Perceptive DataTransfer

User Guide

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Introduction

Perceptive DataTransfer is a data matching, review and upload solution that allows you to automatically verify, clean up, and enter data extracted from hand-printed paper forms, downloadable web forms, and almost any other electronic source.

You can quickly and accurately upload information into your database, such as online and paper applications, recruit cards, SAT scores, ACT scores, GRE scores, and AP scores without the risk of creating duplicate student records.

With Perceptive DataTransfer, you can:

- Import a nearly unlimited range of data files.
- Match input data to records in your database.
- Review potentially matching records side-by-side.
- Upload new or modified information in real-time into your database.

You can customize Perceptive DataTransfer to upload any type of data from any information source in the Perceptive DataTransfer source code.

Starting and Logging in to Perceptive DataTransfer

To start and log in to Perceptive DataTransfer, do the following:

1. Start the application by doing one of the following:
    - Open a web browser and type the Perceptive DataTransfer location into the browser address bar. For example, type an address such as http://servername:8080/DataTransfer.
    - On desktop computers, open the Perceptive DataTransfer location by selecting File > Open from the browser menu and provide the location.
    - On desktop computers, double-click the Perceptive DataTransfer shortcut icon, or (in Microsoft Windows) right-click it and click **Open**, or (in Apple Mac and Linux) control-click it and click **Open**.

    By default, there is no shortcut icon. On desktop computers, you can create a desktop shortcut, or, for tablets, phones, and desktop computers, you can bookmark the startup page to access it quickly when you subsequently log in to the application.
2. When you log into Perceptive DataTransfer for the first time, you are prompted to accept the End User License Agreement (EULA). Click **Accept** to accept the agreement. When you accept the agreement for your username, it is also accepted for all other roles to which you belong; if you switch to another Role, you do not have to accept the EULA again. If you click **Decline**, you are redirected to the log in screen.
3. Type your username and password in the Username and Password fields. Your username and password are usually the same as those you use to log in to your administrative system.

    Note: If there are issues starting Perceptive DataTransfer or entering data in the login screen, contact your Perceptive DataTransfer system administrator for assistance in establishing the necessary connection rights and privileges.
4. Click **Log in**.

    If you are logging into a workspace version in Edit mode and another user is logged into that version of the workspace, you receive a prompt that the Edit version is locked by another user.

You are logged in to Perceptive DataTransfer, and the application starts.

You are logged in to Perceptive DataTransfer with your default user role and workspace version in which you are working. Specific product functions and features are available depending on the role you use and on the workspace version in which you are working.

Note: After 25 minutes of inactivity, you are prompted that you will be logged out within five minutes of further inactivity.

Understanding the Desktop and Tablet Interfaces

Perceptive DataTransfer displays the desktop view when you use the application on desktop computers; it displays the tablet view when you use it on tablets and on phones with larger resolutions. The layout differs slightly between the interfaces, and not all features are available for the tablet view.

The Job Dashboard displays all jobs that are configured for Perceptive DataTransfer and allows users to run jobs in batch mode.

The Perceptive DataTransfer toolbar provides access to Perceptive DataTransfer features. Refer to the following table for a description of the toolbar menu options.

Element	Description
Perceptive button	Contains the following options: • Open Admin Guide. Provides access to the administrator guide. • Open User name's Guide. Provides access to the user name guide. • About DataTransfer. Provides information about Perceptive DataTransfer. • Licensing. Provides licensing information
Jobs button	Contains the following options. • Add Job. Allows you to add jobs. • Recurring Jobs. Allows you to add recurring jobs. Refer to Configuring jobs and processing records.
Tools	Coin tans the following options. • Lookup. Allows you to configure the lookup tool • Check Names. Allows you to configure the check names tool. Data Exports. Allows you to configure data exports. • Logs. Allows you to view log messages about jobs. • Import History. Allows you to view details about workspace imports. Refer to Using Perceptive DataTransfer Tools.

Sorting columns

For Perceptive DataTransfer dialog boxes or windows that contain tables of information, you can choose the columns of information you want to view or hide, sort information alphabetically, and resize the width of columns.

To select the columns that are displayed and to sort columns, complete the following steps.

1. In the dialog box, point your mouse to the edge of a column and click .
5. Click **Sort Ascending** to sort information alphabetically in a high to low sequence (A to Z).
6. Click **Sort Descending** to sort information alphabetically in a low to high sequence (Z to A).
7. Click **Columns**.
8. Check the checkbox for the column you want to display.

Resizing columns

To resize the width of a column, point your mouse over the edge of a column until the mouse pointer changes to ; then, drag and drop your mouse to the desired location to resize the column.

Expanding Panes

You can collapse and expand some panes. For panes on the right side of the application, click to collapse the pane and click to expand a collapsed pane; for panes on the left side of the application window, click to collapse the pane and click to expand the pane.

Refreshing information

To refresh information in dialog boxes and application windows, click .

Changing roles

To change roles, perform one of the following actions.

- If you are using the desktop version of DataTransfer, from the **Role** drop-down box, select the Perceptive DataTransfer role you want to use.
- If you are using the mobile version of DataTransfer, select **Settings > Role**, and then select the role you want to use.

Changing Workspace version

To change workspace versions, perform one of the following actions.

- If you are using the desktop version of DataTransfer, from the **Workspace** drop-down box, select the version you want to use.

  When you hover your mouse over a version in the drop-down box, a tooltip appears and displays the version description for the version.

- If you are using the mobile version of DataTransfer, select **Settings > Version**, and then select the version you want to use.

Specifying Preferences

To specify preferences, perform one of the following actions.

- Click **Preferences > Set Default Role** to set the current user's role as the default role. When you log in to Perceptive DataTransfer, you are logged in using this user role.
- Click **Preferences > Set Default Version** to set the workspace version of the current user as the default version. When you log in to Perceptive DataTransfer, you are logged in using this workspace version.
- Click **Preferences > Record Grid Dimensions** to specify the number of rows and columns per page to display for records when you open a job.
- The **Record Grid Dimensions** dialog box appears. In the **Columns Per Page** field, type the number of columns to display; in the **Rows Per Page** field, type the number of rows to display. The default value for each field is 20. The minimum value you can use is 10, and the maximum is 100.
- Click **Preferences > Filename in Job Name** to append the filename of the input file to the name of a job when you add jobs. For more information about jobs, refer to Configuring jobs and processing records.
- Click **Display All Match Results** so that when you run jobs in interactive mode, all possible record matches are compiled before the application pauses to allow you to review the possible matches.
- Typically, for jobs running in interactive mode, each match routine in the associated procedures contains a STOP command that pauses job processing, allowing the user to examine the list of possible matches for that match routine. When you set this preference, the STOP command is skipped, and each match routine will run, adding matches to the list of possible matches. If a match routine finds a possible match that is already in the match list, the routine skips the match; the final match list does not contain any duplicates.
- In addition, the match results also have an associated rank that is displayed in the results panel, in the # column. The rank is set by the STORE command in each match routine and indicates which match routine found the match. The result list is ordered by ranking—the order in which the match routine discovers the matches.
- Click **Verify Before Running Job** to confirm that you want to run a job. When this option is enabled, when you click Run, the Confirm Run dialog box appears and prompts you to confirm that you want to run the job.
- Click **Skip Previous Results** so that the same possible match record is not displayed twice. For example, when you start processing a record, you receive a list of possible matches, one of which is John Doe. If none of the matches is correct, you click the **Get More Results** button and receive the next possible set of matches. However, if the next set of matches contains John Doe again, Perceptive DataTransfer does not display John Doe as a possible match.

Understanding User Roles and Privileges

Your user role and privileges determine what you can do with Perceptive DataTransfer.

The workspace version in which you are working and whether workspaces are shared determine what you can do. For example, you cannot configure objects, such as data exports, if you are working in a workspace version in staged or active mode.

Your administrator configures your role and privileges.

User privileges determine if you can perform the following actions.

- Configure the lookup tool.
- Configure the check name tool.
- View data exports.
- Modify data exports.
- Run data exports.
- Export lookups, check names, data exports, log messages, and reports.
- Import workspace versions.
- Run reports.
- Modify reports.
- Modify scheduled reports.
- View report output.
- Delete report output.
- Work within a workspace version.
    - Work within a version in edit mode.
    - Work within a version in test mode.
    - Work within a version in staged mode.
    - Work within a version in active mode.
    - Work within a version in inactive mode.
- Configure jobs.
    - Create new and recurring jobs.
    - Modify recurring jobs.
    - Enable logging of job messages.
    - Enable job hold status.
    - View archive rules for jobs.
    - Create new records.
    - Create matched records.
    - Suspend records.
- Create notification groups.
- Modify notification groups.
- Work within a specific workspace and with specific workspace objects.
- Configure file sources.

Viewing server logs

You can view a list of server log messages, view the contents of each message, and download messages in either.zip or native format.

1. Select Administration > Server Logs.

   A dialog box appears and displays the following columns of information.

   - File Name: Name of the server log file.
   - Size: Size, in Kb, of the log file.
   - Last Modified: Date and time on which the file was last modified.

2. To view the contents of a file, select the file you want to view. To select multiple files:

   - Click a file and press and hold the Ctrl key as you click each file with your mouse.
   - Click a file and press and hold the Shift key as you click another file to select contiguous files.

   Either right-click the file you want to view and select View or select the file and click . The contents of each file opens in a separate tab.

3. To download the file in ZIP format, select the file you want to download. To select multiple files:

   - Click a file and press and hold the Ctrl key as you click each file with your mouse.
   - Click a file and press and hold the Shift key as you click another file to select contiguous files.

     Right-click the file and select **Download as Zip** or select the file and click ; then, select the location where you want to save the file. When you download multiple files, one ZIP file is created that contains all the log files you selected.

4. To download the file in the application format in which it was authored, select the file you want to download. To select multiple files:

   - Click a file and press and hold the Ctrl key as you click each file with your mouse.
   - Click a file and press and hold the Shift key as you click another file to select contiguous files.

     Right-click the file and select **Download Native** or select the file and click , then, select the location where you want to save the file.

5. To refresh the table of log files, either right-click the table and select **Refresh** or click .

Configure PDF to TIFF Properties

You can configure the properties to use when you use the ImageNowAddDoc or NWAddDoc functions to convert a PDF file to a TIFF file. For more information about these functions, refer to Understanding the ImageNowAddDoc function and Understanding the NWAddDoc function.

To configure properties, complete the following steps.

1. Select **Administration > PDF to TIFF**.

   The Configure PDF to TIFF Properties dialog box appears.

2. In the TIFF DPI field, type the DPI value. Values range from 72 to 720; the default value is 240.

3. From the TIFF Color drop-down box, select the color properties. Options are: Full Color, Gray Scale, and Black & White. The default value is Full Color.
4. From the Compression Type drop-down box, select the compression type. Options are: CCITT_RLE, CCITT_T_4, CCITT_T_6, PACKBITS, JPEG, and LZW. The default value is JPEG.
5. You can click **Reset** to reset all values in the dialog box to use the default values.
6. Click **OK** to save your changes and close the dialog box.

Using Perceptive DataTransfer Tools

Refer to the following topics for more information.

- Configuring Lookup Values
- Configuring Names to Check
- Viewing Log Messages
- Configuring Data Exports
- Viewing the Import History

Configuring Lookup Values

Use the lookup tool to specify the data you want to map from the input file to the database.

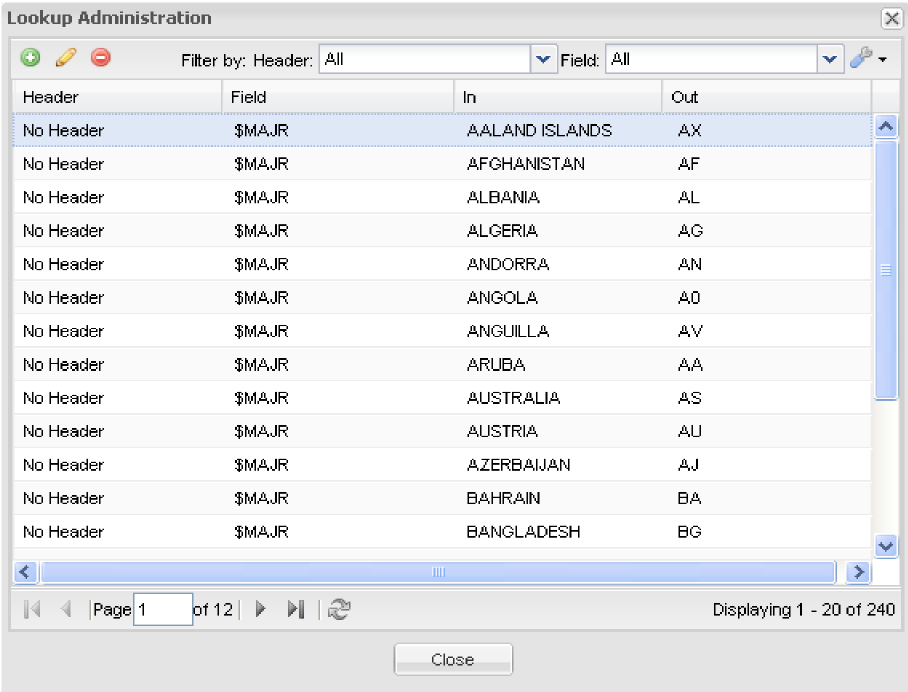
Your Perceptive DataTransfer administrator configures Perceptive DataTransfer to substitute the input value for the output value and store the output value in your database.

For example, an input file may have a value of Humanities for a department; its corresponding database (output) value is HUM. You can use the lookup tool to map Humanities as HUM, and then your Perceptive DataTransfer administrator configures the code to store Humanities as HUM in your database.

You can export lookups to an XML file, and you can import lookups from either a Perceptive DataTransfer XML file or a delimited file.

To open the Lookup Administration dialog box, either select Tools > Lookup or click the Lookup button in the window that appears when you open or edit jobs. When you click the Lookup button, the Lookup Administration dialog box displays the lookup entries for the header that is being used for the job.

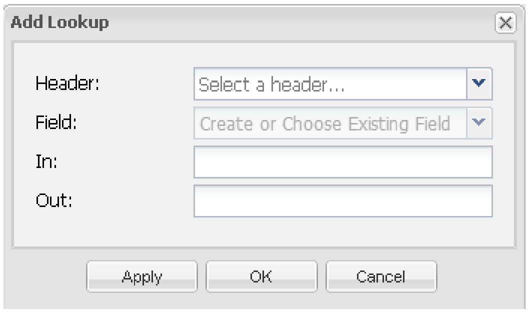
You can filter the entries in the Lookup Administration dialog box by header, by field, or by both. Select the appropriate header from the Header drop-down box to view entries for that header. Select the appropriate field from the Field drop-down box to view entries for that field.



Adding Lookup Entries

To add a lookup entry, complete the following steps.

1. Select Tools > Lookup.
2. In the **Lookup Administration** dialog box, click  .
3. In the **Add Lookup** dialog box, from the Header drop-down box, optionally select the header for which to configure the lookup entry. Select No Header if you want to use this entry for all headers.



4. From the **Field** drop-down box, select the header input variable to use or type the input variable in the **Field** field. This variable corresponds to the field in the input file that you want to map to a database valid code (output).
5. In the **In** field, type the value of the input variable to map to the output value in the **Out** field.
6. In the **Out** field, type the output value to map to the input value (specified in the **In** field).
7. Click **Apply**.
8. Click **OK**.

Modifying Lookup Entries

To modify a lookup entry, complete the following steps.

1. Select **Tools > Lookup**.
2. In the **Lookup Administrator** dialog box, select a lookup entry to modify and either right-click it and select **Edit** or click  .
3. In the **Edit Lookup** dialog box, in the **In** field, type the input value, which is the value of the input variable to map to the database valid code in the **Out** field.
4. In the **Out** field, type the database valid code to map to input value (specified in the **In** field).
5. Click **OK**.

Deleting Lookup Entries

To delete a lookup entry, complete the following steps.

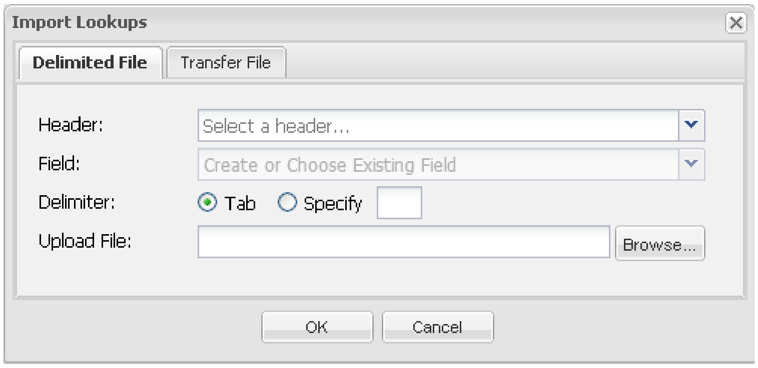
1. Select **Tools > Lookup**.
2. In the **Lookup Administration** dialog box, select a lookup entry to modify and either right-click it and select **Delete** or click  .

Importing Lookup Files

Note: You cannot import lookup files in tablet view.

To import lookup entries from a either a Perceptive DataTransfer file or a delimited file, complete the following steps.

1. Select **Tools > Lookup**.
2. In the **Lookup Administration** dialog box, click  .
3. In the **Import Lookups** dialog box, to import a delimited file, complete the following substeps.



   1. Click the **Delimited** tab.
   2. From the **Header** drop-down box, select the header file to use.
   3. From the **Field** drop-down box, select the header input field or type a new field to create it. This variable corresponds to the field in the input file that you want to map to a database valid code (output).

    4. Specify how the imported file is delimited; either click the **Tab** radio button or click the **Specify** radio button and then provide a value in the Specify field.
    5. In the **Upload File** field, click **Browse** and navigate to the file you want to import.
    6. Click **Upload**.
4. To import a Perceptive DataTransfer file, click the **Transfer File** tab. Then, in the **File** field, click **Browse**, navigate to the file you want to import, and select it.
5. Click **OK**.

The file is imported and imported lookup values display in the Lookup Administration dialog box.

Exporting Lookup Files

To export lookups as an XML file, complete the following steps.

1. Select **Tools > Lookup**.
2. In the **Lookup Administration** dialog box, click .
3. Save the file in the appropriate location.

Configuring Names to Check

You can use the Check Name tool to configure different output values that an input name may have.

For example, for an input name *Alexandria*, you could use *Alex* or *Lexie* as substitutions.

You can import check name values from and export value to an XML file.

- To open the Check Name Administration dialog box, select Tools > Check Names.

Refer to the following topics for more information.

- Adding and Modifying Names
- Deleting Names
- Importing Names
- Exporting Names

Adding and Modifying Names

To add or modify a name, complete the following steps.

1. Select **Tools > Check Names**.
2. In the **Check Name Administration** dialog box, perform one of the following actions.
    - To add a new name, click to display the **Add New Check Name** dialog box.
    - To modify a name, select the name and click to display the **Edit Check Name** dialog box.
3. To add a new value to the name, complete the following substeps.
    1. Click to display the **New Check Name Value** dialog box.
    2. In the **Value** field, type the value that the name can have.

    Note: You cannot add a value that is already configured for another entry. You can only use a value once.

    3. Click **Apply** to add the value to the check name entry.
    4. Continue adding values for the name, and then click **OK**.

4. To modify a value, complete the following substeps.
    1. Select the value you want to modify and either right-click it and select **Edit** or click .
    2. In the **Edit** dialog box, type the value in the dialog box and click **OK**.
5. To delete a value, select the value you want to delete and either right-click it or select **Delete** or click .The value is deleted and is removed from the dialog box.

Deleting Names

To delete a name, complete the following steps.

1. Select **Tools > Check Names**.
2. In the **Check Name Administration** dialog box, select the value you want to delete and either right-click it and select **Delete** or click .
3. Click **Yes** to confirm that you want to delete the name.

The name is deleted, and all its associated values are deleted; the name is removed from the Check Name Administration dialog box.

Importing Names

Note: You cannot import names in tablet view.

To import names from an XML file, complete the following steps.

1. Select **Tools > Check Names**.
2. In the **Check Name Administration** dialog box, click and select **Import**.
3. In the **Import Check Names** dialog box, click **Browse** and navigate to the file you want to import.
4. Click **OK**.

Exporting Names

Note: You cannot export names in table view.

To export names to an XML file, complete the following steps.

1. Select **Tools > Check Names**.
2. In the **Check Name Administration** dialog box, click and select **Export**.
3. Save the XML file in the appropriate location.

Viewing Log Messages

You can view log messages that provide information about Perceptive DataTransfer jobs.

1. Perform one of the following actions.

- In the Job Dashboard, select a job and click the **Log** button.
- In the Job Dashboard, right-click a job and select **Log**.
- In the Job Dashboard, select a job in the table and either right-click it and select **Open** or click the **Open** button, then, in the window that displays, click **Log**.
- Select **Tools > Logs** to display the **Log View** dialog box, which displays the following columns of information.
  - Job Name. Name of the job
  - Type. Type of log message (error, SQL). To log SQL messages, check the Log SQL check box in the **Add Job** dialog box for the appropriate job. Refer to Adding new jobs.
  - Message. Body of the log message.
  - User. Username of the user name who was logged in.
  - Date/Time. Date and time on which the message was logged.

2. To filter messages by job, select the job from the **Job** drop-down box.
3. To filter messages by type, select the type of log message from the **Type** drop-down box.
4. To export messages in XML format, click and then save the file in the appropriate location.
5. To view the suspend reason for suspended records, click the log record that indicates that a record status changed to **Suspended** and click to open the **Detailed Log View** dialog box, which displays the suspend reason.

Configuring Data Exports

You can use data exports to create SQL queries to obtain content from any database configured for Perceptive DataTransfer. You can save the results and export them to a delimited file.

You can share data exports with other workspaces, and you can import data exports from and export data exports to an XML file.

Refer to the following topics for more information.

- Understanding Data Export Icons
- Adding Data Exports
- Configuring and Modifying Data Exports
- Copying Data Exports
- Deleting Data Exports
- Running Data Exports
- Extracting Data Exports
- Removing Sharing on Shared Data Exports
- Rolling Back Data Exports
- Importing Data Exports
- Exporting Data Exports
- Configuring Schedules Data Export Rules

Understanding Data Export Icons

The following table describes data export icons and their descriptions.

Icon	Description
	Data export is shared
	Data export is shared and has been modified.
	Data export is not shared and has been modified.
	Data export has not been modified. If you are working in a workspace version in edit mode, the data export is not shared. If you are working in a workspace version in a mode other than edit mode, this icon is displayed for all data exports. The sharing status is unknown.

Adding Data Exports

To add and configure a data export, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box click  .
3. In **the Add Data Export** dialog box, perform one of the following actions.
    - To add a new data export, complete the following steps.
        1. Click the **Add Data Export** tab.
        2. Type a name in the **Name** field and click **OK**.
    - To add a data export that is shared by anotehr workspace, complete the following steps.
        1. Click the **Add Shared Data Export** tab.
        2. From the **Workspace** drop-down box, select the workspace that share the data export you want to add.
        3. From the **Data Export** drop-down box, select the shared daata export that you want to add.
        4. Cick **OK**.

The data export is added and appears in the Data Export Administration dialog box.,

Configuring and Modifying Data Exports

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, either right-click the data export you want to configure and select **Edit** or click  .
3. In the **Edit Data Export** dialog box, to rename the data export, type the name in the **Name** field.
4. From the **Connection Group** drop-down box, select the connection group to use.
5. From the **Connection** drop-down box, select the database connection to use.

6. In the **Data Extract SQL** field, type the appropriate SQL code for data extract.
7. Define the format of the delimited file that contains the data returned by the query. Click the **Tab** radio button to specify that the file is tab-delimited, or click the **Specify** tab to provide your won value and then type the value in the corresponding field.
8. Check the **Include Date and Time** check box to include the date and time in the name of the data export file.
9. Click **OK**.

Copying Data Exports

To create a duplicate of a data export, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, select the data export you want to copy and click  .

The data export is duplicated, and its copy appears in the Data Export Administration dialog box.

Deleting Data Exports

To delete a data export, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, select the data export you want to delete and either right-click it and select **Delete** or click  .

The data export is deleted and is removed from the Data Export Administration dialog box.

Running Data Exports

To run query and view the data returned from the database, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, select the data export you want to run.
3. Click  .
4. Click  .
5. One of the following actions occurs.
   - If there are issues with the SQL code, a dialog box appears and displays information about the problem.
   - If there are no issues with the SQL code, results of the data export display in the **Results** pane.

Extracting Data Exports

You can run the query you created and export the data returned to a file-delimited format you specified in the Edit Data Export dialog box. Refer to Configuring and Modifying Data Exports.

Note: You cannot extract data exports in table view.

1. Select **Tools > Data Exports > Configure**.

2. In the **Data Exports Administrator** dialog box, select the data export you want to extract and either right-click it and select **Extract** or click .
3. In the **Extract Data Export** dialog box, from the **Connection Group** drop-down box, select the connection group you want to use.
4. From the **Connection** drop-down box, select the connection you want to use.
5. Click **OK**.
6. Save the file with the extracted data in the appropriate location.

Removing Sharing on Shared Data Exports

To remove sharing on data exports that are shared with another workspace, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, select the data export for which you want to remove sharing and click .

Sharing is removed on the data export.

Rolling Back Data Exports

If changes have been made and committed to a data export, you can use a previous version (roll back) of it.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, select the data export you want to roll back and either right-click it and select **Rollback** or click .

   The **Rollback Manager** dialog box appears and provides the following information.

   - **Name**. Name of the data export.
   - **Status**. Status of the data export (current or dated).
   - **Version Date**. Date and time on which the version was created.
   - **Created By**. Username of the user name who created the version.
   - **Comments**. Comments, if any, added by the user name for the version.
3. Select the version that you want to use and click **OK**.

The previous version is loaded.

Importing Data Exports

Note: You cannot import data exports in tablet view.

To import a data export, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, select and select **Import**.

3. In the **Import Data Export** dialog box, click **Browse** to navigate to the location of the file you want to import, and then select it.
4. Check the **Update Existing Entities** check box to update an existing data export, with the same name as the data export you are importing, with the data export you are importing.

   If you do not check this check box, and there is an existing data export with the same name as the data export you are importing, *DUPLIACTE-* is appended to the start of the name of the data export you are importing; the existing data export is not updated. If a data export exists with the name DUPLICATE-<*data_export_name*>, *DUPLICATE(2)-* is appended to the start of the name. The number continues to be incremented so that all data exports have unique names.
5. Click **OK**.

The date export is imported and displays in the Data Export Administration dialog box.

Exporting Data Exports

Note: You cannot export data exports in table view.

To export a data export as an XML file, complete the following steps.

1. Select **Tools > Data Exports > Configure**.
2. In the **Data Exports Administrator** dialog box, click and select **Export**.
3. Save the file in the appropriate location.

Configuring Scheduled Data Export Rules

You can configure Perceptive DataTransfer to run data exports at specified times. You can also view the output of past data exports.

Refer to the following topics for information.

- Adding and Modifying Scheduled Data Exports
- Deleting Scheduled Data Exports
- Viewing the Previous Output of Data Exports

Adding and Modifying Scheduled Data Exports

To add or modify a scheduled data export rule, complete the following steps.

1. Select **Tools > Data Exports > Schedule**.
2. In the **Schedule Data Exports** dialog box, perform one of the following actions.
   - To add a new schedule data export rule, click to display the **Add Scheduled Data Export** dialog box.
   - To modify a scheduled data export rule, select the data export and either right-click it and select **Edit Scheduled Data Export** or click to display the Edit Scheduled Data Export dialog box.
3. In the **Name** field, type the name of the scheduled data export rule.
4. In the **Status** field, click the **Enable** radio button to enable the rule; click **Disable** to disable it.
5. From the **Data Export** drop-down box, select the data export to which to assign the rule.

6. Form the **Connection** drop-down box, select the connection used for the connection group.
7. From the **Start Time** drop-down box, select the connection used for the connection group.
8. From the **Start Time** drop-down box, select the time on which the report is run.
9. In the **Options** pane, click **the Run in Edit Version** check box to run the rule against the edit version of the workspace (the rule is run against the edit version of the data export and connection). If you do not select this check box, the rule is run against the active version of the workspace.
10. In the **Recurrent Pattern** pane, specify when the report recurs.
    - Click the **Once** radio button to run the data export once. After the data export is run, rules for running the data export are disabled.
    - Click the **Daily** radio button to specify that the data export is run daily, and then specify the recurrence frequency.
    - Click the **Weekly** radio button to specify that the data export is urn weekly, and then specify the recurrence frequency.
    - Click the **Monthly** radio button to specify that the data export is run monthly, and then specify the recurrence frequency.
11. Click the **Notification** tab to configure notifications to be sent to recipients when certain data export actions occur. Refer to Configuring Notifications.
12. Click **OK**.

Deleting Scheduled Data Exports

To delete a scheduled data export rule, complete the following steps.

1. Select **Tools > Data Exports > Schedule**.
2. In the **Schedule Data Exports** dialog box, select the rule you want to delete and either right-click it and select **Delete** or click .
3. In the dialog box that displays, click **Yes** to confirm that you want to delete the rule.

Rule is deleted and is removed from the Schedule Data Exports dialog box.

Viewing the Previous Output of Data Exports

To view the previous output of the scheduled data export, perform one of the following actions.

Note: You cannot view data export output in table view.

- Select **Tools > Data Exports > View**.
- Select **Tools > Data Exports > Schedule**.

The **Schedule Data Exports** dialog box displays. Next, select the data export for which you want to view previous results and click .

The **View Data Exports** dialog box appears and displays a table with the following information.

- **Date**. Date on which the date export was created.
- **Name**. Name of the data export.
- **Date Export Rule Name**. Name of the rule that caused the scheduled report to be run.

- **Created By**. Username of the administrator who configured the date export.

You can filter the information in the **View Data Exports** dialog box by selecting the appropriate information in one or more of the following fields.

- **Date Export Rule**. Select the data export rule for which to filter results.
- **Data Exports**. Select the data export for which to filter results. Select All to specify all date exports.
- **Data Range fields**. Click the icon to open a calendar from which you can specify the start and end dates of a date range. You can choose both start and end dates or only a start or end date.

After specifying the filter information, click the Filter button to update the table with the selected criteria.

To view a data export, click . The data export opens in a new tabl or browser window in PDF format.

To permanently delete the date export and record the data export instance, click .

Viewing the Import History

To view the import history, complete the following steps.

1. Select **Tools > Import History**.
2. In the **Import History** dialog box, update the following information.
   - **Name**. Name of the object imported into Perceptive DataTransfer (for example, Workspace or Data Export).
   - **Type**. Type of import (Full Import or Partial Import).
   - **Data Created**. Date and time on which object was imported.
   - **Created By**. Username of the user name who imported the object.
3. To view details about the Perceptive DataTransfer objects that were imported, select the entry in the table and either right-click it and select Import Details or click .

The Import Report dialog box appears and displays information about the objects imported into Perceptive DataTransfer.

Configuring Reports

You can write custom XML reports, which are based on JasperReports and are presented in PDF format. For more information about JasperReports, refer to http://en.wikipedia.org/wiki/JasperReports.

Note: Reports only run against the Perceptive DataTransfer database.

Refer to the following topics for more information.

- Configuring Reports
- Configuring Scheduled Reports

Configuring Reports

In Reports > Configure, you can add, modify, and delete reports; you can also import and export reports. Refer to the following topics for more information.

- Adding and Modifying Reports
- Deleting Reports
- Importing Reports
- Exporting Reports

Adding and Modifying Reports

You can create reports in JasperReports format.

1. Select **Reports > Configure**.
2. In the **Configure Reports** dialog box, perform one of the following actions.
   - To add a new report, click to display the **Add Report** dialog box.
   - To modify a report, select the report and either right-click it and select **Edit Report** or click to display the **Edit Report** dialog box.
3. In the **Report Name** field, type the name of the report.
4. In the **XML** field, type the XML code that generates the report.
5. To add report parameters, complete the following substeps.
   1. In the **Report Parameters** pane, click to display the **New Report Parameter** dialog box.
   2. In the **New Report Parameter**, from the **Parameter** dialog box, select the type of parameter you want to add. The Options are;
      - **Header**
      - **Job**
      - **Start Date**
      - **End Date**
      - **User name**
   3. Click **Apply**.
   4. Continue adding parameters, as appropriate, and click **OK** when you are finished.
   5. To delete a parameter, select the parameter in the **Report Parameters** pane and click .
6. Click **OK** to save your changes and close the dialog box.

Deleting Reports

To delete a report, complete the following steps.

1. Select **Reports > Configure**.
2. In the **Configure Reports** dialog box, select the report you want to delete and either right-click it and select **Delete Report** or click .
3. In the dialog box that displays, click **Yes** to confirm that you want to delete the report.

The report is deleted and is removed from the Configure Reports dialog box.

Importing Reports

To import reports from an XML file, complete the following steps.

1. Select **Reports > Configure**.
2. In the **Configure Reports** dialog box, click and select **Import**.
3. In the **Import Report** dialog box, click **Browse**, navigate to the location of the file, and select it.
4. Click **OK**.

This file is imported, and the imported reports display in the Configure Reports dialog box.

Exporting Reports

To export reports to an XML file, complete the following steps.

1. Select **Reports > Configure**.
2. In the **Configure Reports** dialog box, select the report you want to export.
3. Click and select **Export**.

Save the XML file in the appropriate location.

Configuring Scheduled Reports

In Report > Schedule, you can add and delete reports that are scheduled to run at specified times, and you can modify the schedule for these reports. You can also view reports by clicking (refer to Configuring Scheduled Reports for more information.

Refer to the following topics for more information.

- Adding and Modifying Scheduled Reports
- Deleting Scheduled Reports

Adding and Modifying Scheduled Reports

To add or modify a scheduled report, complete the following steps.

1. Select **Reports > Schedule**.
2. In the **Schedule Reports** dialog box, perform one of the following actions.
    - To add a new report click to display the **Add Scheduled Report** dialog box.
    - To modify a report, select the report and either right-click it and select **Edit Report** or click to display the **Edit Scheduled Report.**
3. Click the **Details** tab.
4. In the **Parameters** pane, provide the appropriate parameters. Options depend on the parameters available for the report. Possible operations are:
    - **Start Date** field. Click to open a calendar from which you select the start date of the report.

- **End Date** field. Click to open a calendar from which you select the end date of the report.
- **Job** field. Type the name of the job for the report.
- **Header** drop-down box. Select the header used for the job.
- **User** drop-down box. Select the user running the job.

5. From the **Start Time** drop-down box, select the time on which the report is run.
6. In the **Recurrence Pattern** pane, specify when the report recurs.
   - Click the **Once** radio button to run the report once. After the report is run, rules for running the job are disabled.
   - Click the **Daily** radio button to specify that the report is run daily, and then specify the recurrence frequency.
   - Click the **Weekly** radio button to specify that the report is run weekly, and then specify the recurrence frequency.
   - Click the **Monthly** radio button to specify that the report is run monthly, and then specify the recurrence frequency.
7. Click the **Notifications** tab to configure notifications to be sent to recipients when certain reports actions occur. Refer to Configuring Notifications.
8. Click **OK**.

Deleting Scheduled Reports

To delete a scheduled report, complete the following steps.

1. Select **Reports > Schedule**.
2. In the **Schedule Report** dialog box, select the scheduled report you want to delete and click .

The scheduled report is deleted and is removed from the Schedule Report dialog box.

Viewing Reports

You can view reports in the View Reports dialog box.

Note: You cannot view reports in tablet view.

If you open the dialog box from **Reports > View**, the search filters display the current date for all report rules and reports. If you open it from the Schedule Reports dialog box, the filters display the selected report rule.

These reports, in PDF format, are stored physically on the Perceptive DataTransfer server. You must specify the root directory of the location where the reports are stored. To do so, in the datatransfer.properties file, you must supply a *report_root* parameter. For example:

```
report_root=c:/reports
```

The PDF files are then stored in the appropriate subdirectories within that root directory.

To view a report, complete the following steps.

1. Perform one of the following actions.
   - Select **Reports > View**.

- Select **Reports > Schedule** and click .

  The dialog box displays a table with the following information.

  - **Date**. Date on which the report was created.
  - **Name**. Name of the report.
  - **Report Rule Name**. Name of the rule that caused the scheduled report to be run.
  - **Created By**. Username of the administrator who configured the report.

2. You can filter the information in the View Reports dialog box by selecting the appropriate information in one or more of the following fields.
   - **Report Rule**. Select the report rule for which to filter results.
   - **Reports**. Select the report for which to filter results. Select *All* to specify all reports.
   - **Date Range** fields. Click the icon to open a calendar from which you can specify the start and end dates of a date range. You can choose both start and end dates or only a start or end date.
3. After specifying the filter information, click the **Filter** button to update the table with the selected criteria.
4. To view a report, click . The report opens in a new tab or browser window in PDF format.
5. To delete the report PDF file and the record of the report instance permanently, click . Reports are removed from the location specified in the report_root parameter in the **datatransfer.properties** file.

Configuring Notifications

You can configure Perceptive DataTransfer to send notifications to users when various activities occur in Perceptive DataTransfer. You can configure notifications for jobs, scheduled reports, and version milestones.

Refer to the following topics for more information.

- Configuring Email Addresses
- Configuring Notification Groups
- Configuring Job Notifications
- Configuring Report Notifications

Configuring Email Addresses

You must have the appropriate permissions to configure the SMTP server form which notifications can be sent, and you must also have the appropriate permissions to configure email addresses for users to which these notifications are sent.

Refer to Configuring Users and Privileges.

To configure system email addresses, complete the following steps.

1. Select **Administration > System Properties > System E-Mail**.

2. In the **Configure System Email** dialog box, in the **Email address** field, type the email address used that sends the system notifications.
3. In the **Host** field, type the hostname of the SMTP server that sends the emails.
4. In the **Port** field, type the port number of the SMTP server.
5. In the **Username** field, type the username of the SMTP server.
6. In the **Password** field, type the password of the SMTP server.
7. Click **OK**.
8. You can assign email addresses to Perceptive DataTransfer users; these are the emails addresses at which users receive emails sent from the SMTP server. To do so, complete the following substeps.

Note The name and email address is updated for all users in the system with this username. For example, if user *GUEST* has multiple roles and therefore multiple instances in the system, the name and email address you configure for one instance of *GUEST* is used for all instances of that user.

    1. Select **Administration > User**.
    2. In the **User Administration** dialog box, in the **Navigation** pane, click the user for which you want to configure email settings.
    3. In the **Name** field, type the name of the user for the email address.
    4. In the Email field, type the name of the email address for the user.
    5. Click **Save**.

Configuring Notification Groups

You can configure notifications for a variety of functions. You can configure notification groups, which contain lists of email recipients (similar to an email distribution list), to which to send these notifications.

You must have the appropriate permissions to add and modify notification groups. Refer to the following topics for more information.

- Adding and Modifying Notification Groups
- Deleting Notification Groups

Adding and Modifying Notification Groups

To add a notification group, do the following.

1. Select **Configuration > Notifications**.
2. In the **Notification Group Configuration** dialog box, complete one of the following options. .
    - To add a new notification group, click to display the **Add Notification Group** dialog box displays.
    - To modify a group, select it and click .
3. In the **Name** field, type the name of the notification group.
4. In the **To** field, provide the email addresses of the recipients of the notifications. Perform one of the following options.
    - Manually type the email addresses in the field, separating recipients by commas.

- Click the **To** button to open the **Select Users** dialog box. Select one or more recipients and click **OK**.

5. In the **CC** field, provide the email addresses of the recipients to which to send copies of the notifications. Perform one of the following options.
   - Manually type the email addresses in the field, separating recipients by commas.
   - Click the **CC** button to open the **Select Users** dialog box. Select one or more recipients and click **OK**.

Deleting Notification Groups

To delete a notification group, do the following.

1. Select **Configuration > Notifications**.
2. Select the group you want to delete and click .

Configuring Job Notifications

You can configure notifications to be sent when a job activity occurs. Refer to the following topics for more information.

- Adding and Modifying Job Notifications
- Deleting Job Notifications

Adding and Modifying Job Notifications

To add a job notification, do the following.

1. In the **Job Dashboard**, perform one of the following options.
   - Select **Jobs > Add Jobs** to display the **Add Job** dialog box. .
   - Select **Jobs > Recurring** Jobs.
2. In the **Recurring Job Administration** dialog box, click the **Notifications** tab.
3. Perform one of the following options.
   - To add a new notification, click to display the **Add Job Notification** dialog box.
   - To modify a notification, select it and click . The **Edit Job Notification** dialog box displays.
4. From the **Action** drop-down box, select the job action that occurs for which a notification is sent. Options are Complete or Processed.

   When a job attains *Processed* or *Complete* status, the appropriate notifications are sent to the provided email addresses.
5. Select the recipients to which to send the notifications. You can either select a configured notification group (refer to Configuring Notification Groups), or you can specify recipients not in a group.
   - To select a notification group, select the appropriate group from the drop-down box. The To and **CC** fields automatically display the recipients configured for the notification group, and you cannot modify these fields.
   - To specify recipients not in a group, do the following.

   1. In the **To** field, provide the email addresses of the recipients of the notifications. Perform one of the following options.
      - Manually type the email addresses in the field, separating recipients by commas.
      - Click the **To** button to open the **Select Users** dialog box. Select one or more recipients and click **OK**.
   2. In the **CC** field, provide the email addresses of the recipients to which to send copies of the notifications. Perform one of the following options.
      - Manually type the email addresses in the field, separating recipients by commas.
      - Click the **CC** button to open the Select Users dialog box. Select one or more recipients and click **OK**.

6. Click **OK**.

Deleting Job Notifications

To delete a job notification, do the following.

1. Select **Jobs > Add Jobs**.
2. In the **Add Job** dialog box, click the **Notifications** tab.
3. Select the notification you want to delete and click .

Configuring Report Notifications

You can configure report notifications when certain report activities occur.

Refer to the following topics for more information.

- Adding and Modifying Report Notifications
- Deleting Report Notifications

Adding and Modifying Report Notifications

1. Select **Reports > Schedule**.
2. In the **Schedule Reports** dialog box, perform one of the following options.
   - To add a new report, click to display the **Add Scheduled Report** dialog box.
   - To modify a report, select the report and either right-click it and select **Edit Report** or click to display the **Edit Scheduled Report** dialog box.
3. Click the **Notifications** tab and perform one of the following options.
   - To add a new notification, click to display the **Add Report Notification** dialog box.
   - To modify a notification, select it and click to display the **Edit Report Notification** dialog box.
4. From the **Action** drop-down box, select the report action that occurs for which a notification is sent. The Option is **Complete**.

   When a report is **Complete**, a notification is sent to the specified recipients, and a PDF version of the report is included as an attachment in the email.

5. Select the recipients to which to send the notifications. You can either select a configured notification group (refer to Configuring Notification Groups), or you can specify recipients not in a group.
    - To select a notification group, select the appropriate group from the drop-down box. The **To** and **CC** fields automatically display the recipients configured for the notification group, and you cannot modify these fields.
    - To specify recipients not in a group, perform one of the following actions.
        1. In the **To** field, provide the email addresses of the recipients of the notifications. Perform one of the following actions.
            - Manually type the email addresses in the field, separating recipients by commas.
            - Click the **To** button to open the **Select Users** dialog box. Select one or more recipients and click **OK**.
        2. In the **CC** field, provide the email addresses of the recipients to which to send copies of the notifications. Perform one of the following actions
            - Manually type the email addresses in the field, separating recipients by commas.
            - Click the **CC** button to open the **Select Users** dialog box. Select one or more recipients and click **OK**.
9. Click **OK**.

Deleting Scheduled Reports

To delete a scheduled report, complete the following steps.

1. Select **Reports > Schedule**.
2. In the **Schedule Report** dialog box, select the scheduled report you want to delete and click  .

The scheduled report is deleted and is removed from the Schedule Report dialog box.

Configuring Users and Privileges

When you configure Perceptive DataTransfer users, you define the structure of the institution and configure privileges for users to enable or disable the features they can use.

Configuring Institutions

Refer to the following topics for more information.

- Configuring Organizations
- Configuring Divisions
- Configuring Departments
- Configuring Roles
- Configuring Users

Configuring Organizations

Refer to these topics for more information:

- Adding Organizations
- Renaming Organizations
- Deleting Organizations

Adding Organizations

To add an organization, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following options.
    - In the desktop view, right-click **Enterprise Hierarchy** and select **Add Organization** from the popup menu.
    - In the tablet view, click  .
3. In the **Add Organization** dialog box, type the name of the organization.
4. Click **OK**. The organization is created and appears in the **Navigation > Enterprise Hierarchy**.
5. Add a division under the organization. Refer to Adding Divisions for more information.

Renaming Organizations

To rename an organization, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the Navigation pane, perform one of the following options.
    - In desktop view, right-click the organization and select **Rename *Organization_Name*** from the popup menu.
    - In the tablet view, select the organization and click .
3. In the **Rename Node** dialog box, type the name of the organization and click **OK**.

Deleting Organizations

Note You can delete only the lowest-level node in the hierarchy tree. For example, if you want to delete a department that has roles and users configured for it, you must first delete all users, and next all roles, before you can delete the department.

To delete an organization, do the following.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the Navigation pane, perform one of the following actions.
    - In desktop view, right-click the organization and select **Delete *Organization_Name*** from the popup menu.
    - In tablet view, select the organization and click  .

      A dialog box appears, prompting you to confirm that you want to delete the organization.
3. Click **Yes** to delete the organization.

The organization is deleted, and it is removed from the Navigation pane.

Configuring Divisions

Refer to the following topic for more information.

- Adding Divisions
- Renaming Divisions
- Deleting Divisions

Adding Divisions

To add a division, do the following.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions.
   - In desktop view, right-click the organization for which you want to add a division and select **Add Division** from the popup menu.
   - In tablet view, select the organization for which you want to add a division and click . The **Add Division dialog** box appears.
3. Type the name of the division (for example, Finance).
4. Click **OK**. The division is created and appears in **Navigation > Enterprise Hierarchy**.
5. Add a department under the division. Refer to Adding Departments for more information.

Renaming Divisions

To rename a division, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions.
   - In the desktop view, right-click the division and select **Rename *Division_Name*** from the popup menu.
   - In tablet view, select the division and click . The **Rename Node** dialog box appears.
3. Type the name of the division.
4. Click **OK**. The division is renamed.

Deleting Divisions

Note: You can delete only the lowest-level node in the hierarchy tree. For example, if you want to delete a department that has roles and users configured for it, you must first delete all users, and next all roles, before you can delete the department.

To delete a division, do the following.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions
   - In desktop view, right-click the division and select **Delete *Division_Name*** from the popup menu.

- In tablet view, click .

  A dialog box appears, prompting you to confirm that you want to delete the division.

3. Click **Yes** to delete the division. The division is deleted, and it is removed from the Navigation pane.

Configuring Departments

Refer to the following topics for more information.

- Adding Departments
- Renaming Departments
- Deleting Departments

Adding Departments

To add a department, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions.
   - In desktop view, right-click the division for which you want to add a department and select **Add Department** from the popup menu.
   - In tablet view, select the division for which you want to add a department and click .
3. Type the name of the department (for example, Accounts Payable).
4. Click **OK**. The department is created and appears in the Navigation pane.
5. You can configure department privileges, which specify the tasks that the department can perform. When you configure privileges at the department level, these privileges are also applied to the users and roles that belong to the department. For more information, refer to Configuring Privileges.
6. Add a role under the department. Refer to Adding Roles for more information.

Renaming Departments

To rename a department, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the Navigation pane, perform one of the following actions.
   - In desktop view, right-click the department and select **Rename *Department_Name*** from the popup menu.
   - In tablet view, select the department and click .

     The **Rename Node** dialog box displays.
3. Type the name of the department.
4. Click **OK**. The department is renamed.

Deleting Departments

Note You can delete only the lowest-level node in the hierarchy tree. For example, if you want to delete a department that has roles and users configured for it, you must first delete all users, and next all roles, before you can delete the department.

To delete a department, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the Navigation pane, perform one of the following actions.
   - In desktop view, right-click the department and select **Delete *Department_Name*** from the popup menu.
   - In tablet view, select the department and click .

   A dialog box appears, prompting you to confirm that you want to delete the department.
3. Click **Yes** to delete the department.

The department is deleted, and it is removed from the Navigation pane.

Configuring Roles

Refer to these topics for more information.

- Adding Roles
- Renaming Roles
- Deleting Roles

Adding Roles

To add a role, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, do one of the following.
   - In desktop view, right-click the department for which you want to add a role and select **Add Department Role** from the popup menu.
   - In tablet view, select the department for which you want to add a role and click .

     The Add Department Roles dialog box appears.
3. Type the name of the role (for example, *Clerk*).
4. Click **OK**. The role is created and appears in **Navigation > Enterprise Hierarchy**.
5. You can configure role privileges, which specify the tasks that the role can perform. When you configure privileges at the role level, these privileges are also applied to the users that belong to the role. For more information, refer to Configuring Privileges.

   Note You can assign permissions for a workspace and workspace permissions at the role level only.
6. Add a user under the role. Refer to Adding Users for more information.

Renaming Roles

To rename a role, complete the following steps.

1. Select **Administration > User.**
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions.
    - In the desktop view, right-click the role and select **Rename *Role_Name*** from the popup menu.
    - In tablet view, select the role and click  .

    The Rename Node dialog box appears.
3. Type the name of the role.
4. Click **OK**.

    The role is renamed.

Deleting Roles

Note: You can delete only the lowest-level node in the hierarchy tree. For example, if you want to delete a department that has roles and users configured for it, you must first delete all users, and next all roles, before you can delete the department.

To delete a role, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions
    - In desktop view, right-click the role and select **Delete *Role_Name*** from the popup menu.
    - In tablet view, select the role and click  .

        A dialog box appears, prompting you to confirm that you want to delete the role.
3. To delete the role, click **Yes**.

    The role is deleted and removed from Navigation > Enterprise Hierarchy.

Configuring Users

Refer to the following topics for more information.

- Adding Users
- Setting Default Roles
- Deleting Users

Adding Users

To add a user, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the Navigation pane, perform one of the following actions.

- In desktop view, right-click the role for which you want to add a user and select **Add User** from the popup menu.
- In tablet view, select the role for which you want to add a user and click  .

  The Add User dialog box appears.

3. Type the name of the user.
4. Click **OK**. The user is added and appears in Navigation > Enterprise Hierarchy.
5. You can configure user privileges, which specify the tasks that the user can perform. For more information, refer to Configuring Privileges.

Setting Default Roles

You can set a user's role as the default role, if it is not already configured as the default role. Users are logging in to Perceptive DataTransfer with their default role.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, navigate to the user for which you want to set the default role and perform one of the following actions.
   - In the desktop view, right-click the role and select **Set Default** form the popup menu.
   - In tablet view, select the user and click .

   The user role is set as the default.

Deleting Users

To delete a user, complete the following steps.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the **Navigation** pane, perform one of the following actions.
   - In desktop view, right-click the user and select **Delete *User_Name*** from the popup menu.
   - In tablet view, select the user and click .

     A dialog box appears, prompting you to confirm that you want to delete the user.
3. To delete the user, click **Yes**.

The user is deleted and removed from Navigation > Enterprise Hierarchy.

Configuring Privileges

You can configure privileges for a department, role, or user. When you configure privileges for a department, those privileges apply to the department and all the roles and users in the department. When you configure privileges for a role, those privileges apply to the role and to all users who belong to the role.

Note Privileges to use a workspace are configured at the role level.

1. Select **Administration > User**.
2. In the **User Administration** dialog box, in the Navigation pane, click the department, role, or user for which you want to configure privileges.

3. In the **Department Editor**, **Role Editor**, or **User Editor** pane, configure the department privileges (if you selected a user, in the User Editor pane, click the Permissions tab). The following table provides descriptions of the privileges.

   Note Click the arrow icon next to each privilege type to expand it and view the privileges. You can check the privilege type checkbox to select all privileges, or you can check the checkbox for each individual privilege to select it.

Privilege	Description
Administrative Privileges	
User Administration	Administrator can modify user privileges and can configure email addresses for users to which to send notifications; administrators can modify users and roles within that administrator's department only.
Manage Share Groups	Administrator can add, modify, and delete share groups.
Access Server Logs	Administrator can view server logs.
Configure System Properties	Administrator can configure system properties.
Archive Administration	Administrator can create archive rules for jobs.
Workspace	Contains the following options. • View Details: Administrator can view details about workspace versions and can configure notifications for versions. • Edit Details: Administrator can modify workspace details and can configure notifications for versions.
Version Control	Contains the following options. • Create/Move to Edit: Administrator can create new workspace versions and move workspace versions to edit mode. • Move to Test: Administrator can move workspace versions to test mode. • Move to Staged: Administrator can move workspace versions to staged mode. • Move to Active: Administrator can move workspace versions to active mode.

Privilege	Description
Workspace Configuration	Contains the following options. • Add Shared Objects: Administrator can add shared objects to the workspace. • Edit Shared Objects: Administrator can modify workspace shared objects. • Edit File Sources: Administrators can modify file sources. • Edit Connection Groups: Administrator can modify connection groups. • Edit Connections: Administrator can modify connections. • Edit Headers: Administrator can modify header files. • Edit Verification Forms: Administrator can modify verification forms. • Edit ImageNow Index Map: Administrator can modify ImageNow index maps. • Edit Data Providers: Administrator can configure web service data providers. • Edit Document Templates: Administrators can configure document templates. • Procedures ◦ Edit Match: Administrator can configure match logic. ◦ Edit Review: Administrator can configure review logic. ◦ Edit Upload: Administrator can configure upload logic. ◦ Edit Match Display: Administrator can configure match display logic. ◦ Edit Population Selection: Administrator can configure population selection logic.
User Privileges	

Privilege	Description

Tools	Contains the following options.
	• Lookup: User can configure the lookup tool.
	• Check Name: User can configure the check name tool.
	• Export: User can export Perceptive DataTransfer data (for example, lookup values, data provider maps, workspaces, and so on).
	• Data Exports
	  ◦ Edit Data Exports: User can modify data exports.
	  ◦ Run Data Exports: User can run data exports.
	  ◦ Edit Scheduled Data Exports: Users can add, modify, and delete scheduled data exports.
	  ◦ View Data Export Output: Users can view the output of past data exports.
	  ◦ Delete Data Export Output: Users can delete the output of past data exports.
	• Reports
	  ◦ Run Reports: User can run reports.
	  ◦ Edit Reports: User can modify reports and can configure notifications for reports.
	  ◦ Edit Scheduled Reports: User can create, modify, and delete scheduled report rules.
	  ◦ View Report Output: User can view output files for reports that have been run.
	  ◦ Delete Report Output: User can delete output files for reports that have been run.

Version	Contains the following options. • Import: User can import workspace versions. • Edit: User can work in workspace versions in edit mode. • Inactive: User can work in workspace versions in inactive mode. • Staged: User can work in workspace versions in staged mode. • Test: User can work in workspace versions in test mode.
Job	Contains the following options. • Create Jobs: User can create jobs and can configure notifications for jobs. • Edit Recurring Jobs: User can modify recurring jobs. • Edit Job Hold Status: User can place a hold on a job to prevent it from being run. • Enable Auditing: User can enable auditing. • View Archived Jobs: User can view archived jobs.

Privilege	Description
Record	Contains the following options. • Create New Record: User can create new records. • Create Match Record: User can set records as matched records. • Create Suspend Record: User can suspend records.
Notifications	Contains the following options. • Create Notification Groups: User can create new notification groups. • Edit Notification Groups: User can modify notification groups.
Workspaces	Workspace privileges are configured at the role level and are applied to all users in the role. A user can use only one workspace at a time. Check the workspace that the user can use, then set the following options. • Headers: Headers contained in the workspace that the user can use. Check the Headers checkbox to select all headers or check individual headers to select them. • Connection groups: Connection groups contained in the workspace that the user can use. Check the Connection Groups checkbox to select all connection groups or check individual connection groups to select them. • File Sources: File sources contained in the workspace that the user can use. Check the File Sources checkbox to select all file sources or check individual file sources to select them.

4. Click the **Settings** tab to configure email addresses for users to which system notifications are sent. For more information, refer to Configuring Notifications.
5. Click **Save** to save your changes.

Configuring File Sources

You can configure file sources—servers or SFTP connections—for recurring jobs. The file source is the location that contains the input file that the recurring job uses. Recurring jobs run at a specified interval, using the input file from the server or SFTP site to which it can connect.

You can also configure file sources to download additional, non-input files from a specified location. For example, you can create a recurring job that automatically downloads the input file, creates a job for the file, downloads non-input files to be processed by the job, and places the non-input files in a location that Perceptive DataTransfer can access.

Refer to the following topics for more information.

- Adding File Sources
- Modifying File Sources
- Deleting File Sources.
- Copying File Sources
- Testing File Sources

- Removing Sharing on Shared File Sources
- Rolling Back File Sources
- Obtaining the Latest Versions of File Sources
- Export File Sources
- Importing File Sources.

Adding File Sources

You can add a new file source or add a file source that another workspace is sharing.

1. Select **Configuration > File Sources**.
2. In the File Source Administration dialog box, click .
3. In the **Add File Source** dialog box, perform one of the following actions.
    - To add a new file source, complete the following steps.
        1. Click the **Add File Source** tab.
        2. In the **Name** field, type the name of the file source.
        3. From the **Type** drop-down box, select the type of file source (*Server* or *SFTP*).
    - To add a file source that another workspace is sharing, complete the following steps.
        1. Click the **Add Shared File Source** tab.
        2. From the **Workspace** drop-down box, select the workspace that is sharing the file source.
        3. From the **File Source** drop-down box, select the file source you want to add.
4. Click **OK**.
5. In the **Edit File Source** dialog box, perform one of the following actions.
    - To modify a server path file source, perform the following steps.
        1. In the **Name** field, type the name of the file source.
        2. In the **Description** field, type descriptive text about the file source.
        3. In the **Path** field, type the path.
        4. In the **File Pattern** Field, type the file pattern information used to identify the input file located in the specified file source. Perceptive DataTransfer searches the file source for the input file based on the file pattern information specified.

    Use * to search for any number of characters; use ? to search for one character. For example:

        - **.xml* returns all XML files.
        - **.?ml* returns any file with an extension that has one character followed by ml.
        - *Application?.txt* returns all fields that start with Application, that have a single character, and that have a TXT extension.

        Note Perceptive DataTransfer does not verify if the file pattern information is correct.

    - To modify an SFTP file source, do the following.

1. In the **Name** field, type the name of the file source.
2. In the **Description** field, type descriptive text about the file source.
3. In the **URL** field, type the URL of the SFTP connection.
4. In the **Port** field, type the port number.
5. In the **Path** field, type the SFTP connection path.
6. In the **File Pattern Field**, type the file pattern information used to identify the input file located in the specified file source. Perceptive DataTransfer searches the file source for the input file based on the file pattern information specified.

   Use * to search for any number of characters; use ? to search for one character. For example:

   - **.xml* returns all xml files.
   - **.?ml* returns any files with an extension that has one character followed by *ml*.
   - *Application?.txt* returns all files that start with *Application*, that have a single character, and that have a *.txt* extension.
7. In the **Username** field, type the username used to connect to the SFTP connection.
8. In the **Password** field, type the password used to connect to the SFTP connection.
9. In the **File Downloads** pane, complete the following steps.
   1. Check the **Additional Files** checkbox to specify that the file source has other, non-input files to download. When you create a recurring job that uses this file source, the input file is downloaded from the specified path or connection, and then additional files are downloaded from the same path or connection, given the parameters you specify in the File Downloads pane.
   2. In the **File Pattern** field, type the file pattern information used to identify the non-input file located in the file source.
   3. In the **Destination Path** field, type the location where the non-input files are placed when they are downloaded. The path must be on a Perceptive DataTransfer server or reachable from the Perceptive DataTransfer server.
10. In the **Source File** Options pane, specify how to manage the additional, non-input files in the file source location. Click one of the following radio buttons.
    - **Leave**: Performs no action on the files.
    - **Archive**: Archives the files and moves them to a location that you specify in the Archive Path field.
    - **Delete**: Permanently deletes the files from the file source.
11. Click **OK**.

The file source is added and appears in the File Source Administration dialog box.

Modifying File Sources

To modify a file source, complete the following steps.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, click the file source you want to modify and either click or right-click the file source and select **Edit**.

3. In the **Edit File Source** dialog box, perform one of the following actions.
   - To modify a server path file source, complete the following steps.
     1. In the **Name** field, type the name of the file source.
     2. In the **Description** field, type descriptive text about the file source.
     3. In the **Path** field, type the path.
     4. In the **File Pattern Field**, type the file pattern information used to identify the input file located in the specified field source. Perceptive DataTransfer searches the file source for the input file based on the file pattern information specified.

        Use * to search for any number of characters; use ? to search for one character. For example:
        - **.xml* returns all xml files.
        - **.?ml* returns any files with an extension that has one character followed by *ml*.
        - *Application?.txt* returns all files that start with *Application*, that have a single character, and that have a *.txt* extension.

     Note Perceptive DataTransfer does not verify if the file pattern information is correct.
   - To modify an SFTP file source, complete the following steps.
     1. In the **Name** field, type the name of the file source.
     2. In the **Description** field, type descriptive text about the file source.
     3. In the **URL** field, type the URL of the SFTP connection.
     4. In the **Port** field, type the port number.
     5. In the **Path** field, type the SFTP connection path.
     6. In the **File Pattern Field**, type the file pattern information used to identify the input file located in the specified field source. Perceptive DataTransfer searches the file source for the input field based on the file pattern information specified.

        Use * to search for any number of characters; use ? to search for one character. For example:
        - *.xml returns all xml files.
        - *.?ml returns any files with an extension that has one character followed by ml.
        - Application?.txt returns all files that start with Application, that have a single character, and that have a .txt extension.
     7. In the **Username** field, type the username used to connect to the SFTP connection.
     8. In the **Password** field, type the password used to connect to the SFTP connection.
4. In the **File Downloads** pane, complete the following steps.
   1. Check the **Additional Files** check box to specify that the file source has other, non-input files to download. When you create a recurring job that uses this field source, the input file is downloaded from the specified path or connection, and then additional fields are downloaded from the same path or connection, given the parameters you specify into eh File Downloads pane.

   2. In the **File Pattern** field, type the file pattern information used to identify the non-input file located in the file source.
   3. In the **Destination Path** field, type the location where the non-input files are placed when they are downloaded. The path must be on a Perceptive DataTransfer server or reachable from the Perceptive DataTransfer server.

5. In the **Source File Options** pane, specify how to manage the additional, non-input files in the file source location. Click one of the following radio buttons.
   - **Leave**: Performs no action on the files.
   - **Archive**: Archives the fields and moves them to a location that you specify in the Archive Path field.
   - **Delete**: Permanently deletes the files from the file source.
6. Click **OK**.

Deleting File Sources

To delete a file source, complete the following steps.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, select the file source you want to delete and either right-click it and select **Delete** or click .

The file source is deleted and is removed from the File Source Administration dialog box.

Copying File Sources

To create a duplicate of a file source, complete the following steps.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, select the file source you want to copy and either right-click it and select **Copy** or click .

A copy of the file source is created and appears in the File Source Administration dialog box.

Testing File Sources

To test a field source connection, complete the following steps.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, select the file source you want to test and either right-click it and select **Test File Source** or click .
   - If the file source works properly, a dialog box appears and states that the test was successful.
   - If the file source does not work properly, a dialog box appears and indicates the reason that the test failed.

Removing Sharing on Shared File Sources

To remove sharing on a file source that is shared with another workspace, do the following.

1. Select **Configuration > File Sources**.

2. In the **File Source Administration** dialog box, select the file source for which you want to remove sharing and either right-click it and select **Remove Sharing** or click .

Sharing is removed on the file source.

Rolling Back File Sources

If changes have been made and committed to a file source, you can use a previous version (*roll back*) of it.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, click the file source you want to roll back and either right-click it and select **Rollback** or click . **The Rollback Manager** dialog box displays the following information.
   - **Name**: Name of the file source.
   - **Status**: Status of the file source (*current* or *dated*).
   - **Version Date**: Date and time on which the version was created.
   - **Created By**: Username of the user who created the file source.
   - **Comments**: Comments that were added by the user.
3. Select the previous version to which you want to revert and click **Rollback**.

The previous version is loaded.

Obtaining the Latest Versions of File Sources

If changes have been made to and committed to a file source, you can obtain the latest version of it.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, click the source file for which you want to obtain the latest version and either right-click it and select **Get Latest** or click .

Export File Sources

Note You cannot export file sources in tablet view.

You can export files sources to an XML file by completing the following steps.

1. Select **Configuration > File Sources**.
2. In the **File Source Administration** dialog box, select the source file you want to export.
3. Click and select **Export**.
4. Save the file to the appropriate location.

Importing File Sources

Note You cannot import file sources in tablet view.

You can import file sources from an XML file by doing the following.

1. Select **Configuration > File Sources**.

2. In the **File Source Administration** dialog box, click  and select **Import**.
3. In the **Import File Source** dialog box, click the **Browse** button and navigate to the file that you want to import or type the location of the file in the **File** field.
4. Check the **Update Existing Entities** check box to update an existing file source, with the same name as the file source you are importing, with the file source you are importing.

   If you do not check this checkbox, and there is an existing file source with the same name as the file source you are importing, *DUPLICATE-* is appended to the start of the name of the file source you are importing; the existing file source is not updated. If a file source exists with the name DUPLICATE-

   <*file_source_name*>, *DUPLICATE(2)-* is appended to the start of the name. The number continues to be incremented so that all file sources have unique names.
5. Click **OK**.

Configuring jobs and processing records

Jobs contain all functions required to load data into your database. A job consists of the following information.

- **Header**: Defines the input data source, mapping values from the input file to the source destination in your database.
- **Connection group**: Comprises database connections to your database.
- **Input Source**: Source from which you are importing data (for example, a spreadsheet containing test information for students). Input sources can be fixed-width, delimited, XML files, EDI files, database queries, or web service calls.

  Note: EDI files are supported in Perceptive DataTransfer 6.4.4 and higher.
- **Date and time**: Date and time on which the job starts (if not specified, the job is run manually).

When you run a job, Perceptive DataTransfer processes all records from the input source for the job.

Refer to the following topics for more information.

- Understanding the Perceptive DataTransfer desktop and tablet Job Dashboard
- Understanding the Perceptive DataTransfer mobile Job Dashboard
- Customizing columns
- Adding and modifying recurring jobs
- Adding new jobs
- Modifying job details
- Opening jobs
- Running jobs
- Deleting jobs
- Canceling jobs

Understanding the Perceptive DataTransfer desktop and tablet Job Dashboard

The following figure displays Perceptive DataTransfer Job Dashboard for the desktop and tablet view. Not all features are available on the tablet view.

The Job Dashboard provides the following information.

Element	Description
Status drop-down box	Filters the status of the jobs you view in the Job Dashboard table. When you select an option, the table displays jobs with the selected status. Options are: • Active: Active jobs are jobs that have not yet started (pending), jobs that have run but for which there are unprocessed records (incomplete), or jobs that have run but for which there are suspended records (processed). • Complete: Complete jobs have been run and all records have been processed as new or match; there are no suspended or unprocessed records. • Archive: Archive jobs are historical jobs that have been archived. • Canceled: Canceled jobs have been canceled by a user.
Name column	Name of the job. Click + to expand the job entry and view details about the job. The following fields display. • File Name: Filename of the input file used by the job. • Created On: Date on which the job was created. • Created by: Username of the user who created the job. • Start Time: Date and time on which the job started to run. • End Time: Date and time on which the job ended. • In Use by: Username of the user who is running the job.
File Name column	Filename of the input file used by the job.
Scheduled Start Time column	Date and time on which the job was scheduled to start.

Element	Description
Status column	Status of the job. • Complete: The job has finished running, and there are no unprocessed or suspended records. • Incomplete: The job is not currently running and has processed and unprocessed records. • Processed: The job has finished running, but there are suspended records. • Pending: The job has not yet started. • Processing: The job is currently running. • Canceled: The job was canceled. • Archive: The job was archived.
Records Status column: Provides the following subcolumns. • Progress: Provides a status bar indicating job progress when it is being run. • Total: Number of total records for the job. • Unprocessed: Number of records that the job did not process. • Suspended: Number of suspended records. • Matched: Number of matched records. • New: Number of new records. • Locked: Number of locked records.	
Header column	Name of the header used for the job.
Connection Group column	Name of the connection group for the job.

Understanding the Perceptive DataTransfer mobile Job Dashboard

If you are using DataTransfer on phones with smaller screens or resolutions, the mobile Job Dashboard displays; the layout and functionality are the same for mobile Dashboards, but the overall design varies among devices.

The mobile Job Dashboard displays the Active Jobs page, which displays a list of active jobs. To filter the status of jobs displayed in the Job Dashboard, **Settings > Filter**, and then select the job status you want to display.

To view details about a job in the mobile Job Dashboard, select the appropriate job. The following details are displayed.

- Name: Name of the job.
- Status: Status of the job.
- Active: Active jobs are jobs that have not yet started (pending), jobs that have run but for which there are unprocessed records (incomplete), or jobs that have run but for which there are suspended records (processed).

  - Complete: Complete jobs have been run and all records have been processed as new or match; there are no suspended or unprocessed records.
  - Archive: Archive jobs are historical jobs that have been archived.
  - Canceled: Canceled jobs have been canceled by a user.
- File: Filename of the input file used by the job.
- Progress: Displays a bar that shows the percentage of the job completion.
- Total: Total number of the job.
- Unprocessed: Total number of records not processed by the job.
- Matched: Number of matched records.
- New: Number of new records.
- Locked: Number of locked records.

You can also run jobs in the mobile Job Dashboard; for more information, refer to Running jobs.

Customizing columns

You can customize the columns displayed in the Job Dashboard.

Columns are automatically saved the way in which you displayed them when you last logged out of the application or when you switched roles.

To choose the columns you want to display, complete the following steps.

1. Hover your mouse over the appropriate column.
2. In the drop-down list that displays on the right side of the column, click the arrow to open a menu that allows you to sort columns from A-Z or Z-A and also allows you to select the columns you want to display.
3. Select **Columns** and then check the columns you want to display; uncheck the columns you do not want to display.

After you log out of the application or change roles, the columns you specified to show or hide are displayed in the Job Dashboard the next time you log in.

Adding and modifying recurring jobs

Recurring jobs run at a specified interval, using a file from a specified data source or file source. To add or modify a recurring job, complete the following steps.

1. Select **Jobs > Recurring Jobs** to display the **Recurring Job Administration** dialog box.
2. Perform one of the following actions.
   - To add a new job, click to display the **Add Recurring Job** dialog box.
   - To modify a job, select the recurring job and click . The **Edit Recurring Job** dialog box appears.
3. In the **Job Name** field, type the name of the job.
4. In the **Status** field, click the **Enable** option to enable the recurring job; click **Disable** to disable it.
5. From the **Header** drop-down box, select the header file used for the job.

6. From the **Connection Group** drop-down box, select the connection group.
7. From the **File Source** drop-down box, select the file source (server or SFTP connection) that contains the input file.

   File Sources are configured in Perceptive DataTransfer in **Configuration > File Sources**; for more information, refer to Configuring File Sources.

   This field is unavailable if you are using a database, web service, or Hobsons Connect CRM header.
8. From the **Start time** drop-down box, select the time on which the job starts. If you do not specify a start date and start time, the job is run only manually.
9. In the **Options** pane, specify the following information.
   - Check the **Log SQL** check box to log SQL messages; these messages appear in the Log View dialog box (refer to Viewing Log Messages).
   - Check the **Allow Duplicate Filenames** check box to allow jobs to have the same name.
   - Check the **Use Filename** check box to include the name of the input file in the job name. When you add a new job, the name of the input file is appended to the job name.
   - Check the **Delete Files** check box to delete input files from the server after they have been used for the recurring job.
10. In the **Job Restrictions** pane, complete the following substeps.
    - Check the **Limit other users from running** check box to prevent other users from running this job.
    - Check the **Limit other users from opening or editing until processed or completed** check box to prevent other users from opening or editing the job until it has finished processing records or has completed running.
11. In **the Recurrence Pattern** pane, specify when the job recurs.
    - Click the **Daily** option to specify that the job recurs daily, and then specify the recurrence frequency.
    - Click the **Weekly** option to specify that the job recurs weekly, and then specify the recurrence frequency.
    - Click the **Monthly** option to specify that the job recurs monthly, and then specify the recurrence frequency.
    - Click the **Auto** option to specify that the job recurs automatically whenever a file is added to the file source used for the job. The Delete Files option is automatically selected to prevent duplicate jobs from being created using the same file. You can use only headers that use file sources to provide data; therefore, you cannot create automatically recurring jobs that use headers of types database, Hobsons Connect CRM, or web service.

- Click the **Manual** option to specify that the job recurs manually. It does not have a scheduled run date and recurs only when manually started. You can start the job anytime in the Recurring Job Administration dialog box or by calling the StartManualJob web service from a third-party application (refer to *Perceptive DataTransfer API Guide* for more information). Refer to Running manual recurring jobs for information on running manual recurring jobs.

12. Click the **Notifications** tab to configure email notifications to be sent when certain job activities occur. Refer to Configuring Notifications.
13. Click **OK**.

The recurring job is added and appears in the **Recurring Job Administration** dialog box. When an instance of this job is scheduled, the instance is created and appears in the **Job Dashboard**.

Adding new jobs

To add a new job, complete the following steps.

1. Select **Jobs > Add Job**.
2. In the **Add Job** dialog box, the **Job Name** field displays the name of the job. The default name of the job is *USER DATE TIME*, where *USER* is the username of the user who created the job, *DATE* is the date (month, day, and year) on which the job was created, and *TIME* is the time that the job was created.
3. From the **Header** drop-down box, select the header file used for the job.
4. From the **Connection Group** drop-down box, select the connection group.
5. In the **Input File** field, click **Browse** and select the input file, which contains the data that you want to import, to use for the job.
6. From the **Dependent On** drop-down box, select the job on which you want the new job to be dependent. Jobs that you can select have one of the following statuses: *Pending*, *Incomplete*, *Connection_Error*, *Record_Key_Error*, and *On Hold*.
7. In the **Release On** field, click the appropriate option for when you want the On Hold status to be removed from the new job. If you click **Complete**, the new job starts when the job on which it is dependent obtains *Complete* status. If you click **Processed**, the new job starts when the job on which it is dependent obtains *Processed* status.
8. In the **Start Date** field, click the calendar icon to display a pop-up calendar; then, select the date on which the job starts.
9. From the **Start time** drop-down box, select the time on which the job starts. If you do not specify a start date and start time, the job is run only manually.
10. Check the **Log SQL** check box to log SQL messages; these messages appear in the **Log View** dialog box (refer to Viewing Log Messages).
11. In the **Job Restrictions** pane, complete one of the following actions.
    - Check the **Limit other users from running** check box to prevent other users from running this job.
    - Check the **Limit other users from opening or editing until processed or completed** check box to prevent other users from opening or editing the job until it has finished processing records or has completed running.
12. Click **OK**.

    The job is created and is added to the table.

    Note If you enabled **Preferences > Filename in Job Name**, the name of the input file is appended to the job name.

Modifying job details

To modify job details, complete the following steps.

1. Complete one of the following actions.

- Select a job in the Job Dashboard and right-click it and select **Details**.
- Select a job in the Job Dashboard and click the **Details** button. The Edit Job Details dialog box appears.

2. In the **Job Name** field, type the name of the job.

   Note You cannot modify any other fields, except the **Job Name** field, if you are modifying a job with any status other than *Pending*.

3. From the **Connection Group** drop-down box, select the connection group to use for the job.
4. In the **Start Date** field, click the calendar icon to open a calendar, and then select the date on which the job starts.
5. From the **Start Time** drop-down box, select the time on which the job starts.
6. Click **OK** to save your changes and close the dialog box.

Opening Jobs

To open a job, complete the following steps.

1. Complete one of the following actions.
   - Select a job in the table in the **Job Dashboard** and click the **Open** button.
   - Double-click a job in the **Job Dashboard** table.

     A window displays information about the job.

     Note Only the **Records** pane appears in tablet view
2. To filter records in the **Records** pane, right-click a job, select **Filter By**, and select the status of the records you want to display. You can also select the filter option from the **Filter by** drop-down box. Options are:
   - All
   - Unprocessed
   - Suspended
   - Match
   - New
   - Locked

   Records text is colored according to status.

   - Locked: Purple
   - Match: Green.
   - New: Blue
   - Suspend: Red
   - Unprocessed: Black

   The Rank column identifies the stage of matching during which the record was set as Match or New. The value indicates the level of match routines executed before you determined that the record was Match or New. If the record is unprocessed or suspended, the rank value is empty.

Rank information is configured by your Perceptive DataTransfer administrator.

Status	Record	$TERM
Locked	1	201050
Unprocessed	2	201050
New	3	201050
Match	4	201050
Suspended	5	201050

3. If sorting is enabled on a column, when you click a column heading, the field is sorted, depending on the type of information contained in the column. The field can be sorted alphanumerically, numerically, or by date.
4. In this window, you can also complete the following steps.
   - Reset a record. Refer to Resetting records.
   - Lock a record. Refer to Locking records.
   - Modify a record. Refer to Modifying records.
   - Suspend a record. Refer to Suspending records.
   - View the reason that a record was suspended. Refer to Viewing the suspend reason.
   - View XML records (desktop view only). Refer to Modifying records.

Resetting records

To reset any *Processed* record to *Unprocessed*, complete the following steps.

1. Select a job in the **Job Dashboard** and click **Open**.

   A window displays information about the job.
2. Complete one of the following actions.
   - In desktop view, right-click the record in the **Records** pane and select **Reset Record**.
   - In tablet view, select the record and click the **Reset** button.

The record is reset to *Unprocessed* and its information is updated in the **Records** pane.

Locking records

When you lock a record, it is not processed when you run a job. To lock a record, complete the following steps.

1. Select a job in the **Job Dashboard** and click **Open Job**.

   A window displays information about the job.
2. Complete one of the following actions.
   - In desktop view, right-click the record in the **Records** pane and select **Lock Record**.
   - In tablet view, select the record and click the **Lock** button.

The record is locked. Its status is changed to *Locked* in the **Records** pane.

Modifying records

1. Select a job in the **Job Dashboard** and click **Open Job**.

   A window displays information about the job.

2. Complete one of the following actions.

   - In desktop view, right-click the record in the **Records** pane and select **Edit Record**. The **Record Editor** dialog box appears.
   - In tablet view, select the record and click the **Edit** button. The **Record Editor** dialog box displays.
   - To view XML records, in desktop view, right-click a record (for a job using an XML or EDI header) and select **View Full Record**.

   Note: EDI headers are supported in Perceptive DataTransfer 6.4.4 and higher.

3. Complete one of the following actions.

   - If you are modifying records for jobs using headers other than XML or EDI headers, the **Record Editor** dialog box appears and displays the following information about the variables for the record.
     - **Pos**: Numerical value of the position of the field in the input file.
     - **Field Name**: Name of the field.
     - **Value**: Value of the field.

     Note: EDI headers are supported in Perceptive DataTransfer 6.4.4 and higher.
   - If you are modifying records for jobs using XML or EDI headers, the **Edit XML Record** dialog box appears. In the **Node** column, a ✔ icon appears next to XML tags that will appear in the **Records** pane; a ▬ icon appears next to XML tags that will not appear.

     To expand all nodes in the XML tree, click ⊕. To collapse them, click ⊖.

     Note: EDI headers are supported in Perceptive DataTransfer 6.4.4 and higher.

4. To select the next record, click the **Next** button; to select the previous record, click the **Previous** button.
5. To modify the value of a record, double-click the entry in the **Value** column and then type the appropriate value. For XML records, you can assign values to only nodes that do not have child nodes.
6. To apply your changes, click **Apply**. If you click **Previous**, **Next**, or **Close** without saving your changes, a dialog box appears and prompts you to confirm that you want to save your changes before the action is performed for the button you clicked.

The input record is updated with the changes you made, and its information is updated in the **Records** pane.

Viewing logs

Click the **View Logs** button to view information about the job. Refer to Viewing Log Messages for more information.

Suspending records

If Perceptive DataTransfer cannot upload a new record to the database when you run a job, the record is automatically suspended.

You can manually suspend a record if there is an issue with the record that you need to investigate further.

1. Select a job in the **Job Dashboard** and click **Open Job**.

   A window displays information about the job.

2. Complete one of the following actions.
   - In desktop view, right-click the record in the **Records** pane and select **Suspend Record**.
   - In tablet view, select the record and click the **Suspend** button.
3. In the **Suspend Record** dialog box, in the **Enter suspend reason** field, type the reason for which you are suspending the record.
4. Click **OK**.

The record is suspended. Its status changes to *Suspended*, and the record text is highlighted in red in the **Records** pane.

Viewing the suspend reason

To view the suspend reason for a single suspended record, complete the following steps.

1. Select a job in the **Job Dashboard** and click **Open Job**.
2. In the window that displays job information, perform one of the following actions.
   - In the desktop view, right-click the record in the **Records** pane and select **View Suspend Reason**.
   - In tablet view, select the record and click the **View Reason** button.

The **View Suspend Reason** dialog box appears and displays the reason that the record was suspended.

Searching records

You can search for information within the entire job or within a specific column of the **Records** pane.

Note Searches are not case-sensitive.

To search for information in the entire job, in the **Records** pane, type the text for which you want to search in the **Find** field; then press **Enter**.

If one or more results are returned, the **Records** pane is refreshed and all matching terms are highlighted in yellow. If more than one result is returned, the (previous) and (next) buttons are enabled, which you can use to navigate to any available previous or next results. When you hover your mouse over these buttons, tooltips appear and indicate the result to which you will navigate if you click the button.

To stop viewing search results, click . The text in the **Find** field is cleared, the search controls are disabled, and the current page of records is refreshed without the highlighted terms.

You can also search for information within a specific column. The tooltip that appears when you hover your mouse over the Find field provides more information and an example of how to perform the search.

Type **[COLUMN]* at the end of the search term to search for the term only within the specific column.

For example, for the search term *M*[GENDER*], Perceptive DataTransfer searches for the term M within only the $GENDER column.

If you do not provide the correct name of the column, and the incorrect column name does not exist, Perceptive DataTransfer searches the entire job for the search terms.

For example, for *M*[$GENDE]*, if the $GENDE column does not exist, Perceptive DataTransfer searches the entire job for *M*[$GENDE]*.

Running jobs

Refer to the following topics for more information.

- Understanding run modes
- Running manual recurring jobs
- Running jobs in batch mode
- Running jobs in interactive mode
- Setting On Hold jobs
- Monitoring jobs

Understanding run modes

You can run jobs and records in interactive or batch mode; the mode is determined by your Perceptive DataTransfer administrator.

In interactive mode, you load your data one record at a time. You open the job to view the Job window and run the job from there. As Perceptive DataTransfer runs through each record in the match process, it prompts you to add the record as either a new record or a match record.

In tablet view, you cannot run jobs in interactive mode.

In batch mode, you can load all records without Perceptive DataTransfer pausing between records to prompt you for input. You can run the job from the Job Dashboard.

Running manual recurring jobs

If a recurring job can be run manually, you can run it at any time by completing the following actions.

1. Select **Jobs > Recurring Jobs**.
2. In the **Recurring Job Administration** dialog box, click .

You can specify that the recurring job is run manually in the **Add Recurring Job** and **Edit Recurring Job** dialog boxes. Refer to Adding and modifying recurring jobs for more information.

Running jobs in batch mode

To run a job in batch mode, complete one of the following actions.

- In the desktop **Job Dashboard**, select the job you want to run and select **Run** from the popup menu or click the **Run** button.

- In the mobile **Job Dashboard**, select the job you want to run and select  .

To stop a job that is running, complete one of the following actions.

- In the desktop **Job Dashboard**, right-click the job and select **Stop** or click the **Stop** button.
- In the mobile **Job Dashboard**, select  .

After Perceptive DataTransfer processes the job, you can open the job to view job results, including information about any suspended or unprocessed records.

Running jobs in interactive mode

Note You cannot run jobs in interactive mode in tablet view.

To run a job in interactive mode, complete the following steps.

1. Select a job in the table and click **Open Job**.

   A window displays information about the job.

2. Complete one of the following actions.
   - To process a single record in the job, select the record in the topmost pane and click the **Run** button.
   - To process all records in the job, click the **Run All** button.
   - To stop running the job, click **Stop** in the bottom toolbar.

Depending on your configuration, you may receive the **Prompt** dialog box for a record, which displays message text and allows you to update values of information for the record.

For example, you may receive a message that the address information is not correct, and you can update address information, such as street number, city, and state.

To modify a value, click the row of in the Value column and type the appropriate text.
Then, complete one of the following actions.

- Click **OK** to apply your changes. The information is updated and jobs processing resumes.
- Click **Reset** to reset the values in the Prompt dialog box to the original values.
- Click **Cancel** to stop processing on the record. The Error Processing dialog box appears and provides information about why the record could not be processed.

If you enabled the **Display All Match Results** preference, when you run a job in interactive mode, all possible record matches are compiled before the application pauses to allow you to review the possible matches. For more information, refer to Specifying Preferences.

Depending on your configuration, you may receive a **Result Selection** dialog box, which displays a prompt in the top field and values, returned by the job, below it. This dialog box appears if multiple records of information are obtained from the job; select the information you want to use and click **OK**.

When Perceptive DataTransfer processes records in interactive mode, one of the following occurs.

- If a record cannot be processed, a dialog box appears and displays information about why the record could not be processed. The dialog box contains the following information:
  - **Procedure Name**: Name of the programming procedure that contains the problem.

- **Line #**: Number of the line in the procedure in which the problem occurred.
- **Error Information**: Description of the problem in the procedure.

- If a new record could not be uploaded, the record is suspended.
- If Perceptive DataTransfer cannot find a matching record in the database, a dialog box appears and prompts you to create a new record. Click **Yes** to create the record and add it to your database; click **No** if you do not want to create a new record.
- If there are potential matches in your database, Perceptive DataTransfer pauses and prompts you to review results, which are displayed in the **Results** pane. Perceptive DataTransfer organizes the results based on a ranking of how likely they are to be matches to the input data.

  Click to continue to process records to search for results that are more possible.

  - If Perceptive DataTransfer does not find a match, you are prompted to create a new record. Click **Yes** to create the record; the record is updated in the topmost pane, with its status changing to New and its label color changing to blue.
  - If you find a matching result and want to create a matched record, select the result in the Results panel and click the **Matched** button. The record's status is updated as *Match*, its color changes to green, and it is updated in the topmost pane.

    After Perceptive DataTransfer uploads a record, an informational dialog box appears and displays the record number that was processed and if it was "successfully matched," if it was "successfully created," or if it "failed to upload."

    You can use the verification form, if configured, to compare information from the current input record and potential matches in your database. Refer to Viewing the verification form.

Viewing the verification form

With the verification form, you can compare the current input record side-by-side with the possible existing record.

Forms are configured by your Perceptive DataTransfer administrator.

Note The form is displayed only when a job is running in interactive mode.

When you run a record, the verification form displays data associated with the input record and the possible record in your database.

Depending on your Perceptive DataTransfer configuration, you can select information, if changed, that could be included to be uploaded to your database.

If an area that contains a group of information (for example, in the preceding figure, Name or Permanent Address) has a checkbox, you can check the checkbox if you want Perceptive DataTransfer to verify that the information has changed and can be uploaded. Your Perceptive DataTransfer administrator configures Perceptive DataTransfer to verify if the information has changed and can be uploaded.

After you review the data in the verification form and compare it with the possible matched record in the database, you can create a new record, create a matched record, or suspend the record.

Setting On Hold jobs

You can set a job status to be *On Hold* so that it cannot be run interactively or in batch mode until the hold status is released. You can set a job on hold if it has one of the following statuses: *Pending*, *Incomplete*, *Connection_Error*, or *Record_Key_Error*.

To set a job as on hold, select the job in the **Job Dashboard** and click **Hold**.

To remove the on hold status from the job, select the job in the **Job Dashboard** and click **Release**.

Monitoring jobs

- Select a job in the **Job Dashboard** and click **Monitor**.
- The **Job Progress** dialog box appears in the foreground of your browser and remains open and in the foreground until you click **Close**.
- A progress bar appears at the top of the dialog box, indicating the percentage complete of the job. The dialog box displays the following information.
  - **Total**: Total number of records in the job.
  - **Unprocessed**: Number of records that are not processed.
  - **Suspended**: Number of suspended records.
  - **Matched**: Number of matched records.
  - **New**: Number of new records.
  - **Locked**: Number of locked records.

When the job is running, the **Stop** button appears in the **Job Progress** dialog box; click it to stop running the job. When the job has completed, only the **Close** button is displayed.

Deleting jobs

Refer to the following topics for more information.

- Deleting jobs
- Deleting recurring jobs

Deleting jobs

You can delete a job that has never been run (the job has a status of pending and all its records are unprocessed). You cannot delete jobs that have fully completed.

To delete a job, complete the following steps.

1. Complete one of the following actions.
   - In the desktop **Job Dashboard**, select the job you want to delete and click **Delete**.
   - In the mobile **Job Dashboard**, select the job you want to delete and click  . Perceptive DataTransfer prompts you to confirm that you want to delete the job.
2. To delete the job, click **Yes.**

The job is deleted and is removed from the **Job Dashboard**.

Deleting recurring jobs

To delete a recurring job, complete the following steps.

1. Select **Jobs > Recurring Jobs**.
2. In the **Recurring Job Administration** dialog box, select the recurring job you want to delete and click  .

   A dialog box appears and prompts you to confirm that you want to delete the job.
3. To delete the job, click **Yes**.

The job is deleted and is removed from the **Recurring Job Administration** dialog box.

Canceling jobs

You can cancel all jobs except those that has never been run (the job has a status of pending, and all its records are unprocessed).

You can cancel jobs that have at least one record that has been processed. However, you cannot cancel jobs that have fully completed.

When you cancel jobs, they are removed from the **Job Dashboard** when you select **Active** from the Status drop-down box.

To cancel a job, complete the following steps.

1. Complete one of the following actions.
   - In the desktop **Job Dashboard**, select the job you want to cancel and click **Cancel**.
   - In the mobile **Job Dashboard**, select the job you want to cancel and click  . Perceptive DataTransfer prompts you to confirm that you want to cancel the job.
2. To cancel the job, click **Yes**.

The job is canceled, and its status is set to *Canceled* in the **Job Dashboard**.