My Messages
Portal Messaging Training for Campus Solutions 9.0

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Version 2
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Module 1: Overview

Online Training Instructions

To complete the My Messages online training, please review the information in this training workbook. Once you have familiarized yourself with the policies and procedures, you will take the My Messages quiz online.

Please note that you will not be able to complete the training exercises in this workbook until you have received My Messages access. However, once you have completed the My Messages quiz and received notification that your My Messages access has been established, please revisit this workbook to try out some of the exercises.

If you have questions about obtaining access to My Messages, open an IT Request ticket by logging in at itrequest.ucsc.edu or emailing help@ucsc.edu.

Portal Messaging at a Glance

Portal Messaging allows AIS users to post targeted, one-way official communications to students’ MyUCSC portal. Faculty can post messages to students in a specific class or to all of their students. Staff can reach students based on specific needs (for example all financial aid students). The messages are text only and include two URL spaces for hyperlinks.

Clicking View Messages takes the student to this screen:
Prerequisites

This workbook is based on the following assumptions:

- User has solid understanding of computers
- User is familiar with the internet
- User has staff access to AIS Campus Solutions 9.0 (please visit http://its.ucsc.edu/ais/help/staff if you would like to request access to AIS)
- User is using a web browser that is supported for use with AIS/MyUCSC (please review the list of supported browsers).

Course Objectives

- Logging In
- Reviewing Policy
- Posting List Messages
- Posting Messages Using Uploaded UCSC IDs
- Posting to Class Rosters
- Posting by Instructor
- Retracting Messages
- Viewing Message Recipients
- Other Features
- Logging out
Module 2: Logging In and Navigating to UCSC Messaging

1. Open one of the supported browsers.
2. Type the URL to access MyUCSC: https://my.ucsc.edu

   OR

3. Type the URL to access AIS: https://ais.cs.ucsc.edu
4. Enter the User ID and password in the fields on the Log In screen.

5. Press the Enter key or click Sign In.

   The Home page with the Menu Groups displays.

6. If you logged into MyUCSC, choose UCSC Messaging from the main menu.
7. If you logged into AIS, choose Campus Community from the main menu, then UCSC Messaging.

Remember: Passwords are case sensitive.
Module 3: Reviewing Portal Messaging Policy

The MyUCSC Home Page

Portal Messaging
Portal Messaging is for use by academic departments, faculty and transactional office staff to communicate messages to students. Messages are targeted, one-way communications that convey information related to the business of UCSC. All messages should have an expiration date.
Module 4: Posting Messages

Lessons

- Posting List Messages
- Posting Messages with Uploaded Lists
- Posting Messages by Class Roster
- Posting Messages by Instructor
- Retracting Messages
- Viewing Message Recipients

Lesson 1: Posting List Messages

There are four methods by which users can post messages using Portal Messaging: by entering a list of users; by uploading a list of users; by selecting a class roster; and by selecting an instructor. Not all users have the ability to post messages using all four methods.

1. Click UCSC Messaging.
   The UCSC Messaging options display.

2. Click Send Message.
   The UCSC Messaging: Message Detail frame opens. The default message type is List.

3. Notice the Date/Time.
   Date/Time displays the date and time the message will be marked as sent.

4. Fields with an asterisk * are required.
5. Notice the **From** field.

   The From: field is mandatory, and only some users have the ability to change the name in this field.

6. Enter a list of Student IDs in the **To**: field. IDs must be separated by a comma, and do not need a space between them.

7. Enter a **Subject** line. This can be up to 30 characters long.

8. Enter the **Message Text**.

9. Enter a **URL** in one of the two URL fields if you want the message to contain a clickable hyperlink.

10. Click [ ] and select an **Expiration Date** for the message.

    Expired messages will be deleted from students' portal.

11. Click [Post].

    The message is delivered to the recipients’ MyUCSC portal. The Send Confirmation page displays, with a link to Return to UCSC Messaging.

**NOTE:** The To: line can only hold 100 characters, including spaces and commas. The maximum number of IDs this field can hold is 12. Do not put a space between IDs. Do not place a W before student IDs.

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**Lesson 2: Posting Messages Using Uploaded Lists**

A text file of IDs can be uploaded into the system. This file can be generated using Cognos reports. It can be saved from Excel or Word as a .txt file and should have each ID on a new line.

**Mac Users:** When saving an Excel file as .txt, make sure it is saved as Text (Windows). When saving a Word doc as .txt, save as Text Only (MS-Dos).

**PC Users:** When saving an Excel file as .txt, make sure it is saved as Text (MS_DOS). When saving a Word document as text, save it as Plain Text.

1. Click **UCSC Messaging**.

    The UCSC Messaging options display.

2. Click **Send Message**.

    The UCSC Messaging: Message Detail frame opens. The default message type is List.
3. Select the **Upload UCSC IDs** message type.  
   *The page refreshes and the Upload button displays.*

4. Fields with an asterisk * are required.

5. Notice the **Date/Time**.  
   *Date/Time displays the date and time the message will be marked as sent.*

6. Click **Upload**.  
   *The Upload file page opens.*

7. Click **Browse...** to search for your file.  
   *The Choose File window opens.*

8. Click **Upload**.  
   *The page refreshed and displays the Message Detail page.*

9. Enter Subject, Message Text, URL(s) and Expiration Date.

10. Click **Post**.  
    *The message is delivered to the recipients’ portal. The Send Confirmation page displays, with a link to Return to UCSC Messaging.*

### Lesson 3: Posting Messages by Class Roster

Faculty and staff may want to target students in a specific class. This can be done by sending messages based on a specific class roster.
1. Click UCSC Messaging.
   The UCSC Messaging options display.

2. Click Send Message.
   The UCSC Messaging: Message Detail frame opens. The default message type is List.

3. Select the Class Roster message type.
   The page refreshes and displays the Class Roster search fields.

4. Fields with an asterisk * are required.

5. Notice the Date/Time.
   Date/Time displays the date and time the message will be marked as sent.

6. Enter the term code (e.g., 2068) and class number.
   Use the search feature if you do not know the class number. For more information on searching, see Lesson 7 on page 13.

7. Click Populate.
   The class attendees populate the Class Roster field. To display more than one student click View 100. If the class has more than 100 students, page through the list of students with the previous/next options.
8. Check the box by each student’s name in order to select them for the message. If you would like to send to all students in the class, click **Select All**. The page refreshes, a check appears for each student in the class.

9. Enter Subject, Message Text, URL(s) and Expiration Date.

10. Click **Post**. The message is delivered to the recipients’ portal. The Send Confirmation page displays, with a link to *Return to UCSC Messaging*.

**NOTE**: Faculty using the Class Roster message type will only be able to select rosters for classes they teach.

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## Lesson 4: Posting Messages Based on Instructor

Posting messages based on instructor allow messages to be delivered to all of the students in classes a specific faculty member is teaching.

1. Click **UCSC Messaging**. The UCSC Messaging options display.

2. Click **Send Message**. The UCSC Messaging: Message Detail frame opens. The default message type is List.

3. Select the **By Instructor** message type. The page refreshes and displays the By Instructor search fields.
4. Fields with an asterisk * are required.

5. Notice the **Date/Time**.
   *Date/Time displays the date and time the message will be marked as sent.*

6. Enter the **Instructor ID**. If you do not know it, click to search for the faculty member by first and last name.

7. Enter the term code (e.g., 2078).

8. Click **Populate**.
   *A list of all students for that instructor for that term displays. To view all students, click View All.*

9. Enter **Subject**, **Message Text**, **URL(s)** and **Expiration Date**.

10. Click **Post**.
    *The message is delivered to the recipients’ portal. The Send Confirmation page displays, with a link to Return to UCSC Messaging.*

**NOTE**: Faculty using the By Instructor message type will only be able to enter their own ID.
Lesson 5: Retracting Messages

After posting a message to students’ portal, it can be retracted. If you have just clicked Send, click Return to UCSC Messaging and click Retract. Messages can also be retracted at a later date. However, they cannot be retract from students who have already read the message.

1. Click UCSC Messaging.  
   The UCSC Messaging options display.
2. Click Send Message.  
   The UCSC Messaging: Message Detail frame opens. The default message type is List.
3. Click Update/Display.  
   The Send/Unsend Messages search page opens.
4. Enter specific search criteria, or just click Search to bring back all the messages you have sent.  
   The Search Results display at the bottom of the page.

<table>
<thead>
<tr>
<th>Date/Time Created</th>
<th>From User</th>
<th>Subject</th>
<th>Message Status</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/14/2006 2:00:48.000000000</td>
<td>willis</td>
<td>Happy Nicole</td>
<td>Sent</td>
<td>08/23/2006</td>
</tr>
</tbody>
</table>

5. Select the message to be retracted.  
   The message detail page opens.
6. Click Retract.  
   The unsend confirmation displays.

NOTE: If a student has already read a message, it cannot be retracted for that recipient.

Lesson 6: Viewing Message Recipients

To see who a message was delivered to, or who has viewed the message, check the message recipients.

1. Click UCSC Messaging.  
   The UCSC Messaging options display.
2. Click View Message Recipients.  
   The View Message Recipients search page opens.
3. Enter specific search criteria or click **Search** to view all messages sent. 
   The Search Results display at the bottom of the page.

4. Select the message to view recipients.
   The Message Recipients page opens, displaying all recipients and the date the message was read.

5. Change recipient status to view all recipients who have viewed the message or not. Leave the status blank to see all recipients (default).
   The recipient list refreshes to display the selected criteria.

6. Click **Return to Search**.
   The View Message Recipients page opens.

**NOTE:** Once messages are archived they cannot be retracted or deleted, and message recipients may not be viewed.
Module 5: Other Features

Lessons:
- Searching in AIS
- Grid Download to Excel
- Find
- Customize

Lesson 7: Searching in AIS

If you need to search for a term, class number or faculty member, click ![Search Button].

Searching Terms:
Terms are identified by a four-digit number. For example, the term 2088 stands for year 2008 fall quarter. The quarters are:

0 = Winter
2 = Spring
4 = Summer
8 = Fall

Searching Class Numbers:
When searching by class number you always need to enter the term first.
The Academic Institution is always UCSCM (the main UCSC Campus).
The Academic Group is always GEN (General UCSC)
The Subject area is the 3-4 letter code for the subject (for example, ECON for Economics or ANTH for Anthropology).

Searching Instructors:
If you do not know the instructor’s ID number, click the search button and search by last and first name. If you only know part of the last name, enter that and use the “begins with” or “contains” search options and all instructors with that text in their name will display (e.g., Begins with Will finds Willard, Williams, Willis, etc.).
Lesson 8: Grid Download to Excel

AIS offers the ability to download a table into an Excel spreadsheet.

1. Click UCSC Messaging.
   The UCSC Messaging options display.

2. Click View Message Recipients.
   The View Message Recipients search page opens.

3. Enter specific search criteria or click \(\text{Search}\) to view all messages sent.
   The Search Results display at the bottom of the page.

4. Select the message to view recipients.
   The Message Recipients page opens, displaying all recipients and the date the message was read.

5. Click \(\text{Download}\).
   Depending on your browser settings, the file either downloads to your computer with the name “ps.xls”,
   or the File Download window opens.

6. If the File Download window opened, click \(\text{OK}\).
   The file opens in Excel format.
Lesson 9: Find

If you are looking for a specific person or ID from message recipients, you can use the Find feature. It allows you to find one specific ID or person.

1. Click UCSC Messaging.
   The UCSC Messaging options display.

2. Click View Message Recipients.
   The View Message Recipients search page opens.

3. Enter specific search criteria or click Search to view all messages sent.
   The Search Results display at the bottom of the page.

4. Select the message to view recipients.
   The Message Recipients page opens, displaying all recipients and the date the message was read.

5. Click Find.
   The Find prompt window opens.

6. Enter the ID or name of person to find.

7. Click OK.
   The first person matching the criteria moves to the first row of the Message Recipients table.
Lesson 10: Customize

The Customize feature allows users to change the column order in a table in AIS.

1. Click UCSC Messaging.
   The UCSC Messaging options display.

2. Click View Message Recipients.
   The View Message Recipients search page opens.

3. Enter specific search criteria or click Search to view all messages sent.
   The Search Results display at the bottom of the page.

4. Select the message to view recipients.
   The Message Recipients page opens, displaying all recipients and the date the message was read.

5. Click Customize.
   The page refreshes and displays the Personalize Column page.

   ![Personalize Column](image)

6. Select a column name (e.g., Date Read) and click the up and down arrows to change the order of the columns; the first column in the list will display on the left-most side of the table.

7. Click OK.
   Page refreshes and the changes are reflected in the Message Recipients table.
Module 6: Logging Out

Lesson 11: Logging Out

If you are inactive in MyUCSC for 20 minutes it will time you out. You can be considered “inactive” even if you are entering data; click Save or Update periodically to prevent getting timed out and losing the work you have done.

When leaving your computer for an extended period of time it is a good idea to log out, so data is safe from other viewers and so it is not lost by being timed out.

- Click Sign Out to log out of the MyUCSC portal or AIS.
  
  The application closes and the log in page displays.

Training Complete!

Now that you’ve reviewed the training workbook, please take the My Messages training quiz at: http://its.ucsc.edu/ais/training/My%20Messaging%20Quiz.swf.

Once you’ve completed the quiz, within three business days you should receive notification that your My Messages access has been established. Once you have access to My Messages, please revisit this workbook to try out some of the exercises.

If you have questions about obtaining My Messages access or you need help, please open an IT Request ticket by logging in at itrequest.ucsc.edu or emailing help@ucsc.edu.