

Glossary

Datacap Studio

This Glossary contains brief definitions of terms associated primarily with Datacap Studio, and secondarily with *Taskmaster* and *Taskmaster Web*.

Action

A concise procedure that is part of a rule.

A rule, in turn, is a member of a Ruleset – a category such as **Locate**, **Recognition**, **Validate**. The resulting Ruleset/Rule combination is bound to an object of an application's Document Hierarchy.

To be effective, the Ruleset itself must be part of a Task Profile, and the Task Profile has to be linked to a rulerunner task...a task that applies rules made up of actions.

See also: Datacap Studio, Document Hierarchy, Ruleset, Task Profile.

Admin Database

The application database that contains definitions of workflows, jobs, tasks, users and workstations. *See also: Engine Database, Rules Database, apps.ini file*

Application

The principal organizing entity of a *Taskmaster* configuration.

Datacap Studio supplies a *Taskmaster* application with these essential components:

- a Document Hierarchy is the application's structure, with clearly defined objects at four levels: **Batch**, **Document**, **Page** and **Field**.
- Fingerprints with information about the nature of the application's *source* page, and about the fields on the page.
- Rules made up of one or more actions designed to carry out very specific processing steps.
- Rulesets that accumulate rules in a particular category – **Validate** rules, for example.
- Ruleset/Rule combinations that are bound directly to objects of the Document Hierarchy.

- Task Profiles containing one or more Rulesets, and associated with a specific rulerunner task

See also: Datacap Studio, Document Hierarchy, Rulesets, Task Profiles.

Batch

An application's processing vehicle and container.

Usually created by a Scan task, the batch moves from task to task within a job, and is stored in an application's **Batches** directory. The contents of a batch typically include Image files, Data files, Page files and (optionally) Log files. Export files often are not part of a batch; instead, they reside in a separate **Export** directory.

Note: Directly or indirectly, all tasks and batches rely on the overall structure of the Document Hierarchy provided by Datacap Studio; the properties of objects at every level; and the Ruleset/Rule combinations bound to various objects.

Breakpoint

A testing tool that intentionally halts a task's processing activity at a specific Ruleset, at a member of the Ruleset, or when a Task Profile is processing a specific page or field. A breakpoint is set in Datacap Studio's **Test** page.

.CCO File

A Recognition file that is one part of a fingerprint with two files (the other is an Image file). The Recognition file contains information about the location of fields on the fingerprint, and results from Datacap Studio's fingerprint zoning process.

Recognition files are also generated for each *source* page when a rulerunner task such as Recognize runs.

Client

See also: Taskmaster Client, Taskmaster Web Client.

Confidence Level

A value between "0" and "9" stipulating a minimum degree of certainty on the part of a "recognition" task that it has accurately interpreted data in a particular field of a *source* page, or has accurately recognized the page itself.

"0" is the least stringent rating, while "9" means that a Recognition task will accept a field's value only if it has interpreted the value with complete confidence.

Custom Rule Execution Condition

A Ruleset/Rule combination that goes into effect if the processing task encounters a specific condition associated with the bound object.

Datacap Studio

A *Taskmaster* application's essential development tool.

You use Datacap Studio to:

- Define, explore and possibly modify your application's Document Hierarchy.
- 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.
- Define and test the Ruleset/Rule combinations that determine how rulerunner tasks recognize pages, and recognize, validate and export data.
- Assign Rulesets to Task Profiles.
- Test and debug the components of your application.

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.” Microsoft's ODBC drivers allow a system using one type of database (an Access database, for example) to import data from a database of a different sort (perhaps a SQL Server database or DB2 database.) *See also: Application, Engine Database, Admin Database, Rules Database*

Data Edit Field

An interactive field of a Verification task's *Data Entry* panel.

A data edit field is linked to a particular field of a *source* page and may contain its *recognized* value. After reviewing the field's image, an operator can correct the value in the data edit field if there is an error.

In contrast, an Index task uses data edit fields exclusively for data entry.

See also: Data Entry Panel, Source Page

Data Entry Panel

An interactive panel with fields that correspond to certain fields on a *source* page.

A panel may present an operator with a field's *recognized* value alongside the *image* of the field and its value. After comparing the two values, the operator can make whatever changes are necessary to the value in the interactive data edit field.

Operators of an Index task solicit data from the full image of a *source* page, and enter the data directly into the panel's fields.

Data File (.xml)

A file containing values in fields of a *source* page, and certain supplementary values. After a “recognition” task fully processes a *source* page, the task adds these values to a Data file it assembles just for that page. If the succeeding Verification task alters a value, the task updates the Data file (.xml).

Datacap Studios defines the Ruleset/Rule combinations that establish Data files, and binds these combination the applicable object(s) of the Document Hierarchy.

Document

An object on the second level of the Document Hierarchy set up by Datacap Studio: usually, a **Document** object consisting of one or more **Page** objects.

In response to Rulesets assigned to the Task Profile of a rulerunner task, the task identifies the documents in the current batch, and the pages in each document.

Document Hierarchy

An application’s superstructure – with objects at four levels: **Batch**, **Document**, **Page** and **Field**. Objects have *setup* and *runtime* properties and variables

Ruleset/Rule combinations are bound to specific objects of the Document Hierarchy: the Rulesets can be assigned to Task Profiles.

A Document Hierarchy is an application’s central component, and the organizing product of Datacap Studio.

Engine Database

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

Field

An object at the lowest level of an application’s Document Hierarchy –and an element of a **Page** object one level above.

File Server

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

Fingerprint

A template made up of two files with information about an application’s *source* page. An Image file(.tif) displays the complete page; a Recognition file (.cco) contains details of the locations of fields within the fingerprint, and the nature of the data in certain fields.

Datacap Studio's **Zones** page creates fingerprints and zones their fields. Zoning provides information to the Recognition file.

High Confidence Value

A value in a field of a scanned page which a rulerunner task interprets with a degree of confidence that equals or exceeds the application's requirements. *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/Task Combination

The workflow's *fundamental processing unit*, forged by the assignment of a specific task to a specific job. *See also: Workflow, Job, Task*

Lock

A Datacap Studio mode that locks out other users by ensuring that they cannot make changes to the Document Hierarchy.

Be sure 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.

Main Job

A workflow's primary job, usually consisting of tasks in at least four categories: Scan, Recognition, Verification and Export.

Recognition, Verification and Export tasks are rulerunner tasks that operate in response to the rules of Rulesets assigned to Task Profiles prepared in Datacap Studio..

Object

An element of an application's Document Hierarchy. The hierarchy has objects at four levels: **Batch**, **Document**, **Page** and **Field**. The properties of an object as well as the Ruleset/Rule combinations bound to the object determine how rulerunner tasks process the object. *See also: Document Hierarchy, Rules-based Task.*

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.

Page File (.xml)

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 file, the next task in the workflow refers to the Page file for processing benchmarks. *See also: Data File.*

Page Type

The unique identifying property of a **Page** object of the Document Hierarchy.

Datacap Studio assigns these values when setting up the Document Hierarchy.

Panel

See Data Entry Panel.

Recognition Task

The rulerunner task that is responsible for identifying the *source* pages in a batch; reading and interpreting values in the fields of these pages; and adding to the recognized values to a Data file for each page. Most Recognition tasks also organize the contents of a batch into a series of documents and their pages.

Because a Recognition task is a rulerunner task, it responds to the rules of the Rulesets associated with a unique Task Profile.

Recognized Value

The *interpreted* value in a field of a *source* page.

Rule

A set of instructions that determines how a task is to carry out a narrowly-defined activity involving a single object of the Document Hierarchy.

A rule consists of one or more functions, and a function has one or more actions.

A rule belongs to a Ruleset – a category such as **Locate** or **Export**. Together, a Ruleset/Rule combination is bound to a specific object of the Document Hierarchy. The Ruleset, in turn, is assigned to a Task Profile...and the Task Profile is associated with a rulerunner task.

Datacap Studio is responsible for constructing an application's Document Hierarchy –and for defining Rulesets, rules, and Task Profiles..

Rulerunner Service

The service that manages the ways in which Taskmaster Client's *rulerunner* tasks retrieve and respond to the details embedded in their Task Profiles.

Rulerunner Web Service

The Rulerunner Service set up to run on the Internet rather than locally.

Ruleset

A group of rules in a single category such as **Locate**. A Ruleset consists of one or more rules. A Ruleset/Rule combination is bound to an object of the Document Hierarchy; the Ruleset is usually assigned to a Task Profile.

Server

See Taskmaster Server, Taskmaster Web Server

Source Page

A scanned page containing values that are to be located, read, interpreted, verified and exported.

Sync Icon

Icons that determine how Datacap Studio's **Rulemanager Page** displays the way a Ruleset/Rule combination is bound to objects of the Document Hierarchy – or all the Ruleset/Rule combinations of a particular object.

Task

The processing component of a job. A task must be part of a job; a job must be part of a workflow. The task's identity is defined in *Taskmaster*. However, a rulerunner task's Task Profile is defined in Datacap Studio.

Taskmaster

The administrative engine of an application. *Taskmaster* defines and manages the workflow—beginning with the physical scanning of a page, and ending when the values in the fields of a *source* page have been verified and exported. *See also: Source Page.*

Taskmaster Administrator

A secondary window of the *Taskmaster Window*, used to define an application's Workflow Hierarchy and Security Program. In a *Taskmaster Web* environment, the **Administrator** page is responsible for these procedures. *See also: Administrator Page.*

Taskmaster Client

Objects of a *Taskmaster* configuration responsible for initiating and monitoring tasks – and for accessing 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 Server Service

The object 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: Client/Server Mode, Databases.*

Taskmaster Web

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

Taskmaster Web Client

The object of a *Taskmaster Web* configuration that initiates and monitor tasks – and accesses an application’s databases and supporting files – over the Internet through Taskmaster Web Server to the Taskmaster Web Site.

Taskmaster Web Server

The Internet Server which is host to the Taskmaster Web Site. The Taskmaster Web Server connects to a Datacap configuration’s Taskmaster Server which, in turn, links clients to the configuration’s File Server. *See also: Taskmaster Web Site.*

Task Definition

Taskmaster Client steps that provide a task with a unique identity and Task Module, and assign it to a job.

Task Setup

The procedure that connects a Task Definition drawn up in **Taskmaster Administrator** to the applicable Task Profile for a *rulerunner* task, or an alternative Task Settings file.

User

1. An individual who fills out the fields of a paper copy of a form.
2. An individual who has access to a *Taskmaster* 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.”

Workflow

The top level of a *Taskmaster* application's Workflow Hierarchy. A workflow includes jobs, the tasks assigned to a job, any child jobs that branch from the job, and the tasks of these child jobs.

A Workflow ID is identical to the Batch ID at the top level of Datacap Studio's Document Hierarchy.

Workflow Hierarchy

The formal structure that an 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 objects of a workflow and occupy the second tier: a workflow usually has a Main job, and may have child jobs to handle special functions. Tasks are objects of a job, and occupy the hierarchy's third tier. *See also: Job, Task, Workflow.*

Zones

Demarcations of fields in a fingerprint. Zones provide a fingerprint's Recognition file (.cco) with location values.