We are here to help!

The goal of the ERP student information system project is to build a secure, flexible, easy to maintain environment for creating and managing academic records.

CaneLink, and therefore, this guide, include some new terminology that will be displayed in bold throughout the guide. A glossary of new terms, their previous equivalents, and detailed definitions are included at the end of the guide.

Note
At the time of publication not all functionality described is available. Please visit the project website, which is available at: http://www6.miami.edu/erpupk/faqs/index.html, for updates.
Dear Colleagues,

Welcome to CaneLink and the new student information system!

As one of the executive sponsors of the Enterprise Resource Planning (ERP) initiative, I am excited for the University of Miami community to experience the new features and functionality inherent in this modern, secure, and flexible environment.

Replacing the University’s aging student information system has been a major endeavor, and the project team has worked countless hours over the past year to make the initial launch a success. I applaud their efforts and hope that you will join me in thanking them for their dedication as we continue on our journey to modernize UM’s administrative systems.

CaneLink will serve as the gateway between the Oracle PeopleSoft Campus Solutions software and the legacy myUM environment, allowing for seamless interaction between the old and new systems.

A few of the highlights include:

- Wait Lists and Prerequisite Checking are automatic
- More complete and up-to-date information about students
- Degree Progress Reports (ACE) are more user-friendly and flexible
- Advisors can run What-If Scenarios for Advisees
- View Class and Advisee rosters with photos and emailing options

If you have any questions about the new system, please do not hesitate to contact the project team (listed in the Contact Information section of this guide). Please refer to the “Contact Information” section located at the end of this guide for details.

THOMAS J. LEBLANC
Executive Sponsor for the ERP Initiative
Executive Vice President and Provost
University of Miami
Sign in is simple and secure.

The URL to access the system is canelink.miami.edu
You can also access CaneLink from the University of Miami
Home page: www.miami.edu.

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

TIP Cane ID and password are case sensitive. Save the URL as a
favorite. Once logged into CaneLink, do not use your internet
browser’s Back button-this could cause you to lose information.

Sign out.

Once logged into CaneLink, you can log out by clicking the Sign
Out link in the upper-right corner of any screen.

IMPORTANT SECURITY FEATURE CaneLink automatically logs you
out after 20 minutes of inactivity.
The **Faculty Center** is the main launching point for both teaching and advising functionality.

**My Schedule** is the first feature you see when you log in to the Faculty Center. From this page, you can view your Class Schedule(s), Exam Schedule, and Class Roster(s).
1. Advisor Center. Access your advisee roster and advising tools through this link.

2. My Teaching Schedule. Located in the middle of the page, you can view classes you are teaching, the days and times, meeting locations, and enrollment totals. You can also link to Class Roster and Grade Roster.

3. Weekly Schedule. Click the View Weekly Teaching Schedule link to see your schedule displayed 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 access a class list, e-mail students, and view student photos.

6. Grade Roster. Click on this icon to review and submit grades online.
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 display the photo of the first student in Class Roster. To see all student photos click the View all link located on the green bar above the picture. 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 All Students button.*

*Emails are sent with the recipients in the BCC field, and the Faculty/Advisor in the TO field.

6 To print the Class Roster, click the Print Student Pictures button and print using your browser’s delivered print functionality.
Grade Roster

Grade Roster enables you and/or your designee(s) to enter grades. (The Grade Roster will not be available until the end of a term and will only be accessible if the designee(s) have the appropriate security/permissions.)

1. Final grades will be entered and submitted in CaneLink. The Approval Status dropdown menu indicates whether 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. When grading students, you have the option of assigning mass grades. For example, you can select all of the students who have earned a grade of B and then select the button entitled, “add this grade to selected students.” You can e-mail all students on the Grade Roster by Clicking the Notify All Students button.*

   *Emails are sent with the recipients in the BCC field, and the Faculty/Advisor in the TO field.

6. To print the Grade Roster, click the Printer Friendly Version button and print using your browser’s delivered print functionality.
Click on Advisor Center from the Faculty Center to access the Advisee Roster – your tool for e-mailing advisees, releasing advising holds, and viewing advisees’ Student Centers. You will only be able to view advisee information if advisees have been assigned to you.

1. Click the Include Photos in List radio button to see photos of advisees. This will display the photo of the first student in my advisees. To see all student photos click the View All link located on the green bar above the picture. To return to my advisees without photos click the Link to Photos radio button.

2. Click View Student Details to access an advisee’s Student Center, where you can access tools like My Planner, Shopping Cart, and the Academic Progress Report.

3. Click Release Advising Hold to permit a student to register for classes using self-service. (PINs are no longer needed for this process.)

4. You can e-mail 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 e-mail all advisees in the Advisee Roster by clicking the Notify All Advisees button.*

*Emails are sent with the recipients in the BCC field, and the Faculty/Advisor in the TO field.
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 to review class choices for the current term prior to enrollment.

2. View an advisee’s Planner prior to enrollment to review class choices for future terms.

3. View an advisee’s class schedule.

4. View Holds on an advisee’s record. Students who are required to see an Advisor before registering for classes will have an ‘Academic Advisement Required’ hold placed on their record. The student will not be allowed to register until this hold is removed.

5. View an advisee’s Enrollment Appointment.

6. View your advisee’s contact information.

7. View Academic Requirements (formerly known as ACE or Degree Audit) of an advisee’s academic requirements.

8. View an advisee’s final exam schedule.

9. View an advisee’s grades.

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

To access options 7-10, select your choice in the other academic drop down box and click >>. (Note: some of these options will become available at a later date.)
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.

Shopping Cart
The Shopping Cart displays the class(es) that a student is considering for the current registration. Students can begin placing classes in their Shopping Cart prior to their advising hold being removed and before their Enrollment Appointment begins. Advisors have access view their advisees’ Shopping Cart but they do not have access to modify the courses in the Shopping Cart.

My Planner
My Planner allows your advisees to select courses that they are considering for future terms (they can also include courses from past term as well). Students are able to organize their desired courses by semester as they discuss with their advisors which courses best fit into satisfying their academic goals. (This tool is also helpful for curriculum planner when deciding on the demand for courses.)
<table>
<thead>
<tr>
<th>CaneLink Term</th>
<th>Previously 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 five categories: Undergraduate, Graduate, Law, Medicine, and Non-degree.</td>
</tr>
<tr>
<td>Academic Group</td>
<td>N/A</td>
<td>Academic Group denotes the school that &quot;owns&quot; the course and the school from which the instructors have teaching appointments.</td>
</tr>
<tr>
<td>Academic Organization</td>
<td>Departments</td>
<td>Colleges, schools, and departments that conduct curricular studies at the University of Miami. Academic Organizations are responsible for maintaining their class schedules in each term.</td>
</tr>
<tr>
<td>Academic Plan (Plan)</td>
<td>Majors, Minors</td>
<td>The method by which students pursue their studies. For students, majors, minors, and cognates are Academic Plans.</td>
</tr>
<tr>
<td>Academic Program (Program)</td>
<td>School or College</td>
<td>The school to which a student is admitted and/or from which he or she graduates.</td>
</tr>
<tr>
<td>Class Components</td>
<td>N/A</td>
<td>The primary format of a class or class section; for example, lecture, lab, dissertation, seminar, clinical.</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.</td>
</tr>
<tr>
<td>Degree Progress Report</td>
<td>ACE/Degree Audit</td>
<td>Compares the classes and benchmarks that a student has achieved towards fulfilling graduation requirements. Degree Progress 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>CaneLink Term</td>
<td>Previously known as...</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enrollment Appointment</td>
<td>Registration Start Date</td>
<td>The date a student may begin to register for classes.</td>
</tr>
<tr>
<td>Planner (My Planner)</td>
<td>N/A</td>
<td>A self-service tool that enables students to select courses that meet their academic/degree goals. The Planner can assist with determining which courses will form the content of their degree requirements.</td>
</tr>
<tr>
<td>Service Indicators/Holds</td>
<td>Stops</td>
<td>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, categorized as Negative Service Indicators 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.</td>
</tr>
<tr>
<td>Negative Service Indicator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Positive Service Indicator</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>What-If Report</td>
<td>Degree/Major Exploration</td>
<td>A report that asks, “What if this student wants to change majors, minors, or cognates?” Compares the student’s current curriculum and benchmark achievements with a proposed major, minor and cognate combination, and lists the requirements that would and would not be satisfied if the student wants to make a change.</td>
</tr>
<tr>
<td>Term</td>
<td>Semester</td>
<td>The designation for a semester and year. For example, Fall 2013 is a term.</td>
</tr>
</tbody>
</table>
Contact Us

**ERP Campus Solutions Project Team**
ERPProject@miami.edu

Use this address to direct general questions about CaneLink to the Project Team.

**UMIT Service Desk**
ITSupportCenter@miami.edu

Use this address to direct questions about access to CaneLink and other system-related questions.

As always, you can contact the UMIT Service Desk at 305-284-6565 (Gables) or 305-243-5999 (Medical)

Department of Information Technology, 1320 S. Dixie Highway, Suite 1100, Coral Gables, Florida 33124
http://www.miami.edu/it