

Advisor/Approver - Electronic Drop (eDrop)

Overview

This process will allow a student to electronically drop a class. Rather than having a student walk a paper form around campus to obtain authorization signatures, the eDrop document is routed electronically to the same people who previously signed the forms. The electronic routing is called a path.

- Effective in June, 2007, eDrop was available through Onestart beginning in the second week of classes through Auto W deadline to replace paper form processing.
- The date used to update SIS is the date the student *submitted* the request, irrespective of how long it takes to be approved.
- “Nodes” of approval are set at each campus, according to their academic policies.
 1. Student academic advisor/advisor workgroup (based on student career, program, plan, and potential school/department usage of the SIS Advisor table)
 - Workgroups may include multiple individuals and when one takes action, the item is removed from the action list of all individuals within the workgroup.
 2. If International student, routes to International Affairs workgroup
 - Specs: VISM Student Group code and transaction will drop student below fulltime
 3. If Student-Athlete, routes to Student-Athlete advisor workgroup
 - Specs: USSC Student Group (Bloomington and IUPUI) or RS24, RS25, RS27, RS28, RS29, RS30, and RS31 Student Groups
 4. Course Authority – Department offering the course (Bloomington and IUPUI only)
 5. Academic Authority – Dean of student’s school and Dual Program Authority – Dean of student’s school if in a dual problem (Bloomington only).
 6. If a Special Session code (Non, NS1, NS2), it will route to Registrar workgroup for action. This allows the Registrar staff to assign appropriate grades and refund amounts, based on the actual dates of the class. If the student is dropping his last class/es (resulting in a term withdrawal) and requires an override to the refunds, assign the drop reasons as usual within eDrop, then contact your campus Bursar to ensure that the term withdrawal reason is adjusted to reflect the appropriate refund. The Registrar may also approve other drops based on each campus’ setup.
 7. Once all approvals are secured, the student’s SIS enrollment will be automatically updated.
- If student is dropping his/her last class, it will also update student *Term History* pages with student withdrawal if this action is approved by the campus. (See note in #6 above regarding refunds for a term withdrawal.)
- Once approved and SIS enrollment table updated:
 - Email confirmation sent to University email address of student
 - Registrar Office receives daily audit of activity along with error report of any problems to be addressed
 - Faculty rosters in OneStart/Oncourse updated with drop activity and “W” grade
 - Other notifications possible (for example, SF, FA, and Veteran’s Affairs)

Steps

Advisor/Approver Action

1. Log into OneStart.

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The screenshot shows the OneStart web application interface. At the top, there is a navigation bar with tabs for 'Campus', 'Services', 'Notifications (0)', 'My Groups', and 'My Zone'. In the top right corner, there is a link for 'action list | search | logout'. A yellow callout box points to this link with the text 'Click here to access your action list.' Below the navigation bar, the breadcrumb trail reads 'Services > Administrative Systems > SIS'. The main content area is divided into several sections: 'OneStart Helpers' with a 'Tutorial' section and a 'Where's my Stuff?' section; 'Student Records' with a 'Registrar Information' section; and 'SIS Alerts' with a section for staff hours. The 'SIS Alerts' section states that while staff hours have not changed, students and faculty have new hours for access to SIS through OneStart Self-Service.

- In the upper right corner of the page, click on **action list** or click on the *Notifications* tab, then click "**Go to Full Action List.**"

The screenshot shows the 'Action List' page in the workflow application. The page title is 'Action List' and it indicates '9 items found, displaying all items.1'. The table below contains the following data:

Document Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Workgroup Request	Route Log
1068115	SIS SR Drop Course Document	Drop Class#1463, BUS-P 301, IUEAA, UGRD, Bus & Econ Undergraduate, Business Administration BS	ENROUTE	APPROVE	Doe, John		09:56 AM 05/03/2007	SIS.EA.REGR	
1068736	SIS SR Drop Course Document	Drop Class#12532, MUS-M 402, IUBLA, UGRD, Health, PE & Rec Undergraduate, Exercise Science BSK	EXCEPTION	COMPLETE	Student, Ima		03:48 PM 05/10/2007	SIS.SR.E.SU.Apprv	
1068863	SIS SR Drop Course Document	Drop Class#14585, HPER-H 440, IUBLA, UGRD, Health, PE & Rec Undergraduate, Exercise Science BSK	EXCEPTION	COMPLETE	Student, Ima		06:23 PM 05/15/2007	SIS.SR.E.SU.Apprv	
1068892	SIS SR Drop Course Document	Drop Class#20135, HIST-H 113, IUINA, UGRD, Science Undergraduate, Computer Science BS	EXCEPTION	COMPLETE	Student, Ima		12:44 PM 05/16/2007	SIS.SR.E.SU.Apprv	
1068893	SIS SR Drop Course Document	Drop Class#20549, MATH 351, IUINA, UGRD, Science Undergraduate, Computer Science BS	EXCEPTION	COMPLETE	Trainer, John		12:56 PM 05/16/2007	SIS.SR.E.SU.Apprv	
1068930	SIS SR Drop Course Document	Drop Class#20571, MATH-M 118, IUINA, UGRD, University Coll Undergraduate, Business BSB	EXCEPTION	COMPLETE	Trainer, John		04:36 PM 05/16/2007	SIS.SR.E.SU.Apprv	
1070422	SIS SR Drop Course Document	Drop Class#5015, ANTH-A 200, IUBLA, UGRD, Health, PE & Rec Undergraduate, Exercise Science BSK	EXCEPTION	COMPLETE	Student, Ima		12:24 PM 06/08/2007	SIS.SR.E.SU.Apprv	
1070548	SIS SR Drop Course Document	Drop Class#17071, LESA-L 105, IUBLA, GRAD, Health, PE & Rec Graduate, Human Dev & Family Stds MSAHS	EXCEPTION	COMPLETE	Tyler, Seth		12:15 PM 06/12/2007	SIS.SR.E.SU.Apprv	
1070580	SIS SR Drop Course Document	Drop Class#19536, EDUC-A 590, IUINA, GRAD, Education Graduate, Counseling/Counselr Ed MSED	EXCEPTION	COMPLETE	Doe, Jane		09:40 AM 06/13/2007	SIS.SR.E.SU.Apprv	

9 items found, displaying all items.1

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- The **Action List** will be displayed. The initial sort is by **Document ID**. You can sort this page by any of the links at the top of the list (**Document ID, Type, Route Status, Initiator**, etc). To sort, double click on the underlined title of the column and the list will sort by that column.


The **Initiator** column displays the student's name.

The **Title** column contains pertinent information specific to the request, which may help in sorting and filtering a list among the workgroup. The title includes the institution, career, program and plan of the student submitting the request. It also includes the course subject and catalog numbers of the course in review.

Note that in this example the **Action List** has been colored coded because the user has set color preferences in *the Action List Preferences* window.

- If you would like to see the individuals in a **Workgroup**, click on the Workgroup link (for example, **SIS.EA.REGR**).

xworkflow Workgroup Search Rule Search	
Document Id:	-1
Workgroup Id:	1051836
Workgroup Name:	SIS.EA.REGR
Workgroup Active Indicator:	Active
Workgroup Members:	Dennis Hicks (dehicks) Angela K Belcher (angabelc) Francine Dee Delaney (fyork)
Workgroup Description:	

- Click on **Route Log** icon  for detail of when the request was submitted. It also provides other information related to the document.

xworkflow Refresh				
Document ID: 1068115				
Document Title	Drop Class#1463, BUS-P 301, IUEAA, UGRD, Bus & Econ Undergraduate, Business Administration BS			
Document Type	SIS SR Drop Course Document Created: 09:56 AM 05/03/2007			
Initiator	Ima B Student Last Modified: 09:58 AM 05/03/2007			
Route Status	ENROUTE Last Approved:			
Route Node(s)	SIS.SR.DropAdd.Registrar Finalized:			
Actions Taken				
Action	Taken By	For Delegator	Time/Date	Annotation
COMPLETED	Daniel M McDevitt		09:56 AM 05/03/2007	
show APPROVED	Thomas Osquood		09:58 AM 05/03/2007	
Pending Action Requests				
Action	Requested Of	Time/Date	Annotation	
show IN ACTION LIST APPROVE	SIS.EA.REGR	09:58 AM 05/03/2007		
Future Action Requests show				

- Click on the **Document ID** to access the request.

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eDrop Request		Document ID: 1077855	Status: ENROUTE
		Initiator: istudent	Created: 2007-08-13 14:24:22.0

Student's Name: Student, Ima
ID: 0000011111
Career: Undergrad
Program: University Div Undergraduate (UDIV1)
Plan: Nursing BSN (NRSRNBSNP)
Learning Management [PS1PRD](#)

Drop Request

DROP CLASS REQUEST:
CSCI-A 110 INTRO TO COMPUTERS & COMPUTING, Units: 3.0, Twelve Week

Component	Class#	Instructor	Day & Time (Location) Meeting Dates
Lecture	6415	Baldwin,Lora Kay	05/14/2007-08/13/2007

If all pending requests are approved, total units for the term will be: 5.0
 Minimum enrollment units for this term: 0.0
 Maximum enrollment units for this term: 18.0

Min/Max Enrollment Information

Enrollment information for this class:

Cur Enrollment	25	Projected Enrollment	24
Max Enrollment	25	Pending Adds	0
Req Room Capacity	20	Pending Drops	1

Projected Enrollment = Cur Enrollment + Pending Adds - Pending Drops

Add Note (viewable by student & approvers):

Study List for East, Summer 2007:

Status	Course	Description	Class#	Instructor	Units	Session
pending drop (this doc)	CSCI-A 110	INTRO TO COMPUTERS & COMPUTING	6415 (Lecture)	Baldwin,Lora Kay	(3)	Twelve Week
enrolled	BIOL-L 107	BIOLOGICAL CONCEPTS	6265 (Laboratory)	Huffman,Errol Augustus	5	10 Week

7. Once the document is retrieved, you need to review it to determine whether approval may be granted. Standards for approval/non-approval are the same as those used with the paper-driven process.

- A link to **Learning Management** is available if you need additional information prior to making a decision. Clicking on this link brings up the Learning Management screen with the EMPLID pre-populated.
- **Drop class request:** Reflects drop requested and is put into context with the student's entire class schedule listed below.
- **Add Note** field may be used by approver. The note will be returned to the student along with a message about whether the request was approved or not approved. Notes should always be used if disapproving or cancelling a request to explain to the student the reason for such action. Note that **Notes** are visible to anyone on the route path, including the student as mentioned above. *Do not enter any information that should not be considered part of the academic record, to be viewed by personnel in the academic departments, schools or the Offices of the Bursars, Financial Assistance and/or the Registrar.*
- **Notes** that have been previously submitted by the student or other reviewers also appear.
- **Study List** is available so the advisor has all relevant course/degree progress information available.
- **Net units** are calculated.

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8. If the document is ready for approval, click **approve**. If not, you may place the document in a "hold" status by clicking **hold**. It may also be disapproved at this level, which will nullify the document and return it to the initiator.
- **approve** = advisor approves action and submits for next level of approval or update to SIS.
 - **disapprove** = advisor disapproves action and notification of that action will be returned to the student via the action list. A note will be important here to advise the student as to rationale and possible alternative actions.
 - **hold** = advisor has reviewed, but is not ready to take action.
 - If the advisor chooses to use the action of **hold**, the following message will be displayed: "You have placed this request on hold. The document has been marked with your username in the action list."
 - If an individual in the workgroup takes this action, others in the workgroup will see the advisor's username next to this **Document ID** when they view their **Action List**. "Holding" a document does not lock others from accessing the document nor does it prevent anyone else from taking action.
9. Once the document is approved, the following will be displayed.

eDrop Request		Document ID:	1077855	Status:	ENROUTE	
		Initiator:	istudent	Created:	2007-08-13 14:24:22.0	
Student's Name: Student, Ima ID: 0000011111 Career: Undergrad Program: University Div Undergraduate (UDIV1) Plan: Nursing BSN (NRSRNBSNP)						
DROP CLASS REQUEST: CSCI-A 110 INTRO TO COMPUTERS & COMPUTING, Units: 3.0, Twelve Week						
Component	Class#	Instructor	Day & Time (Location) Meeting Dates			
Lecture	6415	Baldwin,Lora Kay	05/14/2007-08/13/2007			
If all pending requests are approved, total units for the term will be: 5.0 Minimum enrollment units for this term: 0.0 Maximum enrollment units for this term: 18.0						
The request has been approved.						
Add Note (viewable by student)		This message will be displayed letting you know the request has been approved.				
<input type="text"/>						
<input type="button" value="add note"/>		<input type="button" value="close window"/>				
Study List for East, Summer 2007:						
Status	Course	Description	Class#	Instructor	Units	Session
pending drop (this doc)	CSCI-A 110	INTRO TO COMPUTERS & COMPUTING	6415 (Lecture)	Baldwin,Lora Kay	(3)	Twelve Week
enrolled	BIOL-L 107	BIOLOGICAL CONCEPTS	6265 (Laboratory)	Huffman,Errol Augustus	5	10 Week

10. The final approval based on campus-specific requirements (refer back to page 1) will send the drop request to the SIS enrollment engine or the Registrar's office for processing. Consequently, the course will be dropped with a grade of **W**.

In addition, an email is automatically generated to the student, informing him/her of the successful

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completion of the drop request as well as providing the enrollment request ID.

Note: the Enrollment request ID may be tracked in SIS via the Mange Student Records > Manage Academic Records > Use > Enrollment Request > Find an Existing Value path.

If the drop request is **Disapproved** or **Canceled**:

- The SIS Enrollment Table will **not** be updated.
- Activity will be written to the audit table maintained by the Registrar.
- Notification will be sent to the student via the action list.

Additional Information:

- The operator ID, creation date, and comment text are stored.
- The final approval date is stored even though it is not displayed.
- The IUIE report SR Workflow Aged Items (IE_SIS_SR_WRKFLOW_AGED_ITEMS) reflects items that are still sitting in an action list and it will show the name of the individual who needs to take action. This report can be used to monitor the action lists of staff in the departments.

Other Resources:

Workflow online demonstration/tutorial and other eDocs job aids:

http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/job_aids/sr/eDocs/