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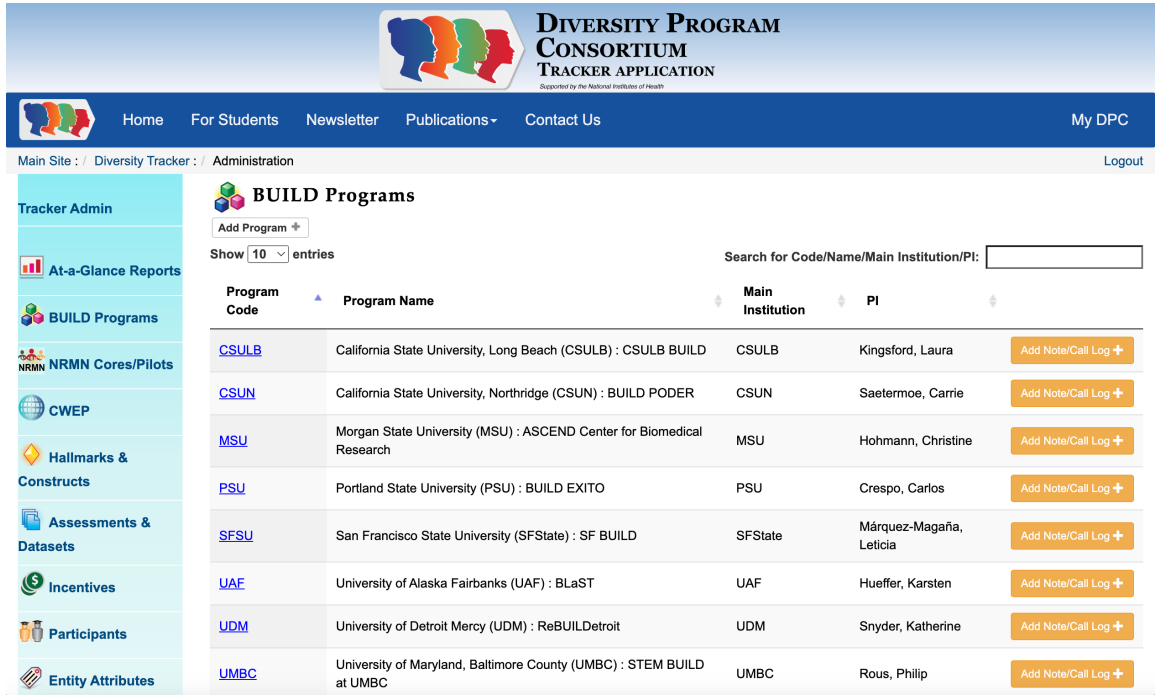
CTRL Tracker Lite Suite

An open-source, lightweight customer relationship management system (CRM)

Verónica De La Cruz

Motivation

- We first designed this conceptual model to accommodate the project Diversity Program Consortium (NIH Common Fund).
- UCLA's role was to coordinate and evaluate the longitudinal effects on students who participated in any of the supported colleges and universities activities.
- UCLA responsible for collecting data and "tracking" students over 10 years and measure the level of program exposure.



CTRL Tracker Lite: What is it?

The Tracker Lite is a flexible core set of entities and functionality upon which we have built several lightweight customer relationship management (CRM) applications.

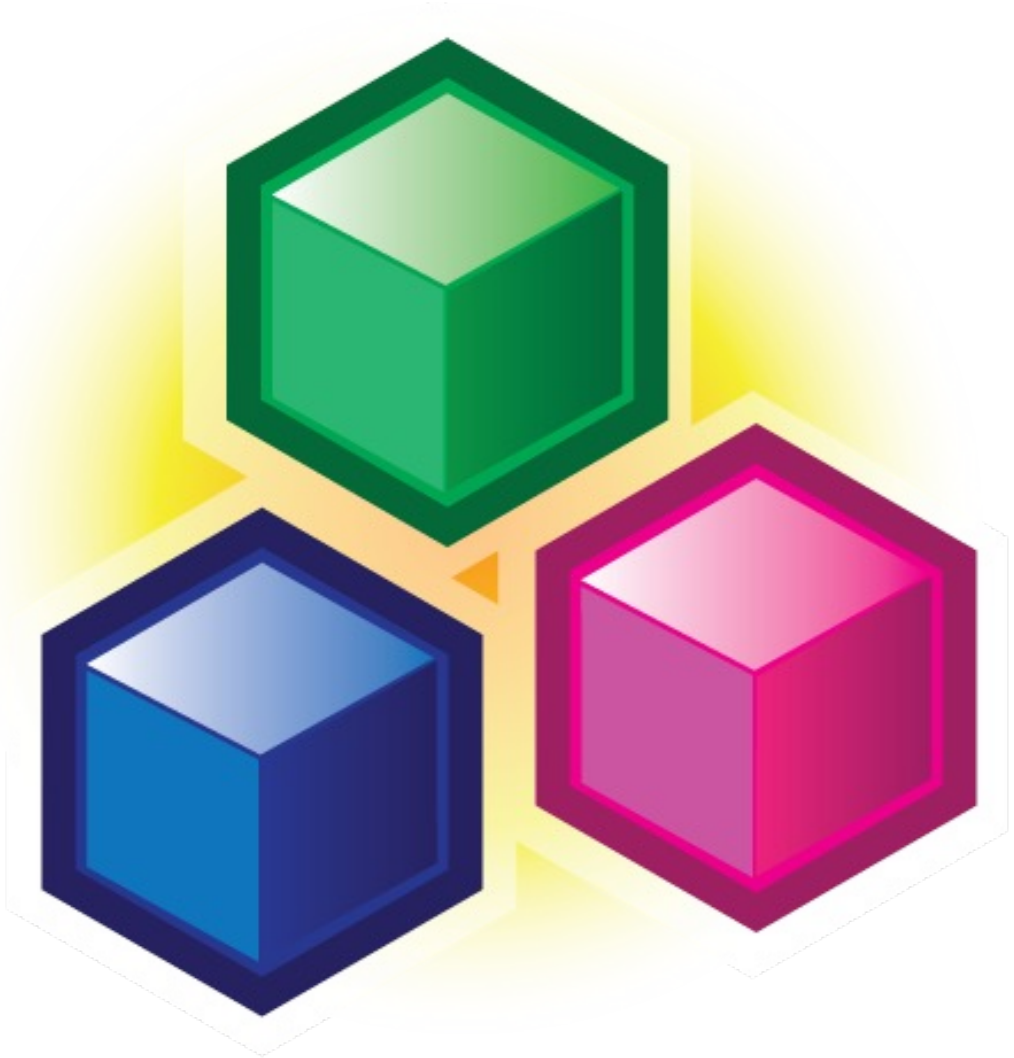
The Tracker Lite is generalized and updated to the OpenACS 5.10 standards and preserves the core CRM-like functionality of the original Tracker without the intricate details of the original Diversity project.

All core entities are *acs_objects* which enables the use of permissions, *acs_rels* and the rest of *acs_objects* advantages accordingly.

In addition, we have made efforts to generalize the Tracker Lite by using OpenACS message keys to make it easier to adapt to different needs.

Core Entities: Programs

- Programs are the main entity that model the services provided to the participants (client).
- Every program can have several activities associated to it.
- Every program can have several participants associated to it (which are associated via the activity sessions)

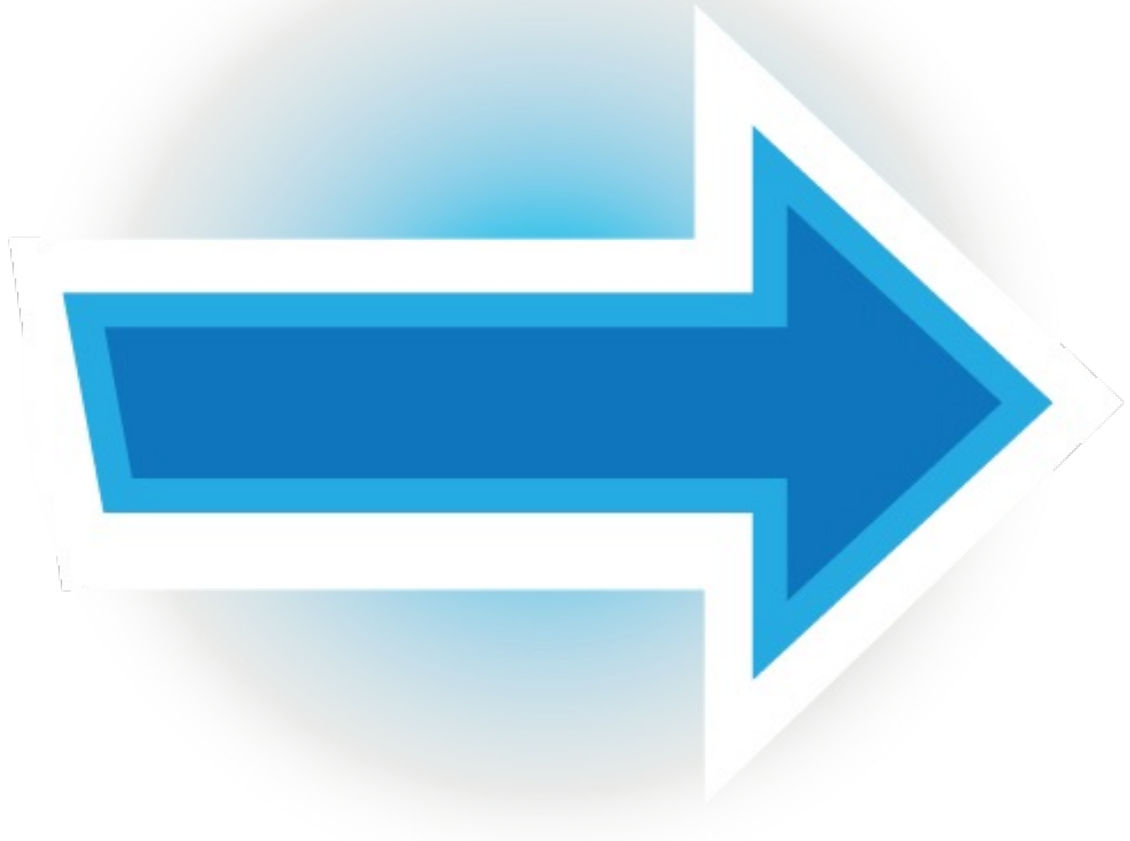


Core Entites: Activities

- Activities comprise the services that programs deliver (the what).
- Every activity can have several activity sessions associated to it.

Core Entities: Activity Sessions

- These events are instances of an activity class (the when)
- Participants may be enrolled to the activity session manually or using a roster file or scanning a QR code.
- Sessions keep track of when participant was enrolled and the enrollment status.



Core Entities: Participants

- These entities receive services from programs.
- Participants are acs users that can be associated to programs via activity sessions.
- Participants have a basic demographic information that can be extended.
- Participants may have associated different contact data such as:
  - Addresses
  - Emails
  - IDs
  - Phones

Example Applications of CTRL Tracker Lite

1. Outreach and Pathway Website

Office of Outreach and Pathway Programs at the UCLA David Geffen School of Medicine (DGSOM)

2. Department Faculty Tracker CRM

UCLA Health Information Technology

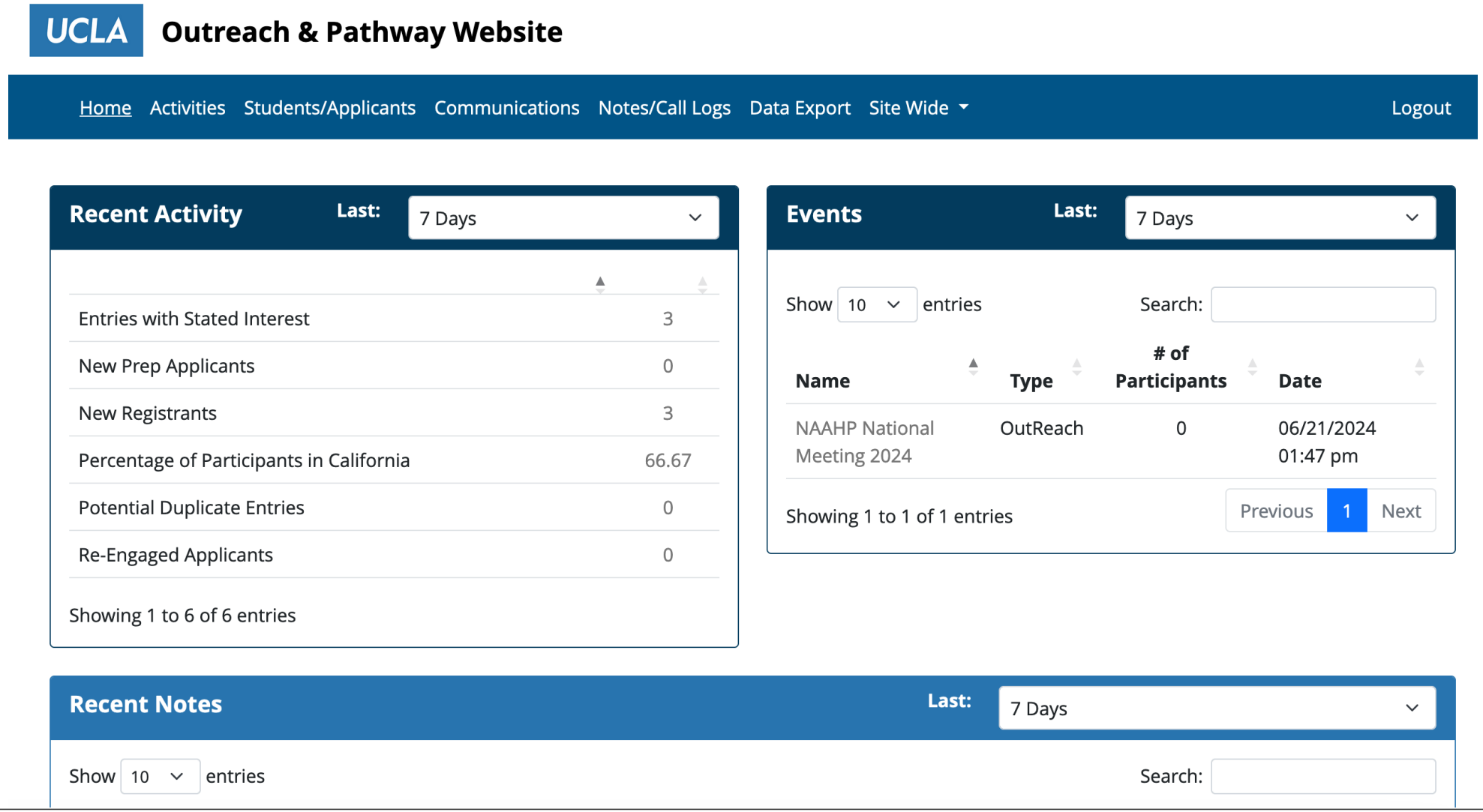
Office of Outreach and Pathway Programs at the UCLA David Geffen School of Medicine (DGSOM)

The ctrl tracker lite was utilized to develop a CRM system to modernize and enhance the everyday operations at the office.

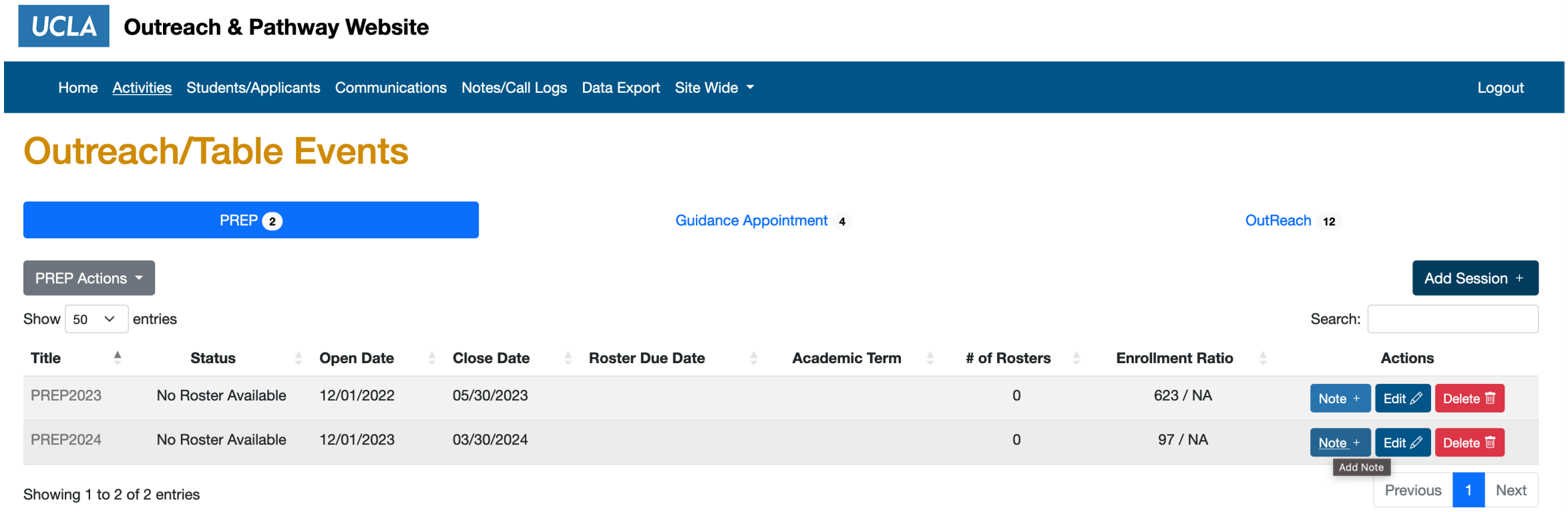
The Outreach office coordinates events for students. Students are enrolled to events (requirement, track student enrollment) and the events are classified by different categories.

The core object entities in our design are “participants aka students” “activities aka events types” and “activity sessions – aka events”.

Outreach and Pathway Website



Activities


UCLA Outreach & Pathway Website
Home Activities Students/Applicants Communications Notes/Call Logs Data Export Site Wide Logout
Outreach/Table Events
PREP 2
Guidance Appointment 4
OutReach 12
PREP Actions
Add Session +
Show 50 entries
Search:
Title Status Open Date Close Date Roster Due Date Academic Term # of Rosters Enrollment Ratio Actions
PREP2023 No Roster Available 12/01/2022 05/30/2023 0 623 / NA Note + Edit Delete
PREP2024 No Roster Available 12/01/2023 03/30/2024 0 97 / NA Note + Edit Delete
Add Note
Showing 1 to 2 of 2 entries
Previous 1 Next

Events

Outreach/Table Events : PREP Event - PREP2023

PREP2023 DETAILS

Title: PREP2023
Open Date: 12/01/2022
Close Date: 05/30/2023
Status: No Roster Available
Roster Required: No

Roster Due Date:
Expected Enrollment:
Head Count:
Hashtags:
Academic Term:

Edit | RFP Config | Delete

STUDENTS/APPLICANTS 623 | UPLOADED ROSTERS | NOTES 1 | NOTIFICATIONS | EMAILS 5568

Actions

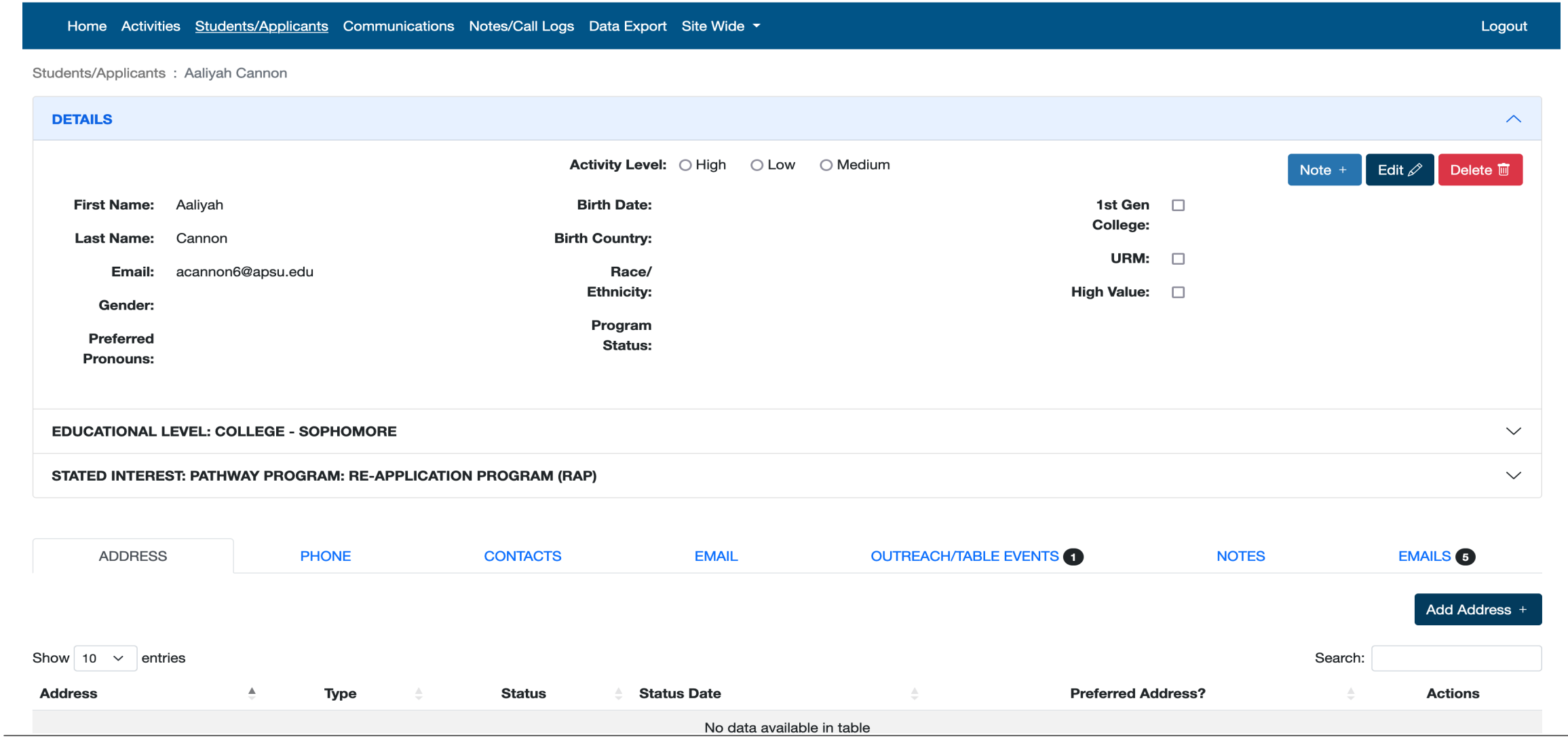
Not Submitted 388 | Submitted 42 | Complete 193

Send Bulk Email

Show 50 entries Search:

First Names	Last Name	Email	Application Date	Application Status	Comments	Actions
.	.	g@gmail.com	12/08/2022 09:57 pm	Not Submitted		Send Email / Edit / Delete
a	b	b@gm	12/20/2022 10:58 pm	Not Submitted		Send Email / Edit / Delete

Participants

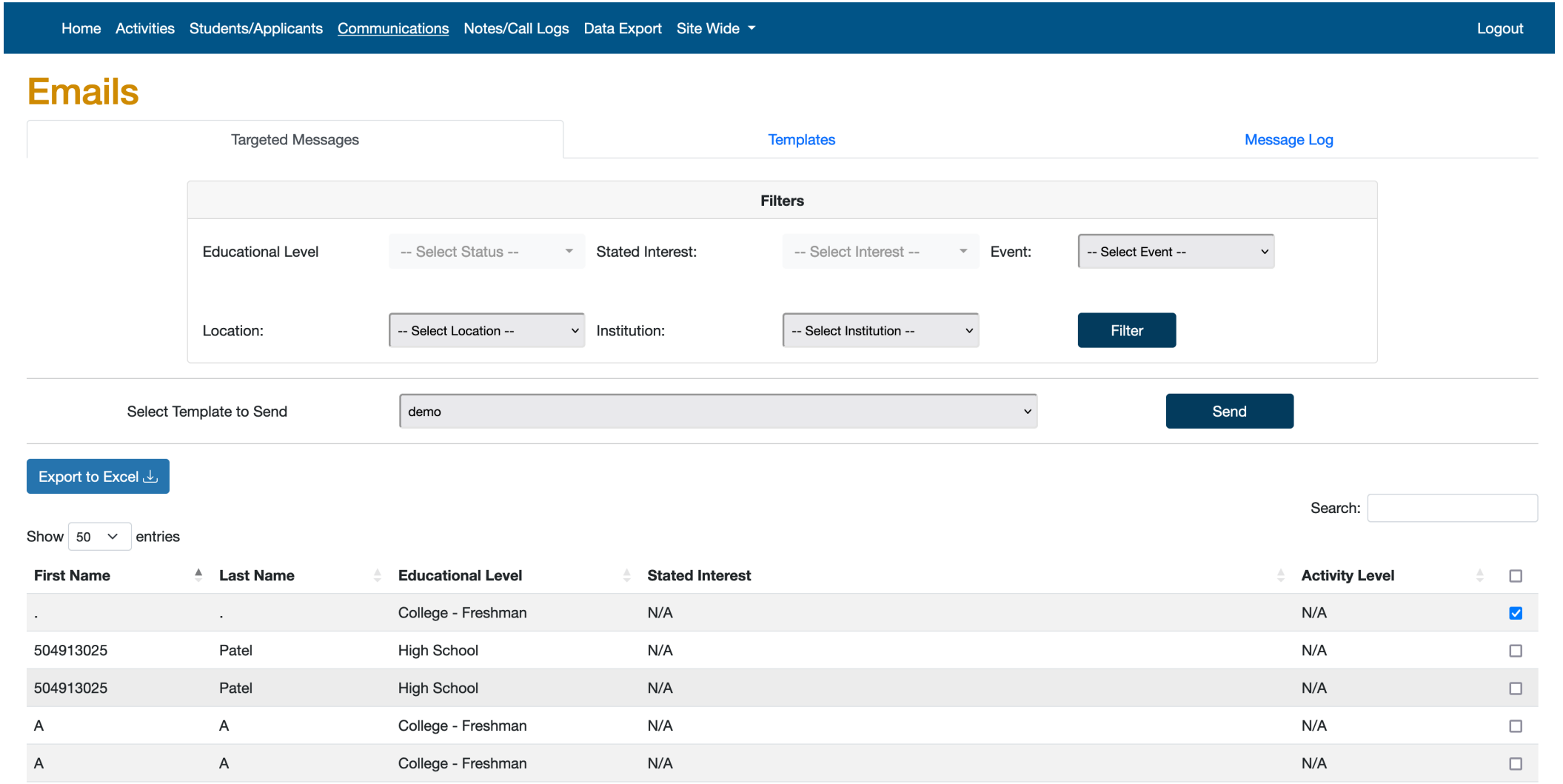


Targeted Messages

This functionality enables the use of the collected and tracked data of the participant (demographic data, activities and event data) in order to target participants and send tailored communications.

We have a catalog of email templates that are used to build the email body and subject

Targeted Messages



Faculty Tracker: Conceptual fit to the ctrl tracker lite suite of packages in the OpenACS

DGIT is an organization that has several units that provide services to a broad group of researchers and educators.

DGIT as a program

- DGIT Units are part of the network which makes up the program.

- Researchers and faculty are participants.
- Service provided by DGIT are activities
- Each round of service offering is a session of an activity

Faculty Tracker: Dashboard

DGIT Infrastructure

HOME | REQUEST SERVICES | TRAINING & WORKSHOPS | PEOPLE | COMMUNICATION | NOTES/CALL LOGS | DATA EXPORT

Recent Requests

Last: 7 Days

# Requests	1
# Requests Verified	0
New Requests	0

Recent Events/Trainings

Last: 7 Days

Event	Type	# of Participants	Date
No matching records found			

Recent Notes

Last: 7 Days

Show 10 entries Search:

Label	Note/Call Log Type	Note/Call Log	Author	Note/Call Log Date	Actions
No data available in table					

Showing 0 to 0 of 0 entries Previous Next

Faculty Tracker: Request Services

DGIT Infrastructure

HOME | REQUEST SERVICES | TRAINING & WORKSHOPS | PEOPLE | COMMUNICATION | NOTES/CALL LOGS | DATA EXPORT

Filters

Since: All Time

Service: -- Select service --

Status: -- Select status --

Filter | Clear

Show 50 entries

Search:

Requester	Service Title	Status	Requested By	Request Date	Actions
CTRL Lab	Free Storage Service 2025	Needs Review	Adrian Ferenc	07/01/2024	View Request Details

Showing 1 to 1 of 1 entries

Previous 1 Next

Faculty Tracker: Request Services

DGIT Infrastructure

HOME | REQUEST SERVICES | TRAINING & WORKSHOPS | PEOPLE | COMMUNICATION | NOTES/CALL LOGS | DATA EXPORT

Name: CTRL Lab

Email:

Requester Type: Lab

PI First Name: Ctrl

PI Last Name: Lab

Department: 1567

FAU Manager:

FAU Manager Email:

MEMBERS | REQUESTS | NOTES/CALL LOGS

Show 50 entries Search:

Service Title	Creation Date	Requested By
Free Storage Service 2025	07/01/2024	Adrian Ferenc

Developed by DGIT | CTRL

Faculty Tracker: Targeted Communications

DGIT Infrastructure

HOME | REQUEST SERVICES | TRAINING & WORKSHOPS | PEOPLE | COMMUNICATION | NOTES/CALL LOGS | DATA EXPORT

Filters

Service: -- Select Service --

Requester Type: -- Select Requester Type --

Include Only Those Who Have Made Requests: No

Filter | Clear

Select Template to Send -- Select Template -- Send

Show 50 entries Search:

Name	Requester Type	Email	
Rebecca Gitlin	Person	rgitlin@dmh.lacounty.gov	☐
Ryan Bedi	Person	ryanbedi@ucla.edu	☐
Mahbod Jafarvand	Person	mjafarvand@ucla.edu	☐
Maya Segal	Person	msegal@mednet.ucla.edu	☐

Thank You!