Case Western Reserve University
EST. 1826

Faculty Guide

Student Information System · www.case.edu/projects/erp/sis

The goal of the Student Information System (SIS) implementation project is to build a secure, flexible, easy-to-maintain environment for creating and managing academic records.

The new Student Information System and, therefore, this guide, includes some new terminology which will be displayed in **bold** throughout the guide. A glossary of new SIS terms, their previous equivalents, and detailed definitions are included on pages 14 and 15 of this guide.

NOTE

At the time of publication not all functionality described is available. Please visit the project website for updates. www.case.edu/projects/erp/sis

Dear Colleagues,

Welcome to the new Student Information System (SIS). As executive sponsor for the SIS project, I am excited for the Case Western Reserve community to discover what the system has to offer.

The SIS is a secure, flexible, easy-to-maintain environment for creating and maintaining academic records. Highlights include:

- Class and advisee rosters with photos and e-mailing options
- Semester schedule and configurable weekly schedule
- On-line grade entry for instructors with proxy options
- Pre-requisite/co-requisite checking at registration
- Convenient access to grant permissions, overrides, and release advising holds

Replacing the university's aging and unsupported student information system with a robust and powerful on-line system has been a major endeavor. The project team has put countless hours into making it a success, and now you will be able to experience the fruits of their hard work.

If you have any questions regarding the new system, please do not hesitate to contact the project team. Please see the Contact Information section of this guide for a list of SIS resources.

Donald L. Feke

DONALD L. FEKE

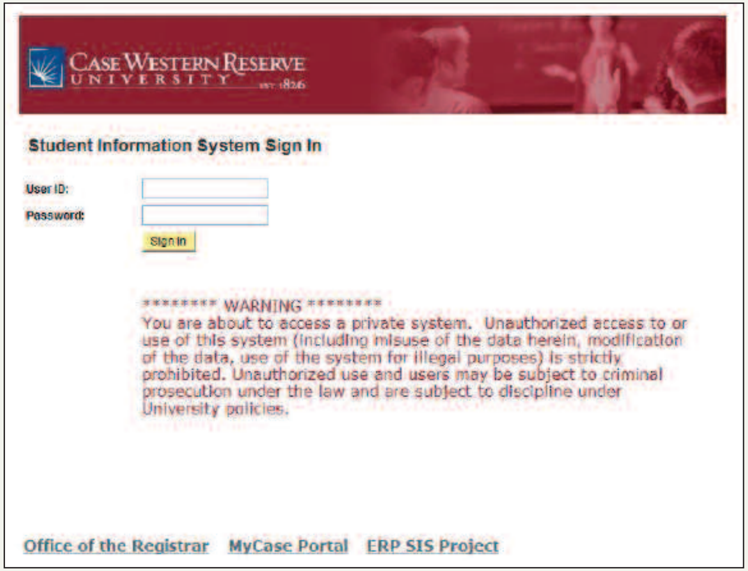
Executive Sponsor for the Student Information System

Vice Provost for Undergraduate Education

Sign in is simple and secure.

The URL to access the system is **www.case.edu/erp/sis**

TIP Save the URL as a favorite.
No VPN required.



SIS Sign-in page

Sign out.

Once inside the system, you can log out by clicking the Sign Out link on the blue tab in the upper-right corner of any screen.

TIP Once in the SIS, **do not** use your Internet browser's **Back** button—this could cause you to lose information.

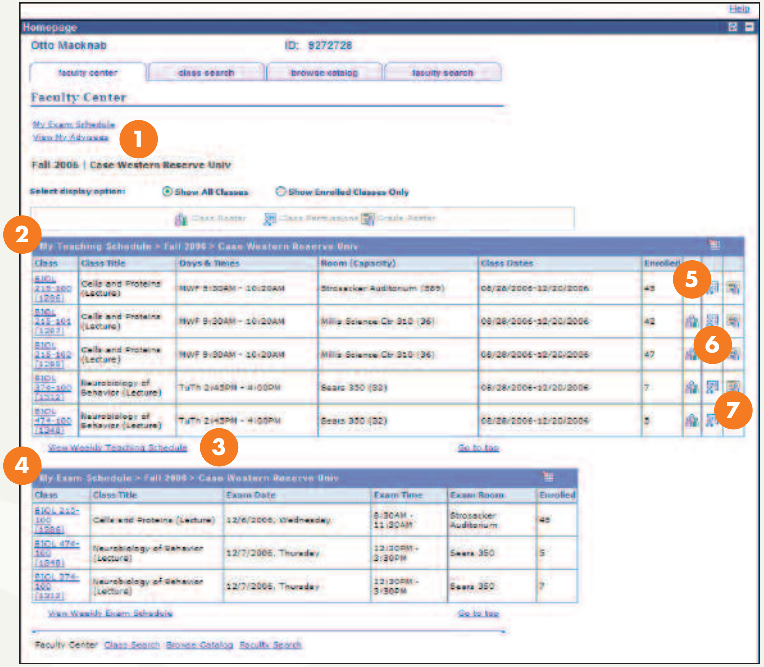
IMPORTANT SECURITY FEATURE The SIS automatically signs you out after 20 minutes of inactivity.

SIS Sign-out page detail

The Faculty Center is the main launching point for accessing both teaching and advising information.

My Teaching Schedule is the first feature you see when you log in to the Faculty Center. From this grid, you can view your Class Schedule, Exam Schedule, Class Roster, and Permissions.

My Exam Schedule, directly beneath the Teaching Schedule, enables you to view the final exam schedules for your classes as soon as they are published.



Faculty Center

1 **View My Advisees.** Connect to your advisee roster and advising tools through this link.

2 **My Teaching Schedule.** View classes you are teaching, the days and times, meeting locations, and enrollment totals. Link to Class Roster (5), Permissions (6), and Grade Roster (7).

3 **Weekly Schedule.** Click the View Weekly Teaching Schedule link to see your schedule organized by week rather than by class number and title.

4 **My Exam Schedule.** Lists the dates, times, and locations of final exams for classes you instruct as soon as the information is published.

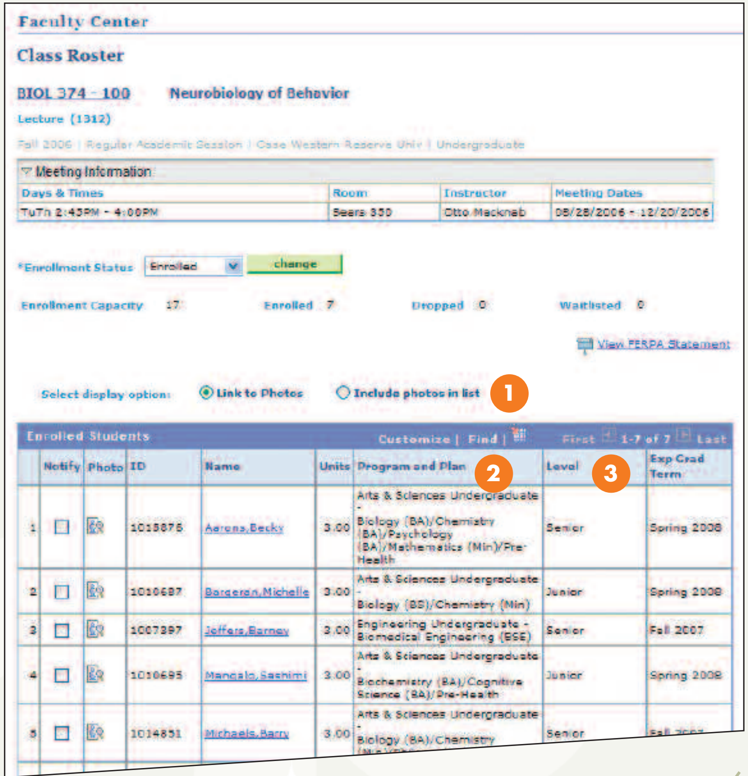
5 **Class Roster.** Click on this icon to connect to a class list, e-mail students, and view student photos. (Refer to page 6 for full screen view of this link.)

6 **Permissions.** Click on this icon to override prerequisites, class limits, and grant consent to students to enroll in your class. (Refer to page 8 for full screen view of this link.)

7 **Grade Roster.** Click on this icon to review and submit grades online. (Refer to page 9 for full screen view of this link.)

Class Roster.

Class Roster streamlines the process of viewing student data and communicating with students.



1 To view student photos along with the Class Roster list, click the Include Photos in List radio button. This will bring up the photo of the first student in Class Roster. To see all student photos click the View All link. To return to the Class Roster without photos click the Link to Photos radio button.

2 Each student's **Academic Program** is listed under **Program and Plan**.

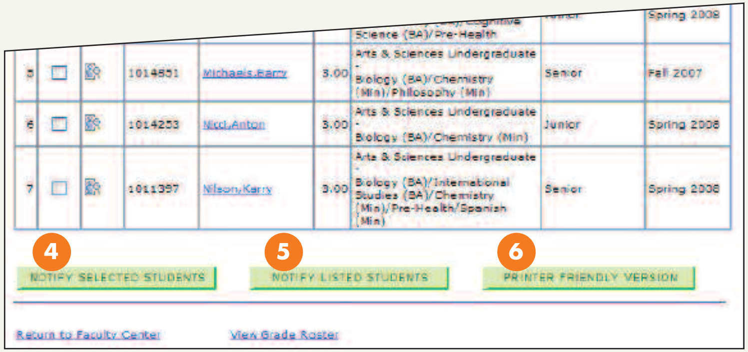
3 Each student's academic level is listed under Level.

4 You can e-mail one student or a select group of students by clicking the check box next to their name(s) and clicking the Notify Selected Students button.

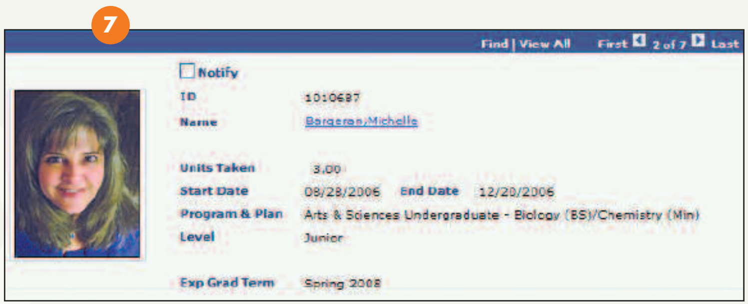
5 You can e-mail all students on the Class Roster by clicking the Notify Listed Students button.

6 To print the Class Roster, click the Printer Friendly Version button and print using your browser's delivered print functionality.

7 View of Class Roster with student photo.



Class Roster



Class Roster with student photos

Permissions.

The Permissions screen allows you to override prerequisites and grant consent to students who want to enroll in your classes.

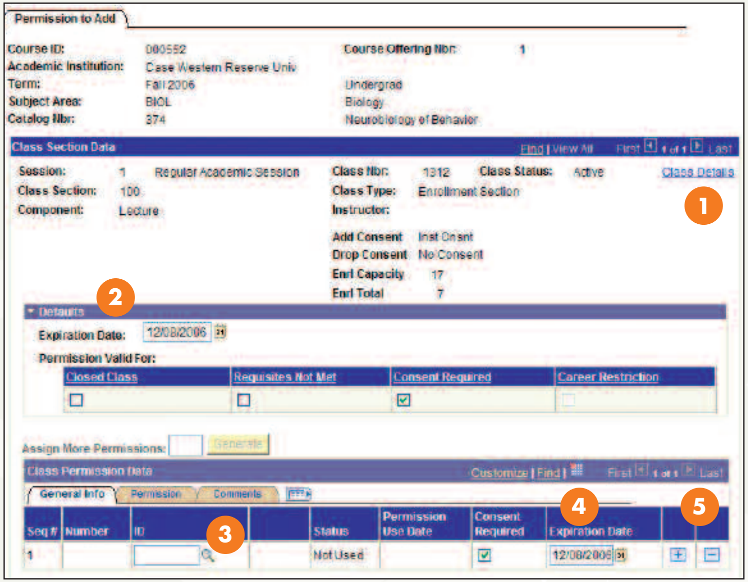
1 Click the Class Details link to view what students see in the Class Schedule. It lists all enrollment requirements, eg. prerequisites and if consent to add the course is needed.

2 The Defaults section lets you pick permits to apply to all students in the class.

3 The 7-digit Student ID of the student receiving the permit goes in the ID field under Class Permission Data. Click to search for a student.

4 You can assign an Expiration Date by which the student must use the permit to add your class.

5 Click to add a student to the permission list. Click to remove a student from the list.



Class Permissions

Grade Roster.

Grade Roster enables you or your designee to enter grades.

1 Final grades will be entered and submitted in SIS. The Approval Status dropdown menu indicates if the official grades for this class have been submitted.

2 The Roster Grade dropdown menu contains the applicable grades for each student.

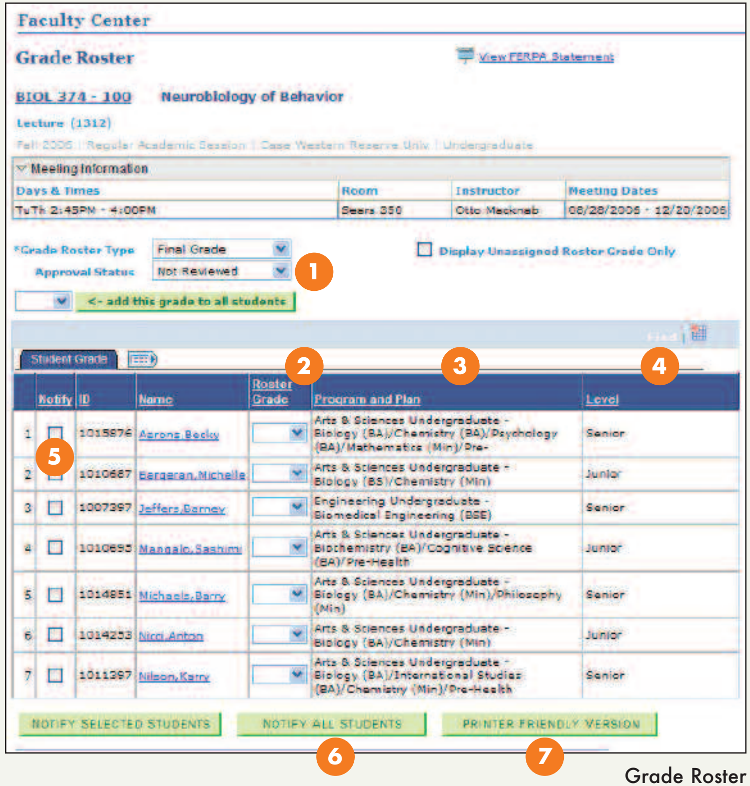
3 Each student's **Academic Program** is listed under **Program and Plan**.

4 Each student's academic level is listed under Level.

5 You can e-mail one student or a select group of students by clicking the check box next to their name(s) and clicking the Notify Selected Students button.

6 You can email all students on the Grade Roster by clicking the Notify All Students button.

7 To print the Grade Roster, click the Printer Friendly Version button and print using your browser's delivered print functionality.



Grade Roster

Click on View My Advisees from the Faculty Center to access the Advisee Roster–your tool for e-mailing advisees, releasing advising holds, and seeing advisees' Student Centers.

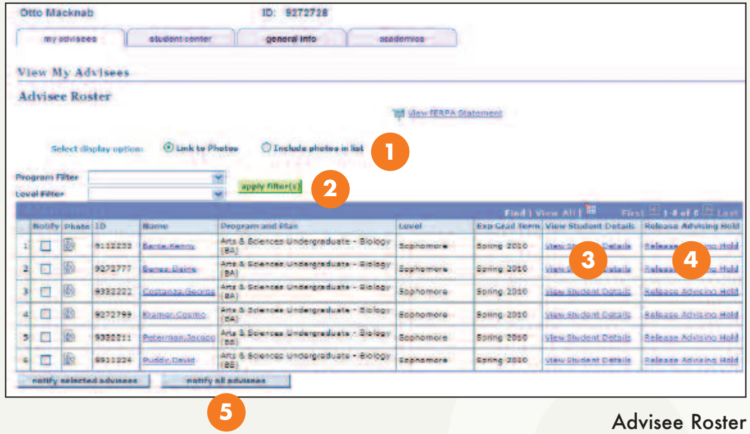
1 Click the Include Photos in List radio button to see photos of advisees.

2 Use the **Program** and Level filters to select the type of advisee that appears in the roster.

3 Click View Student Details to see an advisee's Student Center, where you can access tools like **My Planner**, **Shopping Cart**, and **Advisement Reports** *(Refer to page 11 for further details)*.

4 Click Release Advising Hold each semester to permit a student to register for classes. PINS are no longer necessary.

5 You can email one advisee or a select group of advisees by clicking the check box next to their name and clicking the Notify Selected Advisees button. You can email all advisees in the Advisee Roster by clicking the Notify All Advisees button.



Advisee Roster

From the Advisee Roster screen, click the View Student Details link next to a student's name to access these features in the Student Center:

1 View an advisee's **Shopping Cart** of class choices prior to enrollment. *(Refer to page 13 for full screen view of this link.)*

2 View an advisee's **Planner** prior to enrollment.

3 View an advisee's class schedule.

4 View holds on an advisee's record.

5 View an advisee's **Enrollment Appointments**.

6 Find your advisee's contact information.

7 View an **Advisement Report** (formerly known as the Degree Progress Report or DPR) of an advisee's academic requirements.

8 View the Course History for an advisee. *(Refer to page 12 for full screen view of this link.)*

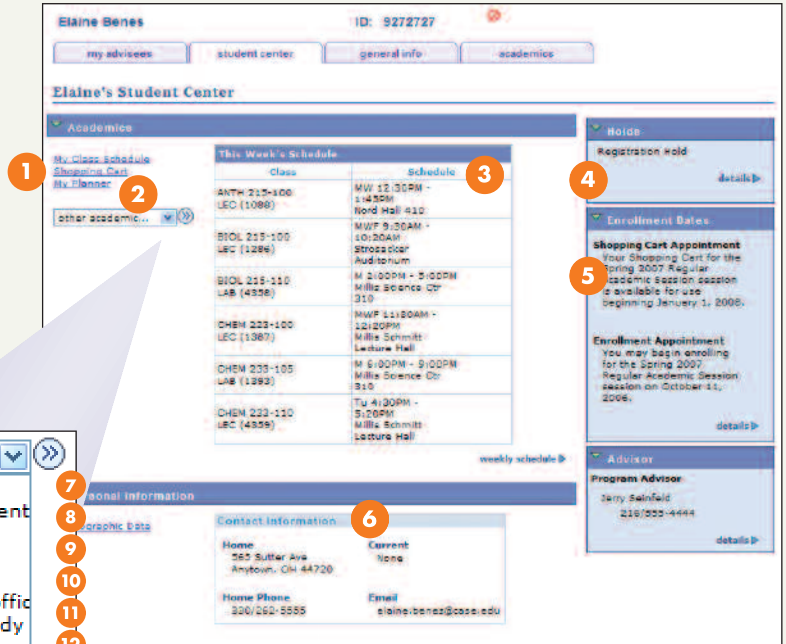
9 View an advisee's final exam schedules.

10 View an advisee's grades.

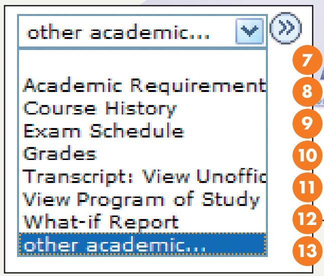
11 View an advisee's unofficial transcript.

12 Approve a graduate student's **Program of Study**. *(Refer to page 13 for full screen view of this link.)*

13 Create an advising **What-if Report** that shows progress toward a degree if a student would choose a different **Program** or **Plan**.



Advisor view of an advisee's Student Center



Other Academic dropdown box

The Course History, Shopping Cart, and My Planner features allow advisors to see their advisee's past, present, and future enrollment plans.

Course History

The Course History screen is where you can view a list of courses the student has transferred, taken, or in which they are currently enrolled.

My Course History

Select Display Option
- Hide courses from My Planner
- Show courses from My Planner

Sort results by
Then by
sort

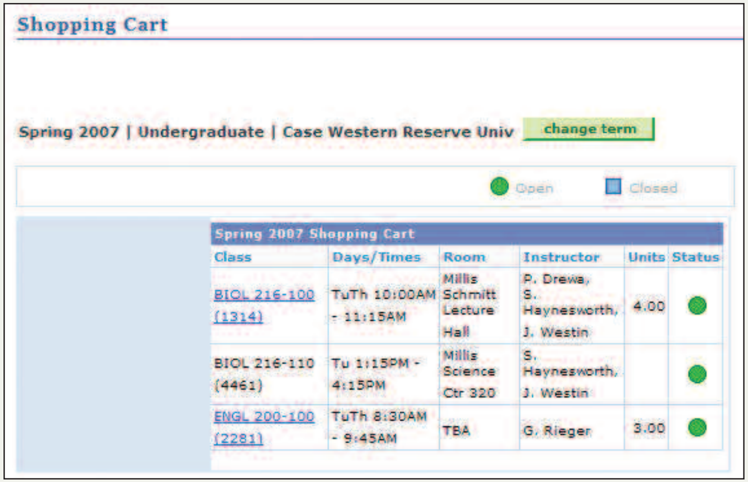
Taken — Transferred — In Progress

Course	Description	Term	Grade	Units	Status
BIOL 214	Genes and Evolution	Spring 2004	RPT	4.00	Taken
BIOL 214	Genes and Evolution	Spring 2005	B	4.00	Taken
BIOL 215	Cells and Proteins	Fall 2004	C	4.00	Taken
BIOL 216	Organisms and Ecosystems	Spring 2006	C	4.00	Taken
BIOL 302	Human Learning and the Brain	Spring 2006	A	3.00	Taken
BIOL 343	Microbiology	Spring 2006	C	3.00	Taken
BIOL 344	Laboratory for Microbiology	Spring 2006	C	2.00	Taken
BIOL 362	Prin of Developmental Biology	Fall 2006	B	3.00	Taken
BIOL 363	Experimental Develop Biology	Spring 2007	A	3.00	Taken
BIOL 374	Neurobiology of Behavior	Fall 2006		3.00	In Progress
BIOL 385	Seminar in Biology of Learning	Spring 2007	A	3.00	Taken
CHEM 105	Principles of Chemistry I	Fall 2003	B	3.00	Taken
CHEM 106	Principles of Chemistry II	Spring 2004	C	3.00	Taken
CHEM 113	Principles of Chemistry Lab	Spring 2004	B	2.00	Taken

The advisee's Course History

Shopping Cart

The **Shopping Cart** displays the class(es) in which a student wants to register prior to the enrollment request being submitted. Students can begin placing classes in their Shopping Cart prior to their advising hold being removed and before their **Enrollment Appointment** begins.


Shopping Cart

Spring 2007 | Undergraduate | Case Western Reserve Univ   change term

Open   Closed

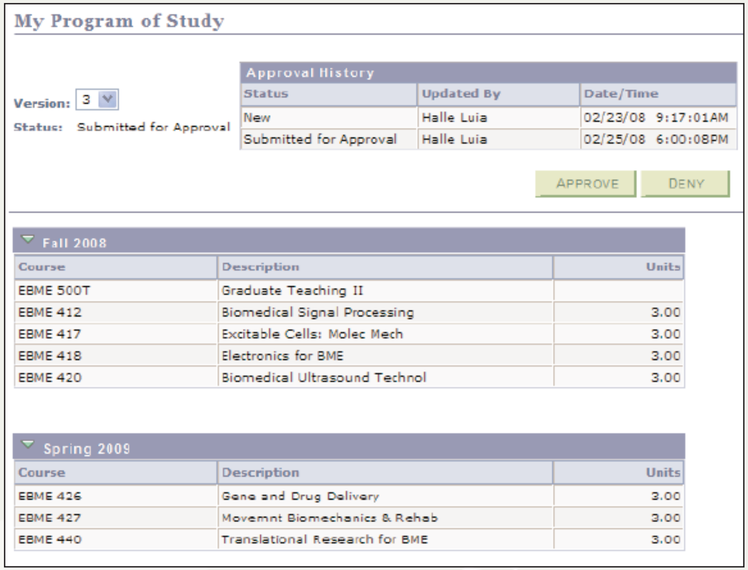
Spring 2007 Shopping Cart

Class	Days/Times	Room	Instructor	Units	Status
BIOL 216-100 (1314)	TuTh 10:00AM - 11:15AM	Millis Schmitt Lecture Hall	P. Drewa, S. Haynesworth, J. Westin	4.00	
BIOL 216-110 (4461)	Tu 1:15PM - 4:15PM	Millis Science Ctr 320	S. Haynesworth, J. Westin		
ENGL 200-100 (2281)	TuTh 8:30AM - 9:45AM	TBA	G. Rieger	3.00	

View an advisee's Shopping Cart

My Program of Study

For graduate advisees, use the My Program feature of the **Planner** to access the individual's Planned **Program of Study**.


My Program of Study

Version: 3

Status: Submitted for Approval

Approval History

Status	Updated By	Date/Time
New	Halle Luia	02/23/08 9:17:01AM
Submitted for Approval	Halle Luia	02/25/08 6:00:08PM

APPROVE   DENY

Fall 2008

Course	Description	Units
EBME 500T	Graduate Teaching II	
EBME 412	Biomedical Signal Processing	3.00
EBME 417	Excitable Cells: Molec Mech	3.00
EBME 418	Electronics for BME	3.00
EBME 420	Biomedical Ultrasound Technol	3.00

Spring 2009

Course	Description	Units
EBME 426	Gene and Drug Delivery	3.00
EBME 427	Movemnt Biomechanics & Rehab	3.00
EBME 440	Translational Research for BME	3.00

View and approve or deny a graduate student's Planned Program of Study

SIS TERM	PREVIOUSLY KNOWN AS...	DEFINITION
Academic Career	N/A	Term that classifies both students and curricula as belonging to one of nine categories: Undergraduate, Graduate, Management, Law, Medicine, Applied Social Sciences, Nursing, Dental, and Non-degree.
Academic Organization	Departments	Colleges, schools, and departments that conduct curricular studies at Case Western Reserve University. Academic Organizations are responsible for maintaining their class schedules in SIS each term.
Academic Plan (Plan)	Majors, Minors	The method by which a student pursues their studies. For undergraduate students, majors and minors are Academic Plans. In the School of Graduate Studies, Plan A and Plan B options are Academic Plans.
Academic Program (Program)	School or College	The program to which a student is admitted and/or from which he or she graduates. For example, there is an undergraduate Academic Program in the College of Arts and Sciences. In the School of Graduate Studies, an **Academic Program** is the scholarly pursuit to which the student is admitted; for example, the doctorate program in Astronomy.
Advisement Report	DPR	Compares the classes and benchmarks that a student has achieved towards fulfilling graduation requirements. Advisement Reports list each class a student has completed, grades achieved (if applicable), credits earned (if applicable), and classes yet to be taken to fulfill requirements.
Class Components	N/A	The primary format of a class or class section; for example, lecture, lab, recitation, seminar, clinical.
Class Number	CRN	Each class offering of a course is assigned a unique four-digit number when created.

Class Section	N/A	Each class offering is assigned a class section number that makes it easily identifiable within the course. The first scheduled class section of a course is 100.
Enrollment Appointment	Registration Start Date	The date a student may begin to register for classes
Planner (My Planner)	N/A	A self-service tool that enables students to select courses they want to take in upcoming semesters from the Course Catalog. For students in the School of Graduate Studies, the Planner is attached to My Program, which allows students, advisors, and the School to view, approve, or deny changes to a student's Planned Program of Study (POS).
Service Indicators ⊘ Negative Service Indicator ★ Positive Service Indicator	Holds	Also known as Holds on the Student Center screen. Can be positive or negative. Negative service indicators may prevent students from enrolling in upcoming terms. Advising Holds, for example, are negative and are applied to students who are required to see an advisor prior to registration. Advisors can remove the Advising Hold once they have met with a student. This process eliminates the need for PIN numbers.
Shopping Cart	N/A	Works with the Schedule of Classes and holds the classes in which a student wants to enroll before submitting an enrollment request. Students enroll in classes via their shopping cart once their enrollment appointment (or open enrollment) arrives. Advisors can view their advisees' Shopping Carts before enrollment.
Sub-Plan	Tracks, Concentrations	A track or concentration that the student is following within an Academic Plan.
What-If Report	N/A	A report that asks, "What if this student were to change majors?" Compares the student's current curriculum and benchmark achievements with a proposed major and minor combination, and lists the requirements that would and would not be satisfied if the student were to make a change.
Term	Semester	The internal name for a semester and year. For example, Fall 2008 is a term.

SPOT stands for Self-Paced Online Training. It's available while you work in the system.

To get started, just click the blue, underlined Help link that appears in the upper right-hand corner of the Faculty Center home page. This launches SPOT in a new window.

Find the topic you want to learn more about, and then left click on it. This highlights the topic name (**a**).

In the upper right-hand corner you will see three options for learning: **See It!**, **Try It!**, and **Do It!** Click on the one you would like to activate.

About the SPOT help features in SIS:

1 See It! enables you to learn by watching an animated demonstration of operations in a simulated environment. All the required activities (moving the mouse, entering data, etc.) are completed automatically.

2 Try It! enables you to learn interactively. SPOT prompts you to perform mouse clicks or keystrokes as you complete tasks in a simulated environment.

3 Do It! enables you to learn interactively while you work with actual data in the live system. You are presented a small window that displays each step for a particular task. As you complete a step, click the Next Step button to display the next step in the process.

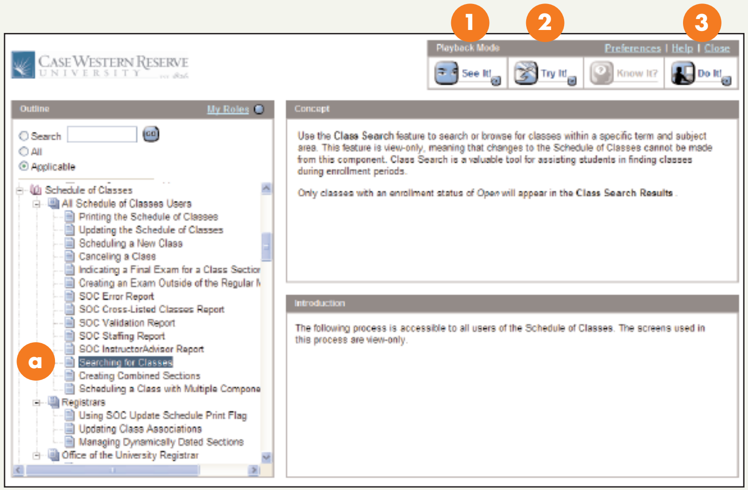


Table of Contents in SPOT

Contact Us.

erpsis@case.edu

This address is monitored by the ERP Student Information System (SIS) team. General questions about the SIS should be directed to this address.

reghelp@case.edu

This address is monitored by the University Registrar's Office to answer questions about self-service and student system functionality.

courses@case.edu

This address is monitored by the University Registrar's Office to help answer any questions relating to the schedule of classes, classrooms, and courses.

registrar@case.edu

This address is monitored by the University Registrar's Office to help answer any questions relating to registration, records, and policies.

As always, you can contact the Help Desk 24/7 at 368-HELP.

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http://www.case.edu/projects/erp/sis

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