

# Approver – eDrop & eAdd as a Pair

## Overview

This process will allow a student to electronically drop and add a class. Rather than having a student walk a paper form around campus to obtain authorization signatures, the eDrop/eAdd document is routed electronically to the same people who previously signed the forms. The electronic routing is called a path. Note: not all instructors, classes, or campuses are participating in eAdd.

- eDrop and eAdd as a pair is available through Onestart beginning in the second week of classes through the last day to withdraw from a course with an automatic grade of W (“Auto W deadline”).
- 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 and will include some or all of the following:
- **For eDrop:**
  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. The Registrar may also approve other drops based on each campus’ setup.
  7. If not a special session, once all approvals are secured, the students’ SIS enrollment will be automatically updated.
- **For eAdd:**
  1. Instructor
  2. Course Authority (used at Bloomington and in special circumstances at Indianapolis)
  3. Student academic advisor/advisor workgroup (based on student career, program, plan)
  4. Workgroups may include multiple individuals and when one takes action, the item is removed from the action list of all individuals within the workgroup.
  5. If Student-Athlete, routes to Student-Athlete advisor workgroup
  6. Specs: USSC Student Group (Bloomington and IUPUI) or RS24, RS25, RS27, RS28, RS29, RS30, and RS31 Student Groups
  7. Academic Authority/Student’s school (Bloomington only)
  8. Dual program authority (Bloomington only)
  9. If a Special Session code (Non, NS1, NS2), it will route to Registrar workgroup for action. This will allow Registrar staff to review class begin/end dates and to waive late fees, if appropriate. The Registrar may also approve other adds based on each campus’ setup.
  10. If not a special session, once all approvals are secured, SIS enrollment table will be

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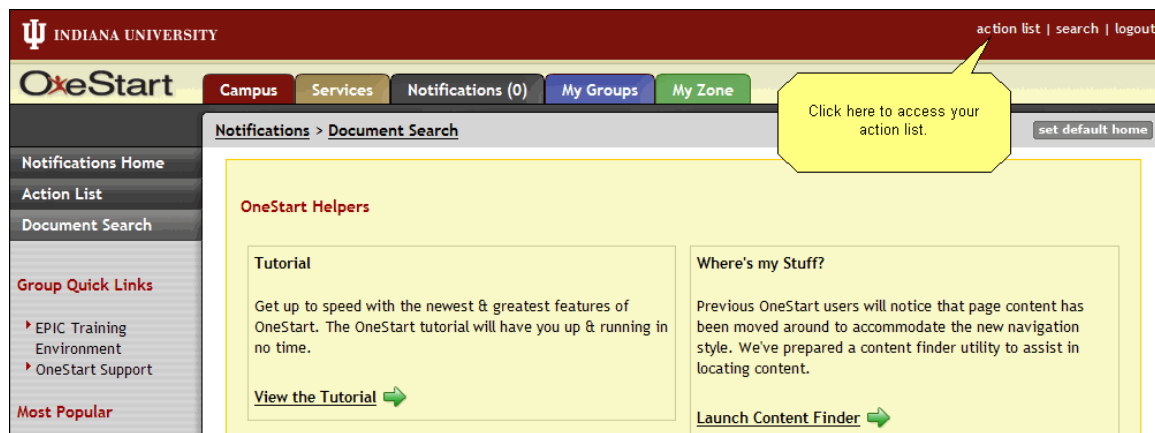
automatically updated.

- Since these document were submitted together (as a pair), neither document will be processed until both have been approved by all required nodes.
- Once both documents have been 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 newly added students
  - Other notifications possible (for example, SF, FA, and Veteran's Affairs)
- Since the class instructor has first authority for allowing a student to add their class, it is critical that faculty be aware of and responsive to their workflow Action List. Faculty unwilling to use their Action List should provide approval in some fashion agree upon by their course department (i.e. signing the student's eAdd receipt, signing a paper drop/add from, etc.)

## Steps

### Approver Action

1. Log into OneStart.



2. 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.**"

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**xworkflow** Preferences Refresh Action List Filter

**Action List**  
9 items found, displaying all items.1

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, IUCAA, 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, lma		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, lma		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, lma		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, lma		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

- 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 ( <a href="#">dehicks</a> ) Angela K Belcher ( <a href="#">anabelc</a> ) Francine Dee Delaney ( <a href="#">fyork</a> )
Workgroup Description:	

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

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**workflow** 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	
APPROVED	Thomas Osquod		09:58 AM 05/03/2007	

**Pending Action Requests**

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	SIS.EA.REGR	09:58 AM 05/03/2007	

**Future Action Requests** [show](#)

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

<b>eDrop Request</b>	<b>Document ID:</b> 1077855	<b>Status:</b> ENROUTE
	<b>Initiator:</b> istudent	<b>Created:</b> 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 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

**Enrollment information for this class:**

<b>Cur Enrollment</b>	25	<b>Projected Enrollment</b>	24
<b>Max Enrollment</b>	25	<b>Pending Adds</b>	0
<b>Req Room Capacity</b>	20	<b>Pending Drops</b>	1

Projected Enrollment = Cur Enrollment + Pending Adds - Pending Drops

**Add Note (viewable by student & approvers):**

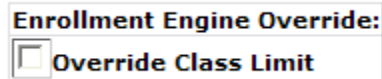
[approve](#) [disapprove](#) [cancel transaction](#) [hold](#) [add note](#)

**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

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NOTE: Depending on the business process for the department offering the course, you may have the responsibility of checking to see if the class is full before giving approval for a student to add. Talk to your department to determine your business process. If you can override the class limit, you will see the following box below the **Enrollment Information for this class**.



- 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.
  - **Enrollment Engine Override:** Whether or not this button appears depends on the business process in the department offering the course and if they want you to monitor the class limit and override it when adding a student to a class that will exceed the class limit.
  - **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 from other reviewers also appear.
  - **Study List** is available so the advisor has all relevant course/degree progress information available.
  - **Net units** are calculated.
7. 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. If you have the option to **Override Class Limits** and don't check this box, a reminder will appear in red at the top of the page: **"If the student should be enrolled regardless of enrollment limit or requisites, click on Class Limit or Requisite override checkbox before clicking 'APPROVE' again."**
    - If you want to add the student to the class, regardless of if the class is full, click **Override Class Limit**, then click **approve**.
    - If the **Class Limits** should be obeyed, click **approve**.
  - **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**

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with your username in the action list.” Note: When putting a document on **hold**, no message is sent to the student; you have simply put the document on hold while you take further action. Communication with the student will need to be conducted by some other means before taking future action on the eDocument.

- o 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.
8. Once the document is approved, the following will be displayed. When a document is approved or disapproved, a note is automatically added to the document showing the ID of the approver.

<b>eDrop Request</b>		<b>Document ID:</b> 1077855	<b>Status:</b> ENROUTE
		<b>Initiator:</b> istudent	<b>Created:</b> 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.

add note    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

9. 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**.

If the drop does not require approval, the document will go into FINAL status, but a note will be added to the record that this document will not be processed until the dependent document has been approved.

<b>Notes:</b>		
Created By	Date/Time	Note
SISE	10/02/2007 14:12	Processing of this doc will be deferred until dependent doc is final approved. Dependent docId=1080330

In addition, an email is automatically generated to the student, informing him/her of the successful completion of the drop request as well as providing the enrollment request ID.

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Note: The **Enrollment Request ID** may be tracked in SIS via this path: Records and Enrollment > Enroll Students > Enrollment Request > Find an Existing Value.

- Click on the **Document ID** to access the request. Note: If the approver is the instructor, the total units and study list will not be visible due to FERPA regulations.

eAdd Request		Document ID:	1153056	Status:	ENROUTE
		Initiator:	istudent	Created:	2008-10-14 14:38:21.0

Student's Name: Ima Student  
ID: 0000011111  
Term: Fall 2008  
Institution: Bloomington  
Career: Undergrad  
Program: Arts & Sciences Undergraduate (COLL1)  
Plan: Biology BS (BIOLBS)  
Administrative Center

**ADD CLASS REQUEST:**

Component	Class#	Instructor	Day & Time (Location)	Meeting Dates
Discussion	<a href="#">7076</a>		W 1:25 PM-2:15 PM (MART012A)	09/02/2008-12/19/2008
Lecture	<a href="#">7074</a>	Doe, John	MW 10:10 AM-11:00 AM (JORDA100)	09/02/2008-12/19/2008

If all pending requests are approved, total units for the term will be: 18.0  
Minimum enrollment units for this term: 0.0  
Maximum enrollment units for this term: 23.0

Enrollment information for this class:

Cur Enrollment	17	Pending Adds	1
*Projected Enrollment	18	Pending Drops	0
Max Enrollment	20	Dropped with W	0
Req Room Capacity	21		

\*Projected Enrollment = Cur Enrollment + Pending Adds - Pending Drops - Dropped with W's

Note (viewable by student & approvers):

approve disapprove cancel document hold add note

NOTE: Depending on the business process for the department offering the course, you may have the responsibility of checking to see if the class is full before giving approval for a student to add. Talk to your department to determine your business process. If you can override the class limit, you will see the following box below the **Enrollment Information for this class**.

<b>Enrollment Engine Override:</b>
<input type="checkbox"/> <b>Override Class Limit</b>

- 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.

- Add Class Request:** Shows the details for the class the student is attempting to add.
  - Class #:** The class number is a link to the SIS Enrollment Information Browser so you can check the current enrollment in each part of the class before taking action on the request. It is recommended that you check all parts of the class (discussion, lab, lecture, etc.).

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**SIS Enrollment Information Browser**

**Required:**  
 Institution:  Career:  Term:  (eg. 4078)

**Also, enter at least one of the following:**  
 Class#:  Dept:  Prefix:  Catalog#:

Class#	Session	Subject	Cat#	Title	Component	SIS Tot	Proj Tot	Pend Adds	Pend Drops	W Drops	Enrl Cap	Room Cap
7076	1	ANTH-E	105	CULTURE & SOCIETY	DIS	17	18	1	0	0	20	21

**Key:**

<b>SIS Tot:</b>	Number of students enrolled + number of students dropped with W grade (delivered PS calculation)
<b>Proj Tot:</b>	Projected enrollment = SISTot + PendAdds - PendDrops - WDrops
<b>Pend Adds:</b>	Pending adds (eAdd requests that are not yet approved)
<b>Pend Drops:</b>	Pending drops (eDrop requests that are not yet approved)
<b>W Drops:</b>	Number of students who dropped the class and received a W grade. Note: PeopleSoft includes W Drops in SIS Tot, even though these seats are available.
<b>Room Cap:</b>	PS Requested Room Capacity

- **Total Units:** The student's pending units, minimum enrollment units, and maximum enrollment units are listed. (Not visible to instructor due to FERPA regulations.)
  - **Enrollment information for this class:** Class enrollment information is provided to assist the instructor/approver in determining if there is pending activity that could affect the class enrollment limits.
  - **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 also appear.
12. If the document is ready for approval, click . If not, you may place the document in a "hold" status by clicking . It may also be disapproved at this level, which will nullify the document and return it to the initiator.
- **approve** = instructor/reviewer approves action and submits for next level of approval or update to SIS.
  - **disapprove** = instructor/reviewer 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** = instructor/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." Note: When putting a document on **hold**, no message is sent to the student; you have simply put the document on hold while you take further action. Communication with the student will need to be conducted by some other means before taking future action on the eDocument.

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- 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.

13. Once the document is approved, the following will be displayed.

eAdd Request		Document ID:	1077027	Status:	ENROUTE	
		Initiator:	maeharri	Created:	2007-08-10 15:16:29.0	
<b>Student's Name:</b> Student, lma						
<b>ID:</b> 0000011111						
<b>Career:</b> Undergrad						
<b>Program:</b> Nursing-Assoc. Undergraduate (NSAA1)						
<b>Plan:</b> Nursing-Asn (Pre) ASN (NASPASNPR)						
<b>ADD CLASS REQUEST:</b>						
<b>Term:</b> Summer 2007						
<b>Session:</b> Summer Session 2						
<b>Class:</b> PSY-P 216						
<b>Title:</b> LIFE SPAN DEVELOPMENTAL PSYCH						
<b>Units:</b> 0.0						
Component	Class#	Day & Time (Location)	Meeting Dates	Instructor		
Lecture	1103	1:00 PM-4:15 PM MW (KOMN106)	06/25/2007-08/08/2007	Clark, Kevin M.		
<b>If all pending requests are approved, total units for the term will be: 10.0</b>						
Minimum enrollment units for this term: 0.0						
Maximum enrollment units for this term: 18.0						
<b>The request has been approved.</b>						
<b>Add Note (viewable by student)</b>						
<input type="text"/>						
<input type="button" value="add note"/> <input type="button" value="close window"/>						
<div style="border: 1px solid black; background-color: yellow; padding: 5px; display: inline-block;">                     The message will be displayed letting you know the request has been approved.                 </div>						
<b>Notes:</b>						
Created By	Date/Time	Note				
maeharri	08/10/2007 15:16	I need to add a class to my summer schedule.				
<b>Study List for Kokomo, Summer 2007:</b>						
Status	Course	Description	Class#	Instructor	Units	Session
pending add (this doc)	PSY-P 216	LIFE SPAN DEVELOPMENTAL PSYCH	1103 (Lecture)	Clark, Kevin M.	+3	Summer Session 2
enrolled	MICR-J 200	MICROBIOLOGY & IMMUNOLOGY	1080 (Lecture)	Chauret, Christian P.	3	Summer Session 1
enrolled	SPCH-S 121	PUBLIC SPEAKING	1113 (Lecture)	Darr, Christopher R.	3	Summer Session 2
completed	MICR-J 201	MICROBIOLOGY LABORATORY	1081 (Laboratory)	Chauret, Christian P.	1	Summer Session 1

14. When you are finished reviewing/approving the request, click

15. The final approval based on campus-specific requirements (refer back to page 1) will send the add request to the SIS enrollment engine for processing. Consequently, the course will be added to the student's schedule. If there is an error in processing, the document will either be returned to the student (in the case of a time conflict, for example) or go to the Registrar's office for resolution.

In addition, an email is automatically generated to the student, informing him/her of the successful completion of the add request as well as providing the enrollment request ID.

If the add 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's University e-mail address.

# *Approver – eDrop & eAdd as a Pair*

## **Additional Information:**

- The operator ID, creation date, and comment text are stored.
- The final approval date is stored even though it is not displayed.

## **Other Resources:**

Workflow online demonstration/tutorial for Admin Users:

[http://ses.indiana.edu/campusServices/sisTraining/SIS9.0\\_onlineHelp/job\\_aids/sr/eDocs/](http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/job_aids/sr/eDocs/)