

# Personalizing AIS Data Entry Defaults

## Reference

Audience: Academic Advisors

## Summary

AIS provides standard default values for different search pages and data entry pages. Individual users can change those defaults to their own preferences. "These changes apply only to the person who makes them and do not affect anyone else."

## Originator

Advising Systems, Office of the Registrar

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## Introduction

Your AIS access came with certain default values for data input pages; these are values that automatically appear in certain fields. However, you can modify or add to these defaults so that values that you *always* type in will be filled in for you.

For example, if you are the adviser for the ARTBA academic plan, you can make ARTBA appear by default in any field asks for a plan code. You can still override default values if you ever need to; and the changes apply only to your AIS user ID. They affect no other user.

User defaults can save time and minimize data entry errors; however, user defaults are entirely optional. Fields with an asterisk are recommended settings.

## Access

To access the User Defaults page, use one of these paths:

- *Your Homepage > AIS Staff Tools tile > User Defaults*
- *NavBar/Navigator Button > Set Up SACR > User Defaults*

## Changing Default Values

Add or change user default values on tabs 1 through 4. Each field whose default can be changed on each tab is described below. Do not establish defaults for fields that are not on the lists.

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
User ID: 0247798 Name: Pipes, Jude E				
Academic Institution:	<input type="text" value="UCSCM"/>			UC Santa Cruz
Career Group SetID:	<input type="text"/>			
Facility Group SetID:	<input type="text"/>			
Academic Career:	<input type="text"/>			
Academic Group:	<input type="text" value="GEN"/>			General UCSC
Subject Area:	<input type="text"/>			
Term:	<input type="text"/>			
Academic Program:	<input type="text"/>			
Academic Plan:	<input type="text" value="ARTBA"/>			Art BA
Academic Sub-Plan:	<input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Notify"/>				

### User Defaults 1 Tab

The following fields are suitable for default values. Fields marked with an asterisk are recommended settings.

- Academic Institution\*: UCSCM
- Career Group\*: UCSCM
- Facility Group\*: UCSCM
- Academic Career: (You can choose an academic career default if you are primarily working within one career, e.g., you are working only with undergraduate or graduate students. If you need to see another career, you can overwrite the default value.)
- Academic Group\*: GEN
- Subject Area: (choose a subject area default, e.g., HAVC- must select an Academic Career)
- Term: (choose a term default - must select an Academic Career.)
- Academic Program: (how a student was admitted - must select an Academic Career.)
- Academic Plan: (choose a default academic plan - major)
- Academic Sub-Plan: (choose a default academic sub-plan- formerly major - must select an Academic Plan)

### User Defaults 2 Tab

The following fields are suitable for default values:

- SetID: UCSCM
- Business Unit: UCSCM
- Campus: MAIN
- Institution Set: UCSCM

### User Default 3 Tab

Do not add default values on this tab.

### User Default 4

The following fields are suitable for default values:

- Carry ID: checked
- Output Destination: Page
- Transcript Type: adviser choice

## Saving Your Changes

When you've finished adding or changing your defaults, click the Save button.

## Frequently Asked Questions

**Q.** When I perform a Look Up on Transcript type when setting up my User Defaults, I don't see any values. Why is that?

**A.** You may not have appropriate Row Level Security set up. Please email [advsys@ucsc.edu](mailto:advsys@ucsc.edu).

**Q.** I am trying to set up an Academic Sub-Plan. When I click on the Look Up button and execute the Look Up, the system tells me there are "No matching values." Why?

**A.** Many fields in AIS require entry in one or many other fields to have a matching value. This is a data integrity feature in AIS. Relating fields means a user is not able to put the European History Concentration (SubPlan) with the Graduate History PhD (Plan) with the Undergraduate Second BA Program (Program) and Graduate Career (Career). To get matching values at the SubPlan level, you need Career, Program and Plan values entered.