The Academic Senate uses the Data Management System (DMS) for managing, sharing, and archiving council and committee items. This guide focuses on the features of DMS and how to create, track, and respond to items as well as how to manage the agendas for the councils and committees you advise.
TABLE OF CONTENTS

Logging into DMS ................................................................................................................................. 4
Creating Systemwide, Divisional, or Committee-Level Issues ................................................................. 4
Assigning Issues to Councils, Committees and Subcommittees ............................................................... 7
Email All Analysts for an Issue ............................................................................................................... 9
Understanding Color-Coding ................................................................................................................. 10
Assigning ISSUES to the top level committee ...................................................................................... 11
Moving issues to the Archive section .................................................................................................... 11
Moving issues back to inbox .................................................................................................................. 11
Un-Hiding documents From council/committee View ......................................................................... 12
Responding to Issues ............................................................................................................................. 13
  Responding to Committee Level Issues ............................................................................................... 16
  Viewing Issue Responses By Committee ......................................................................................... 17
Managing Documents Within an Issue .................................................................................................. 18
  Reordering Documents ...................................................................................................................... 18
  Hiding and Showing Documents ........................................................................................................ 19
  Flag Documents As New ..................................................................................................................... 19
Creating a Meeting Instance (date/time/Location). ............................................................................... 20
  Adding an Issue to a Meeting .............................................................................................................. 24
  Managing Attendance .......................................................................................................................... 25
Adding References ................................................................................................................................. 28
Search Features ..................................................................................................................................... 29
  Additional Searching/Filtering for Issues ........................................................................................... 30
  Editing Keywords ............................................................................................................................... 30
  Keywords List .................................................................................................................................... 33
Admin Utilities ........................................................................................................................................ 34

For assistance, contact help@aait.ucsb.edu
ACADEMIC SENATE DATA MANAGEMENT SYSTEM
USER’S GUIDE FOR SENATE ANALYSTS

Managing Professional Names ................................................................. 34
Managing Members of a Committee ......................................................... 36
Managing a Department Name ................................................................. 39
Converting a PDF Portfolio into a Normal PDF ........................................ 40
LOGGING INTO DMS

1. Access the Academic Senate Data Management System (DMS) at:
   a. UCSB: senate.ucsb.edu
   b. UCI: dms.senate.uci.edu
   c. UCLA: dms.senate.ucla.edu

2. Click on the Sign In button or any section of the dashboard. You will be directed to your campus’ single sign on page. After entering your credentials, you will be redirected back to DMS.

Note: When you have finished your session, log out by clicking on the Sign Out link at the top right corner of the page. Be sure to completely exit your browser to protect your privacy. Sessions will automatically timeout after 60 minutes of inactivity.

CREATING SYSTEMWIDE, DIVISIONAL, OR COMMITTEE-LEVEL ISSUES

1. After logging in, the DMS homepage will display your Dashboard, click on the Issue Management (Admin) link above the Councils & Committees section to access the Issue Management Interface.

For assistance, contact help@aait.ucsb.edu
2. To create a new item, click the **Create New Issue at [________ Level]** button on the bottom left of the page.

3. On the following page, either drag and drop a document into the area below **File Name** or click the **Choose File...** button and select the document. Click the **Upload** button to upload the document.

4. Once the document has been uploaded, click on the appropriate file name to continue.

5. Assign the appropriate Title, Keyword, etc. to the issue.
ACADEMIC SENATE DATA MANAGEMENT SYSTEM
USER’S GUIDE FOR SENATE ANALYSTS

<table>
<thead>
<tr>
<th>Issue</th>
<th>Issue Owner</th>
<th>Systemwide Issue</th>
<th>Master Deadline</th>
<th>Issue Title</th>
<th>Keywords</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Graduate Council (GC)</td>
<td></td>
<td></td>
<td>Systemwide Review of APM</td>
<td></td>
</tr>
</tbody>
</table>

- To CREATE A COUNCIL-LEVEL ISSUE, select the Issue Owner drop down menu, and then choose the appropriate committee.

- To CREATE A DIVISIONAL-LEVEL ISSUE, select your campus’ top-level in the Issue Owner drop down menu, or create the issue from the Current Issues tab.

- To CREATE A SYSTEMWIDE ISSUE, select your campus’ top-level in the Issue Owner drop down menu, or create the issue from the Current Issues tab and check the Systemwide Issue box.

Systemwide Issues will be indicated with a systemwide icon under the Current Issues tab, and are sortable.

7. Under the Document Type drop down menu, The Default option indicates incoming or supporting documents. The Draft Response indicates a preliminary or draft version of the document. The Final Response indicates the final version of a response. The Final Response Previous option indicates a formerly finalized document being revised/re-visited at a later time.

8. When you have populated the necessary fields. Click on the Create Issue button.

9. To add additional documents to an issue, click on the Issue Title to bring up the Issue Details page. Click the Add Document(s) to ________ Level button within the Documents Visible to … section.

Repeat Step 4 (above) to drag and drop or manually browse to Upload any desired document(s).

For assistance, contact help@aait.ucsb.edu
ASSIGNING ISSUES TO COUNCILS, COMMITTEES AND SUBCOMMITTEES

1. To assign an issue to a council, click on the issue title to access the Issue Details page.


<table>
<thead>
<tr>
<th>Issue</th>
<th>SW</th>
<th>Meeting Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systemwide Review of APM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Second Systemwide Review of APM 278 and 210-6</td>
<td></td>
<td>5/8/17</td>
</tr>
</tbody>
</table>

2. Click on the Plus (+) button next to an existing assigned Council/Committee that you would like to manage the responses.

3. A popup window will show a grouping of committees to whom you can assign issues.

4. Click on the appropriate committee(s). Your selections will be highlighted in blue. More than one committee can be assigned, if desired. Existing assigned committees will be visible, but disabled. Please note that this committee listing can be filtered using the search box on top, using either committee abbreviations or committee name.

For assistance, contact help@aait.ucsb.edu
5. A “Deadline Date” can be set for all committee assignments. By default, the deadline date is set to be 2 weeks prior to the external deadline. Not specifying a deadline will mark this issue as informational for the assignees.

**Deadline:** 08/30/2017

The issue does not have an external deadline (it is marked as informational). To assign this issue as informational, leave the deadline field blank.

6. When you have made all of your selections, click the Add assignments button at the bottom right of the window.

7. The added council(s)/committee(s) will now show up under Council/Committees Assignments when viewing the Issue Details page. To modify a deadline for the committee assignment, click the Edit button and enter a specified date.

**Council/Committee Assignments**

<table>
<thead>
<tr>
<th>Council/Committee Personnel</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Council on Academic Personnel</strong></td>
<td>8/31/17</td>
</tr>
<tr>
<td><strong>Staff</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Committee on Diversity and Equal Opportunity</strong></td>
<td>8/30/17</td>
</tr>
</tbody>
</table>

**Edit CODEO Assignment**

Deadline *(Blank to make informational)*

**Delete**  **Save**

**Note:** Other than the top (parent), not-indented, council/committee assigned to an issue, each council/committee will need to have Issue Documents un-hidden by their respective Senate Analyst. See section: **UN-HIDING DOCUMENTS FROM COUNCIL/COMMITTEE VIEW**
EMAIL ALL ANALYSTS FOR AN ISSUE

From within an Issue, click the Email All Analysts icon inline with the Councils/Committees Assignments.

<table>
<thead>
<tr>
<th>Council/Committee Assignments</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council on Academic Personnel</td>
<td></td>
</tr>
<tr>
<td>Staff</td>
<td></td>
</tr>
<tr>
<td>Committee on Diversity and Equal Opportunity</td>
<td>8/31/17</td>
</tr>
<tr>
<td></td>
<td>8/30/17</td>
</tr>
</tbody>
</table>

Your default mail application should then open and a new email message should auto-populate with the appropriate involved analysts. **You will be asked to highlight the sentence in the body and then press Ctrl+V (or Command+V) to paste an email body containing a link and deadline dates for the assigned committees.**

Note: If you are using Microsoft Outlook, you will likely need to first configure Outlook to “use comma as address separator.”
UNDERSTANDING COLOR-CODING

• Councils/committees associated with issues within the **Inbox** are color-coded to indicate the status of responses and deadlines.

**Legend**

**White** = Assigned committee has not provided a response yet; deadline in the future.
**Red** = Assigned committee has not provided a response; deadline has passed.
**Yellow** = Assigned committee has provided a draft response.
**Green** = Assigned committee has provided a final response.
**Blue** = Assigned committee does not wish to opine.
**Gray** = Assigned committee was assigned this issue as informational; no response expected.

• In addition, the Deadlines associated with the issue under the **Inbox** tab indicate the committee response.
  - **White** indicates the issue is still within the working period and awaiting a response.
  - **Green** indicates a **final committee response** has been uploaded.
  - **Yellow** indicates a **committee response** has been uploaded.
  - **Red** indicates a missed deadline, no response was uploaded.

<table>
<thead>
<tr>
<th>Master Deadline</th>
<th>Internal Deadline</th>
<th>Meeting Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/31/15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![calendar] 11/29/15</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>9/17/15</strong></td>
<td></td>
<td>9/16/15</td>
</tr>
</tbody>
</table>

• Green dates are links that, when clicked, open the uploaded final committee response in a new tab in the current browser.
ASSIGNING ISSUES TO THE TOP LEVEL COMMITTEE

Rather than having a deadline date for your top level committee, assign issues to the top level with no deadline date set. The top level committee is defined by each campus. For this example we are using “Executive Board” as our top level.

**Council/Committee Assignments**

<table>
<thead>
<tr>
<th>Council on Academic Personnel</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>Info</td>
</tr>
<tr>
<td>Executive Board</td>
<td>4/14/17</td>
</tr>
</tbody>
</table>

MOVING ISSUES TO THE ARCHIVE SECTION

From within your committee Inbox, click the box(es) to the left of the Issue name(s), then at the bottom of the page click the Archive Selected Issues button.

Upon clicking the Archive Selected Issues button, you will get a popup confirming that you want to archive the issue(s). Click Ok to move or Cancel.

**MOVING ISSUES BACK TO INBOX**

To restore Issues to be viewable within their respective Inboxes, look in the Recently Archived issues section. If the Issue is not listed, click the View All link to the right of the Recently Archived issues header.

**Recently Archived Issues - Council on Planning and Budget (CPB)**

<table>
<thead>
<tr>
<th>Issue</th>
<th>SW</th>
<th>Meeting Dates</th>
<th>Internal Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Review of APM</td>
<td></td>
<td></td>
<td>9/30/17</td>
</tr>
</tbody>
</table>

For assistance, contact help@aait.ucsb.edu
On the Recently Archived issues page, click the title of the item you wish to restore, then click the Restore Issue button, at the bottom right.

UN-HIDING DOCUMENTS FROM COUNCIL/COMMITTEE VIEW

1. From within an issue click on the desired assigned council/committee level at the right.
2. Drag and drop desired document from the Documents Hidden from <council/committee name> section into the Documents Visible to <council/committee name> section.
RESPONDING TO ISSUES

1. From within the Inbox click on the issue name to which you would like to respond.

2. On the Issue Details page, the bolded council/committee on the right pane indicates the level you are currently at. If you need to change to respond from a different level, click on the appropriate corresponding link.

3. To add a response click the Add Document button within the Documents Visible to... section. Then on the Adding additional document page either: 1) drag and drop documents into the area below File Name, or 2) click the Choose File... button and select the document(s) to be uploaded, and then click the Upload button.

   a. Users may associate multiple documents with a single issue at once. Follow Step 3 to upload/drag and drop documents into the area below File Name. Once the documents appear in the window, click the corresponding checkboxes at the left of the filenames (or the box to the left of File Name to select all visible documents), and then, if there are no additional parameters to assign to the individual documents, click the Add Selected button at the bottom to associate the selected documents with the issue. If there are additional parameters (i.e. Document Types) to assign to the documents, proceed with Step 4.
Note: Microsoft Word documents uploaded into the Data Management System may automatically generate bookmarks. Automatically generated bookmarks occur when Microsoft Word documents are converted into PDF files. This is a feature associated with Microsoft Word and is not a part of the Data Management System. To delete a bookmark in a Microsoft Word document before uploading into DMS, click on the Insert tab, then click the Bookmark tab, and then select and delete any undesired bookmarks. (To delete a bookmark in a PDF file before uploading into DMS, click on the Bookmarks icon on the left panel and delete any undesired bookmarks.)

4. After uploading the response document(s), click on the name of the document.

5. On the left pane under Document, click the Document Type drop down and select whether the document is a Draft Response or a Final Response.

6. At the bottom left, click Add Document to Issue to save your response. Click Cancel to cancel adding the response.

Note: If you have uploaded more than one document to the item, you can only modify the Document Title and Document Types individually. Upon adding a document, you are directed back to the issue itself. From there, again click the Add Document button.
7. To view the document (response) uploaded, click on the document link that ends with “Response “. If Final Response had been chosen, the document link would have began with “Divisional Response “ and would be highlighted in green.

8. The next page will allow you to view the response. Additional information can be added on the left pane. Entries here are associated with the issue, not just the document.

Note: The Senate staff should come to a consensus on properly naming and categorizing items for a better search experience.
RESPONDING TO COMMITTEE LEVEL ISSUES

1. Under the **Inbox** tab click on the item to which you would like to respond.

   ![Inbox Tab](Image)

2. On the **Issue Details** page that appears, click on the appropriate council you would like to upload a response for below **Councils/Committees Assignments**. For this example, "Graduate Council" has been used.

   ![Assignments](Image)

3. To add a Graduate Council response, click on **Add Document** in the **Documents Visible to GC** section.

   ![Documents Visible](Image)

   **Note:** The Graduate Council is being used here as an example, the link for adding responses to other councils will contain their respective names.

4. Then on the **Adding additional document to Issue** page either drag and drop a document into the area below **File Name** or click the **Browse...** button and select the document. Click the **Upload** button to upload the document.

   ![Adding Document](Image)
5. After uploading the response document(s), click on the name of the document and on the next page in the left pane under Documents, change the Document Type drop down to reflect the appropriate response, and modify the Document Name as necessary. For this example we are using Final Response.

6. At the bottom left, click Add Document to Issue to add your response. Click Cancel to cancel adding the response.

7. To view the document (response) uploaded, click on GC Final Response document title, located under the Documents Visible to GC section.

VIEWING ISSUE RESPONSES BY COMMITTEE

1. From the Dashboard page (after logging in), click either on a specific committee link and then select the committee you wish to view.

   Councils & Committees (Admin)
   - Staff
   - My Councils & Committees Service History
   - Councils & Committee Volunteer Form (Admin)
   - Full Councils & Committees Roster

2. Select the year (if necessary) via the links or drop down menu at the top right. Then click the Responses in tab. The Responses tab shows a listing of all the Items that the committee has provided a response to in the selected academic year. It also provides links to other committee responses, and the divisional response, if applicable. Each response is available as a separate link (which generates a PDF). There is also a consolidated link for each item that encompasses all responses into one PDF.
MANAGING DOCUMENTS WITHIN AN ISSUE

REORDERING DOCUMENTS

Documents related to issues can be re-ordered by dragging and dropping them within the Documents Visible to … section. Changing the order here will affect the committee members view accordingly.

Note: The reordering function will only apply to the current committee view.

Tip: Click on the blank area next to the document (title) link to move the row, not on the document (title) link itself.
- Click the Save button at the bottom left of the page to save ordering. Or click the Reset button to undo all changes.
HIDING AND SHOWING DOCUMENTS

- The Documents Hidden from section below the Documents Visible to section on the “Issue Details” page can be used to hide certain documents that may not be relevant for committee members. Click and drag a document from the Documents Visible... section and drop it in the Documents Hidden... section. Multiple document can be hidden simultaneously by checking the checkboxes next to each document, and clicking on the Hide Selected Documents button.

FLAG DOCUMENTS AS NEW

- Within an Issue, new documents may be flagged as new to indicate new documents (responses, final responses, etc.) more prominently to council/committee members. Click the Flag as new button.

Select the date on which the *NEW* indicator will expire.
CREATING A MEETING INSTANCE (DATE/TIME/LOCATION)

1. Under the **Inbox** tab, click on the **Calendar Icon** to add a new meeting.
2. In the **Add meeting date** window, fill out the appropriate information based on the meeting you would like to schedule.

   ![Add meeting date](image)

   **Add multiple meeting dates**

   **Start (Required)**
   
   
   
   08/17/2017 [Calendar] 10 ▼ : 00 ▼ AM ▼

   **Duration**
   
   1 ▼ hours 0 ▼ minutes

   **Location (Required)**
   
   Conference Room

   **Comments**
   
   Discussing important things.

3. To upload an Agenda, change the **Agenda** drop down menu from **No Change** to **Upload Agenda**.

4. From there, you can upload an agenda by selecting the **Choose File** button and navigate to a file. Click the **Upload** button to then upload the document.

   ![Choose File](image)

   **Choose File  No file chosen**

5. By default, meetings will have the **Publish Contents to Committee** checked.

   ![Check](image)

   **Publish Contents to Committee**

   Adding a meeting date without checking the box will result in a warning message indicating that its contents are not published to committee members.

   ![Warning](image)

   **August 17, 2017 (Thu) 10:00 - 11:00 am**
   
   **Conference Room**
   
   **Contents Not Published to Committee**

   Note: “Preview” meetings and its contents will be available to the committee chair.

6. When all fields are completed, select the “**Add**” button at the bottom right of the window to create the meeting instance.
7. To publish a meeting, making its contents and details available to the respective committee, click its [edit] button from within the Inbox tab in Issue Management, on the left side.

Check the Publish Contents to Committee box and then click the Save button within the window.

8. To upload minutes, select the [edit] button on the top right of the meeting.
ACADEMIC SENATE DATA MANAGEMENT SYSTEM
USER’S GUIDE FOR SENATE ANALYSTS

a. Select **Upload Draft Minutes** under the **Minutes** drop down menu. Select **Choose File** to upload the file that contains the meeting minutes.

![Minutes dropdown]

- No Change
- Upload Draft Minutes
- Upload Final Minutes
- No Quorum Notice
- Cancellation Notice

b. To upload final minutes, select **Upload Final Minutes** under the **Minutes** drop down menu. Select **Browse...** to upload the approved final minutes.

![Minutes dropdown]

- Upload Draft Minutes
- Upload Final Minutes
- No Quorum Notice
- Cancellation Notice

9. When all necessary changes are completed, click the **Save** button at the bottom of the window.
1. To associate an issue with a particular meeting, drag and drop the issue from the right pane, into the meeting date on the left pane.

![Image of adding an issue to a meeting]

2. Documents associated with a meeting can be re-ordered to match the agenda/discussion order. Drag and drop the documents you would like to re-order within the specific meeting.

![Image of re-ordered documents]

3. Click **Save** at the bottom left of the page to save all documents that have been associated and/or re-ordered.

**Note:** Changing the order here will affect the committee members view accordingly.
MANAGING ATTENDANCE

1. From the Dashboard, simply click on the committee holding the meeting. To manage the attendance of the meeting, click on the Attendance Icon located to the right of the meeting instance under the Upcoming Meetings or Past Meetings tab.

2. The following page will allow people associated with a committee to be marked as Present, Absent, Excused or N/A (N/A is selected by default). The status you have selected for a person will be highlighted in white.

3. Non-voting members of a committee will have grey and italicized names. Although their attendance status can be recorded, it is not calculated as part of the total count.

4. The Attendance Notes section below the list and above the Update Attendance button is available for additional notes pertinent to the meeting (i.e. recording alternate attendees for a committee member).

5. Click the Update Attendance button at the bottom of the page to save your selections.

6. A yellow box at the top of the page summarizing meeting attendance of voting members will appear.

7. Once attendance has been recorded, the meeting will contain the number of voting members present, out of the number of voting members in the committee.

For assistance, contact help@aait.ucsb.edu
8. Also of note within the Attendance section of a meeting are three icons at the top right of the member list:

   a. The printer icon – this allows the user to view a printable version of the meeting.
   b. The clock icon – this allows the user to view the committee attendance history.
   c. The mail icon – this allows the user to draft an email (including each member of the committee) that includes a shortcut to the council page. If this option is used at a council or committee level, the members will be included in the “To:” field and the supporting Senate Analyst in the “CC:” field.

9. To view committee attendance history, click on the Attendance icon under the Inbox tab in Issue Management. The committee attendance page can be used to view overall committee attendance, rather than individual meetings.

10. The committee attendance history page contains a table with various details regarding attendance for meeting dates and people associated with a committee. The meeting dates for a committee are located along the top of the table. Each date is a link to the attendance page for that specific meeting. The table columns are Total Present (+), Total Absent (-), Total Excused (x), and Attendance %; each cumulative totals for members of the committee. The colored flags give a visual layout of attendance for each person in the committee and the corresponding meeting. A green plus sign represents In Attendance, a red minus sign represents Not In Attendance, a yellow X represents Excused, and a blank represents N/A.

<table>
<thead>
<tr>
<th>Date</th>
<th>Total Present (+)</th>
<th>Total Absent (-)</th>
<th>Total Excused (x)</th>
<th>Attendance %</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/20</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>11/3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>1/26</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>2/23</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>3/9</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>3/23</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>4/6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>4/20</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>5/4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>8/17</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

11. The bottom of the table contains attendance details for voting members of a committee that correspond with meeting dates. Non-voting members will have grey and italicized names (Representatives, Ex-officios, Consultants, etc.), and are not calculated as part of the total count.
12. Below the attendance table, there is a link to download the results as a spreadsheet. Click the Download spreadsheet version link to save the results as a spreadsheet.

<table>
<thead>
<tr>
<th>Attendance Notes</th>
<th>10/20</th>
<th>11/3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voting Present</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Voting Absent</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Voting Excused</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Voting %</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

* Voting

Download spreadsheet version

Note: When clicking the link, and depending on your browser settings, you should be prompted to Save As or to Open the file. The file will save as “attendance-overview.xlsx”.

For assistance, contact help@aait.ucsb.edu
ADDITION REFERENCE MATERIALS

Under the Inbox tab, the Reference Materials section can be used to add documents that may be pertinent to a committee throughout the year. The Reference Materials section typically contains documents intended for general committee use and are not necessarily associated with a particular meeting.

1. To add a reference, first create a new issue (see “Creating Systemwide, Divisional, or Committee-Level Issue” section).
2. Drag and drop the newly created issue from the Issue pane into the Reference Materials field, located at the bottom of the lefthand Meetings section.

3. Click Save at the bottom left of the page to save all references that have been added.

4. From within the DMS (admin) section, you can jump to referenced items in the Inbox tab by clicking on the Reference Materials icon. This will automatically scroll through the meetings and bring the Reference Materials section to the top.

5. From the Dashboard, referenced documents will appear in the Reference Materials section, below the Upcoming Meetings/Past Meetings section(s), for committee members to view.

For assistance, contact help@aait.ucsb.edu
SEARCH FEATURES

The search functions allows users to search for documents, issues and responses within the data management system.

1. From within Issue Management, click the Search tab at the upper left of the page.

2. The next page will provide various fields used to assist in narrowing down your search.

3. The search fields can be used in conjunction with, or independently from, each other to make a search more or less specific. Similarly, a multitude of Keywords, Categories, References, Years, Units and Committee Assignments can be used to further refine the results. Start by typing the desired Keyword, Category, Year, Unit or Committee Assignment into the respective field(s). When the search has been recognized within the data management system, the various options will be displayed below the field. Select (by clicking on) the option that best matches your search.

4. The selection will now appear below the field, outlined in blue. Select multiple criteria for the same field by searching and selecting another option.

5. To remove search criteria, simply click the white X.
6. Selecting the All option to the right of the various search fields restricts the search to documents containing the entire search criteria defined below the field in blue. Selecting the Any option, allows the search to pull results that contain one OR all of the search criteria defined below the field in blue.

7. When you have finished entering all of your desired search criteria, click the Search button at the bottom left of the page.

ADDITIONAL SEARCHING/FILTERING FOR ISSUES

1. From within your DMS Inbox, ensure you have the appropriate council/committee selected from the dropdown.

2. In the box to the right of the dropdown, you can narrow the list of issues being displayed by searching for issue titles.

3. To clear your search/filter, simply delete any text from within the box or click on the “Clear Search Filter” link.

EDITING KEYWORDS

1. To edit a keyword, click on the issue/document in which the keyword appears. (You can do a search for that particular keyword, then click on the issue to bring up the “Document details” page).

For assistance, contact help@aait.ucsb.edu
2. On the “document details” page, drag and drop the keywords outlined in blue located below the Keywords field into the field that says *Drop Here to Edit Keyword* at the bottom of the screen (next to the *Save Changes* and *Reset* buttons). This field will only appear when the original keywords outlined in blue are clicked and dragged.

![Keywords field and Drag to Drop](image)

3. This will bring up a window allowing you to correct the spelling and capitalization. The *Spelling Correction* and *Capitalization Correction* fields must match. The spelling correction will cross-check all instances of the keyword within the system, and apply the appropriate corrections.

![Edit Keyword window](image)

4. When changes are being made, you will be prompted to click the correct spelling below the field. This will ensure both the *Capitalization Correction* field and the *Spelling Correction* field match.

![Spelling Correction field](image)

5. Click the **Submit** button at the bottom right of the window to save all changes. This will correct all of the associations.

For assistance, contact help@aait.ucsb.edu
6. A window will appear asking you to double check all changes. Click **OK** to accept changes.
1. Similarly to the Categories list on the Search page, there now exists a Keywords list.

<table>
<thead>
<tr>
<th>Keyword</th>
<th>Download Keywords List</th>
</tr>
</thead>
<tbody>
<tr>
<td>APM</td>
<td></td>
</tr>
<tr>
<td>Awards</td>
<td></td>
</tr>
<tr>
<td>Bylaw</td>
<td></td>
</tr>
<tr>
<td>Campus Calendar</td>
<td></td>
</tr>
<tr>
<td>Childcare</td>
<td></td>
</tr>
<tr>
<td>Commencement</td>
<td></td>
</tr>
<tr>
<td>Department Bylaws</td>
<td></td>
</tr>
<tr>
<td>discipline</td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td></td>
</tr>
</tbody>
</table>

2. Clicking on a keyword from the list serves to automatically add that as a parameter in your search (at the left), and return associated items.

<table>
<thead>
<tr>
<th>Keyword</th>
<th>Download Keywords List</th>
</tr>
</thead>
<tbody>
<tr>
<td>APM</td>
<td></td>
</tr>
<tr>
<td>Awards</td>
<td></td>
</tr>
</tbody>
</table>

   (1 Results)

<table>
<thead>
<tr>
<th>Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systemwide Review APM-285_210-3_133_and_740</td>
</tr>
</tbody>
</table>
MANAGING PROFESSIONAL NAMES

If a faculty or staff member prefers to go by a different professional name than what is listed in the UCI directory, the Professional Name Management tool can be used to change the appearance of their name in the Academic Senate membership lists.

1. From the Dashboard, Under Administration > Management, click Professional Name Management

2. Under the “Search for user…” field, enter the name of the user that you would like to edit.

3. Select the desired person by clicking on the Select link to the left of their name.

Search for user to edit the professional name:

<table>
<thead>
<tr>
<th>Select</th>
<th>Smith, Thomas Bates</th>
<th><a href="mailto:thbsmith@ucla.edu">thbsmith@ucla.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Smith, Desmond</td>
<td><a href="mailto:dsmith@mednet.ucla.edu">dsmith@mednet.ucla.edu</a></td>
</tr>
<tr>
<td>Select</td>
<td>Smith, Laurence</td>
<td><a href="mailto:lsmith@geog.ucla.edu">lsmith@geog.ucla.edu</a></td>
</tr>
<tr>
<td>Select</td>
<td>Smith, Roberts A</td>
<td><a href="mailto:robertss@ucla.edu">robertss@ucla.edu</a></td>
</tr>
</tbody>
</table>

For assistance, contact help@aait.ucsb.edu
4. Fill out the appropriate fields to edit the name as the faculty/staff members’ desires. Click **Update Professional Name** when finished.

Search for user to edit the professional name:

<table>
<thead>
<tr>
<th>Professional</th>
<th>Imported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Monica Smith</td>
</tr>
<tr>
<td>First Name:</td>
<td>Monica</td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td>Smith</td>
</tr>
<tr>
<td>Email:</td>
<td><a href="mailto:help@aait.ucsb.edu">help@aait.ucsb.edu</a></td>
</tr>
<tr>
<td>UCLAnetID:</td>
<td></td>
</tr>
</tbody>
</table>

Update Professional Name

**Note:** Editing a professional name will only change the appearance of the name within the Academic Senate data management webpage. Changes within the Professional Name Management tool will not modify the name under your official University’s Directory.
MANAGING MEMBERS OF A COMMITTEE

1. To manage the members of a committee, subcommittee, board, or council, select the Committee Management tool under Administration > Management.

2. At the top of the page, select the committee drop down menu to select the committee who’s membership you would like to edit.

For assistance, contact help@aait.ucsb.edu
3. Add members to a committee by clicking on the “Add Members” link.

Add Members
There are no members currently associated with this committee

4. A new window will pop up, Select the position for the new member by clicking on the drop down under “Select Position,” Then enter the members name in the “Search for User by …” field and select the user you wish to add. Click the “Add” button located on the bottom right when you are done.

5. The person will now be added to the roster under the selected Committee. To edit the person’s Position, Start Date, End Date, and Capacity select the Edit Members link.

Note: The columns are sortable. Click on the heading to sort by that column. Click again to sort by descending order.

6. Within the Edit Member window, changes to the Position, Start and End Date and Capacity can be made.
   a. Position: the person’s role (Chair, Member, Representative, Consultant, Ex Officio, etc.) within the committee, subcommittee, council or board.
   b. Start Date: date the person assumes their position within the committee.
   c. End Date: date the person ends their position within the committee.
   d. Affiliation: the capacity that someone is serving under.
7. When all necessary changes have been made, click the **Save Changes** button at the bottom left.

**Note:** A user’s position is tied to the start and end date of their appointment to the committee. If a user was a “Member” last year, but is now a “Chair”, their “Member” appointment must be ended, and their “Chair” appointment must be started. For positions that end mid-term, an end date will be displayed.
MANAGING A DEPARTMENT NAME

1. Under Administration > Management select the Department Name Management tool.

2. Search for the department you would like to format by scrolling through the list or by pressing CTRL + F on the keyboard. A field will appear at the top of the webpage that will allow departmental or departmental code searches.

3. Once you have found your desired department, you can change how the formatting of the name will appear on the Academic Senate roster lists by entering the name and formatting of the department into the Formatted field to the right of the department. Save the formatting changes you have made by clicking out of the field or pressing Enter/Return on your keyboard.

Note: You may also choose to have the department name hidden by checking or unchecking the Hidden box displayed to the left of the department name.
CONVERTING A PDF PORTFOLIO INTO A NORMAL PDF

PDF Portfolio format does not work with the DMS. Please convert PDF Portfolio documents to a standard PDF document before uploading into the DMS.

1. Launch Adobe Acrobat and open the PDF Portfolio you would like to convert.
2. In the top left corner click on File, then Combine Files into a Single PDF.

3. Click on Add Files... in the upper left of the Combine Files dialog and select Add Files...

4. Navigate to and select the PDF Portfolio you want to convert into a single PDF. Click Open to add files.

5. You will see an alert File [file's name] is a PDF Portfolio that contains multiple files. The files within the PDF Portfolio have been added to the file list. Click OK to dismiss this dialog. The files within the PDF Portfolio (both PDF and non-PDF) will be displayed in the file list. Non-PDF files will also be converted.
6. Reorder files as desired by clicking the Move Up or Move Down buttons or dragging and dropping the files in the desired order.

7. Click Combine Files when you are ready to merge the files into a single PDF. You will see a progress bar as the files are merged. The resulting file will be named Binder [#] which can be changed when you save the file.

8. Save the resulting file by going to File, Save As, PDF... and save it in your desired location.