

Academic Personnel Data Management System

User Manual

Academic Personnel Services

Version 1.0

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Accessing AP Data

In order to access *AP Data*, you must be registered for UCSD's Single Sign-On (SSO), UCSD's authentication system for campus business systems. If you are not yet registered, instructions for registering are available on Blink at: <http://blink.ucsd.edu/technology/network/access/business-systems/access.html>

You also need to be assigned a "role" in AP On-line *Review* (see below), which determines tasks you can perform and which screens you can see.

Once you are registered for Single Sign-On and have been assigned a role, you can log on to *AP Data* at: **PLACE URL HERE**

Links to other Academic Personnel On-Line applications are also available on the [Academic Personnel Services home page](#).

Assignment of roles in AP Data

The role you are assigned in AP On-Line *Review* determines which tasks you can perform and which screens you can see.

Department Security Administrators (DSAs) are responsible for assigning the roles of Department Chair, Department Staff, Dean, and Dean Staff.

The roles relevant to AP Data are listed below.

Department Staff: The role assigned to department academic personnel staff. More than one person in a department may be assigned this role. Department staff can only access records and run reports for individuals associated with their assigned unit(s). Department staff have read access to the Employee data screen and limited editing permissions on the Unit 18 data screen.

Department Chair: The role assigned to the actual Department Chair. Department Chairs may only access records and run reports for individuals associated with their assigned unit. Department Chairs have read access to the Employee data screen and limited editing permissions in the Unit 18 data screen.

Dean Staff: The role assigned to Deans' staff members responsible for academic personnel affairs. Dean staff can run reports for individuals associated within their assigned division and have global access to the data entry screens. More than one person in a Deans' office may be assigned this role.

Dean: The role assigned to the actual Dean. The Dean can run reports for individuals associated within their assigned division and have global access to the data entry screens.

CAP Staff: The role assigned to Academic Senate personnel who assist the Committee on Academic Personnel. CAP staff have read only global access to the data entry screens.

APO: The role assigned to Academic Personnel Services staff members. APO staff have global access to the data entry screens and reporting. More than one person in Academic Personnel Services may be assigned this role.

How to get additional assistance with AP Data

If you have general questions regarding academic personnel policy, please contact your divisional dean's office.

If you have questions regarding technical issues or error messages in *AP Data* please contact Academic Technology Services (ATS), ats@ucsd.edu

To submit general questions, feedback, suggestions for improvements or future enhancements, please contact Brandy Cheshire, bmisquez@ucsd.edu

Section 1: Academic Employee Report Tool


This tool provides the capability to run ad-hoc and canned reports on current academic personnel within your assigned unit(s). Enhanced reporting features will be introduced in future phases.

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Academic Employee Report

Reports AP Admin

You may use this report for general information on academic employees in your unit(s). The information displayed in this report comes from PPS, so any errors should be corrected there.

Records displayed with a gold background exist in PPS, but corresponding records do not exist in the APOL database. You may click the "Add" link to add an employee to the APOL database. Click "View" to see the data currently stored in the APOL database for that employee. An initial check will be done to see if any changes have been made to that person's PPS record, and any updates will be automatically made in the APOL database. You may experience a slight delay while this validation occurs.

Report:

Unit:

Academic Group:

<input type="checkbox"/> Regular Teaching Faculty - Ladder Ranks	<input type="checkbox"/> Other Faculty	<input type="checkbox"/> Librarians
<input type="checkbox"/> Regular Teaching Faculty - Acting Ranks	<input type="checkbox"/> Administrative Titles	<input type="checkbox"/> Researchers
<input type="checkbox"/> Lecturers with (Potential) Security of Employment	<input type="checkbox"/> Other Academic Personnel and Pay Codes	<input type="checkbox"/> Cooperative Extension
<input type="checkbox"/> Unit 18	<input type="checkbox"/> Student Assistants	<input type="checkbox"/> University Extension

Report Options:

Title:

Rank:

Career Status:

- Show only employees missing from APOL database (highlighted in gold)
- Show only employees in selected home department
- Show Senate titles only
- Show salary information
- Show reviews due
- Show hire date
- Show only Unit 18 lecturers eligible for mentor meeting
- Show only Unit 18 lecturers missing mentor meeting status
- Show only Unit 18 lecturers missing non-reappointment reason
- Show only Unit 18 lecturers eligible for 10th quarter salary increase
- Show only Unit 18 lecturers eligible for excellence review

Creating ad-hoc reports

1. Select the desired unit from the "unit" drop down menu. You will only have access to units assigned to you via AP On-Line Review.

Unit:

1

- 2 **Academic Group:**
- Regular Teaching Faculty - Ladder Ranks
 - Regular Teaching Faculty - Acting Ranks
 - Lecturers with (Potential) Security of Employment
 - Unit 18
 - Other Faculty
 - Administrative Titles
 - Other Academic Personnel and Pay Codes
 - Student Assistants
 - Librarians
 - Researchers
 - Cooperative Extension
 - University Extension

2. Select the academic group(s) you would like to include on the report by clicking the checkbox next to the academic group name. If you would like to see all academic groups on the report, do not click any checkboxes.
3. The main report will contain the following default information for each academic employee: Name, Title, Rank, Step, OS indicator, and Home department.

Export to Excel

Current Academic Employees (247)

Action	Name	Title	Rank	Step	OS	Home Department
--------	------	-------	------	------	----	-----------------

If you choose to include only Unit 18 appointees on your report, the default report will contain the following information: Name, Title, Home Department, Total Quarters, and Quarter Count Details.

Current Academic Employees (7)

Action	Name	Title	Home Department	Total Quarters	Quarter Count Detail
--------	------	-------	-----------------	----------------	----------------------

4. You may choose to add additional information to reports or filter results by selecting one or more of the following options:

Report Options:

Title:

Rank:

Career Status:

- Show only employees missing from APOL database (highlighted in gold)
- Show only employees in selected home department
- Show Senate titles only
- Show salary information
- Show reviews due
- Show hire date
- Show only Unit 18 lecturers eligible for mentor meeting
- Show only Unit 18 lecturers missing mentor meeting status
- Show only Unit 18 lecturers missing non-reappointment reason
- Show only Unit 18 lecturers eligible for 10th quarter salary increase
- Show only Unit 18 lecturers eligible for excellence review

5. To save your query for future use, enter a name in the provided text field and click "Save this Query".

Export to Excel

6. Your saved query will now be accessible via the "Report" drop down menu for future use.

NOTE

Your query has been saved

Report:

Test query ▾



Unit:

| ▾

Academic Group: Regular Teaching Faculty - Ladder Ranks Other Faculty Librarians Regular Teaching Faculty - Acting Ranks Administrative Titles Researchers**Generating canned reports**

1. Select the desired report from the “Report” drop down menu.
2. Select the desired unit from the “Unit” drop down menu. You will only have access to units assigned to you via AP On-Line Review.

Available canned reports

Report title	Description
Unit 18 Eligible for 10 th Quarter Salary Increase	Report will show all individuals who have earned 9 quarters in the specified unit and upon reappointment, are eligible for a 10 th quarter salary increase.
Unit 18 Eligible for Excellence Review	Report will show all individuals who have earned 17 quarters in the specified unit and upon reappointment, are eligible for an excellence review
Unit 18 Eligible for Mentor Meeting	Results will show individuals who have been appointed to a 9th quarter in the specified unit.
Unit 18 Missing Mentor Meeting Status	Results will show all individuals who have been appointed to a 9th quarter in the specified unit and are missing a mentor meeting status data entry.
Unit 18 Missing Non-Reappointment Reason	Results will show all individuals who are currently appointed in a Unit 18 title who do not have a subsequent reappointment record in the database and are missing a non-reappointment reason data entry.

Section 2: Employee Data Screen

This screen is the default screen in the academic's profile and contains personal, home department, appointment snapshot, degree/prior service, career milestones, and other special designation data.

Department Staff and Department Chairs have read only access of any information entered in Employee data screen.

Dean Staff, Dean, CAP staff, and APO staff may add new records and edit existing records in the Employee data screen.

Employee Lookup:

Employee

Unit 18

Evals

PLEASE NOTE

Some information on this page is synchronized with the system of record (PPS). Those fields are not editable on this page for existing employee records, and any corrections should be made in PPS.

Please use the form below to edit an employee's information, or [add a new employee record](#). Use the "Employee Lookup" form at the top of the page to find an employee's record.

Personal Information

Last Name:	<input type="text"/>	First Name:	<input type="text"/>	Preferred Name:	<input type="text"/>
Employee Number:	<input type="text"/>	PID:	<input type="text"/>		
Gender:	<input type="text" value="Please Choose..."/>	Ethnicity:	<input type="text" value="Select an ethnic group"/>	<input type="text" value="Select an ethnicity"/>	
Citizen Status:	<input type="text" value="Please Choose..."/>	Employment Status:	<input type="text" value="Please Choose..."/>		
Visa Type:		Partner/Spouse:			

Home Department

Sub-Campus:	<input type="text" value="Select a sub-campus"/>	Division/School:	<input type="text" value="Select a division"/>	Department:	<input type="text" value="Select a department"/>	<input type="text" value="Select an APO unit"/>
College Affiliation:	<input type="text" value="Please Choose..."/>					

Current Appointments

No current appointments found

Degree/Prior Service

Highest Degree:	<input type="text" value="Please Choose..."/>
Degree Year:	<input type="text"/>
Degree Institution:	<input type="text" value="Please Choose..."/>
Prior Service Description:	<input type="text" value="Please Choose..."/>
Prior College or University:	<input type="text" value="Please Choose..."/>

Career Milestones

Hire Date:	<input type="text"/>
LRF Hire Date:	<input type="text"/>
Year Achieved Assistant Rank:	<input type="text"/>
Year Achieved Associate Rank:	<input type="text"/>
Year Achieved Full Rank:	<input type="text"/>

Other

HHMI/Ludwig:	<input type="text" value="Please Choose..."/>
30 Day Leave Eligible:	<input type="text" value="Please Choose..."/>
Special Designation:	<input type="text" value="NONE"/>

Save

Cancel

Navigating to the Employee Data Screen

Option 1

1. Click on the AP Admin tab to enter the data entry screens.

Academic Employee Report



2. Click on the Employee tab.

AP Admin

Employee Lookup:



PLEASE NOTE

Some information on this page is synchronized with the system of record (PPS). Those fields are not editable on this page for existing employee records, and any corrections should be made in PPS.

You may search for candidates by typing their first or last name in the “Employee Lookup” search bar located on the upper right hand corner of the screen. For quicker results, the preferred method is to search by last name or partial last name.

Department Chair and Department staff view:

HOME » ACADEMIC PERSONNEL SYSTEM » ADMINISTRATION » AP ADMIN



Academic Personnel System

AP Admin

Employee Lookup:



Dean, Dean staff, CAP staff, and APO staff view:

HOME » ACADEMIC PERSONNEL SYSTEM » ADMINISTRATION » AP ADMIN



Academic Personnel System

AP Admin

Employee Lookup:



Option 2

1. From an on-screen report, click “view” next to the appointee’s name.

View		1143 - PROF-AY-B/E/E	Full Professor	A	Electrical and Computer Engineering
View	1	1143 - PROF-AY-B/E/E	Full Professor	6	O Electrical and Computer Engineering
View		1143 - PROF-AY-B/E/E	Full Professor	2	O Electrical and Computer Engineering

Section 3: Unit 18 Data Screen

This screen provides data related to appointee's Unit 18 and Continuing Lecturer appointment history.

Employee Lookup:

Employee **Unit 18** Evals

PLEASE NOTE

Departmental staff must contact the Dean's office for updates to this section or to add records. Only the "Non-Reappointment" and "Mentor" fields are available for departmental staff to edit, after the record has been added by the Dean's office.

Click "Edit" to edit the details of an appointment listed below. Dean's office staff may click "Add" to add a listed appointment and its quarter count to the database.

Department Totals

Department	Pre-18	Cont Appt	3 Year	Total
Electrical and Computer Engineering	9	0	0	9

Unit 18 Quarter List

[Export to Excel](#)

Action	Appt. No.	Appointing Department	Begin Date	End Date	Title	Qtrs.	Type
Edit		ELECT & COMPUTER ENG [000202]	4/1/2013	6/30/2013	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	1/1/2014	6/30/2014	1632 - LECT-AY-1/9	2	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	7/1/2014	6/30/2015	1630 - LECT-AY	3	PRE-18
Edit	10	ELECT & COMPUTER ENG [000202]	7/1/2015	6/30/2016	1630 - LECT-AY	3	PRE-18

Navigating to the Unit 18 data screen

Option 1

1. Click on the AP Admin tab to enter the data entry screens.

Academic Employee Report

Reports **AP Admin** 1

2. Click on the Unit 18 tab.

AP Admin

3 Employee Lookup:

Employee **Unit 18** Evals 2

PLEASE NOTE

Some information on this page is synchronized with the system of record (PPS). Those fields are not editable on this page for existing employee records, and any corrections should be made in PPS.

3. Search for the candidate's record by typing their first or last name in the "Employee Lookup" search bar located on the upper right hand corner of the screen.

Option 2

1. From an on-screen report, click “view” next to the appointee’s name.
2. Click on the Unit 18 tab.

Mentoring meeting status data entry

1. Locate the appointment that contains the 9th quarter of service within the Unit 18 Quarter List and click “edit”.

[Employee](#) [Unit 18](#) [Evals](#)

CANDIDATE II, TEST (123456788 / A12345678)

PLEASE NOTE
Departmental staff must contact the Dean's office for updates to this section or to add records. Only the "Non-Reappointment" and "Mentor" fields are available for departmental staff to edit, after the record has been added by the Dean's office.

Click "Edit" to edit the details of an appointment listed below. Dean's office staff may click "Add" to add a listed appointment and its quarter count to the database.

Department Totals

Department	Pre-18	Cont Appt	3 Year	Total
Computer Science and Engineering	8	0	0	8
Electrical and Computer Engineering	9	0	0	9

Unit 18 Quarter List [Export to Excel](#)

Action	Appt. No.	Appointing Department	Begin Date	End Date	Title	Qtrs.	Type
Edit		ELECT & COMPUTER ENG [000202]	10/1/2008	12/31/2008	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	10/1/2010	12/31/2010	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	10/1/2011	12/31/2011	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	10/1/2012	12/31/2012	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	1/1/2013	3/31/2013	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	4/1/2013	6/30/2013	1632 - LECT-AY-1/9	1	PRE-18
Edit		ELECT & COMPUTER ENG [000202]	10/1/2013	3/31/2014	1632 - LECT-AY-1/9	2	PRE-18
		CMPTR SCI & ENGRNG [000209]	1/1/2014	3/31/2014	1632 - LECT-AY-1/9	1	PRE-18
		CMPTR SCI & ENGRNG [000209]	4/1/2014	6/30/2014	1632 - LECT-AY-1/9	1	PRE-18
		CMPTR SCI & ENGRNG [000209]	10/1/2014	12/31/2014	1632 - LECT-AY-1/9	1	PRE-18
		CMPTR SCI & ENGRNG [000209]	1/1/2015	3/31/2015	1632 - LECT-AY-1/9	1	PRE-18
		CMPTR SCI & ENGRNG [000209]	4/1/2015	6/30/2015	1632 - LECT-AY-1/9	1	PRE-18
		CMPTR SCI & ENGRNG [000209]	7/1/2015	6/30/2016	1630 - LECT-AY	3	PRE-18
Edit	1	ELECT & COMPUTER ENG [000202]	3/1/2016	6/30/2016	1630 - LECT-AY	1	PRE-18

2. Scroll through the expanded appointment details section and locate the Mentor section. Using the “Mentor Meeting Status” drop down menu, select one of the following options: Completed, Declined, Postponed, and Scheduled.

		CMPTR SCI & ENGRNG [000209]	7/1/2015	6/30/2016	1630 - LECT-AY	3	PRE-18
Edit	0	ELECT & COMPUTER ENG [000202]	3/1/2016	6/30/2016	1630 - LECT-AY	1	PRE-18

Appointment Details

Appointment:

Quarter Type:

- Pre-18:** Quarters earned before and after 2003 contract counting toward 18 quarters and continued appointment
- Cont Appt:** Quarters earned after 2003 contract and after achieving continuing appointment
- 3 Year:** Quarters, both pre and post continuing appointment, earned prior to 2003 contract. NOTE: Only for those who achieved a continuing appointment before the 2003 contract.
- Transfer** (new appointment records only): Quarters transferred from another UC campus. You will be required to select the campus quarters are being transferred from.

Quarter Type Detail:

Appointment Quarters:

Quarter	Disposition	Cross-Listed Course
Spring Qtr 2016	<input type="text" value="MANUAL ENTRY; NOT IN FINAL ACTION"/>	<input type="text" value="Select one (if applicable)"/>

Non-Reappointment

Non-Reappointment Reason:

Non-Reappointment Supporting Document (optional): No file chosen

Mentor

Mentoring Meeting Status: 2

Mentoring Meeting Date: 3

Mentoring Meeting Supporting Document (optional): No file chosen 4

5

- If applicable, enter the date of the mentor meeting in the “Mentor Meeting Date” field using the calendar tool or by typing the date in the text field.
- Upload the meeting documentation form in the “Mentor Meeting Documentation Form” section.
- Click “Save”.

Non-reappointment reason disposition data entry

- Locate the appointment that requires a non-reappointment reason within the Unit 18 Quarter List and click “edit”.

		CMPTR SCI & ENGRNG [000209]	7/1/2015	6/30/2016	1630 - LECT-AY	3	PRE-18
Edit	0	ELECT & COMPUTER ENG [000202]	3/1/2016	6/30/2016	1630 - LECT-AY	1	PRE-18

Appointment Details

Appointment:

Quarter Type:

- Pre-18:** Quarters earned before and after 2003 contract counting toward 18 quarters and continued appointment
- Cont Appt:** Quarters earned after 2003 contract and after achieving continuing appointment
- 3 Year:** Quarters, both pre and post continuing appointment, earned prior to 2003 contract. NOTE: Only for those who achieved a continuing appointment before the 2003 contract.
- Transfer** (new appointment records only): Quarters transferred from another UC campus. You will be required to select the campus quarters are being transferred from.

Quarter Type Detail:

Appointment Quarters:

Quarter	Disposition	Cross-Listed Course
Spring Qtr 2016	<input type="text" value="MANUAL ENTRY; NOT IN FINAL ACTION"/>	<input type="text" value="Select one (if applicable)"/>

Non-Reappointment

Non-Reappointment Reason: 2

Non-Reappointment Supporting Document (optional): No file chosen 3

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2. Scroll through the expanded appointment details section and locate the Non-Reappointment section. Using the Non-Reappointment Reason drop down menu, select one of the following options:
 - Reduced need - previous appt due to short-term need
 - Reduced need - current graduate student teaching
 - Reduced need - Senate faculty teaching
 - Reduced need - distinguished Visiting/Adjunct teaching
 - Reduced need - lack of enrollment
 - Recent graduate - preferential hire for training purposes
 - More qualified candidate selected
 - Intellectual/academic diversity
 - Programmatic change/course not offered
 - NSF did not apply
 - NSF withdrew application
 - NSF declined offer
 - NSF unable to teach due to scheduling conflict
 - NSF changed series
 - Poor performance
 - Negative excellence review
 - Inadequate visa status
 - Non-teaching quarter
 - Misconduct
3. Upload any non-reappointment supporting documentation, if desired.
4. Click "Save".