Office of the Registrar
Special Permission to Enroll and/or Drop Class(es)

Contents

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

Use **Google Chrome or Safari** to access Perceptive Content. Internet Explorer and older browsers are not supported.

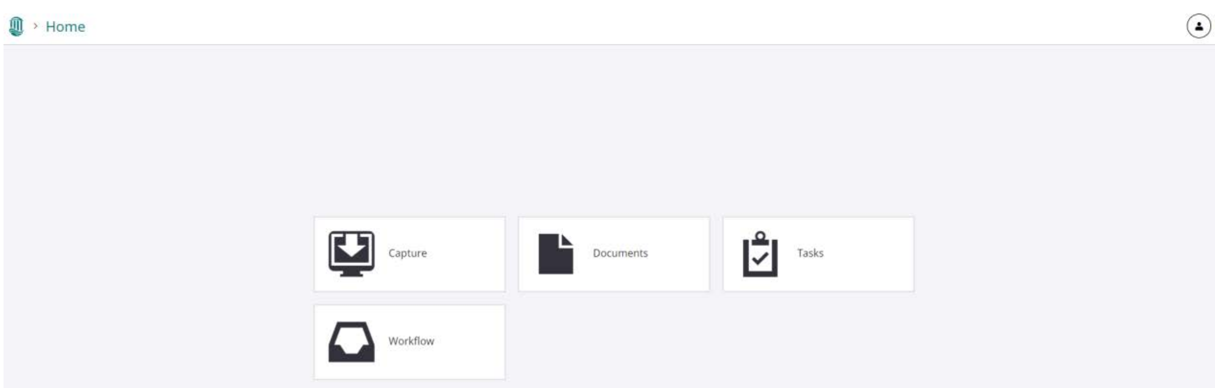
- Access the Perceptive Content web client called Perceptive Experience by navigating to the following address:

  https://**docs.coastal.edu**
  Tip: Bookmark this page

- Login is associated to your CCU network credentials (same as your email). Single Sign On (SSO) will automatically log you into the system.

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

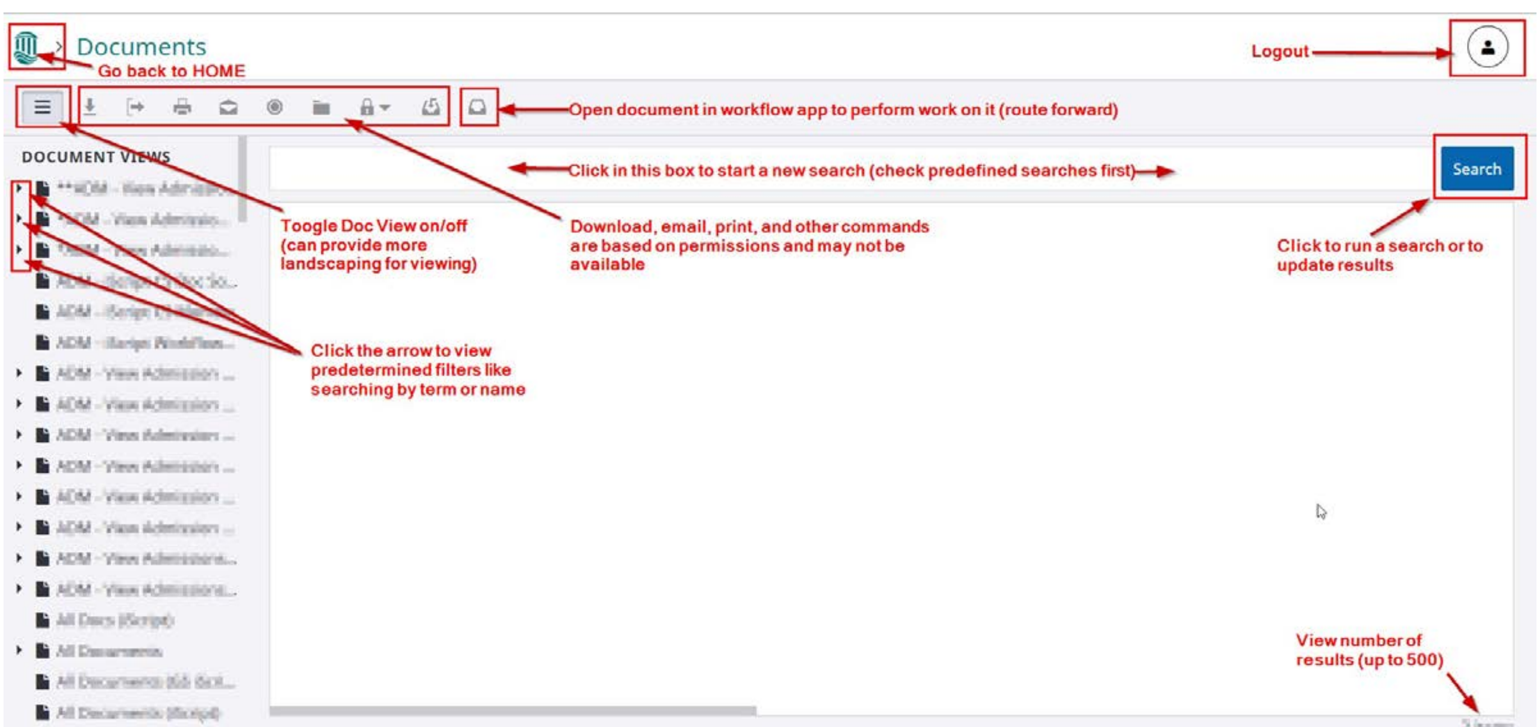
You may have multiple roles that allows you to see the **Tasks App**. However, you **will not** use this app for processing student forms.

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

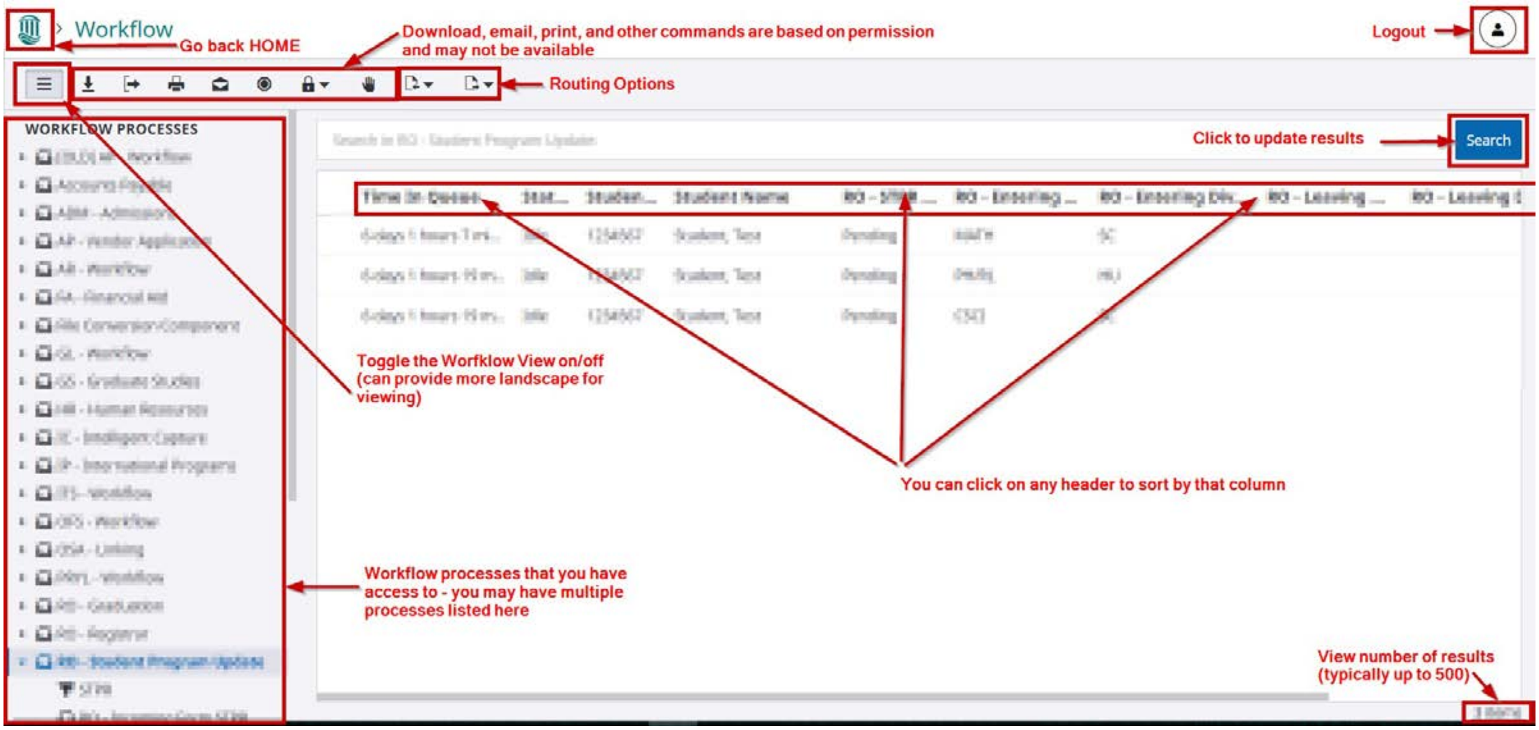


Using the Workflow App

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



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.

Understanding Custom Properties

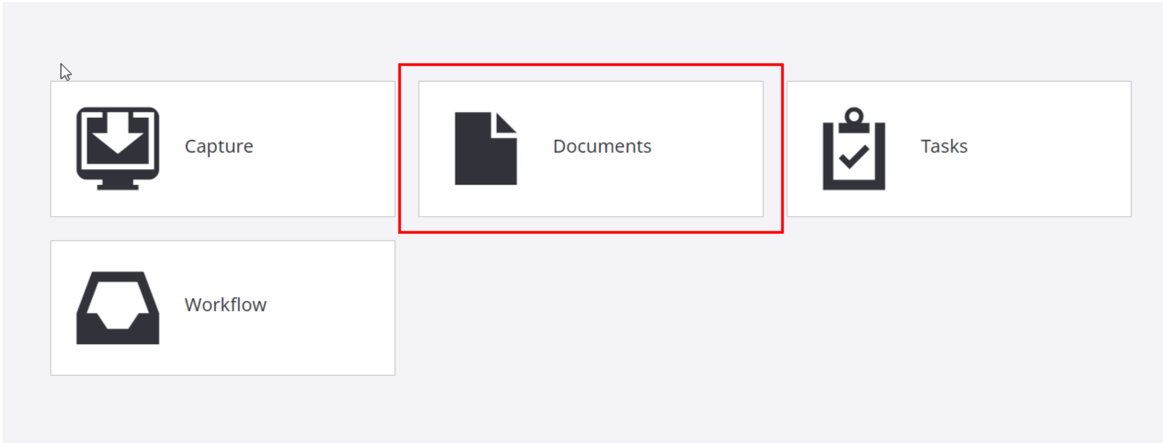
Custom Properties are specific pieces of information about a given document. Each document type in Perceptive Content can have its own set of *custom properties*. **Student Forms will utilize Custom Properties.** Understanding how *custom properties* are utilized will make it easier to understand the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

- **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 – Adviser Username**: designated adviser of record
- **RO – Status:** the ***current*** status of the request, potential options:
  Pending
  Processed
  Unable to Process
- **RO – Processed:** date the form was processed in Colleague, if processed
- **RO – SP Add Class List**: *composite property** that consists of:
  - **RO – SP Add Class**: Holds course section name
  - **RO – SP Add Class Dept**
  - **RO – SP Add Class Div**
- **RO – SP Drop Class:** *composite property** that consists of:
  - **RO – SP Drop Class**: Holds course section name
- **RO – Student Division List:** *composite property** that consists of:
  - **RO – Student Division**: Holds the division the student belongs to

*A **composite property** allows the user to enter multiple values for a single **property**. Values must conform to the data types of the associated custom **properties**.

How to Search/Find Documents 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 RO. Each college has their own *Document View*. *Example*: **RO – BS Reg Special Perm**

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

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.
   <u>Tip</u>*:* The NAME constraint is <u>not</u> 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.

6. Select **Search**.

   <u>Tip</u>: To utilize multiple constraints in a single search, select **Add** and repeat **steps 2 through 6**.

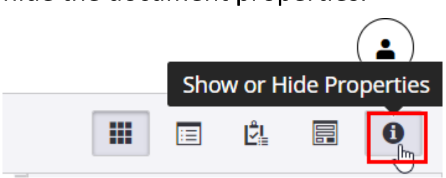
   <u>Tip</u>: To change from an AND to an OR constraint statement, click the word "**AND".**

How to View Document Properties

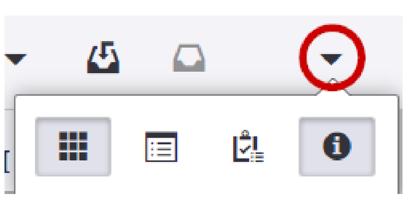
In the Properties pane, users can display key and custom property values that pertain to the document.

1. Open the document using the [Documents App]() or the [Workflow App]()

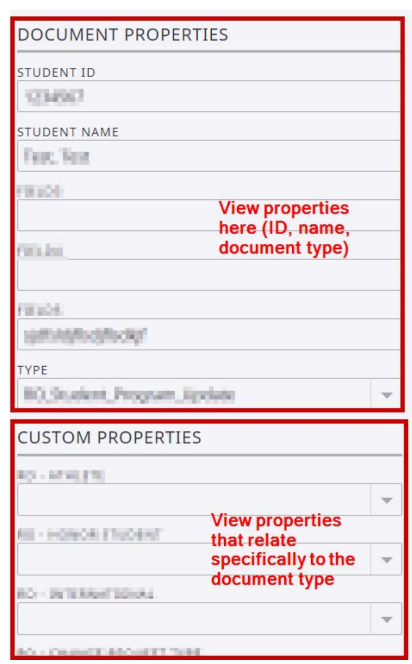
2. In the viewer, click the **Show or Hide Properties icon** to show or hide the document properties.



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

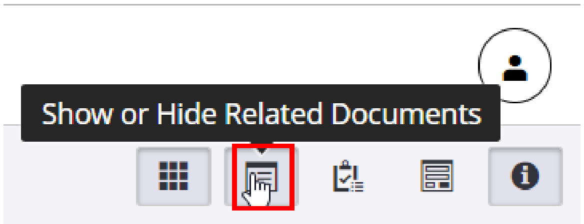


Now, you can view specific properties related to the document.

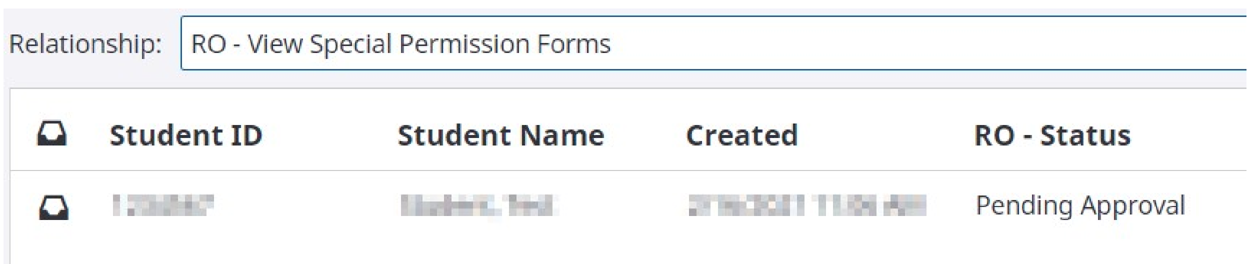


How to View Related Documents

1. In the viewer, click the **Show or Hide Related** **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 Special Permission Forms**. A list of other special permission forms received for the student 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** .

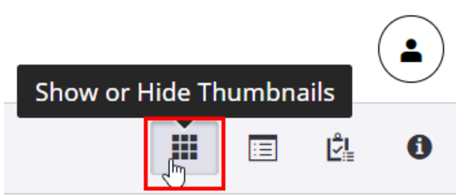


How to Turn off Thumbnails

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

Special Permission Form Details

Overview

Students, faculty, and staff will utilize an online form to enroll and/or drop in the following situations:

- When a student requests entry into a course, which has been filled to capacity (no seats available)
- When a student requests entry into a course, which requires special permission from the instructor or department chair
- When a student requests entry into a course which has a class restriction (freshman, sophomore, junior, senior, major, program)
- When a student requests an Academic Hours Overload to enroll in more than the maximum hours within a specific term, as defined in the University Catalog
- When a student requests entry into a course for which co-requisites and/or pre-requisites have not been met
- When a student requests to drop a class after the drop/add period

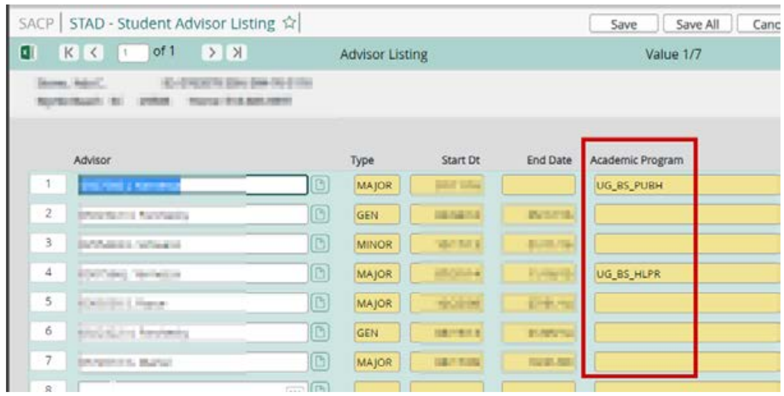
The person that is completing the form is stored in a hidden field. This allows us the opportunity to potentially bypass workflow in specific situations. When authorized individuals complete the form on behalf of the student, approval is automatically granted for areas in which the authorized individual has authority. For example, if an advisor completes a form for *one of their advisees*, the required advisor's approval is automatically granted. However, if a student completes a form, the adviser's approval will be requested.

Forms are **term-specific** and allow up to a **maximum of 5 classes to be dropped and/or added** per form submission. Here is some basic information:

- All classes listed on the form must be for **the same term**

- The form will require the following approval(s):
  - Student's academic adviser will always be required
    - Although a student might have multiple advisers, only **<u>one</u>** academic adviser will be selected as the **primary academic adviser**
    - All academic advisers will receive email notifications on actions taken (e.g. when a form is submitted, (if) denied, (if) approved.
    - The **primary academic adviser** will be the only adviser to receive notifications for *work* needed. Think of it as we want all advisers to know what's going on, but a single adviser will be chosen to be responsible for doing actual work on the form
    - The **primary academic adviser** is chosen by a rating system:
      - Advisement types of HONOR, MENTOR, and MINOR are excluded from consideration
      - If there is only 1 adviser listed in Colleague, then it is naturally selected as the adviser's primary
      - If there are multiple advisers listed in Colleague, they are sorted from newest start date to oldest start date:

            - Advisements can be linked to a student’s academic program, although not required. If the student’s academic program exactly matches the advisement academic program, this adviser is selected as the **primary academic adviser**.



            - If a match to the academic program cannot be determined, then the system tries to match the Adviser Department to the Student’s primary major department
                - Example: A student has multiple advisers for, say, multiple majors. We want to select the adviser that is listed with the primary major
            - Next, we will try to find a match with the student’s primary major’s College to an adviser that’s in the same College.
    - If a student is below full-time status for major terms (Fall/Spring), International Admissions (Center for Global Initiatives) must approve

    - If a student athlete is below full-time status for major terms (Fall/Spring), athletics must approve

    - If a student is adding a class, the department chair of the *specific class*
        - Example: Permission to get into a full BIOL class will go to the BIOL department chair
        - The form will “split” and go to as many department chairs it needs at the same time. *Example*: Form has 3 classes for special permission. All classes are from different departments, MATH, BIOL, ENGL. All three dept chairs will get a copy of the form at the same time. Once all three have completed, it will go to the next step.

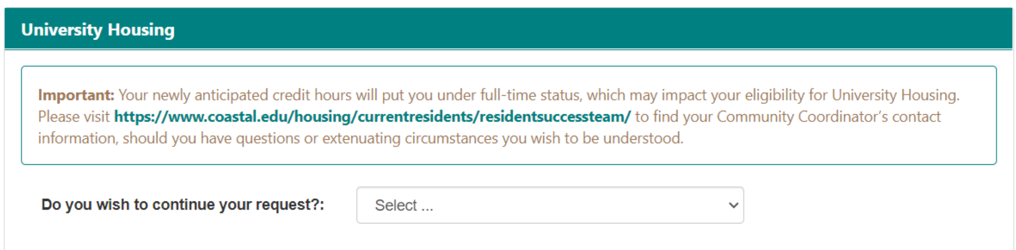
    - If the registration will put a student into academic overload, the dean of the student’s major will be required

- The student must be **eligible to register** in order to submit this form
    - **ADF/ADS holds** – the form will allow students to still register with **ADF/ADS** holds, pending the chosen term does not a corresponding **ADF/ADS** hold.

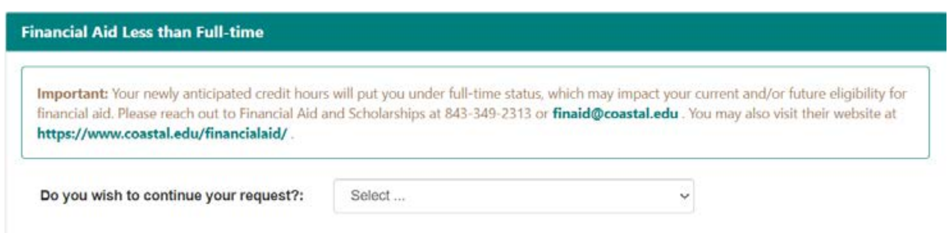
- **SUS** holds – these holds limit the overall number of hours that a student is allowed to register. The form will allow students to still register **up to the sus credit limit**; this cannot be overridden
  - If a student has multiple SUS holds, the most restrictive SUS hold will be used
- Courses that are variable credit will be **required** to enter the requested number of hours; this will be calculated in the overall credit hours

- Classes that have already been graded are not eligible to be dropped (and will not be displayed). Classes that have past the W period are not eligible to be dropped

- Students that have University housing will be displayed a message if they go below full-time status for major terms only (Fall/Spring)
  - Actions will still be permitted



- Students that have Financial Aid, which requires **full-time status**, will receive a message if they go below full-time status
  - Actions will still be permitted



- Students that have Financial Aid, which requires **half-time status**, will receive a message if they go below half-time status
  - Actions will still be permitted

- For students with financial aid **summer terms** only:
  - A warning will be displayed **if** net hours are reduced

- Registration appointment times will not be checked as the Office of the Registrar processes Special Permission forms regardless of registration appointment time, so long as registration is open for the given term

- Students cannot drop all eligible courses without adding additional courses
  - Students must have a net credit hour (assuming the form will be approved) of greater than 0

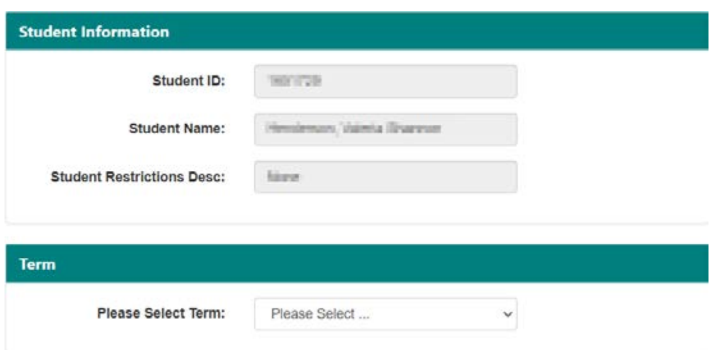
- **Important: Time conflicts in student schedule are not checked in this form!**
- **Important: This form doesn't check if the student has already completed a class and not eligible for retake**
- **Important: You can add the same class multiple times in this form!**
- The form can look **slightly different**, based on the user completing the form.

  Faculty and Staff

  - Form will display a Student Lookup section
    Important: Faculty and Staff *that are also current students* attempting to complete this form will be required to enter their student ID.

  Students

  - There's no area to enter a student ID because students can only submit a form for themselves



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.

Students will receive an email confirmation after submission and a final email after the form has been completely processed.

How Faculty & Staff Access the Form

Although students will be encouraged to initiate this process, all Faculty and Staff can submit a **Special Permission** form on behalf of the student at: https://www.coastal.edu/forms.

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

If you are a faculty or staff member initially completing the form, you will see a section for a student lookup:

Academic Advisors, chairs, and deans can approve/view special submitted Special Permissions via Perceptive Content.

Workflow Roles

- **Academic Advisers** – There are a total of **5 Registration Academic Adviser** workflow queues, one for each college. **Academic Advisers** will receive daily emails on work that needs to be completed.

- **Associate Deans** - There are a total of **5 Registration Dean** workflow queues, one for each college. **Associate Deans** will receive daily emails on work that needs to be completed.

- **Deans** –**Deans** have access to **all workflow** queues within their college. **Deans** do not receive any emails.

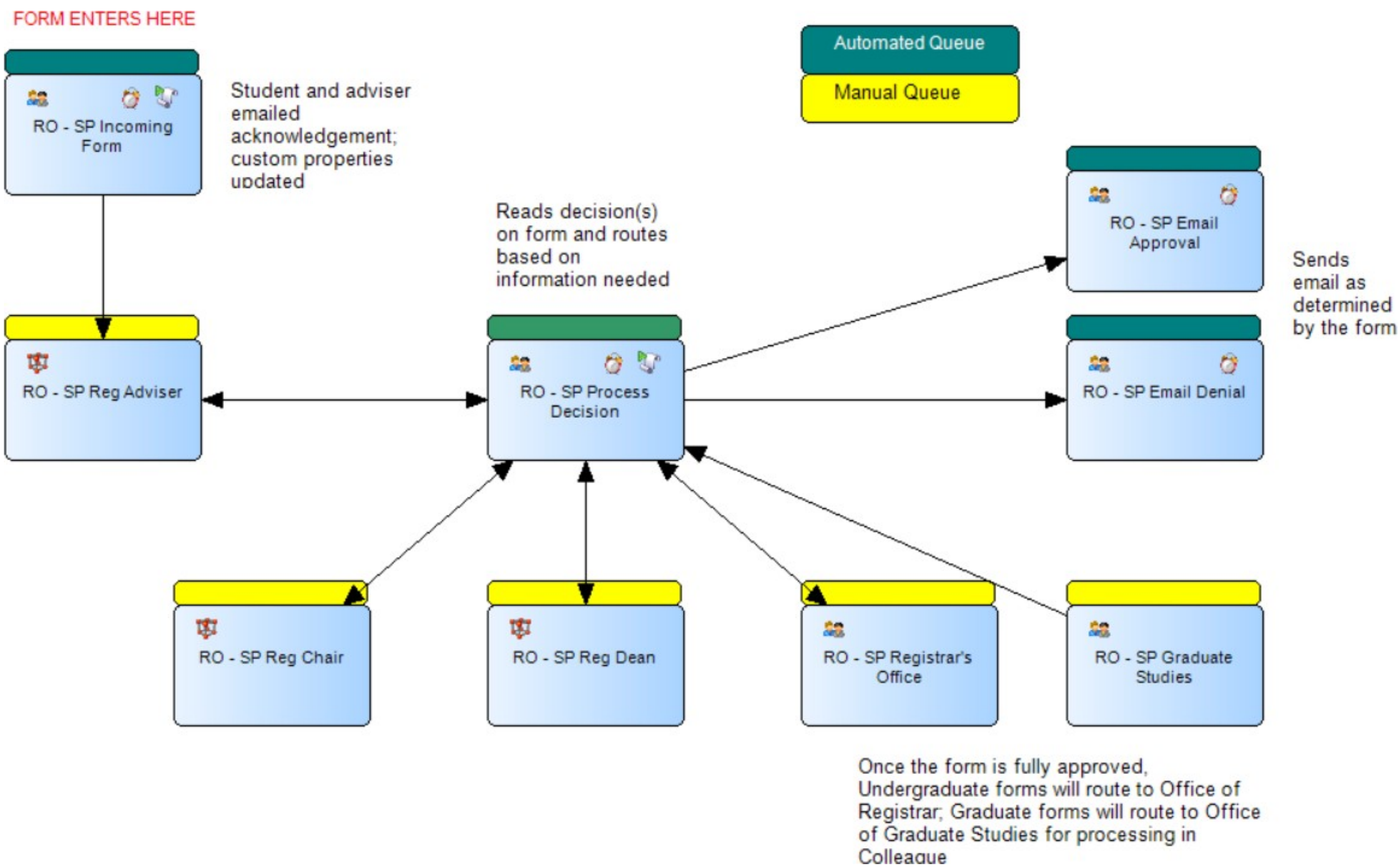
- **Department Chairs** – All **Department Chairs**, including co/associate department chairs, will have the ability to view historical and pending forms in their college. However, **Department Chairs** will not have direct access to the **Director of Advising** workflow queue. No emails will be generated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

- **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 any 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 all 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**.

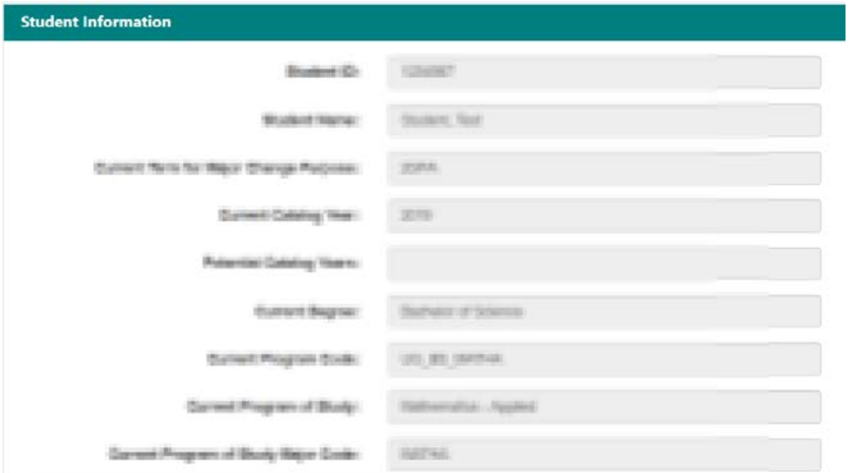
- <u>**Office of Graduate Studies**</u> – **Office of Graduate Studies** have the ability to view historical and pending forms in every college for graduate studies students. **Office of Graduate Studies** will not have direct access all workflow queues. No emails will be generated to the **Office of the Registrar**.

Workflow Diagram

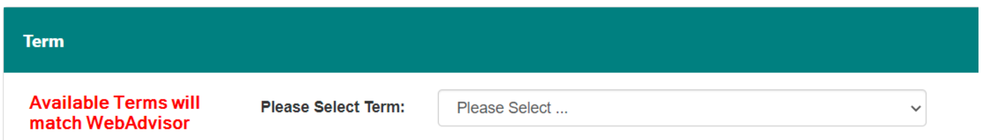


Understanding the Form

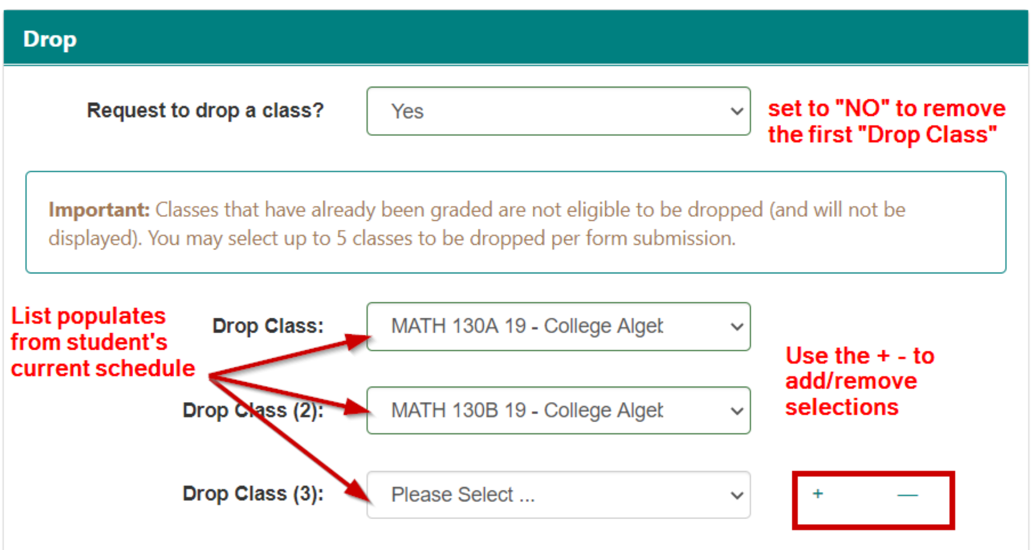
When viewing submitted forms, you will first see **Student Information** that will include student program data at the time the student completed the form.



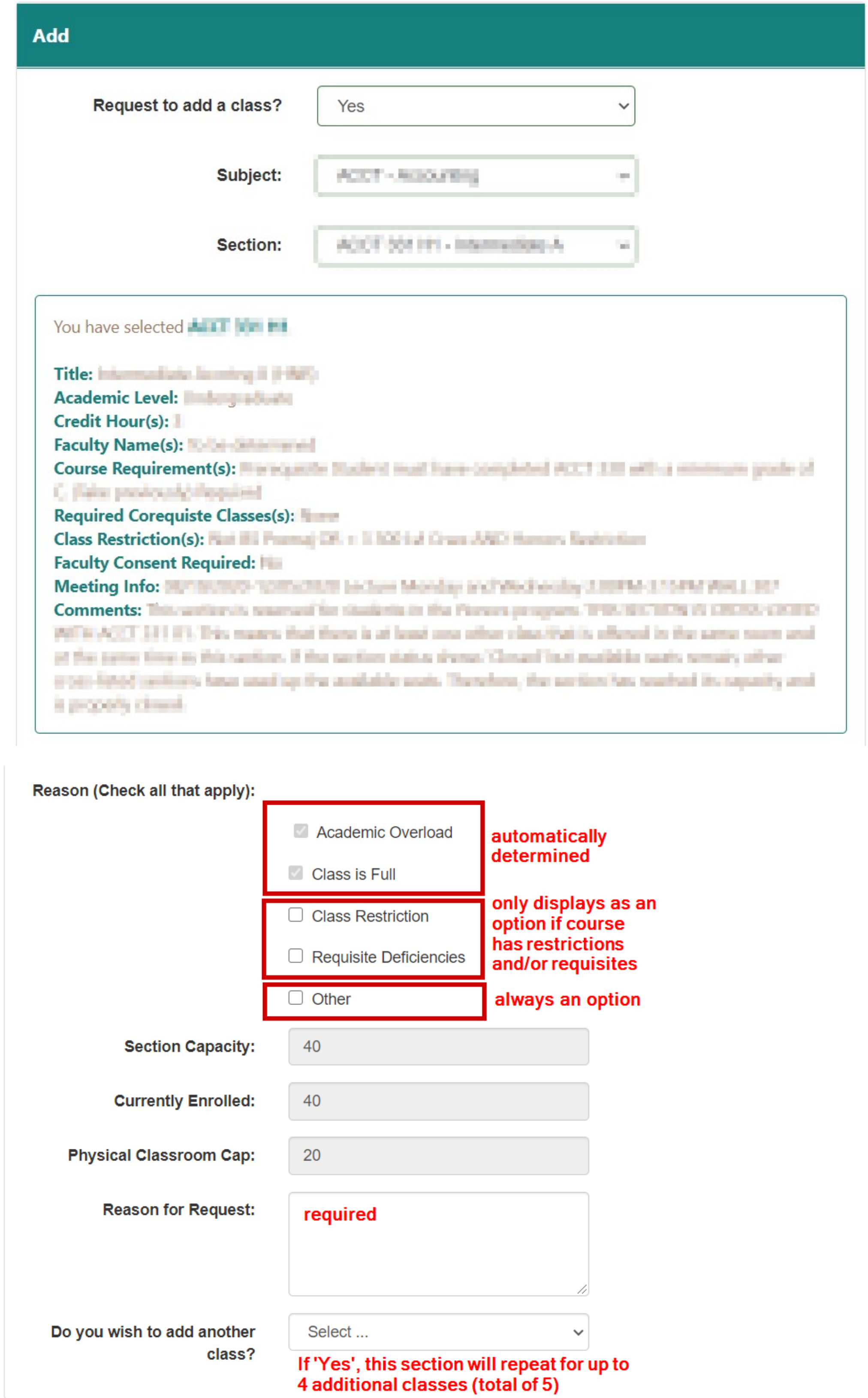
Next, you will see the **Term** section.



Next, you will see the **Drop** section. If you are submitting a form on behalf of the student, you can add/remove sections as in the diagram below:



The next section of the form is the **Add** section. Section options are displayed based on having an active status as of 5am on the current day. Once a section is selected, the faculty name and meeting info is pulled from Colleague in near real-time (<5 cache).



Add

Request to add a class? Yes

Subject:

Section:

You have selected

Title:
Academic Level:
Credit Hour(s):
Faculty Name(s):
Course Requirement(s):
Required Corequiste Classes(s):
Class Restriction(s):
Faculty Consent Required:
Meeting Info:
Comments:

Reason (Check all that apply):

- Academic Overload
- Class is Full

automatically determined

- Class Restriction
- Requisite Deficiencies

only displays as an option if course has restrictions and/or requisites

- Other

always an option

Section Capacity: 40

Currently Enrolled: 40

Physical Classroom Cap: 20

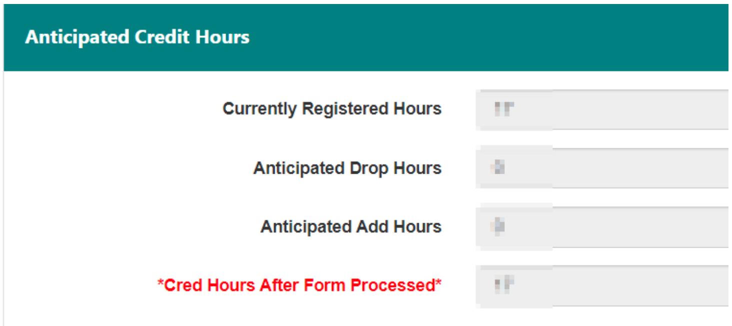
Reason for Request: required

Do you wish to add another class? Select ...

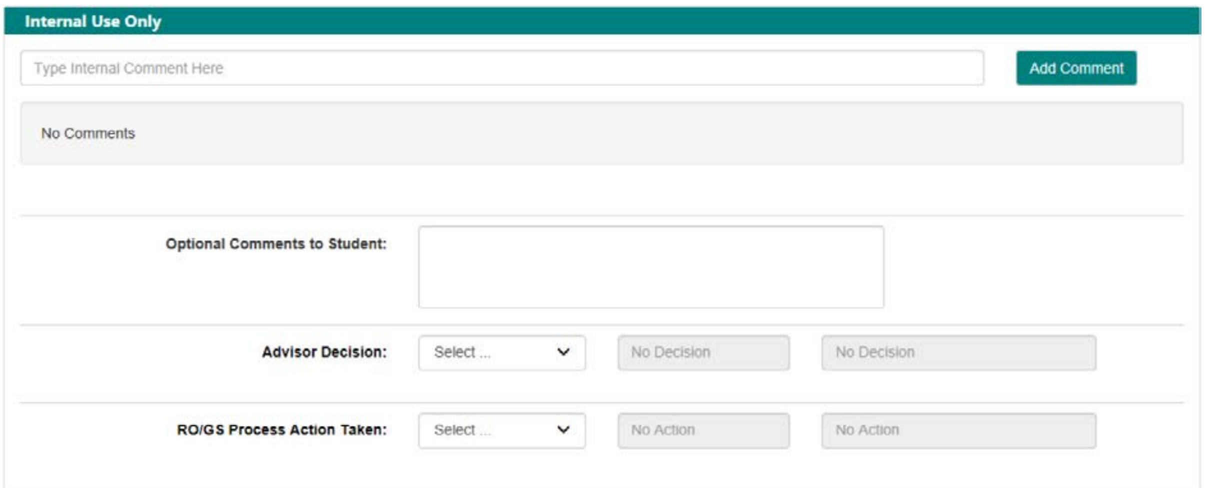
If 'Yes', this section will repeat for up to 4 additional classes (total of 5)

If the registration puts the student in overload, the Academic Overload section will display.

The next section of the will be the Anticipated Credit Hours. These values are automatically calculated as classes are added and/or dropped on the form (assuming all will be approved).



The final section of the form includes an **Internal Use Only** section.

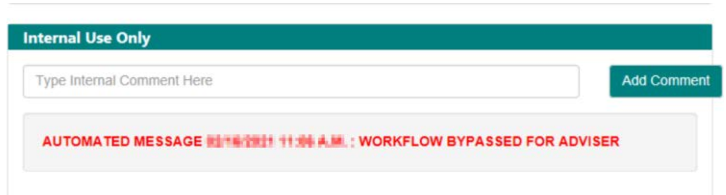


Please note the following:

- **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

Making a Decision for Academic Advisors

If an Academic Advisor submits the form on behalf of *their* advisee, there will be no need for the advisor to approve:



Otherwise, complete the following steps:

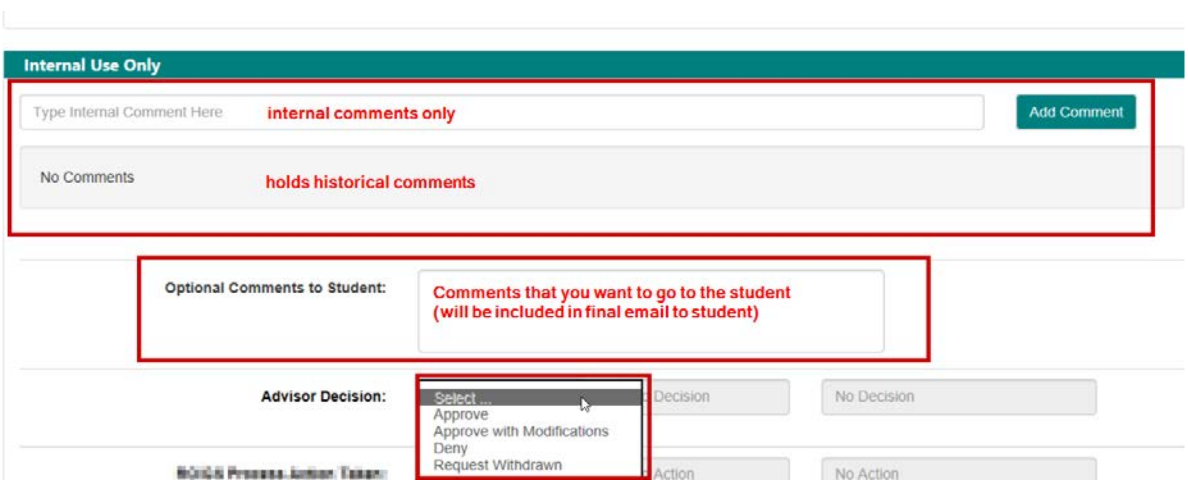
1. Open the form in Perceptive Content using the [Workflow App].

2. Review the form and make a decision:

Important: Consider if the registration should be "related" to each other. Forms can be processed in one of two ways:

- **Default Registration Policy**: All listed registrations will be processed as they can (if approved). If a portion of the form is denied, only that part of the form is ignored. Other approved portions will be processed.
  - Example: Student would like to add an ENGL class and an BIOL class. Student gets approval for ENGL class, but not for BIOL class. The default action will be to register the student in the ENGL class, even though the BIOL class was not approved (students will always receive an email with outcome of action taken)

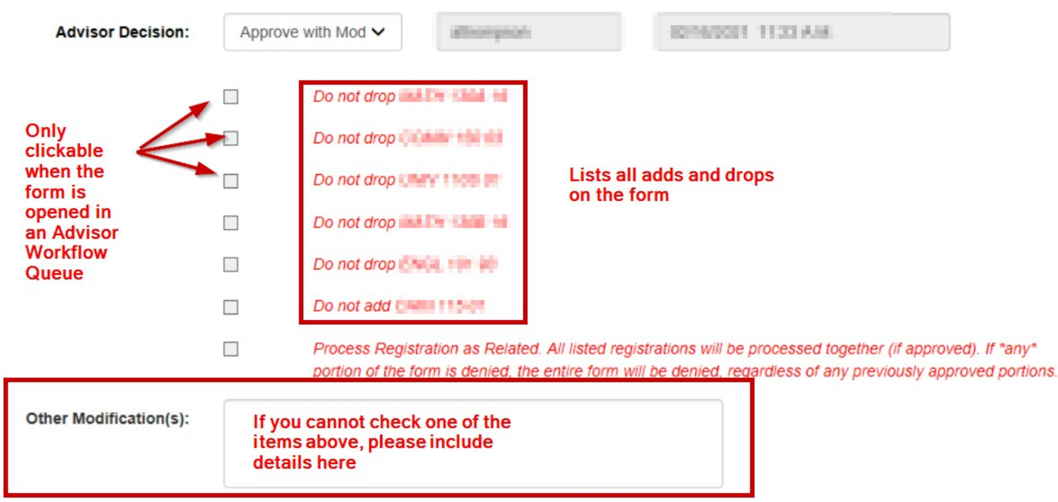
- **Related Registration Policy**: All listed registrations will be processed together (if approved). If *any* portion of the form is denied, the entire form will be denied, regardless of any previously approved portions.
  - **Example**: Student would like to drop an ENGL class only if the student can register in a BIOL class. ENGL class was approved but the BIOL was not approved. Thus, the student will not be registered for any class.
  - In order to request this policy, you must choose **Approve with Modifications** as the **Advisor Decision**



Choose the appropriate decisions:

- **<u>Approve</u>** – This option means that you approve all actions on the form; happy path
    - o The default registration policy will apply

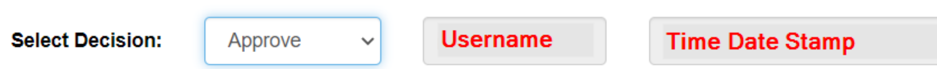
- **<u>Approve with Modifications</u>** – This option means that you would like to make **modifications** to the form.
    - o This option can only be selected when the form is in an ADVISOR workflow queue
    - o You will need to identify how the form should be processed differently than what was submitted



- **<u>Deny</u>** – This option will remove the form from workflow, email the student & active advisers
    - o No action will be taken in Colleague

- **<u>Request Withdrawn</u>** – This option will remove the form from workflow, email the student & active advisers
    - o No action will be taken in Colleague

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

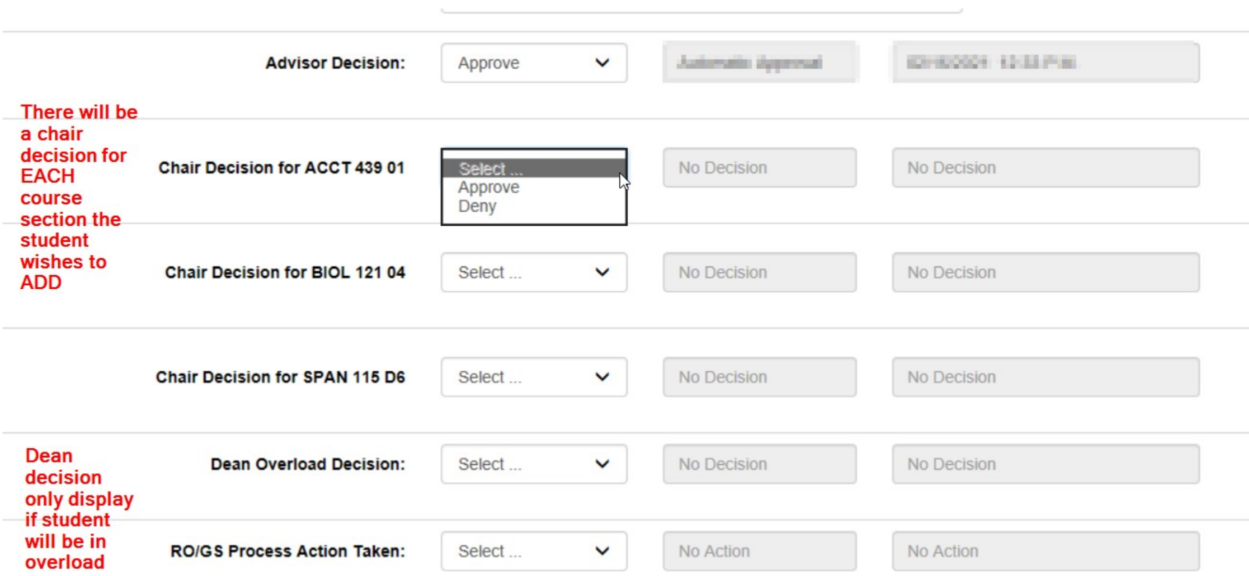


3. Next, you need to [route the document forward](#).

Making a Decision for Department Chairs/Deans

1. Open the form in Perceptive Content using the Workflow App.

2. Review the form and make a decision:

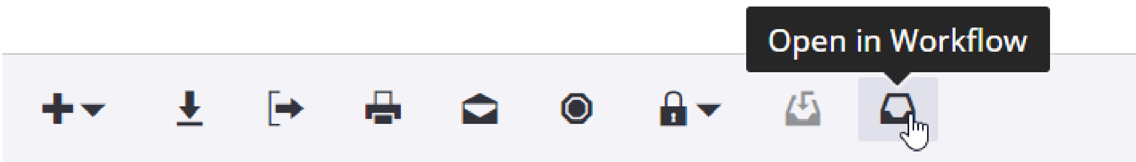


3. Next, you need to route the document forward.

Routing a Document Forward

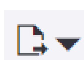
No matter the decision that you make, you will need to always Route Forward. This is because predetermined routing paths have already been confirmed. Even if the decision on the form is to withdraw the request, you will always choose **Route Forward** so that the document can go on its predetermined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

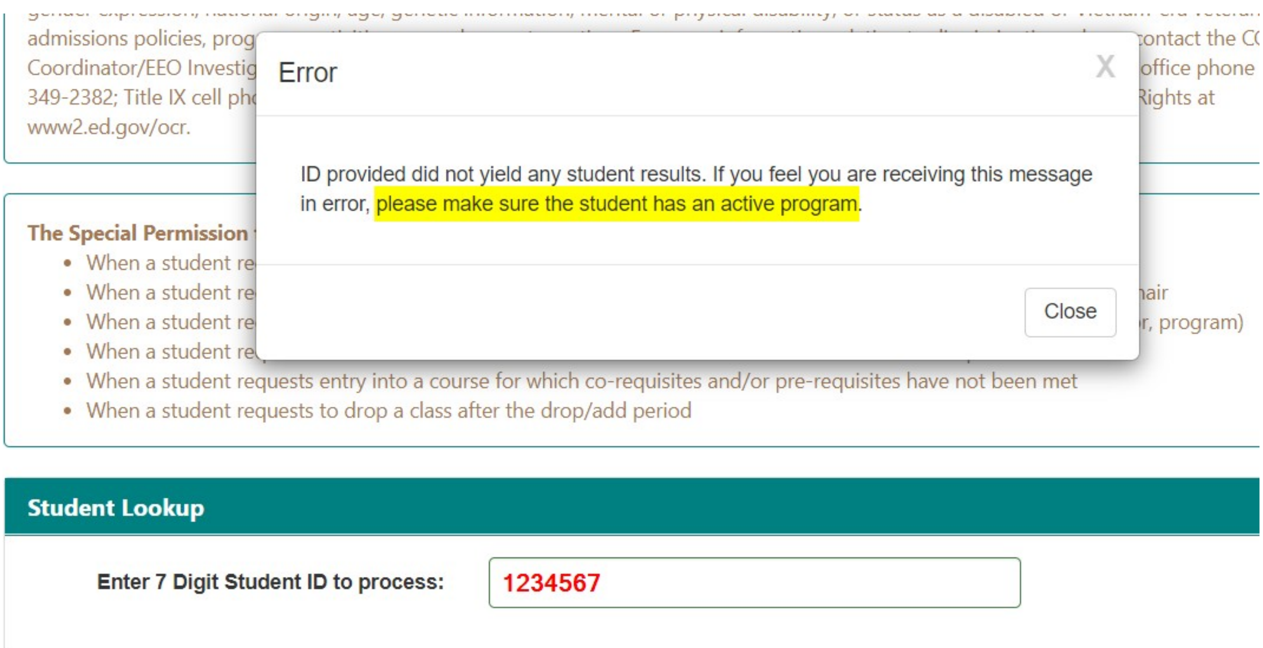
1. Using the **Workflow App**, open the application.

2. Click the  **Route Forward** icon from the toolbar

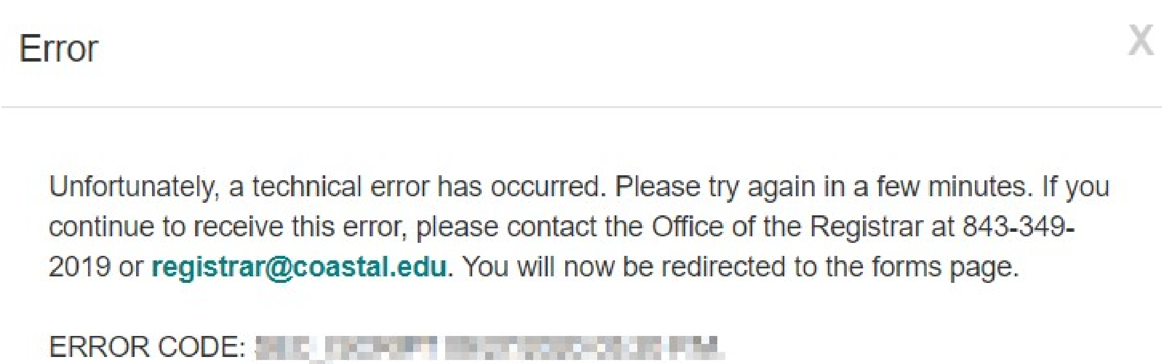
That's it! The next workflow queue will read your decision and process accordingly.

Potential Error Messages

There are several “moving” parts to this form. Most of these messages will be straightforward. For example, an ID entered in the Student Lookup that doesn’t belong to a current student will generate the following error message:



Sometimes, though, error messages are generated because of timing issues with database updates and/or response times to Colleague/Perceptive. These are considered technical errors. The error code and timing will be displayed.



Current list of Error Codes:

- REGSP01
- SUB_ISCRIPT
- SEC_ISCRIPT
- 1FACSTAFFRESULT

Additional Support

If you need additional support, please contact:

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