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## Modifying the Document Hierarchy

A Document Hierarchy gives a *Taskmaster RRS* application its design and operating foundation. (For an introduction to *Taskmaster RRS* applications, see Chapter 4).

The *Document Hierarchy* tab is a prominent component of each DStudio page: its tools manage the application's Document Hierarchy; display the hierarchy's objects, and their properties and variables; and provide instant information about the RuleSets and rules assigned to the objects.

Chapter 5 shows you how to use the *Document Hierarchy* tab of DStudio's **Rulemanager Page** to set up and modify an application's Document Hierarchy.

The chapter's contents include:

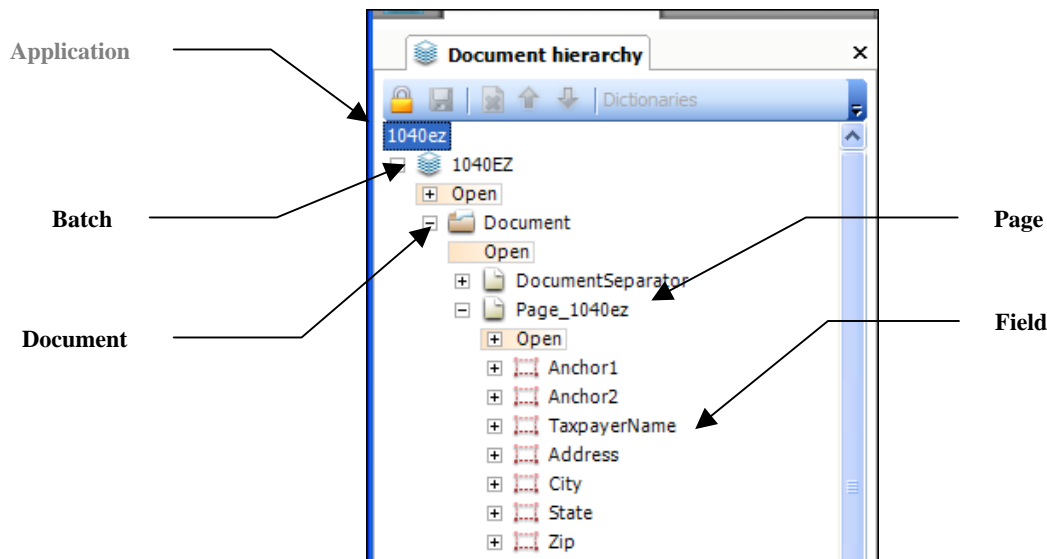
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## 5.1 Rulemanager Page: Document Hierarchy Tab

A Document Hierarchy is the core component of this tab – *and* the core component of the *Taskmaster RRS* application itself.

- ✓ The Document Hierarchy is an XML file that typically resides in the application’s **Process** directory. By default, its structure and contents appear in this tab as soon as you open Datacap Studio.

Here is an opening view of the *1040EZ* application’s Document Hierarchy (*1040.xml*).



**Survey DStudio - Rulemanager Page  
Document Hierarchy tab**

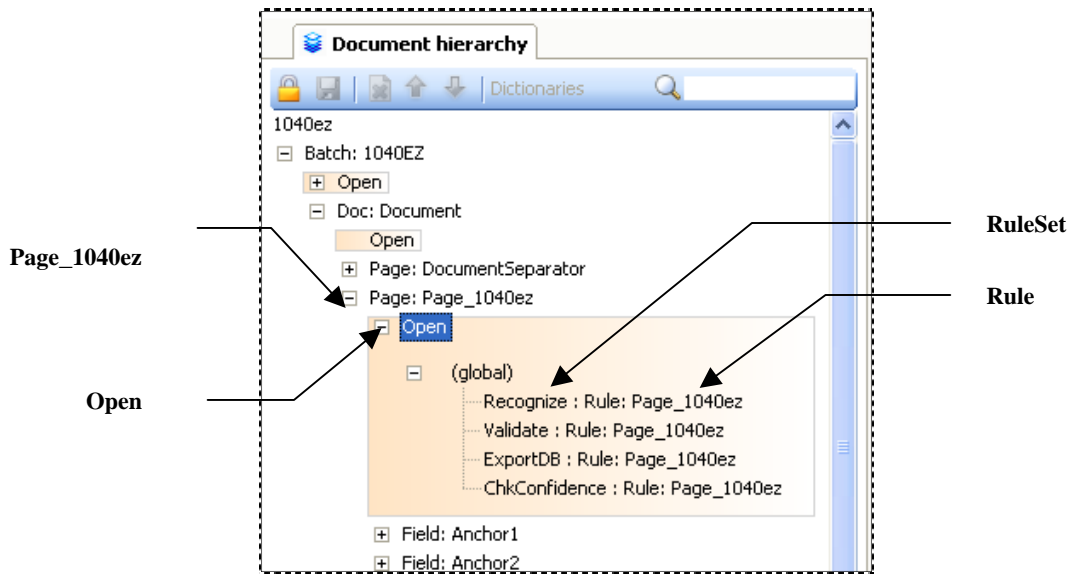
This illustration above lists objects at four levels:

- **Application.** *Very important!* This level is *not* a true member of the tree because it contains only an Application ID rather than an object name, and therefore cannot be the parent of objects at any other levels. Still, the **Application** does have important properties; for details, see Page 12.
- **Batch.** The single object at this level represents the application’s foremost processing entity: it is the parent of objects at every other level. The **Batch** object’s name – *1040EZ*, in this case – is also the name of the Taskmaster workflow that creates and processes a batch and its contents (Chapter 4). A batch can hold an object at any of the lower levels, including documents, pages and fields.
- **Document.** A typical application uses a *Rulerunner* task to organize a batch into a series of documents, and assign pages to each document. The **Document** object

(*Document*, above) is the parent to one or more **Page** objects that represent the pages that will be part of each processed document. A document can also be the parent of field objects.

- **Page.** A **Page** object usually corresponds to a single document image. It may have different Page Types. Most fields exist at the **Page** level.
- **Field.** Data that has been recognized, manually entered, or created by rules is usually stored in **Field** objects. Although most commonly on the **Page** level, fields can be at the **Batch** or **Document** level. In addition, “sub-fields” can be stored in other fields.

✓ **Very important!** The boxed and shaded **Open** container holds RuleSets and rules tied to a particular object. Here is an example from the *1040EZ* application:



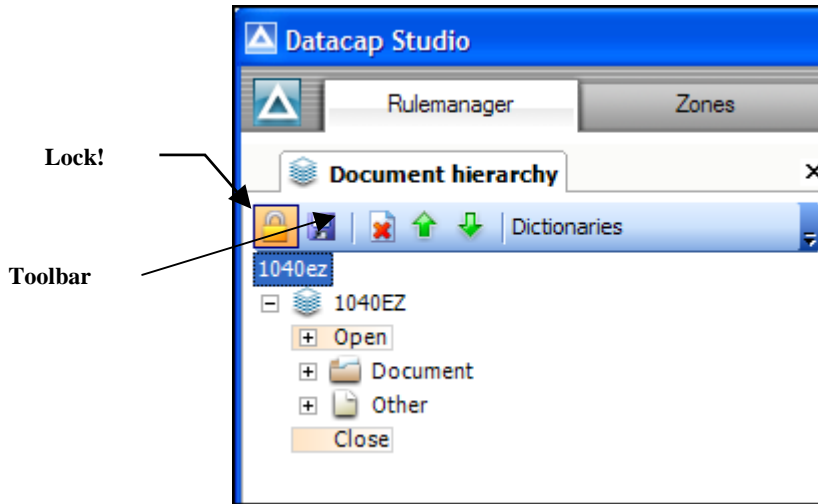
The **RuleSet/Rule combinations** illustrated above determine how a task processes the page and its data when the page is **Open** and available.

✓ This **Page** object also has a **Close** container. Any RuleSet/Rule combinations you place here will be carried out *after* all rules involving children of the page – its fields, in this case – have been carried out. Often, these rules close a database that was first opened by a RuleSet/Rule combination in the page’s **Open** container.

### 5.1.1 Toolbar Icons of the Document Hierarchy Tab




The *Document Hierarchy* tab’s toolbar has seven icons. However, most are *unavailable* until you depress the **Lock** toggle switch.

- ✓ **Very important!** This toggle step is as significant as it is simple because it frees the remainder of the toolbar and other aspects of the Document Hierarchy (see the explanation in the table below.) It locks *out* other users from making changes to the Document Hierarchy.


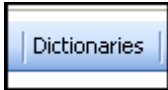
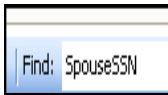


Document Hierarchy Tab’s Toolbar – *Locked Mode*

From left to right, the toolbar includes:

Icon	Description
	When you depress this toggle switch, Datacap Studio “locks” the Document Hierarchy, and most features of the tab.  The <i>locked</i> mode locks out other users by ensuring that they cannot make changes to the Document Hierarchy..  <b>Be sure</b> to un-lock the tab after you have finished. Remember, too, that you will not be able to modify the current Document Hierarchy if you have been locked out by another user.
	This icon saves any changes you make to the Document Hierarchy.
	The <b>Delete</b> icon removes objects of the Document Hierarchy ( <i>without a warning</i> ).

Toolbar Icons of the Document Hierarchy Tab (continued)

Icon	Description
	These arrows move a selected object up or down within the same level of the Document Hierarchy.
	You can use this icon to define a dictionary of alternative values for a field and assign the dictionary to a specific <b>Field</b> object.  (Page 9 explains the role of a <b>Dictionary</b> property and shows you how to use this icon.)
	<b>Find</b> locates an object within the Document Hierarchy when you specify its name.

- ✓ **Don't forget!** The toolbar and the Document Hierarchy are not available until you toggle the **Lock** icon into its *Locked* mode.

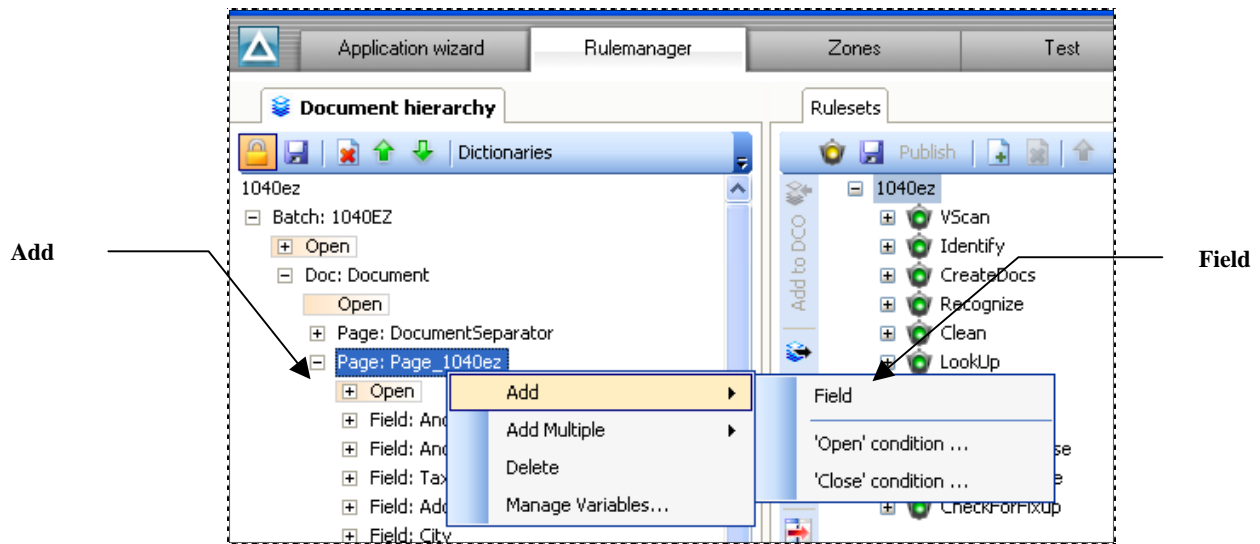
## 5.2 How to Modify the Document Hierarchy

Chapter 2 of this manual shows you how to use Datacap Studio's **Application Wizard Page** to put together a new *Taskmaster RRS* application. An essential and preliminary procedure involves the design and development of the application's Document Hierarchy.

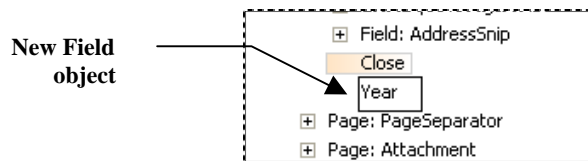
This chapter reviews the steps you take to modify the Document Hierarchy. To begin, you can follow the steps below to add new objects (using the *1040EZ* application for examples.)

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

1. Lock the Document Hierarchy by depressing the **Lock** icon. (*Don't forget!*)
2. **Right-click** on the *parent* object of the proposed new object: *Page\_MyNewApp* in the example below. (You cannot add a **Batch** object.)
3. Select the **Add** or **Add Multiple** option (Page 8 shows you how to add multiple objects.)
4. Click on the type of object you're adding – **Field**, in the example. (Chapter 6 shows you how to add *Open* or *Close* conditions.)



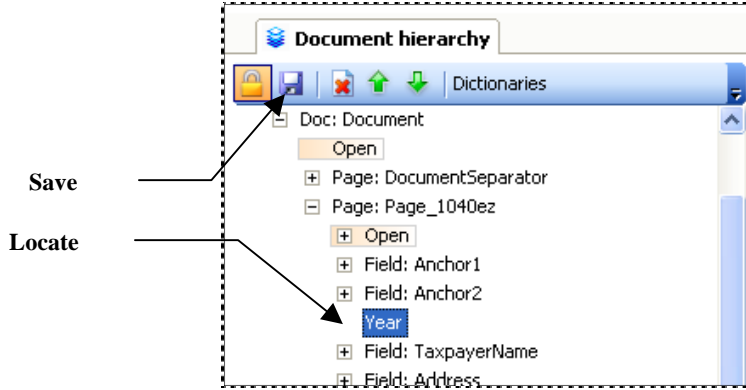
5. Locate a blank new object at the bottom of the listing of the *parent* object's children, and give it a name:



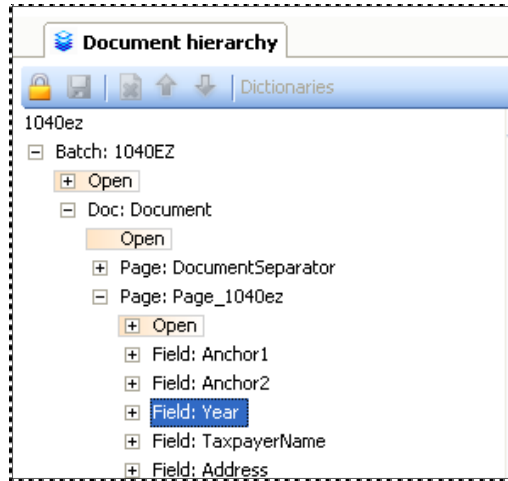
How to Modify the Document Hierarchy (continued)

Step	Action
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- Use the Arrow tools to place the new object in its correct location.



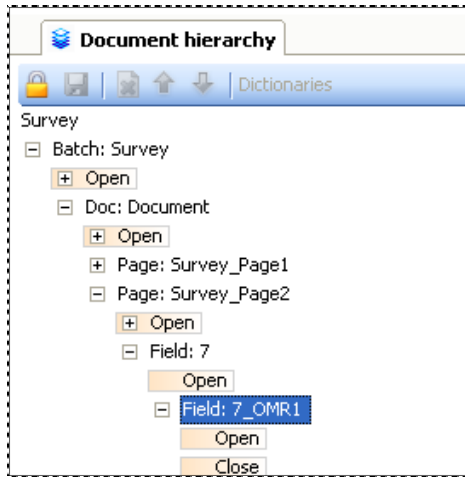
- Save the object's information: be sure that it is listed as a **Field** object of the *1040EZ* Document Hierarchy (in this case) and a child of the *Page\_1040ez* **Page** object.



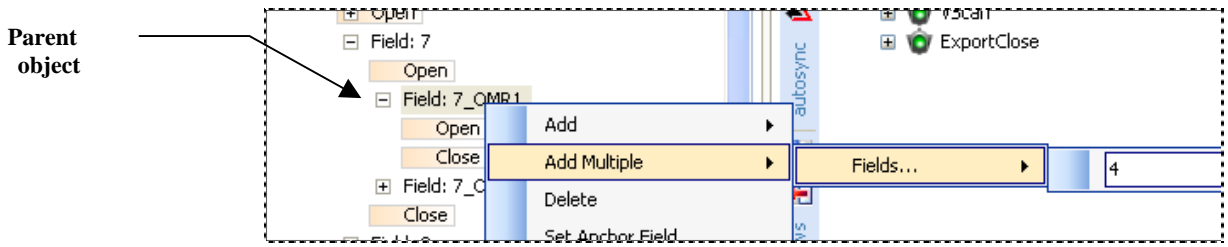
- Toggle the **Lock** icon to update the Document Hierarchy with your changes, and to release the updated application to other authorized users.

## 5.2.1 How to Add Multiple Objects in One Step

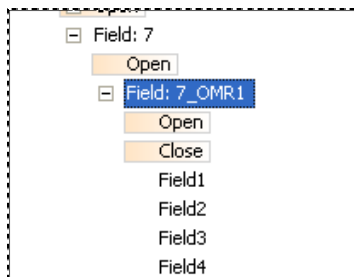
Step	Action
1.	Lock the Document Hierarchy (using the <i>Survey</i> application below, for examples.)
2.	Right-click on the <i>parent</i> object.



3. Select **Add Multiple** – and the applicable object type (**Fields**, in this example.)
4. Click on the shaded area to the right. When a Data Edit field appears, enter the number of new objects (“4” in the example.)

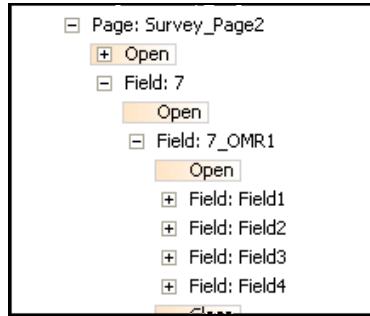


5. Press the Enter key on your keyboard.
6. Confirm that Datacap Studio has placed the correct number of *child* objects under the *parent* object.



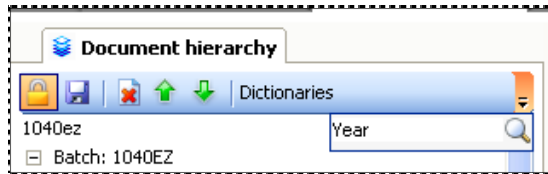


- 7. Press the toolbar's **Save** icon and the **Lock** icon. Be sure that the new fields are correctly designated as **Field** objects.



### 5.2.2 Arrows, Deletions and Dictionaries

- Unlocking the Document Hierarchy releases it to any member of the development team who first locks it. When you lock the Document Hierarchy, five previously grayed-out icons are now available: these are described on Page 4.



**Save** retains any changes you make – *if* you follow up by releasing the **Lock** icon.

deletes a highlighted object *and* its children.

**↑** and **↓** move a highlighted object up and down within the same level of the Document Hierarchy. *Important!* The Document Hierarchy remembers the result of a move only if you save it and unlock it.

#### 5.2.2.1 Dictionaries

A **Dictionary** is a property of an Optical Mark Recognition (OMR) field – and maps the field's options.

A typical dictionary consists of:

- A unique **ID**: "PageIDs", for example
- Multiple **Words** such as "Page1", "Page2", "Page3"
- **Values** representing each word: 1, 2, 3 (for example)

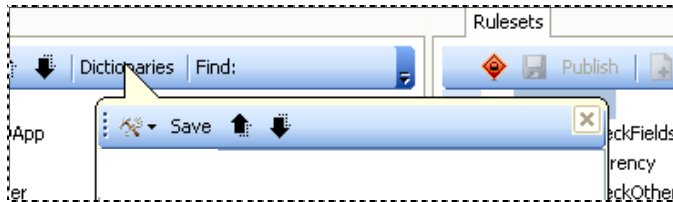
When a Verify task runs, the words appear as a drop-down list in the applicable field. Meanwhile, the corresponding selected values often become part of an Export file or database.

## How to Modify the Document Hierarchy

To set up a new dictionary, take these steps:

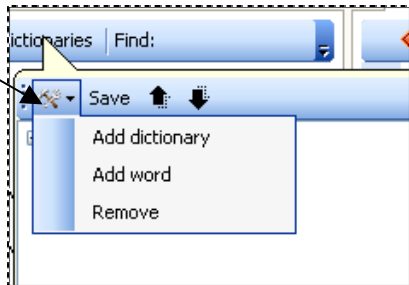
Step	Action
------	--------

1. **Lock** the Document Hierarchy!
2. Press the **Dictionaries** icon to open the *Dictionaries* dialog.



3. Click on the Edit button.

Press this button.

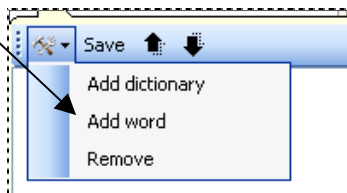


4. **Lock** the Document Hierarchy!
5. Select **Add Dictionary**.
6. Enter a unique Dictionary ID:



7. Press the Save button.
8. Click on the Edit button and select **Add Word**.

Select this option

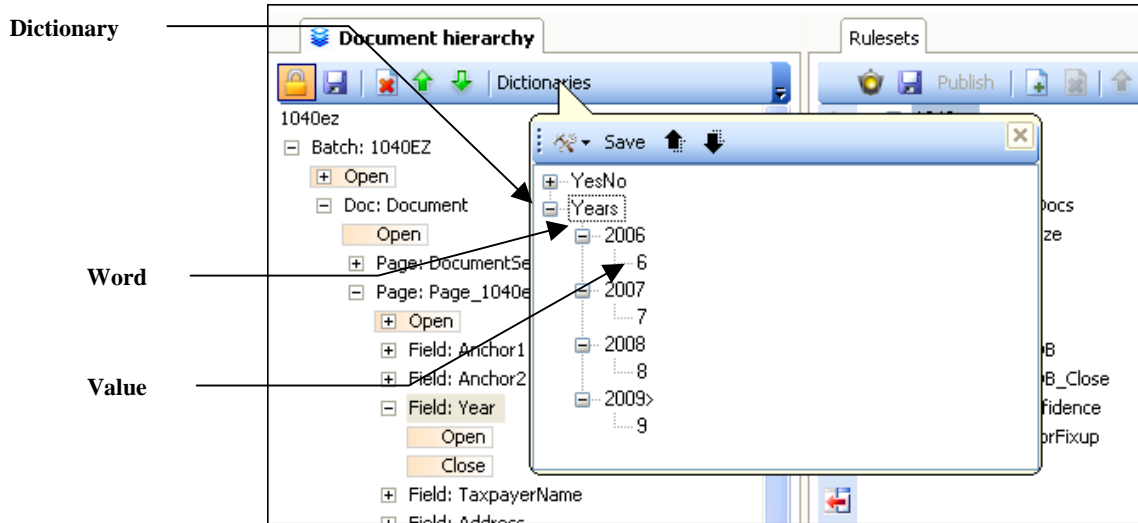


9. Repeat Step #7 for each word in the Dictionary.

How to Define a Dictionary (continued)

Step	Action
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10. To add a value to word, open the word's hierarchy and insert the value:



11. Repeat Step #9 to add more values

12. Press the Save button – and the Document Hierarchy's **Save** icon.

- ✓ Page 17 examines properties of objects at various levels of the Document Hierarchy, and shows you how to add and modify properties and their values – including the **DICT** property that identifies a dictionary you have defined and assigned to a **Field** object.

### 5.2.3 How to use the Find Icon

The **Find** icon at the right edge of the tab's toolbar conducts a straightforward search for an object of the Document Hierarchy that you specify by entering a name in the accompanying field.

A search is confined to levels and objects of the Document Hierarchy; it does not look for properties, RuleSets or rules.

**Please note:** a search will only match whole words, and only find the first instance of the match.

### 5.3 Managing the Document Hierarchy's Levels and Objects

After you press the **Lock** icon and *right-click* on an object of the Document Hierarchy, a set of management options appears on your screen.

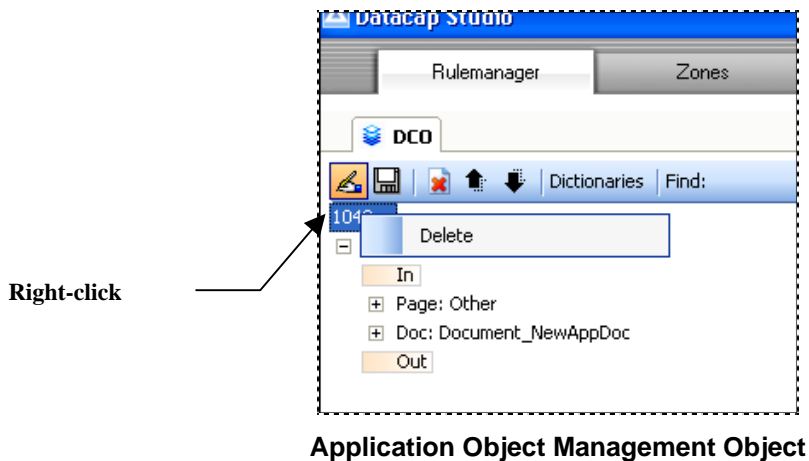
- ✓ The nature and number of options depends on the level and object you have selected: even the Application ID at the top offers an option.

(The descriptions in this section use the *1040EZ* application provided by Datacap for examples.)

#### 5.3.1 Application Level

The *Delete* option removes the application's Document Hierarchy – a *radical step* for an *Taskmaster RRS* application which is firmly in place.

On the other hand, if you are putting together a sample application such as *MyNewApp*, the **Delete** option is an easy way to eliminate the Document Hierarchy and evaluate the results of this step throughout Datacap Studio and throughout the application.



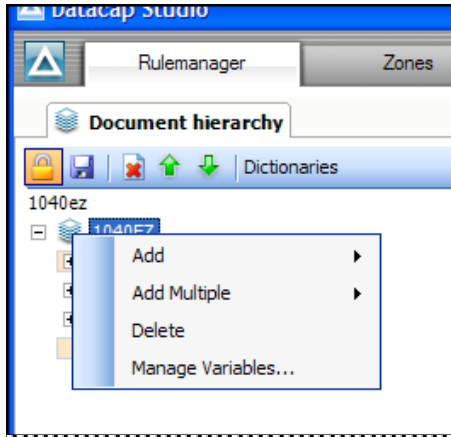
- ✓ **Very important!** Before you use this procedure, save the Document Hierarchy file (.xml) in a safe location under a different name.

#### 5.3.2 Batch Level

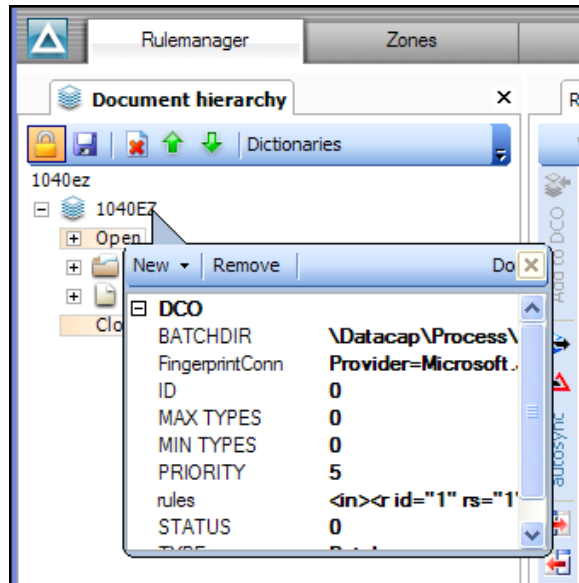
The **Batch** object has the Object Management options depicted on the next page. When you right-click on this object:

- ◆ *Add* gives you a chance to add children to the **Batch** object. Note that in addition to documents, a batch can be the parent of a **Page** object (such as the *Other* page) – even a **Field** object.

- ◆ *Add Multiple* places multiple children under the **Batch** object in one step (see Page 8).
- ◆ *Delete* removes the **Batch** object and *all* objects below it. Again, this is a radical move that deserves careful planning and consideration. **Alert!** If you inadvertently delete this or any other object, unblock the Document Hierarchy without saving it to restore the original version.
- ◆ *Manage Variables* opens the *Object Properties & Variables* dialog. This dialog lists an object's *setup* properties and its *runtime* variables and their values. Page 17 explores this dialog.



Batch Object Management Options



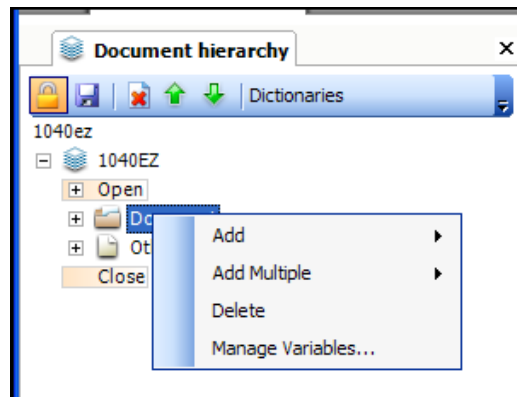
Properties & Variables Dialog – Batch object

### 5.3.3 Document Level

The Object Management options of the **Document** object are the same as those of the **Batch** object.

**Remember:** Right-click on the object's name to view these options.

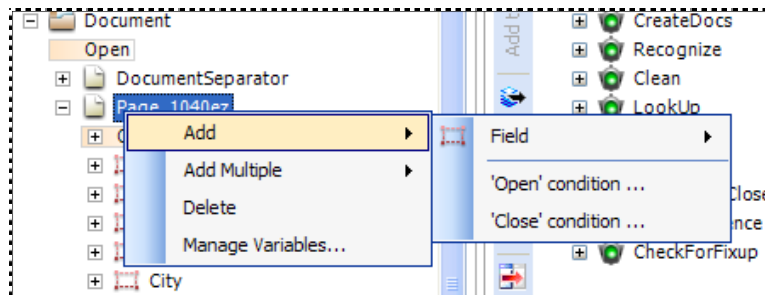
- ✓ The properties and variables of the **Document** object differ slightly from those of the **Batch** object. For details, see Page 19.



**Document Object – Management Options**

### 5.3.4 Page Level

A **Page** object's Management Options are more limited because you can only add fields to the page, and remove pages along with their fields:



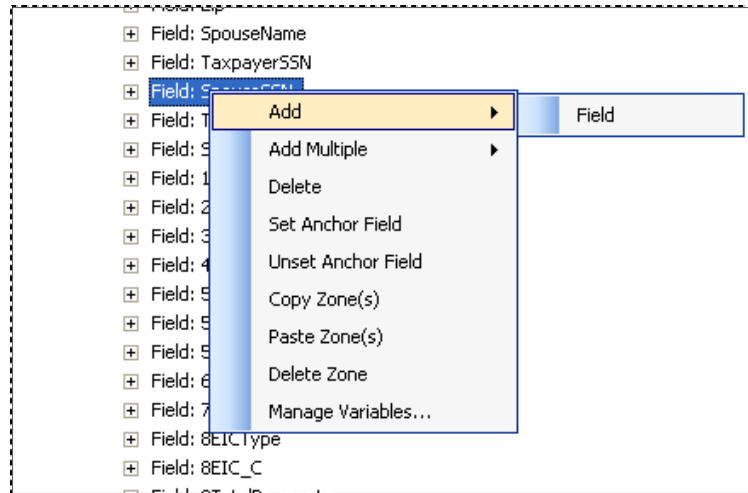
**Page Object – Management Options**

Page 20 describes the properties and variables of the **Page** object.

### 5.3.5 Field Level

The focus of the *1040EZ* application –and of your *Taskmaster RRS* application, too – is on the fields of a **source** page such as *Page\_1040EZ*.

Because of its relative importance, the **Field** object typically has a long list of Management Options:



**Field Object Management Options**

This table describes the options for a **Field** object.

Option	Description
Add	Adds a single <b>Field</b> object as a child of the field you've highlighted.
Add Multiple	Adds multiple <b>Field</b> objects as children of the highlighted field (Page 8).
Delete	Deletes the field and any children it may have. <b>Alert!</b> Datacap Studio removes fields without a warning.
Set Anchor Field	Allows fields represented by the highlighted <b>Field</b> object to serve as anchors.  Typically, an <b>anchor</b> field does not contain data. Instead, it features a strong visual feature that a <i>rulerunner</i> task can use to identify and straighten a <i>source</i> page.  This option combines with special settings in the <b>Field</b> object's <i>Properties &amp; Variables</i> dialog and tools in the <b>Zone Page</b> (Chapter 7).
Unset Anchor Field	Deprives a <b>Field</b> object of its ability to serve as an anchor.

### Management Options – Field Objects (continued)

Option	Description
Copy Zone(s)	Copies the <b>zone</b> that surrounds the field you have highlighted, from one <b>fingerprint</b> to another.  <i><b>Important!</b></i> This option is only available when you are working in the <b>Zones Page</b> (Chapter 7).
Paste Zone(s)	Pastes a copied zone to the <b>Field</b> object you highlight.  <i><b>Important!</b></i> This option is only available when you are working in the <b>Zones Page</b> (Chapter 7).
Delete Zone	Removes the zone surrounding the <b>Field</b> object you have highlighted (Chapter 7).
Manage Variables	Opens the <b>Field</b> object's <i>Properties &amp; Variables</i> dialog.



## 5.4 Document Hierarchy Objects - Properties & Variables

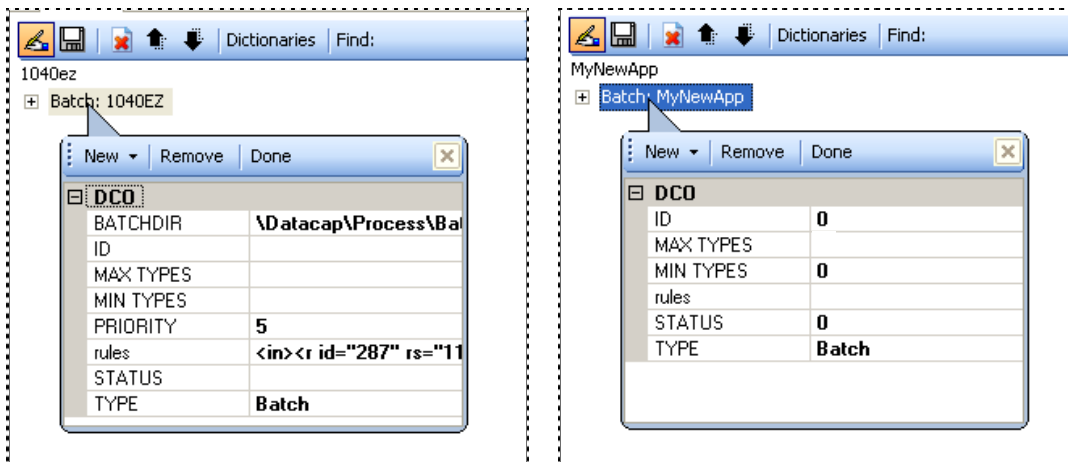
If you right-click on an object of the Document Hierarchy and select the **Manage Variables** option, the *Properties & Variables* dialog will appear on your screen.

- ✓ The dialog’s contents will differ depending on:
  - the nature of the object – is it a **Batch**, **Document**, **Page** or **Field** object? (This dialog does not appear with the top-level **Application**.)
  - *Setup* properties and values you have added.
  - *Runtime* variables. Tasks assign values to these variables when they run.

This section describes the basic properties and variables for objects at each level. Page 28 reviews additional properties and variables.

### 5.4.1 Batch Properties and Variables

Below are two versions of the *Properties & Variables* dialog for a **Batch** object - one for the well-worn *1040EZ* application, the other for a *MyNewApp* application. (*Don’t forget!* You cannot open this dialog until you have depressed the **Lock** icon.)



1040EZ: Properties & Variables

MyNewApp: Properties & Variables

The table on the next page describes the properties and variables in these illustrations.

Note that the new application’s dialog appears to be missing two properties: **BATCHDIR** and **PRIORITY**. Note, too, differences in the properties’ values.

Batch Object – Properties and Variables

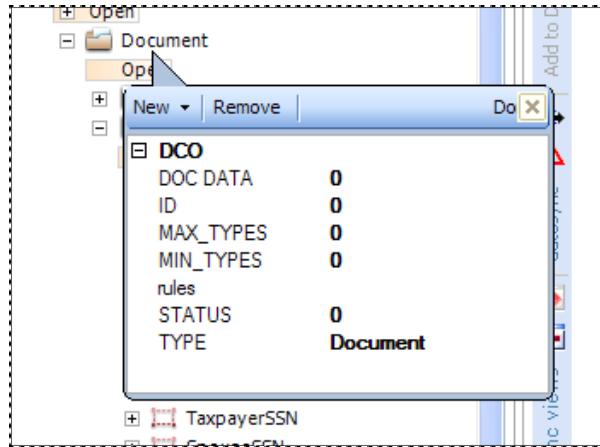
Property/Variable	Assigned Value	Description
BATCHDIR	\Datacap\Process\ Batches	The name of an optional <i>runtime</i> variable.  \Datacap\Process\Batches is the variable's stand-in value; during processing, a Scan task assigns an actual value.
ID	0	An optional <i>runtime</i> variable that will contain the current Batch ID.  "0" is the variable's stand-in value; during processing, the current task assigns the actual value: <b>20060228.005</b> , for example.
MAX_TYPES	0	The <i>maximum</i> number of document <i>types</i> that can be part of the <i>runtime Batch</i> object, one level below in the Document Hierarchy.  Specifying that <i>MAX_TYPES = 3</i> for a <b>Batch</b> object means that a batch cannot have more than three documents of different types.  "0" indicates that there is no maximum – and is the customary value for this setting.
MIN_TYPES	0	The minimum number of document <i>types</i> that <i>must</i> be children of the <i>runtime Batch</i> object... one level below in the Document Hierarchy.  "0" indicates that there is no minimum.
rules	<in> <r id= "287" rs="Clean" > </out>	XML "attributes" that designate the RuleSet/ Rule combinations assigned to this <b>Batch</b> object, by specifying Rule IDs and RuleSet names.  This <i>setup</i> property is automatically updated when you add new rules or remove existing rules. (Chapter 6).
PRIORITY	5	<b>The default property that is assigned to a runtime batch.</b>  <b>Priority</b> values range from "1" ( <i>high</i> ) to "10" ( <i>low</i> ): "5" is the default value. This value is superseded by values assigned by individual Taskmaster jobs.

Batch Object – Properties and Variables (continued)

Property/Variable	Assigned Value	Description
STATUS	<i>Numeric</i>	A <i>runtime</i> value with a number representing the processing status of the batch.  <i>Alert!</i> This is a required property.
TYPE	<i>Batch</i>	The nature of the object.  You <i>cannot</i> change this value.

### 5.4.2 Document Properties and Variables

To review the default properties and variables of a **Document** object, right-click on the document’s title and select the **Manage Variables** option:



The *Manage Properties & Variables* has these default settings:

Property/Variable	Assigned Value	Description
DOC DATA	0	A variable data holder assigned by rules at run time.
ID	0	A <i>runtime</i> variable that can contain a Document ID.  The Document ID is usually an extension of the Batch ID: 20060228.005.01, for example.

Document Properties and Variables (continued)

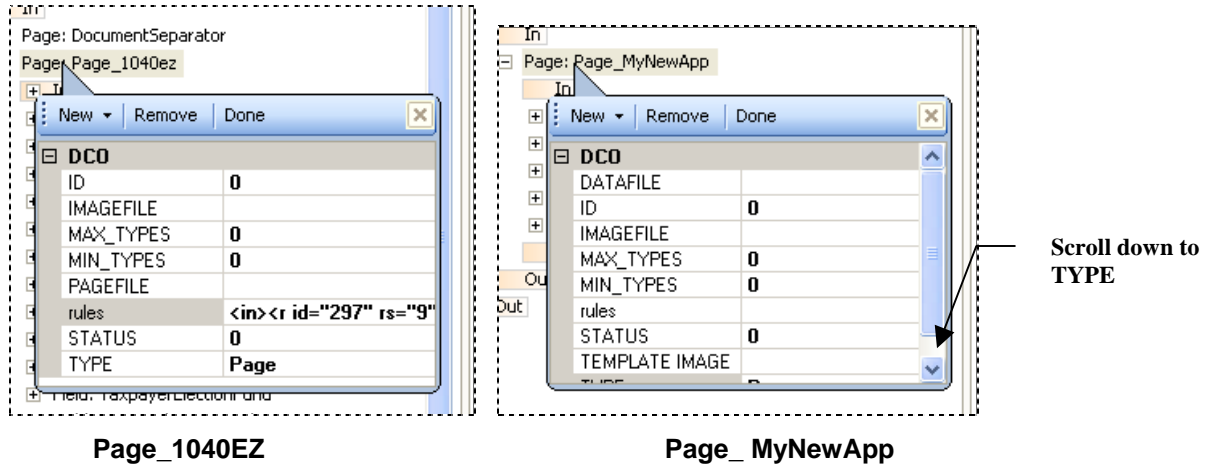
Property/Variable	Assigned Value	Description
MAX_TYPES		The maximum instances of any object that can occupy the <b>Page</b> level, one level below the <b>Document</b> level.
MIN_TYPES		The minimum instances of any object that must occupy the <b>Page</b> level, one level below the <b>Document</b> level.
Rules	Syntax:  <pre>&lt;in&gt; &lt;r id= "nnn" rs="aaa" /&gt; &lt;/out&gt;</pre>	XML “attributes” that designate the RuleSet/Rule combination(s) assigned to this <b>Document</b> object, by specifying the rules’ ID’s and the RuleSets’s names.  This <i>setup</i> property is automatically updated when you add new rules or remove existing rules (for details, see Chapter 6.)
STATUS	0	A <i>runtime</i> variable that can hold the processing status assigned to the current document.  “0”, for example, might indicate an acceptable document and “1” a problem document.
TYPE	<i>Document</i>	The nature of the object.  You <i>cannot</i> change this value.

### 5.4.3 Page Properties and Variables

A **Page** object’s default properties and variables are similar but *not* identical to those of a **Batch** or **Document** object.

- ✓ Furthermore, contents of the *Properties & Variables* dialog may differ from page to page – depending on the roles the pages play. For example, production of the *MyNewApp* application automatically provides every page including the *Other* and *Attachment* pages with a full set of properties and variables.

Administrators of *1040EZ*, on the other hand, have steadily removed unnecessary elements of the application’s *source* page: *Page\_1040EZ*. The table on the next page, however, describes all standard properties and variables of the **Page** object.



Page Object: Properties and Variables

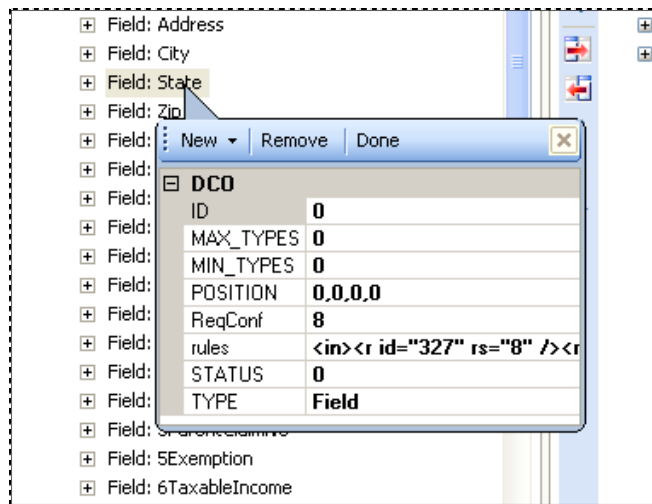
Property/Variable	Assigned Value	Description
DATAFILE		A <i>runtime</i> variable that can contain the name and path of the Data file (.xml) for the current <i>source</i> page.  Note that <b>DATAFILE</b> is usually not a variable of the <i>Page_1040EZ Page</i> object., although it may be at <i>runtime</i> variable.
ID	0	A <i>runtime</i> variable that can contain a Page ID.  “0” is a stand-in value. An actual Page ID typically has this syntax: <b>tm000001</b> .
IMAGEFILE		A <i>runtime</i> variable that can contain the name and path of the Image file (.bmp) for the current page.
MAX_TYPES	0	The maximum instances of any object that can occupy the <b>Field</b> level, one level below the <b>Page</b> level.
MIN_TYPES	0	The minimum instances of any object that must occupy the <b>Field</b> level.
PAGEFILE		A <i>runtime</i> variable that can contain the name and path of the current Page file (<task>.xml).  Note that <b>PAGEFILE</b> is not a default variable of the <i>Page_MyNewApp Page</i> object.

Page Object: Properties and Variables (continued)

Property/Variable	Assigned Value	Description
rules	Syntax: <code>&lt;in&gt; &lt;r id="nnn" rs="aaa" /&gt; &lt;/out&gt;</code>	XML “attributes” that designate the RuleSet/Rule combination(s) assigned to this <b>Page</b> object, by specifying the rules’ ID’s and the RuleSets’ names.  This <i>setup</i> property is automatically updated when you add new rules or remove existing rules. (For details, see Chapter 6).  There are no values for the <i>Page_MyNewApp</i> page because rules have not yet been assigned to this <b>Page</b> object.
STATUS	0	A <i>runtime</i> variable that can hold the processing status assigned to the current page.  “0”, for example, might indicate an acceptable page and “1” a problem page.
TYPE	<i>Page</i>	The nature of the object.  You <i>cannot</i> change this value.

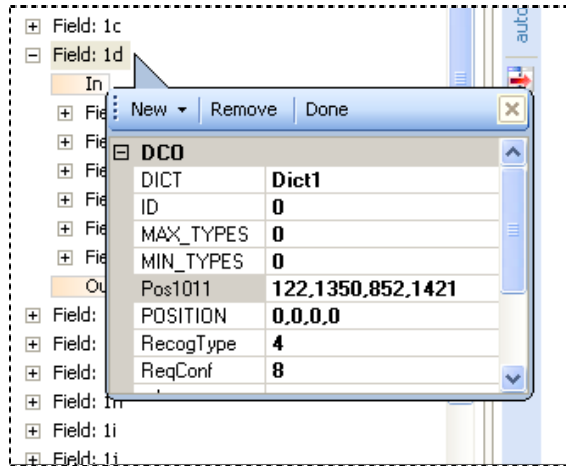
### 5.4.4 Field Properties and Variables

For some **Field** objects, the list of properties and variables is short.

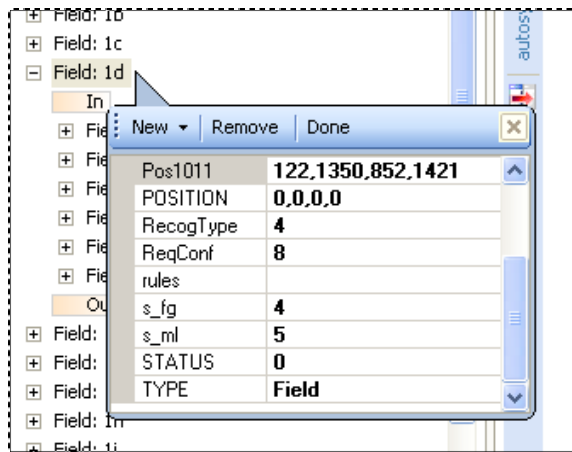


**Properties and Variables of the State Field  
1040EZ Application**

For other **Field** objects, the list is longer:

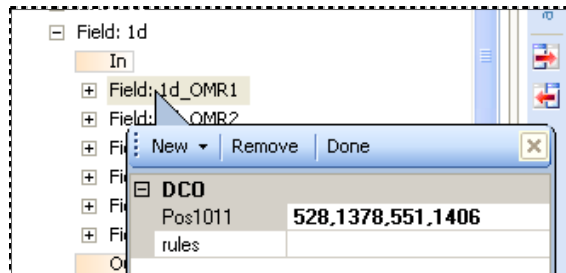


Survey Application – Field 1d (upper)



Survey Application – Field 1d (lower)

- ✓ Sometimes, a **Field** object has almost nothing!



Survey Application – Field 1d\_OMR1

The table on the next page describes a **Field** object’s default properties and variables.

Properties and Variables of Field Objects

Property/Variable	Assigned Value	Description
ID	0	A <i>runtime</i> variable that can contain the name of the <b>Field</b> object.
MAX TYPES	0	<i>Not applicable to Field objects.</i>
MIN TYPES	0	<i>Not applicable to Field objects.</i>
POSITION	0,0,0,0	Placeholders for four coordinates that locate a field of the parent <b>Page</b> object.  The coordinates define a rectangle: X1 (Left), Y1 (bottom), X2 (Right), Y2(top). Because these are placeholders, each coordinate is “0”.  A rulerunner task replaces the default “0”s with the four values that locate a field on a specific page. The task then assigns these values to the field’s <b>Position</b> property, in the Data file (.xml) for that page ( <b>tm000001.xml</b> , for example.)
ReqConf	8	The <i>minimum</i> Confidence Rating for this <b>Field</b> object.  A field’s actual Confidence Rating is the lowest of the ratings of <i>recognized</i> characters in the field
rules	Syntax:  <in> <r id= "nnn" rs="aaa" /> </out>	XML “attributes” that designate the RuleSet/Rule combination(s) assigned to this <b>Field</b> object, by specifying the rules’ ID’s and the RuleSets’ names.  This <i>setup</i> property is automatically updated when you add new rules or remove existing rules (Chapter 6).
STATUS	0	A <i>runtime</i> variable that can hold the processing status assigned to the current field.  “0”, for example, might indicate an acceptable field and “1” a problem field.
TYPE	<i>Field</i>	The nature of the object.  You <i>cannot</i> change this value.



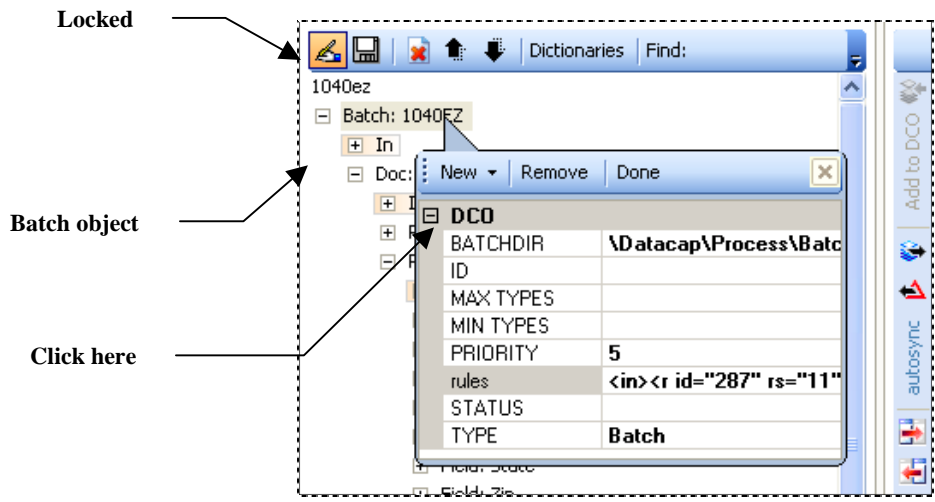
- ✓ Other properties and variables deserve your attention, including:

Property/Variable	Assigned Value	Description
DICT	Dict1	This is the name of a dictionary with words that appear as alternative values in a Verify task's <i>Data Entry</i> panel.  <b>DICT</b> is the property's ID; Dict1 is the dictionary's name. Page 9 describes the steps you take to define a new dictionary.
Length	<i>Numeric</i>	This property specifies a field's maximum length in terms of characters, spaces and punctuation.
Lookup	<i>Connection String</i>	The value you assign to this property is a Connection String that links the field to a table in a Lookup database.
Order	<i>Numeric</i>	The relative placement of this <b>Field</b> object in the workflow's processing queue if the object is a sub-field.
Pos1011	122,1350,852,1421	These are coordinates of the field's <b>POSITION</b> property for a specific fingerprint – in this case, Fingerprint 1011.  Datacap Studio will automatically insert a new <b>PosNNNN</b> property when you zone this field on another fingerprint (Chapter 7).
Text	<i>Alphanumeric</i>	A property of the <b>Field</b> object that signifies a "sticky" field.  This means that the field will default to this until a user changes it. .
RecogType	4	<b>Important!</b> Datacap Studio's Field Zoning procedures establish the three properties in this group – <b>RecogType</b> , <b>s_fg</b> , and <b>s_ml</b> . (Chapter 7).
s_fg	4	<i>Field Zoning property (Chapter 7)</i>
s_ml	5	<i>Field Zoning property (Chapter 7)</i>

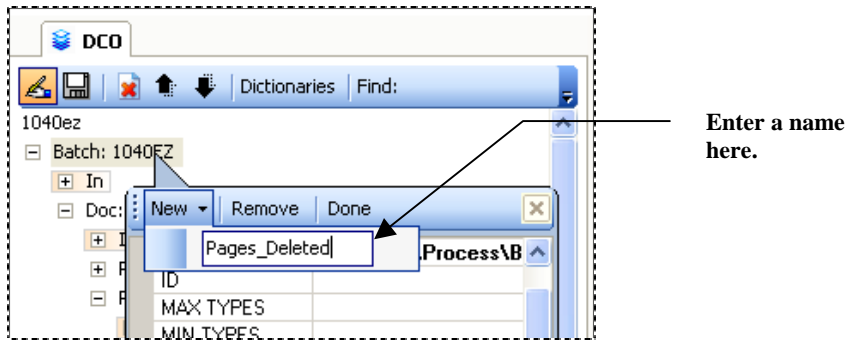
### 5.4.5 How to Add or Remove Properties and Variables

To add a new property or variable, take these steps:

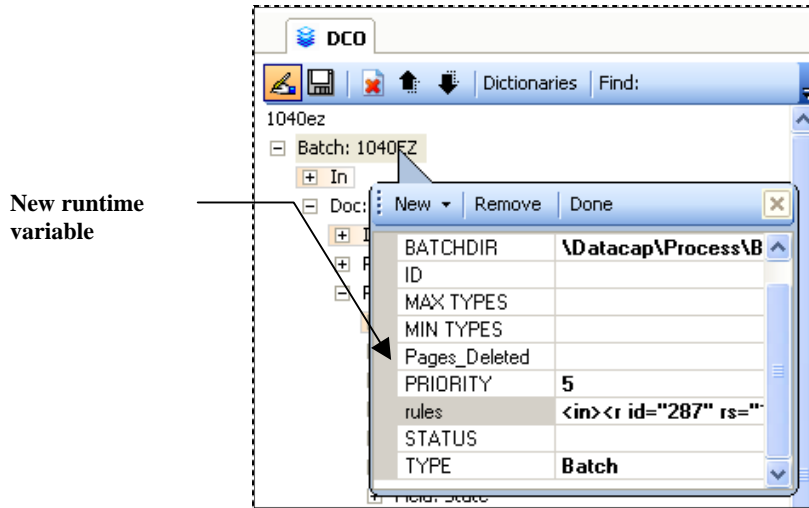
- | Step | Action   |
|------|--|
| 1.   | <b>Remember!</b> Toggle the Document Hierarchy's tab's <b>Lock</b> icon to its <i>Locked</i> position. |
| 2.   | Right-click on the object to which you are adding a property or variable.                              |
| 3.   | Select <b>Manage Variables</b> to open the <i>Properties &amp; Variables</i> dialog.                   |



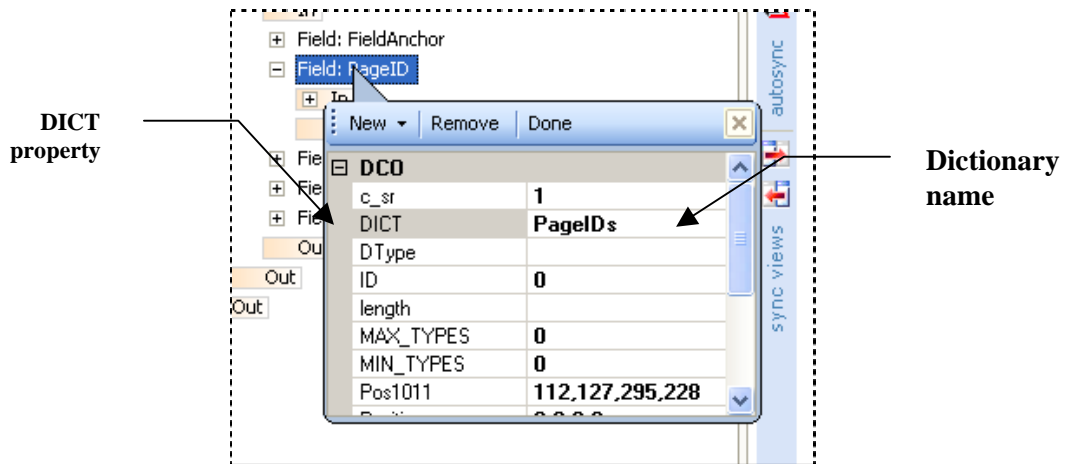
4. Press the New button to expose a blank data field. Enter a brief but clear name for the property or variable.



5. Press your keyboard's Enter key. If you are adding – or even defining – a new *setup* property, enter a value in the field next to the property. The **DICT** property, for example, needs the name of a dictionary you have defined (Page 9).
6. Press the dialog's Done button. Close the dialog and click on the *Document Hierarchy* tab's Save button.



**Properties & Variables Dialog –  
1040EZ Batch Object**

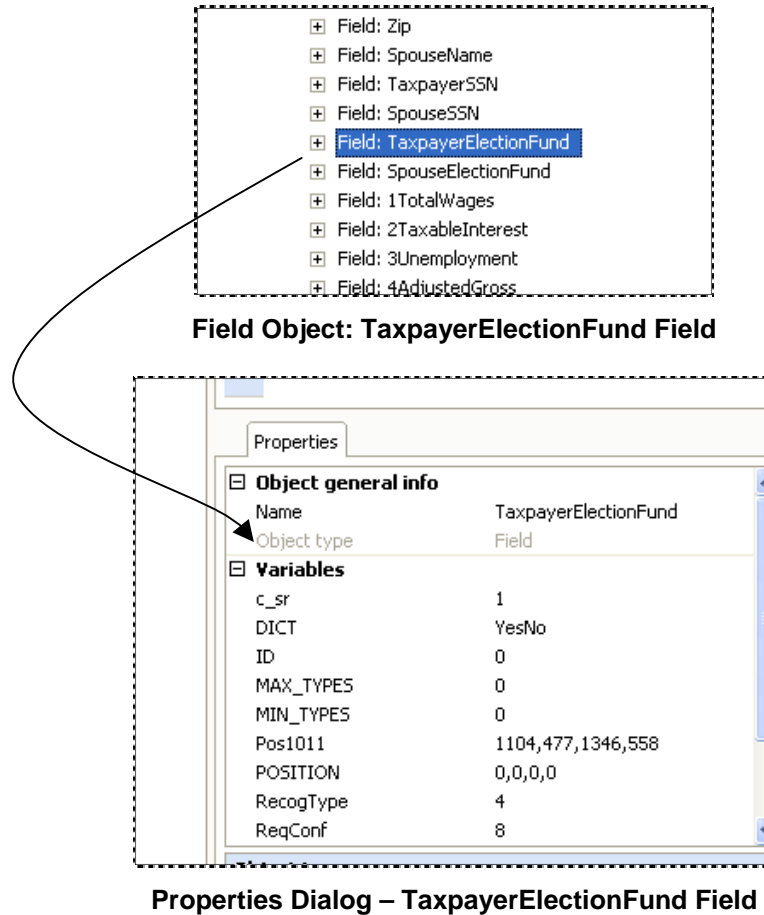


**Properties & Variables Dialog -  
MyNewApp Field Object**

- ✓ Although the distinction between a setup *property* and a runtime *variable* is not rigid, two broad guidelines apply:
  - Values are assigned to **properties** during the setup of the application’s Document Hierarchy and its fingerprints. These values do not change when tasks run.
  - Actions that are part of a rule’s function may assign values to variables as the tasks that apply these rules run.

## 5.5 How to Use the Properties Dialog

When you select an object of the Document Hierarchy, the *Properties* dialog contains information similar to this:



Usually, the *Properties* dialog duplicates the information in the object's *Objects and Properties* dialog (Page 17).