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Reviewers: Your UC OATS workspace has been rearranged to make finding the information you need easier.

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.

UNIVERSITY OF CALIFORNIA



WELCOME, TOM CRUZ

DASHBOARD

FACULTY

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
<div>Category I</div> <div>Div. Reviewer</div>	Bruin	Joe	Category I	2020-2021	203
<div>Student Involvement</div> <div>Div. Reviewer</div>	Bruin	Josephine	Student Involvement	2021-2022	2
<div>Category I</div> <div>Div. Reviewer</div>	Bear	Panda	Category I	2021-2022	1
<div>Category I</div> <div>Div. Reviewer</div>	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
<div>Annual Certification</div> <div>Div. Reviewer</div>	Triton	King	0	2019-2020	456
<div>Annual Certification</div> <div>Div. Reviewer</div>	Bananna	Slug	5	2020-2021	5
<div>Annual Certification</div> <div>Div. Reviewer</div>	Golden	Bear	0	2001-2021	2
<div>Annual Certification</div> <div>Div. Reviewer</div>	Anteater	Alice	14	2020-2021	2

ANNUAL CERT. FY 2020-2021

Accepted AC (60)

In process AC (15)

Not submitted AC (30)

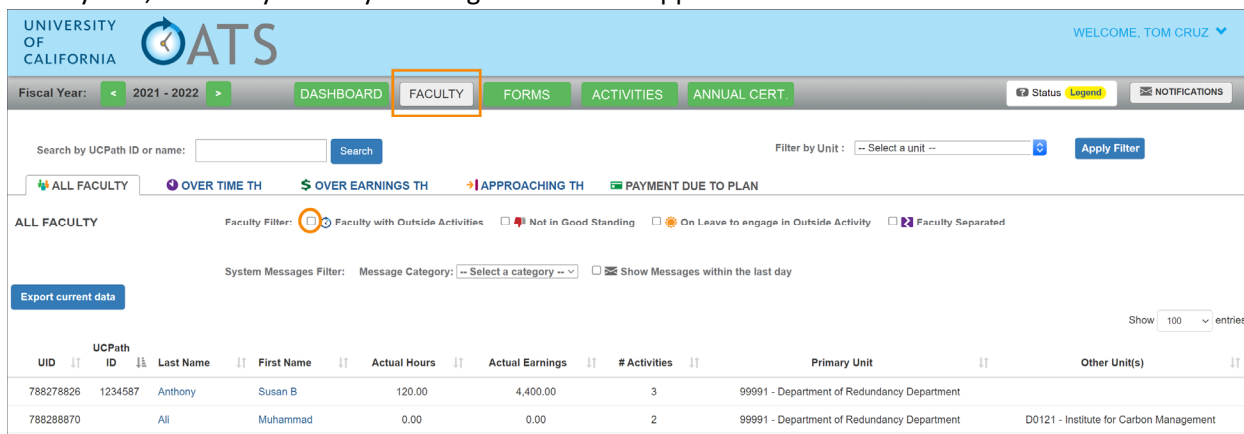


N = 105

†: 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).

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.

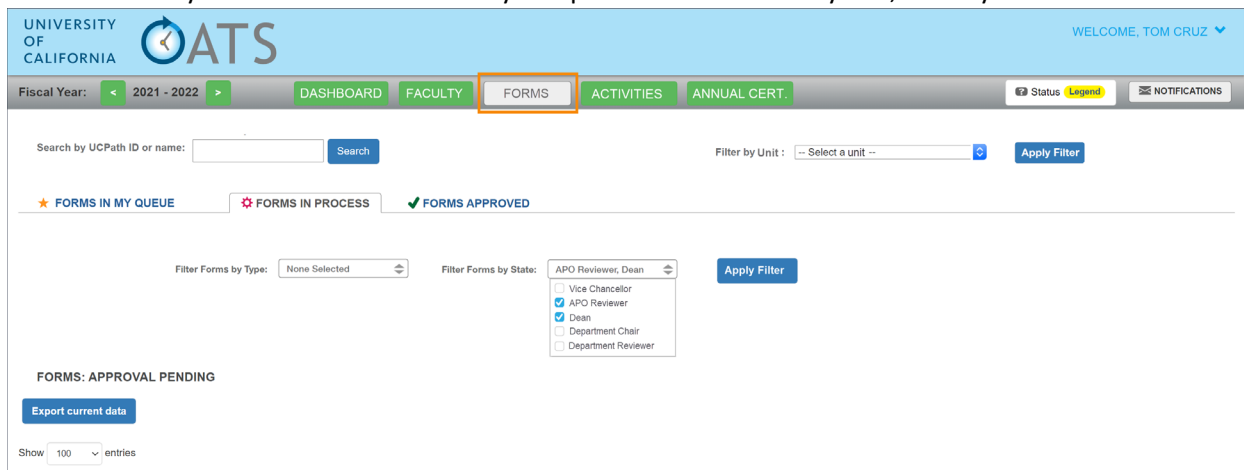


The screenshot shows the OATS (University of California) interface. The 'FACULTY' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar and a 'Filter by Unit' dropdown. The 'ALL FACULTY' tab is selected, and the 'Faculty Filter' section shows 'Faculty with Outside Activities' as the active filter. The 'System Messages Filter' is set to 'Message Category: -- Select a category --'. The 'Export current data' button is visible. The table below shows faculty data for the fiscal year 2021-2022.

UID	UCPath ID	Last Name	First Name	Actual Hours	Actual Earnings	# Activities	Primary Unit	Other Unit(s)
788278826	1234587	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

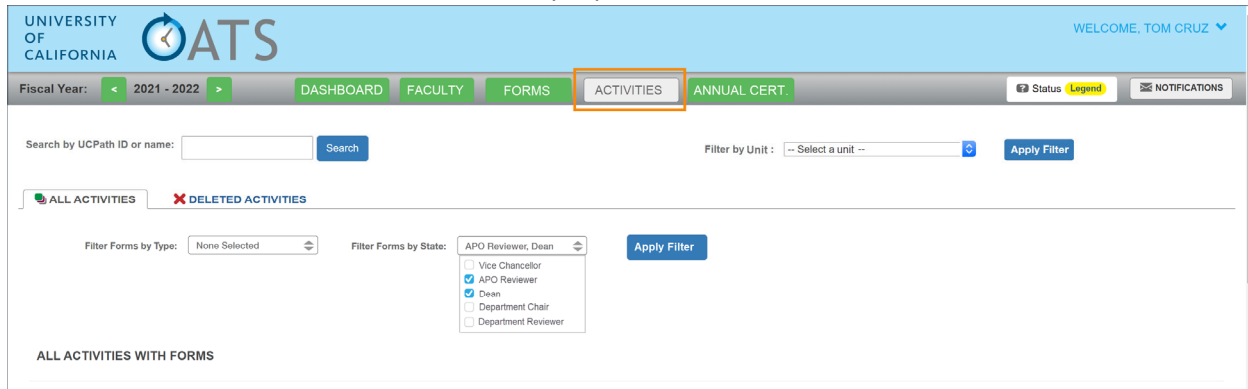
The new Forms button includes the forms queue and two form reports. The forms queue and reports in this section are listed by fiscal year, so you will need to use the Fiscal Year indicator to view forms in different fiscal years. To view all forms in your queue across all fiscal years, check your Dashboard.



The screenshot shows the OATS (University of California) interface. The 'FORMS' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar and a 'Filter by Unit' dropdown. The 'FORMS IN MY QUEUE' tab is selected. The 'Filter Forms by Type' is set to 'None Selected' and the 'Filter Forms by State' is set to 'APO Reviewer, Dean'. The 'Apply Filter' button is visible. The 'FORMS: APPROVAL PENDING' section is shown, and the 'Export current data' button is visible. The 'Show' dropdown is set to '100' entries.

Activities button

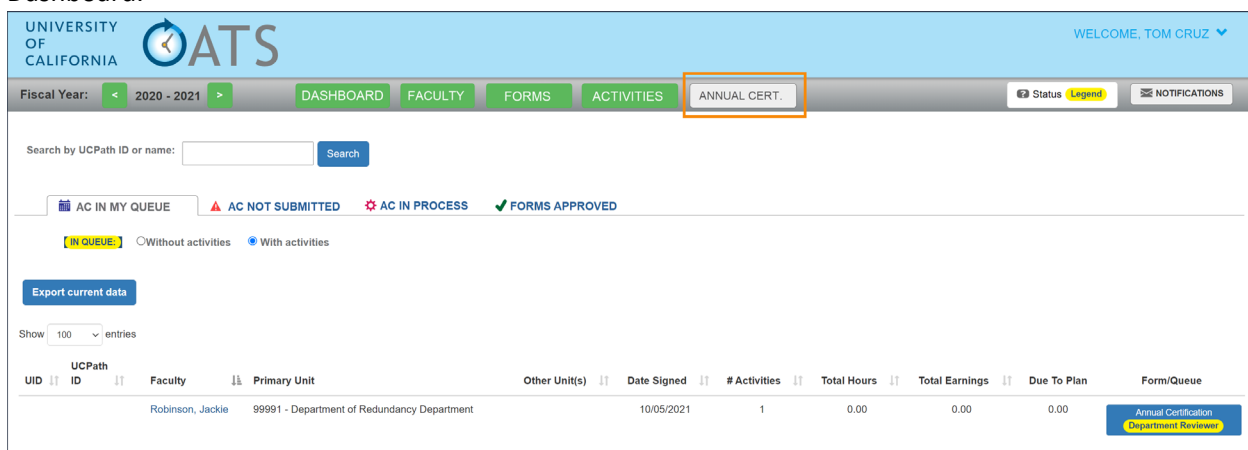
The new Activities button includes two activity reports and an multi-select filter.



The screenshot shows the OATS (University of California Activities Tracking System) interface. The top navigation bar includes the University of California logo, the OATS logo, and a welcome message for Tom Cruz. The main navigation menu has buttons for DASHBOARD, FACULTY, FORMS, ACTIVITIES (highlighted with an orange box), and ANNUAL CERT. Below the navigation bar, there is a search bar for UCPath ID or name and a filter by unit dropdown. The main content area shows a tab for ALL ACTIVITIES and a DELETED ACTIVITIES tab. There are filters for Filter Forms by Type (None Selected) and Filter Forms by State (APO Reviewer, Dean, Vice Chancellor, APO Reviewer, Dean, Department Chair, Department Reviewer). An Apply Filter button is present. 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 Annual Certification page. The top navigation bar includes the University of California logo, the OATS logo, and a welcome message for Tom Cruz. The main navigation menu has buttons for DASHBOARD, FACULTY, FORMS, ACTIVITIES, and ANNUAL CERT. (highlighted with an orange box). Below the navigation bar, there is a search bar for UCPath ID or name and a filter by unit dropdown. The main content area shows a tab for AC IN MY QUEUE and three sub-tabs: AC NOT SUBMITTED, AC IN PROCESS, and FORMS APPROVED. There is a filter for IN QUEUE (Without activities, With activities) and an Export current data button. The page title is Annual Certification. Below the filters, 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 for Robinson, Jackie, with a date signed of 10/05/2021 and 1 activity. The Form/Queue column shows Annual Certification: Department Reviewer.

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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UNIVERSITY OF CALIFORNIA
OATS
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 Dept. Approver	Bruin	Joe	Category I	2020-2021	203
Student Involvement Dept. Approver	Bruin	Josephine	Student Involvement	2021-2022	2
Category I Dept. Approver	Bear	Panda	Category I	2021-2022	1
Category I Dept. Approver	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 Dept. Approver	Triton	King	0	2019-2020	456
Annual Certification Dept. Approver	Bananna	Slug	5	2020-2021	5
Annual Certification Dept. Approver	Golden	Bear	0	2001-2021	2
Annual Certification Dept. Approver	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).

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, use the Dashboard.

UNIVERSITY OF CALIFORNIA OATS WELCOME, SUSAN B ANTHONY

Fiscal Year: 2021 - 2022 DASHBOARD **FORMS & ACTIVITIES** ANNUAL CERT. FACULTY'S VIEW Status Legend NOTIFICATIONS

Search by UCPath ID or name: Filter by date: From: To: Clear

FORMS IN MY QUEUE FORMS APPROVED ALL ACTIVITIES

Form Type Filter: ☐ Category I ☐ Student Involvement ☐ Exceed Threshold ☐ Retain Earnings Update

FORMS: APPROVAL PENDING

Export current data

Show 100 entries

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

Previous 1 Next

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.

UNIVERSITY OF CALIFORNIA OATS WELCOME, SUSAN B ANTHONY

Fiscal Year: 2021 - 2022 DASHBOARD FORMS & ACTIVITIES **ANNUAL CERT.** FACULTY'S VIEW Status Legend NOTIFICATIONS

Search by UCPath ID or name: Filter by date: From: To: Clear

AC IN MY QUEUE AC NOT SUBMITTED AC IN PROCESS AC ACCEPTED

IN QUEUE Without activities With activities

FACULTY: ANNUAL CERTIFICATIONS

Export current data

Show 100 entries

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	0.00	0.00	Annual Certification Department Chair

Showing 1 to 1 of 1 entries

Previous 1 Next