

# Workflow Exception Routing for eDocs

Documents that have been approved by all necessary nodes in workflow and are sent to the enrollment engine, but fail for some reason are sent to “exception routing.”

There is one workgroup for all IU campuses and all documents will appear in all users’ action lists.

- NOTE: If you have your Action List preferences set to “Email notification=Immediate” you will receive an email every time an item appears in your action list. This includes documents that are in exception routing and may not apply to your campus.

**Only the campus responsible for the document needs to take action.** The item(s) will be removed from the other users’ action lists when they are resolved by the appropriate campus.

If you don’t want to receive emails for every item that goes into your action list, you can click on **Action List**, then **Preferences**, then go to **Email Notification** and change that setting to **None**, **Daily**, or **Weekly**. This is not recommended because it would require you to remember to check your **Action List** regularly since you won’t be receiving email reminders as often.

**Workarea**

**workflow** [Return to Action List](#)

**Action List Preferences**

Automatic Refresh Rate:(in whole minutes - 0 is no automatic refresh.)	15
Action List Page Size	10
Email Notification	Immediate ?
Send Email Notifications for Documents where I am a Primary Delegate	None
Send Email Notifications for Documents where I am a Secondary Delegate	Daily
Delegator Filter	Weekly
	Immediate
	Secondary Delegates only

A user can tell if a document in his/her inbox is in exception routing because the **Route Status = EXCEPTION** and the **Workgroup Request = BL-UIITS-SIS-SR-E-APPROVER-1**.

**workflow** [Preferences](#) [Refresh Action List](#) [Filter](#)

**Action List**

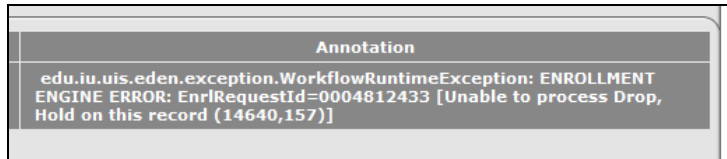
3 items found, displaying all items.1

Document Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Workgroup Request	Route Log
2098039	SIS SR Drop Course Document	Drop Class#6762, BUS-A 202, IUINA, UGRD, University Coll Undergraduate, Management BSB	EXCEPTION	COMPLETE	Safdar, Asviah M		12:22 PM 06/29/2007	BL-UIITS-SIS-SR-E-APPROVER-1	
2100438	SIS SR Drop Course Document	Drop Class#7297, ENG-W 131, IUINA, UGRD, University Coll Undergraduate, Exploratory Baccalaureate	EXCEPTION	COMPLETE	Bannon, Michael		12:49 PM 07/01/2007	BL-UIITS-SIS-SR-E-APPROVER-1	
2101345	SIS SR Drop Course Document	Drop Class#8818, CSCI-N 207, IUINA, UGRD, Science Undergraduate, Psychology BS	EXCEPTION	COMPLETE	Tolbert, Adrienne		09:57 AM 07/02/2007	BL-UIITS-SIS-SR-E-APPROVER-1	

3 items found, displaying all items.1

When you see a document with the **Route Status = EXCEPTION**, you can click on the **Route Log** and check the “**Annotation**” field to see why the document failed in the enrollment engine.

# Workflow Exception Routing for eDocs



Some reasons a document might go to exception routing are listed below.

## eDrop

- Student attempts to drop below minimum credit hour threshold. Minimum hours are maintained on the *Term Activation* page in SIS.
  - **Resolution:** *Either adjust the student's minimum hours on the enrollment limits page in SIS and then approve the document, sending it back to the enrollment engine for processing, or add a note that the student attempted to go below minimum hours and cancel the document.*
- Student tries to drop the class via paper form AND an eDrop request. The error in workflow would say: "Cannot Drop, Grade Present" or "Class already dropped".
  - **Resolution:** *Add a note that the class was dropped in person and then cancel the document.*

## eAdd

- Student attempts to add a class that would take him over his maximum hours limit for the term or session.
  - **Resolution:** *Either adjust the student's maximum hours on the enrollment limit page in SIS and then approve the document, sending it back to the enrollment engine for processing, or override the student's maximum hours and approve the document.*
- Student attempts to add a class that has another required portion that was not added (this is known as a class link in SIS).
  - **Resolution:** *As a super user or member of the Registrar workgroup, you can click the "class links" override button and approve the request.*
- The campus has the **CONFIG** setting **OVERRIDE\_REQUISITES=N** and the student tries to add a class for which he/she has not completed the requisites.
  - **Resolution:** *Contact the appropriate department on campus to find out if the student should have an override for this add.*
    - *If so, add a class permission in SIS and approve the eDoc, sending it back to the enrollment engine for processing.*
    - *If the student should not be allowed to take this class, add a note of explanation and cancel the document.*

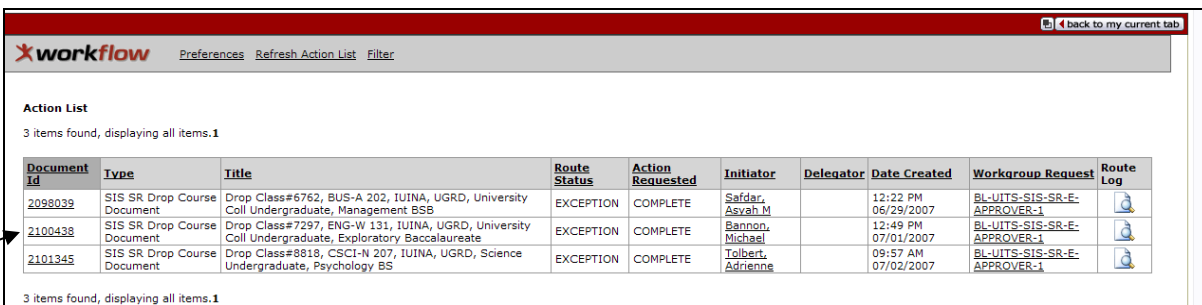
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## eDrop/eAdd Pair

Since eDrop/eAdd pairs are tied together, they must both be approved in order to be processed successfully. Sometimes a problem occurs when one document is approved and the other is not. Below is a scenario that could occur.

1. Student initiates an eDrop and eAdd pair.
2. The eAdd is approved first and in **FINAL** status waiting for the eDrop to be approved.
3. The eDrop is approved, so the enrollment engine kicks off.
4. The enrollment engine fails on the eAdd because the class was closed, wrong career, requisites not met, etc.
5. Because the status has gone to **FINAL**, the eAdd document status cannot be changed. However, since the eDrop document has not gone to **FINAL** status yet, it can be tagged as **EXCEPTION** by the workflow system.
6. Consequently, the eDrop is the document sent to **EXCEPTION** status, but the eAdd was really where the problem occurred. The superuser must look carefully at the document pair to determine that the problem was with the add, although the error message is on the drop.

Click on the **Document Id** to see your action options.



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approve

disapprove

complete

cancel document

hold

add note

blanket approve

superuser functions

**Approve** = Approves the document for all nodes, acts the same as “blanket approve.”

**Disapprove** = Disapproves the document as if you were in the route path at this node.

**Complete** = This button should not be used. Instead, you should resolve the issue in SIS and cancel the document or if it cannot be resolved, cancel the document and leave a note for the student.

**Cancel document** = Cancels the document as if you were in the route path at this node.

**Hold** = Puts your username in the document title in brackets to alert other users that you are looking into this document and will take action later.

**Add note** = Allows you to add a note to the document for the student and other approvers to see.

**Blanket approve** = Overrides ALL levels of approval for this document.

**Superuser functions** = If you click ‘superuser functions,’ you will see the document again. Scroll down to see the following actions:

# Workflow Exception Routing for eDocs

Select a route node:    
  Select a node name:

**Approve document** = Approves the document for all nodes, acts the same as “blanket approve”

**Document route level approve** = Approves the document up to the selected route node. The route node you selected will still have to approve the document before it is finalized.

**Disapprove document** = Disapproves the document as if you were in the route path at this node

**Cancel document** = Cancels the document as if you were in the route path at this node

**Return to previous route level** = Returns the document to the selected route node

The best way to approve ONLY the current node is to scroll to the bottom of the page and click ‘Approve.’

## Super User Action on Action Requests

APPROVE Requested of SIS.NW.REGR	
Request Date	11:22 AM 08/27/2007
Request Status	ACTIVE
Responsibility	SIS.NW.REGR
Annotation	
Route Level	SIS.SR.DropAdd.Registrar
Routing Priority	1
Responsibility Id	51395
Action Request Id	2700128
<input type="button" value="approve"/>	