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Module 1: AIS Overview

Online Training Instructions

To complete the Intro to AIS online training, please review the information in this Intro to AIS training workbook. Once you've familiarized yourself with AIS policies and procedures, then take the Intro to AIS quiz at: http://reg.ucsc.edu/staff/ais_info/intro_to_ais_quiz.swf

Please note that you will not be able to complete the training exercises in this workbook until after you've received your AIS account access. However, once you've completed the Intro to AIS quiz, submitted your account forms to the ITS Support Center, and received your AIS login and password, please revisit this workbook to try out some of the exercises.

If you have questions about obtaining your AIS account, please visit: http://its.ucsc.edu/ais/help/staff.

Academic Information System at a Glance

AIS is the system of record supporting academic advising, undergraduate and graduate admissions, financial aid, student records, and the student, faculty and advising portal.

AIS uses the Oracle Campus Solutions suite of software and is accessible using the internet on both Macintosh and PC computers. UCSC staff members in departments, colleges and central offices use AIS to access student information. Students, faculty and advisers access the information in AIS via the MyUCSC portal at https://my.ucsc.edu, while other staff log in through the Campus Solutions log in page at https://ais-cs.ucsc.edu.

Prerequisites

This workbook is based on the following assumptions:

- User has solid understanding of computers
- User is familiar with the Internet
- User has signed and turned in the Access to Information disclaimer
- User is utilizing a web browser that is supported for use with AIS/MyUCSC (please review the list of supported browsers).
Course Objectives

- Log in
- Navigate menu structure
- Perform searches
- Retrieve information
- View Bio/Demographic Data
- Identify FERPA indicators
- Identify positive service indicators
- Identify negative service indicators
- Change password
- Set password hint question
- Log out
Module 2: Logging In

- Before logging in, ensure that one of the supported browsers is installed.
- Type the URL to access AIS
  URL: https://ais-cs.ucsc.edu
- Enter the user ID and password in the fields on the log in screen.
- Press the Enter key or click Sign In.

The Home page with the Menu Groups displays.

Remember: Passwords are case sensitive.
Module 3: Navigating the Menu Structure

The Home Page

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search Icon" /></td>
<td>Search</td>
<td>Runs the search for terms entered in the search field.</td>
</tr>
<tr>
<td><img src="image" alt="Minimize Icon" /></td>
<td>Minimize</td>
<td>Minimizes the menu to provide more space on the visible page.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Icon" /></td>
<td>Refresh</td>
<td>Refreshes the menu if a change has been made (generally you will not need to do this).</td>
</tr>
<tr>
<td><img src="image" alt="Close Icon" /></td>
<td>Close</td>
<td>Closes the menu (generally you would not want to do this).</td>
</tr>
<tr>
<td><img src="image" alt="Expand Icon" /></td>
<td>Expand</td>
<td>Indicates additional information is available by clicking the link.</td>
</tr>
<tr>
<td><img src="image" alt="Contract Icon" /></td>
<td>Contract</td>
<td>Contracts the information displayed to minimize menu display.</td>
</tr>
<tr>
<td><img src="image" alt="FERPA Icon" /></td>
<td>FERPA</td>
<td>The FERPA service indicator indicates that a student has enacted his/her right to privacy. No information can be given out about this student.</td>
</tr>
<tr>
<td><img src="image" alt="Positive SI Icon" /></td>
<td>Positive SI</td>
<td>Indicates that this student has a positive service indicator.</td>
</tr>
<tr>
<td><img src="image" alt="Negative SI Icon" /></td>
<td>Negative SI</td>
<td>Indicates that this student has a negative service indicator.</td>
</tr>
<tr>
<td><img src="image" alt="Information Icon" /></td>
<td>Information</td>
<td>Takes user to the Student Advising Summary information page.</td>
</tr>
</tbody>
</table>
Lesson 1: Navigating the Menu Structure

Menu groups represent functional categories. Within each menu group are specific menus. These menus contain components that represent the pertinent functions that are available in the system. The components offer a view into the data. The components can be searched in order to locate specific information about a student.

1. Click Campus Community.  
   The Campus Community Menu opens.

2. Click Add/Update a Person.  
   The Add/Update a Person page displays.
Module 4: Searching

Objectives:
- Searching
- Retrieving Results
- Viewing Records

Lesson 2: Searching

AIS allows users to search by first and last name, ID and social security number (National ID). A search can return a maximum of 300 results; 100 results are displayed per page.

1. Click Campus Community.
   The Campus Community Menu opens displaying the CC Components.

2. Click Add/Update a Person.
   The Add/Update a Person page displays.

3. Enter Smith in the Last Name field.

4. Click Enter or Search.

Find an Existing Value

ID: begins with
Campus ID: begins with
National ID: begins with
Last Name: begins with
First Name: begins with

[Search] [Clear] [Basic Search] [Save Search Criteria]
Lesson 3: Narrowing Search Results

1. Scroll back up to the search fields.
2. Enter the initial D in the First Name field.
3. Click Enter or Search.

NOTE: You can use different search options to help with a search: “Begins with” is the default, but other options may help you narrow your search.
Lesson 4: Retrieving Results

1. Scroll back up to the search fields.
2. Enter your name in the Last and First Name fields.
3. Click Enter or Search. Results for the name you entered will display. If there is more than one entry with a similar name, the results will display for you to select one. If there is only one entry for the name you entered, the system will automatically open the Bio/Demo info page for that name.
4. Click the ID number for your name. The Bio/Demo info page opens.
Lesson 5: Viewing Bio/Demo Data

Scroll through the Bio/Demo page to view the available information. The Bio/Demo page provides a summary of basic student information, including classes, billing amounts, dues, and contact information.
Module 5: Service Indicators

Objectives:
- Identifying Service Indicators
  - FERPA
  - Positive
  - Negative

Lesson 6: Identifying Service Indicators

Service Indicators are used to provide or limit access to services for an individual in the system. Positive service indicators may be used to communicate that special services or privileges should be provided to a student. Negative service indicators might prevent a student from enrolling in classes or from cashing a check. The system has three types of indicators to look for: Positive, Negative and FERPA.

1. Click Campus Community.  
   The Campus Community Menu opens.
2. Click Add/Update a Person.  
   The Add/Update a Person search displays.
3. Search for a student  
   The Bio/Demo page opens for that student, displaying a service indicator if there is one.

FERPA Indicators

Click to view more information about the FERPA indicator.  
The service indicator page opens, displaying the FERPA indicator information.
NOTE: If a student elects a non-release of information under FERPA, no information about this student can be given out to individuals outside of UCSC. For more information about FERPA, visit: http://reg.ucsc.edu/guidelines_qr.htm

Positive Service Indicators

Click 🌟 to view more information about the Positive Service indicator.
The indicator page opens, displaying the Positive Service indicator information.

Negative Service Indicators

Click 🅿️ to view more information about the Negative Service indicator.
The indicator page opens, displaying the Negative Service indicator information.
Module 6: Changing Your Password

Objectives:
- Changing Your Password
- Setting up Password Hint Question

Lesson 7: Changing Your Password

Password resets are the number one request to the ITS Support Center. They account for 70% of all AIS help requests. Changing your password to a secure one you can remember will help reduce calls to the Support Center.

1. Click Change My Password (in the main menu).
   The Password Maintenance page opens, displaying two options, Change password and Change or set up forgotten password help.

2. Click Change password.
   The Change password page opens.

3. Enter your current password.

4. Enter your new password twice.
   Remember, passwords must be at least 8 characters long and contain both numbers and letters. They are case sensitive.

5. Click OK.
   Your new password is set. Remember to save it.

6. Click Save.
   Your new password is saved. Use it the next time you log into AIS.

Note: Remember passwords must be at least 8 characters long and contain both numbers and letters. They are case sensitive.
Lesson 8: Set Password Hint Question

If you do forget your password, setting the password hint question will allow you to receive a reset password in your cruzmail account immediately, rather than having to contact the ITS Support Center for them to reset for you during business hours.

1. Click Change My Password (in the main menu).
   The Password Maintenance page opens, displaying two options, Change password and Change or set up forgotten password help.

2. Click Change or set up forgotten password help.
   The Change or set up forgotten password help page opens.

3. Select a question

4. Enter the response (that only you would know).

5. Click OK.
   Your hint is set. Remember to save it.

6. Click Save.
   Your password hint is saved, use it the next if you forget your AIS password. The reset password will be sent to your Cruzmail account.
Module 7: Identifying Terms

Lesson 9: Identifying Terms

The terms (quarters) at UCSC are defined numerically in the AIS database. This numerical representation can be confusing, if you don’t know what the numbers reference.

For example, the term code 2090 represents Winter Quarter 2009.
Module 8: Signing Out

Lesson 10: Signing Out

If you are inactive in the system for 90 minutes it will time you out. Inactive means that even if you are entering data, if you don’t click Save or Update, you may get timed out and lose your work.

When leaving your computer for an extended period of time it is a good idea to log out, so data is safe from other users.

1. Click **Sign Out**.
   
   The application closes and the log in page displays.

Training Complete!

Now that you’ve reviewed the training workbook, please take the Intro to AIS training quiz at: [http://reg.ucsc.edu/staff/ais_info/intro_to_ais_quiz.swf](http://reg.ucsc.edu/staff/ais_info/intro_to_ais_quiz.swf)

Once you’ve completed the quiz, submit your account forms to the ITS Support Center (if you haven’t already) in order to receive your AIS login and password. Once you have your AIS login and password, please revisit this workbook to try out some of the exercises.

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