Perceptive Transcript eForms

Installation and Setup Guide

Version: 1.1.x

Written by: Product Knowledge, R&D
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What is Perceptive Transcript eForms?

Perceptive Transcript eForms provide the ability to enter, edit, and process transcript content with ImageNow. The Transcript eForm is commonly used as part of the Intelligent Capture for Transcripts solution. It displays in ImageNow Viewer alongside the original transcript, giving users the ability to validate the original transcript data. The Course Equivalency Review eForm allows you to process university transcripts to transfer credits from an external institution to an equivalent course in your institution.

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

Transcript eForms help you manage the following types of transcripts.

- High school transcripts
- University transcripts
- Military transcripts

For university transfers, you can compare incoming transcripts against an articulation system or a rule engine to find equivalent courses and, if required, update the articulation system or rule engine.

Prerequisites

Before you install Perceptive Transcript eForms, you must install and have access to the following software.

- ImageNow Server, version 6.7.x or Perceptive Content Server, version 7.0.x.
- ImageNow Client, version 6.7.x or Perceptive Content Client, version 7.0.x.
- Perceptive Intelligent Capture, version 5.5 SP 3
- Perceptive Intelligent Capture for Transcript, version 1.3.0.1304

About 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 eForms 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 eForms

The PerceptiveTranscripteForms.zip file includes the directories and files you need to install the Transcript eForm and Course Equivalency Review eForm. It also includes the iScript to export data and check equivalent courses from an articulation system or rule engine.

Download and extract the files

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 **PerceptiveTranscripteForms1.1.1.x.zip**.

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

4. Extract the ZIP file in a new folder within the temporary directory and complete the following steps.

   1. Extract the **transcript.eform-1.1.1.zip** file within the same folder.

   2. Optional. To use the iScript that exports eForm data, in your temporary directory, navigate to the **transcript.eform\script** folder and copy the **EDU_ExportTranscriptEFormToXML.js** file to the [*drive*:]**\{inserver directory}\script** directory.

      Note In ImageNow 6.7.x, the inserver directory is **inserver6** and in Perceptive Content 7.0.x, the inserver directory is **inserver**.

   3. To use iScripts that enable Perceptive Intelligent Capture to process university transcripts, navigate to the **transcript.process\script** folder and copy the iScripts in the **[*drive*:]\{inserver directory}\script** directory.

   4. To use iScripts for course equivalency, in your temporary directory, navigate to the **transcript.review.eform\script** folder and copy the iScripts to the [*drive*:]**\{inserver directory}\script** directory.

   5. Copy **STL (Standard Library)** from the **transcript.review.eform\script** folder to the [*drive*:]**\{inserver directory}\script** directory.

   6. Navigate to the **transcript.process\etc\transcripts** folder and copy the XML files to the [*drive*:]**\{inserver directory}\etc\transcripts** directory and the folders of Transcript eForm and Course Equivalency Review eForm in the **[*drive*:]\{inserver directory}\form** directory.

   7. Configure the XML files. Refer to Configure BW_Config.xml and Configure Transcript eForms configuration files.

   8. For a new installation, continue with the installation steps specified under Install Transcript eForms. To upgrade your existing Transcript eForms version, refer to Upgrade Transcript eForms to version 1.1.1.

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

Install Transcript eForms

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 then click **Open**.

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

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

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

   6. In your temporary directory, navigate to the **presentation** folder of transcript eForm, 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.

   Notes

   - It is recommended that you type the name as `Transcript` since this name is used in various internal files. If you type any other name, you must replace **Transcript** with your preferred name in the **BW_TranscriptExportDoc.js**, **BW_TranscriptTransfer.js**, **EDU_ExportTranscriptEFormToXML.js**, and **EDU_Merging.js** files against the `TRANSCRIPT_EFORM_NAME` property. You can open these files from the **[*drive*:]/{inserver directory}/script** directory.

   - In the **Transcript_Config_Univ.xml** file add `Transcript` to the TRANSCRIPT_EFORM_NAME tag. You can open this XML file from the **[*drive*:]/{inserver directory}/etc/transcript** directory.

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**.

Install Course Equivalency Review eForm

While evaluating transcripts for equivalent courses, if the system encounters a missing equivalency or multiple equivalencies, ImageNow creates an empty document with an eForm for review, which contains the course details for courses for which the system finds either multiple equivalencies or no equivalency. This eForm is called the **Course Equivalency Review eForm**.

To install and configure the **Course Equivalency Review 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_CourseEquiv.xml**, and click **Open**.

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

   4. Type any name, such as **EquivalencyReview**, and press **Enter**. 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 then click **Add**.

   6. In your temporary directory, navigate to the **presentation** folder of course equivalency review, 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 **EquivalencyReview**.

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_CourseEquiv.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**.

Upgrade Transcript eForms to version 1.1.1

You can upgrade your existing PerceptiveTranscript eForms to version 1.1.1.

Note If you have customized your version of Transcript eForms or installed custom scripts, you are not able to upgrade to version 1.1.1. To upgrade to PerceptiveTranscripteForms, version 1.1.1, contact your Perceptive Software representative.

Prerequisites

Ensure that you have closed the Perceptive Content Server before you upgrade the application.

Steps to upgrade Transcript eForms

To upgrade PerceptiveTranscripteForms to version 1.1.1, complete the following steps.

1. Download and extract the **PerceptiveTranscripteForms-1.1.1.x.zip** file and follow the steps in the Download and extract the files section.

2. Open the **form** folder and search for the **theForm.xsl** file in the folders you extracted.

3. Open the **theForm.xsl** file and search for **<*title*>Perceptive Transcript eForm<title>**.

   Note There can be multiple **form** folders on your system. You need to search for the unique **theForm.xsl** file with the title "**<*title*>Perceptive Transcript eForm<title>.**"

4. Navigate to the location where you downloaded the PerceptiveTranscripteForms-1.1.1 files.

5. Open the **PerceptiveTranscripteForms-1.1.1 > Presentation** folder.

6. Select and copy all the files excluding the following files.

   - **Transcript_Config_HS.xml**

   - **Transcript_Config_Military.xml**

   - **Transcript_Config_Univ.xml**

7. Paste the above files in the **form** folder on your local system where you located **theForm.xsl** file with the title as "**<*title*>Perceptive Transcript eForm<title>.**"

8. Log in to **ImageNow**.

9. Click **Manage** to display the **ImageNow Management Console** window.

10. In **Management Console**, in the left pane, click **Forms > Manage Form Components**.

11. In the **Manage Form Components** window, in the left pane, click **Presentations**.

12. In the **Presentation Name** column, click **Transcript > Modify**.

13. In the **Presentation** window, in the left column, click **Files > Add**.

14. In the **Select Files to add** window, navigate to the **PerceptiveTranscripteForm1.1.1.x\transcript.eform-1.1.1\presentation** folder you downloaded.

15. Select the **XML** files, click **Open** and then click **OK**.

16. Close the window.

Configure the eForm iScript for data exports

The eForm iScript exports transcript data into an XML file that you can import into another process or SIS. This is an optional process. To configure the eForm for data exports, complete the following procedures.

- 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 the left pane, click **Workflow**.

2. In the right pane, on the **Workflow** tab, click **New**.

3. In the **Add Process** dialog box, type the **Name** and **Description** of the process you want to create and click **OK**.

4. Select the workflow process and click **Modify**.

5. 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**.

1. To attach the eForm iScript in ImageNow 6.6 environments, double-click the transcript export queue, such as **Export eForm Data** and complete the following substeps.

   1. In the **Queue Properties** dialog box, in the left pane, click **Actions**.

   2. In the right pane, on the **Inbound** tab, in the **iScript** list, click **Edit iScripts**.

   3. In the **Select iScripts** dialog box, click **Add**.

   4. In the **Select iScripts** dialog box, click **EDU_ExportTranscriptEFormToXML.js** and click **OK**.

   5. In the **Select iScripts** dialog box, click **OK**.

   6. In the **Queue Properties** dialog box, in the right pane, on the **Inbound** tab, in the **iScript** list, click **EDU_ExportTranscriptEFormToXML.js** and then click **OK**.

2. To attach the eForm iScript in ImageNow 6.7 environments, double-click the transcript export queue, such as **Export eForm Data** and complete the following substeps.

   1. In the **Queue Properties** dialog box, in the left pane, click **Actions**.

   2. In the right pane, on the **Inbound** tab, in the **Action** list, click **Edit Actions**.

   3. In the **Action Settings** dialog box, on the **iScript** tab, click **Add**.

4. In the **Select iScripts** dialog box, click **EDU_ExportTranscriptEFormToXML.js** and then click **OK**.

5. In the **Action Settings** dialog box, click **OK**.

6. In the **Queue Properties** dialog box, in the right pane, on the **Inbound** tab, in the **Action** list, click **EDU_ExportTranscriptEFormToXML.js** and then click **OK**.

6. 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 left 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**.

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

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

Configure the iScript to export transcript data

You should configure the eForm 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*:]\{inserver directory}\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.

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

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

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

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

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

The following example shows a configured EDU_ExportTranscriptEFormToXML.js file in ImageNow 6.7.

```
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:\\inserver6\\log\\"

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

Configure ImageNow for course equivalency

You must configure ImageNow to use the eForm to check equivalent courses in incoming university transcripts. To configure the eForm for course equivalency, review and complete the following procedures.

- Create custom properties

- Create document type

- Create a drawer

- Configure an ImageNow workflow process

Create custom properties

You can map the student ID and the institution ID in the eForm to either ImageNow document keys or ImageNow custom properties. You should configure the student ID (also known as applicant ID) and the institution ID in BW_Config.xml.

Below is a list of custom properties that you should create in ImageNow.

Custom property name	Data type	Default value
Equivalency Status	Boolean	False
Equivalency Resolved	Boolean	False
Invalid Reason	String	

Note You should not modify any of the custom properties listed in the previous table.

Map Equivalency Status to the document type that you create for the Course Equivalency Review eForm. Map Equivalency Resolved to the document type that you create for the Transcript eForm. For more information, refer to the Create document type section.

For information on how to create a custom property, refer to "Create a custom property" in ImageNow Help.

Create document type

You must create the Transcript document type for Transcript eForm and Course Equivalency Review document type for Course Equivalency Review eForm and complete the following actions.

- You can select **Is a form** and in the **Form** list select the corresponding eForm name for each document type.

- Assign the **Equivalency Status** custom property to the **Course Equivalency Review** document type and the **Equivalency Resolved** and **Invalid Reason** custom properties to the **Transcript** document type. Refer to the Create custom properties section for information on custom properties.

For information on how to create a document type and assign a custom property to the document type, refer to "Create a document type" and "Assign a custom property to a document type", respectively, in ImageNow Help.

Create a drawer

You can map the document type to the Default ImageNow drawer or you can create a new drawer. For information on how to create a drawer, refer to "Create a drawer" in ImageNow Help.

Configure an ImageNow workflow process

The course equivalency process requires five work queues in your ImageNow workflow process.

To configure a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, click **Workflow**.

2. In the right pane, on the **Workflow** tab, click **New**.

3. In the **Add Process** dialog box, type the **Name** and **Description** of the process you want to create and click **OK**.

4. Select the workflow process and click **Modify**.

5. In the **ImageNow Workflow Designer** window, create the following **Work** queues.

   - A queue to add a document for pre-processing to select courses for equivalency checking and merging, such as **Pre Processing**.

   - A queue to check for equivalent courses, such as **Check Equivalencies**.

   - A queue for courses that are missing equivalent courses or have multiple equivalent courses, such as **Missing Equivalency**.

   - A queue for courses with matching equivalent courses, such as **Equivalencies Complete**.

- A queue to review courses that are missing equivalent courses or have multiple equivalent courses, such as **Course Equivalency Review**.

- A failure queue to route documents that failed to accept an equivalent course, such as **Course Equivalency Failure**.

- A queue to handle errors, such as **General Errors**.

6. Create work queues to handle invalid reasons from Perceptive Intelligent Capture. Refer to Configure workflow to handle invalid reasons for information on handling documents with these invalid reasons. You can create a single work queue to handle all invalid reasons or multiple queues as shown below.

- A queue to handle the invalid reason **APPLICANT NOT FOUND** from Perceptive Intelligent Capture.

- A queue to handle the invalid reason **INSTITUTION NOT FOUND** from Perceptive Intelligent Capture.

- A queue to handle the invalid reason **CUMULATIVE GPA <> CALCULATED GPA** from Perceptive Intelligent Capture.

- A queue to handle the invalid reason **GPA AND APPLICANT INVALID** from Perceptive Intelligent Capture.

- A queue to handle the invalid reason **GPA AND INSTITUTION INVALID** from Perceptive Intelligent Capture.

- A queue to handle the invalid reason **GPA, INSTITUTION, APPLICANT INVALID** from Perceptive Intelligent Capture.

- A queue to handle the invalid reason **INSTITUTION AND APPLICANT NOT FOUND** from Perceptive Intelligent Capture.

7. To attach the eForm iScript, complete the following substeps.

   1. Double-click the **Pre Processing** queue.
   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_Merging.js** and then click **OK**.
   6. In the **Select iScripts** dialog box, click **OK**.

8. To attach the eForm iScript, complete the following substeps.

   1. Double-click the **Check Equivalencies** queue.
   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_CourseEquivalency.js** and then 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_CourseEquivalency.js** and then click **OK**.

9. To assign eForms to the work queues, complete the following substeps.

1. Double-click a work queue.
2. In the **Queue Properties** dialog box, in the left pane, click **Forms**.
3. In the right pane, click **Add**.
4. In the **Select Forms** dialog box, in the **Available forms** box, select the Transcript eForms and click **Add**.
5. In the **Queue Properties** dialog box, click **OK**.

10. To create routes between the work queues, complete the following substeps.
    1. In **Workflow Designer**, in the left pane, click **Routes**.
    2. On the **Grid** toolbar, click **Normal Routes**.
    3. In the **Routes** pane, click **Sequential** and complete the following substeps.
       1. Drag a route from **Check Equivalencies** to **Missing Equivalency** and **Equivalencies Complete**.
       2. Drag routes from **Missing Equivalency** and **Equivalencies Complete** to **Check Equivalencies**.
       3. Drag a route from **Course Equivalency Review** to **Course Equivalency Failure**.

11. To route a document associated with Transcript eForm to the **Equivalencies Complete** queue, complete the following substeps.
    1. Double-click **Missing Equivalency** queue.
    2. In the **Queue Properties** dialog box, in the left pane, click **Actions**.
    3. In the right pane, on the **Within Queue** tab, in the **Action** list, click **Edit Actions** and complete the following substeps.
       1. In the **Action Settings** dialog box, click **New** and complete the following substeps.
          1. In the **Rule name** box, type a name and in the **Rule type** list, select **Routing rule**.
          2. Under **Statements**, select **New** and complete the following substeps.
             1. In the **Statement name** box, type a name.
             2. Under **Conditions**, click ✚ and complete the following substeps.
                1. In the **Constrain by** list, select **Custom property**.
                2. In the **Type** list, select **Normal**.
                3. In the **Field** list, select **Equivalency Status**.
                4. In the **Operator** list, select **is equal to**.
                5. In the **Value** list, select **True** and click **OK**.
             3. Under **Actions**, click **Add**, select **Route to**, and in the **Available queues**, select **Equivalencies Complete**, click **Add**, and then click **OK**.
             4. Click **OK**.
          3. Under **Status,** select the **Active** option and click **OK**.
       2. Click **OK**.
    4. In the **Action** list select the action and click **OK**.

12. To route a document associated with Course Equivalency Review eForm to **Equivalencies Complete** queue, complete the following substeps.

    1. Double-click **Course Equivalency Review** queue.

    2. In the **Queue Properties** dialog box, in the left pane, click **Actions**.

    3. In the right pane, on the **Within Queue** tab, in the **Action** list, click **Edit Actions**.

        1. In the **Action Settings** dialog box, click **New** and complete the following substeps.

            1. In the **Rule name** box, type a name and in the **Rule type** list, select **Routing rule**.

            2. Under **Statements**, select **New** and complete the following substeps.

                1. In the **Statement name** box, type a name.

                2. Under **Conditions**, click ⊹ and complete the following substeps.

                    1. In the **Constrain by** list, select **Custom property**.

                    2. In the **Type** list, select **Normal**.

                    3. In the **Field** list, select **Equivalency Resolved**.

                    4. In the **Operator** list, select **is equal to**.

                    5. In the **Value** list, select **True** and click **OK**.

                3. Under **Actions**, Click **Add**, select **Route to** and in the **Available queues**, select **Equivalencies Complete**, click **Add**, and click **OK**.

                4. Click **OK**.

            3. Under **Status**, select the **Active** option and click **OK**.

        2. Click **OK**.

    4. In the **Action** list select the action and click **OK**.

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

Configure workflow to handle invalid reasons

The Perceptive Intelligent Capture Verifier sets few invalid reasons while processing transcripts through Perceptive Intelligent Capture. To handle documents with these invalid reasons, create a routing rule in **General Errors** queue. You must configure the workflow for course equivalency, which you created in the Configure an ImageNow workflow process section to handle these invalid reasons. Below is an example to create a routing rule.

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

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

2. Double-click **General Errors** queue.

3. In the **Queue Properties** dialog box, in the left pane, click **Actions**.

4. In the right pane, on the **Within Queue** tab, in the **Action** list, click **Edit Actions** and complete the following substeps.

    1. In the **Action Settings** dialog box, click **New** and complete the following substeps.

        1. In the **Rule name** box, type a name and in the **Rule type** list, select **Routing rule**.

        2. Under **Statements**, select **New** and complete the following substeps.

            1. In the **Statement name** box, type a name.

            2. Under **Conditions**, click ➕ and complete the following substeps.

                1. In the **Constrain by** list, select **Custom property**.

                2. In the **Type** list, select **Normal**.

                3. In the **Field** list, select **Invalid Reason**.

                4. In the **Operator** list, select **is equal to**.

                5. In the **Value** box, type the appropriate invalid reason received from Perceptive Intelligent Capture, without leading and trailing spaces, as shown in the following table and click **OK**.

            3. Under **Actions**, Click **Add**, select **Route to** and in the **Available queues**, select the queue for the respective invalid reason that you typed in the **Value** box as shown in the following table, click **Add**, and then click **OK**.

            4. Click **OK**.

        3. Under **Status**, select the **Active** option and then click **OK**.

    2. Click **OK**.

5. In the **Action** list select the action and click **OK**.

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

Below is the list of values and the corresponding queues. Refer to Configure an ImageNow workflow process section for information on work queues to handle the invalid reasons from Perceptive Intelligent Capture.

Value	Available queue
APPLICANT NOT FOUND	A queue to handle the invalid reason **APPLICANT NOT FOUND** from Perceptive Intelligent Capture.
INSTITUTION NOT FOUND	A queue to handle the invalid reason **INSTITUTION NOT FOUND** from Perceptive Intelligent Capture.
CUMULATIVE GPA <> CALCULATED GPA	A queue to handle the invalid reason **CUMULATIVE GPA <> CALCULATED GPA** from Perceptive Intelligent Capture.
GPA AND APPLICANT INVALID	A queue to handle the invalid reason **GPA AND APPLICANT INVALID** from Perceptive Intelligent Capture.
GPA AND INSTITUTION INVALID	A queue to handle the invalid reason **GPA AND INSTITUTION INVALID** from Perceptive Intelligent Capture.
GPA, INSTITUTION, APPLICANT INVALID	A queue to handle the invalid reason **GPA, INSTITUTION, APPLICANT INVALID** from Perceptive Intelligent Capture.
INSTITUTION AND APPLICANT NOT FOUND	A queue to handle the invalid reason **INSTITUTION AND APPLICANT NOT FOUND** from Perceptive Intelligent Capture.

Configure EDU_RuleEngine.js

Configure the EDU_RuleEngine.js script to connect to the articulation system, retrieve data from the articulation system, and update the articulation system.

Prerequisite

- An Articulation Database is already created based on the following schema.

Column Name	Data Type
InstID	varchar(50)
Subject	varchar(50)
Course	varchar(50)
Title	varchar(50)
Term	varchar(50)
Year	varchar(50)
Grade	varchar(50)

Column Name	Data Type
Equiv_Subject	varchar(50)
Equiv_Course	varchar(50)
Equiv_Title	varchar(50)
Equiv_Credits	varchar(50)

- An ODBC Data Source connection to the Articulation Database is already set up from the ODBC Data Source Administrator dialog box under Administrative Tools in Windows and these settings are updated in the EDU_RuleEngine.js file. For information on how to update the ODBC Data Source Administrator to the EDU_RuleEngine.js file, refer to Update ODBC Data Source credentials.

- eForm users must have access privileges to the ODBC Data Source.

Configure the EDU_RuleEngine.js script to connect to the articulation system, retrieve data from the articulation system, and update the articulation system.

Below is an example of database connection logic. You must replace the sample data in the script with your data and change the implementation of the methods as per your requirements. Below is the list of methods used in the script.

- openConnection. This method contains the credentials of the articulation system and enables the system to connect to the articulation system.

- closeConnection. This method enables the system to disconnect from the articulation system.

- getEquivalentCourse. This method enables the system to retrieve the list of equivalent courses from the articulation system matching the course in the transcript. If the system cannot find a matching course, then it returns an empty list. This method contains the courseInfo object that comprises instId, courseSubject, courseNum, courseTerm, courseYear, and courseGrade as properties.

- setEquivalentCourse. This method updates the articulation system with the new equivalent course. This method contains the courseUpdateInfo object with instId, extCourseSubject, extCourseNumber, extCourseTitle, extCourseTerm, extCourseYear, extCourseGrade, intCourseSubject, intCourseNumber, intCourseTitle, and intCourseCredits as properties.

Update ODBC Data Source credentials

You must update the ODBC Data Source Administrator settings like Datasource, user, and password in the EDU_RuleEngine.js file. To update ODBC settings, complete the following steps.

1. Navigate to the **[*drive*:]/{inserver directory}/Scripts** directory.

2. Open the **EDU_RuleEngine.js** file.

3. Locate the following variables and add the respective values as defined in the ODBC settings.

   - `Datasource`

   - `User`

   - `Password`

Configure BW_Config.xml

Configure the BW_Config.xml to process transcripts through Perceptive Intelligent Capture. You must map ImageNow custom properties and document keys for student ID and the institution ID, which you created in the Create custom properties section in the BW_Config.xml file.

To configure the BW_Config.xml file, complete the following steps.

1. Navigate to the **[*drive*:]\{inserver directory}\etc\transcripts** directory and open the **BW_Config.xml** file in a text editor.

2. In the `configuration` node, scroll to `Examples` and complete the following substeps.

   1. You must configure the import directory from where ImageNow server imports the data Perceptive Intelligent Capture exports as an XML file. An example is shown in the following code block.

      ```
      <importdir> C:\PIC-Transcripts\Export</importdir>
      ```

   2. You must configure the error directory where Perceptive Intelligent Capture creates the error logs during the transcript process. An example is shown in the following code block.

      ```
      <errordir> C:\PIC-Transcripts\Error</errordir>
      ```

   3. You must configure the import directory from where Perceptive Intelligent Capture loads the scanned transcript for processing. An example is shown in the following code block.

      ```
      <doctype name="Transcript" bwimportdir="C:\PIC-Transcripts\Import">
      ```

   4. If you want to map the student ID (also known as applicant ID) and the institution ID to ImageNow document keys, create custom properties for the student ID and institution ID and assign them to the **Transcript** document type. Then type the following code and configure `key` with the ImageNow document keys you want. An example is shown in the following code block.

      ```
      <indexkey xpath="/transcript/studentRecord/applicantId" key="f3" default=""
      function="" mapping="" />

      <indexkey xpath="/transcript/universityInstitutionalRecord/institutionId" key="
      f4" default="" function=" " mapping="" />
      ```

      Note For ImageNow 6.6 and 6.7, document keys are folder, tab, F3, F4, and F5.

   5. If you want to map the student ID (also known as applicant ID) and the institution ID to ImageNow custom properties, create custom properties for the student ID and institution ID and assign it to the **Transcript** document type. Then type the following code and configure `cp` with the ImageNow custom properties. An example is shown in the following code block.

      ```
      <customprop xpath="/transcript/studentRecord/applicantId" cp="StudentId"
      datatype="STRING" default="" mapping=""/>

      <customprop xpath="/transcript/universityInstitutionalRecord/institutionId"
      cp="InstituionId" datatype="STRING" default="" />
      ```

   6. To map the institution ID in a single document key in ImageNow in all types of transcripts, provide the xpaths of the institution ID of the high school transcripts and university transcripts in `arg`, which can support multiple xpaths separated by a comma. The application searches for the value of `key` in `arg` in the order of xpaths mentioned there. The application takes the first non-empty value found as the value of `key`. An example is shown in the following code block.

      ```
      <indexkey xpath="" key="f4" default="" function="ChooseNonEmptyValue"
      mapping="" arg="/transcript/highschoolInstitutionalRecord/institutionId
      ,/transcript/universityInstitutionalRecord/institutionId"/>
      ```

7. Configure the format of the student name and map it to a document key in ImageNow. Specify the format of the student name along with the separator in `formatString`. An example is shown in the following code block.

```
<indexkey xpath="" key="f3" default="" function="ConcatenateFields" mapping=""
arg="/transcript/studentRecord/lastName,/transcript/studentRecord/firstName,/tr
anscript/studentRecord/middleName" formatString="lastname ,firstName,
middleName-initial"/>
```

8. If you want to configure the export file name you must configure the following properties.

Properties	Value	Description
customFileName	True or False	You can configure the custom file name if the value is set to **True**. If the the value is set to **False**, the system, by default, sets the file name to the document ID. For example, if the property is set to true, the file name convention is **ContentDocID^ApplicantID^ApplicantSiteID.tif**. If the property is to false, the file name is **ContentDocID.tif.**
applicantsiteId	Index key or Custom Property	You can configure the applicant site ID with any document key or custom property. The index key can be from Field 1 to Field 5 and the custom property is user defined. For example, the index key is **indexkey:f1** to **indexkey:f5,** for ImageNow 6.6 **indexkey:folder, indexkey:tab, indexkey:f3, indexkey:f4, indexkey:f5** and the custom property is **cp: <user defined custom property>.** **Note** The applicant ID is set by default in the system with the index key. The system uses the applicant ID, which is already configured in step 4 or step 5.

Notes

- Do not modify the xpaths. However, you can change the sequence of the xpaths of the first name, middle name, and last name in `arg`.

- Ensure that the sequence of the xpaths of the first name, middle name, and last name you specify in the `arg` is same as that you specify in `formatString`.

- First name, middle name, and last name are not case-sensitive in `formatString` but their corresponding xpaths are case-sensitive.

- In the `formatString`, you can specify any character as a separator and add `-initial` in first name, middle name, and last name as you prefer.

Enable required iScripts

You must enable the iScripts that are part of your Perceptive Transcript eForms solution.

To enable the iScripts, complete the following steps.

1. Navigate to the **[*drive:*]/{inserver directory}/script** directory.

2. Open each of the following iScript files, locate the CONFIG_VERIFIED setting and replace the FALSE value with TRUE.

   - BW_TranscriptExportDoc.js

   - BW_TranscriptTransfer.js

   - EDU_ExportTranscriptEFormToXML.js

   - EDU_Merging.js

   - EDU_Maintenance.js

   - EDU_CourseEquivalency.js

Configure Transcript eForms configuration files

Transcript eForms contain the following configuration files for different types of transcripts. To configure your Transcript eForms files, refer to any of the following tables.

- Transcript_Config_HS.xml for high school transcripts

- Transcript_Config_Univ.xml for university transcripts

- Transcript_Config_Military.xml for military transcripts

- Course_Equivalency_Config.xml to add custom fields in Course Equivalency Review eFom.

Transcript_Config_HS.xml

Configure the Transcript_Config_HS.xml file. The following table contains the parameters that you must configure.

Node	Parameter		Description
CustomFields	Configuration of user defined fields section. You can have 10 user defined fields. You should not change the number of user defined fields. You can change the value for visible parameter to open or close this section. The default is visible="true".		
	Field name	Internal name for the field. You should not change this parameter.	
	Labelid	Internal ID for the label. You should not change this parameter.	
	Label	Label name of the field.	
	Visible	Parameter to control visibility of a field. The default value is TRUE.	
	readOnly	Parameter to make a field read-only. The default value is FALSE.	

Node	Parameter	Description
	Width	Parameter to change the width in pixels of a user-defined text box.
	maxLength	Parameter to change the maximum length in characters of a user-defined text box.
	tooltipText	Parameter to type the tooltip text.

The format of the XML file with default values is shown in the following example.

```
<?xml version="1.0" encoding="UTF-8"?>

<TranscriptConfig version="Perceptive Transcript eForm 1.1.0">
       <HighSchool>
              <CustomFields visible="true" label="Custom Fields">
                     <Field name="Field1" labelid="Field1label" label="Field1"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field1
Data"/>
                     <Field name="Field2" labelid="Field2label" label="Field2"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field2
Data"/>
                     <Field name="Field3" labelid="Field3label" label="Field3"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field3
Data"/>
                     <Field name="Field4" labelid="Field4label" label="Field4"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field4
Data"/>
                     <Field name="Field5" labelid="Field5label" label="Field5"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field5
Data"/>
                     <Field name="Field6" labelid="Field6label" label="Field6"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field6
Data"/>
                     <Field name="Field7" labelid="Field7label" label="Field7"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field7
Data"/>
                     <Field name="Field8" labelid="Field8label" label="Field8"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field8
Data"/>
                     <Field name="Field9" labelid="Field9label" label="Field9"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field9
Data"/>
                     <Field name="Field10" labelid="Field10label" label="Field10"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field10
Data"/>
              </CustomFields>
       </HighSchool>
</TranscriptConfig>
```

Transcript_Config_Univ.xml

Configure the Transcript_Config_Univ.xml file to map equivalent courses in University transcripts. If you modify the XML file, you must copy the file to the [*drive*:]\{inserver directory}\etc\transcripts directory and to the presentation folders of Transcript eForm and Course Equivalency Review eForm in the [*drive*:]\{inserver directory}\form directory. The following table contains the parameters, which you must configure.

Node	Parameter	Description
Queue	PRE_PROCESSING_QUEUE	Name of the queue in ImageNow to select the courses for equivalency check. The default queue is Pre Processing. The queue name is case-sensitive.
	CHECK_EQUIVALENCY_QUEUE	Name of the queue in ImageNow to check equivalent courses in the transcript. The default queue is Check Equivalencies. The queue name is case-sensitive.
	COURSE_EQUIV_QUEUE	Name of the queue in ImageNow to review documents with missing equivalency and multiple equivalencies. The default queue is Course Equivalency Review. The queue name is case-sensitive.
	INCOMPLETE_QUEUE	Name of the queue in ImageNow to route documents for courses with missing equivalency and multiple equivalencies. The default queue is Missing Equivalency. The queue name is case-sensitive.
	ERROR_QUEUE	Name of the queue in ImageNow that handles course equivalency errors. The default queue is Course Equivalency Failure. The queue name is case-sensitive.
	GENERAL_ERROR_QUEUE	Name of the queue in ImageNow that handles errors. The default queue is General Errors. The queue name is case-sensitive.
	COMPLETE_QUEUE	Name of the queue in ImageNow that routes documents with all matching equivalent courses. The default queue is Equivalencies Complete. The queue name is case-sensitive.
	EXPORT_QUEUE	Name of the queue in ImageNow that exports the documents to the XML file. The default queue is Export eForm Data. The queue name is case-sensitive.

Node	Parameter	Description
	EXPORT_SUCCESS_QUEUE	Name of the queue in ImageNow when the export is successful. The default queue is Export Success. The queue name is case-sensitive.
	EXPORT_FAILURE_QUEUE	Name of the queue in ImageNow when the export fails. The default queue is Export Failure. The queue name is case-sensitive.
Forms	TRANSCRIPT_EFORM_NAME	Name of the Transcript eForm. The default value is Transcript.
	COURSE_EQUIV_EFORM_NAME	Name of the Course Equivalency Review eForm. The default value is EquivalencyReview.
CommonConfiguration	TRANSCRIPT_DOC_TYPE	Name of the ImageNow document type, which you created in Create document type section. The default value is Transcript.
	TRANSCRIPT_TYPE_COLLEGE	Type of the transcript. You can only check university transcripts for equivalent courses. The default value is University. This parameter is case-sensitive.
	DATADEF_FILE_EQUIVALENCY	Location of the data definition files of the Course Equivalency Review eForm on your computer. The default value is [drive:\\]{inserver directory}\\form\\data_definition\\EDU_CourseEquiv.xml.
	BRAINWARE_CONFIG	Location of the Brainware configuration file on your computer. The default value is [drive:]\{inserver directory}\etc\transcripts\ BW_Config.xml.
	COURSE_EQUIV_DOC_TYPE	Name of the ImageNow document type, which you created in Create document type section. The default value is Course Equivalency Review.
	COURSE_EQUIV_DRAWER	Name of the ImageNow drawer for checking course equivalency. You can use the default drawer.
	MERGE_DOCUMENT	Parameter to enable merging documents. Probable values are TRUE or FALSE. The default value is TRUE.

Node	Parameter	Description
CustomFields	Configuration of user defined fields section. You can have 10 user-defined fields. You should not change the number of user-defined fields. You can change the value for `visible` parameter to open or close this section. The default is `visible="true"`.	
	Field name	Internal name for the field. You should not change this parameter.
	Labelid	Internal ID for the label. You should not change this parameter.
	Label	Label name of the field.
	Visible	Parameter to control visibility of a field. The default value is TRUE.
	readOnly	Parameter to make a field read-only. The default value is FALSE.
	Width	Parameter to change the width in pixels of a user-defined text box.
	maxLength	Parameter to change the maximum length in characters of a user-defined text box.
	tooltipText	Parameter to type the tooltip text.
UICourseValidation	datecompleted	Parameter to validate the date completed field for equivalency check and merging. The default value is FALSE.
	subject	Parameter to validate the subject field for equivalency check and merging. The default value is TRUE.
	Title	Parameter to validate the title field for equivalency check and merging. The default value is FALSE.
	Credits	Parameter to validate the credits field for equivalency check and merging. The default value is TRUE.
	Earned	Parameter to validate the earned field for equivalency check and merging. The default value is FALSE.

Below is an example of the XML file from ImageNow 6.7 with default values.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<TranscriptConfig version="Perceptive Transcript eForm 1.1.0">
        <University>
                <Queue>
                        <PRE_PROCESSING_QUEUE>Pre Processing</PRE_PROCESSING_QUEUE>
                        <CHECK_EQUIVALENCY_QUEUE>Check
Equivalencies</CHECK_EQUIVALENCY_QUEUE>
                        <COURSE_EQUIV_QUEUE>Course Equivalency Review</COURSE_EQUIV_QUEUE>
                        <INCOMPLETE_QUEUE>Missing Equivalency</INCOMPLETE_QUEUE>
                        <ERROR_QUEUE>Course Equivalency Failure</ERROR_QUEUE>
                        <GENERAL_ERROR_QUEUE>General Errors</GENERAL_ERROR_QUEUE>
                        <COMPLETE_QUEUE>Equivalencies Complete</COMPLETE_QUEUE>
                        <EXPORT_QUEUE>Export eForm Data</EXPORT_QUEUE>
                        <EXPORT_SUCCESS_QUEUE>Export Success</EXPORT_SUCCESS_QUEUE>
                        <EXPORT_FAILURE_QUEUE>Export Failure</EXPORT_FAILURE_QUEUE>
                </Queue>
                <Forms>
                        <TRANSCRIPT_EFORM_NAME>Transcript</TRANSCRIPT_EFORM_NAME>

        <COURSE_EQUIV_EFORM_NAME>EquivalencyReview</COURSE_EQUIV_EFORM_NAME>
                </Forms>
                <CommonConfiguration>
                        <TRANSCRIPT_DOC_TYPE>Transcript</TRANSCRIPT_DOC_TYPE>
                        <TRANSCRIPT_TYPE_COLLEGE>University</TRANSCRIPT_TYPE_COLLEGE>

        <DATADEF_FILE_EQUIVALENCY>c:\\inserver6\\form\\data_definition\\EDU_CourseEquiv
.xml</DATADEF_FILE_EQUIVALENCY>

        <BRAINWARE_CONFIG>c:\\{inserver6\\etc\\transcripts\\BW_Config.xml</BRAINWARE_CO
NFIG>
                        <COURSE_EQUIV_DOC_TYPE>Course Equivalency
Review</COURSE_EQUIV_DOC_TYPE>
                        <COURSE_EQUIV_DRAWER>DEFAULT</COURSE_EQUIV_DRAWER>
                <MERGE_DOCUMENT>True</MERGE_DOCUMENT>
                </CommonConfiguration>
                <CustomFields visible="true" label="Custom Fields">
                        <Field name="Field1" labelid="Field1label" label="Field1"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field1
Data"/>
                        <Field name="Field2" labelid="Field2label" label="Field2"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field2
Data"/>
                        <Field name="Field3" labelid="Field3label" label="Field3"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field3
Data"/>
                        <Field name="Field4" labelid="Field4label" label="Field4"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field4
Data"/>
                        <Field name="Field5" labelid="Field5label" label="Field5"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field5
Data"/>
                        <Field name="Field6" labelid="Field6label" label="Field6"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field6
Data"/>
                        <Field name="Field7" labelid="Field7label" label="Field7"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field7
Data"/>
```

```
                  <Field name="Field8" labelid="Field8label" label="Field8"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field8
Data"/>
                  <Field name="Field9" labelid="Field9label" label="Field9"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field9
Data"/>
                  <Field name="Field10" labelid="Field10label" label="Field10"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field10
Data"/>
            </CustomFields>
            <UICourseValidation>
      <!--Mandatory Fields-->
      <!--Term, Year, CourseId, Grade-->
                  <datecompleted>false</datecompleted>
                  <subject>true</subject>
                  <title>false</title>
                  <credits>true</credits>
                  <earned>false</earned>
            </UICourseValidation>
      </University>
</TranscriptConfig>
```

Transcript_Config_Military.xml

Configure the Transcript_Config_HS.xml file. The following table contains the parameters that you must configure.

Node	Parameter	Description
CustomFields	Configuration of user defined fields section. You can have 10 user defined fields. You should not change the number of user defined fields. You can change the value for `visible` parameter to open or close this section. The default is `visible="true"`.	
	Field name	Internal name for the field. You should not change this parameter.
	Labelid	Internal ID for the label. You should not change this parameter.
	Label	Label name of the field.
	Visible	Parameter to control visibility of a field. The default value is TRUE.
	readOnly	Parameter to make a field read-only. The default value is FALSE.
	Width	Parameter to change the width in pixels of a user-defined text box.
	maxLength	Parameter to change the maximum length in characters of a user-defined text box.
	tooltipText	Parameter to type the tooltip text.

Below is an example of the XML file with default values.

```
<?xml version="1.0" encoding="UTF-8"?>
<TranscriptConfig version="Perceptive Transcript eForm 1.1.0">
       <Military>
             <CustomFields visible="true" label="Custom Fields">
                    <Field name="Field1" labelid="Field1label" label="Field1"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field1
Data"/>
                    <Field name="Field2" labelid="Field2label" label="Field2"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field2
Data"/>
                    <Field name="Field3" labelid="Field3label" label="Field3"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field3
Data"/>
                    <Field name="Field4" labelid="Field4label" label="Field4"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field4
Data"/>
                    <Field name="Field5" labelid="Field5label" label="Field5"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field5
Data"/>
                    <Field name="Field6" labelid="Field6label" label="Field6"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field6
Data"/>
                    <Field name="Field7" labelid="Field7label" label="Field7"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field7
Data"/>
                    <Field name="Field8" labelid="Field8label" label="Field8"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field8
Data"/>
                    <Field name="Field9" labelid="Field9label" label="Field9"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field9
Data"/>
                    <Field name="Field10" labelid="Field10label" label="Field10"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field10
Data"/>
             </CustomFields>
       </Military>
</TranscriptConfig>
</TranscriptConfig>
```

Course_Equivalency_Config.xml

Configure the Course_Equivalency_Config.xml file. The following table contains the parameters that you must configure.

Node	Parameter	Description
CustomFields		Configuration of user defined fields section. You can have five user defined fields. You should not change the number of user defined fields. You can change the value for `visible` parameter to open or close this section. The default is `visible="true"`.
	Field name	Internal name for the field. You should not change this parameter.
	Labelid	Internal ID for the label. You should not change this parameter.
	Label	Label name of the field.
	Visible	Parameter to control visibility of a field. The default value is TRUE.
	readOnly	Parameter to make a field read-only. The default value is FALSE.
	Width	Parameter to change the width in pixels of a user-defined text box.
	maxLength	Parameter to change the maximum length in characters of a user-defined text box.
	tooltipText	Parameter to type the tooltip text.

Below is an example of the XML file with default values.

```
<?xml version="1.0" encoding="UTF-8"?>
<CourseEquivalencyConfig version="Perceptive Intelligent Capture for Transcripts
Process 1.1.0">
            <CustomFields visible="true" label="Custom Fields">
                    <Field name="Field1" labelid="Field1label" label="Field1"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field1
Data"/>
                    <Field name="Field2" labelid="Field2label" label="Field2"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field2
Data"/>
                    <Field name="Field3" labelid="Field3label" label="Field3"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field3
Data"/>
                    <Field name="Field4" labelid="Field4label" label="Field4"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field4
Data"/>
                    <Field name="Field5" labelid="Field5label" label="Field5"
visible="true" readOnly="false" width="200px" maxLength="256" tooltipText="Field5
Data"/>
            </CustomFields>
</CourseEquivalencyConfig>
```

Run the maintenance script

If you modify the Transcript eForms configuration files in the [drive:]\{inserver directory}\etc\transcripts directory, you must run EDU_Maintenance.js script to copy the files to the folders of Transcript eForm and Course Equivalency Review eForm in the [*drive*:]\{inserver directory}\form directory. This script copies all the configuration files of Transcript eForms except Course_Equivalency_Config.xml, which the script copies only to the folder of Course Equivalency Review eForm. We recommend that you run this script every time you modify the XML file.

- Mention the presentation name for Transcript eForm in `STR_TRANSCRIPT_PRESENTATION_NAME` parameter and mention the presentation name for Course Equivalency Review eForm in `STR_EQUIVALENCY_PRESENTATION_NAME` parameter.

- Enter the following command to run the EDU_Maintenance.js script and commit the changes.

  ```
  intool --cmd run-iscript --file EDU_Maintenance.js
  ```

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 the following additional tasks.

- 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 review error messages, complete the following step.

- To view the error logs, navigate to **[drive:]\{inserver directory}\log** directory and open the log files for respective iScripts in a text editor.

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