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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.

The screenshot displays the 'DIVERSITY PROGRAM CONSORTIUM TRACKER APPLICATION' interface. The header includes a logo with four colored silhouettes (blue, orange, green, red) and the text 'DIVERSITY PROGRAM CONSORTIUM TRACKER APPLICATION' with a sub-note 'Supported by the National Institutes of Health'. A navigation bar contains links for 'Home', 'For Students', 'Newsletter', 'Publications', 'Contact Us', and 'My DPC'. Below the navigation bar, the main content area is titled 'BUILD Programs' and features a search bar and a table of program entries. The table has columns for 'Program Code', 'Program Name', 'Main Institution', and 'PI', with an 'Add Note/Call Log' button for each row.

| Program Code | Program Name | Main Institution | PI | |
|-----------------------|---|------------------|-------------------------|-----------------------------------|
| CSULB | California State University, Long Beach (CSULB) : CSULB BUILD | CSULB | Kingsford, Laura | Add Note/Call Log |
| CSUN | California State University, Northridge (CSUN) : BUILD PODER | CSUN | Saetermoe, Carrie | Add Note/Call Log |
| MSU | Morgan State University (MSU) : ASCEND Center for Biomedical Research | MSU | Hohmann, Christine | Add Note/Call Log |
| PSU | Portland State University (PSU) : BUILD EXITO | PSU | Crespo, Carlos | Add Note/Call Log |
| SFSU | San Francisco State University (SFSState) : SF BUILD | SFSState | Márquez-Magaña, Leticia | Add Note/Call Log |
| UAF | University of Alaska Fairbanks (UAF) : BLaST | UAF | Hueffer, Karsten | Add Note/Call Log |
| UDM | University of Detroit Mercy (UDM) : ReBUILDetroit | UDM | Snyder, Katherine | Add Note/Call Log |
| UMBC | University of Maryland, Baltimore County (UMBC) : STEM BUILD at UMBC | UMBC | Rous, Philip | Add Note/Call Log |

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.

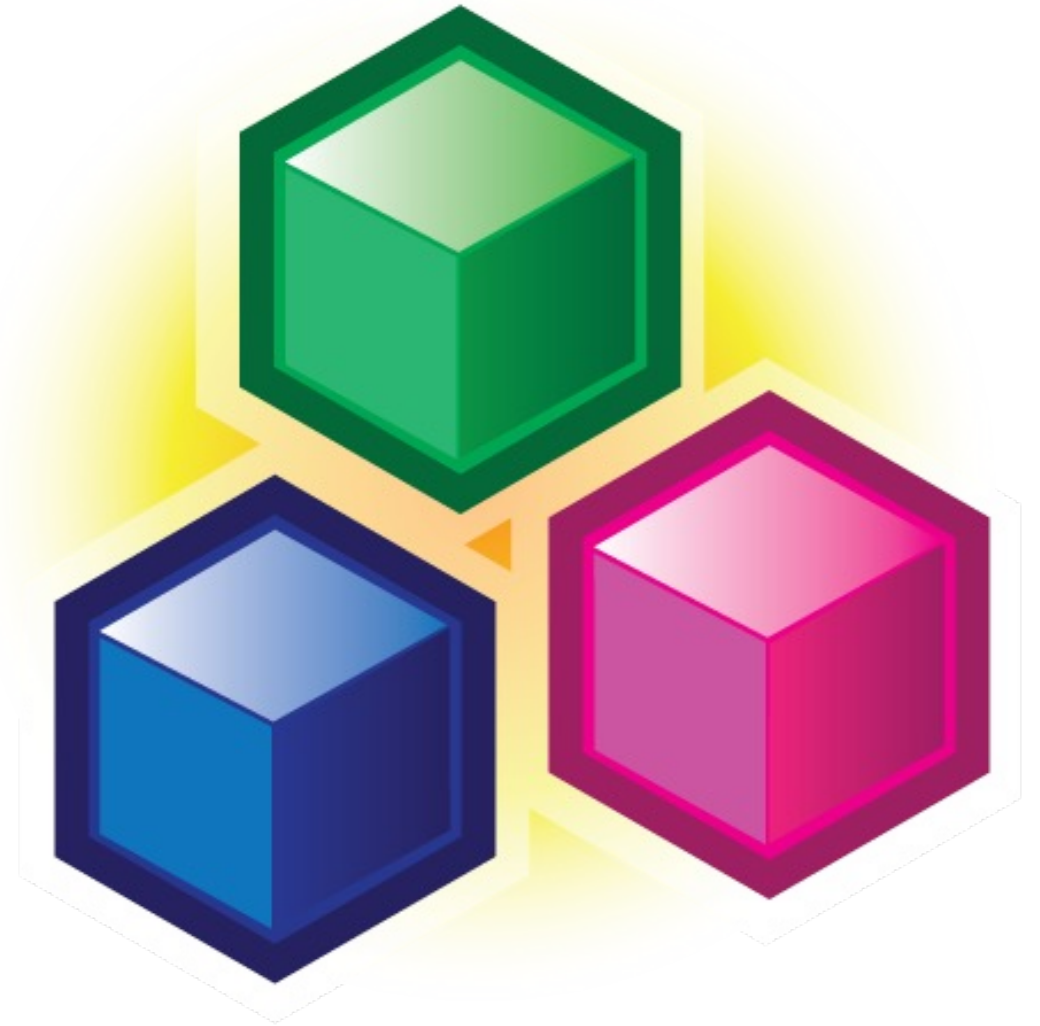


All core entities are *acs_objects* which enables the use of permissions, *acs_rels* and the rest of *acs_objects* advantages accordingly.

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

UCLA Outreach & Pathway Website

[Home](#) [Activities](#) [Students/Applicants](#) [Communications](#) [Notes/Call Logs](#) [Data Export](#) [Site Wide](#) ▾

[Logout](#)

Recent Activity

Last:

7 Days ▾

| | |
|--|-------|
| Entries with Stated Interest | 3 |
| New Prep Applicants | 0 |
| New Registrants | 3 |
| Percentage of Participants in California | 66.67 |
| Potential Duplicate Entries | 0 |
| Re-Engaged Applicants | 0 |

Showing 1 to 6 of 6 entries

Events

Last:

7 Days ▾

Show 10 ▾ entries

Search:

| Name | Type | # of Participants | Date |
|-----------------------------|----------|-------------------|------------------------|
| NAAHP National Meeting 2024 | OutReach | 0 | 06/21/2024 01:47 pm |

Showing 1 to 1 of 1 entries

Previous 1 Next

Recent Notes

Last:

7 Days ▾

Show 10 ▾ entries

Search:

Activities

UCLA Outreach & Pathway Website

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 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

Students/Applicants : Aaliyah Cannon

DETAILS



Activity Level: High Low Medium

Note + Edit Delete

First Name: Aaliyah

Birth Date:

1st Gen

Last Name: Cannon

Birth Country:

College:

Email: acannon6@apsu.edu

Race/

URM:

Gender:

Ethnicity:

High Value:

Preferred
Pronouns:

Program
Status:

EDUCATIONAL LEVEL: COLLEGE - SOPHOMORE



STATED INTEREST: PATHWAY PROGRAM: RE-APPLICATION PROGRAM (RAP)



ADDRESS

PHONE

CONTACTS

EMAIL

OUTREACH/TABLE EVENTS 1

NOTES

EMAILS 5

Add Address +

Show 10 entries

Search:

| Address | Type | Status | Status Date | Preferred Address? | Actions |
|---------|------|--------|-------------|--------------------|---------|
|---------|------|--------|-------------|--------------------|---------|

No data available in table

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

Emails

Targeted Messages

Templates

Message Log

Filters

Educational Level: Stated Interest: Event:

Location: Institution:

Select Template to Send

demo

Search:

Show entries

| First Name | Last Name | Educational Level | Stated Interest | Activity Level | <input type="checkbox"/> |
|------------|-----------|--------------------|-----------------|----------------|-------------------------------------|
| . | . | College - Freshman | N/A | N/A | <input checked="" type="checkbox"/> |
| 504913025 | Patel | High School | N/A | N/A | <input type="checkbox"/> |
| 504913025 | Patel | High School | N/A | N/A | <input type="checkbox"/> |
| A | A | College - Freshman | N/A | N/A | <input type="checkbox"/> |
| A | A | College - Freshman | N/A | N/A | <input type="checkbox"/> |

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 entriesSearch:

| 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 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:

Requester Type:

Include Only Those Who Have Made Requests:

Select Template to Send

Show entries

Search:

| Name | Requester Type | Email | |
|------------------|----------------|--|--------------------------|
| Rebecca Gitlin | Person | rgitlin@dmh.lacounty.gov | <input type="checkbox"/> |
| Ryan Bedi | Person | ryanbedi@ucla.edu | <input type="checkbox"/> |
| Mahbod Jafarvand | Person | mjafarvand@ucla.edu | <input type="checkbox"/> |
| Maya Segal | Person | msegal@mednet.ucla.edu | <input type="checkbox"/> |

Thank You!