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Change of Academic Program Form Overview

Students will utilize an online form to make any modifications to their academic program. This includes adding or removing additional majors, certificates, and/or concentrations. Students are highly encouraged to reach out to their academic adviser prior to completing this form. Once the student completes the form online, it is routed to the Director of Advising for the specific college. The Director of Advising will complete an internal review including impacts to degree completion, Academic Common Market, and other potential advising concerns. Once reviewed, the Director of Advising will make a decision and route the document forward to the Office of the Registrar for processing in Colleague. The student will receive a final confirmation of action taken.

How Students Access the Form

Students will access the form at https://www.coastal.edu/studentforms.

This site is behind the Microsoft Azure login and will require students to log in using their CCU network credentials.
Workflow Roles

There are multiple roles as it relates to processing online Change of Academic Program form:

- **Director of Advising** – Each college has a Director of Advising (and/or designee), which will be the first “stop” in the approval process. The Director of Advising should complete an internal review including impacts to degree completion, Academic Common Market, and other potential advising concerns. The Director of Advising will receive daily emails when work needs to be completed.

- **Associate Deans** - All Associate Deans have access to the appropriate Director of Advising workflow queue. Associate Deans also have the ability to view historical and pending forms in their college. In addition, Associate Deans will be CC on email notifications for any work that needs to be processed greater than 7 days.

- **Deans** – All Deans have access to the appropriate Director of Advising workflow queue. Deans also have the ability to view historical and pending forms in their college. However, Deans will not receive any email notifications of pending work.

- **College Administrative Assistants** – All College Administrative Assistants will have the ability to view historical and pending forms in their college. However, College Administrative Assistants will not have access to the Director of Advising workflow queue. No emails will be generated to the College Administrative Assistants.

- **Department Chairs** – All Department Chairs, including co/associate department chairs, will have the ability to view historical and pending forms in their college. However, Department Chairs will not have direct access to the Director of Advising workflow queue. No emails will be generated to the Department Chairs.

- **Department Administrative Assistants** – All Department Administrative Assistants, including co/associate department chairs, will have the ability to view historical and pending forms in their college. However, Department Administrative Assistants will not have direct access to the Director of Advising workflow queue. No emails will be generated to the Department Administrative Assistants.

- **Provost Office** – Provost Office designees will have the ability to view historical and pending forms in every college. However, Provost Office will not have direct access to the Director of Advising workflow queues. No emails will be generated to the Provost Office.

- **Office of the Registrar** – Office of the Registrar will have the ability to view historical and pending forms in every college. Office of the Registrar will have direct access to all Director of Advising workflow queues, in addition internal processing queues. Office of the Registrar will be able to facilitate moving items between workflows if needed. No emails will be generated to the Office of the Registrar.
**Workflow Diagram**

**FORM ENTRERS HERE**
- Student emailed acknowledgement; custom properties updated

**RO - Incoming Form STPR**
- RO - STPR Entering Division
  - Director of Advising reviews request for any potential problems; updates advisement records in Colleague/Datatel

**RO - Process Decision**
- Reads decision from form
  1. If Approved — updates status; routes to Registrar's office
  2. If Concerned — updates status; emails student; routes back to RO - STPR Entering Division
  3. If Take No Action — updates status; emails student; removes from workflow

**Daily script sends emails instead of using alarms so that we can email based on our SQL table**

**RO - STPR Registrar Process**
- Registrar's Office makes changes in Colleague; applies any applicable Degree Audit overrides/exceptions

**Automated Queue**

**Manual Queue**

**RO - STPR Email Complete**
- Status set to Complete; student emailed; leaving division notified; document removed from workflow
Perceptive Content Overview

What is Perceptive Content?
Perceptive Content (formerly called ImageNow) is a dynamic content management system. In a nutshell, it is software that allows us to manage documents electronically throughout our campus. We can store and retrieve documents, send documents to other users, complete tasks like approving invoice, and sign and approve forms like graduation and graduate admission applications - all electronically.

Logging into Perceptive Content
Access is currently limited to the campus administrative network or off campus via a VPN connection. Use Google Chrome or Safari to access Perceptive Content. Internet Explorer and older browsers are not supported.

- Access the Perceptive Content web client called Perceptive Experience by navigating to the following address:

   https://ccu-inowcontent.coastal.edu:8443/experience/#login

   **Tip:** Bookmark this page

- Log in using your CCU credentials (same as your email / network).
Apps in Perceptive

Once you successfully log into the system, Perceptive Content will display available apps on the Home screen:

Think of these as single apps within a larger structure that work independently of each other. Based on your permissions, you may or may not see all of the apps listed above.

**Tip:** You do not need to use the Capture app or the Task app for this guide.

**Tip:** You can view current and historical forms using the Documents app.

**Tip:** You will need to use the Workflow app to process your decision and route the student form to the Office of the Registrar.

**Tip:** You can always click the icon to be directed back to the Home screen to select a different app.

**Using the Capture App**

You may have multiple roles that allows you to see the Capture App. However, you will not use this app for processing student forms.

**Using the Task App**

You may have multiple roles that allows you to see the Tasks App. However, you will not use this app for processing student forms.
Using the Documents App

Users can search and view historical graduation applications using the Documents App. Think of this app as viewing documents in a ‘filing cabinet’. You use this app to look into the filing cabinet, search through it, select a file, and view the contents of the file.

Use the Documents App in the following scenarios:

- If you want to search or view historical student forms
- If you want to find where a given student form is at during any part of the process
**Using the Workflow App**

Users will actually process the graduation application using the [Workflow App](#). Think of this [app](#) doing actual work on the form.

Use the [Workflow App](#) in the following scenarios:

- If you have work to do
- If you need to route any of your work out of your workflow queue

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**Tip:** Once you complete work in the [Workflow App](#), the document will no longer be in your workflow queue since it has been routed elsewhere. You would need to use the [Documents App](#) if you needed to locate the form for any reason.

**Tip:** If a document has been in the workflow queue before (for example: it was routed back to you), the text will show in blue font.
Understanding Custom Properties

Custom Properties are specific pieces of information about a given document. Each document type in Perceptive Content can have its own set of custom properties. **Student Forms will utilize Custom Properties.** Understanding how custom properties are utilized will make it easier to understand the approval process. Here are some important things to remember regarding custom properties:

- Custom properties always start with the department code.
- The department code for the Office of the Registrar is “RO”. Therefore, all graduation application properties will start with RO.
- You may see other custom properties that relate to other departments (such as Graduate Studies, Registrar’s Office, etc.)
- Even though you can select other custom properties from other departments, you will not receive any results from these (as views limit document types)

- Here is a list of important **Custom Properties** utilized in the Graduation Application:
  - **RO – Athlete:** flag to indicate student athlete
  - **RO – Honor Student:** flag to indicate student participates in the University Honors program
  - **RO – International:** flag to indicate international students
  - **RO – Change Request Type:** type of change request, potential options:
    - **RO – STPR Status:** the **current** status of the request, potential options:
      - **Pending:** all student forms submitted will start off with this status
      - **Pending – Waiting on Student:** this status will be applied when additional conversation with the student is required
      - **Request Withdrawn:** student no longer wishes to process the request
      - **Complete:** indicates the form has been processed by the Office of the Registrar
  - **RO – Request Reason:** If the request removes any piece of the student’s academic program, the student will be required to provide a reason for the change

- **RO – Leaving Dept:** automatically updated at the time of submission (if removing requirements)
- **RO – Leaving Division:** automatically updated at the time of submission (if removing requirements)
- **RO – Entering Dept:** automatically updated at the time of submission (if adding requirements)
- **RO – Entering Division:** automatically updated at the time of submission (if adding requirements)
How to Search/Find Change of Academic Program Forms using Predefined Filters

1. Click the Documents App from the Home Screen:

![Documents App](image)

2. Click and expand the appropriate Document View on the left-hand side of the screen.

   TIP: The name of the Document Views will start with RO. Each college has their own Document View. Example: RO – ED Student Program Changes

3. Select the desired filter (filter options will be based on permissions granted)

   Tip: Views are typically limited to 500 results

   Tip: Student IDs must be entered as 7 digits (include any necessary leading 0)

   Tip: Student Name should be entered in the following format:
   Last name, First name, Middle Name

   Tip: The percent symbol % acts as the wildcard. Ex: %John will return all applications that have ‘John’ anywhere in the name field (First, last, or middle).

4. Click on the Search button located on the right of the screen.
How to Create a New Search

If a pre-defined filter does not satisfy the request, users can build their own searches. To create a new search, complete the steps below:

1. Click anywhere in the “Search in [View Name]:” window located to the left of the Search button. You should see the following:

2. From the left drop-down, select one of the available field parameters.
   **Tip:** The NAME constraint is not the student’s name. It is the student’s confirmation number from the email notification generated after the student applied for graduation via WebAdvisor.

3. From the second drop-down, select an operator.

4. Depending on your previous selections, type or select a search parameter in the third field.

5. Select Add to complete the constraint. **Do not forget this step.** Your search will not work without adding the constraint.

   **Tip:** To utilize multiple constraints in a single search, select Add and repeat steps 2 through 6.
   **Tip:** To change from an AND to an OR constraint statement, click the word “AND”.

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How to View Document Properties

In the Properties pane, users can display key and custom property values that pertain to the document.

1. Open the document using the Documents App or the Workflow App

2. In the viewer, click the Show or Hide Properties icon to show or hide the document properties.

   ![Show or Hide Properties Icon]

   **TIP:** Depending on your screen size, you might need to click the down caret to view all icons.

Now, you can view specific properties related to the document.

![Property View Example]
How to View Related Documents

1. In the viewer, click the Show or Hide Related Documents icon. The Related Documents pane should now appear. You may drag a pane’s perimeter to resize accordingly.

2. In the Relationship list, select RO – View All Student Program Changes. A list of other graduation applications received for the applicant will appear. Double click on any document listed to open the document in a new viewer window. Simply close the new window when you wish to return to the main application view. You may also wish to close the related documents pane to save space. Remember that you can always recall it by selecting Show or Hide Related Documents.

**Tip**: This view is only available to the Director of Advising, and designee(s).

How to Turn off Thumbnails

In this workflow process, you should not need to view thumbnails. It is recommended to turn off thumbnails for additional viewing space of the form.

**Tip**: If the curiosity in you wants to know about this function, it is helpful in viewing multiple pages in a document. However, since the Change of Academic Program is an online form, there are not multiple pages to the document.

1. Open the document using the Documents App or the Workflow App

2. In the viewer, unselect Show or Hide Thumbnails to hide thumbnails.

Simply click on icon to toggle on/off
Change of Academic Program Form

Use the Workflow App or the Documents App to locate desired form. Click on any document or workflow result to open the graduation application.

You will first see Student Information that will include student program data at the time the student completed the form (prior to any change).

Next, you will see the Request Type, which will indicate what action the student intends to take.
The final section of the form includes an **Internal Use Only** section.

Please note the following:

- **Internal comments** will still be part of this document, and thus, part of the student’s academic record. This means that students could request to view their records, including your comments.
- **Internal comments** are permanent and cannot be removed.
- The **Comments to Student** is only utilized if the **Decision** is set to **Pending – Waiting on Student**.
Making a Decision

It is recommended to view Related Documents for additional program changes that may have been submitted (or processed) for the student.

One of the following decisions must be made:

- **Approve** – This is the happy path that means the program change is ready to be processed by the Office of the Registrar

- **Approve with Modifications** – this option means that the program change is ready to be processed, but there are modifications from the original request. Examples may include putting students into a pre-major vs complete major, changing the concentration from the student’s original selection, etc. This decision is meant to be a flag to the Office of the Registrar that the form needs to be processed with special instructions included in the internal section of the form.

- **Pending – Waiting on Student** – This option means that there may be some concerns, and additional conversation with the student is required. Any text in the Comments to Students will be emailed to the student. In addition, the status of the form (RO – STPR Status) will be updated to Pending – Waiting on Student. Any form at this status will not trigger emails to associate deans.

- **Request Withdrawn** – This option means that the request will not be processed. An example may include a student changing their mind after realizing the impact to progress towards degree.

Once a decision is made, the username and time/date stamp will automatically be applied.

Next, you need to route the document forward.
Routing a Document Forward

No matter the decision that you make, you will need to always Route Forward. This is because predetermined routing paths have already been confirmed. Even if the decision on the form is to withdraw the request, you will always choose Route Forward so that the document can go on its predetermined path.

Tip: You must be using the Workflow App in order to route a document out of your workflow. If you are viewing the application in the Documents App, you will need to click on the Open in Workflow icon.

After a decision has been made, route the document forward using the following steps.

1. Using the Workflow App, open the application.

2. Click the Route Forward icon from the toolbar

That’s it! The next workflow queue will read your decision and process accordingly.
Additional Support

If you need additional support, please contact:

Office of the Registrar
Baxley Hall, Room 222
843-349-2019
registrar@coastal.edu