

UC OATS User Interface Change Announcement – Health Science APM-671

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Reviewer Announcement

Big changes are coming to your UC OATS workspace in release 5.63! To improve the visibility of your workload in UC OATS, we have made some changes to your workspace.

With release 5.63 we are introducing new UC OATS Dashboard! Now when you log in you will see forms in your queue and annual certification reports in one place! The Dashboard includes forms and annual certification reports across fiscal years, arranged by the number of days a form has been in your queue. The Dashboard also includes queue summaries and an annual certification status chart!

The screenshot displays the UC OATS Dashboard interface. At the top, it features the University of California logo and the OATS acronym. A navigation bar includes tabs for DASHBOARD, FACULTY, FORMS, ACTIVITIES, and ANNUAL CERT. A user greeting 'WELCOME, TOM CRUZ' and a 'Logout' button are visible. Below the navigation, there's a 'View by Unit' dropdown menu. The main content area is divided into several sections:

- FORMS IN MY QUEUE:** A table listing forms with columns for Actions, Last Name, First Name, Type, FY, and # Days in Queue.

Actions	Last Name	First Name	Type	FY	# Days in Queue
Category I Div. Reviewer	Bruin	Joe	Category I	2020-2021	203
Student Involvement Div. Reviewer	Bruin	Josephine	Student Involvement	2021-2022	2
Category I Div. Reviewer	Bear	Panda	Category I	2021-2022	1
Category I Div. Reviewer	Anteater	Alvin	Category I	2021-2022	1
- SUMMARY:** A table showing the number of forms by fiscal year.

Fiscal Year	# of Forms
2021-2022	11
2020-2021	1

Annual Certification:

Fiscal Year	# of Forms
2020-2021	14
2019-2020	1
- ANNUAL CERTIFICATIONS IN MY QUEUE:** A table listing annual certifications with columns for Actions, Last Name, First Name, # Activities, FY, and # Days in Queue.

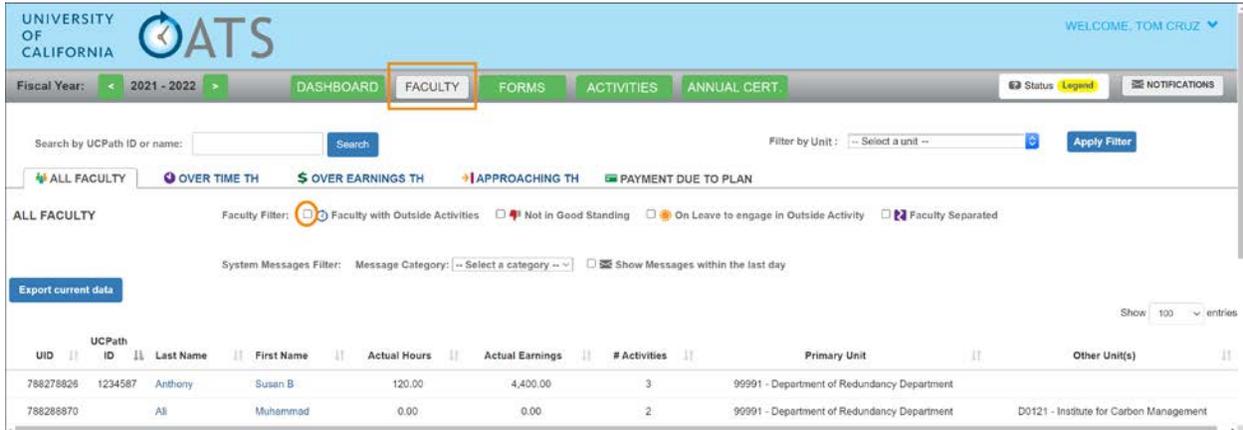
Actions	Last Name	First Name	# Activities	FY	# Days in Queue
Annual Certification Div. Reviewer	Triton	King	0	2019-2020	456
Annual Certification Div. Reviewer	Bananna	Slug	5	2020-2021	5
Annual Certification Div. Reviewer	Golden	Bear	0	2001-2021	2
Annual Certification Div. Reviewer	Anteater	Alice	14	2020-2021	2
- ANNUAL CERT. FY 2020-2021:** A pie chart showing the status of annual certifications for the fiscal year 2020-2021.
 - Accepted AC: 60 (Blue)
 - In process AC: 15 (Light Blue)
 - Not submitted AC: 30 (Orange)
 - Total N = 105

† The "No Activities" filter only includes activities that are required to be reported under UC APM policies (Category I & II for all faculty and compensated Category III for APM-240 & APM-246).

Your UC OATS workspace has been rearranged to make finding the information you need easier. The following is a brief description of each section in your workspace.

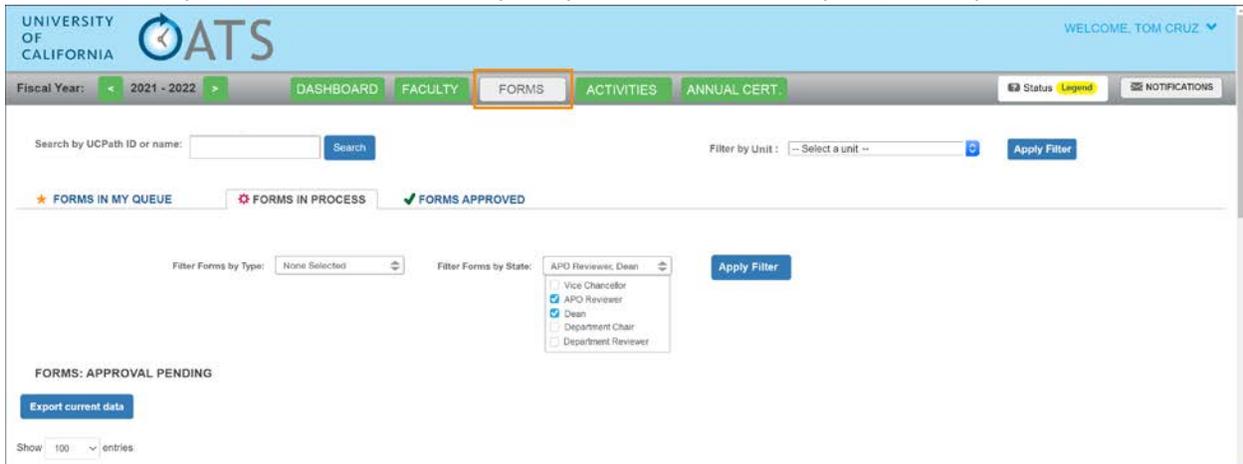
Faculty button

The Faculty button now includes 'Faculty Payments' formerly known as 'Payments Due to Plan.' 'Faculty Payments' is for Health Science reviewers. The Faculty with Outside Activities filter is now unselected by default.



Forms button

The new Forms button includes the forms queue and two form reports. The forms queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view all forms in your queue across all fiscal years, check your Dashboard.



Activities button

The new Activities button includes two activity reports and Stock Valuation. Stock Valuation is only available to Health Science reviewers who are assigned the Stock Evaluator role.

UNIVERSITY OF CALIFORNIA OATS WELCOME, TOM CRUZ

Fiscal Year: 2021 - 2022 DASHBOARD FACULTY FORMS **ACTIVITIES** ANNUAL CERT Status Legend NOTIFICATIONS

Search by UCPATH ID or name: Search Filter by Unit: -- Select a unit -- Apply Filter

ALL ACTIVITIES DELETED ACTIVITIES STOCK VALUATION

Filter Forms by Type: None Selected Filter Forms by State: APO Reviewer, Dean Vice Chancellor APO Reviewer (checked) Dean Department Chair Department Reviewer Apply Filter

ALL ACTIVITIES WITH FORMS

Annual Certification button

The new Annual Certification (AC) button includes the AC queue and three AC reports. The AC queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view AC forms in your queue across all fiscal years, check your Dashboard.

UNIVERSITY OF CALIFORNIA OATS WELCOME, TOM CRUZ

Fiscal Year: 2020 - 2021 DASHBOARD FACULTY FORMS ACTIVITIES **ANNUAL CERT.** Status Legend NOTIFICATIONS

Search by UCPATH ID or name: Search

AC IN MY QUEUE AC NOT SUBMITTED AC IN PROCESS FORMS APPROVED

IN QUEUE Without activities With activities

Export current data

Show 100 entries

UID	UCPATH ID	Faculty	Primary Unit	Other Unit(s)	Date Signed	# Activities	Total Hours	Total Earnings	Due To Plan	Form/Queue
		Robinson, Jackie	99991 - Department of Redundancy Department		10/05/2021	1	0.00	0.00	0.00	Annual Certification Department Reviewer

Approver Announcement

Big changes are coming to your UC OATS workspace in release 5.63! To improve the visibility of your workload in UC OATS, we have made some changes to your workspace.

With release 5.63 we are introducing new UC OATS Dashboard! Now when you log in you will see forms in your queue and annual certification reports in one place! The Dashboard includes forms and annual certification reports across fiscal years, arranged by the number of days a form has been in your queue. The Dashboard also includes queue summaries and an annual certification status chart!

WELCOME, JOE BRUIN ▼

DASHBOARD
FORMS & ACTIVITIES
ANNUAL CERT.

Status Legend
NOTIFICATIONS

View by Unit: -- Select a Unit -- Go

FORMS IN MY QUEUE

Actions	Last Name	First Name	Type	FY	# Days in Queue
Category I <small>Dept. Approver</small>	Bruin	Joe	Category I	2020-2021	203
Student Involvement <small>Dept. Approver</small>	Bruin	Josephine	Student Involvement	2021-2022	2
Category I <small>Dept. Approver</small>	Bear	Panda	Category I	2021-2022	1
Category I <small>Dept. Approver</small>	Anteater	Alvin	Category I	2021-2022	1

SUMMARY:

Fiscal Year	# of Forms
2021-2022	11
2020-2021	1

Annual Certification:

Fiscal Year	# of Forms
2020-2021	14
2019-2020	1

ANNUAL CERTIFICATIONS IN MY QUEUE

Filter: No Activities † With Activities All

Actions	Last Name	First Name	# Activities	FY	# Days in Queue
Annual Certification <small>Dept. Approver</small>	Triton	King	0	2019-2020	456
Annual Certification <small>Dept. Approver</small>	Bananna	Slug	5	2020-2021	5
Annual Certification <small>Dept. Approver</small>	Golden	Bear	0	2001-2021	2
Annual Certification <small>Dept. Approver</small>	Anteater	Alice	14	2020-2021	2

ANNUAL CERT. FY 2020-2021

Accepted AC (60)
 In process AC (15)
 Not submitted AC (30)

N = 105

†: The "No Activities" filter only includes activities that are required to be reported under UC APM policies (Category I & II for all faculty and compensated Category III for APM-240 & APM-246).

Your UC OATS workspace has been rearranged to make finding the information you need easier. The following is a brief description of each section in your workspace.

Forms & Activities button

The Forms & Activities button contains your activities queue and two activity reports. The forms queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view all forms in your queue across all fiscal years, check your Dashboard.

The screenshot shows the OATS interface with the 'FORMS & ACTIVITIES' button highlighted. The page displays a search bar, filter options, and a table of forms. The table has the following columns: Form ID, Request Approval Type, Faculty, Primary Unit, Other Unit(s), Activity Label, Org. Name, Activity Type(s), Submission Date, and Form/Queue. A single entry is visible for form ID 4771, with a status of 'Exceed Threshold' and a 'Department Chair' label.

Form ID	Request Approval Type	Faculty	Primary Unit	Other Unit(s)	Activity Label	Org. Name	Activity Type(s)	Submission Date	Form/Queue
4771	Exceed Threshold	Wong, Anna May	99991 - Department of Redundancy Department		Memory Labs Science Chief	Memory Labs II LLC	Research outside the University (Cat. 1) Employment outside the University (Cat. 1) Assuming an executive or managerial position outside of the University (Cat. 1)	08/30/2021	Exceed Threshold Department Chair

Annual Certification button

The Annual Certification (AC) button includes the AC queue and three AC reports. The AC queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view AC forms in your queue across all fiscal years, check your Dashboard.

The screenshot shows the OATS interface with the 'ANNUAL CERT.' button highlighted. The page displays a search bar, filter options, and a table of annual certifications. The table has the following columns: UID, UCPath ID, Faculty, Primary Unit, Other Unit(s), Date Signed, Accepted Date, # Activities, Total Hours, Total Earnings, Due To Plan, and Form/Queue. A single entry is visible for UID 1234587, with a status of 'Annual Certification' and a 'Department Chair' label.

UID	UCPath ID	Faculty	Primary Unit	Other Unit(s)	Date Signed	Accepted Date	# Activities	Total Hours	Total Earnings	Due To Plan	Form/Queue
1234587		Robinson, Jackie	99991 - Department of Redundancy Department		07/22/2021		1	80.00	4,000.00	0.00	Annual Certification Department Chair

UC OATS UI Campus Announcement – General Campus APM-025

Reviewer Announcement

Big changes are coming to your UC OATS workspace in release 5.63! To improve the visibility of your workload in UC OATS, we have made some changes to your workspace.

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The screenshot shows the UC OATS Dashboard interface. At the top, there is a navigation bar with the University of California logo and 'OATS' branding. A 'DASHBOARD' tab is highlighted. Below the navigation bar, there are filters for 'View by Unit' and 'Status' (Logged). The main content area is divided into several sections:

- FORMS IN MY QUEUE:** A table listing forms with columns for Actions, Last Name, First Name, Type, FY, and # Days in Queue.

Actions	Last Name	First Name	Type	FY	# Days in Queue
Category I Div. Reviews	Bruin	Joe	Category I	2020-2021	203
Student Involvement Div. Reviews	Bruin	Josephine	Student Involvement	2021-2022	2
Category I Div. Reviews	Bear	Panda	Category I	2021-2022	1
Category I Div. Reviews	Anteater	Alvin	Category I	2021-2022	1
- SUMMARY:** A table showing the number of forms by fiscal year.

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2021-2022	11
2020-2021	1

Annual Certification:

Fiscal Year	# of Forms
2020-2021	14
2019-2020	1
- ANNUAL CERTIFICATIONS IN MY QUEUE:** A table listing annual certifications with columns for Actions, Last Name, First Name, # Activities, FY, and # Days in Queue.

Actions	Last Name	First Name	# Activities	FY	# Days in Queue
Annual Certification Div. Reviews	Triton	King	0	2019-2020	456
Annual Certification Div. Reviews	Bananna	Slug	5	2020-2021	5
Annual Certification Div. Reviews	Golden	Bear	0	2001-2021	2
Annual Certification Div. Reviews	Anteater	Alice	14	2020-2021	2
- ANNUAL CERT. FY 2020-2021:** A pie chart showing the status of annual certifications for FY 2020-2021.
 - Accepted AC (60)
 - In process AC (15)
 - Not submitted AC (30)

N = 105

†: The "No Activities" filter only includes activities that are required to be reported under UC APM policies (Category I & II for all faculty and compensated Category III for APM-240 & APM-246).

Your UC OATS workspace has been rearranged to make finding the information you need easier. The following is a brief description of each section in your workspace.

Faculty button

The 'Faculty with Outside Activities' filter is now unselected by default. Now when you select the 'All Faculty' tab, all faculty within your assigned units will appear.

UNIVERSITY OF CALIFORNIA OATS WELCOME, TOM CRUZ

Fiscal Year: 2021 - 2022 DASHBOARD **FACULTY** FORMS ACTIVITIES ANNUAL CERT Status Legend NOTIFICATIONS

Search by UCPath ID or name: [] Search Filter by Unit: -- Select a unit -- Apply Filter

ALL FACULTY OVER TIME TH OVER EARNINGS TH APPROACHING TH PAYMENT DUE TO PLAN

ALL FACULTY Faculty Filter: Faculty with Outside Activities Not in Good Standing On Leave to engage in Outside Activity Faculty Separated

System Messages Filter: Message Category: -- Select a category -- Show Messages within the last day

Export current data Show 100 entries

UID	UCPath ID	Last Name	First Name	Actual Hours	Actual Earnings	# Activities	Primary Unit	Other Unit(s)
788278826	1234567	Anthony	Susan B.	120.00	4,400.00	3	99991 - Department of Redundancy Department	
788288870		Ali	Muhammad	0.00	0.00	2	99991 - Department of Redundancy Department	D0121 - Institute for Carbon Management

Forms button

The new Forms button includes the forms queue and two form reports. The forms queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view all forms in your queue across all fiscal years, check your Dashboard.

UNIVERSITY OF CALIFORNIA OATS WELCOME, TOM CRUZ

Fiscal Year: 2021 - 2022 DASHBOARD FACULTY **FORMS** ACTIVITIES ANNUAL CERT Status Legend NOTIFICATIONS

Search by UCPath ID or name: [] Search Filter by Unit: -- Select a unit -- Apply Filter

FORMS IN MY QUEUE FORMS IN PROCESS FORMS APPROVED

Filter Forms by Type: None Selected Filter Forms by State: APO Reviews: Dean

- Vice Chancellor
- APO Reviewer
- Dean
- Department Chair
- Department Reviewer

Apply Filter

FORMS: APPROVAL PENDING

Export current data Show 100 entries

Activities button

The new Activities button includes two activity reports and an multi-select filter.

The screenshot shows the OATS system interface. The navigation menu at the top includes 'DASHBOARD', 'FACULTY', 'FORMS', 'ACTIVITIES', and 'ANNUAL CERT.'. The 'ACTIVITIES' button is highlighted with an orange box. Below the navigation menu, there is a search bar for 'UCPath ID or name' and a 'Filter by Unit' dropdown. The main content area shows 'ALL ACTIVITIES' and 'DELETED ACTIVITIES' tabs. There are also filters for 'Filter Forms by Type' (set to 'None Selected') and 'Filter Forms by State' (set to 'APO Reviewer, Dean'). A dropdown menu for 'Filter Forms by State' is open, showing options: 'Vice Chancellor', 'APO Reviewer', 'Dean', 'Department Chair', and 'Department Reviewer'. The 'APO Reviewer' and 'Dean' options are checked. An 'Apply Filter' button is visible. The page title is 'ALL ACTIVITIES WITH FORMS'.

Annual Certification button

The new Annual Certification (AC) button includes the AC queue and three AC reports. The AC queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view AC forms in your queue across all fiscal years, check your Dashboard.

The screenshot shows the OATS system interface. The navigation menu at the top includes 'DASHBOARD', 'FACULTY', 'FORMS', 'ACTIVITIES', and 'ANNUAL CERT.'. The 'ANNUAL CERT.' button is highlighted with an orange box. Below the navigation menu, there is a search bar for 'UCPath ID or name' and a 'Status Legend' button. The main content area shows 'AC IN MY QUEUE', 'AC NOT SUBMITTED', 'AC IN PROCESS', and 'FORMS APPROVED' tabs. There is a filter for 'IN QUEUE' with options 'Without activities' and 'With activities'. An 'Export current data' button is visible. Below the filter, there is a table with columns: 'UID', 'UCPath ID', 'Faculty', 'Primary Unit', 'Other Unit(s)', 'Date Signed', '# Activities', 'Total Hours', 'Total Earnings', 'Due To Plan', and 'Form/Queue'. The table contains one row of data for Jackie Robinson. A button labeled 'Annual Certification Department Reviewer' is visible in the bottom right corner of the table.

UID	UCPath ID	Faculty	Primary Unit	Other Unit(s)	Date Signed	# Activities	Total Hours	Total Earnings	Due To Plan	Form/Queue
		Robinson, Jackie	99991 - Department of Redundancy Department		10/05/2021	1	0.00	0.00	0.00	Annual Certification Department Reviewer

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WELCOME, JOE BRUIN

DASHBOARD
FORMS & ACTIVITIES
ANNUAL CERT.

Status Legend
NOTIFICATIONS

View by Unit: -- Select a Unit -- Go

FORMS IN MY QUEUE

Actions	Last Name	First Name	Type	FY	# Days in Queue
Category I <small>Dept. Approver</small>	Bruin	Joe	Category I	2020-2021	203
Student Involvement <small>Dept. Approver</small>	Bruin	Josephine	Student Involvement	2021-2022	2
Category I <small>Dept. Approver</small>	Bear	Panda	Category I	2021-2022	1
Category I <small>Dept. Approver</small>	Anteater	Alvin	Category I	2021-2022	1

SUMMARY:

Fiscal Year	# of Forms
2021-2022	11
2020-2021	1

Annual Certification:

Fiscal Year	# of Forms
2020-2021	14
2019-2020	1

ANNUAL CERTIFICATIONS IN MY QUEUE

Filter: No Activities † With Activities All

Actions	Last Name	First Name	# Activities	FY	# Days in Queue
Annual Certification <small>Dept. Approver</small>	Triton	King	0	2019-2020	456
Annual Certification <small>Dept. Approver</small>	Bananna	Slug	5	2020-2021	5
Annual Certification <small>Dept. Approver</small>	Golden	Bear	0	2001-2021	2
Annual Certification <small>Dept. Approver</small>	Anteater	Alice	14	2020-2021	2

ANNUAL CERT. FY 2020-2021

Accepted AC (60)
 In process AC (15)
 Not submitted AC (30)

N = 105

†: The "No Activities" filter only includes activities that are required to be reported under UC APM policies (Category I & II for all faculty and compensated Category III for APM-240 & APM-246).

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The screenshot shows the 'Forms & Activities' section of the OATS workspace. The 'FORMS & ACTIVITIES' button is highlighted in the top navigation bar. Below the navigation bar, there are search and filter options. The main content area is titled 'FORMS: APPROVAL PENDING' and includes an 'Export current data' button and a 'Show 100 entries' dropdown. A table lists the following form:

Form ID	Request Approval Type	Faculty	Primary Unit	Other Unit(s)	Activity Label	Org. Name	Activity Type(s)	Submission Date	Form/Queue
4771	Exceed Threshold	Wong, Anna May	99991 - Department of Redundancy Department		Memory Labs Science Chief	Memory Labs II LLC	Research outside the University (Cat. 1) Employment outside the University (Cat. 1) Assuming an executive or managerial position outside of the University (Cat. 1)	08/30/2021	Exceed Threshold Department Chair

Showing 1 to 1 of 1 entries

Annual Certification button

The Annual Certification (AC) button includes the AC queue and three AC reports. The AC queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view AC forms in your queue across all fiscal years, use the Dashboard.

The screenshot shows the 'Annual Certification' section of the OATS workspace. The 'ANNUAL CERT.' button is highlighted in the top navigation bar. Below the navigation bar, there are search and filter options. The main content area is titled 'FACULTY: ANNUAL CERTIFICATIONS' and includes an 'Export current data' button and a 'Show 100 entries' dropdown. A table lists the following annual certification:

UCPATH UID	Faculty	Primary Unit	Other Unit(s)	Date Signed	Accepted Date	# Activities	Total Hours	Total Earnings	Due To Plan	Form/Queue
1234587	Robinson, Jackie	99991 - Department of Redundancy Department		07/22/2021		1	80.00	0.00	0.00	Annual Certification Department Chair

Showing 1 to 1 of 1 entries