

# Brainware for Transcripts

## Installation and Setup Guide

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## About Brainware for Transcripts

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

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

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

## Installation Process

You can install Brainware for Transcripts automatically or manually. For automatic installation, you need to use the BFT Installer.

### Automatic Installation

You can use the Installer to automatically install Brainware for Transcripts.

### About Brainware for Transcripts Installer

The Brainware for Transcripts installer installs Brainware for Transcripts (BFT) 2.4.x on a server with Brainware Intelligent Capture 5.8.1 or higher running on it. The installer automates the following tasks:

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

#### **Note:**

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

## Software Prerequisites

### Brainware Intelligent Capture

The Brainware for Transcripts installer requires Brainware Intelligent Capture 5.8.1 or higher and must be executed on a server with Intelligent Capture Runtime Server. Refer to the Brainware Intelligent Capture Installation Guide for installation instructions.

**Note:**

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

### Microsoft .NET Framework 3.5 SP1

Brainware For Transcripts needs .NET Framework 3.5 SP1 to run. Prior to executing the installer, it must be ensured that the server has .NET Framework 3.5 SP1 installed.

### Installation and Setup Process

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

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

### Run the Installation Wizard

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

The Brainware for Transcripts installer must be run as an administrator. When you run the installer, it checks for an existing installation of BFT. If it finds any existence of BFT, it throws a warning message. You must acknowledge the warning message, abort the installation and manually uninstall BFT before continuing with the installer.

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

To run the installer, complete the following steps.

1. Run the **Brainware\_Transcripts\_Solution.exe** as administrator.

**Note:**

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

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

### **Define an Installation Directory**

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

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

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

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

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

### **Create a Database**

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

## Define Database Connections

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

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

To define database connections, complete the following steps.

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

### Note:

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

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

### Note:

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

## Runtime Servers

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

- Number of OCR, Classification, and Extraction (OCE) RTS Instances. By default, this number is the number of available cores on the server-1 for processing most documents as quickly as possible; however, this number can be lowered, if needed.
- Limit Batch Size - This option allows you to limit the number of documents imported into a Brainware Intelligent Capture batch. The Import RTS instance is configured to poll for sub-directories and any sub-directory with more than this number of files is split into multiple batches based on the number defined. The default setting is 10 documents.

- Clean Up Batch Time Limit (hours) - The Export instance is automatically configured by the installer to perform clean-up of old batches. You can define the amount of time which must pass after successful export of the batch before clean-up of the batch is executed and the batch is deleted. The default setting is 240 hours.
- Job Name - You can define the Database Job name where the RTS instances are performing their work. This value defaults to the Project file name defined on the **Installation Directory** screen.
- Auto System Update Time - The Import instance is automatically configured by the installer to perform updates to the Associative Search Engine pools every 24 hours. You can define the time when this update should occur. The default is 12:00 AM local server time.

During the installation, the Runtime Manager service is restarted.

### Complete the Installation

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

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

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

### Uninstall Brainware for Transcripts

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

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

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

## Manual Installation

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

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



- Create Brainware for Transcripts folder structure
- Installing Brainware for Transcripts project file manually.
- Install the Transcript Table Extraction engine.
- Configuration database and INI file settings.
- Configure data export.
- Set up and add clients.
- Create institution or applicant master partitions, or create identification fields without using a partition.
- Set up business rules relating to predefined data fields and document types.
- Activate the Dynamic Verifier Form.
- Set up users.
- Set up review states.
- Create a connection to Brainware Visibility.
- Install and configure the Brainware for Transcripts Connector. For more information. For details about the Brainware for Transcripts Connector, refer to the Brainware Transcript File Drop Connector 6.7 Installation Guide available in the Hyland Product Documentation website.

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

## About preparing to install Brainware for Transcripts

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

- Completed the recommended registry and configuration settings.
- Installed one of the following Brainware Intelligent Capture versions:
  - 5.7 Service Pack 1 and Hot Patch for Transcript engine build 5723
  - 5.8
  - 5.9

### **Note:**

In order to experience improved extraction results, especially for text-based PDFs, it is recommended that you upgrade to a BIC version higher than BIC 5.7 or have BIC 5.7 with HotPatch 5723 installed.

- Obtained and installed a Brainware Intelligent Capture license file. This file is located in the <InstallDir>\Components\Cairo directory.
- Obtained the Brainware for Transcripts installation files.

## Download the installation files

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

## About the database configuration table creation script

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

## Create configuration tables for SQL

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

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

### Note:

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

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

### Note:

This prevents the existing database table from being overwritten.

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

## Create configuration tables for Oracle

### Prerequisite

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

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

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

### Note:

This prevents the existing database table from being overwritten.

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

## Create the Pool directory

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

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

## Install Brainware for Transcripts project files

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

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

### Note:

In this document, the INI file is referred to as `<project>.ini`.

## Create the Brainware for Transcripts folder structure

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

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

## Upgrade Procedure for Brainware for Transcripts

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

### Database upgrade for SQL

#### Prerequisite

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

- Brainware Intelligent Capture
- Brainware for Transcripts (BFT)
- Solution Migration Tool

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

1. Backup the Project files (sdp) and Train folder(s) in the environment. If unsure of project locations or count, open each instance and note each project path and filename.
2. Stop all services and make sure all users are logged out.
3. Take a backup of the Brainware for Transcripts Configuration Database.
4. In the **Configuration** section, set the value for the **@DB\_Name** variable parameter to the database catalog that will contain the BFT configuration tables.
5. Set the value for the **SCRIPT\_MODE** variable parameter to **UPDATE**.
6. Run the **MasterBFT.sql** script.
7. Refer to the steps mentioned in the latest version of the [Solution Migration Tool User Guide](#) in order to begin upgrading.

### Database upgrade for Oracle

#### Prerequisite

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

- Brainware Intelligent Capture
- Brainware for Transcripts (BFT)
- Solution Migration Tool

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

1. Backup the Project files (sdp) and Train folder(s) in the environment. If unsure of project locations or count, open each instance and note each project path and filename.
2. Stop all services and make sure all users are logged out.

3. Take a backup of the Brainware for Transcripts Configuration Database.
4. In the **Configuration** section, set the value for the `SCRIPT_MODE` variable parameter to `UPDATE`.
5. Run the **MasterBFT.sql** script.
6. Refer to the steps mentioned in the latest version of the [Solution Migration Tool User Guide](#) in order to begin upgrading.

## Solution Configuration Manager - Tasks To Do

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

SCM requires the installation of the corresponding BFT SCM package. You must ensure that the correct SCM package for BFT (in this case, version 2.4) is installed. You need to ensure this, regardless of whether you are installing SCM for the first time or if you are upgrading BFT.

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

## Configure dialog box settings for the Verifier Thin Client

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

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

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

### Example

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

4. Save and close the file.