Case Western Reserve University
est. 1826


# Student Guide

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

The Student Information System (SIS) provides a secure, flexible, web-based environment for creating and managing academic records.

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The new Student Information System (SIS) 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 22 and 23 of this guide.

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**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 Students,

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

The SIS is a secure, flexible, web-based environment for creating and maintaining academic records. Highlights include:

- Web based system that you can access anywhere, anytime
- Easy access to your academic information
- Enhanced degree audit reporting with capability to integrate directly with the registration process
- Ability to create a "what if" degree audit report
- Electronic Planned Program of Study to assist graduate students with degree progress
- Semester schedule and configurable weekly schedule
- Access to financial information
- Easily add/update personal information
- Ability to create an authorized user account

Replacing the University's aging and unsupported student 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**

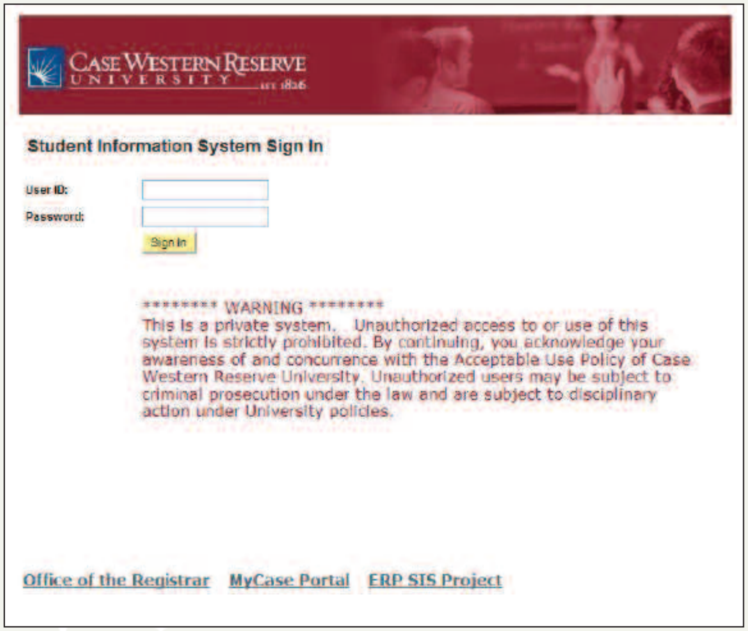
You will sign in using your Case Network ID and the associated password.

**TIP** User ID and password are case sensitive.

Save the URL as a favorite.

No VPN required.

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

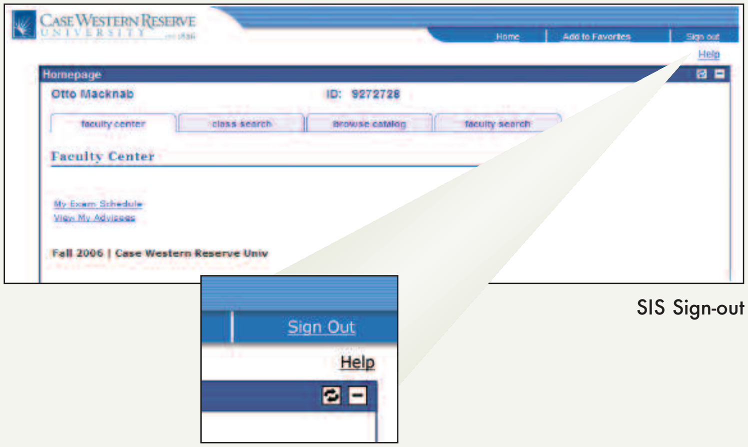



SIS Sign-in

## Sign out.

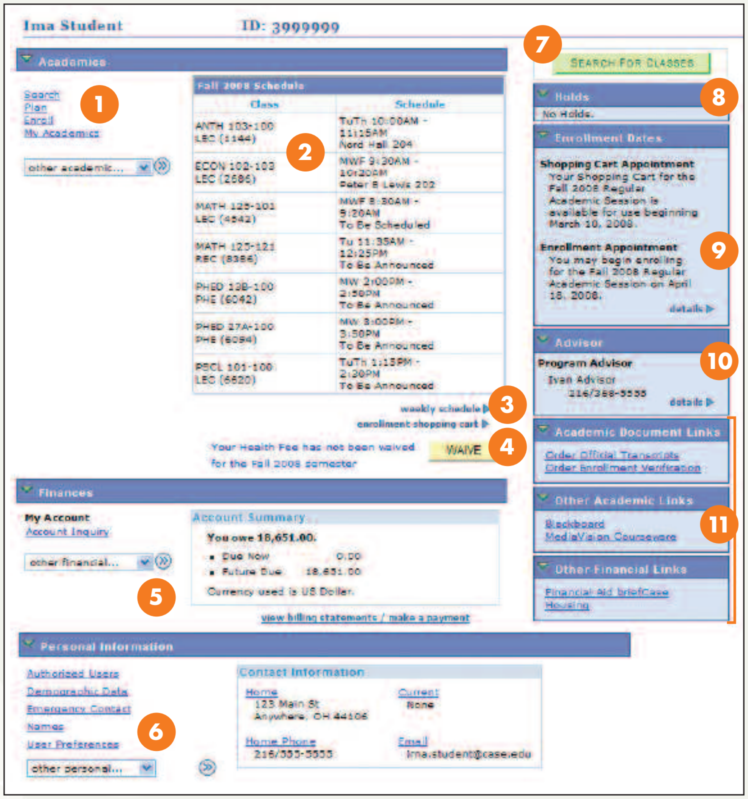
Once inside the system, you can log out by clicking the Sign Out link on the blue tab in the upper-right corner of any screen.

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




SIS Sign-out

The Student Center is the main launching point for accessing academic, financial and personal information.



Student Center

Academics, is at the top of the screen in the Student Center. From here you can view your weekly class schedule. There are also links to other academic features of SIS, such as Enrollment, Course History and Grades.

Finances, beneath Academics, enables you to view an account summary. It also contains other financial links such as Account Inquiry, Account Activity, Charges Due, Payments and Pending Financial Aid. You can also access your bill and make an online payment.

Personal Information, directly below Finances, allows you to update your contact information. From here you can set up Authorized Users, set User Preferences, update Emergency Contact information and more.

1 **Academic Links.** These links allow you to access additional functionality of SIS including grade reports, **Advisement Reports** and **What-If Reports**.

2 **This Week's Schedule.** Displays information on the classes in which you are currently enrolled. To view your weekly class schedule in a grid format click the Weekly Schedule link at the bottom of the grid.

3 **Enrollment Shopping Cart.** Click the enrollment shopping cart link to view the **Shopping Cart** screen where you can select the classes you wish to enroll in prior to your **Enrollment Appointment** date. Once classes are in your cart you can "validate" them to see if you have everything you need to register.

4 **Health Waiver.** This link allows you to waive the health insurance fee each semester. *The CWRU Medical Plan fee is automatically charged on a per semester basis to students registered for one or more credit hours.* If you have health coverage you are eligible to waive the Medical Plan fee.*

5 **Finances.** View account information and make payments from this section. You can see summary and detail information as well as pending financial aid and charge and payment history.

6 **Personal Information.** View and update contact information including home and current address, home phone number and email address. Also link to authorized user setup and emergency contact information.

7 **Search For Classes.** Click the Search for Classes button to transfer to the searchable schedule of classes.

8 **Holds.** Displays any holds associated with your record. You may click the Details link for more information.

9 **Enrollment Dates.** Displays information on when you can access the **Shopping Cart** and when you may begin to enroll in classes.

10 **Advisor.** Displays advisor(s) name and contact information. You may click the Details link for additional contact options.

11 **Links.** These links will allow you to access additional academic and financial resources.

* No medical plan fee is charged for the summer **Term**.

The Search for Classes screen provides a variety of criteria to refine your search.

**1** The **Term** drop down list allows you to select the appropriate **Term**. You must select a **Term**.

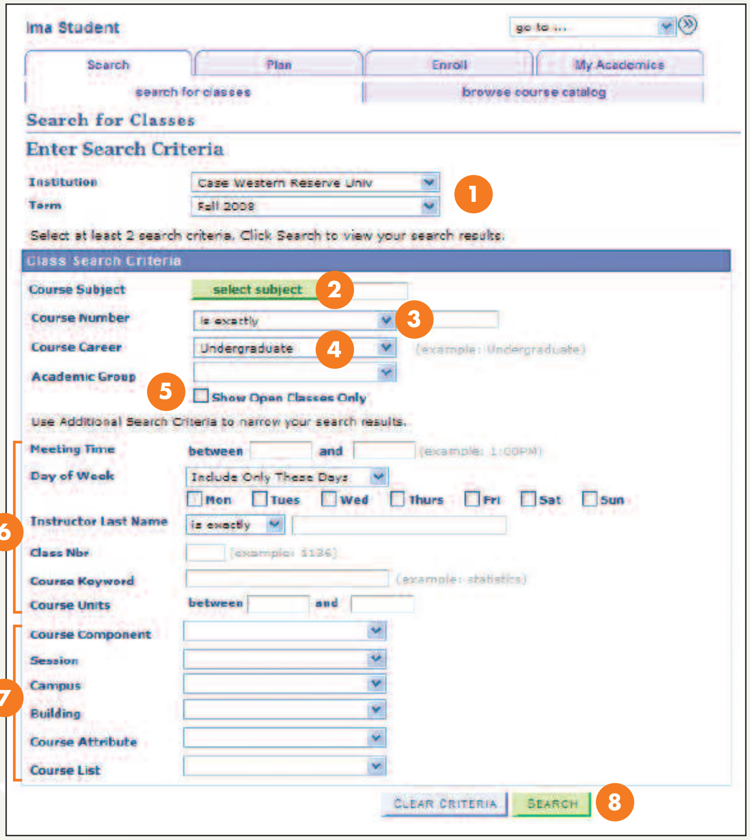
**2** Enter the Subject under which the course is listed in the Catalog, or click the Select Subject button to view an alphabetized list of subjects from which to choose.

**3** Enter the course number that identifies the course in the catalog.

**4** The **Course Career** drop down list allows you to select the appropriate career for the course you are searching for.

**5** The **Academic Group** field lets you narrow your results to courses in a particular academic group, for example the Schools of Engineering and Management.

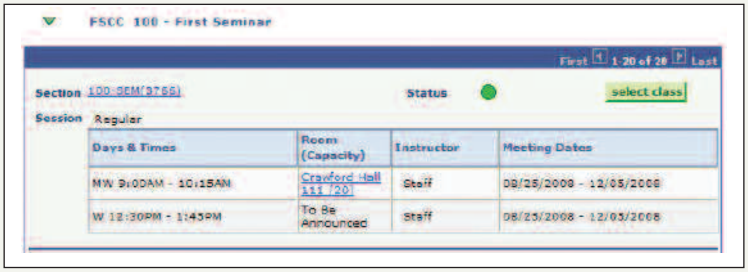
**6** Limit your search to particular times, days of the week, instructor, and keyword.




Search for Classes

**7** **Course Component,** Session, Campus, Building, Course Attributes, Course Lists enable you to refine your search even further, for example, a lecture in the regular academic session at Case Western Campus in the Peter B. Lewis Building.

**8** Click the Search button to see the results.




Class Search Results

# Registration.

SIS makes it easy to register for classes. There are a number of ways to search for classes and add them to your **Enrollment Shopping Cart**.

As you have seen in the class search section, there are a variety of search criteria available to help you find the classes that you would like to register for. You can also add classes to your **Shopping Cart** from your Academic Requirements and your **Planner** (links to both can be found in the other academics dropdown list in the Student Center).

For more information on the features of the **Enrollment Shopping Cart** please see page 8 of this guide.

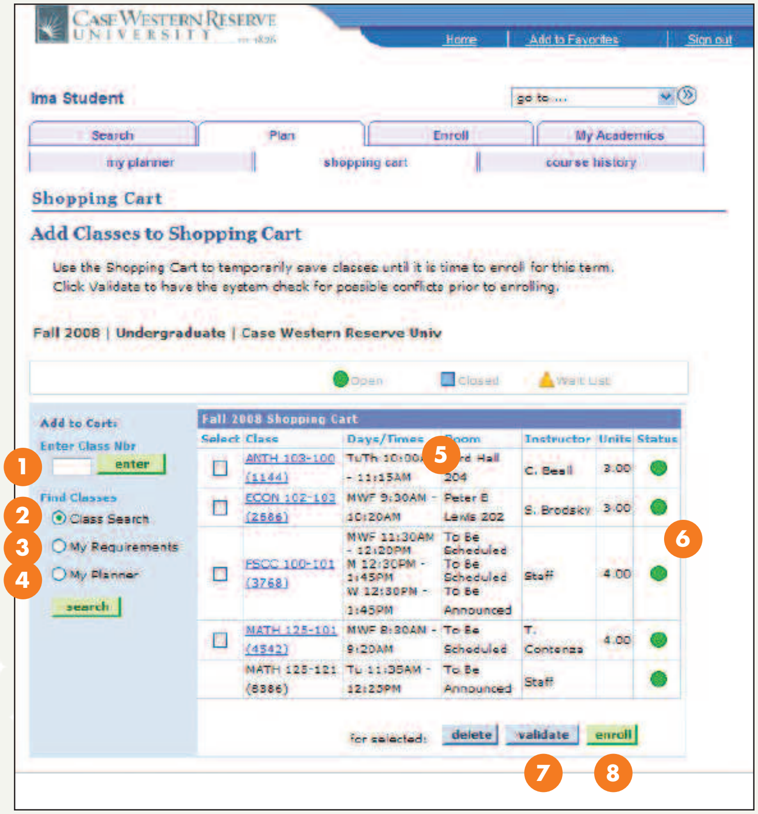
SIS also provides the ability to easily drop, add and swap classes during the drop/add period. Please see page 10 of this guide for more details on this feature of SIS.

The Enrollment Shopping Cart holds the classes you select from the schedule until you are ready to enroll.

Even if your **Enrollment Appointment** date hasn't arrived, or if your advisor hasn't removed your registration advising hold, you can still put classes in your **Shopping Cart**. Once your **Shopping Cart** appointment date has arrived you may begin placing classes in your cart (see the Enrollment Dates on the Student Center for your **Shopping Cart** and Enrollment start dates).

Many students choose to validate their **Shopping Cart** ahead of their **Enrollment Appointment** to see if there are any potential problems that would prevent registration.

From the Student Center click the enrollment shopping cart link to get started. If more than one **Term** is open for enrollment, you will be offered a choice of **Terms**. Select the appropriate **Term** by clicking in its radio button. Click Continue.




Shopping Cart

**1** Enter the **Class Number**, if you know it, to add that class to your **Shopping Cart**.

**2** Select the radio button next to Class Search to select a class from the searchable schedule of classes.

**3** Select the radio button next to My Requirements to select classes from a list of your graduation requirements.

**4** Select the radio button next to **My Planner** to select classes from your **Planner**. To use this feature you must have added classes to your course **Planner**.

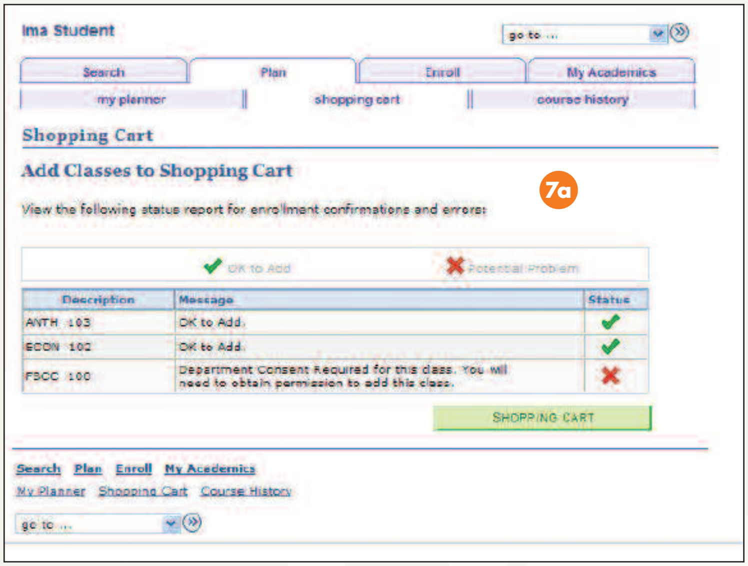
**5** This grid shows classes that have already been added to your **Shopping Cart**.

**6** The Status column shows one of three icons to indicate the status of the class.
An *Open* icon (●) would indicate the class is open.
A *Closed* icon (■) would indicate the class is closed.
A *Wait* icon (▲) would indicate there is a wait list.

**7** Once classes are in your cart, choose one (or more) and click validate.

**7a** Once you click validate a status report appears. The validation process checks for time conflicts, prerequisites, and the need for instructor or departmental permission. There is a status indicator and a message displayed next to each class. The message lets you know if the class is OK to add to your schedule, or if a potential problem could keep you from registering for a class.

**8** You must click the Enroll button once your **Enrollment Appointment** date has arrived in order to register for the selected classes.




Validate Results

# What if you need to drop, add or swap a class?

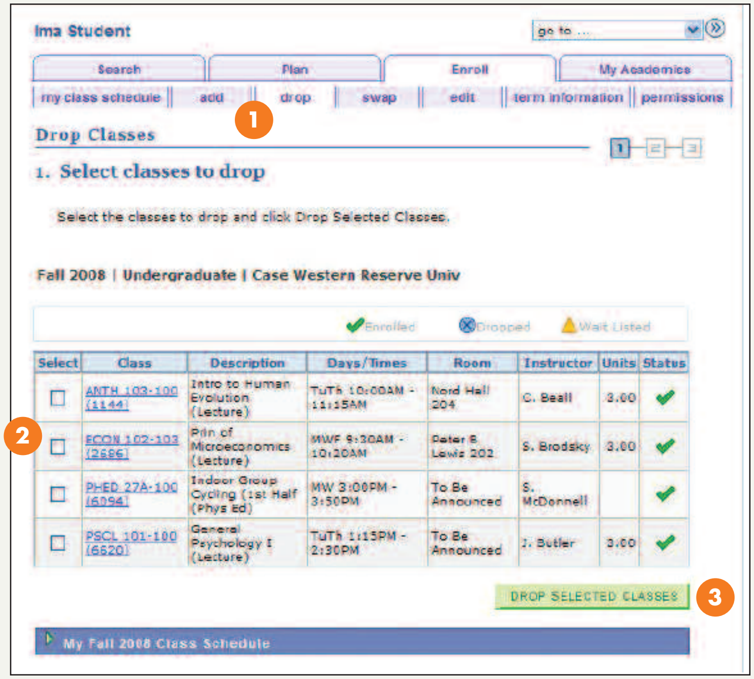
## Drop

Click on the Enroll link in the upper left hand corner of your Student Center.

**1** Click the drop tab to see a list of your classes to drop.

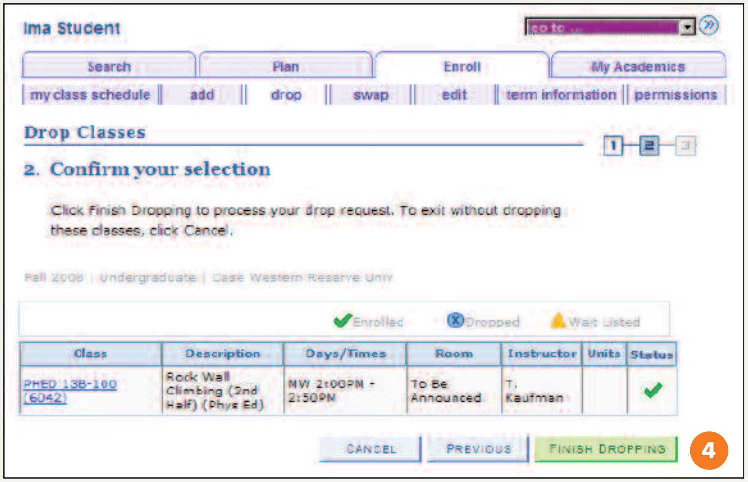
**2** Select the class you want to drop

**3** Click the Drop Selected Classes button.




Drop Classes

**4** Confirm your selection and click the Finish Dropping button.



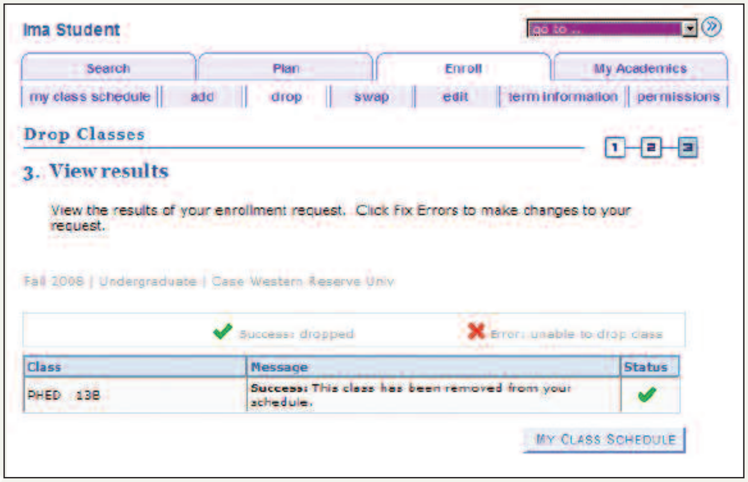

Confirm your Selection

A results screen will appear to show the results of the drop.

There are a few reasons why your drop may be unsuccessful:

- It may be outside of the drop/add period.
- You may need permission to drop the class.

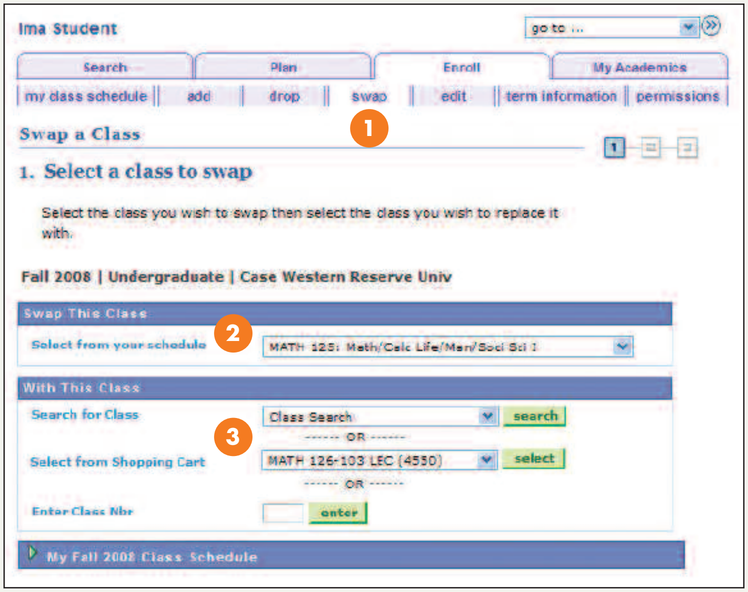
**NOTE** Please contact your school for policy and procedure on dropping classes for each **Term**.




Drop Results

*Drop/Swap continued on next page*

Swap lets you drop and add a class at the same time. You will only be dropped from your old class if you get into the class you are adding.




Swap a Class

## Swap

Click on the Enroll link in the upper left hand corner of your Student Center.

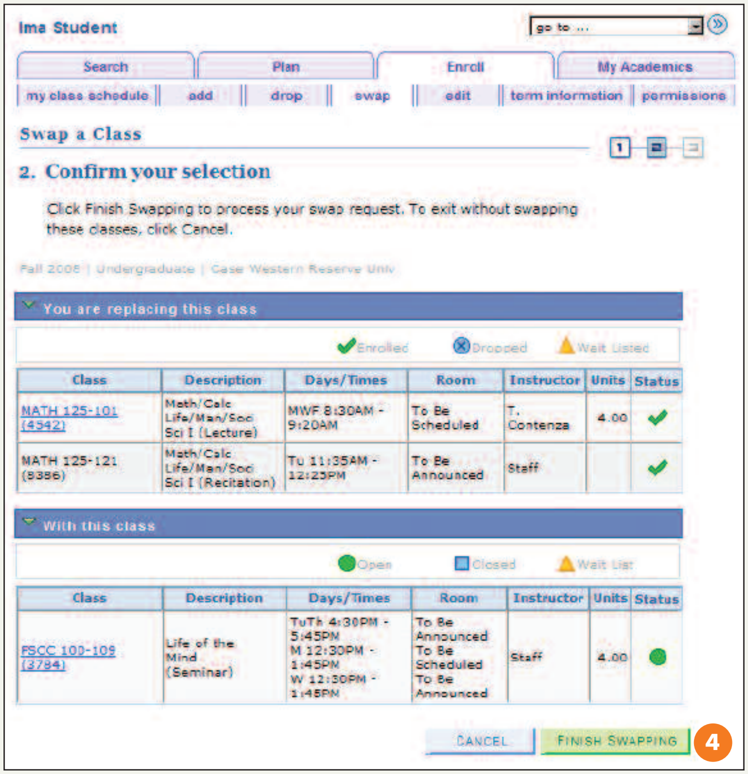
**1** Click the swap tab to go to the Swap a Class screen.

**2** From the drop down list select the class you wish to swap.

**3** Choose a class that you wish to swap to. You can:

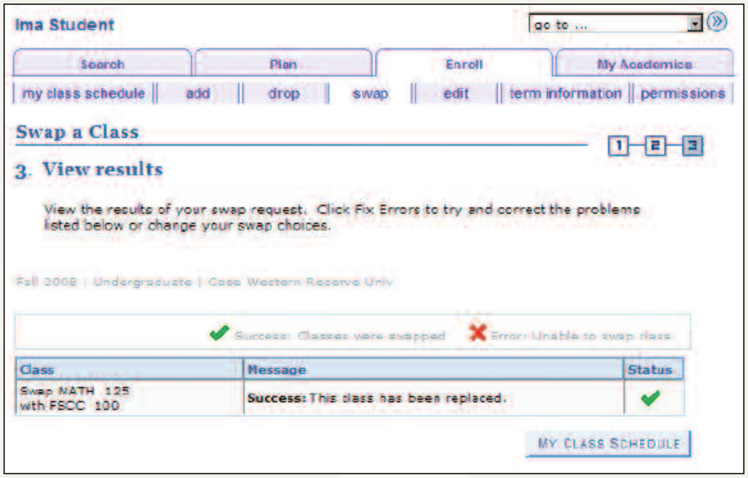
- **a** Perform a class search and select a class from the searchable schedule of classes.
- **b** Select a class from your **Shopping Cart**.
- **c** Enter a **Class Number** (if you know it).

**4** Verify your selection and click the Finish Swapping button.




Confirm Your Selection

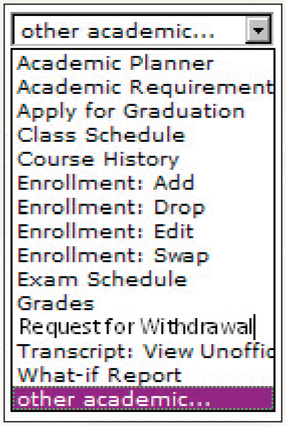
The status column shows a ✓ which indicates the class swap was successful. An ✗ would appear with a message indicating why the swap was unsuccessful.




Swap Results

There are a few ways to view courses and grades. Use the Course History screen, Grades screen or Unofficial Transcript to see your grades and a list of courses.

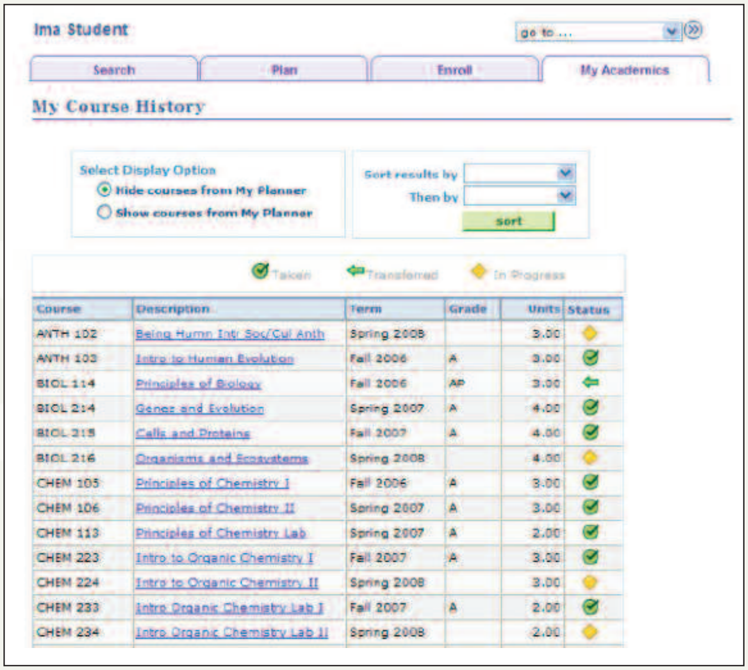
These screens can be accessed from the Student Center using the other academic drop down list.




Other academics Dropdown List

## Course History

The Course History screen shows the classes that are completed, transferred or in progress. The grades are shown for courses that have been completed.

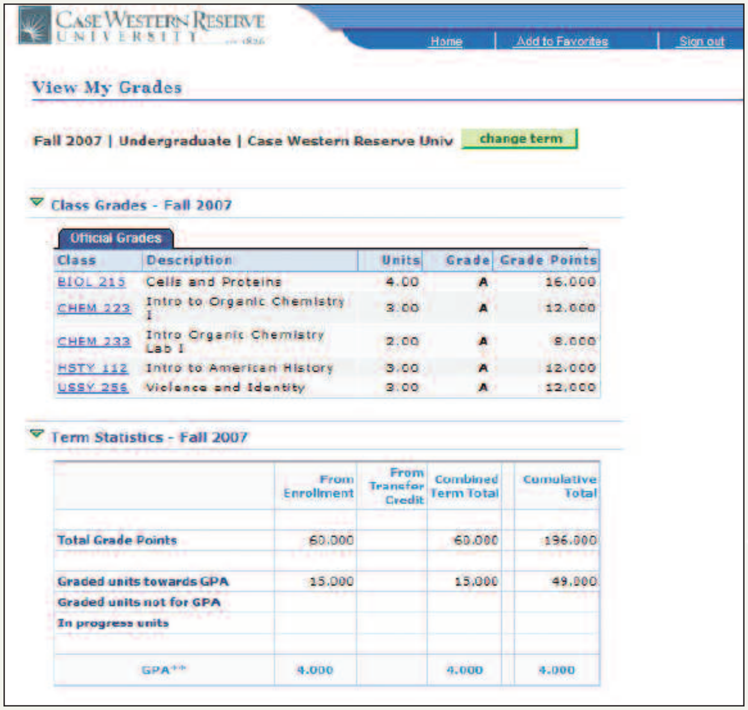



| Course | Description | Term | Grade | Units | Status |
|---|---|---|---|---|---|
| ANTH 102 | Being Humn Intr Soc/Cul Anth | Spring 2008 | | 3.00 | |
| ANTH 103 | Intro to Human Evolution | Fall 2006 | A | 3.00 | |
| BIOL 114 | Principles of Biology | Fall 2006 | AP | 3.00 | |
| BIOL 214 | Genes and Evolution | Spring 2007 | A | 4.00 | |
| BIOL 215 | Cells and Proteins | Fall 2007 | A | 4.00 | |
| BIOL 216 | Organisms and Ecosystems | Spring 2008 | | 4.00 | |
| CHEM 105 | Principles of Chemistry I | Fall 2006 | A | 3.00 | |
| CHEM 106 | Principles of Chemistry II | Spring 2007 | A | 3.00 | |
| CHEM 113 | Principles of Chemistry Lab | Spring 2007 | A | 2.00 | |
| CHEM 223 | Intro to Organic Chemistry I | Fall 2007 | A | 3.00 | |
| CHEM 224 | Intro to Organic Chemistry II | Spring 2008 | | 3.00 | |
| CHEM 233 | Intro Organic Chemistry Lab I | Fall 2007 | A | 2.00 | |
| CHEM 234 | Intro Organic Chemistry Lab II | Spring 2008 | | 2.00 | |

Course History

## Grades

The View My Grades screen lists your grades and grade point statistics by **Term**.




| Class | Description | Units | Grade | Grade Points |
|---|---|---|---|---|
| BIOL 215 | Cells and Proteins | 4.00 | A | 16.000 |
| CHEM 223 | Intro to Organic Chemistry I | 3.00 | A | 12.000 |
| CHEM 233 | Intro Organic Chemistry Lab I | 2.00 | A | 8.000 |
| HSTY 112 | Intro to American History | 3.00 | A | 12.000 |
| USSY 256 | Violence and Identity | 3.00 | A | 12.000 |

| | From Enrollment | From Transfer Credit | Combined Term Total | Cumulative Total |
|---|---|---|---|---|
| Total Grade Points | 60.000 | | 60.000 | 196.000 |
| Graded units towards GPA | 15.000 | | 15.000 | 49.000 |
| Graded units not for GPA | | | | |
| In progress units | | | | |
| GPA** | 4.000 | | 4.000 | 4.000 |

View My Grades

## Unofficial Transcript

Your cumulative grade report/unofficial transcript is updated at the end of each **Term**. It shows the courses you completed, the grades you received, and your statistics per **Term**.

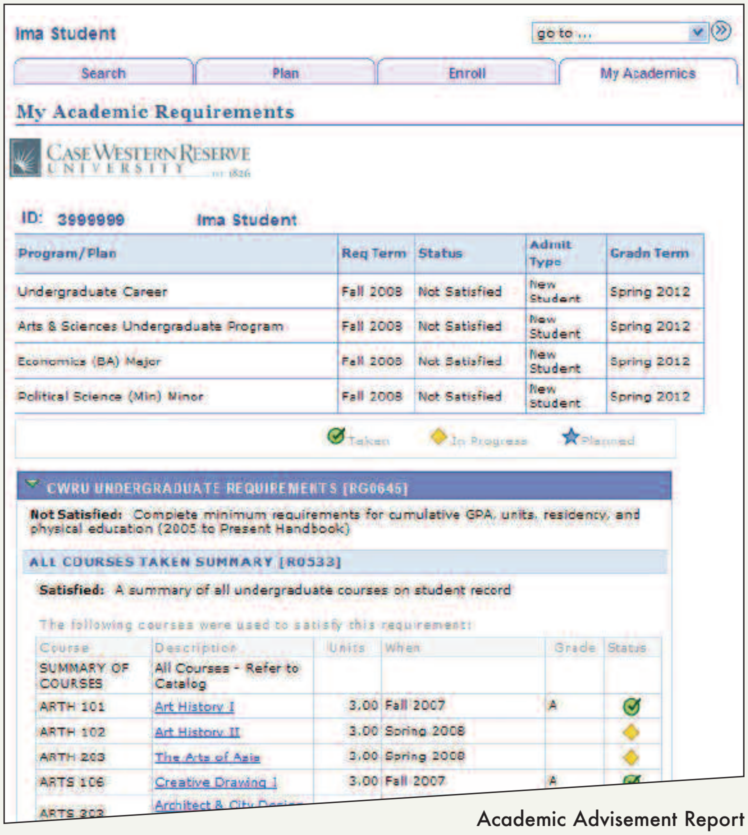

Cumulative Grade Report/Unofficial Transcript

SIS allows you to have real-time access to the same reports your advisor can see: the Advisement Report and What-If Report.

The Advisement Report, What-If Report, and My Planner features allow students to see their past, present, and future enrollment plans.

## Advisement Report

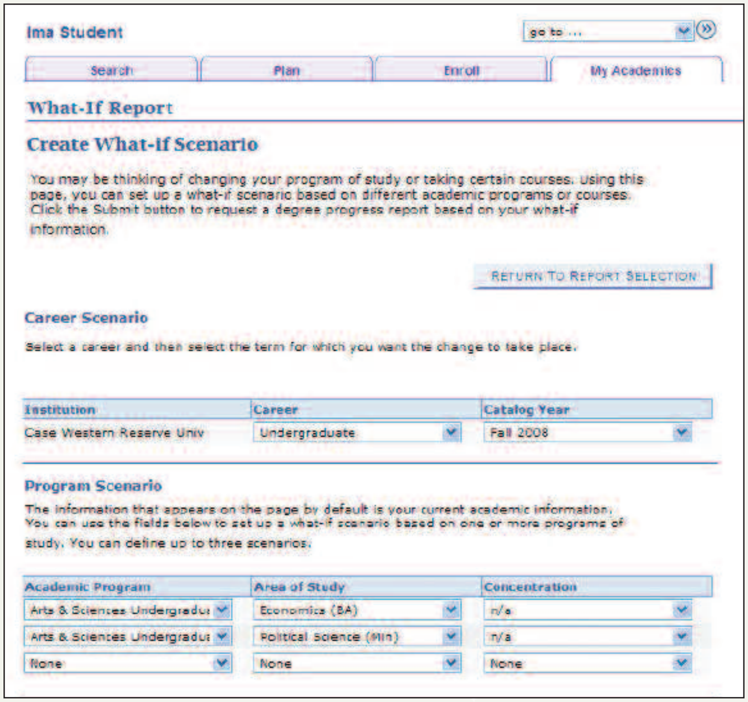
The **Advisement Report** compares your completed coursework against the requirements you must fulfill in order to graduate. It tells you what requirements you have completed, what requirements you have left to complete, and the courses you can use to complete them.




Academic Advisement Report

## What-If Report

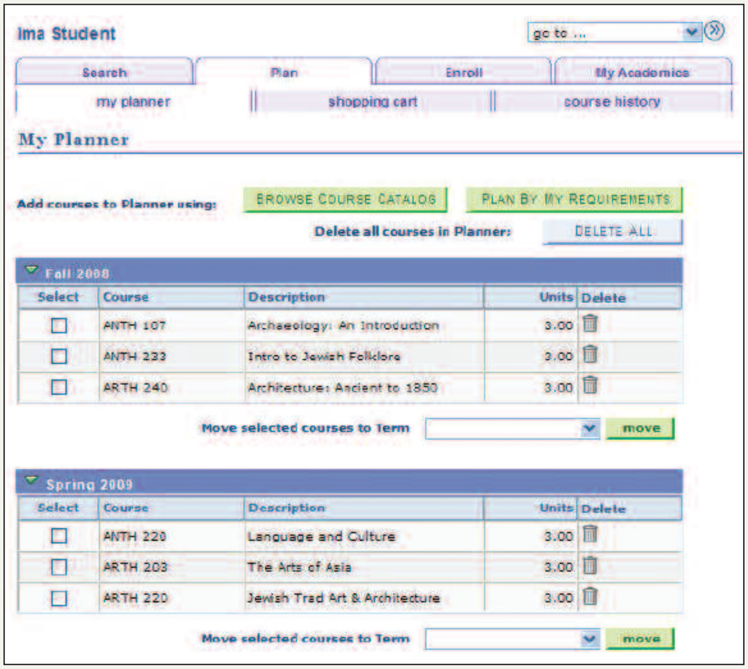
A **What-If Report** lets you see how the courses you have already completed fit into a new program.




What-If Report

## My Planner

**My Planner** will allow you to search the course catalog and select courses you would like to take in the future. You are able to organize the courses by **Term**.




My Planner

# Planned Program of Study (PPOS).

Students in the School of Graduate Studies create a PPOS using the **My Planner** functionality of the SIS. Click on the **My Program** tab to browse the course catalog, add courses to the PPOS, and submit it for approval.

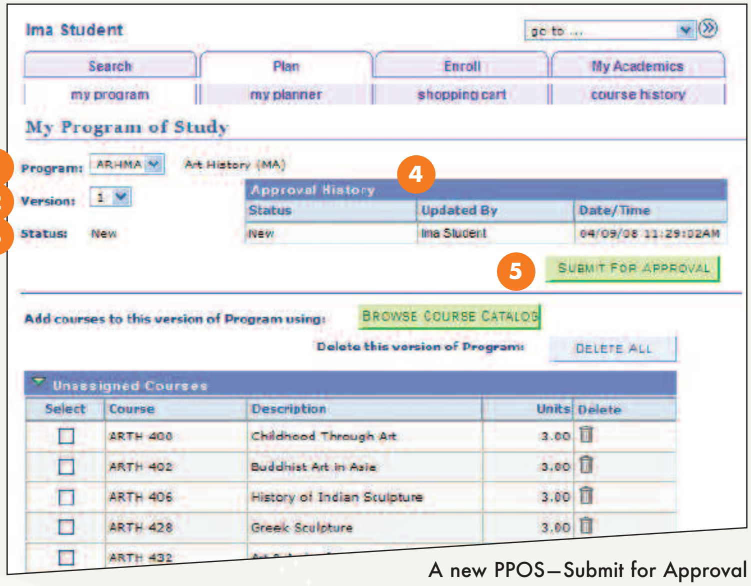
**1** Your **Academic Program**.

**2** The version of the PPOS.

**3** Status of the PPOS.

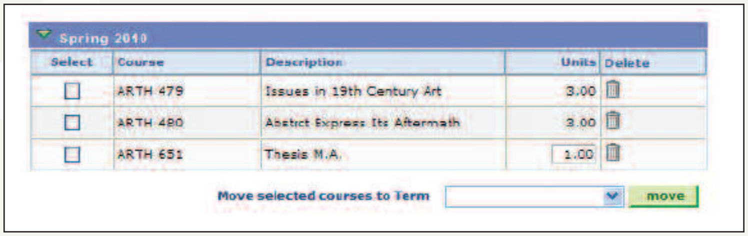
**4** Approval History.

**5** Click here to submit a new PPOS for Approval.




A new PPOS—Submit for Approval

For further instruction on creating your PPOS please contact the School of Graduate Studies.




Adjusting Variable Credit Hours

## Requesting Changes to your Official Planned Program of Study

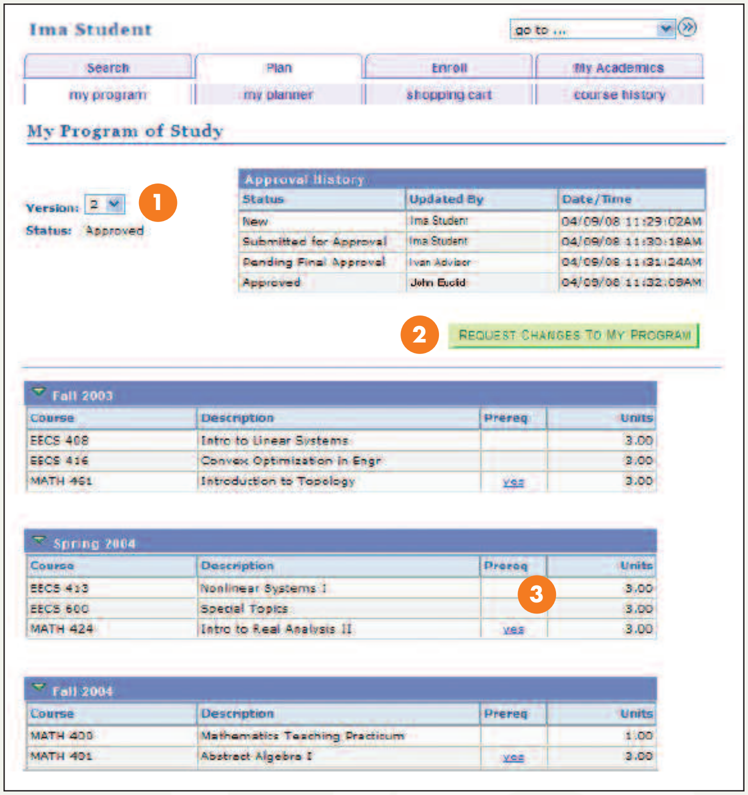
Students who already have a Planned Program of Study can also request changes to it on the **My Program** tab. Clicking the Request Changes to **My Program** button creates a new version of the PPOS from which courses can be removed, added, or moved to another **Term**.

**1** Every time a change to the PPOS is requested, a new version is created. Click on the Version dropdown list to select and view a previous version of your PPOS.

**2** Request Changes to **My Program**.

**3** If a class has a prerequisite, it will be noted in the Prereq column.

**TIP** You must click the Submit for Approval button in order for your advisor to see the updates.


Ima Student

go to ...

Search | Plan | Enroll | My Academics

my program | my planner | shopping cart | course history

My Program of Study

Version: 2 1

Status: Approved

Approval History

| Status | Updated By | Date/Time |
|---|---|---|
| New | Ima Student | 04/09/08 11:29:02AM |
| Submitted for Approval | Ima Student | 04/09/08 11:30:18AM |
| Pending Final Approval | Ivan Advisor | 04/09/08 11:31:24AM |
| Approved | John Euclid | 04/09/08 11:32:09AM |

2 REQUEST CHANGES TO MY PROGRAM

Fall 2003

| Course | Description | Prereq | Units |
|---|---|---|---|
| EECS 408 | Intro to Linear Systems | | 3.00 |
| EECS 416 | Convex Optimization in Engr | | 3.00 |
| MATH 461 | Introduction to Topology | yes | 3.00 |

Spring 2004

| Course | Description | Prereq | Units |
|---|---|---|---|
| EECS 413 | Nonlinear Systems I | | 3.00 |
| EECS 600 | Special Topics | | 3.00 |
| MATH 424 | Intro to Real Analysis II | yes | 3.00 |

3

Fall 2004

| Course | Description | Prereq | Units |
|---|---|---|---|
| MATH 400 | Mathematics Teaching Practicum | | 1.00 |
| MATH 401 | Abstract Algebra I | yes | 3.00 |

An Approved PPOS

The Finances area allows you easy access to view your financial information.

**TIP** A guide to financial services at Case is available on the project website: www.case.edu/projects/erp.

1 **Account Inquiry,** view account details, billing statements, or make a payment online.

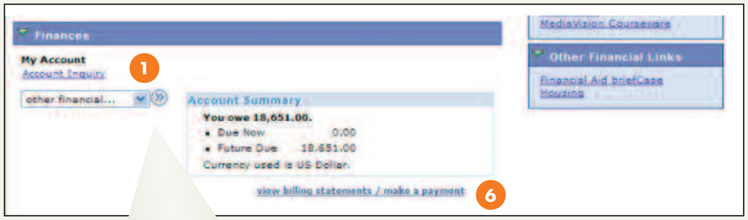
2 **Account Activity,** view up-to-the-minute account activity.

3 **Charges Due,** view past charges, current charges and charges due in the future.

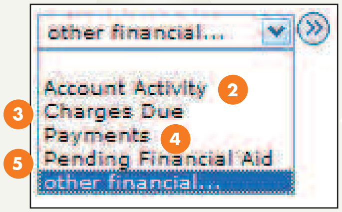
4 **Payments,** view all credits applied to your account.

5 **Pending Aid,** view financial aid that is expected to post to your account. *(Please verify with the Financial Aid Office that all required documents are complete.)*

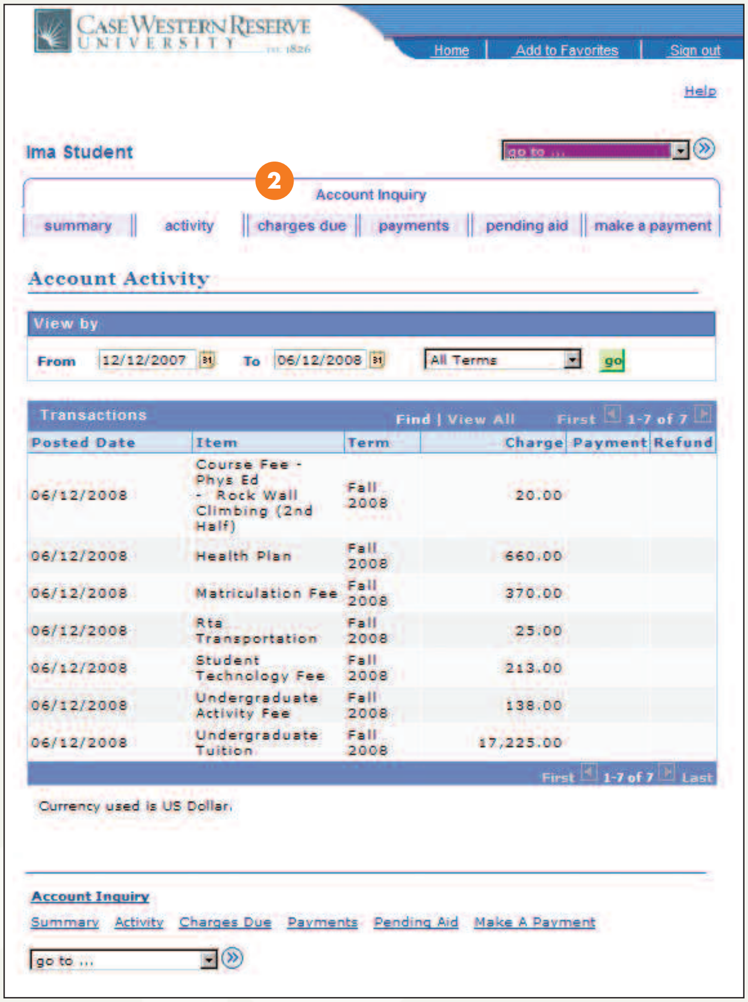
6 **View Billing Statements/Make a payment,** click this link to view statements and make payments to your account.




Finances Section




Other Financial Dropdown List



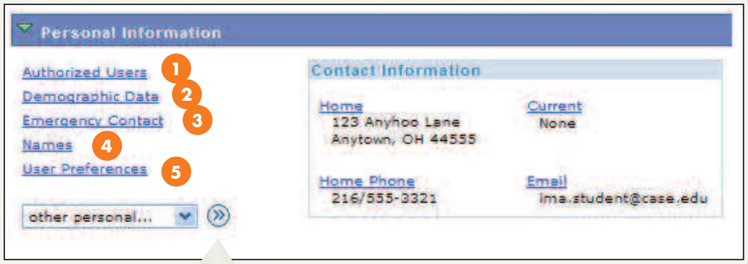

Account Inquiry, Activity Tab

The Personal Information area allows you navigate to screens where you have the ability to make changes to your addresses, phone numbers, privacy settings and more.

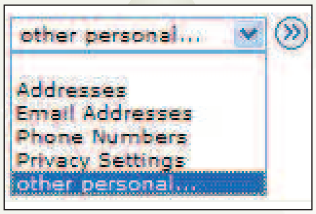
1 **Authorized Users.** Click the Authorized User link to set up an authorized user account for parents, spouses or other third parties who you would like to have access to your student financials and/or class schedules and grades.

2 **Demographic Data.** This area displays a personal data summary.

3 **Emergency Contacts.** Click the Emergency Contact link or emergency contact tab to view, add, or update emergency contacts.




Personal Information Section

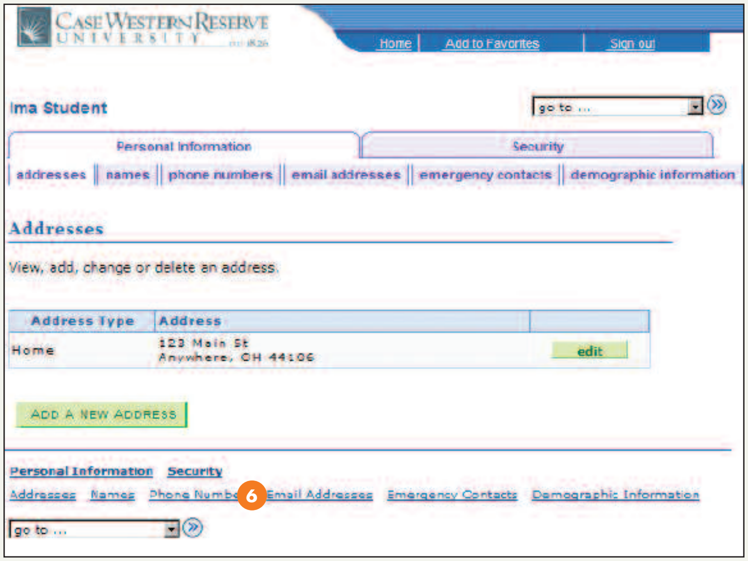



Other Personal Dropdown List

4 **Names.** By clicking on the Names link or names tab you can add a preferred name.

5 **User Preferences.** Set default values to minimize the need for repetitive data entry. Once set, the default values remain associated with your account until changed or deleted.

6 **Addresses, Phone Numbers, Email Addresses.** Using the links in the other personal drop down list, you can update your own information including addresses, phone numbers and a personal email address. Several address and phone number types are available.




Personal Information Tab

| 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 Group | N/A | Academic Group denotes the school that "owns" the course and the school from which the instructors have teaching appointments. For example, ACCT 101 has an academic group of Weatherhead School of Management and MGMT 701 has an academic group of Weatherhead School of Management. |
| 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 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. |

| | | |
|---|---|---|
| Course Career | N/A | To search for courses offered in a given career, select the name of the career from the list provided. To search all careers, leave the field blank. Course Career denotes the academic level of study at which the course is taught. For example, ACCT 101 has a career of Undergraduate (not Management) and MGMT 701 has a career of Graduate (not Management). |
| Course Component | N/A | To search for courses by component type, choose a component type from the list provided. For example, if you wanted to see lab courses, choose "Laboratory" from the list. |
| Enrollment Appointment | Registration Start Date | The date a student may begin to register for classes |
| Planner<br>(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<br>⊘ Negative Service Indicator<br>★ 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 Student 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).

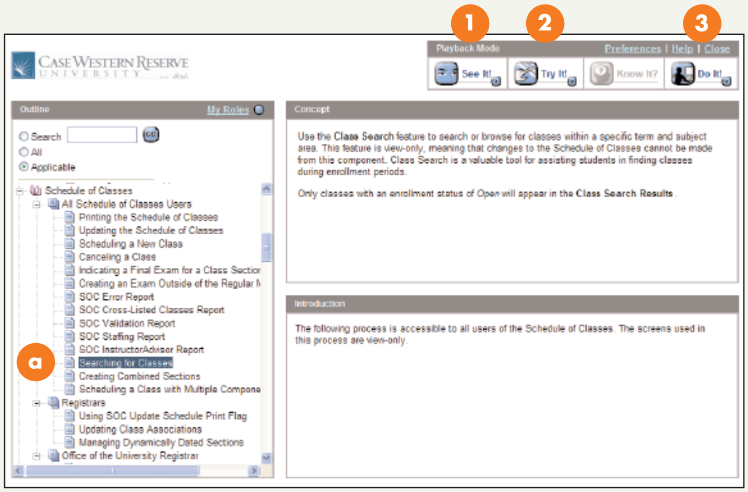
In the upper right-hand corner you will see three options for learning: **See It!**, **Try It!**, and **Do It!** Click on the one you would like to activate.

### 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.

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**TIP** SPOT opens in a new window. Pop-up blockers may interfere with the ability to use this tool.

## 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.

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As always, you can contact the Help Desk 24/7 at 216-368-HELP.

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