Perceptive Transcript eForms

Installation Guide

Version: 2.2

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About Perceptive Transcript eForm

Perceptive Transcript eForms allow you to enter, edit, and process the transcript content with Perceptive Content.

Transcript eForms are commonly used as a part of Intelligent Capture for Transcripts solution. Transcript eforms are displayed in the Perceptive Content Viewer along with the original transcript, giving you the ability to validate the original transcript data. Transcript eForms also allow you to export the captured data for use in another process or Student Information System (SIS).

Transcript eForms help you to manage the following types of transcripts.

- High School transcripts
- University transcripts
- Military transcripts

Prerequisites

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

- Perceptive Content Server, versions 7.1.5 or 7.2.2
- Perceptive Content Client, versions 7.1.5 or 7.2.2
- Perceptive Intelligent Capture, version 5.6SP2
- Perceptive Intelligent Capture for Transcripts, version 2.1
- Perceptive Connect Runtime, version 1.5
- Perceptive Content Connector, version 1.2.4
- Perceptive Capture Connector, version 2.0.0
- File Conversion Service, version 1.1.0

Update Transcripts

Perceptive Transcript eForms allow you to update the existing information captured from Intelligent Capture or add information to the eForm.

- Update Military transcripts
- Update High School transcripts
- Update University transcripts

Update Military transcripts

The three types of Military transcripts are Army transcript, Joint Services transcript, and Navy transcript. The Credit rows details are only available for Joint Services transcript. To update Military transcripts in the Perceptive Content Viewer, complete the following steps.

1. Under **Student Information**, you can update the existing information for the following fields.
   - Student ID
   - Last Name

- First Name
- Middle
- Address
- City
- State
- Zip
- SSN
- DOB
- Phone

2. Under **Military Course Work**, you can update the existing information for the following fields.
   - ACE Guide Number
   - Course ID
   - Date Completed
   - Start Date
3. For Joint Services transcripts, under each course work, the following credit rows are available. You can update the existing information for the following fields.
   - Credit Area
   - Credits
   - Level
4. In case of similar term details in Joint Services transcript, you may click **Group** to group the courses.
   For grouping the courses, ensure that no fields are left blank.
5. Under **Military Course Work**, click **Add** to add more course works and click **Remove** to remove the course works.

   Note: The terms are sorted in the descending order of the "Date Completed" information.

6. For the newly added course work, provide appropriate details for the fields mentioned in the previous step.
7. To add more rows under **Credit Area**, **Credits**, and **Level**, click **Add**.

   Note: The Credit rows are only available for Joint Services transcripts.

8. For the newly added rows, provide appropriate information.
9. To remove the rows under **Credit Area**, **Credits**, and **Level**, click **Remove**.
10. Click **Custom Fields** to add other information under **Field1** to **Field10**.

Update University transcripts

To update University transcripts in the Perceptive Content Viewer, complete the following steps.

1. Under **Institution Information**, you can update the existing information for the following fields.
   - Institution ID

- Name
- Phone
- Address
- City
- State
- Zip

2. Under **Student Information**, you can update the existing information for the following fields.
   - Student ID
   - Last Name
   - First Name
   - Middle
   - Address
   - City
   - State
   - Zip
   - SSN
   - DOB
   - Phone
3. Under **Academic Summary**, you can update the existing information for the following fields.
   - Cumulative GPA
   - Degree Program
   - Major
   - Award Date
4. Under **Degree Program**, **Major**, and **Award Date**, click **Add** to add more columns and click **Remove** to remove the columns.
5. For the newly added columns, provide appropriate information.
6. Under **Course Work**, you can update the existing information for the following fields.
   - Term
   - Year
   - Date Complete
   - Subject
   - Course ID
   - Title
   - Credits
   - Grade
   - Earned
   - Repeat. Select this checkbox if you have repeated this course.
   - Course. Select this checkbox if you want to submit the course for equivalency check.

7. Under **Course Work**, click **Add** width="28.000pt" /> to add more course works and click **Remove** to remove the course works.

   > **Note:** The terms are sorted in the descending order of the "Year" information.

8. For the newly added course work, provide appropriate details for the fields mentioned in the previous step.
9. To add columns under **Subject**, **Course ID**, **Title**, **Credits**, **Grade**, **Earned**, **Repeat**, **Course** fields, click **Add** and to remove the columns click **Remove** .
10. In case of similar term details, you may click **Group** to group the courses.

    > **Note:**
    > For grouping the courses with similar term details, ensure that no fields are left blank.

11. Select the **Select All** checkbox if you want to select all the courses listed under **Course Work** for equivalency check and export transcript data into an XML file that you can import into another process or SIS.
12. Click **Custom Fields** to add other information under **Field1** to **Field10**.

Update High School transcripts

To update High School transcripts in the Perceptive Content Viewer, complete the following steps.

1. Under **High School Information**, you can update the existing information for the following fields.
   - Institution ID
   - Name
   - Phone
   - Address
   - City
   - State
   - Zip
2. Under **Student Information**, you can update the existing information for the following fields.
   - Student ID
   - Last Name
   - First Name
   - Middle
   - Address
   - City
   - State
   - Zip
   - SSN

- DOB
- Phone

3. Under **Academic Summary**, you can update the existing information for the following fields.
    - Cumulative GPA
    - Weighted GPA
    - Class Rank
    - Weighted Class Rank
    - Class Size
    - Total Credits Earned
    - Class Year
    - Graduation Date
4. Under **Course Work**, provide appropriate information for the following fields.

    Note: For the Course Work feature to work, the designer license file must be installed under PICT. For details on the installation of license file, see the Perceptive Intelligent Capture Installation Guide.

    - Year. Provide the year of course.
    - Grade Level. Provide appropriate information.
5. Provide the following information for the courses you have taken for that term.
    - Course. Provide the course.
    - Title. Provide an appropriate description of the course.
    - Q1, Q2, Q3, and Q4. Provide the score letters attained in Q1, Q2, Q3, and Q4.
    - Final. Provide the final score letter of the course.
    - Earned. Provide the total score points attained in this course.
    - Include. Select this checkbox, if you want to include the course for further processing.
    - To add more courses, click **Add**.
    - To delete existing courses, click **Remove**.

    Note: The terms are sorted in the descending order of the "Year" information.

6. Select the **Include** checkbox, if you want to select all courses for further processing in one time.
7. To add more course works, under the **Course Work** pane, click **Add**.
8. To delete existing course works under the **Course Work** pane, click **Delete**.
9. In case of similar term details, you may click **Group** to group the courses.

    Note:
    For grouping the courses with similar term details, ensure that no fields are left blank.

10. Select the **Select All** checkbox if you want to select all course works in one time.
11. Click **Test Scores**.

12. Under **SAT Scores**, you can update the following fields.
    - Test Date
    - Critical Reading
    - Math
    - Writing
    - Essay
    - Multiple Choice
    - EBRW
    - Total
13. To add more rows under **SAT Scores**, click **Add**. Provide appropriate information for the newly added fields mentioned in the previous step.

    To add SAT scores for tests given after March 2016, you must follow the current SAT Score range.
14. To delete rows under **SAT Scores**, click **Remove**.
15. Under **ACT Scores**, you can update the following fields.
    - Test Date
    - English (E)
    - Math (M)
    - Reading (R)
    - Science (S)
    - Composite (C)
    - Combined English Reading (EW)
    - Writing (W)
16. To add more rows under **ACT Scores**, click **Add**. Provide appropriate information for the newly added fields mentioned in the previous step.
17. To delete rows under **ACT Scores**, click **Remove**.

    Note: To add ACT scores, you must follow the valid ACT score range mentioned in parentheses in the transcript.

18. Click **Other Scores**. You can update the following fields.
    - Test ID
    - Test Date
    - Test Score
19. To add more rows under **Other Scores**, click **Add**. Provide appropriate information for the newly added fields mentioned in the previous step.
20. Click **Custom Fields** to add other information under **Field1** to **Field10**.

About course equivalency

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

The University transcripts are only applicable for course equivalency. In cases of missing equivalencies, where there are missing equivalent courses or multiple equivalent courses, a course equivalency review eForm is generated. In the review eForm, you can choose to accept the equivalent course for a specific external transcript or accept and update the equivalent course in the underlying articulation database. You can also deny the equivalent course. In cases of multiple equivalencies, a review document is generated and you can accept and update the equivalent courses available.

Installation details

The PerceptiveTranscripteForms.zip file includes the directories and files that 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.

Obtain and extract the files

To obtain the installation files, contact the Hyland Software Technical Support group. For a list of Technical Support contact numbers, go to hyland.com/pswtscontact. To store and extract the Transcript eForms files for installation, complete the following steps.

1. Store the Perceptive Transcript eForm 2.2.0 -all ZIP file to a temporary directory on your computer.
2. Unzip the ZIP file in a new folder within the temporary directory. You get the following ZIP files.
   - transcript.eForm-2.2.0.zip. This ZIP file contains the transcript eForm and the required scripts.
   - transcript.process-2.2.0.zip. This ZIP file contains the configuration scripts.
   - transcript.review.eform-2.2.0.zip. This ZIP file contains the Course Equivalency Review eForm, and the required scripts.
3. Extract the transcript.eForm-2.2.0.zip file within the same folder.
4. 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.
5. 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.
6. 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.
7. Copy Standard Library (STL) from the **transcript.review.eform\script** folder to the *[drive:]\{inserver directory}\script*directory.
8. Navigate to the **transcript.process\etc\transcripts** folder and copy the XML files to the *[drive:]\{inserver directory}\etc\transcripts* directory.

9. To configure the XML files, see the Configure BW_Config file and Transcript eForms configuration details topics.
10. For a new installation, continue with the installation steps specified under the Install Transcript eForms topic. To upgrade your existing Transcript eForms version, see the Upgrade Transcript eForms topic.

> **Note:** In Perceptive Content 7.1.5 and 7.2.2, you are not required to move the data_definition and presentation folders.

Install Transcript eForms

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

1. Open the **Perceptive Content** Client.
2. In the **Management Console**, click **Forms**.
3. 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. Navigate to the directory that contains the transcript.eForm-2.2.0 files.
   3. In the **Select XML File** dialog box, navigate to your temporary directory, under **data_definition**, click **EDU_PerceptiveTranscript.xml**, and then click **Open**.
   4. To create the eForm presentation, in the **Manage Form Components** dialog box, in the left pane, click **Presentations** and then click **Create**.
   5. Type any name, such as `Transcript` and press `Enter`. In the right pane, click the presentation you just created and then click **Modify**.
   6. In the **Presentation** dialog box, in the left pane, click **Files** and then click **Add**.
   7. 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**.
   8. In the **Manage Form Components** dialog box, click **OK**.
4. To create the eForm, in **Management Console**, on the **Forms** tab, click **New** and type a name for the eForm.

   > **Note:** 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_TranscriptTransfer.js, and EDU_Merging.js files against the TRANSCRIPT_EFORM_NAME property. You can open these files from the *[drive:]/{inserver directory}/script* directory.

5. 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.
6. To configure the eForm, click the form you just created and click **Modify**.
7. 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**.
8. For **Perceptive Content** 7.2.2, in the **Perceptive Content Workflow Designer** window, create a Connect queue, such as Send to Intelligent Capture queue to send the documents to Perceptive Intelligent capture. To set the "IC Imported" queue under "Success Action" list and "IC Processing Error" queue under "Failure Action" list, perform the following substeps.

   > **Note:** You must open the file located at *<drive>:\inserver\etc\inserverWorkflow.ini* in edit mode and add the following configuration `connect.uri = http://<PCR IP:port>/rs/workflowTrigger`.

   1. Double-click the **Send to Intelligent Capture** queue.
   2. Under **Queue Properties**, in the **Success Action** list, select **IC Imported queue** and in the **Failure Action** list, select **IC Processing Error queue**.
9. For **Perceptive Content** 7.1.5, in the **Perceptive Content Workflow Designer** window, create an Integration queue, such as Send to Intelligent Capture queue to send the documents to Perceptive Intelligent capture. To set the "IC Imported" queue under "Success Action" list and "IC Processing Error" queue under "Failure Action" list, perform the following substeps.
   1. Double-click the **Send to Intelligent Capture** queue.
   2. Under **Queue Properties**, in the **Success Action** list, select **IC Imported queue** and in the **Failure Action** list, select **IC Processing Error queue**.
10. To configure **Perceptive Content** 7.1.5 with PCR, complete the following substeps.
    1. Log in to **Perceptive Content** as an administrator.
    2. Click **Manage** and in the left pane, select **Envoy services**.
    3. Click **New**.
    4. In the **Envoy Services** dialog box, in the **Name** and **Description** boxes, provide appropriate name and description.
    5. In the **URI** box, provide the SOAP endpoints of the Workflow trigger.PCR running. For example, http://localhost:81/ws/workflowTrigger?wsdl.
    6. In the **Authentication** list, click **None**.
11. In the **Perceptive Content Workflow Designer** window, create and name the following work queues.
    - A document processing error queue, such as IC Processing Error queue.
    - A document imported queue, such as IC Imported queue.
    - A document OCRed queue, such as IC OCRed queue.
    - A document classified queue, such as IC Classified queue.
    - A document verification queue, such as IC Verified queue.
    - A document extracted queue, such as IC Extracted queue.
    - A document successfully exported queue, such as IC Export Success queue.
    - A document captured successfully queue, such as Intelligent Capture Success queue.
    - A error handling queue, such as General Errors queue.

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

Attach BW_TranscriptTransfer.js to IC Export Success queue

BW_TransciptTransfer.js script runs as an inbound action on the IC Export Success queue. To attach the script to the IC Export Success queue, complete the following steps.

1. Double-click the **IC Export Success** queue.
2. Select **Actions** and then select the **Inbound** tab.
3. In the **iScript** drop-down menu, add and select **BW_TransciptTransfer.js**.
4. Select **OK**.

Install Course Equivalency Review eForm

While evaluating transcripts for equivalent courses, if the system encounters a missing equivalency or multiple equivalencies, Perceptive Content 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 the **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. Navigate to the directory that contains the transcript.review.eform-2.2.0 files.
    3. In the **Select XML File** dialog box, under *\data_definition*, click **EDU_CourseEquiv.xml** and click **Open**.
    4. To create the eForm presentation, in the **Manage Form Components** dialog box, in the left pane, click **Presentations** and then click **Create**.
    5. Type any name, such as `EquivalencyReview`, and press `Enter`. In the right pane, click the presentation you just created and click **Modify**.
    6. In the **Presentation** dialog box, in the left pane, click **Files** and then click **Add**.
    7. 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**.
    8. In the **Manage Form Components** dialog box, click **OK**.
3. To create the eForm, in the 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 upgrade Perceptive Transcript eForms to version 2.2.0, complete the following steps.

Prerequisite

Ensure that you close the Perceptive Content before you upgrade the application.

1. Obtain and extract the PerceptiveTranscripteForms 2.2.0 -all.zip file and follow the steps in the Obtain and extract the files topic.
2. Open the form folder and search for the Form.xsl file in the folders you extracted.
3. Open the Form.xsl file and search for the files with title "Perceptive Transcript eForm".

> **Note:** There can be multiple form folders in your system. You must search for the unique Form.xsl file with the title "Perceptive Transcript eForm".

4. Navigate to the location where you downloaded the PerceptiveTranscripteForms 2.2.0 -all.zip files.
5. Open the **transcript.eform-2.2.0 > 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-mentioned files in the form folder in your local system, where the **Form.xsl** file with the title "Perceptive Transcript eForm" is present.
8. Log in to **Perceptive Content**.
9. Click **Manage** to display the Management Console window.
10. In the **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 *PerceptiveTranscripteForm-2.2.0\transcript.eform-2.2.0\presentation* folder you downloaded.
15. Select the XML files, click **Open** and then click **OK**.
16. Close the window.

> **Note:** To upgrade to PerceptiveTranscripteForms version 2.2.0 or to customize the version of Transcript eForms and installed custom scripts, contact the Hyland support.

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.

1. Configure a Perceptive Content workflow process.
2. Configure the iScript to export transcript data.

Configure a Perceptive Content workflow process

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

1. In the **Management Console**, in the left pane, click **Workflow**.
2. 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 **Perceptive Content 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.
6. To attach the eForm iScript, 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 **Select iScripts**.
   3. In the **Select iScripts** dialog box, click **Add**.
   4. In the **Select iScripts** dialog box, click **EDU_ExportTranscriptEFormToXML.js** and then click **OK**.
   5. In the **Select iScripts** dialog box, click **OK**.
   6. In the **iScript** list, click **EDU_ExportTranscriptEFormToXML.js** and then click **OK**.
7. To create sequential routes from the transcript export queue to the export success and export failure queues, complete the following substeps.
   1. In the **Workflow Designer**, in the left pane, click **Routes**.
   2. In the **Routes** pane, click **Sequential**.
   3. Drag a route from the transcript export queue, such as Export eForm Data, to the export success queue, such as Export Success.
   4. Drag a route from the transcript export queue, such as Export eForm Data, to the export failure queue, such as Export Failure.
8. Optional. To incorporate the work queues into your existing workflow process, create additional routes.
9. Close Workflow Designer and Management Console.

Configure the iScript to export transcript data

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

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 `IDX_STUDENT_ID`with a **Perceptive Content** index key or document key.
   - To map Perceptive Content 7.1.5 or 7.2.2, use field1, field2, field3, field4 or field5.
3. To map the eForm name, set `EFORM_NAME` to the eForm name you created.
4. To map the export failure queue, set `QUEUE_ERROR` to the export failure queue name you created, Configure a Perceptive Content workflow process topic.
5. To map the export success queue, set `QUEUE_COMPLETE` to the export success queue name you created, Configure a Perceptive Content workflow process topic.
6. To map the directory to receive the transcript data, set `EFORM_EXPORT_DIR` to a valid path, such as *[drive:]\{inserver directory}\\log*.
7. To activate the iScript, set `CONFIG_VERIFIED` to `true`.
8. To re-export the University courses, set `EFORM_FORCE_EXPORT` to `true`.
9. Save and close the EDU_ExportTranscriptEFormToXML.js file.

Sample configuration

The following example shows a configured EDU_ExportTranscriptEFormToXML.js file in Perceptive Content 7.2.2.

Sample EDU_ExportTranscriptEFormToXML.js file

```
Configuration *****************
        // Index Keys 7.2.2 (Valid Options: "field1", "field2" "field3",
"field4", "field5")

//eForm Name
        #define EFORM_NAME "EDU_Transcript"
        //Workflow Queue Names
        #define QUEUE_ERROR "Export Failure"
        //Export File Configuration
        #define EFORM_EXPORT_DIR "c:\\inserver\\log\\"
        // set to true when configuration values have been verified
        #define EFORM_FORCE_EXPORT
        //set to true when courses are re exported
        //#define CONFIG_VERIFIED true #define CONFIG_VERIFIED true
```

About exporting University transcripts

For University transcripts, the export XMLs contain the selected courses only. If no courses are selected in transcript eForm, then the export XML will not contain the course data.

For multiple district University transcripts, multiple export XML files are created based on the number of unique college codes. If a transcript contains "n" number of unique college codes, then "n" number of export XMLs are generated. The file name for each export XML is appended with "_<collegecode>". If the college code is empty within the transcript, then the file name will remain unchanged. The following are the examples.

- If "RIV" is a college code and "University" is the configured file name, then the export file name will be "University_RIV.xml".
- If the file name is "University", the exported XML name will be University.xml.

Create and configure channels

To create and configure the Perceptive Capture Connector channels using Perceptive Content, see the following information.

Triggers

The following triggers are available.

- Integration ASQ Trigger. You must create one channel using this trigger.
- Document Trigger. You must create one channel using this trigger.
- Status Update Trigger. You must create six channels using this trigger. The following table displays the available status codes and their corresponding input mapping XML files.

Status codes	Input mapping file
100	Status 100 Input Mapping.xml
200	Status 200 Input Mapping.xml
250	Status 250 Input Mapping.xml
300	Status 300 Input Mapping.xml
550	Status 550 Input Mapping.xml
700	Status 700 Input Mapping.xml

Integration ASQ Trigger

To create a channel using Status Update Trigger, complete the following steps.

1. On the **Create Channel** page, in the **Name** box, type an appropriate name for the channel.

2. In the **Description** box, provide a description for the channel.
3. In the **Trigger** list, select **Integration ASQ Trigger**.
4. In the **Workflow Queue ID** box, type the <ID of Send to Intelligent Capture queue> and select **Continue**.
5. In the **Modify Channel Mapping** window, under **Actions** list, select **File System Document Export Action**.
6. In the **Inputs** box, replace the input mapping with the Export to IC Input Mapping. The Export to IC Input Mapping.xml file is available in the Samples directory located under transcript.process-2.2.0.zip file.
7. In the input mapping, replace the `c:/literal` of parameter "segment 1" with the client ID. To configure the client ID, see the Perceptive Intelligent Capture for Transcripts Installation Guide.
8. In the input mapping, replace the `ExportDirectory` parameter with the export parameter of the file from where Intelligent Capture has imported the data.
9. Click **Enable Channel**. You have successfully created the channel.

Document Trigger

To create a channel using Document Trigger, complete the following steps.

1. On the **Create Channel** page, in the **Name**box, type an appropriate name for the channel.
2. In the **Description** box, provide a description for the channel.
3. In the **Trigger** list, select **Document Trigger**.
4. In the **Project Name** box, type `PICT`.
5. In the **Client ID** box, type the <client ID>. To configure the client ID, see the Perceptive Intelligent Capture for Transcripts Installation Guide.
6. In the **Document Class** box, type `Transcripts`.
7. In the **Mode** box, type `EXPORT` and select **Continue**.
8. In the **Modify Channel Mapping** window, under **Actions** list, select **RouteImageNowWorkflowitem**.
9. In the **Inputs** box, replace the input mapping with the appropriate mapping. The Export XML to Content Input Mapping.xml file is available in the Samples directory located under transcript.process-2.2.0.zip file.
10. In the **Outputs** box, replace the output mapping with the Export XML to Content Output mapping. The Export XML to Content Output Mapping.xml file is available in the Samples directory located under transcript.process-2.2.0.zip file.
11. Click **Enable Channel**. You have successfully created the channel.

Status Update Trigger

You must create six channels using the available six status codes. To create channels using the Status Update Trigger, complete the following steps.

1. On the PCR home page, under **Manage**, select **Create a Channel**.
2. On the **Create Channel** page, in the **Name** box, type an appropriate name for the channel.
3. In the **Description** box, provide a description for the channel.
4. In the **Trigger** list, select **Status Update Trigger**.

5. In the **Project Name** box, type `PICT`.
6. In the **Client ID** box, type the <client ID>. To configure the client ID, see the Perceptive Intelligent Capture for Transcripts Installation Guide.
7. In the **Status Code** box, type the <status code>. The available status codes are 100, 200, 250, 300, 550, 700.
8. Select **Continue**.
9. In the **Modify Channel Mapping** window, under the **Actions** list, select **RouteImageNowWorkflowitem**.
10. In the **Inputs** box, replace the input mapping with the appropriate mapping. The input mappings for the various status codes are available in the Samples directory located under transcript.process-2.2.0.zip file.
11. Click **Enable Channel**. You have successfully created the channel.
12. Repeat this procedure to create more channels.

Configure Perceptive Content for course equivalency

You must configure Perceptive Content 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.

1. Create custom properties.
2. Create document type .
3. Map the document type to the default **Perceptive Content** drawer or you can create a new drawer. For information on how to create a drawer, see the **Perceptive Content** Help.
4. Configure a Perceptive Content workflow process for course equivalency.

Create custom properties

You can map the student ID and the institution ID in the eForm to either Perceptive Content document keys or Perceptive Content custom properties. You must configure the student ID (also known as applicant ID) and the institution ID in BW_Config.xml file. You must not modify any of the custom properties.

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

Note: If you require a review document for a single equivalent course, set the "AutoReviewSingleEquivalentCourse" custom property to False.

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.

1. Select **Is a form** and in the **Form** list select the corresponding eForm name for each document type.
2. 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. For information on custom properties, see the Create custom properties topic.

   Note: For information on how to create a document type and assign a custom property to the document type, see the Perceptive Content Help.

3. Assign the AutoReviewSingleEquivalentCourse custom property to the Transcript document type. You must make it a required field. There can be one of the following scenarios.
   - Property is True. If only one equivalent course is available, no review document is created and the equivalent course is accepted automatically.
   - Property is False. If one equivalent course is available, a review document is created and you can accept and update the equivalent course.

Configure a Perceptive Content workflow process for course equivalency

The course equivalency process requires five work queues in your Perceptive Content workflow process. To configure a workflow process, complete the following steps.

1. In the **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 **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 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. For information on handling documents with these invalid reasons, see the Configure workflow to handle invalid reasons topic. 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 to the Pre Processing queue, 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 **Select iScripts**.
    4. In the **Select iScripts** dialog box, click **Add**.
    5. Click **EDU_Merging.js** and then click **OK**.
    6. Click **OK**.
    7. In the **iScript** list, click **EDU_CourseEquivalency.js** and click **OK**.
8. To attach the eForm iScript to the Check Equivalencies queue, 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 **Select iScripts**.
    4. In the **Select iScripts** dialog box, click **Add**.
    5. Select **EDU_CourseEquivalency.js** and then click **OK**.
    6. In the **Select iScripts** dialog box, click **OK**.
    7. 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 the **Workflow Designer**, in the left pane, click **Routes**.
    2. In the **Routes** pane, click **Sequential**.

3. Drag a route from **Check Equivalencies** to **Missing Equivalency and Equivalencies Complete**.
4. Drag routes from **Missing Equivalency** and **Equivalencies Complete** to **Check Equivalencies**.
5. 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**.
    4. In the **Action Settings** dialog box, click **New**.
    5. In the **Rules Editor** dialog box, under the **Rule name** box, type a name and in the **Rule type** list, select **Routing rule**.
    6. Under **Statements**, select **New**.
    7. In the **Statement Editor** dialog box, under **Statement name** box, type a name.
    8. Under **Conditions**, click **Add** .
    9. In the **Constrain by** list, select **Custom property** and in the **Type** list, select **Normal**.
    10. In the **Field** list, select **Equivalency Status**.
    11. In the **Operator** list, select **is equal to** and in the **Value** list, select **True** and click **OK**.
    12. Under **Actions**, click **Add**, select **Route to**, and in the available queues, select **Equivalencies Complete**, click **Add**, and then click **OK**.
    13. Click **OK**.
    14. Under **Status**, select the **Active** option and click **OK**.
    15. Click **OK**.
    16. In the **Action Settings** dialog box, 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**.
    4. In the **Action Settings** dialog box, click **New** and click **OK**.
    5. In the **Rules Editor** dialog box, under the **Rule name** box, type a name and in the **Rule type** list, select **Routing rule**.
    6. Under **Statements**, select **New**.
    7. In the **Statement Editor** dialog box, under the **Statement name** box, type a name.
    8. Under **Conditions**, click **Add**.
    9. In the **Constrain by** list, select **Custom property**.
    10. In the **Type** list, select **Normal** and in the **Field** list, select **Equivalency Resolved**.
    11. In the **Operator** list, select **is equal to** and in the **Value** list, select **True** and click **OK**.

    12. Under **Actions**, click **Add**, select **Route to** and in the available queues, select **Equivalencies Complete**, click **Add** and click **OK**.
    13. Click **OK**.
    14. In the **Action Settings** dialog box, click **OK**.
    15. Under **Status**, select the **Active** option and click **OK**.
    16. 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. The following is an example to create a routing rule. To configure an existing workflow process, complete the following steps.

Prerequisite

To handle documents with these invalid reasons, you must create a routing rule in General Errors queue. You must configure the workflow for course equivalency, which you created in the Configure a Perceptive Content workflow process topic to handle these invalid reasons.

1. In the **Management Console**, in **Workflow**, open the workflow you want to configure.
2. Double-click the **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**.
    2. In the **Rule name** box, type a name and in the **Rule type** list, select **Routing rule**.
    3. Under **Statements**, select **New**.
    4. In the **Statement name** box, type a name.
    5. Under **Conditions**, click **Add**.
    6. In the **Constrain by** list, select **Custom property**.
    7. In the **Type** list, select **Normal**.
    8. In the **Field** list, select **Invalid Reason**.
    9. In the **Operator** list, select **is equal to**.
    10. 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**.
    11. 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 next topic, click **Add**, and then click **OK**.
    12. Click **OK**.
    13. Under **Status**, select the **Active** option and then click **OK**.
    14. In the **Action Settings** dialog box, click **OK**.

5. In the **Action** list select the action and click **OK**.
6. Close Workflow Designer and Management Console.

Values and available queues

The following table displays the values and the corresponding queues.

Value	Available queues
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.

EDU_RuleEngine configuration details

The configuration of EDU_RuleEngine.js script is required to connect to the articulation system, retrieve data from the articulation system, and update the articulation system. An articulation database is already created based on the following schema that must exist.

The following table displays the schema required to create an articulation database.

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)
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, see the Update ODBC Data Source credentials topic.
- eForm users must have access privileges to the ODBC Data Source.

The following 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. The following 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 file

To configure the BW_Config.xml to process transcripts through Perceptive Intelligent Capture, complete the following steps.

Prerequisite

You must map Perceptive Content custom properties and document keys for student ID and the institution ID, which you created in the Create custom properties topic.

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. If you want to map the student ID (also known as applicant ID) and the institution ID to Perceptive Content 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 Perceptive Content document keys you want. An example is shown in the following code block.
```
<indexkey xpath="/transcript/studentRecord/applicantId" key="field3"
default=""
        function="" mapping="" />

        <indexkey
xpath="/transcript/universityInstitutionalRecord/institutionId" key="
        field4" default="" function=" " mapping="" />
```

      Note: For Perceptive Content 7.1.5 or 7.2.2, document keys are field1, field2, field3, field4, field5.

   2. If you want to map the student ID (also known as applicant ID) and the institution ID to **Perceptive Content** 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 **Perceptive Content** 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="" />
```

3. To map the institution ID in a single document key in **Perceptive Content** 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="field4" default=""
function="ChooseNonEmptyValue"
mapping=""
arg="/transcript/highschoolInstitutionalRecord/institutionId
,/transcript/universityInstitutionalRecord/institutionId"/>
```

4. Configure the format of the student name and map it to a document key in **Perceptive Content**. 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="field3" default=""
function="ConcatenateFields" mapping=""

arg="/transcript/studentRecord/lastName,/transcript/studentRecord/fir
stName,/tr
anscript/studentRecord/middleName" formatString="lastname ,firstName,
middleName-initial"/>
```

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 the previous steps.

Note: 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`.

Note: 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`.

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

Note: 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_TranscriptTransfer.js

- EDU_ExportTranscriptEFormToXML.js
- EDU_Merging.js
- EDU_Maintenance.js
- EDU_CourseEquivalency.js

Transcript eForms configuration details

Transcript eForms contain the following configuration files for different types of transcripts.

To configure your Transcript eForms files, see the following topics.

- Transcript_Config_HS file for High School transcripts.
- Transcript_Config_Univ file for University transcripts.
- Transcript_Config_Military file for Military transcripts.
- Course_Equivalency_Config file to add custom fields in Course Equivalency Review eForm.

Transcript_Config_HS file

To configure the Transcript_Config_HS.xml file. you must configure the parameters mentioned in the following table.

Custom fields. You can have 10 user defined fields. You must not change the number of user defined fields. You can change the value for the visible parameter to open or close this section. The default is visible="true". See the following parameters that you must configure for this node.

Parameter	Description
Field name	Internal name for the field. You must not change this parameter.
Labelid	Internal ID for the label. You must 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.

Parameter	Description
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 2.2.0">
 <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 file

The Transcript_Config_Univ.xml file is required to map the equivalent courses in University transcripts. If you modify the XML file, you must copy the file to *[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 that must be configured.

Node	Parameter	Description
Queue	PRE_PROCESSING_QUEUE	The name of the queue in Perceptive Content to select the courses for equivalency check. The default queue is Pre Processing. The queue name is case-sensitive.
Queue	CHECK_EQUIVALENCY_ QUEU E	The name of the queue in Perceptive Content to check equivalent courses in the transcript. The default queue is Check Equivalencies. The queue name is case-sensitive.
Queue	COURSE_EQUIV_QUEUE	The name of the queue in Perceptive Content to review documents with missing equivalency and multiple equivalencies. The default queue is Course Equivalency Review. The queue name is case-sensitive.
Queue	INCOMPLETE_QUEUE	The name of the queue in Perceptive Content to route documents for courses with

Node	Parameter	Description
		missing equivalency and multiple equivalencies. The default queue is Missing Equivalency. The queue name is case-sensitive.
Queue	ERROR_QUEUE	The name of the queue in Perceptive Content that handles course equivalency errors. The default queue is Course Equivalency Failure. The queue name is case-sensitive.
Queue	GENERAL_ERROR_QUEUE	The name of the queue in Perceptive Content that handles errors. The default queue is General Errors. The queue name is case-sensitive.
Queue	COMPLETE_QUEUE	The name of the queue in Perceptive Content that routes documents with all matching equivalent courses. The default queue is Equivalencies Complete. The queue name is case-sensitive.
Queue	EXPORT_QUEUE	The name of the queue in Perceptive Content that exports the documents to the XML file. The default queue is Export eForm Data. The queue name is case-sensitive.
Queue	EXPORT_SUCCESS_QUEUE	The name of the queue in Perceptive Content when the export is successful. The default queue is Export Success. The queue name is case-sensitive.
Queue	EXPORT_FAILURE_QUEUE	The name of the queue in Perceptive Content when the export fails. The default queue is Export Failure. The queue name is case-sensitive

Node	Parameter	Description
Forms	TRANSCRIPT_EFORM_NAME	The name of the Transcript eForm. The default value is Transcript.
Forms	COURSE_EQUIV_EFORM_ NAM E	The name of the Course Equivalency Review eForm. The default value is EquivalencyReview.
CommonConfiguration	TRANSCRIPT_DOC_TYPE	The name of the Perceptive Content document type, which you created in the previous topic. The default value is Transcript.
CommonConfiguration	TRANSCRIPT_TYPE_ COLLEGE	The type of the transcript. You can only check university transcripts for equivalent courses. The default value is University. This parameter is case-sensitive.
CommonConfiguration	DATADEF_FILE_ EQUIVALENCY	The 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.
CommonConfiguration	BRAINWARE_CONFIG	The location of the Perceptive Intelligent Capture configuration file on your computer. The default value is [drive:]\{inserver directory}\etc\transcripts\ BW_ Config.xml.
CommonConfiguration	COURSE_EQUIV_DOC_TYPE	The name of the Perceptive Content document type. The default value is Course Equivalency Review.
CommonConfiguration	COURSE_EQUIV_DRAWER	The name of the Perceptive Content drawer for checking course equivalency. You can use the default drawer.

Node	Parameter	Description
CommonConfiguration	MERGE_DOCUMENT	The parameter to enable merging documents. The probable values are `TRUE` or `FALSE`. The default value is `TRUE`.
CustomFields	text	The configuration of user defined fields section. You can have 10 user-defined fields. You must 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".
CustomFields	Field name	The internal name for the field. You should not change this parameter.
CustomFields	LabelID	The internal ID for the label. You should not change this parameter.
CustomFields	Label	The label name of the field.
CustomFields	Visible	The parameter to control visibility of a field. The default value is `TRUE`.
CustomFields	readOnly	The parameter to make a field read-only. The default value is `FALSE`.
CustomFields	Width	The parameter to change the width in pixels of a user-defined text box.
CustomFields	maxLength	The parameter to change the maximum length in characters of a user-defined text box.
CustomFields	tooltip text	The parameter to type the tooltip text.
UICourseValidation	datecompleted	The parameter to validate the

Node	Parameter	Description
		date completed field for equivalency check and merging. The default value is FALSE.
UICourseValidation	subject	The parameter to validate the subject field for equivalency check and merging. The default value is TRUE.
UICourseValidation	Title	The parameter to validate the title field for equivalency check and merging. The default value is FALSE.
UICourseValidation	Credits	The parameter to validate the credits field for equivalency check and merging. The default value is TRUE.
UICourseValidation	Earned	The parameter to validate the earned field for equivalency check and merging. The default value is FALSE.

The following is an example of the XML file from Perceptive Content 7.2.2 with default values.


```
<?xml version="1.0" encoding="UTF-8"?>
 <TranscriptConfig version="Perceptive Transcript eForm 2.2.0">
  <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:\\inserver\\form\\data_definition\\EDU_
CourseEquiv
.xml</DATADEF_FILE_EQUIVALENCY>
   <BRAINWARE_CONFIG>c:\\inserver\\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"/>Perceptive Transcript eForms Installation and Setup Guide
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    <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 file

You must configure the Transcript_Config_HS.xml file.

The following table contains the following parameters for Custom Fields node that must be configured.

- Custom Fields. 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".

Parameters	Description
Field name	The internal name for the field. You should not change this parameter.
Label ID	The internal ID for the label. You should not change this parameter.
Label	The label of the field.
Visible	The parameter to control visibility of a field. The default value is `TRUE`.
readOnly	The parameter to make a field read-only. The default value is `FALSE`.
Width	The parameter to change the width in pixels of a user-defined text box.
maxLength	The parameter to change the maximum length in characters of a user defined text box.
tooltip text	The parameter to type the tooltip text.

The following is an example of the XML file with default values.

```
<?xml version="1.0" encoding="UTF-8"?>
<TranscriptConfig version="Perceptive Transcript eForm 2.1.0">
 <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 file

You must configure the Course_Equivalency_Config.xml file.

The following table contains the parameters that you must configure for the "Custom fields" node.

Parameters	Description
Field name	The internal name for the field. You should not change this parameter
Label ID	The internal ID for the label. You should not change this parameter.
Label	The label of the field.
Visible	The parameter to control visibility of a field. The default value is `TRUE`.
readOnly	The parameter to make a field read-only. The default value is `FALSE`.
Width	The parameter to change the width in pixels of a user-defined text box.
maxLength	The parameter to change the maximum length in characters of a user-defined text box.
tooltipText	The parameter to type the tooltip text.

The following 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 2.2.0">
 <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>
```

Custom field configuration details

To configure the custom fields, complete the following steps.

1. Navigate to the directory, where Perceptive Intelligent Capture for Transcripts is installed,
2. Under the **Global** folder, open the PICT.ini configuration settings file.
3. In the PICT.ini file, set the `GRL_OP_UseDynamicVerifierForm` flag to `Yes`.
4. Log in to the Perceptive Intelligent Capture for Transcripts database and make the following modifications.
    1. Edit the `BRWFLD` table and set the `RequiredInVerfier` flag to `TRUE` for FieldName 'Custom1' to 'Custom10'.
    2. Edit the `BRWEXPHSHeader` table and add field1 to field10 under the `XMLTag` column for corresponding FieldName 'Custom1' to 'Custom10'.
    3. Edit the `BRWEXPMilHeader` table and add field1 to field10 under the `XMLTag` column for corresponding FieldName 'Custom1' to 'Custom10'.
    4. Edit the `BRWEXPUnivHeader` table and add field1 to field10 under the `XMLTag` column for corresponding FieldName 'Custom1' to 'Custom10'.

Run the maintenance script

If you modify the Transcript eForms configuration files in the *[drive:]\{inserver directory}\etc\transcripts*, 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. You must run this script whenever you modify the XML file. To modify the XML file, execute the following steps.

1. 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.
2. Type 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

You may complete the following additional tasks to administer an eForm.

1. Delete an eForm.
2. Associate a form with a workflow queue.
3. Assign privileges.

> **Note:** For more information on administrating an eForm, see the eForms Getting Started Guide.