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## Rule Manager Setup

*Rule Manager* is the point-and-click development environment in which you assemble your application's structure; produce the fingerprints that replicate the format of a *source* page and designate its fields; and define the rules that determine how tasks will construct the documents in a batch – and recognizes, verifies, validates and exports the values of the fields on a page.

Setup procedures configure *Rule Manager* for a single application. The *Rule Managers* of pre-configured applications such as *Taskmaster for Invoices* and the *1040EZ* training application are already in place, and available for investigation and experimentation: This chapter shows you how to review the Setup specifications of these and other pre-configured applications.

Chapter 2 also examines the steps you take to set up a *Rule Manager* for your application.

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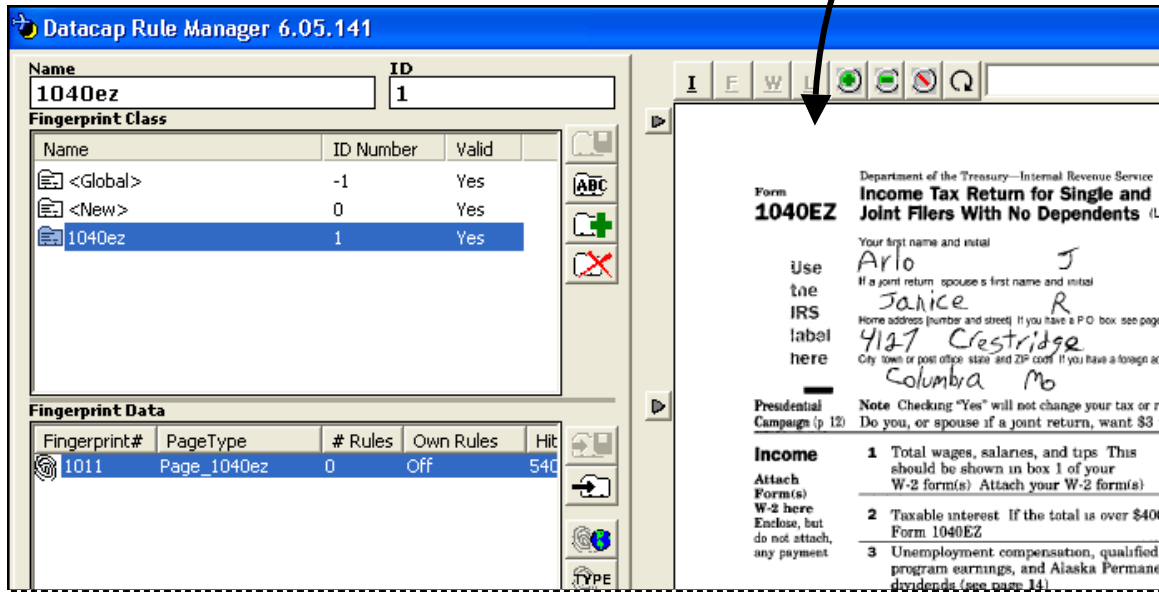
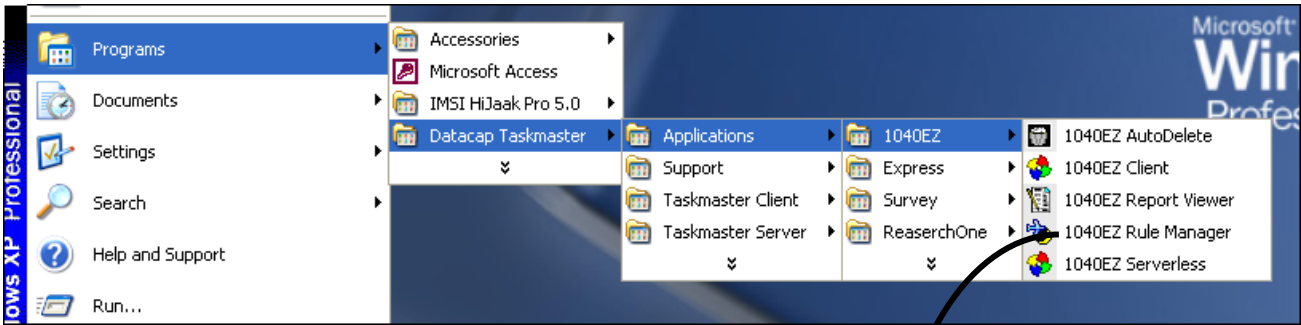
## Introduction

When you access an application's *Rule Manager*, the *Fingerprints & Zones* panel of the *Rule Manager Window* usually appears on your screen.

- ✓ As an example, you can take the steps below to open the *1040EZ* application's *Rule Manager* – and its *Rule Manager Window*. (*Don't worry!* The *1040EZ* application is indestructible, and encourages your participation.)

Step	Action
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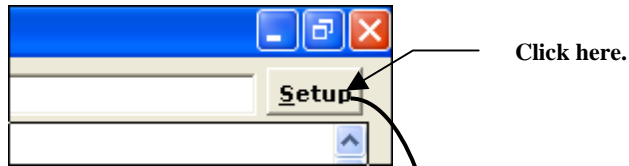
1. Open your Windows Start button's **Programs** listings.
2. Select **Applications** from the **Datacap Taskmaster** options.
3. Select **1040EZ** and **1040EZ Rule Manager**.



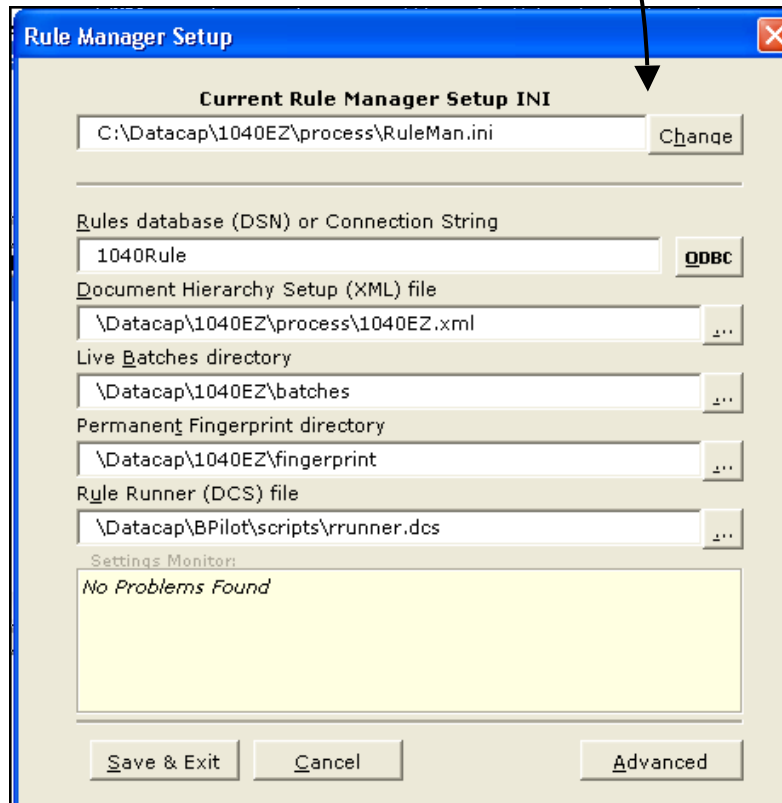
1040EZ Rule Manager Window – Fingerprints & Zones panel

Chapter 3 examines the many features and functions of this window.

To begin your exploration of *Rule Manager* setup procedures, click on the Setup button in the upper right-hand corner to open the *Rule Manager Setup* dialog.



1040EZ Rule Manager –  
Fingerprints & Zones Panel



1040EZ Rule Manager – Setup Dialog

Page 9 describes the settings in this dialog; subsequent sections of Chapter 2 review the composition of an application’s Rule Manager Setup file (Page 10) and Rules database.

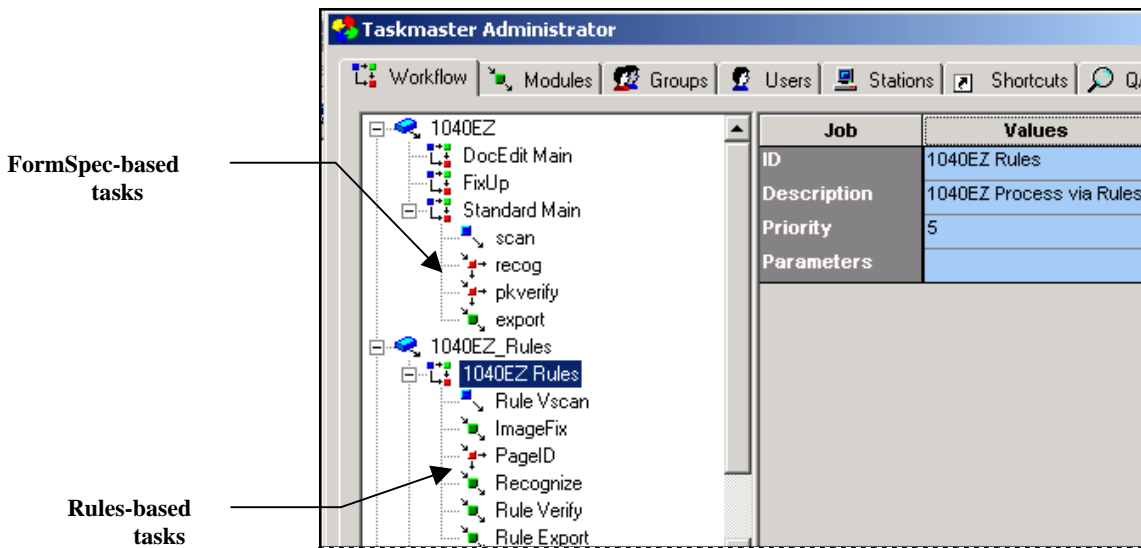
- ✓ *Rule Managers* for pre-configured applications such as *Taskmaster for Invoices* and *1040EZ* are already in place, and their Setup specifications are easy to review. But what about an application that does not yet have a *Rule Manager*...what if it’s your application?

## How to Add a Rule Manager to an Application

Some *Taskmaster* applications – those run by *Taskmaster 5.0 and before* – employ tasks that process documents in response to the properties and scripts of a **FormSpec** at two levels: form and field.

*Taskmaster 6* applications define and run tasks that respond to **rules** applied to objects of a Document Hierarchy at four levels: **Batch, Document, Page** and **Field**.

The unusual portrayal of the *1040EZ* training application below includes both types, to illustrate differences between an application operating in the FormSpec mode and in the Document Hierarchy mode. Page 6 shows you how to convert an application’s FormSpec to a Document Hierarchy.



1040EZ Taskmaster Administrator – Workflow tab

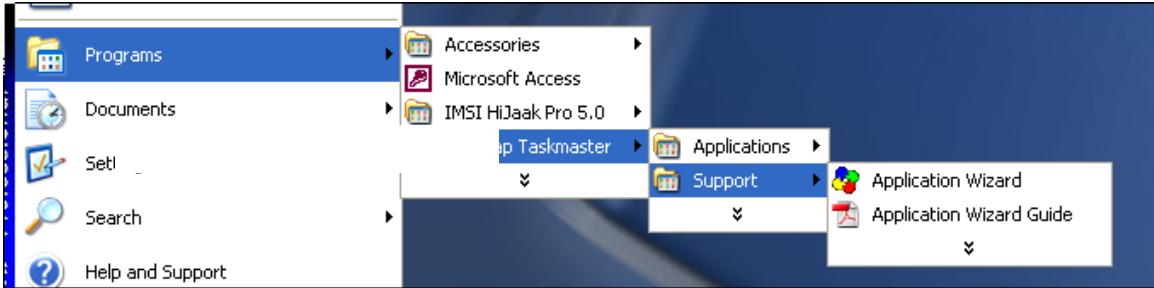
The properties of the *1040EZ\_Rules* workflow in the illustration above must include a formally defined Document Hierarchy, with objects that are the targets of rules composed within *Rule Manager*.

There are two ways to add *Rule Manager* capabilities to an application:

- **New Application.** This approach uses the Taskmaster Application Wizard to set up a new application, along with a *Rule Manager* with a complete set of default specifications.
- **Existing Application – new Rule Manager.** To add *Rule Manager* to your current application, you can copy essential configuration files from an application such as *Invoices*, place them in your application’s **Process** directory, and update their settings. You can then insert the desktop shortcut that will open *Rule Manager*.

## New Applications

When you press your Windows Start button and select **Datacap Taskmaster** from the **Programs** options, the list of options in the **Support** folder includes the **Application Wizard**:



If you select this item, the Taskmaster Application Wizard gives you a chance to create a completely new *Taskmaster 6.5* application. Alternatively, you can use the wizard to “copy” an existing application..

- ✓ The *Application Wizard Guide* describes the wizard features and procedures, and carefully reviews settings of the new application’s *Rule Manager*.
- ✎ Chapter 2 of the *Guide to Taskmaster Rules* fully describes the contents of all folders of a new application’s directory – **MQSW**, in the example below. However, there are files in the **Process** and **Template** folder with a special relevance to *Rule Manager* and its configuration:

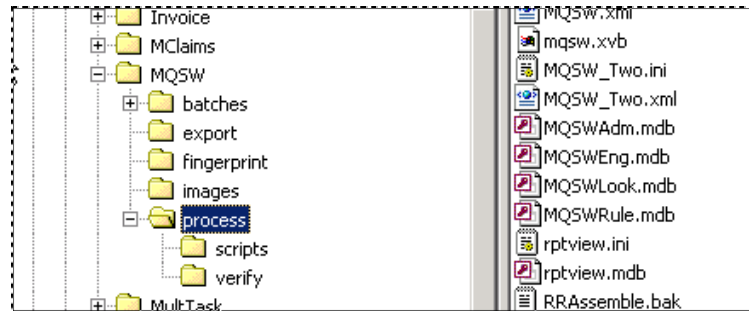
**MQSW.xml** contains the application’s Document Hierarchy (Chapter 1).

**MQSWRule.mdb** is the *Rule Manager* database that retains details of the fingerprints, rules and actions you compose.

**RuleMan.ini** is a Settings file with specifications exclusively for *Rule Manager*.

**Alert!** Be sure to acquaint yourself with this file and its contents.

The **fingerprint** folder contains the fingerprints you assemble (Chapter 3.)



**Process Directory – MQSW Application**

- ☛ *Rule Manager* will be ready to run as soon as you complete the definition of a Document Hierarchy (**MQSW.xml**, in the illustration on the previous page) and update the **RuleMan.ini** file with values applicable to your application.



**Important!** The Taskmaster Application Wizard automatically adds a *Rule Manager* shortcut icon that you can add to your desktop.

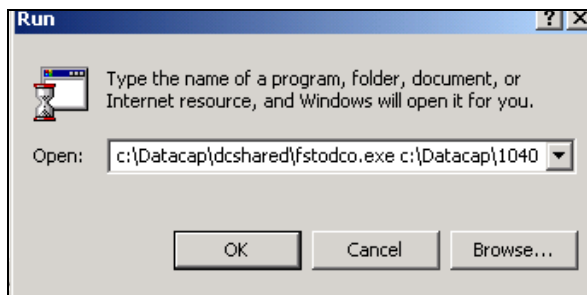
### Converting a FormSpec to a Document Hierarchy (Taskmaster 5.0 and Earlier)

A **Document Hierarchy** is a *required* property of the new workflow for a *Taskmaster 6*, and is an .xml file that resides in the application's **Process** directory.

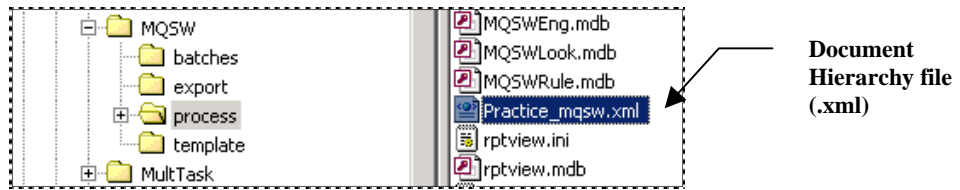
- ✓ Most tasks of a **FormSpec-based** application (*Taskmaster 5.0* and before) respond to the specifications of a **FormSpec** when they process a batch and its contents. These specifications are part of a FormSpec file(.fs) in an application's **Process** directory. However, you can convert your application's FormSpec to a comparable Document Hierarchy (.xml) by taking the steps outlined below.

### How to Convert a FormSpec (.fs) to a Document Hierarchy (.xml)

Step	Action
1.	Locate the FormSpec file (.fs) that is to be converted. Decide on the name and location of the new Document Hierarchy (.xml). The location of <i>both</i> files should be in your application's <b>Process</b> directory.
2.	Click on your Windows Start button and select the <b>Run</b> option.



- | Step | Action  |
|------|---|
| 3.   | Locate the FormSpec file (.fs) that is to be converted. Decide on the name and in the <b>Open</b> field, enter a value something like this, using a UNC path ( <b>bold</b> type is for emphasis): |
|      | <code>c:\Datacap\dcshared\fstodco.exe c:\Datacap\1040ez\process\1040ez.fs c:\Datacap\MQSW\process\Practice_mqsw.xml</code>  |
| 3.   | Press the OK button to carry out the conversion.  |
| 4.   | Check the contents of the target directory to be sure the new Document Hierarchy is in place.   |

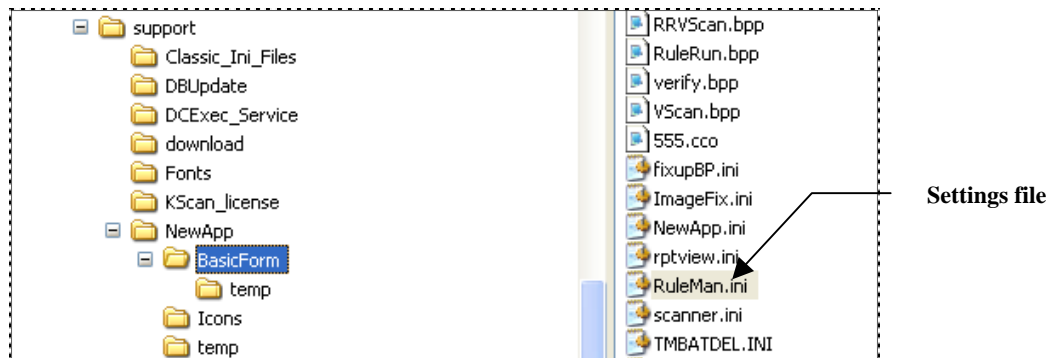


- ✓ This procedure assigns FormSpec properties to components of the Document Hierarchy. After a close investigation, you may decide to remove certain of these properties and add others. Chapter 3 of the *Guide to Taskmaster Rules* thoroughly examines the structure of the Document Hierarchy and the use of the *Document Hierarchy Setup* window.

### Obtaining Other Rule Manager Files

*Rule Manager* also needs a Settings file (**RuleMan.ini**) and a Rules database for your application.

To get started, you can copy the Settings file from the **BasicForm** sub-folder of the **Support** directory's sub the **Datacap** directory:

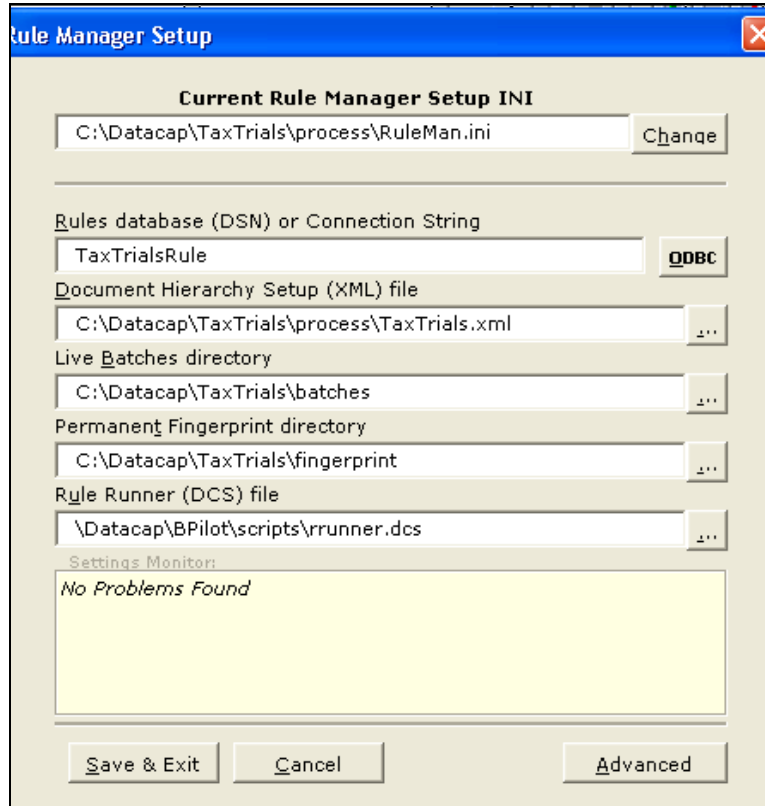


This sub-folder also has prototypes of the Rules and Lookup databases: **TMLook.mdb** and **TMRule.mdb**.

## Introduction

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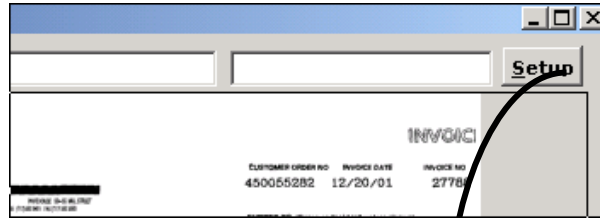
In the illustration below, the Taskmaster Application Wizard produced a brand new, fully-formed application with these *Rule Manager* settings:



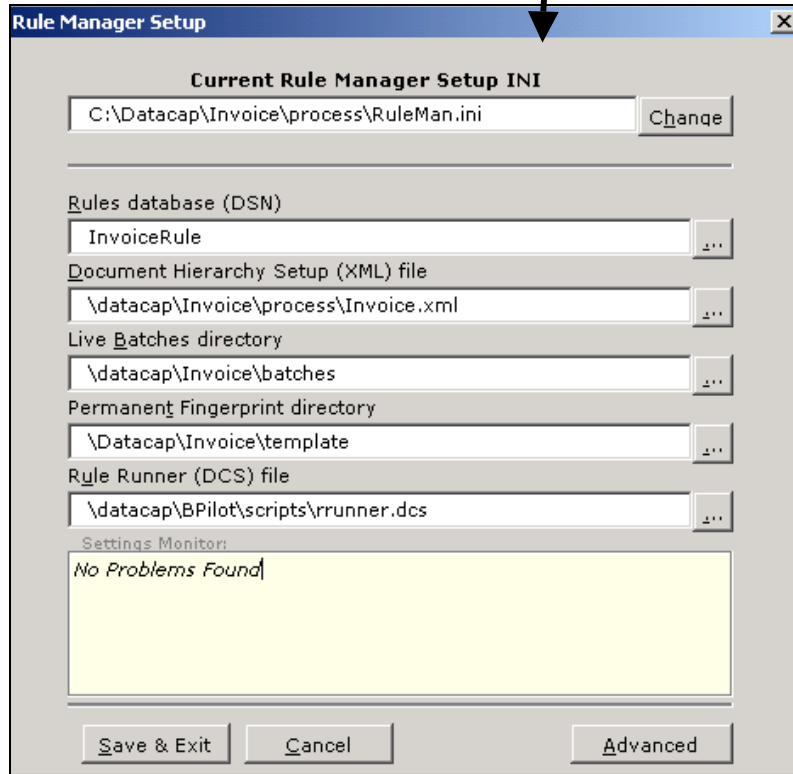


## Rule Manager Configuration

Initially, when you click on your desktop's *Rule Manager* shortcut (Page 6), the *Fingerprints* panel of a default *Rule Manager Window* will appear on your screen. Click on the Setup button to access the *Rule Manager Setup* dialog:



Invoice Rule Manager – Fingerprints Panel



Invoice Rule Manager – Setup Dialog

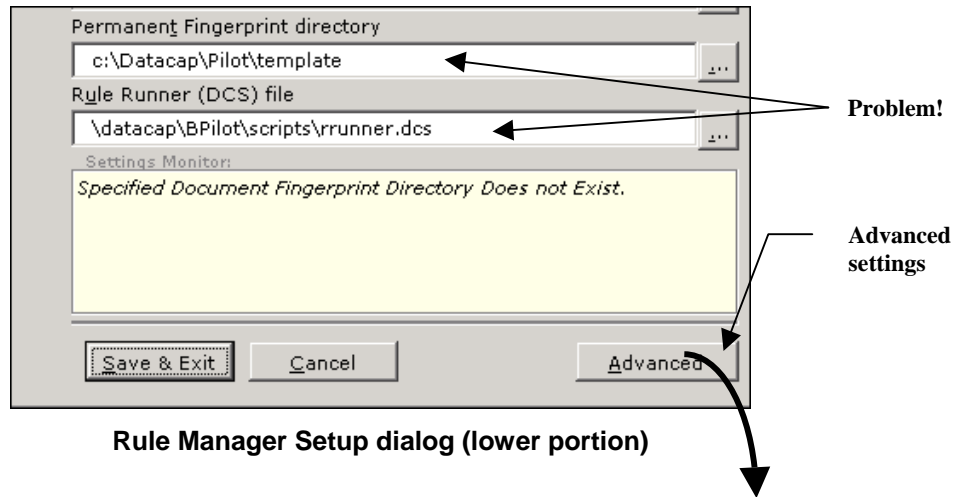
### Rule Manager Setup Dialog

The table below describes the fields and features of the *Rule Manager Setup* dialog.

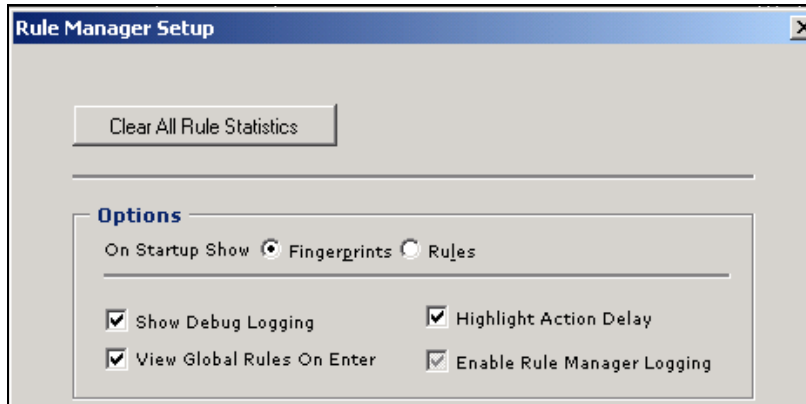
Field/Feature	Description
Current Rule Manager Setup INI	<p>Identifies the Settings file for an application's <i>Rule Manager</i>.</p> <p>Because this file includes a complete set of configuration specifications, using the Change button to designate the Settings file of another application instantly and appropriately transforms <i>Rule Manager</i> and updates the <i>Rule Manager Setup</i> dialog.</p> <p>Be sure to click on the Save &amp; Exit button at the bottom to retain the new <i>Rule Manager</i>.</p>
Change button	<p>Accesses the <i>Select Rule Manager Setup File</i> dialog.</p> <p>You can use this dialog to designate an alternative Settings file.</p>
Rules Database (DSN)	<p>The ODBC <b>Data Source Name</b> of the database which contains details of the application's rules and actions – <i>or</i> a Connection String that links Rule Manager to its Rules database. (<b>Important!</b> For a complete listing of Connection String syntax for Microsoft Access, SQL Server and Oracle databases, see Appendix A of the <i>Taskmaster Administrator's Guide</i>.)</p>
Document Hierarchy Setup file (.xml)	<p>The file containing components of the application's Document Hierarchy, their properties, and the values assigned to those properties.</p> <p>For a full explanation of a Document Hierarchy, see Chapter 3 of the <i>Guide to Taskmaster Rules</i>.</p>
Batch directory	<p>The name and pathway of the directory that contains the batches of the application's workflow.</p> <p>This directory is the source of the documents and pages you use to test new and existing rules.</p>
Permanent Fingerprint directory	<p>The name and pathway of the directory which holds the application's fingerprints.</p> <p>This directory also includes the Global Template's files (see the previous page.)</p>

Rule Manager Setup Dialog (continued)

Field/Feature	Description
Rule Runner Script (DCS)	The name and location of the Datacap script responsible for the operations of <i>rules-based</i> tasks.  <i>Alert!</i> Be sure to consult with your Datacap Implementation Specialist before changing this specification.
Settings Monitor	A helpful messenger which lets you know if a setting is incorrect (illustrated below.)
OK button	Saves the values of the Settings file and closes the <i>Rule Manager Setup</i> dialog.
Cancel button	Closes the <i>Rule Manager Setup</i> dialog without saving changes or additions.
Advanced button	Accesses this <i>Rule Manager's Advanced</i> settings (below and on the next page.)



Rule Manager Setup dialog (lower portion)



Rule Manager Setup dialog – Advanced Settings

### Rule Manager Setup – Advanced Settings

The table below explains *Rule Manager's Advanced Settings*.

Setting	Description
Clear All Rule Statistics button	Clears the RulesStats table of the Rules database.  The value in the Rules Database (DSN) field of the Setup dialog identifies the database.
Clear All Rule Statistics button	Clears the RulesStats table of the Rules database.  The value in the Rules Database (DSN) field of the Setup dialog identifies the database
<b>Options</b>	
On Startup Show Fingerprints or Rules	Radio buttons that determine if the <i>Fingerprints &amp; Zones</i> panel of the <b>Rule Manager Window</b> will appear when you access <i>Rule Manager</i> – or the <i>Rules</i> panel.  You <i>must</i> select one or the other.
Show Debug Logging	If selected, displays by default a full <i>Rules</i> log that tracks the application of rules and their actions, and records any errors.
View Global Rules on Enter	If selected, highlights components to which the Global Rules of each RuleSet apply.  If you do <i>not</i> select this option, <i>Rule Manager</i> lists the <i>custom</i> rules which apply to individual components of the Document Hierarchy.
Highlight Action Delay	If selected, lists the actions of a rule slowly, action-by-action, when you are debugging the rule (Chapter 3).  If you do <i>not</i> select this option, <i>Rule Manager</i> scrolls rapidly through the actions.
Enable Rule Manager Logging	Permits logging of <i>Rule Manager</i> activities.
Close button	Returns you to the <b>Rule Manager Setup</b> dialog.

- ✓ **Remember:** The Taskmaster Application Wizard takes care of many of your *Rule Manager* setup steps. See the *Application Wizard Guide* for complete explanations.