Academic Information Systems
Adviser Access to MyUCSC Lab Workbook

7/6/08
Version 2.0
Adviser Access to MyUCSC

A portal is a website where users may logon with an ID and password. The logon is an authentication process that allows delivery of content specific information to a targeted audience. Common commercial portals include sites such as Yahoo!, Amazon, et cetera.

Adviser access to AIS through MyUCSC will organize and provide common information (components in PeopleSoft) to help increase adviser efficiency and reduce repetitive stress injury that may come from PeopleSoft breadcrumb navigation.

For MyUCSC, “advisers” are defined as people having an Advising Role in AIS. This advising community includes College, Department and Student Affairs advisers as well as advisers in Undergraduate Admissions and the Office of the Registrar.

This training manual documents the process by which a user logs on to MyUCSC, describes the organizational structure of adviser access to My UCSC, and informs users of the features of MyUCSC.

If you have questions please email Tchad Sanger (cpsanger@ucsc.edu)
Table of Contents

MODULE 1: PORTAL OVERVIEW AND ORGANIZATION ................................................................. 1
   Lesson 1: Login to MyUCSC .......................................................................................... 1
   Lesson 2: Navigating MyUCSC .................................................................................. 2
   Lesson 3: Managing Content ..................................................................................... 7
   Lesson 4: Customizing Pages ..................................................................................... 9
   Frequently Asked Questions ...................................................................................... 11
Module 1: Portal Overview and Organization

Objectives:
- Login to MyUCSC
- Navigate MyUCSC for Advisers
- Managing Content
- Customizing Pages

Lesson 1: Login to MyUCSC

Login to [http://my.ucsc.edu](http://my.ucsc.edu) with your User ID and Password.

1. Enter User ID.
   - Press Tab Key to go to the next field.

2. Enter Password.
   - Press Enter Key to login to MyUCSC, the adviser view opens.

Notes:

Question and Answer Session
Lesson 2: Navigating MyUCSC

MyUCSC is organized in three sections: the Header, the Menu and the Target Window. From the Home Page several Pagelets appear for the user (see Lesson 3: Managing Content). Selecting Content References (links) in the Menu or the Header will display information in the Target Window, be it an AIS page or external website.

Header

The Header contains links to several useful features to navigate or customize content in MyUCSC.

1. UCSC Home
   *UCSC’s Website.*

2. UCSC A-Z Index
   *Navigates the user to UCSC’s A-Z Index of Departments.*

3. Search UCSC.edu:
Searches UCSC's Website.

4. MyUCSC Home
   Navigates the user to MyUCSC home.

5. CruzMail
   Opens a CruzMail window.

6. Campus Directory
   Opens the UCSC Directory Search window.

7. Add Link
   Adds an AIS page to MyLinks
   a. Navigate to New/Drop-In Advising using Menu or One-Click Advising.
   b. Click on Add to Links.
   c. Click Save.

8. Help
   Navigates the user to ITS Help.

9. Customize Interface: Content | Layout
   Allows the user to customize MyUCSC Home

10. My Links and Drop-Down Window

Exercise:
   a. Navigate via drop-down window.
   b. Edit My Links
      i. Click on My Links
      ii. Click on Edit My Links
      iii. Add Link
         1. By URL Address
            Registrar
            http://reg.ucsc.edu
            Save
2. By Menu Item
   Click Look Up
   Open Curriculum
   Open Schedule of Classes
   Click on All Class Rosters
   Select Open in a New Window
   Save
   Click on All Class Rosters
   Click on Edit Link
   Change Name to Class Rosters
   Save

iv. Add Folder
    Student Records
    Save

v. Add Folder
   Curriculum
   Save

vi. Move New/Drop-in Advisees
    Click on New/Drop-in Advisees
    Click on Edit Link
    Change folder to Student Records
    Save

vii. Apply what you learned!
     Move Class Rosters to Curriculum

viii. Add Other
      Select Menu Folder
      Click on Look Up Icon
      Select Student Records
      Click Save

11. Sign out
    Signs the user out of the Portal and AIS.

Menu

The Menu contains Folders and Content References (links to AIS pages or external websites). The Menu has three folders: Student Records, Curriculum, Adviser Tools and Links. The Menu also contains a Content Reference to AIS, Emergency Management, the Campus Calendar, Accessibility, and Change My Password.
The folder structure of the Menu

1. Student Records (mirrored in One-Click Academic Advising) contain the following folders (f) and components (c):
   a. Self-Service (f)
      i. New/Drop-In Advisees (c)
      ii. View Advisees’ Information (c)
   b. Comments (f)
      i. Person Comment Entry (c)
      ii. Person Comment Summary (c)
      iii. Person Checklist Summary (c)
   c. Academics (f)
      i. Enrollment Summary (c)
      ii. Student Grades (c)
      iii. Enrollment Request (c)
      iv. Enrollment Request Search (c)
      v. Term Activation (c)
      vi. Appointments (c)
      vii. Term History (c)
      viii. Student Milestones (c)
      ix. Service Indicators (c)
      x. Student Exceptions (c)
      xi. Transcript Request (c)
   d. Career/Program/Plan (f)
2. Curriculum (mirrored in One-Click Curriculum) contain the following folders (f) and components (c):

   a. Catalog (f)
      i. Course Catalog Detail (c)
         UCSC search by active or inactive courses.
      ii. Course Catalog (c)
         Vanilla PeopleSoft search of all courses.

   b. Schedule of Classes (f)
      i. Class Search (c)
      ii. Schedule of Classes (c)
         Vanilla PeopleSoft search, including suppressed call numbers.
      iii. All Class Roster (c)
      iv. Grade Roster (c)
3. Adviser Tools and Links contain useful websites for advisers.

4. AIS – Opens an AIS session.

### Lesson 3: Managing Content

Users have the ability to manage pagelet content on MyUCSC.

**Customize Content**

Customize Content by checking or un-checking pagelets
1. Check pagelet box
2. Click Save

**Customize Page**

It is possible to customize the tab order of pages one frequently navigates to.

1. Navigate to Term Activation.
2. Click on Enrollment Limits.
3. Click on Customize Page.
Lesson 4: Customizing Pages

Users have the ability to customize tab order and View All status in AIS pages.

Customize Tab Order

Navigate to page and select the appropriate tab.

1. Click on Customize Page.
2. Select checkbox next to “Put this page in front (the current tab) when I come into this component.”
3. Click OK.
Customize View All

Navigate to page and select View All.

1. Click on Customize Page.

2. Select checkbox next to “Safe the state of the View All settings on this page.”

3. Click OK.

Question and Answer Session
Frequently Asked Questions

Q. What browser should I use?
A. PC users should access MyUCSC with Internet Explorer, Firefox or Mozilla. Macintosh users should access MyUCSC with Mozilla, Firefox or Netscape.

Q. What is my User ID and password?
A. Your User ID and password is the same as it is for AIS. If you have questions or problems with your User ID, please contact AIS Help at ais-help@ucsc.edu.

Q. I'm having trouble logging in to MyUCSC. What should I do?
A. Re-enter User ID and Password. If error persists, contact the AIS Help Desk (https://pisa.ucsc.edu/prd/t_b621/index.php).

Q. The portal logs me out quickly and then will not let me back in and informs me there is a system error. What is going on?
A. The portal has a twenty-minute time out. After 20 minutes of inactivity, it sends information to your browser to shut down all sessions of AIS. This time-out can be increased to 90 minutes by navigating to an AIS content reference (not an AIS session). If you open a non-AIS page from the portal by clicking on a link, it sets a 20-minute logout timer on the page, even though it may not have the portal appearance. Be sure to close any pages you are not using. If you encounter this problem, close your browser, clear your cache and cookies.

Q. How do I access other pages or components in AIS?
A. Click on the “AIS” Content Reference (link). This should open an AIS session in a new window.

Q. How do I manage “My Links”?
A. Clicking Add to My Links after navigating to the page will add the page to My Links. Clicking on the My Links pull-down menu and selecting Add to My Links will also add the page to My Links. To edit My Links, select Edit My Links from the pull-down menu.