Perceptive Transcript eForm

Installation Guide

Version 1.0.x
Compatible with ImageNow versions: 6.6.x to 6.7.x

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Table of Contents

Perceptive Transcript eForm overview

Perceptive Transcript eForm provides the ability to enter, edit, and process transcript content with ImageNow. The eForm is commonly used as part of the Intelligent Capture for Transcripts solution. It displays in ImageNow Viewer alongside the original transcript, giving your users the ability to validate the original transcript data.

The eForm iScript also allows you to export the captured data for use in another process or Student Information System (SIS).

Prerequisites

Before you install Perceptive Transcript eForm, you must install and have access to ImageNow Server and Client, 6.6.x or higher on the target network.

Active-active server environments

An active-active server environment has at least two active instances running at the same time: a primary instance and a secondary instance. Each instance of ImageNow Server runs independently of the other. Install Perceptive Transcript eForm on the primary server instance.

For more information about active-active environments, refer to the *ImageNow High Availability Overview Technical Guide* and the *ImageNow Server and Client Installation and Setup Guide*, available in the Perceptive Software Customer Portal, on the Product Documentation tab.

Note For an active-active server environment, you must run ImageNow, 6.7.0.2717 or higher.

Install the Transcript eForm

The PerceptiveTranscriptEForm.zip includes the directories and files you need to install the eForm. It also includes the iScript that exports eForm data.

Download and extract the files

To download the ZIP folder and extract the files, complete the following steps.

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log in to the Customer Portal.

2. In the **Product Downloads** page, search for **PerceptiveTranscriptEForm.zip**.

3. Download the file to a temporary directory on your computer.

4. Extract the ZIP folder within the temporary directory.

5. Optional. To use the iScript that exports eForm data, in your temporary directory, navigate to the **\script** folder and copy the **EDU_ExportTranscriptEFormToXML.js** file to **[***drive***:]\inserver6\script**.

Note You do not need to move the **data_definition** and **presentation** folders.

Install the eForm

To install and configure the Transcript eForm, complete the following steps.

1. In **Management Console**, click **Forms**.

2. To add the eForm components, in the **Forms** pane, click **Manage Form Components**, and complete the following substeps.

    1. To add the eForm data definition, in the **Manage Form Components** dialog box, in the left pane, click **Data Definitions** and click **Add**.

    2. In the **Select XML File** dialog box, navigate to your temporary directory, under **\data_definition**, click **EDU_PerceptiveTranscript.xml**, and click **Open**.

    3. To create the eForm presentation, in the **Manage Form Components** dialog box, in the left pane, click **Presentations** and click **Create**.

    4. Type any name and press **Enter**, such as **EDU_Transcript**. In the right pane, click the presentation you just created and click **Modify**.

    5. In the **Presentation** dialog box, in the left pane, click **Files** and click **Add**.

    6. In your temporary directory, navigate to the **presentation** folder, select all files, and click **Open**. In the **Presentation** dialog box, click **OK**.

    7. In the **Manage Form Components** dialog box, click **OK**.

3. To create the eForm, in **Management Console**, on the **Forms** tab, click **New** and type a name for the eForm, such as **EDU_Transcript.**

4. To configure the eForm, click the form you just created and click **Modify**.

5. In the **Form** dialog box, complete the following substeps.

    1. In the left pane, click **Components**.

    2. Under **Data Definition**, in the **Data definition** list, click **EDU_PerceptiveTranscript.xml**.

    3. Under **Presentations**, click **Select.**

    4. In the **Select Presentations** dialog box, click the presentation you created above**,** and click **OK**.

    5. In the **Form** dialog box, click **OK**.

Configure the eForm iScript for data exports (optional)

The eForm iScript exports transcript data into an XML file that you can import into another process or SIS. To configure the eForm for data exports, review and complete the following tasks.

- [Configure an ImageNow workflow process](#)
- [Configure the iScript to export transcript data](#)

Configure an ImageNow workflow process

The eForm export process requires three work queues in your ImageNow workflow process.

To configure an existing workflow process, complete the following steps.

1. In **Management Console**, in **Workflow**, open the workflow you want to configure.

2. In the **ImageNow Workflow Designer** window, create and name the following three **Work** queues.

    - A transcript export queue, such as **Export eForm Data**.
    - An export success queue, such as **Export Success**.

- An export failure queue, such as **Export Failure**.

3. To attach the eForm iScript in ImageNow 6.6 environments, complete the following substeps.

   1. Double-click on the transcript export queue, such as **Export eForm Data**.
   2. In the **Queue Properties** dialog box, in the left pane, click **Actions**.
   3. In the right pane, on the **Inbound** tab, in the **iScript** list, click **Edit iScripts**.
   4. In the **Select iScripts** dialog box, click **Add**.
   5. In the **Select iScripts** dialog box, click **EDU_ExportTranscriptEFormToXML.js** and click **OK**.
   6. In the **Select iScripts** dialog box, click **OK**.
   7. In the **Queue Properties** dialog box, in the right pane, on the **Inbound** tab, in the **iScript** list, click **EDU_ExportTranscriptEFormToXML.js** and click **OK**.

4. To attach the eForm iScript in ImageNow 6.7 environments, complete the following substeps.

   1. Double-click on the transcript export queue, such as **Export eForm Data**.
   2. In the **Queue Properties** dialog box, in the left pane, click **Actions**.
   3. In the right pane, on the **Inbound** tab, in the **Action** list, click **Edit Actions**.
   4. In the **Action Settings** dialog box, on the **iScript** tab, click **Add**.
   5. In the **Select iScripts** dialog box, click **EDU_ExportTranscriptEFormToXML.js** and click **OK**.
   6. In the **Action Settings** dialog box, click **OK**.
   7. In the **Queue Properties** dialog box, in the right pane, on the **Inbound** tab, in the **Action** list, click **EDU_ExportTranscriptEFormToXML.js** and click **OK**.

5. To create sequential routes from the transcript export queue to the export success and export failure queues, complete the following substeps.

   1. In **Workflow Designer**, in the **Task Pane**, click **Routes**.
   2. On the **Grid** toolbar, click **Normal Routes**.
   3. In the **Routes** pane, click **Sequential**.
   4. Drag a route from the transcript export queue, such as **Export eForm Data,** to the export success queue, such as **Export Success**.
   5. Drag a route from the transcript export queue, such as **Export eForm Data,** to the export failure queue, such as **Export Failure**.

6. Optional. To incorporate the work queues into your existing workflow process, create additional routes.

7. Close **Workflow Designer** and **Management Console**.

Configure the iScript to export transcript data

To configure the eForm iScript to export transcript data, complete the following steps.

Note All entries are case-sensitive.

1. Navigate to **[*drive:*]\inserver6\script** and open the **EDU_ExportTranscriptEFormToXML.js** file with a text editor.

Note Run the text editor as an administrator, if required.

2. To map the transcript data to a student, set **define IDX_STUDENT_ID** with an ImageNow index key or document key.

    - To map ImageNow 6.6 environments, use **folder**, **tab**, **f3**, **f4** or **f5**.

    - To map ImageNow 6.7 environments, use **field1**, **field2**, **field3**, **field4** or **field5**.

3. To map the eForm name, set **define EFORM_NAME** to the eForm name you created in <u>Install the eForm</u>.

4. To map the export failure queue, set **define QUEUE_ERROR** to the export failure queue name you created in <u>Configure an ImageNow workflow process</u>.

5. To map the export success queue, set **define QUEUE_COMPLETE** to the export success queue name you created in <u>Configure an ImageNow workflow process</u>.

6. To map the directory to receive the transcript data, set **define EFORM_EXPORT_DIR** to a valid path, such as **[*drive:*]\inserver\\log**.

7. To activate the iScript, set **define CONFIG_VERIFIED** to **true**.

8. Save and close the **EDU_ExportTranscriptEFormToXML.js** file.

Sample EDU_ExportTranscriptEFormToXML.js file

The following example shows a configured iScript file.

```
Configuration          *****************
// Index Keys 6.7, 6.8 and 7+ (Valid Options: "field1", "field2" "field3", "field4",
"field5")
// Index Keys 6.6 Valid Options: ( "folder", "tab", "f3", "f4", and "f5" )
// FYI: you can use the 6.6 keys  with higher  versions.
#define IDX_STUDENT_ID                   "f4"

//eForm Name
#define EFORM_NAME                   "EDU_Transcript"

//Workflow Queue Name(s)
#define QUEUE_ERROR                   "Export Failure"
#define QUEUE_COMPLETE                   "Export Success"

//Export File Configuration
#define EFORM_EXPORT_DIR          "c:\\inserver\\log\\"

// set to true when configuration values have been verified
//#define CONFIG_VERIFIED                   true
#define CONFIG_VERIFIED                   true
```

Administer the eForm

For more information on administrating an eForm, refer to the *eForms Getting Started Guide 6.6.x* or the *ImageNow eForms Getting Started Guide 6.7.x*.

You may want to complete additional tasks, such as the following.

- Delete an eForm

- Associate a form with a workflow queue

- Assigning privileges

Review error messages

Brief error messages accompany transcripts routed to the export failure queue.

To view the error logs, navigate to
[*drive*:]\inserver6\log\EDU_ExportTranscriptEFormToXml_<yyyymmdd>.log and and open a log file in a text editor.

Index