Office of the Registrar
Online Graduation Application eForm Workflow

Contents

Graduation Application Overview ................................................................. 2
Summary of the Graduation Application Process ........................................... 2
How does the approval process start? ............................................................. 2
Roles for Approving Graduation Applications .............................................. 3
Verifying Additional Program Requirements .............................................. 4
Perceptive Content Overview ........................................................................ 5
What is Perceptive Content? ......................................................................... 5
Logging into Perceptive Content ................................................................. 5
Apps in Perceptive ....................................................................................... 6
Using the Capture App ................................................................................. 7
Using the Task App ..................................................................................... 7
Using the Documents App .......................................................................... 7
Using the Workflow App ........................................................................... 8
Understanding Custom Properties .............................................................. 9
How to Search/Find Graduation Applications using Predefined Filters ........ 11
How to Create a New Search ...................................................................... 13
How to View Document Properties ............................................................ 14
How to View Thumbnails .......................................................................... 15
How to Related Documents ...................................................................... 16
Graduation Application Form ....................................................................... 17
Uploading a Program Evaluation or Other Supporting Documentation ........ 19
Making a Decision ..................................................................................... 21
Routing a Document Forward .................................................................... 22
Additional Support ................................................................................... 24
Appendix A: Graduation Flowchart ............................................................ 25
Graduation Application Overview

Summary of the Graduation Application Process

Graduation applications are processed through electronic workflows using a software called, Perceptive Content. A workflow is simply an organized collection of processes (or steps) that need to be completed in order to accomplish some given task. An electronic workflow allows this to happen through using software and leveraging workflow queues instead of shuffling papers around from one office to the next. For instance, graduation applications ready for your reviewing will be available to you in a workflow “queue” (e.g. a “folder”) that you can access from your computer. Once you complete your work (in other words, your review), you will now “route” this document to the next predetermined workflow queue as opposed to physically walking it over to the next office. The application will continue a pre-determined path until it is fully approved by the Academic Adviser, Department Chair, and Dean. Next, the application is routed to the Office of the Registrar for final auditing. There are many benefits to this system including increased efficiency and accountability. We can also see where a graduation application is located at throughout the entire process.

How does the approval process start?

Graduation application starts with communication between the student and the Academic Adviser. The student’s Program Evaluation should be reviewed and additional requirements not listed on the Program Evaluation should be discussed. Students should register for their remaining classes to ensure their Program Evaluation has a status of ‘Pending Anticipated Complete’.

After this advisement session is completed, the student is ready to apply online through WebAdvisor. Students will pay their application fee at the start of the process.

Tip: Students can also pay in person at the Office of Student Accounts. Payment section of the online application will be bypassed.

Tip: Students that are reapplying for the same program (e.g. from previous denial or any other reason) will not be required to repay the application fee (the payment section of the online application will be bypassed). However, students will need to pay and apply for each separate degree.

After the student completes the application online via WebAdvisor, the student will receive an email notification with a unique confirmation number. Next, the application routes for the necessary approvals.
Roles for Approving Graduation Applications

There are three main roles as it relates to approvals. It is important to understand each of them.

- **Academic Adviser** – The first “stop” for the graduation application is with the Academic Adviser. The academic adviser should review entire the program evaluation, including all majors, minors, and certifications. The adviser will upload a program evaluation into the system and make any notes of additional graduation requirements not listed on the program evaluation. The academic adviser will choose to approve or deny the application and route forward based on the decision (to be discussed later).

  - **Tip:** Students transferring in remaining coursework will not have a ‘Pending Anticipated Complete Status’. Please continue to process these forward with appropriate documentation.

  - **Tip:** Academic Advisers should review the entire program evaluation, including additional majors and minors. The specific requirements will be checked by the Department Chair and Dean of the appropriate program.

- **Department Chair or Program Coordinator Designee Role** - Once the academic adviser approves the application to go forward, it will be routed the Department Chair of the student’s first major for additional review. The Department Chair is responsible for verifying that the program requirements in Program Evaluation are accurate and pending complete for the student’s first major, in addition to any other requirements not listed on the Program Evaluation. The Department Chair or Program Coordinator Designee will choose to approve or deny the application and route forward based on the decision (to be discussed later).

- **Dean of College or Designee Role** – Once the Department Chair or Program Coordinator designee approves the application to go forward, it will be routed the Dean of the College for an additional review of the student’s first major requirements. The Dean’s Office is also responsible for verifying that the program requirements in Program Evaluation are accurate and pending complete for the student’s first major, in addition to any other requirements not listed on the Program Evaluation. The Dean of the College or Designee will choose to approve or deny the application and route forward based on the decision (to be discussed later).
Verifying Additional Program Requirements

The process from Department Chair to the Dean of the College will repeat for each additional program requirement until all program requirements have been reviewed. For further clarification, think of a student that has 3 majors, 3 minors, 3 certifications, and University Honors Program. The routing process start with the Academic Adviser of Major 1, then goes to the Department Chair of Major 1, Dean of Major 1, Department Chair of Major 2, Dean of Major 2, Department Chair of Major 3, Dean of Major 3, and then it will cycle through the minors; Department Chair of Minor 1, Dean of Minor 1, Department Chair of Minor 2, Dean of Minor 2, and so forth. Then the workflow will cycle through the certificates by starting with the Department Chair of Certificate 1, Dean of Certificate 1, Department Chair of Certificate 2, Dean of Certificate 2, and so on. University Honors Program requirements are checked last if the student is flagged as a University Honors Program participant. There is some intelligent scripting in place such that if a student does not have, let’s say, a second minor, it will pass and go directly on to the next item the student does need approval.

Also see the Graduation Workflow for additional explanation.

There may be times that a graduation application is routed to a privileged user that wears multiple hats. For instance, if you are the student’s first major academic adviser, and also the signing coordinator for the student’s minor, the application will be routed to you in two different instances (but under different workflow queues).

Once the application has completed all necessary approvals, the application will be routed to the Office of the Registrar, where it will be reviewed again. The Office of the Registrar may route items back for additional clarification as needed. In the end, a final determination will be made and the student will be notified via email requesting the student to check the status of their application through WebAdvisor’s Graduation Application Status link.
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. The following workflows are examples of processes supported by Perceptive Content at Coastal Carolina University:

- Undergraduate Admissions
- Graduate Admissions
- Graduation Application (Registrar’s Office)
- Office of Student Accounts
- Accounts Payable
- Payroll

This documentation guide will focus on the Graduation Application process within Perceptive Content.

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:

Tip: You do not need to use the Capture app when processing graduation applications.

Tip: You can view current and historical graduation applications using the Documents app.

Tip: You do not need to use the Task app when processing graduation applications.

Tip: You will need to use the Workflow app to make your decision and route the graduation application.

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 graduation applications.

**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 graduation applications.

**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 graduation applications
- If you want to find where a given graduation application is at during any part of the approval process
- If you are an Academic Adviser and you want to view a list of graduation applications waiting for your review
Using the Workflow App

Users will actually process the graduation application using the Workflow App. Think of this app doing actual work on the application.

Use the Workflow App in the following scenarios:

- If you want to approve or deny a graduation application
- If you need to route any of your work out of your workflow queue

Tip for Academic Advisers: Graduation applications are initially routed to a queue based on the student’s major, regardless of adviser. Academic Advisers are given access to major-specific workflow queues based. Multiple Academic Advisers may be assigned to the same workflow queue. Therefore, Academic Advisers may see applications using the Workflow App that are not their advisees. This allows departments to cover for their coworkers in the case of an absence.

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 and you would need to use the Documents App if you needed to locate the application 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. The Graduation Application heavily utilizes 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 – Final Status** This status will provide an overall status throughout the approval process. Potential values include:
  - **In Progress** – The application is under review (by Academic Adviser, Department Chair, Dean, or the Registrar’s Office).
  - **Approved** – The application has been approved
  - **Denied** – The application has been denied and is no longer under any review.

[Remaining Custom Properties For Advanced Users Only]

- **RO – Graduation Semester** The term the student plans to graduate in YY/SS format
  - Fall = FA
  - Spring = SP
  - Maysemester = MY
  - Summer I = S1
  - Summer II = S2
  
  **Note**: Currently, graduation cycles are only during Fall, Spring, and Summer II.
  **Examples**: 20/FA, 20/S1

- **RO – Adviser** The username of the Academic Adviser (does not include @coastal.edu)

- **RO – Catalog** The 4 digit catalog year of the student’s program

- **RO – Program** Colleague program string listed with 3 components: ACADEMIC LEVEL Degree_MAJOR CODE (Example: GR_MAT_EDUC Graduate Program(GR) for Master of Arts in Teaching (MAT) in Education(EDUC))
• Any program string starting with UG indicates an undergraduate program
• Any program string starting with GR indicates a graduate program

• RO – Honor Student  Flag Y/N to indicate if the student is completing the University Honors Program

• RO – Program Major 1  Colleague major code* that consists of 3-5 characters
• RO – Program Major 2  Colleague major code* that consists of 3-5 characters
• RO – Program Major 3  Colleague major code* that consists of 3-5 characters

• RO – Program Minor 1  Colleague minor code* that consists of 3-5 characters
• RO – Program Minor 2  Colleague minor code* that consists of 3-5 characters
• RO – Program Minor 3  Colleague minor code* that consists of 3-5 characters

• RO – Program Certificate 1 Colleague certificate code* that consists of 3-5 characters
• RO – Program Certificate 2 Colleague certificate code* that consists of 3-5 characters
• RO – Program Certificate 3 Colleague certificate code* that consists of 3-5 characters

* Please Contact the Office of the Registrar for a current list of codes and definitions.
How to Search/Find Graduation Applications using Predefined Filters

1. Click the Documents App from the Home Screen:

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 the department code.

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

   • Academic Advisers should have a Document View called RO – See My Docs. Department Chairs

   Tip: Use *My Grad Apps (Need Work) to find applications that are waiting action from you
- Department Chairs should have a Document View called RO – DEPT <<Major>> All Graduation Apps

- Deans should have Document View called RO – Dean <<Division Level>> All Graduation Apps

**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.

**Tip:** You can click the header of any result table to sort by that value
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:

   ![Add Constraint: Name](Example Image)

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”.

-13-
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](image)

![Document properties](image)
How to View Thumbnails

In the Thumbnails pane, users can click a different page of a multiple-page item to display it in the Page pane.

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

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

The thumbnails should show on the right-hand side of the screen:
How to 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 Other Grad Apps. 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.
Graduation Application Form

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

The application will load:

You will first see the information that the student completed.

If you scroll down, you will see an area for academic advisers to upload the program evaluation (or other supporting documents):
If you continue to scroll on the application form, you will also notice that each major, minor, and certification requirement has its own block for program modifications, comments, decisions, and signatures.

**Example of dual Major: 2 separate blocks (1 for each major)**

<table>
<thead>
<tr>
<th>Major - Communication</th>
<th>Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Note: When modifying any graduation requirements, the individual making the modification(s) must notify the student.</td>
</tr>
<tr>
<td></td>
<td>The above requirements modifications currently:</td>
</tr>
<tr>
<td></td>
<td>Comments:</td>
</tr>
<tr>
<td></td>
<td>Add Comment</td>
</tr>
<tr>
<td></td>
<td>Approx/Exprm</td>
</tr>
<tr>
<td></td>
<td>Signature of Adviser</td>
</tr>
<tr>
<td></td>
<td>Signature of Department Chair/Program Coordinator/Degree</td>
</tr>
<tr>
<td></td>
<td>Signature of Dean of College or Degree</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Major - Middle Level Education</th>
<th>Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Note: When modifying any graduation requirements, the individual making the modification(s) must notify the student.</td>
</tr>
<tr>
<td></td>
<td>The above requirements modifications currently:</td>
</tr>
<tr>
<td></td>
<td>Comments:</td>
</tr>
<tr>
<td></td>
<td>Add Comment</td>
</tr>
<tr>
<td></td>
<td>Approx/Exprm</td>
</tr>
<tr>
<td></td>
<td>Signature of Adviser</td>
</tr>
<tr>
<td></td>
<td>Signature of Department Chair/Program Coordinator/Degree</td>
</tr>
<tr>
<td></td>
<td>Signature of Dean of College or Degree</td>
</tr>
</tbody>
</table>
Uploading a Program Evaluation or Other Supporting Documentation

When you run a Program Evaluation, the output is displayed in your web browser as an HTML document. Unfortunately, HTML documents cannot be loaded into the Perceptive Software Content. Therefore, you will first need to convert your Program Evaluation document to a PDF document.

Once you run the Program Evaluation (either through Datatel or WebAdvisor), simply print to a PDF printer.

Remember where you save it! (You’ll need to locate it in the next step.)
In Perceptive Content, you will now need to upload the PDF document. Follow these steps:

1. Open the graduation application using the **Workflow App**

2. Click the ![icon](icon.png) on the top toolbar to add a file

3. **Double-click File** as your capture source *(or single-click File and click **Done**)*

4. Click **Browse**:

5. Navigate to where you saved the file:

6. You should be able to see the document you uploaded through viewing **Thumbnails**.
Making a Decision

Each program requirement (e.g. majors, minors, certs) has its own block for program requirement modifications, comments, signatures, and decisions. It is very important to document any additional graduation requirements and inform the student of such requirements.

For example, a major being approved may be contingent on a specific minor being approved as well. This would be a great example to list under the Modifications “Add Requirements” area. There may be other things that Program Evaluation does not list, like defending a thesis or passing a particular exam. These requirements need to be clearly listed and conveyed to the student. Another great example is to include information about a student transferring in their remaining coursework.

In addition, each block requires the signature of the Academic Adviser, Department Chair or Program Coordinator Designee, and the Dean of the College Designee. Once you make a decision and click “Add Signature”, a system stamp that contains the user and date is automatically applied to the graduation application. You cannot undo your signature, but you can change your decision (based on updated information) and make notes about such changes in the comment section.

One of the following decisions must be made at each level for each program requirement:

- **Approve** – This is the happy path that means this graduation application is ready for the next step in the process.

- **Deny Application** – This option could mean a “soft” deny or a “hard” deny. A “soft” deny may indicate that this application is missing something to make it acceptable, like a course substitution. A “hard” deny is an application that does not have any hope of being approved. An example of this may be that a student needs to apply for a different term.

- **Deny This Portion** – This option should only be used if the application can go forward without this “piece” being approved. An example of this situation occurring is an application may still go forward, but a second minor is not going to be completed. It’s not worth denying the entire application. Be sure the end-date the minor, additional major, or certification that will not be completed in Datatel.
**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 an application is denied, 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.

3. Choose the appropriate route based on your role.

**Adviser Routing Options**

- **Adviser Deny** – This option is considered a “soft” deny. Choosing this path will email the student alerting that there are questions surrounding his/her graduation application and encourages the student to reach out to the Academic Adviser and/or the Department Chair. Next, the application will route back to the adviser’s work queue because students simply do not have Perceptive workflow accounts. However, the text color of the application will change color to blue to indicate that the application has been in this workflow before.

- **Route to Chair** – This is the highlighted default happy path. Choose this path if the application is approved and should go to the Department Chair or Program Coordinator Designee for an additional review. Remember that “Deny this Portion” decisions can still route by this path, pending that the piece that is being denied should not hold up the application from moving forward.

- **Route to Ineligible Apps** – Choose this option if you wish to “Hard Deny” the application as it should not have been submitted and needs to be removed from the workflow. An example of this would be an application that never makes it to the Office of the Registrar. Students and academic advisers are emailed when this...
option is selected indicating that the student’s graduation application cannot be completed at this time.

**Department Chair or Program Coordinator Designee Routing Options**

- **Chair Deny** – This option is considered a “soft” deny. Choosing this path will email the student and academic adviser alerting that there are questions surrounding their graduation application and encourages the student to reach out to the Academic Adviser and/or the Department Chair. Next, the application will route back to the adviser’s work queue for additional work.

- **Route to Back to Registrar** – Only use this path if the Office of the Registrar has returned an application to you for additional information. Be sure you have updated the comments field with your response before sending this back.

- **Route to Dean** – This is the highlighted default happy path. Choose this path if the application is approved and should go to the Dean of College Designee for an additional review. Remember that “Deny this Portion” decisions can still route by this path, pending that the piece that is being denied should not hold up the application from moving forward.

- **Route to Ineligible Apps** – Choose this option if you wish to “Hard Deny” the application as it should not have been submitted and needs to be removed from the workflow. An example of this would be an application that never makes it to the Office of the Registrar. Students and academic advisers are emailed when this option is selected indicating that their graduation application cannot be completed at this time.

**Dean of College Designee Routing Options**

- **Dean Deny** – This option is considered a “soft” deny. Choosing this path will email the student and department chair alerting that there are questions surrounding their graduation application and encourages the student to reach out to the Department Chair. Next, the application will route back to the Department Chair’s work queue for additional work.

- **Route to Back to Registrar** – Only use this path if the Office of the Registrar has returned an application to you for additional information. Be sure you have updated the comments field with your response before sending this back.

- **Update Level and Route** – This is the highlighted default happy path. Choose this path if the application is approved and should go to the next program requirement (if any) for review. Remember that “Deny this Portion” decisions can still route by this path, pending that the piece that is being denied should not hold up the application from moving forward.

- **Route to Ineligible Apps** – Choose this option if you wish to “Hard Deny” the application as it should not have been submitted and needs to be removed from the workflow. An example of this would be an application that never makes it to the Office of the Registrar. Students and academic advisers are emailed when this option is selected indicating that their graduation application cannot be completed at this time.
Additional Support

If you need additional support, please contact:

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

You may also visit the following websites:

https://www.coastal.edu/info/facstaff/perceptivecontent/
https://www.coastal.edu/commencement/
Appendix A: Graduation Flowchart

1. **Student & Adviser Communicate About Graduation**
   - **Student Applies for Graduation Via WebAdvisor**
   - **Application is routed to adviser where adviser reviews, uploads Program Evaluation**
   - **Deny**
     - **Email goes out to requesting the student to contact the Adviser and/or Department Chair**
     - **Approve**
       - **Application is routed to department chair for additional approval**
       - **Deny**
         - **Email goes out to student & adviser requesting student to contact adviser and/or department chair**
         - **Approve**
           - **Application is routed to Dean’s Office for additional approval**
           - **Deny**
             - **Email goes out to student & department chair requesting student to contact department chair**
             - **Approve**
               - **Application is routed to the Office of the Registrar for final verification**
               - **Deny**
                 - **Student is emailed once a final determination has been made**

**Student should check their Coastal email address regularly for any emails requesting action!**

Student can check the status of the graduation application throughout the entire process via WebAdvisor.