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

Detailed definitions of terminology displayed in bold throughout the guide can be found on pages 22 and 23.

**NOTE**

The system is frequently being updated and improved. At the time of this publication, all features and screen shots are current.

An electronic version of this guide and other manuals and guides can be found at www.case.edu/projects/erp/sis
Dear Students,

Welcome to Case Western Reserve University’s Student Information System (SIS).

The SIS is a secure, flexible, and powerful web-based environment for managing and maintaining your academic records. Special features include:

- Web based system that you can access anywhere, anytime
- Easy access to your academic information
- Enrollment shopping cart with validate feature
- 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 account for authorized users (e.g., your parents)

I hope this user guide provides good information about using the SIS. If you have any questions regarding the system, please direct them to the SIS project team listed in the Contact Information section of this guide.

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/sis**

Sign in using your Case Network ID and the associated password.

**TIP**  
User ID and password are case sensitive. The user ID must be entered in lowercase letters (example: abc123).  
Save the URL as a favorite.  
No VPN required.  
Once in the SIS, **do not** use the Internet browser’s Back button—this could cause loss of information.
Sign out.

Sign out of the system 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 60 minutes of inactivity.

**TIP** Always sign out, especially if you are using a public computer.
The Student Center is the main launching point for accessing academic, financial and personal information.

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 the SIS, such as Enrollment, Course History and Grades.

Finances, beneath Academics, enables you to view an account summary. It contains financial links such as Account Inquiry, Account Activity, Charges Due, Payments and Pending Financial Aid. This section also provides a link to view billing information and make an online payment.

Personal Information, directly below Finances, allows you to update personal contact information, Authorized Users, set User Preferences and update Emergency Contact information. For more information on setting up authorized users see the Student Financial Guide at www.case.edu/projects/erp/learning/qrg/stud_fin_guide.pdf.
1 Academic Links. These links allow access to additional functionality of the SIS including grade reports, Advisement Reports and What-If Reports.

2 This Week's Schedule. Displays this week's classes for the current term. Click the Weekly Schedule link to see those classes in a weekly grid.

3 Enrollment Shopping Cart. Use the Shopping Cart to select classes prior to enrollment. Classes can be validated prior to the Enrollment Appointment date.

4 Health Waiver. The CWRU Medical Plan fee is automatically charged on a per semester basis. * Once registered for one or more credit hours a button appears to allow the health insurance fee to be waived. Students that have health coverage are eligible to waive the Medical Plan fee.

5 Finances. View summary account information and link to other detailed account activity.

6 Personal Information. View and update contact information including home and current address, home phone number and e-mail 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. Click the Details link for more information.

9 Enrollment Dates. Displays information on when you can begin to enroll in classes.

10 Advisor. Displays advisor(s) name and contact information. Click the Details link for additional contact options.

11 Links. These links allow access to 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. Select the appropriate **Term** from the Term drop down list.
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. Select the appropriate career for the course you are searching for from the Course Career drop down list.
5. The **Academic Group** field will narrow results to courses in a particular academic group, for example the Schools of Engineering and Management.
6. Limit the results to particular times, days of the week, instructor, and keyword.
7 The **Course Component**, Session, Campus, Building, Course Attributes and Course Lists drop down lists allow further refinement of search results.

8 Click the Search button to see the results.

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**Registration.**

The SIS makes it possible for your registration to go smoothly. Here is a checklist to follow to help avoid potential registration issues:

- From the **Shopping Cart**, search for classes
- Validate **Shopping Cart**
- Obtain class permissions, if necessary
- Enroll on or after **Enrollment Appointment** date.

For more information on the **Enrollment Shopping Cart** please see page 8 of this guide.
The Enrollment Shopping Cart holds the classes selected from the schedule until it is time to enroll.

Students can validate the contents of 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, a choice of Terms will be offered. Select the appropriate Term by clicking in its radio button. Click Continue.
1. Enter the Class Number, if known, to add it to the 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 the Planner. Classes must be present in the Planner to use this feature.

5. This section shows classes that have been added to the Shopping Cart.

6. The Status column shows one of three icons to indicate the status of the class.
   - An Open icon (○) indicates the class is open.
   - A Closed icon (□) indicates the class is closed.
   - A Wait List icon (▲) indicates there is a wait list.

7. Once classes are in the cart, select one (or more) and click validate.

7a. After clicking 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 indicates if the class is OK to add to your schedule, or if a potential problem could prevent registration 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.
Permissions.

The Permission screen enables students to submit permissions requests to instructors. Permission requests apply to those classes that can be added by instructor consent only, are closed due to enrollment capacity, or have a time conflict with another class on a student’s schedule. Permission can also be requested for those classes for which a student hasn’t met the prerequisite requirements.

1 Click on the How to Get Started link for specific directions on using the Permission screen.

2 Use the General Info tab to enter the classes for which permission must be requested.

3 Click on the Permission tab to select the appropriate permit(s) required. Click the Explain Permission Types link for more information.

4 Use the Comments tab to leave a message for the instructor to which the request is being sent.

5 Request permission by clicking the Request Permission(s) button.

6 Click the Explain Permission Status link for more information on the stages of permission requests.
<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent Required</td>
<td>A class may be coded by the department as requiring either instructor or department consent. Consent type required may be either add consent or drop consent. Details regarding whether or not a class requires add or drop consent are available on the searchable schedule of classes.</td>
</tr>
<tr>
<td>Closed Class</td>
<td>Classes that reach their enrollment limits require permission to override the limit. Note: Some classes may have “Reserve Capacities” such that a department may set aside seats for a particular type of student (e.g., juniors, biology majors, etc.) If all non reserved seats are taken, students not meeting Reserve Capacity criteria will not be allowed to register unless Closed Class permission is granted. If all reserved seats are taken, students meeting Reserved Capacity criteria will not be allowed to register unless Closed Class permission is granted. Even if a class shows a status of “open” or it appears as if there are seats available, it still may be closed to students not meeting Reserve Capacity requirements.</td>
</tr>
<tr>
<td>Requisites Not Met</td>
<td>Departments determine whether or not a course requires pre-requisites, co-requisites or other requirement conditions. If the student has not met these requirements, registration for the course is not allowed unless “Requisites Not Met” permission is granted.</td>
</tr>
<tr>
<td>Time Conflict</td>
<td>Students may not register for classes that have any meeting day/time overlaps with each other. Permission may be granted by instructor/department for either course. Even if permission is granted for time conflict, students must still register for course(s) in person.</td>
</tr>
<tr>
<td>Career Restriction</td>
<td>Some schools have restrictions on students such that they may not register for courses outside of their own career without receiving permission from either the student’s registrar or dean or the course career’s registrar or dean. E.g., Law students may not register for Applied Social Science courses without permission from the law school registrar or applied social science school registrar.</td>
</tr>
<tr>
<td>Time Period</td>
<td>If school has separate enrol with permission period (Nursing, Law, Management, SASS,) permission may be granted to allow a student in a class after the regular enrollment period.</td>
</tr>
</tbody>
</table>

**IMPORTANT NOTE**

Requesting and receiving Permission to Add does not automatically enroll a student in the class. Similarly, requesting and receiving Permission to Drop does not automatically drop a student from a class. Once a student receives permission, the student must complete the appropriate registration process to add or drop the course.
Dropping vs. swapping.

**Drop**

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

1. Click the drop tab to see a list of classes that can be dropped.
2. Select the class to drop.
3. Click the Drop Selected Classes button.
4. Confirm the selection and click the Finish Dropping button.

A results screen will appear to show the results of the drop. There are a few reasons why the drop may be unsuccessful:
- It may be outside of the drop/add period.
- Permission may be needed to drop the class.

**NOTE** Please contact your school for policy and procedure on dropping classes for each Term.
Swap allows for dropping and adding classes at the same time. The existing class will be dropped **only if** the target class can be added.

**Swap**

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

1. Click the swap tab to go to the Swap a Class screen.
2. From the drop down list select the class to drop.
3. Choose a class to replace the class being dropped. You can:
   - Perform a class search and select a class from the searchable schedule of classes.
   - Select a class from the Shopping Cart.
   - Enter a **Class Number** (if known).
4. Verify the selection and click the Finish Swapping button.

The status column shows a ✅ which indicates the class swap was successful. An ✖️ would appear with a message indicating why the swap was unsuccessful. If the swap is unsuccessful the existing class is not dropped.
There are a few ways to view courses and grades. Use the Course History screen, Grades screen or Unofficial Transcript to see grades and a list of courses.

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

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

Unofficial Transcript

The cumulative grade report/unofficial transcript is updated at the end of each Term. It shows completed courses, grades received, and statistics per Term.
The SIS allows for real-time access to the same reports advisors can see: the Advisement Report and What-If Report.


**Advisement Report**

The Advisement Report compares completed coursework against requirements that must be fulfilled in order to graduate. It displays completed requirements, requirements to complete, and courses that can be used to complete them.

**Academic Advisement Report**
What-If Report

A **What-If Report** shows how completed courses fit into a new program.

**My Planner***

**My Planner** is an optional feature for the convenience of students who wish to plan ahead. Please note that courses may not actually be offered for the term(s) selected.

*Graduate studies students: Classes cannot be added to **My Planner**, please see pages 18 and 19.
Graduate Student Planned Program of Study (PPOS).

Students in the School of Graduate Studies create a PPOS using the My Program tab 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.

To navigate to My Program choose the Plan link in the Student Center and then choose the My Program tab.

1. Select an Academic Program from the drop down list.

2. The Version drop down list displays the current version of the PPOS by default. Prior versions of the PPOS can also be accessed.

3. PPOS approval status.

4. Approval History.

5. Click here to submit a new PPOS for Approval. The Submit for Approval button requests advisor approval.

6. Variable credit hour courses will have a field in which to enter a credit hour value.

7. Move selected courses into Terms.

**NOTE** For further information about PPOS please contact the School of Graduate Studies.
Requesting Changes to the Official Planned Program of Study

An approved official Planned Program of Study can be viewed on the My Program tab. Changes can be requested to the PPOS 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 The Submit for Approval button must be clicked in order for your advisor to see the updates.
The Finances section allows you easy access to view financial information.

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.

**TIP** A guide to financial services at Case is available on the project website: www.case.edu/projects/erp.
The Personal Information section allows easy access to view and update 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.

4 **Names.** Click on the Names link or Names tab to add a preferred name.

5 **Addresses, Phone Numbers, E-mail Addresses.** Using the links in the other personal drop down list, you can update your own information including addresses, phone numbers, personal email address and privacy settings. Several address and phone number types are available.
<table>
<thead>
<tr>
<th>SIS TERM</th>
<th>ALSO KNOWN AS...</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Career</td>
<td>N/A</td>
<td>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.</td>
</tr>
<tr>
<td>Academic Group</td>
<td>N/A</td>
<td>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.</td>
</tr>
<tr>
<td>Academic Organization</td>
<td>Departments</td>
<td>Colleges, schools, and departments that conduct curricular studies at CWRU. Academic Organizations are responsible for maintaining their class schedules in SIS each term.</td>
</tr>
<tr>
<td>Academic Plan (Plan)</td>
<td>Majors, Minors</td>
<td>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.</td>
</tr>
<tr>
<td>Academic Program (Program)</td>
<td>School or College</td>
<td>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.</td>
</tr>
<tr>
<td>Advisement Report</td>
<td>Degree Progress Report</td>
<td>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.</td>
</tr>
<tr>
<td>Authorized User</td>
<td>N/A</td>
<td>Students can set up Authorized User accounts for parents, spouses or other third parties whom they would like to have access to Academic Information, Financial Information or both.</td>
</tr>
<tr>
<td>Class Number</td>
<td>CRN</td>
<td>Each class offering of a course is assigned a unique four-digit number when created.</td>
</tr>
<tr>
<td>Class Section</td>
<td>N/A</td>
<td>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.</td>
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<tr>
<td>Term</td>
<td>Definition</td>
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<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Course Career</td>
<td>N/A To search for courses offered in a given career, select the name of</td>
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<td></td>
<td>the career from the list provided. To search all careers, leave the field</td>
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<tr>
<td></td>
<td>blank. Course Career denotes the academic level of study at which the</td>
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<td></td>
<td>course is taught. For example, ACCT 101 has a career of Undergraduate</td>
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<td></td>
<td>(not Management) and MGMT 701 has a career of Graduate (not Management).</td>
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<tr>
<td>Course Component</td>
<td>N/A To search for courses by component type, choose a component type</td>
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<td></td>
<td>from the list provided. For example, if you wanted to see lab courses,</td>
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<td></td>
<td>choose “Laboratory” from the list.</td>
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<tr>
<td>Enrollment Appointment</td>
<td>Registration Start Date The date a student may begin to register for</td>
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<tr>
<td></td>
<td>classes</td>
<td></td>
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<tr>
<td>Planner (My Planner)</td>
<td>N/A A self-service tool that enables students to select courses they</td>
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<td></td>
<td>want to take in upcoming semesters from the Course Catalog. For students</td>
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<tr>
<td></td>
<td>in the School of Graduate Studies, the Planner is attached to My Program,</td>
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<tr>
<td></td>
<td>which allows students, advisors, and the School to view, approve, or</td>
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<tr>
<td></td>
<td>deny changes to a student’s Planned Program of Study (POS).</td>
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<tr>
<td>Service Indicators</td>
<td>Holds Also known as Holds on the Student Center screen. Can be positive</td>
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<tr>
<td></td>
<td>or negative. Negative service indicators may prevent students from</td>
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<td></td>
<td>enrolling in upcoming terms. Advising Holds, for example, are negative</td>
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<td></td>
<td>and are applied to students who are required to see an advisor prior to</td>
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<td></td>
<td>registration. Advisors can remove the Advising Hold once they have met</td>
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<td></td>
<td>with a student. This process eliminates the need for PIN numbers.</td>
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<tr>
<td>Shopping Cart</td>
<td>N/A Works with the Schedule of Classes and holds the classes in which a</td>
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<tr>
<td></td>
<td>student wants to enroll before submitting an enrollment request. Students</td>
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<tr>
<td></td>
<td>enroll in classes via their shopping cart once their enrollment appointment</td>
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</tr>
<tr>
<td></td>
<td>(or open enrollment) arrives. Advisors can view their advisees’ Shopping</td>
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<tr>
<td></td>
<td>Carts before enrollment.</td>
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<tr>
<td>Sub-Plan</td>
<td>Tracks, Concentrations A track or concentration that the student is</td>
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<tr>
<td></td>
<td>following within an Academic Plan.</td>
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<tr>
<td>What-If Report</td>
<td>N/A A report that asks, “What if this student were to change majors?”</td>
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<tr>
<td></td>
<td>Compares the student’s current curriculum and benchmark achievements with</td>
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<td></td>
<td>a proposed major and minor combination, and lists the requirements that</td>
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<td></td>
<td>would and would not be satisfied if the student were to make a change.</td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td>Semester The internal name for a semester and year. For example, Fall 2008</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is a term.</td>
<td></td>
</tr>
</tbody>
</table>
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.

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. Find the topic you want to learn more about, and click on it. This highlights the topic name.

2. **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.

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

4. **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.

**TIP** SPOT opens in a new window. Settings for pop-up blockers may need to be adjusted 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.

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