Perceptive Transcript eForm

Installation Guide

Version: 2.4

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Hyland

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About Perceptive Transcript eForm

Perceptive Transcript eForm allows you to enter, edit, and process the transcript content with Perceptive Content.

Transcript eForm is commonly used as a part of Brainware for Transcripts solution. Transcript eform is displayed in the Perceptive Content Viewer along with the original transcript, giving you the ability to validate the original transcript data. Transcript eForm also allows you to export the captured data for use in another process or Student Information System (SIS).

Transcript eForm helps you manage the following types of transcripts.

- High School transcripts
- University transcripts
- Military transcripts

Prerequisites

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

- Perceptive Content Server, versions 7.2.3 and 7.3.0
- Perceptive Content Client, versions 7.2.3 and 7.3.0
- Perceptive Intelligent Capture, version 5.6SP2
- Brainware for Transcripts, version 2.3
- 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

Note:
Transcript eForm also supports Perceptive Experience Content Apps, versions 2.4 and 3.0.

Installation details

The PerceptiveTranscripteForm.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 eForm files for installation, complete the following steps.

1. Store the Perceptive Transcript eForm 2.4.0 -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-2.4.0.zip. This ZIP file contains the transcript eForm and the required scripts.
- transcript.process-2.4.0.zip. This ZIP file contains the configuration scripts.
- transcript.review.eform-2.4.0.zip. This ZIP file contains the Course Equivalency Review eForm, and the required scripts.

3. Extract the transcript.eForm-2.4.0.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. After completing the steps mentioned under Install Transcript eForm, configure the XML files, see the Configure BW_Config file and Transcript eForm configuration details sections.
10. For a new installation, continue with the installation steps specified under the Install Transcript eForm section. To upgrade your existing Transcript eForm version, see the Upgrade Transcript eForm section.

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

Install Transcript eForm

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-2.4.0 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. Open the **Transcript_Config_Univ.xml** file from the *[drive:]/{inserver directory}/etc/transcript* directory. In this XML file, add `Transcript` to the **TRANSCRIPT_EFORM_NAME** tag.
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. 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**.

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 , 7.2.2, and higher, 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.

Note: For multi-pass functionality, update the client ID and queue name in the `<statuscode code="800">` tag for multiple passes.

Upgrade Transcript eForm

To upgrade Perceptive Transcript eForm to version 2.4.0, complete the following steps.

Prerequisite

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

1. Obtain and extract the PerceptiveTranscripteForm 2.4.0 -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 PerceptiveTranscripteForm 2.4.0 -all.zip files.
5. Open the **transcript.eform-2.4.0 > 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 **Perceptive Content 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-2.4.0\transcript.eform-2.4.0\presentation* folder you downloaded.
15. Select the XML files, click **Open** and then click **OK**.
16. Close the window.

Note: To upgrade to Perceptive Transcript eForm version 2.4.0 or to customize the version of Transcript eForm and install custom scripts, contact the Hyland support.

Transcript eForm configuration details

Transcript eForm contains the following configuration files for different types of transcripts.

To configure your Transcript eForm 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`.

Parameter	Description
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.

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. 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 merging. 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

Node	Parameter	Description
		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 missing equivalency and multiple equivalencies. The default queue is Missing Equivalency. The queue name is case-sensitive. **Note:** If you perform a course equivalency check for at least one course, the transcript is sent to the Missing Equivalency queue if no equivalent course is found.
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. **Note:** The transcript eForm is editable in the Course Equivalency Failure queue.
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

Node	Parameter	Description
		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
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_	The location of the data definition

Node	Parameter	Description
	EQUIVALENCY	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.
CommonConfiguration	MERGE_DOCUMENT	The parameter to enable merging documents. The probable values are `TRUE` or `FALSE`. The default value is `TRUE`.
CommonConfiguration	SHOW_EQUIVALENCY_IN_ ALL	This parameter enables the user to view equivalent courses outside the Perceptive Content workflow. The probable values are `TRUE` or `FALSE`.
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".

Node	Parameter	Description
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 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`.

Node	Parameter	Description
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"/>
    <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="Brainware 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>
```

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 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.

6. For Perceptive Content 7.2.2 and higher, 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**.
7. 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**.
8. 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.
9. 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**.
10. 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.
11. Optional. To incorporate the work queues into your existing workflow process, create additional routes.

12. 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 the 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.

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, 7.2.2, and higher, 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
```

Enable required iScripts

You must enable the iScripts that are part of your Perceptive Transcript eForm 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

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`

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**.

Custom field configuration details

To configure the custom fields, complete the following steps.

1. Navigate to the directory, where Brainware 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 Brainware 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'.

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	Queue
100	Status 100 Input Mapping.xml	IC Imported
200	Status 200 Input Mapping.xml	IC OCRed
300	Status 300 Input Mapping.xml	IC Classified
550	Status 550 Input Mapping.xml	IC Verify
700	Status 700 Input Mapping.xml	IC Extracted
800	Status 800 Input Mapping.xml	IC Exported

Note:
For multi-pass functionality, create the same set of channels for Pass 2 with different client IDs.

Integration ASQ Trigger

To create a channel using the 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-2.4.0.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 Brainware 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 Brainware 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-2.4.0.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-2.4.0.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 Brainware 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-2.4.0.zip file.
11. Click **Enable Channel**. You have successfully created the channel.
12. Repeat this procedure to create more channels.

Configure multi-pass

To configure multi-pass, you must configure Perceptive Connect Runtime, Brainware for Transcripts (BFT) database, and Perceptive Content workflow queues and then create entries in BW_Config.xml.

You must create a set of channels in Perceptive Connect Runtime. For more information, refer to the Create and configure channels section of the installation guide.

Note: To configure BFT, create two export profiles with two client IDs and then configure the fields to be exported corresponding to the two client IDs. Student and institution information sections are mandatory for all profiles.

About multi-district transcripts

For University transcripts, the exported XMLs for external SIS contain the selected courses only. If no courses are selected in transcript eForm, then the documents will not contain the course data.

For multi-district University transcripts, multiple documents are created based on the number of unique college codes. Each exported college code is appended with an institution ID in the unique field by a separator. If a transcript contains "n" number of unique college codes, then "n" number of multiple documents are generated. The institution ID document key is appended with "-<collegecode>".

If the exported college code is XYZ, then the generated split transcript will have “<xxxxxxxxx>-XYZ” as the institution ID in the document key.

Configure Perceptive Content for course equivalency

You must configure Perceptive Content to use the eForm to check equivalent courses in the 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	Flag	False
Equivalency Resolved	Flag	False
Invalid Reason	String	
AutoReviewEquivalentCourses	Flag	True

Note: If the"AutoReviewEquivalentCourses" custom property is set to `True` and an external course is sent for review and at least one equivalent course is found, then the eForm is auto-reviewed and no review eForm is generated. If the custom property is set to False, a review eform is generated, irrespective of the number of equivalent courses found.

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 a document type and click **Modify**.
2. In the **Modify Document Type** dialog box, select **Is a form** and in the **Form** list, select the corresponding eForm name for each document type
3. 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.

4. Assign the AutoReviewEquivalentCourses 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, an external course is sent for review, and at least one equivalent course is found. The eForm is auto-reviewed and no review eForm is generated.
   - Property is False. A review eform is generated, irrespective of the number of equivalent courses found.

Configure a Perceptive Content workflow process for course equivalency

The course equivalency process requires five work queues in your 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 for courses that are missing equivalent courses, such as Missing Equivalencies.
   - 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.

     Note: If a document is in failure queue, then the document is modifiable in the Course Equivalency Failure queue only.

   - 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_Merging.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 eForm 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 **Transcript eForm** 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 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 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 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 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.

Run the maintenance script

If you modify the Transcript eForm 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 eForm 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
```