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Welcome

Welcome to *Rule Manager*…and to the *Rule Manager Reference*!

This text takes *Rule Manager* information from a variety of sources and consolidates it in a single reference that covers:

- *Rule Manager* configurations
- Elements of the **Rule Manager Window**
- Fingerprints and Rules
- Zones
- Actions.

Chapter 1 covers these topics:

The *Rule Manager Reference* is supported by extensive documentation available in printed and electronic (PDF) formats. The following texts will be especially helpful:

Guide to Taskmaster Rules. This how-to text examines the steps you take to set up a **rules-based** application, define the rules that govern its tasks, and define and operate the tasks themselves.

Guide to Batch Pilot. This text explores the development of Task Projects that serve as the foundations for **rules-based** tasks that operate in response to the processing rules you define with *Rule Manager*.

The *Rule Manager Reference* is also supported by an **Actions** Help file. This Help file explains how you assemble RuleSet Types and define individual rules, and describes each of the many actions which are available to you. To open the Help file, click on the **?** icon in the **Actions** sector of ***Rule Manager Window's** Rules* panel:
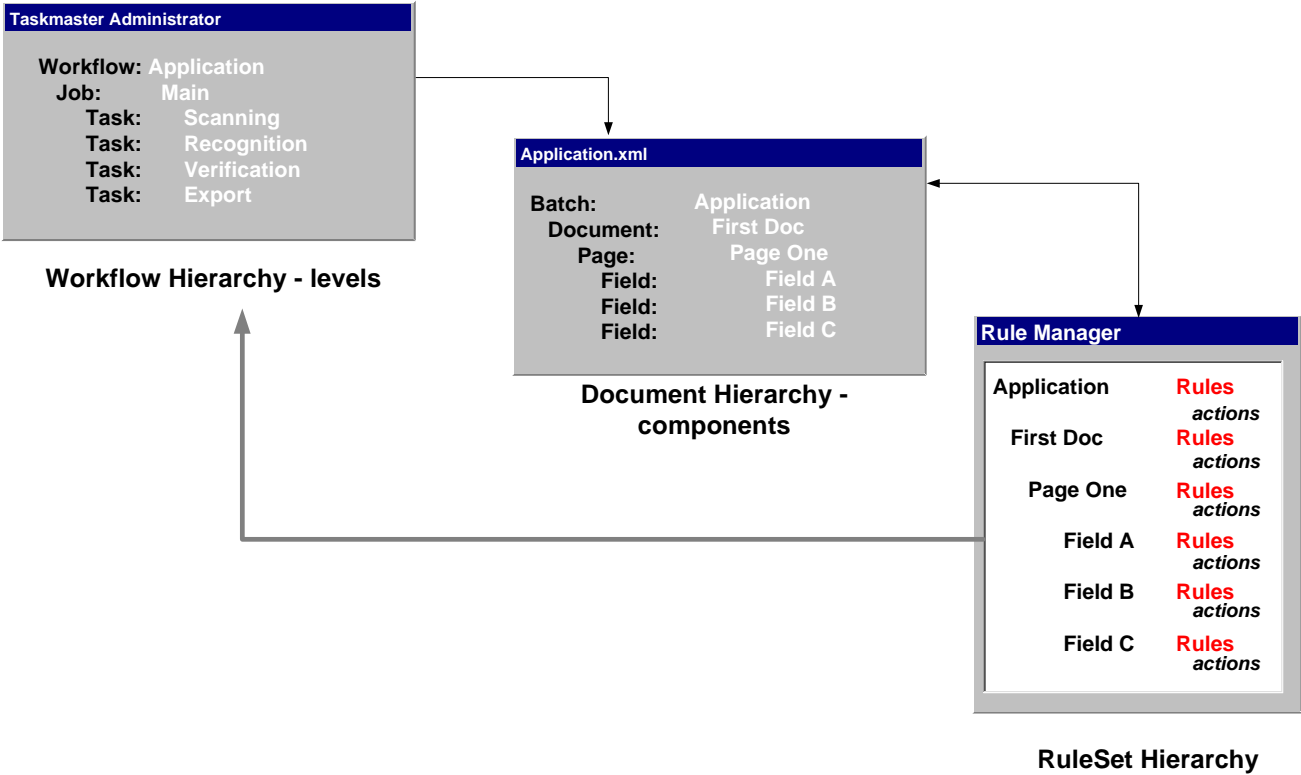

Click here
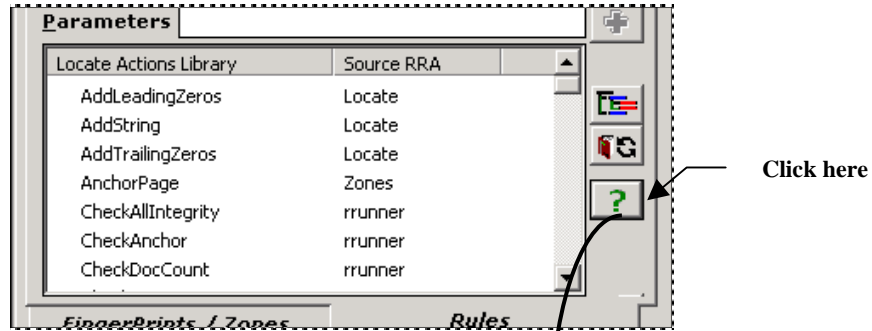
Rule Manager Window – *Rules Panel*
Actions Sector
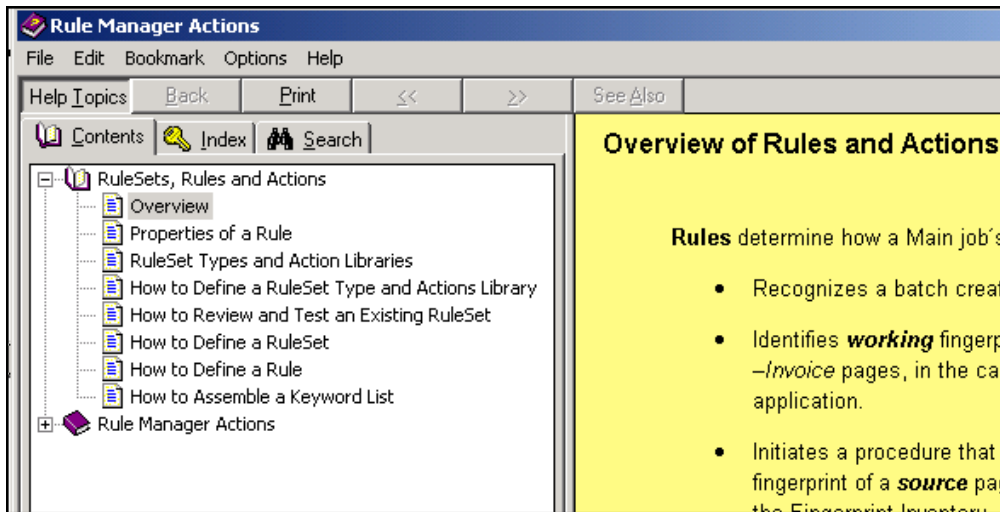
Actions Help

Introduction

The chart below highlights *Rule Manager's* participation in a design trio responsible for the definition and processing of an application's ***rules-based*** tasks.

Taskmaster Administrator	
Workflow: Application	
Job: Main	
Task: Scanning	
Task: Recognition	
Task: Verification	
Task: Export	

Workflow Hierarchy - levels

Application.xml	
Batch: Application	
Document: First Doc	
Page: Page One	
Field: Field A	
Field: Field B	
Field: Field C	

Document Hierarchy - components

| Rule Manager	
Application	**Rules** *actions*
First Doc	**Rules** *actions*
Page One	**Rules** *actions*
Field A	**Rules** *actions*
Field B	**Rules** *actions*
Field C	**Rules** *actions*

RuleSet Hierarchy

On the left, you ask *Taskmaster* to set up a **Workflow Hierarchy** consisting of a standard **workflow**, a Main **job**, and **tasks** in four core categories: Scanning, Recognition, Verification and Export.

The **Document Hierarchy** in the center is an essential property of the Workflow Hierarchy's **workflow**. The Document Hierarchy is a blueprint that clearly identifies the targets of the workflow's operations, at four levels: **Batch**, **Document**, **Page** and **Field**. The Document Hierarchy also establishes and maintains a set of properties for objects at each level.

Members of the **RuleSet Hierarchy** determine how tasks process batches, documents, pages and fields – and the values the fields contain – in response to rules defined by *Rule Manager*. Each rule consists of one or more actions, and is part of a RuleSet that is bound to an object of the Document Hierarchy.

The illustrations on the next few pages depict actual examples of this design trio – taken from the *Taskmaster for Invoicess* application.
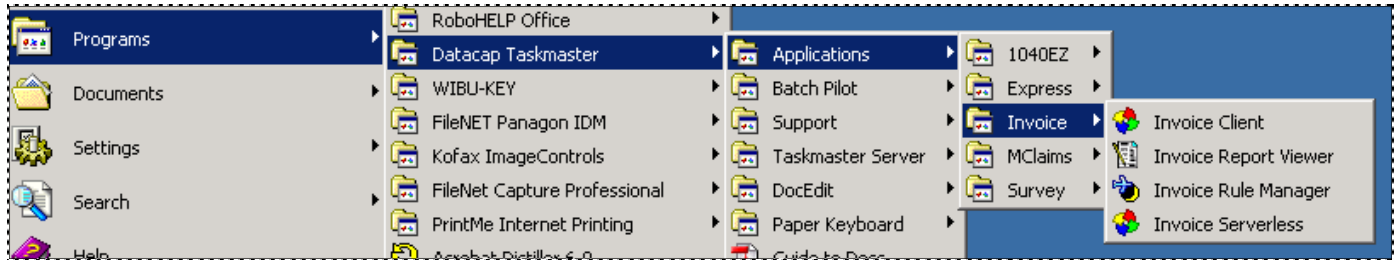
Invoices Workflow

Main Job

RuleRunner Task
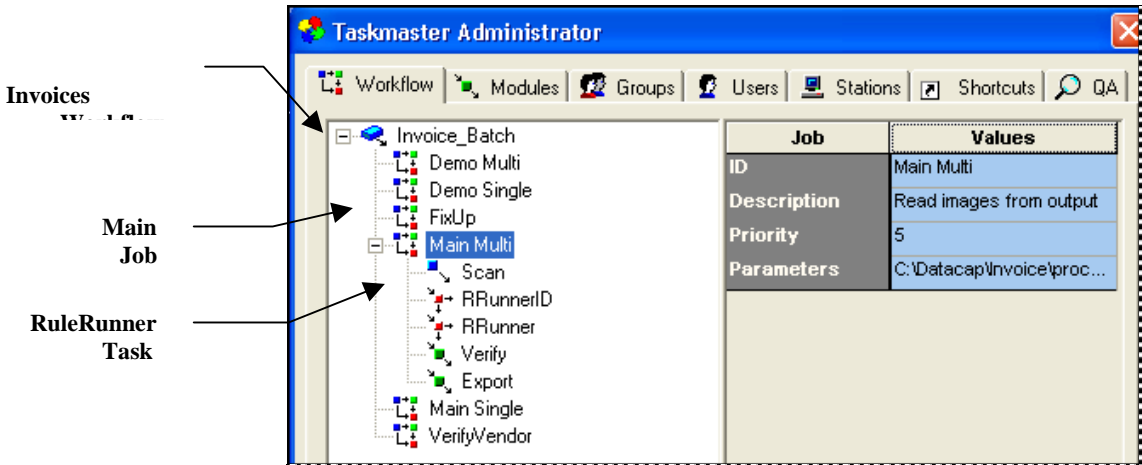
Taskmaster Administrator – *Workflow tab*
Invoices Workflow Hierarchy

Above, the *Workflow* tab of the *Invoices* application's ***Taskmaster Administrator*** lists jobs of the Invoices workflow, and tasks of its Main job.

☛ To access the *Invoices* application - and the features this reference uses for a number of its examples - take the following steps:

Step	Action

1. Confirm that your **Datacap** configuration's Taskmaster Server Service is up and running, and that Taskmaster Client software has been installed and configured. (For details, see the *Datacap Taskmaster Installation and Configuration Guide.)*

2. Click on your Windows Start button and select **Datacap Taskmaster** from the list of **Programs** options.

3. Open the **Applications** folder, and the **Invoice** sub-folder (in this example.)

4. Click on the **Invoice Client** option to open the *Login* dialog. (Note, too, the link to the **Invoice Rule Manager** – for details, see the next page.)
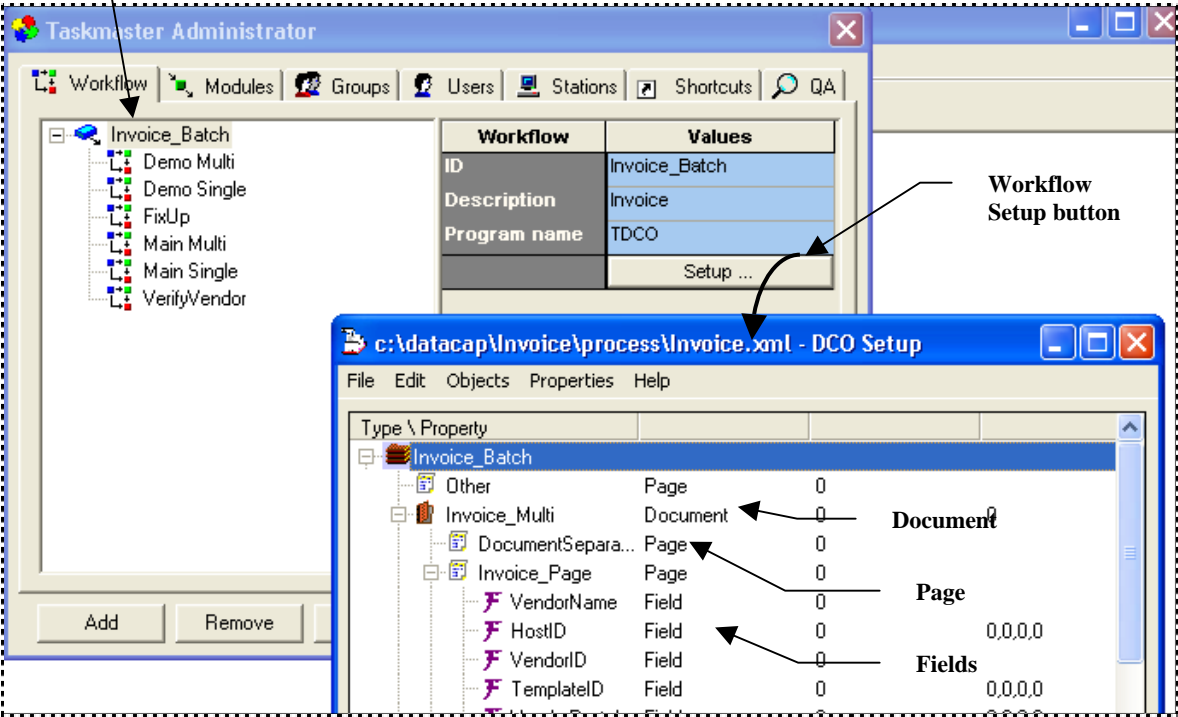

5. Enter your security codes and press the *Login* dialog's OK button to access the *Invoices* application.
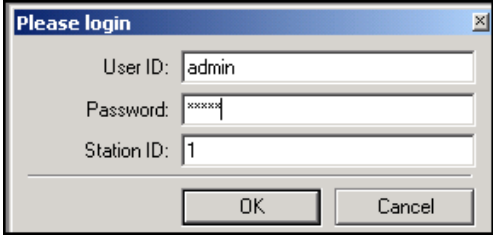
Taskmaster Sign-on dialog

Below, when you highlight a Workflow ID in the *Taskmaster Administrator's* *Workflow* tab and press the Setup button, the **Document Hierarchy Setup** window appears with its list of the Document Hierarchy's objects and their properties.

Invoices Document Hierarchy
Invoices.xml

On the next page, the **Rule Manager Window's** *Fingerprints & Zones* panel uses samples of forms the application processes to construct a series of fingerprints - templates that identify most if not all **Field** objects of the Document Hierarchy's *source* **Page** object. For example, the application's "Candy Apple" fingerprint is a template you can use for practice and experimentation.
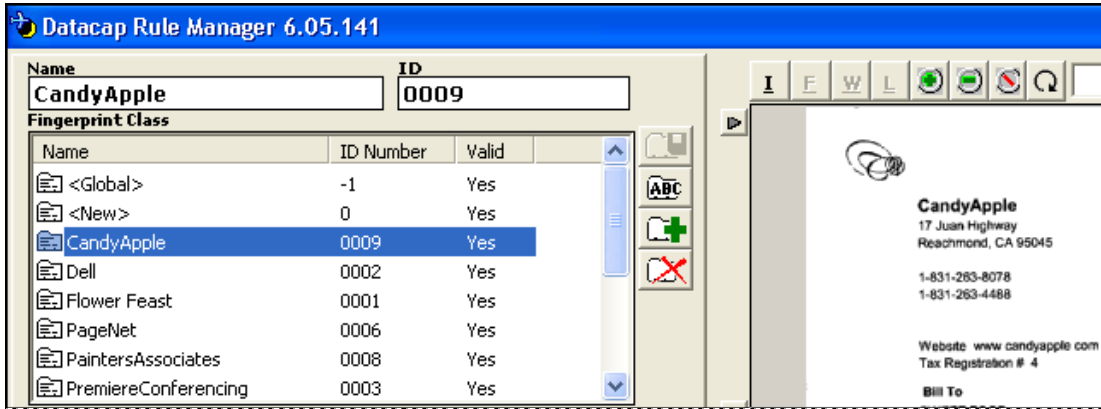
**Rule Manager Window – *Fingerprints & Zones panel*
Invoices Application**

☛ To access the *Invoices* application's *Rule Manager* - and its **Rule Manager Window** -
take these steps:

Step	Action
1.	Click on your Windows Start button and select **Datacap Client** from the list of **Programs** options.
2.	Open the **Applications** folder, and the **Invoices** sub-folder.
3.	Click on the *Invoices Rule Manager* option to access the *Fingerprints & Zones* panel of the **Rule Manager Window**.

The following page depicts a portion of the **Rule Manager Window's** *Rules* panel.

✓ Chapter 3 of the *Rule Manager Reference* describes all elements of both panels of the
Rule Manager Window.
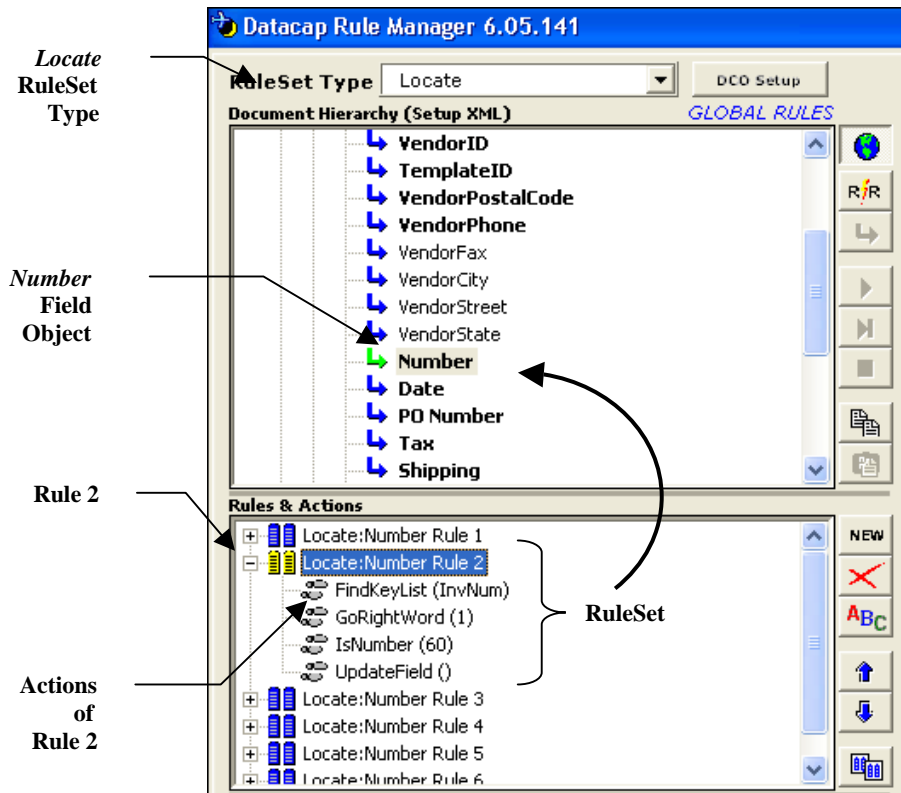
Rule Manager Window – *Rules panel*
***Locate* RuleSet: *Shipping* Field Object**

The *Rules* panel of the ***Rule Manager Window*** defines RuleSets and their rules. The RuleSets determine how tasks are to treat objects of the Document Hierarchy, beginning with the **Batch** object.

The illustration above depicts a portion of the **Locate** RuleSet used by the RuleRunner task to find a Shipping amount on a page, and add the value to the page's Data file.

The second **Locate** rule is made up of four actions:

FindKeyList(Shipping) searches the page for a "keyword" in the file that holds the *InvNum* keyword list. If this action is successful…

GoRightWord(1) moves the task's attention one "word" to the right of the keyword, on the same line. If there is a word in that location…

IsNumber(60) checks to be sure that at least 60% of the word's characters are *numeric*. If the word meets this condition…

UpdateField() adds the word's value to the page's Data file.

✓ If any action of Rule 2 fails, RuleRunner immediately initiates the actions of Rule 2.
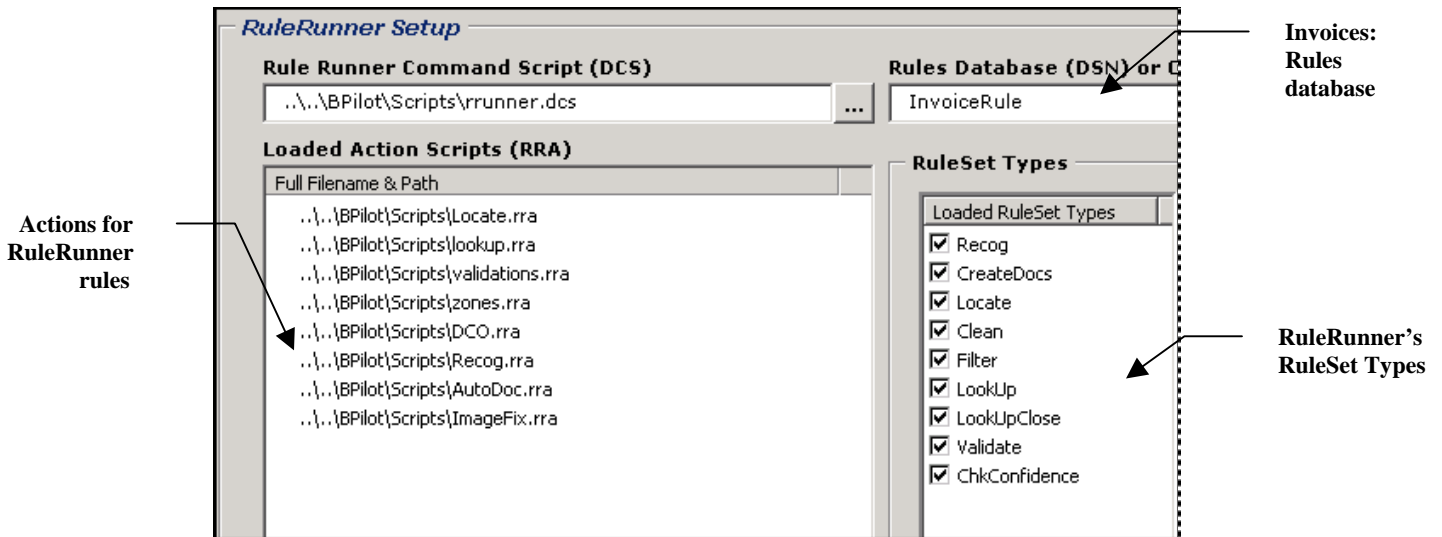
Task Setup – *RuleRunner Task*

A *RuleRunner* task applies rules you assemble in the *Rules* panel of the ***Rule Manager Window*.** The Setup phase of the Task Definition process assigns rules of one or more RuleSet Types to the task, and lists the order in which they are to be carried out.

In the illustration above, the task will begin by applying rules of the **Recog** RuleSet Type and end by applying **ChkConfidence** rules.

☞ *Important!* This *Rule Manager Reference* concentrates on the configuration of *Rule Manager* and the tools of the ***Rule Manager Window***. The *Rule Manager Reference* also describes and provides examples of every action (Chapter 4).

If you need additional "how to" information about the ***Rule Manager Window***, refer to the *Guide to Taskmaster Rules* and its explanations of the steps you take to:

♦ Use the ***Document Hierarchy Setup*** window as you put together your application's Document Hierarchy (Chapter 3).

♦ Define and use fingerprints (Chapter 4).

♦ Assemble RuleSet Types, RuleSets and rules (Chapter 5).

♦ Define *RuleRunner* tasks (Chapters 7-11).

Typographic and Terminology Conventions

This book uses the following typographic and terminology conventions.

Convention:	Example:
Menu names are in **Bold** type.	From the **View** menu…
Menu commands are in **Bold** type.	From the **View** menu, select the **Operations** command.
Panel and tab names are in *Italics*.	The *Rules* panel of the ***Rule Manager Window.***
Dialog names are in ***BoldItalic*** type.	Specifications in the ***Rule Manager Setup*** dialog determine the content of your ***Rule Manager Window.***
Window names are in ***BoldItalic*** type.	The ***Rule Manager Window*** defines fingerprints and rules.
Field names are in **Bold** type.	Enter a Security Code in the **Password** field.
Object *types* within a Document Hierarchy are in **Bold** type; object *names* are in *Italics*.	*Number* is a **Field** object of the *Express* application's Document Hierarchy.
Button names are in Regular type.	Click on the OK button.
Drop-down list items are in *Italic* type.	The *ImageFix* module is an option in the **Task Module** drop-down list.
Datacap product and application names are in *Italic* type.	*Taskmaster*, *Taskmaster Web* and *Rule Manager* are Datacap products. *Invoices*, *1040EZ* and *Express* are applications.

If You Need Help

Here is the number for Datacap's technical support:

☎ **914-259-1300**

Please note that if you need to **fax** Datacap technical support, the fax number is:

☎ **914-366-0500**

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

✉ **support@datacap.com**

About this Book

The *Rule Manager Reference* has the following chapters.

Chapter 1: Welcome

Chapter 1 introduces you to *Rule Manager* and to this text.

Chapter 2: Setup

This chapter shows you how to configure *Rule Manager* and your ***Rule Manager Window.*** It also examines the purpose and content – and access to - the **Rules** database that is an essential aspect of *Rule Manager.*

Chapter 3: Rule Manager Window

Chapter 3 describes the features and settings of the ***Rule Manager Window,*** and the attributes and operation of the window's *Fingerprints & Zones* and *Rules* panels.

Chapter 4: Actions

Chapter 4 is a complete guide to all *Rule Manager* actions. The chapter includes an Actions List sorted alphabetically and by type.

Glossary

The Glossary defines key *Rule Manager* terms.

Index

This is an alphabetical listing of topics covered by the *Rule Manager Reference.*