

Perceptive Intelligent Capture for Transcripts

Release Notes

Version: 2.1.x

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Release 2.1 (April 2017)

General Notes

This document, the Release Notes for Perceptive Intelligent Capture for Transcripts (PICT) 2.1.2100, contains descriptions of enhancements and updates identified by Customers, Support, and the Professional Services implementation teams.

Compatibility

You can only use Version 2.1.2100 with Intelligent Capture version 5.6 SP1 with TTE add-on 5640, 5.6 SP2, or 5.7 with TTE patch 5721, or 5.7 SP1 with TTE patch 5721.

New Features

| Category | Description |
|------------------------|---|
| Extraction/Validation | Added 10 Custom fields to the Verifier form which are used to capture additional data. These fields are not automatically extracted from the Transcript. You can either lasso the data from the Transcript or manually enter data into these fields. |
| Extraction | Enabled extraction of numeric grades from the coursework table in college transcripts. To execute this, you need to add the institution IDs, for which numeric grades are present, to the relevant database table. If the institution ID is available in the database configuration, the system removes any RTS extracted grade and extracts numeric grade for the transcript. Additionally, if the institution ID for a college transcript does not exist in the database configuration, the system attempts to extract numeric grades from the coursework details, if no alpha grades were initially extracted. |
| Configuration/Settings | Enabled connectivity between PIC for Transcripts and Perceptive Connect Runtime (PCR). The BRWPCO configuration table is updated to activate the connection. The Connector acts as the bridge between Perceptive Content and PICT. It also enables you to receive status updates and execute XML export through the REST Web Service. |
| Configuration/Settings | Modified the default minimum and maximum scores for ACT writing to match the current minimum and maximum scores allowed by the ACT. The user does not need to manually change these scores during implementation. The minimum and maximum scores, stored in the BRWACTScores table, are changed from 2 and 12 to 1 and 36 respectively. |
| Configuration | Enabled the ability to configure high school coursework filtering by profile. This feature allows the user to configure unique export filters for different clients. |
| Configuration/Settings | Enabled the ability to configure batch filtering within the Verifier batch list based on the transcript type, such as Military, College, or High School. A new table BRWBAT is added to the configuration database for this purpose. |

| Category | Description |
|-----------------------|---|
| Validation | <p>Enabled the ability to validate SAT transcripts for tests held after March 2016 with the new scoring methodology, as well as the ones held before March 2016 with the old scoring format. The tests held prior to March 2016 were reported on a scale of 200 – 800 on each of the three sections, Math, Reading and Writing, and Essay. The total score range was 600 – 2400. The tests held after 2016 are reported on a scale of 200 – 800, in 10 point increments on each of the two sections, Math and Evidence-Based Reading and Writing. The total score range has changed to 400 – 1600. The essay is now optional and is scored on a scale of 0 – 24, in 1 point increments.</p> |
| Extraction/Validation | <p>Enabled extraction and validation of ACE identifiers from Joint Service Transcripts that include version numbers in the ACE ID.</p> |
| Extraction | <p>Enabled extraction of the Start Date from the Joint Service Transcripts.</p> |
| Extraction | <p>Enabled extraction and export of Credit Area, Credit Recommendation, and Course Level (lower or upper division course) from the Joint Service Transcripts.</p> |
| Configuration | <p>Enabled controlling the Perceptive Matching Engine (PME) configuration options externally from the Perceptive Intelligent Capture Designer. This helps to migrate projects from the testing to the production environment without making changes by using the Designer.</p> <p>PIC version 5.7 introduced PME as an alternative implementation of the Associate Search Engine (ASE). A project can be configured to use PME in the Designer application by selecting the "Remote Matching Service" option from the "Used core engine" list when the "Associative Search Engine" is selected as the analysis engine. After the "Remote Matching Service" is selected, the connection options can be specified via the GUI. The necessary connection options are:</p> <ul style="list-style-type: none"> • URL • Connection String • Search Index <p>These options can currently be configured only through the Designer GUI. PICT configuration allows "Remote Matching Service" to be selected and configured through the project INI file, thereby eliminating the need to use the Designer GUI.</p> |
| Validation | <p>Enabled validation of both Start Date and Date Completed fields in the Joint Service Transcripts. This ensures that the extracted data is correct.</p> <p>The Start Date and Date Completed are marked as invalid if the following validations fail:</p> <ul style="list-style-type: none"> • Start Date is greater than the Date Completed. • The difference in Start Date and Date Completed is not greater than a configurable number of days. <p>The JSTDateGapAllowed column is added to the BRWDAT table and set to 365 by default.</p> |
| Export | <p>Resolved the type identification problem for Joint Service Transcripts. The PICT project is updated to export the ACT, SAT, and Other test scores to XML as designed in the common.xsd file.</p> <p>Since the XML export pattern changes with this version, the usage of customised XML parsing tools with earlier versions needs to be updated accordingly.</p> |

Fixed Defects Build 2.0.2000 to build 2.1.2100

| ID | Description |
|------------|--|
| TFS #11658 | Fixed the defect of terms being duplicated in eForm. The terms were duplicated during XML export due to case sensitivity. The issue is resolved now in XML export by using upper case for all terms. |
| TFS #2066 | Fixed the defect where the term on the second column was not properly extracted for some multi-column and landscape-oriented transcripts. |
| TFS #2082 | Fixed the defect where unique transcript terms were not extracting correctly to coursework for specific universities. |
| TFS #2085 | Fixed the defect where the grade points extracted from some documents were placed in the Earned column instead of the Grade Points column. |
| TFS #2086 | Fixed the defect where the extracted grade points were not properly optimized. For example, the extracted value "16.00" was entered as "16-00" in the Grade Points column due to poor quality of scan. |
| TFS #20104 | Fixed the defect where all military fields and some college coursework fields required an input in Verifier even after setting RequiredInVerifier to FALSE. Now, if RequiredInVerifier is set to FALSE for these fields, no further input is required in Verifier. |
| TFS #20141 | Fixed the defect where the validation process was running even if the Final Grade column was marked as inactive. However, the validation could not be completed as the invalid cells in the Coursework table were not displayed. Now, if the Final Grade column for High School is marked as inactive, the validation process is no longer triggered. |
| TFS #20380 | Fixed the defect where, for certain documents, the "Term" details for transfer credit in the coursework table was not getting extracted from the correct stack in the document. |
| TFS #20382 | Fixed the defect where, for certain documents, if a term was not OCR'd properly, then the subsequent coursework rows were incorrectly associated with the previous term. |
| TFS #20383 | Fixed the defect where, for certain documents, if the term details for a course continued for more than a page, the rows on the next page(s) did not extract the term. |
| TFS #20384 | Fixed the defect where the first few rows of the coursework related to Transfer Credit of different universities did not include any candidates for certain documents. These rows were getting incorrectly associated with either terms from different stacks or, with the admission term from the student info section. |
| TFS #2101 | Fixed the defect where the XML export routine did not escape the "&" character that was being eliminated from the XML code for all fields following PICT export. |
| TFS #2102 | Fixed the defect where the Active column for the Coursework.Repeat field was set to TRUE, causing issues with form validation. The Active column is now set to FALSE by default for the Coursework.Repeat field. |

Known Issues

Issue: Multiple instances executing Export can run into an issue with Deadlocked Transactions which can cause loss of data in the Visibility tables.

Workaround: Only enable one instance of Export per RTS Machine per Project.

Release 2.0 (August 2015)

General Notes

This document, the Release Notes for Perceptive Intelligent Capture for Transcripts (PICT) 2.0.2000, contains descriptions of enhancements and updates identified by Customers, Support, and the Professional Services implementation teams.

Compatibility

You can only use Version 2.0.2000 with Intelligent Capture version 5.6 SP1 with TTE add-on, or 5.6 SP2.

New Features

| Category | Description |
|----------------------|---|
| Validation | Enhanced Grade Point Validation: Grade Points only allow numeric values. |
| Extraction | HS Transcript Coursework Extraction: This is a major feature introduced in this release. The previous version of the solution supported header level extraction for High School transcripts, but no course detail extraction. |
| Enhanced TTE version | <p>Improvements of Transcript Engine in Add-on Build 5561</p> <p>The following improvements have been implemented in the build 5561 of the transcript engine:</p> <p>New “Unknown” column type of the transcript columns is now available for both College and High School transcript types. This column type helps to unmap a data column from being a transcript column (previously you would need to delete the target column first and then recreate and move it afterwards).</p> <p>For College transcripts, the 6th transcript column type “Grade Points” was unsupported in the version 5560 of the add-on. This issue has been addressed in version 5561 and “Grade Points” is now available in the transcript column selection drop down list.</p> <p>The patch included a number of important general stabilization of GUI and data storage routines related to transcript engines (both High School and College).</p> <p>For High School transcripts, in case some of the columns are not mapped in the GUI but effectively extracted by the engine, the system now extracts the data into so-called “unmapped” columns of the table data control.</p> |
| Validation | Enhanced Course ID Validation: PICT calculate a Levenshtein distance for courses available in the Coursework database and automatically replace the erroneous field if it meets a certain tolerance. |

| Category | Description |
|-------------------------------|---|
| Unmapped Column Support | <p>Unmapped Column Support for Transcript Coursework:</p> <p>If a data column is effectively extracted by the High School transcript engine but it is not explicitly mapped to a table control column in the GUI, the system previously would lose this information. In the add-on build 5561, it now stores this data in the so-called “unmapped” columns of the data control. These unmapped columns can be accessed from within the PIC custom script and then either analyzed for further processing or even directly mapped to one of (or more) the existing reserved columns of the data control.</p> |
| Invalid rows in Coursework | <p>Remove invalid rows from Coursework: Sometimes the engine will extract header lines within the table and additional rows beneath the table. Post-extraction, these additional rows are now systematically removed so that only true Coursework rows are presented for verification and exported.</p> |
| Empty Grade Column Validation | <p>Empty Grade Column Validation: Often times, not all 5 grade columns are present on a Transcript. If all empty cells are presented for verification, this could cause unnecessary Enter key presses. It is now possible to validate a column of grades in Coursework Validate from RTS.</p> |
| Configuration | <p>Dynamic Coursework Column Display: Some customers do not require all of the columns we extract from the Coursework table. In order to alleviate additional verification times, these columns can be set to blank in Document Validate on RTS. Additionally, the column is not visible in Verifier. This setting is driven by the Active column in BRWFLD.</p> |
| Configuration | <p>Configurable Coursework Column Settings via BRWFLD: College and HighSchool Coursework columns formatting and validation are now configurable via BRWFLD like header fields so that we have only one configuration location.</p> |
| Configuration/Settings | <p>Header fields now use BRWFLD validation and format settings.</p> |
| Form/Configuration | <p>Dynamic Verifier Form: BPO or large customers may process multiple client's document through the solution. These clients may have different field requirements from other clients. The system can now dynamically adjust the Verifier form based on Active fields within BRWFLD.</p> |
| Configuration/Validation | <p>Ability to turn on/off Cumulative GPA Calculation Validation: Ability to disable the GPA calculation validation and/or automatically override the invalid GPA within Verifier so that documents which do not calculate do not stop for verification of the GPA field when it is not required.</p> |
| Configuration/Export | <p>Configurable option to exclude non-issuing institution courses in export process (Transfer coursework)</p> |
| OCR Page counting | <p>Modified OCR Page Counting: If a document is processed again the OCR pages are incremented instead of just storing the last page count.</p> |
| Configuration | <p>Configurable Option to buffer Client Settings: A configurable option to buffer client settings so that in a single or static client environment, the Verifier form loads faster, or in a multi-client or evolving environment, we can reload the Verifier form on each batch load.</p> |
| Verification | <p>Submitting Student ID populates Student Address on Verifier Form: We can now type in the Student ID number, press enter, and all respective fields would be updated including the address.</p> |

| Category | Description |
|---------------|---|
| Verification | HS Test Scores: There are 3 sections for test scores. SAT, ACT and Other test scores. You have the ability to add or remove rows for each section. |
| Export | PDT XML Export: Ability to export data via XML to Perceptive Data Transfer. |
| Export | Normalized Term Export: Semester/Quarter Terms are now normalized for export in order to achieve better analytics against the exported data. |
| Extraction | HS Field Optimizations based on Validated Data: Field level extraction rates for HS documents are lower than the College ones. Important improvements have been made to field and column extraction to improve the FLE rates. This is a continuing effort and the next version of the solution should offer better FLE rates. |
| Validation | Total Credits Earned- Internal Validation: An internal validation logic on total credits earned have been implemented to minimize false positives. |
| Verification | Ability to enter the Grade as stated on the transcript regardless of the Accepted Grades listed in the database configuration. |
| Validation | Auto validation of Scores Tables when the first column is blank in Verifier. |
| Extraction | Multi Page HS Transcript Optimization: First round of the optimization efforts allowing multi page transcripts to extract as well as single page transcripts. This is a continuing effort; the next release should offer better extraction capabilities for multi-page transcripts. |
| Configuration | Ability to encrypt the INI file connection strings password. |
| Validation | A button is now available on the form to enable the validation of all remaining cells in the Coursework table. |
| Licensing | Ability to process HS Transcript header data without TTE License: Customers can now process College transcripts, Military transcripts, along with High School header data and test scores without licensing HS TTE. |

Fixed Defects Build 1.3.1304 to build 2.0.2000

| ID | Description |
|---------------------|---|
| DE40052 | fnWriteXMLField does not replace existing XML element, creates a duplicate entry. |
| DE40053 | fnWriteXMLField creates XML element outside of the intended parent tag. |
| DE41653 | Demo code removed from project could affect extraction results. |
| DE41655 | Code to clean up SQL for Oracle transactions were inadvertently uppercasing data, causing failures. |
| DE44533 and DE44534 | Component mapping for applicant ID and Site ID in filename was not correctly being extracted during import. |
| DE45057 | Accepted Grade Letters in College were not being validated against database settings. |
| DE45234 | Specially formatted dates were extracting incorrectly in some cases. |
| DE46106 | Graduation Date for High School does not honor field settings when not extracted. |
| DE46156 | ASE Pool lookups should provide better diagnostic logging if AlphaNum setting for pool does not match ASE pool data. |
| DE46189 | fnReporting error when attempting to use the DATEADD function using an Oracle database will cause DATESTART columns to remain null. |

Known Issues

Issue: Multiple instances executing Export can run into an issue with Deadlocked Transactions which can cause loss of data in the Visibility tables.

Workaround: Only enable one instance of Export per RTS Machine per Project.

Release 1.3.1303 (November 2014)

General Notes

This document, the Release Notes for Intelligent Capture for Transcripts (ICT) version 1.3.1303, contains descriptions of enhancements and updates identified by Customers, Support, and the Professional Services implementation teams.

Compatibility

You can only use Version 1.3.3 with Intelligent Capture version 5.5 SP2 or 5.5 SP3.

You can upgrade previous versions of Intelligent Capture for Transcripts to Version 1.3.1303 using the following steps.

1. Stop the Intelligent Capture Runtime Service and close all Intelligent Capture applications (Verifier and Designer).

2. Create a backup of existing project files (SDP, INI, ASE pools, and so on).
3. Create a backup of the ICT configuration database.
4. Execute the **1210To1300.sql**, **1300To1310.sql**, **1310To1312.sql**, and **1312To1330.sql** scripts on the ICT configuration database.
5. Configure the new columns within the IC configuration database as outlined in the [New Feature](#) section below.
6. Replace the existing SDP and INI files with the version 1.3.1303 SDP and INI files.
7. Update the new INI file with the settings from the backup INI file.
8. If any custom scripting was placed in the UserExits and GlobalVariables classes, copy the custom script from the backup project file to the version 1.3.1303 project file.
9. Update the Class Name Format and the Fields Contents Format in both Applicant and Institution ASA pools in Designer, unless their default format is preferred.
10. Start the Runtime Service. Reset all batches that were not exported to state 200.

New Features

| Category | Description |
|--|--|
| Enhanced Support for Sailor/Marine Corps Transcripts | Perceptive Intelligent Capture for Transcripts 1.3.1303 has been optimized to extract more line item details from Sailor/Marine transcripts. |
| New Support for Military Joint Service Transcripts | Perceptive Intelligent Capture for Transcripts 1.3. 1303 now processes military Joint Service Transcripts. |
| Enhanced ASE Search | The Associative Search Engine area is now configured based on document class to return better results for both Applicant and Institution searches. Additionally, the applicant search now utilizes the Student Name when found on the transcript to return better results. |
| Enhanced Performance on Dialog Load Times | Perceptive Intelligent Capture for Transcripts 1.3.1303 has enhanced its performance by decreasing applicant and institution dialog search load times. |
| Cumulative GPA Export | Perceptive Intelligent Capture for Transcripts 1.3.1303 supports export of cumulative GPA on college transcripts. |

Fixed Defects

| ID | Description |
|---------|--|
| DE39045 | When the document file name was over 50 characters, extracted coursework would not write to the Visibility reporting database. This was corrected so that all coursework data is now reported. |

Release 1.3.1302 (August 2014)

General Notes

This document contains information about the installation and configuration of an Oracle database for Perceptive Intelligent Capture for Transcripts.

Compatibility

Perceptive Intelligent Capture for Transcripts 1.3.1302 is only compatible with Perceptive Intelligent Capture version 5.5 SP2.

The supported Oracle Database version is 11g Release 2.

Prerequisite

Before installing Perceptive Intelligent Capture for Transcripts 1.3.1302, you must install and configure Oracle Data Access Components (ODAC) 11.2 Release 4 with Oracle Developer Tools for Visual Studio version 11.2.0.3.0.

Installation

To upgrade previous versions of Perceptive Intelligent Capture for Transcripts to 1.3.1302, complete the following steps.

1. Stop the **Intelligent Capture Runtime Service** and close all **Intelligent Capture** applications, including **Verifier** and **Designer**.
2. Create a backup of the existing **SDP** and **INI** files.
3. Create a backup of the **ICT configuration database**.
4. Replace the existing **SDP** and **INI** files with the version **1.3.1302 SDP** and **INI** files.
5. Update the new **INI** file with the settings from the backup **INI** file created in step 2.
6. If the **UserExits** and/or **GlobalVariables** classes contain any custom scripting, copy the custom script from the backup INI file to the **1.3.1302** project file.
7. If you are creating a new database for **SQL Server**, complete the following substeps.
 1. In the **Create** directory, open the **MasterICT.sql** script.
 2. In **Section 1.0**, uncomment out the **Create database section** in the script and change the database name from **TargetDatabase** to the name that is applicable for your database.
 3. Run the **MasterICT.sql** script.
 4. On the **ICT configuration database**, execute the **1301To1312.sql** script.
8. If you are performing an update for **SQL Server**, complete the following substeps.
 1. Open **SQL Server Management Studio**.
 2. In the **Update** directory, open each file in order.
 3. In the **Available Database** list, select the current **Transcripts** database.
 4. Run the update scripts in order.

9. For the new **Oracle database**, complete the following substeps.
 1. In the **Create** directory, open the **MasterICT.sql** file.
 2. In **Section 1.0**, review the commented out section for creating users.
 3. If needed, create a user and grant the appropriate user permissions.
 4. Log in as the newly created user.
 5. Run the **MasterICT.sql** script.
10. Reset all of the batches that have not been exported to `state 200`.
11. Restart the **Intelligent Capture Runtime** service.

New Feature

| Category | Description |
|---|---|
| New Configuration Option – Support for an Oracle database | Perceptive Intelligent Capture for Transcripts 1.3.1302 supports the use of an Oracle database. |

Release 1.3.1301

General Notes

This document, the Release Notes for Perceptive Intelligent Capture for Transcripts (ICT) version 1.3, contains descriptions of defect corrections and software extensions identified by Customers, Support, and the Professional Services implementation teams.

Compatibility

Version 1.3 can only be used with Intelligent Capture version 5.5 SP2.

Previous versions of Intelligent Capture for Transcripts can be upgraded to **Version 1.3** using the following steps:

1. Stop the Intelligent Capture Runtime Service and close all Intelligent Capture applications (Verifier and Designer)
2. Create a backup of existing project files (.sdp, .ini, ASE pools, etc)
3. Create a backup of the ICT configuration database
4. Execute the “1210To1300.sql” script on the ICT configuration database
5. Configure the new columns within the ICT configuration database as outlined in the New Features section below
6. Replace the existing .sdp and .ini files with the version 1.3 .sdp and .ini files
7. Update the new .ini file with the settings from the backup .ini file
8. If any custom scripting has been placed in the UserExits and/or GlobalVariables classes, copy the custom script from the backup project file to the version 1.3 project file
9. Reset all batches that have not been exported to state 200.
10. Restart the Intelligent Capture Runtime Service.

New Features

| Category | Description |
|--|--|
| New Configuration Option – College Course Number Export | <p>College coursework export has been updated to export the Subject and Course Numbers separately for courses that successfully validated against the SIS coursework data. Two new columns have been introduced in the BRWCRS table:</p> <ol style="list-style-type: none"> 1. SubjectColumn – Column in the database table which holds the SIS course subject. 2. CourseNumberColumn – Column in the database table which holds the SIS course number. <p>Coursework lines, which were not successfully validated, will be exported with the Course Number extracted from the document in both the Subject and Course Number sections of the XML. If either of the columns above is blank within the ICT configuration database, the new export logic will not be enabled.</p> |
| New Configuration Option – Applicant Custom Values | <p>Applicant data can now contain up to five custom values to be included in the export. These values are passed through the columns within the ApplicantASE pool. Five new columns have been added to the BRWSRA table for mapping these custom values from the ApplicantASE pool:</p> <p>Custom1-Custom5 – Capture ASE column name denoting the custom value that can contain additional information about the applicant</p> <p>Additionally, five rows have been added to BRWEXPStudentHeader allowing mapping of the Custom fields to XML tags. The default tag names are userField1-userField5.</p> |
| New Configuration Option – Filtering College Coursework for Export | <p>Extracted College coursework lines can now be filtered for export by grade letter. Two new columns have been introduced in the BRWEXP table:</p> <ol style="list-style-type: none"> 1. EXPFiltering – Flag to indicate that whether the exported courses will be filtered. If set to TRUE, the exported courses will be filtered based on the value of EXPExcludedGradeLetters column. Otherwise, the exported courses will not be filtered. The default value for this column is FALSE. 2. EXPExcludedGradeLetters – Comma separated list of grade letters that will be filtered out from export files. This setting only applies if the EXPFiltering column is set to TRUE. If the value of the field is set to empty string, no course will be filtered out. The default value for this column is "W,I". |

| Category | Description |
|--|--|
| New Configuration Option – Cumulative GPA validation for College Transcripts | <p>Validation of the CumulativeGPA field for College transcripts has been expanded to validate mathematically the extracted value against the calculated GPA based on the coursework data. Two new columns have been introduced in the BRWGRD table:</p> <ol style="list-style-type: none"> 1. GPAValidationTolerance – The decimal tolerance that is acceptable between the Calculated GPA derived from the extracted coursework and the Cumulative GPA. 2. ExcludedGradeLetters – Comma separated list of grades to exclude when calculating the GPA. <p>Additionally, four new invalid reasons have been added to BRWIVRType.</p> <ol style="list-style-type: none"> 1. CUMULATIVE GPA <> CALCULATED GPA – This invalid reason can be selected by a Verifier user to allow a document to be exported if the Cumulative GPA does not match the calculated GPA within the configured tolerance. 2. GPA AND APPLICANT INVALID – This invalid reason can be selected by a Verifier user to allow a document to be exported if the Cumulative GPA does not match the calculated GPA within the configured tolerance and the transcript applicant cannot be found using the applicant search function. 3. GPA AND INSTITUTION INVALID – This invalid reason can be selected by a Verifier user to allow a document to be exported if the Cumulative GPA does not match the calculated GPA within the configured tolerance and the institution issuing the transcript cannot be found using the institution search function. 4. GPA, INSTITUTION, APPLICANT INVALID – This invalid reason can be selected by a Verifier user to allow a document to be exported if all three of the following conditions apply: <ol style="list-style-type: none"> a. The Cumulative GPA does not match the calculated GPA within the configured tolerance b. The institution issuing the transcript cannot be found using the institution search function. c. The transcript applicant cannot be found using the applicant search function. |
| UI Update – Institution Search Dialog | The results displayed within the Institution Search Dialog have been expanded to include the Institutions' State, City, and Address1. |

Fixed Defects

| ID | Description |
|-----|--|
| NA | Corrected issue where ApplicantID exported as blank when ExternalID was null in database configuration. (Build 1301) |
| N/A | Corrected documentation issue regarding RTS settings for Update System Security event. (Build 1301) |