

Academic Senate Data Management System (DMS)

August 14, 2024

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Discussion

Requested Updates for Upcoming Development Cycle

The following list of updates are planned for implementation before the end of September.

Dashboard Committee Links to Committee Inbox

Request: Automatic Admin view as soon as we login to DMS. Once we login and click our desired committee/council, we should be routed to Admin view (without going to the top-right corner and clicking “DMS Admin”)

This request is to update the Committee links displayed below to link to the DMS Committee Inbox instead of the Committee Member’s view:



Issue Management (Admin)



Councils & Committees (Admin)

- [Academic Senate Chair](#)
- [Academic Senate Staff](#)
- [Committee on Faculty Grants](#)
- [DMS Developers](#)

We will make this a global setting for each campus, if they choose to enable it. Note that when viewing the Committee Inbox, there is a link that will take you to the Committee Member view:

Inbox

Current Issues

Search

June 14, 2024 (Fri) 1:00 - 3:00 pm

Application CFC Transition

Contents Available to Committee

Agenda

Reference Materials

DMS Developers (DMS-DEV)

Filter issue by title

Councils & Committees > DMS-DEV

Issues Under Review - DMS Developers (DMS-DEV)

Issue	SW	Meeting Dates	Internal Deadline	Master Deadline	Owner	Assignments
☐ Test Upload			Info	Info	DMS-DEV	
☐ Test Upload 2			Info	Info	DMS-DEV	Staff
☐ Test document 8 (4)			Info	Info	DMS-DEV	
☐ More Testing			Info	Info	DMS-DEV	
☐ Testing Deletes			Info	Info	DMS-DEV	

Legend

UCSB:
UCI: No
UCLA: Yes

Committee Inbox: Upcoming Internal Deadline Alert

Request: Add internal deadline alerts (exclamation point, red dot?) to remind analysts of their upcoming deadlines for assigned issues.

We will add an indicator to the Committee Inbox to draw attention to assigned Issues that a committee has not submitted a Final Response for. We will have a configurable setting for each campus to determine when to display this indicator, but since some committees meet monthly, we’re anticipating setting a default of **3 weeks**.

There will be links to the specific Issue, as well as a link to the Committee Inbox. This listing will also indicate if the Issue is flagged as Systemwide.

[What happens after the deadline?]

Dashboard

Upcoming Meetings			
August 14, 2024	2:00 - 3:00 pm	Academic Senate Staff	online
Upcoming Deadlines			
August 15, 2024	DEV-DMS	Demo issue requiring response	

New Document Type: Administrative Response (and Final Administrative Response)

Request: Add “Administrative Response” category in “Document Type” drop-down menu for document uploads within an issue.

The intention of this document type is to separate responses received from Administration, UCOP, Chancellor, etc., and the document type will be listed on all areas of DMS where document type is displayed.

Document types of **Administrative Response** and **Final Administrative Response** will be added.

Document	
Document Type	Administrative Response ▼
Document Owner	DMS-DEV Change Owner
Append Title	☐
Document Title	Chancellor
Display Name	DMS-DEV Administrative Response - Chancellor

Inbound or Support Document	Draft Response	Final Response	Administrative Response
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[Upload Document\(s\)](#)

[Add External URL Link](#)

[Scan-In / Email-In Documents](#)

These documents can also be made Public, and be made accessible to view on the Current Issues page, if enabled for your campus.

New Issue Status: Pending Response

Request: Add "Pending Response" button/check box to track issues (on comm/council issue page) that are pending response and from whom (e.g. Administration, Senate Committee/Council, UCOP). Due to high volume of working issues, analysts require a view that allows us to sort through issues by current status. (Proposed "pending response" options: Pending Comm/Council Response, Pending Admin Response, Pending UCOP Response)

We can include a toggle to Pending Status, with options of **Pending Council/Committee Response (Internal)** and **Pending Administrative Response (External)**.

This could be made available when accessing a specific issue:

Actions to affect DMS-DEV:	Set Pending Status	Copy Issue to Another Committee	Clear Response Status	Archive Issue
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And in the Committee Inbox when selecting the checkboxes available next to the Issue:

DMS Developers (DMS-DEV)

Filter issue by title

Issues Under Review - DMS Developers (DMS-DEV)

Issue	SW
☒ Test Upload	
☒ Test Upload 2	

Archive Selected Issues

Set Pending Status

[Clear Selection](#)

An additional column will be added to the Committee Inbox, and we'll adjust the default sorting to move these Issues to the bottom of the "Issues Under Review" section.

This status will also be displayed to anyone who has access to this issue, including council/committee members, and the Current Issues page, if this feature is enabled for your campus.

Issue History Report

Request: Add function to pull reports with information on the Issue's workflow and current status. Analysts require reporting capabilities to pull and sort issues by AY, current status (archived/finalized, pending response, etc), creation date, submitted response dates, meeting dates, committee assignments, Issue type, finalized date, etc. (Similar to the faculty grant reports that we pull)

This report will provide detail about the entire lifecycle of a single issue, including the meeting dates of the assigned councils/committees where the issue was discussed.

We will also include internal/Senate Staff-only links to the documents.

This request is also for a report that covers multiple Issues. We plan on creating a report for an individual Issue first. Once that's complete, we'll investigate ways to display this type of information for multiple Issues.

Recent Changes/Enhancements

Recent DMS Updates Section / Updated Feature Rollout Change

Visible to Senate Staff only, the goal of this enhancement is to keep all Senate Staff apprised of changes to the DMS.

With this change, we're introducing changes in how we're rolling out updates to the DMS:

- A new **Recent DMS Updates** section has been added to your Dashboards:

RECENT DMS UPDATES

[In Progress](#)

[Reporting Improvements and Interface Updates](#)

[Updated Reports](#) 

- New features will be announced through this interface
 - If there's a primary analyst associated with the change, we will also email them directly
- The listing will indicate what module has changed, the specific changes (linking to a Google Doc if extensive)

RECENT DMS UPDATES

[In Progress](#)

[Reporting Improvements and Interface Updates](#)

[Updated Reports](#) 

Description:

Updates include styling changes and a more consistent interface, as well as performance and features improvements. Additional information about these changes can be found [here](#).

These will be fully deployed on **Friday, August 30**, after which the original reports will no longer be available. Please review the changes before this date, and report any issues to help@aait.ucsb.edu  before we complete this transition.

Updated Reports:

[Committee Services Report](#) 

[ConC Area Reports](#) 

- The original version of the page will also be available for comparison and as a backup, in case any issues are discovered with the update.
- During this time, the updated pages themselves will also display a message similar to the following:

These reports have recently been updated.

More information about the changes can be found [here](#). Feedback or issues can be reported [here](#) .

During this review period, the original page can be accessed [here](#).

- If no feedback has been received during the evaluation period, we will make the change permanent, removing the above message from the updated pages.

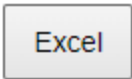
The following reporting updates will be the first test of this new system. We will continue to revise and refine this process as we release additional enhancements, but feedback regarding reasonable review periods, etc. are welcomed.

Reporting Updates

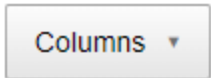
In conjunction with the Recent DMS Updates section, we will be releasing enhanced versions of the various DMS reports and these will be available for testing before we fully deploy. The updates include visual as well as performance enhancements.

We're hoping to get most of the reports to consistently look and behave similarly and have the following features available:

Excel Download Feature:



Column Toggle Feature:



Search Feature:

Search:

Enhancements to UCLA Committee Interest Survey

We are testing an update to the Committee Interest Survey, which allows for someone to rank committees in order of preference.

This update allows a campus to specify a maximum number of committees that can be ranked. When a rank is chosen, then that value is no longer available to select.

Academic Programs and Policies

- ✓ 3

[Academic Program Review Committee \(APRC\)](#) ⓘ - Meets as needed.
- ▼

[Committee on International Education \(CIE\)](#) ⓘ - Meets typically twice per quarter during the academic year.
- ▼

[Committee on Undergraduate Admissions and Relations with Schools \(CUARS\)](#) ⓘ - Meets generally on the third Friday of each month during the academic year.
- 1 ▼

[Council on Planning and Budget \(CPB\)](#) ⓘ - Meets on alternate Monday afternoons during the academic year.
- ▼

[Graduate Council \(GC\)](#) ⓘ - Meets on alternate Fridays from 1:00 - 3:00 pm during the academic year.
- 2 ▼

[Undergraduate Council \(UgC\)](#) ⓘ - Meets on alternate Fridays during the academic year.

Proxy As: VPN Range Updates

UCLA and UCI had both reported some sporadic issues in using the Proxy As feature. This feature is currently restricted to connections from the Senate Offices and campus VPN.

During our investigation, we noticed that the IP address ranges for the campus VPNs were expanded. Updating our checks seems to have resolved this issue.

User's Guide & Available Features

- Training Resources: <https://aait.ucsb.edu/projects/dms/training-resources>
- Available Options: <https://aait.ucsb.edu/projects/dms/available-options>

Bugfixes

- [Move to next agenda] - Updated the "Add this issue to upcoming meeting" function to no longer be restricted to the current Academic Year. This will now show all future meeting dates for the committee.

Follow-Up/Awaiting

Public Current Issues Page

Request: Make the issue status public when the issue is published for transparency purposes.

While we will include the pertinent information from the above enhancement list, we will work directly with UCLA/Adriana on a further redesign of the Current Issues page for UCLA.

Current Effort

- Current DMS Enhancement Requests (See Trello Board for complete list)

New Business

- Additional Updates Requested
 - Feature: Individuals can RSVP to scheduled committee meetings directly in DMS.
 - Feature: Meetings can be set to accept RSVPs from anyone (LgA) or only from committee members (all other committee meetings).
 - Feature: As DMS already requires SSO logon, the RSVP should automatically identify the RSVPPer's information (e.g., title, department), and whether or not they are a committee

member, so the RSVP should be relatively simple, like logging into DMS, clicking on the meeting, and clicking Yes/No to RSVP.

- Feature: Each meeting will have a linkable RSVP URL (that we could include in emails)

DMS Zoom Meeting ID is: 947378745 - <https://ucsb.zoom.us/j/947378745>

This document will be updated after the call to capture additional discussion items and corrections.