

# Instructor/Approver - Electronic Add (eAdd)

## Overview

This process will allow a student to electronically add a class. Rather than having a student walk a paper form around campus to obtain authorization signatures, the 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.

- eAdd will be available through OneStart beginning the second week of classes, for each campus (through the campus eAdd 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:
  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)
    - Workgroups may include multiple individuals and when one takes action, the item is removed from the action list of all individuals within the workgroup.
  4. 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
  5. Academic Authority/Student’s school (Bloomington only)
  6. Dual program authority (Bloomington only)
  7. 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.
- 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 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 agreed upon by their course department (i.e. signing a paper drop/add form instead or directing student to course department for administrative eAdd initiation.)

## Steps

### Instructor/Approver Action

1. If a student has initiated an electronic request to add a class, the following message will be received in the faculty email inbox:

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Your OneStart Action List has 1 eDoc (electronic documents) that need your attention:

1 SIS.SR.AddCourse

To respond to each of these eDocs:

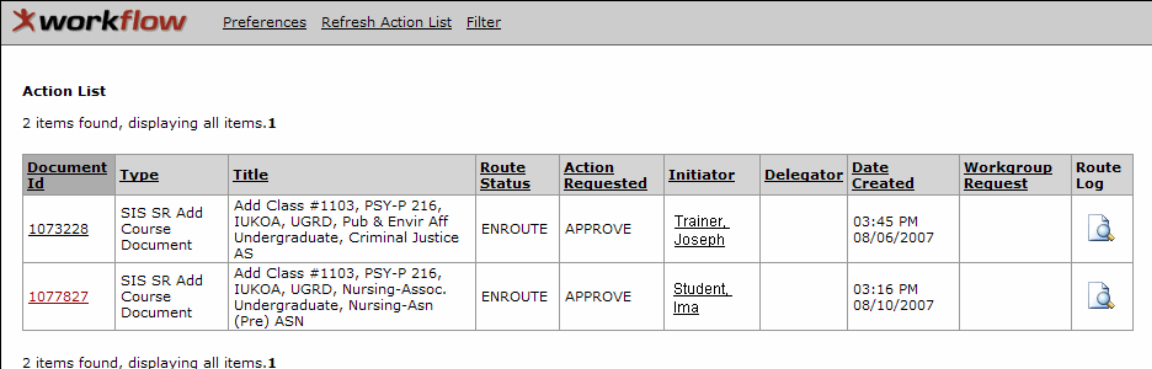
Go to <https://uisapp2.iu.edu/en-prd/ActionList.do>, and then click on its numeric Document ID in the first column of the List.

To change how these email notifications are sent (immediately, weekly or none):



Go to <https://uisapp2.iu.edu/en-prd/Preferences.do>

For additional help, email [<mailto:workflow@indiana.edu>](mailto:workflow@indiana.edu)

2. Click on the link within the email message or click on the *Notifications* tab in OneStart, then click **“Go to Full Action List.”**
3. If you’re not already logged in, you will need to authenticate with your username and passphrase.
4. Once authenticated, the **Action List** will display.



The screenshot shows the Xworkflow interface with a navigation bar containing 'Xworkflow', 'Preferences', 'Refresh Action List', and 'Filter'. Below the navigation bar, the 'Action List' section displays '2 items found, displaying all items.1'. A table with 10 columns is shown: Document Id, Type, Title, Route Status, Action Requested, Initiator, Delegator, Date Created, Workgroup Request, and Route Log. Two rows of data are visible, each with a document ID link and a document icon in the Route Log column.

Document Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Workgroup Request	Route Log
<a href="#">1073228</a>	SIS SR Add Course Document	Add Class #1103, PSY-P 216, IUKOA, UGRD, Pub & Envir Aff Undergraduate, Criminal Justice AS	ENROUTE	APPROVE	<a href="#">Trainer Joseph</a>		03:45 PM 08/06/2007		
<a href="#">1077827</a>	SIS SR Add Course Document	Add Class #1103, PSY-P 216, IUKOA, UGRD, Nursing-Assoc. Undergraduate, Nursing-Asn (Pre) ASN	ENROUTE	APPROVE	<a href="#">Student Ima</a>		03:16 PM 08/10/2007		

2 items found, displaying all items.1

5. 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.

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

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<b>eAdd Request</b>		<b>Document ID:</b> 1153056	<b>Status:</b> ENROUTE
		<b>Initiator:</b> istudent	<b>Created:</b> 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)

eAdd request

**Administrative Center**

**ADD CLASS REQUEST:**

**ANTH-E 105 CULTURE & SOCIETY, Units: 3.0, Regular Academic Session**

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:**

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

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

Note (viewable by student & approvers):

Add note if needed

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. *Some or all of the following information may be presented, depending on your role.*
  - 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 on instructor view.)
  - **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.
  - **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.
  - **Class schedule (Study List):** The student's current class schedule. (Not on instructor view.)
  - **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.
8. 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. 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."

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- If you want to add the student to the class, regardless of if the class is full, click **Override Class Limit**, then **approve**.
  - If the **Class Limits** should be obeyed, click **approve**.
  - **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.
    - 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. A note will automatically be added to the document showing the ID of the approver.

<b>eAdd Request</b>		<b>Document ID:</b> 1084427	<b>Status:</b> ENROUTE
		<b>Initiator:</b> istudent	<b>Created:</b> 2007-12-06 15:15:21.0

**Student's Name:** Student,Ima  
**ID:** 0000011111  
**Term:** Fall 2007  
**Institution:** Bloomington  
**Career:** Undergrad  
**Program:** University Div Pre-SPEA (UDSP1)  
**Plan:** Management BSPA (MGMTSBSPPAP)  
**Learning Management**

**ADD CLASS REQUEST:**

**HPER-E 132 BEGINNING IRISH DANCE, Units: 1.0, Regular Academic Session**

Component	Class#	Instructor	Day & Time (Location) Meeting Dates
Activity	17524	Instructor, Joe	12:20 PM-1:10 PM MW (HPER173A) 08/27/2007-12/14/2007

**Enrollment information for this class:**

<b>Cur Enrollment</b>	16	<b>Pending Adds</b>	2
<b>*Projected Enrollment</b>	18	<b>Pending Drops</b>	0
<b>Max Enrollment</b>	20	<b>Dropped with W</b>	0
<b>Req Room Capacity</b>	20		

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

**The request has been approved.**

**Add Note (viewable by student)**

**add note** **close window**

This message will be displayed letting you know the request has been approved.

10. When you are finished reviewing/approving the request, click **close window**.

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11. 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**:

- 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.

eAdd Request		Document ID:	1077827	Status:	FINAL
		Initiator:	istudent	Created:	2007-08-10 15:16:29.0
<b>Student's Name:</b>	Student, Ima				
<b>ID:</b>	0000011111				
<b>Career:</b>	Undergrad				
<b>Program:</b>	Nursing-Assoc. Undergraduate (NSAA1)				
<b>Plan:</b>	Nursing-Asn (Pre) ASN (NASPASNPR)				
<b>Approval Date:</b>	2007-08-10 15:42:51.58				
<b>Learning Management</b>					
<b>ADD CLASS REQUEST:</b>					
PSY-P 216 LIFE SPAN DEVELOPMENTAL PSYCH, Units: 3.0, Summer Session 2					
Component	Class#	Instructor	Day & Time (Location) Meeting Dates		
Lecture	1103	Clark, Kevin M.	1:00 PM-4:15 PM MW (KOMN106) 06/25/2007-08/08/2007		
<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>Enrollment information for this class:</b>					
<b>Cur Enrollment</b>	10	<b>Projected Enrollment</b>	11		
<b>Max Enrollment</b>	45	<b>Pending Adds</b>	1		
<b>Req Room Capacity</b>	45	<b>Pending Drops</b>	0		
Projected Enrollment = Cur Enrollment + Pending Adds - Pending Drops					
<b>This request has been processed.</b>					
Enrl Request Id: 0004495296					
Status: M					
Message(s):					
<ul style="list-style-type: none"> <li>▪ Course previously taken and may be subject to institutional repeat policy. (14640,147)</li> </ul>					
<b>Add Note (viewable by student &amp; approvers):</b>					
<input type="text"/>					
<input type="button" value="add note"/>		<input type="button" value="close window"/>			

This message will appear when the eDoc has been completely processed and is "final".

## Additional Information:

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

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- 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.
- Another path to accessing the **Action List** is through OneStart. Once you are logged into OneStart, click on **action list** in the upper right corner of the page. You will also notice the number of items in your **action list** will be displayed on the *Notifications* tab.
- You can click on Route Log icon for detail of when the request was submitted. It also provides other information related to the document.

Document ID: 1077827

Document Title	Add Class #1103, PSY-P 216, IUOKA, UGRD, Nursing-Assoc. Undergraduate, Nursing-Asn (Pre) ASN		
Document Type	<a href="#">SIS SR Add Course Document</a>	Created	03:16 PM 08/10/2007
Initiator	<a href="#">Ima B Student</a>	Last Modified	03:16 PM 08/10/2007
Route Status	<b>ENROUTE</b>	Last Approved	
Route Node(s)	SIS.AutoInstructorRole	Finalized	

**Actions Taken**

Action	Taken By	For Delegator	Time/Date	Annotation
COMPLETED	<a href="#">Ima B Student</a>		03:16 PM 08/10/2007	

**Pending Action Requests**

Action	Requested Of	Time/Date	Annotation
<a href="#">show</a> IN ACTION LIST APPROVE	<a href="#">Thomas Teacher (INSTRUCTOR)</a>	03:16 PM 08/10/2007	

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

## 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/)