in <i>Taskmaster Help</i> . For a list of all topics, press the <b>Help</b> icon in the <b>Taskmaster Window</b> ; for topics covering the current window or dialog, press your keyboard's F1 key. |
| <i>Guide to Taskmaster Web</i>                    |         | Guide to <i>Taskmaster Web</i> for scanning and verifying data from remote locations over the Internet.  |
| <i>Guide to Datacap Taskmaster Documentation</i>  | All     | An interactive listing of all texts and their chapters, with instant access to each text.  |
| <i>Summary Index of Documentation Topics</i>      | All     | An interactive list of topics covered throughout <b>Datacap Taskmaster</b> documentation, with instant access to the relevant text.  |