Brainware for Transcripts

Installation Guide

22.1

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About Brainware for Transcripts

Brainware for Transcripts (BFT) captures information from transcripts fields such as school name, student name, birth-date, GPA, and grades and stores the information as a transcript document.

The document is then available to use with your institution's student information system and can be shared among different departments. You can also store additional documents with a transcript, such as a letter of recommendation.

Brainware for Transcripts supports high school and college transcripts, as well as Navy, Marine Corps, Army, and Joint Services transcripts. You can also pre-define documents using standardized auto-index values in order to minimize errors in the automated classification process.

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Installation Process

You can install Brainware for Transcripts with the Brainware for Transcripts installer or manually. It is recommended that you use the installer.

Install Brainware for Transcripts with the Brainware for Transcripts Installer

You can use the BFT installer to install Brainware for Transcripts.

About the Brainware for Transcripts Installer

The Brainware for Transcripts installer installs Brainware for Transcripts (BFT) 22.1* on a server with Brainware Intelligent Capture Foundation EP2* or higher running on it.

Note:

- Brainware for Transcripts has adopted a new version structure. Brainware for Transcripts 22.1 is the latest release following Brainware for Transcripts 2.4.
- To configure and use CTE in Brainware for Transcripts 22.1, you need to install the Brainware Foundation EP2 CTE Add-on Build 6021, in addition to the Brainware Intelligent Capture Foundation EP2.
- The Brainware Intelligent Capture license must include the Chain Table Extraction (CTE) engine as an available licensed engine for Brainware to utilize. In cases where an installation already exists, the license must be updated to include Chain Table Extraction (CTE) engine.
- To use Brainware for Transcripts 22.1, the WinWrap script engine needs to be reverted to WinWrap 9. For more information, see https://support.hyland.com/r/Brainware/Brainware-Intelligent-Capture/Foundation-23.1/Brainware-Intelligent-Capture-Update/Upgrade-to-Brainware-Intelligent-Capture-Foundation-23.1/Upgrade-from-Version-5.3-or-Later/Switching-Between-WinWrap-Versions-9-and-10 in the Brainware Intelligent Capture Update Guide.

The installer automates the following:

- Creation of project directory structure and copying of Brainware for Transcripts related files.
- Creation of BFT configuration database.
- Creation of BFT reporting database.
- Creation of BFT specific registry values.
- Creation of Run Time Server instances.

Note: The installer is available for new installations only and does not support upgrading from a previous version of BFT at this time. If you need to upgrade or install on an earlier version of Brainware Intelligent Capture, refer to the Upgrade Procedure for Brainware for Transcripts section in this guide. The BFT installer uses the RSA3072 encryption methodology. To use the RSA1024 encryption method, you need to configure this setting in the project INI file after the installation is complete. For more information, refer to the Encrypt a password topic in the Brainware for Transcripts User Guide

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Software Prerequisites

Brainware Intelligent Capture

The Brainware for Transcripts installer requires Brainware Intelligent Capture Foundation EP2 or higher and must be executed on a server with Intelligent Capture Runtime Server. Refer to the BIC Installation Guide for installation instructions.

Note: If Brainware Intelligent Capture is configured using an encrypted password, you must provide the unencrypted version of the same password during the installation of BFT. You will not be able to bypass the encrypted password by selecting windows authentication. The user ID and password details can be found in the DstHost.exe.config file.

Microsoft .NET Framework 4.6

Brainware For Transcripts needs .NET Framework 4.6 to run. Prior to executing the installer, it must be ensured that the server has .NET Framework 4.6 installed.

Installation and Setup Process

The following steps are a high-level overview of the procedures that you need to perform to install Brainware for Transcripts using the installer.

1. Run the Brainware_Transcripts_Solution.exe as administrator.
2. Read and acknowledge the warning message prior to installation.
3. Read and accept the End User License Agreement.
4. Select an installation directory and project file name.
5. Select a database creation option.
6. Define the configuration database connection string.
7. Define the reporting database connection string.
8. Define the Runtime Service instance configurations.
9. Complete the installation.

Run the Installation Wizard

The Brainware for Transcripts Installer is currently usable for new installations only and does not support an upgrade. It supports Uninstall of the current version, however a newer version of the installer should not be used to uninstall a previous version of BFT.

The Brainware for Transcripts installer must be run as an administrator. When you run the installer, it checks for an existing installation of BFT. If it finds any existence of BFT, it throws a warning

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message. You must acknowledge the warning message, abort the installation and manually uninstall BFT before continuing with the installer.

If you use the installer for upgrading an existing application, it may cause the files to get deleted or corrupted. You can use the Add/Remove Programs available in the Windows Control Panel to uninstall an existing version of BFT.

To run the installer, complete the following steps.

1. Run the **Brainware_Transcripts_Solution.exe** as administrator.

   Note: The BFT installer displays a warning message that you need to acknowledge before you can continue.

2. Select the **I understand and want to continue the installation** check box to acknowledge the warning and click **Next**.
3. Read and accept the End User License Agreement.

Define an Installation Directory

The **Install Directory** screen allows you to define the installation directory for the Brainware for Transcripts project. This path can be local to the server or a UNC path; however, the user running the installer must have access rights to this directory.

The installer validates that the target installation directory entered by the user is empty. If any file(s) is found, a warning message is displayed, enabling the user to either:

- Change the directory entered or selected
- Remove the file(s) present in the directory
- Abort the installation

Additionally, you can define the Brainware for Transcripts project file's name. During installation, the following three directories are created within the defined installation directory.

- Import - The Runtime Server Instance for Import is configured to poll this directory for incoming documents.
- Global - The project, INI, sample CSVs, and Train directory are copied to this location. The project and INI files are then renamed to the defined Project file name.
- Export - The Runtime Server Instance for Export is configured to export documents to this directory.

Create a Database

On the **Database Creation** screen, you can choose to have the installer create the configuration and reporting databases automatically or manually. If you choose manual installation of the databases, the location of the required database scripts is displayed on the screen.

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Define Database Connections

On the **Database Connection** screens, you must define the database connection string to the Brainware for Transcripts configuration database and then the Brainware for Transcripts Reporting database.

If you chose to have the installer create the database, you must also define the database name. BFT Installer supports the latest OLE DB provider (Microsoft OLE DB Driver for SQL Server) for TLS 1.2. compliant SQL Server.

To define database connections, complete the following steps.

1. Click the **Change** button within the **Database Connection** screens. A dialog appears and allows you to easily build the connection string by selecting the OLEDB provider, server name, and authentication method. You can also test the connection from this dialog.

   Note: If your workstation, where BFT installer is running, is TLS 1.2 compliant, you need to select the latest OLE DB provider (Microsoft OLE DB Driver for SQL Server) from the drop-down list in order to continue configuring the database connections. The latest provider will be available in the drop-down list only if it is installed in your workstation.

2. If database tables exist, a warning message is displayed. Click **OK** to acknowledge the warning and then do any of the following:
   - Manually remove the existing database tables, or select a new database, and click **Next** to continue the installation.
   - Click **Cancel** to go back to change your connection string.
   - Abort the installation.

   Note: The BFT Installer cannot be used to overwrite an existing database. If you need to upgrade from an earlier Brainware for Transcripts version or install on an earlier version of Brainware Intelligent Capture, refer to the Upgrade Procedure for Brainware for Transcripts section in this guide.

Runtime Servers

During installation, the installer creates one RTS instance for Import and one RTS instance for Export. On the **Runtime Servers** screen, you can specify:

- Number of OCR, Classification, and Extraction (OCE) RTS Instances. By default, this number is the number of available cores on the server-1 for processing most documents as quickly as possible; however, this number can be lowered, if needed.
- Limit Batch Size - This option allows you to limit the number of documents imported into a Brainware Intelligent Capture batch. The Import RTS instance is configured to poll for sub-directories and any sub-directory with more than this number of files is split into multiple batches based on the number defined. The default setting is 10 documents.
- Clean Up Batch Time Limit (hours) - The Export instance is automatically configured by the installer to perform clean-up of old batches. You can define the amount of time which must pass after successful export of the batch before clean-up of the batch is executed and the batch is deleted. The default setting is 240 hours.
- Job Name - You can define the Database Job name where the RTS instances are performing their work. This value defaults to the Project file name defined on the **Installation Directory** screen.

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- Auto System Update Time - The Import instance is automatically configured by the installer to perform updates to the Associative Search Engine pools every 24 hours. You can define the time when this update should occur. The default is 12:00 AM local server time.

During the installation, the Runtime Manager service is restarted.

Complete the Installation

You can review your options prior to executing the installation and then complete your installation.

To view the installation summary and finish installation, complete the following steps.

1. Review a summary of the installation options you have selected on the **Summary** screen.
2. Use the **Previous** button to make changes to any of your selections.
3. Click **Install** once you have reviewed and are satisfied with your configuration.
4. A progress bar displays the progress of the installation. Upon completion, the **Completed the Brainware for Transcripts Setup Wizard** screen is displayed.
5. Click **Finish** to exit.

Uninstall Brainware for Transcripts

You can uninstall Brainware for Transcripts via **Add/Remove Programs** in Windows Control Panel only.

If an installation of Brainware for Transcripts already exists, the installer throws a warning, asking the user to perform a manual uninstallation by following the instructions mentioned in the Manual Installation section of this guide. Click **Exit** to cancel the installation.

Any database installed with Brainware for Transcripts is not removed via the uninstall process. Once uninstallation has completed, click **Finish** to exit the wizard.

Manual Installation

This section describes how you can install Brainware for Transcripts, manually

The following steps outline the high-level procedures that you need to perform to install and configure Brainware for Transcripts.

- Create Brainware for Transcripts folder structure.
- Create the pool directory.
- Run the database creation script
- Install Brainware for Transcripts project file.
- Install the Transcript Table Extraction engine.
- Install Solution Configuration Manager.
- Configure the INI file.
- Set up business rules relating to predefined data fields and document types.
- Configure and activate the Dynamic Verifier Form.
- Set up users.
- Set up processing instructions.
- Set up review states.

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- Create a connection to Brainware Visibility.

This guide covers the installation procedure only. For information on how to configure BFT, refer to the BFT User Guide.

About preparing to install Brainware for Transcripts

Before you install Brainware for Transcripts, verify that you have completed the following.

- You have installed Brainware Intelligent Capture Foundation EP2 or higher
- To configure and use CTE in Brainware for Transcripts 22.1, you need to install the Brainware Foundation EP2 CTE Add-on Build 6021, in addition to the Brainware Intelligent Capture Foundation EP2.
- You have obtained and installed a Brainware Intelligent Capture license file. This file must be placed in the <InstallDir>\Components\Cairo directory.

  Note: To configure and use CTE, the Brainware Intelligent Capture license must include the Chain Table Extraction (CTE) engine as an available licensed engine for Brainware to utilize. In cases where an installation already exists, the license must be updated to include Chain Table Extraction (CTE) engine.
- You have obtained the Brainware for Transcripts installation files.

Download the installation files

To obtain the Brainware for Transcripts installation files, contact the Hyland Software Technical Support group. For a list of Technical Support contact numbers, go to hyland.com/pswtscontact.

Create the Brainware for Transcripts folder structure

The first step in installing Brainware for Transcripts is to create the underlying folder structure within Windows Explorer. To create the folder structure, complete the following steps.

1. 1. Create a folder directory on the hard drive, for example `C:\BrainwareProjects\BFT`.
2. Within this directory, create four folders and name them as follows.
   - Import
   - Batch
   - Global
   - Export

Create the Pool directory

The pool directory stores the internal representation of the applicant and institution master data, which is accessed by the system at runtime when the document applicant and institution are being determined. To create the pool directory, complete the following step.

- In the **Global** directory, create a new directory and name it **Pool**.

About the database configuration table creation script

Prerequisite: You need to create a BFT database before configuring BFT tables.

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It is recommended that the Brainware for Transcripts tables should exist in their own database. To create the Brainware for Transcripts configuration tables, you need to run the MasterBFT.sql script for SQL and Oracle servers.

Create configuration tables for SQL

The **MasterBFT.sql** script is included in the Brainware for Transcripts installation package and can be found in the **DatabaseScripts\SqlServer** sub-directory. You need to configure the script before running it. To configure the database table script, complete the following steps.

1. In the **Configuration** section, set the value for the *@DB_Name* variable parameter to the database catalog that will contain the BFT configuration tables.

   Note: Incase the database catalog does not exist, the script will create a database catalog only if the *@DO_CREATE* variable parameter is set to **1**. Otherwise, the script will stop with a message, **Database not found**.

2. Set the value for the *SCRIPT_MODE* variable parameter to **CREATE**.
3. Set the value for the *OVERWRITE* variable parameter to **0**.

   Note: This prevents the existing database table from being overwritten.

4. Run the **MasterBFT.sql** script.

Create configuration tables for Oracle

Prerequisite: A user workspace is available for the BFT configuration database tables.

The **MasterBFT.sql** script is included in the Brainware for Transcripts installation package and can be found in the **DatabaseScripts\Oracle** sub-directory. You need to configure the script before running it. To configure the database table script, complete the following steps.

1. In the **Configuration** section, set the value for the *SCRIPT_MODE* variable parameter to **CREATE**.
2. Set the value for the *OVERWRITE* variable parameter to **0**.

   Note: This prevents the existing database table from being overwritten.

3. Run the **MasterBFT.sql** script.

Install Brainware for Transcripts project files

To install the Brainware for Transcripts project files, complete the following steps.

1. Navigate to the Global directory you created.
2. Copy the following files from the installation directory to the Global directory.
   - The **SDP** file.
   - All contents of the **Train** directory.
   - The **INI** file.
3. Rename the **SPD** and **INI** files to something appropriate for your institution. The SPD and INI files should have the same name, but ensure that you retain the .sdp and .ini file extensions. For example, stateuniversity.sdp and stateuniversity.ini.

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Solution Configuration Manager - Tasks To Do

The Brainware for Transcripts solution configuration is managed via the Solution Configuration Manager (SCM). SCM is a web-based tool that provides an interface for an administrator to configure and maintain the solution configuration. You can also use it for change management control as changes are migrated between development, test and production environments.

SCM requires the installation of the corresponding BFT SCM package. You must ensure that the correct SCM package for BFT (in this case, version 22.1*) is installed. You need to ensure this, regardless of whether you are installing SCM for the first time or if you are upgrading BFT.

Note: Brainware for Transcripts has adopted a new version structure. Brainware for Transcripts 22.1 is the latest release following Brainware for Transcripts 2.4.

Once the software is installed, you need to organize and configure the project. For information on how to configure your project, refer to the Brainware for Transcripts User Guide.

Configure the INI file

The final step to completing the project installation is to perform a basic configuration of the project.ini file. This is the INI file configuration for the installation of Brainware for Transcripts. There are other parameters in the INI file that you need to configure after you have finished the installation. For more information on how to configure additional parameters of the INI file, refer to the BFT User Guide.

To perform a basic configuration of the INI file, complete the following steps.

1. Navigate to the **Global** directory where the Brainware for Transcripts project file is installed.
2. Open the **project.ini** file.
3. Configure the connection string to the BFT database.
4. Configure the settings. For more information, refer to the BFT User Guide.

Setting	Explanation of usage
GRL_VL_ProjectName	This column represents the name of the project, which is recorded in the Visibility reporting database. It is customary to set this value to the name of the end user. For example, GRL_VL_ProjectName=Brainware.
GRL_VL_Version (Optional)	This is the version number of the project, which is recorded in the Visibility reporting database. This can be set to 1, but can be left blank or changed to assign document records to different testing cycles.
GRL_VL_ClientName (Optional)	This is the default client name that is recorded in the Visibility reporting database for each document that is processed. As it is superseded by settings in the **Client Settings** page in SCM, it is not mandatory to populate this value.
GRL_OP_ReadSettingsFromDB	This controls whether the project reads configuration settings from the database created in the previous step. Set this to Yes.

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Setting	Explanation of usage
GRL_VL_SQLConnectionGroup	This is the reference to the SQL connection group in the SQL section of the INI file, which contains the connection string to the project database. Set this to 01.
GRL_OP_BatchInDatabase	This specifies whether the Intelligent Capture document batches are held in the Paerceptive_Database database or if they are held as a batch root in the file system. It is recommended that document batches are always held in the database. Set this setting to Yes.
GRL_VL_BatchSQL Connection Group	This is the reference to the SQL connection group in the SQL section of the INI file that contains the connection string to the main Brainware_Database database. Set this to 02.
SQL_VL_01_ConnectionString	Set this to the connection string for the Brainware for Transcripts database. For example, SQL_VL_01_ConnectionString=Provider=SQLOLEDB.1;Password=secret;Persist Security Info=True;User ID=sa;Initial Catalog=ICT;Data Source=W2008-JOHNSMITH\sqlexpress
SQL_VL_02_ConnectionString	Set this to the connection string for the main Brainware_Database database. For example, SQL_VL_02_ConnectionString=Provider=SQLOLEDB.1;Password=secret;Persist Security Info=True;User ID=sa;Initial Catalog= Brainware_Database;Data Source=W2008-JOHNSMITH\sqlexpress

5. Save and close the INI file.

Configure dialog box settings for the Verifier Thin Client

If you are deploying the Verifier Thin Client, then the web.config file needs to be updated so that the optional dialog boxes and information and are activated within the Verifier interface.

To configure the web.config file, complete the following steps.

1. Navigate to **<InstallDir>\Brainware\Brainware Intelligent Capture Web Server**.
2. Open the **web.config** file.
3. Set the following parameters to `True`.

```
<mouseClicked enabled="True"/>
<tabPressed enabled="True"/>
```

4. Save and close the file.

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Upgrade Procedure for Brainware for Transcripts

This section provides high-level information on how to upgrade from an older version of Brainware for Transcripts to the current version of BFT in SQL as well as Oracle environments.

Database upgrade for SQL

Prerequisite: As per SOW or QA recommendations, download the latest versions of the following onto the customer server/environment.

- Brainware Intelligent Capture
- Brainware for Transcripts (BFT)

The **MasterBFT.sql** script is included in the Brainware for Transcripts installation package and can be found in the **DatabaseScripts\SqlServer** sub-directory. You need to configure the script before running it. To upgrade the database SQL, complete the following steps.

1. Backup the Project files (sdp) and Train folder(s) in the environment. If unsure of project locations or count, open each instance and note each project path and filename.
2. Stop all services and make sure all users are logged out.
3. Take a backup of the Brainware for Transcripts Configuration Database.
4. In the **Configuration** section, set the value for the *@DB_Name* variable parameter to the database catalog that will contain the BFT configuration tables.
5. Set the value for the *SCRIPT_MODE* variable parameter to **UPDATE**.
6. Run the **MasterBFT.sql** script.

Database upgrade for Oracle

Prerequisite: As per SOW or QA recommendations, download the latest versions of the following onto the customer server/environment.

- Brainware Intelligent Capture
- Brainware for Transcripts (BFT)

The **MasterBFT.sql** script is included in the Brainware for Transcripts installation package and can be found in the **DatabaseScripts\Oracle** sub-directory. You need to configure the script before running it. To upgrade the database Oracle, complete the following steps.

1. Backup the Project files (sdp) and Train folder(s) in the environment. If unsure of project locations or count, open each instance and note each project path and filename.
2. Stop all services and make sure all users are logged out.
3. Take a backup of the Brainware for Transcripts Configuration Database.
4. In the **Configuration** section, set the value for the *SCRIPT_MODE* variable parameter to **UPDATE**.
5. Run the **MasterBFT.sql** script.

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