# 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 <u>Academic Personnel Services home</u> <u>page</u>.

#### 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.

<u>Department Staff:</u> 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.

<u>Department Chair</u>: 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.

<u>Dean Staff:</u> 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.

<u>Dean:</u> 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.

<u>CAP Staff</u>: 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.

<u>APO</u>: 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

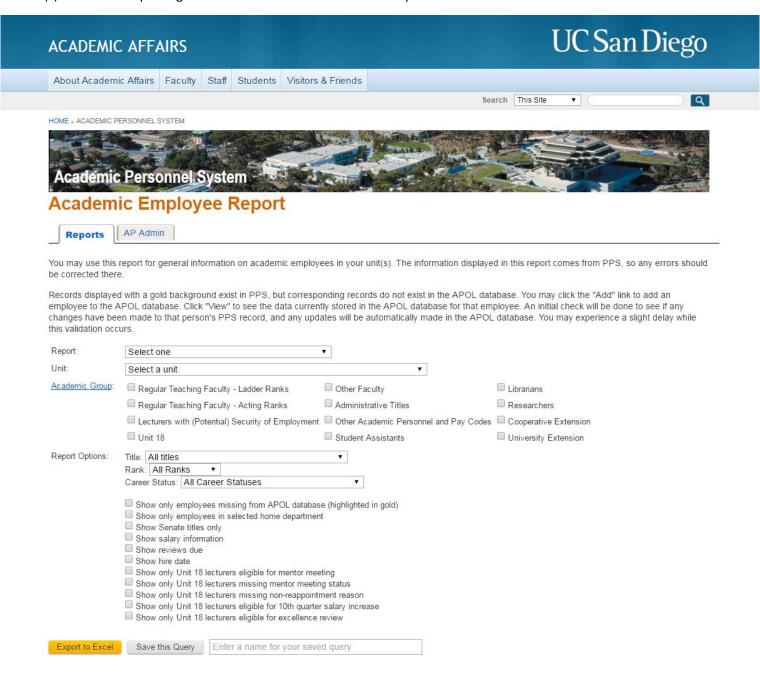
If you have general questions regarding academic personnel policy, please contact your divisional dean's office.

If you have questions regarding technical issues or error messages in *AP Data* please contact Academic Technology Services (ATS), <a href="mailto:ats@ucsd.edu">ats@ucsd.edu</a>

To submit general questions, feedback, suggestions for improvements or future enhancements, please contact Brandy Cheshire, <a href="mailto:bmisquez@ucsd.edu">bmisquez@ucsd.edu</a>

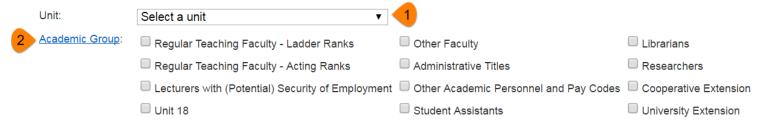
# **Section 1: Academic Employee Report Tool**

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



#### 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.

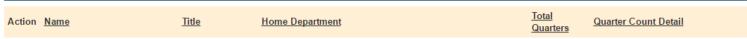


- 2. Select the academic group(s) you would like to include on the report by clicking the checkbox next to the academic group name. If you would like to see all academic groups on the report, do not click any checkboxes.
- 3. The main report will contain the following default information for each academic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

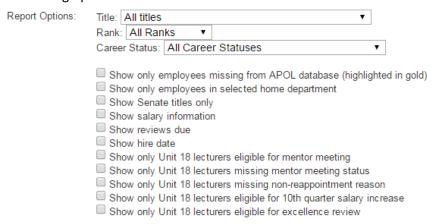


If you choose to include only Unit 18 appointees on your report, the default report will contain the following information: Name, Title, Home Department, Total Quarters, and Quarter Count Details.

#### Current Academic Employees (7)



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



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



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



# **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 <sup>th</sup> 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 <sup>th</sup> 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:      |               |
|---|--------------------|-------------------------------------|------------------------------|-----------------------|---------------|
| <b>Employee</b> U                         | nit 18 Evals       |                                     |                              | ·                     |               |
| should be made in PPS                     | 3.                 | with the system of record (PPS). To |                              |                       |               |
| Personal Informati                        | on                 |                                     |                              |                       |               |
| Last Name:                                |                    | First Name:                         |                              | Preferred Name:       |               |
| Employee Number:                          |                    | PID:                                |                              |                       |               |
| Gender:                                   | Please Choose 🔻    | Ethnicity:                          | Select an ethnic group ▼     | Select an ethnicity • |               |
| Citizen Status:                           | Please Choose 🔻    | Employment Status:                  | Please Choose                | v                     |               |
| √isa Type:                                |                    | Partner/Spouse:                     |                              |                       |               |
| Home Department                           |                    |                                     |                              |                       |               |
| Sub-Campus: Sele                          | ect a sub-campus ▼ | Division/School: Select a division  | on v Department: Select a de | partment • Select a   | an APO unit 🔻 |
| College Affiliation: Plea                 | ase Choose         |                                     | Ψ                            |                       |               |
| Current Appointme                         | ents               |                                     |                              |                       |               |
| No current appointmen  Degree/Prior Servi |                    |                                     |                              |                       |               |
| Highest Degree:                           | Please Choose      | v                                   |                              |                       |               |
| Degree Year:                              | Tiease Onlosse     |                                     |                              |                       |               |
| Degree Institution:                       | Please Choose      |                                     | y .                          |                       |               |
| Prior Service Description                 |                    |                                     | ¥                            |                       |               |
| Prior College or Univers                  | ity: Please Choose |                                     | Ψ                            |                       |               |
| Career Milestones                         |                    |                                     |                              |                       |               |
| Hire Date:                                |                    |                                     |                              |                       |               |
| LRF Hire Date:                            |                    |                                     |                              |                       |               |
| Year Achieved Assistant                   | Rank:              |                                     |                              |                       |               |
| Year Achieved Associate                   |                    |                                     |                              |                       |               |
| Year Achieved Full Rank                   |                    |                                     |                              |                       |               |
| real Achieved Full Rahi                   |                    |                                     |                              |                       |               |
| Other                                     |                    |                                     |                              |                       |               |
| HHMI/Ludwig:                              | Please Choose *    |                                     |                              |                       |               |
| 30 Day Leave Eligible: [                  | Please Choose      | ¥                                   |                              |                       |               |
| Special Designation:                      | NONE               | Y                                   |                              |                       |               |
| Save                                      |                    |                                     |                              |                       |               |

## **Navigating to the Employee Data Screen**

#### Option 1

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



2. Click on the Employee tab.

### **AP Admin**



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:



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



# 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   | Α | Electrical and Computer Engineering |
|--------|----------------------|------------------|---|-------------------------------------|
| View 1 | 1143 - PROF-AY-B/E/E | Full Professor 6 | 0 | Electrical and Computer Engineering |
| View   | 1143 - PROF-AY-B/E/E | Full Professor 2 | 0 | 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 Evals Unit 18 A 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

| Unit 18 Quarter List |           |                               |            |           | E                  | Export to Excel |        |
|----------------------|-----------|-------------------------------|------------|-----------|--------------------|-----------------|--------|
| Action               | Appt. No. | Appointing Department         | Begin Date | End Date  | Title              | Qtrs.           | Туре   |
| <u>Edit</u>          |           | ELECT & COMPUTER ENG [000202] | 4/1/2013   | 6/30/2013 | 1632 - LECT-AY-1/9 | 1               | PRE-18 |
| <u>Edit</u>          |           | ELECT & COMPUTER ENG [000202] | 1/1/2014   | 6/30/2014 | 1632 - LECT-AY-1/9 | 2               | PRE-18 |
| <u>Edit</u>          |           | ELECT & COMPUTER ENG [000202] | 7/1/2014   | 6/30/2015 | 1630 - LECT-AY     | 3               | PRE-18 |
| <u>Edit</u>          | 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

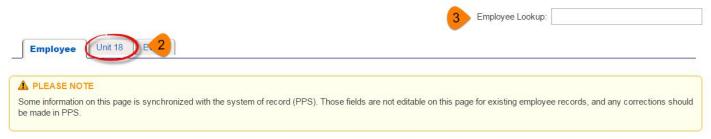
1. Click on the AP Admin tab to enter the data entry screens.

# Academic Employee Report



2. Click on the Unit 18 tab.

# **AP Admin**



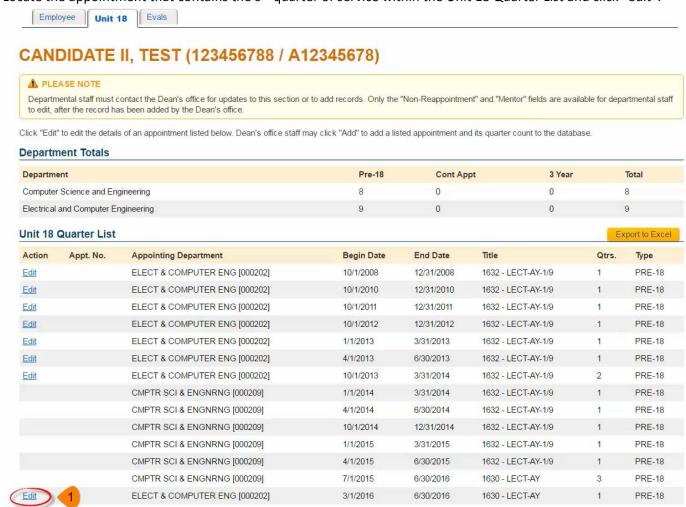
3. Search for the candidate's record by typing their first or last name in the "Employee Lookup" search bar located on the upper right hand corner of the screen.

#### Option 2

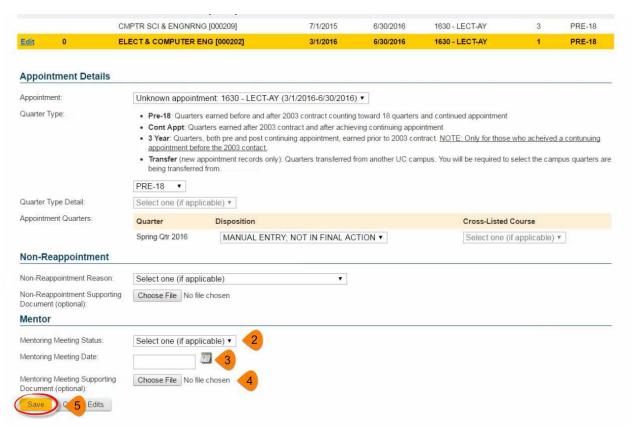
- 1. From an on-screen report, click "view" next to the appointee's name.
- 2. Click on the Unit 18 tab.

#### Mentoring meeting status data entry

1. Locate the appointment that contains the 9<sup>th</sup> quarter of service within the Unit 18 Quarter List and click "edit".



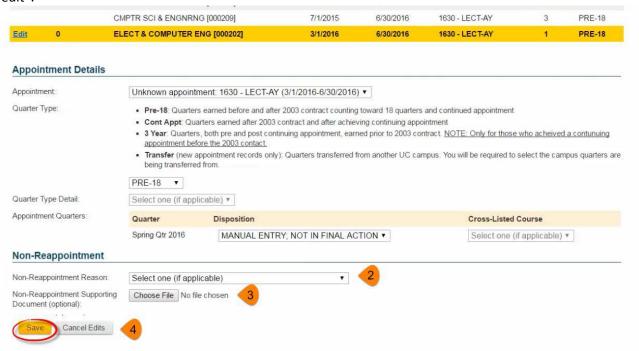
2. Scroll through the expanded appointment details section and locate the Mentor section. Using the "Mentor Meeting Status" drop down menu, select one of the following options: Completed, Declined, Postponed, and Scheduled.



- 3. 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.
- 4. Upload the meeting documentation form in the "Mentor Meeting Documentation Form" section.
- 5. Click "Save".

## Non-reappointment reason disposition data entry

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



- 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".