L&S FTA Application Administrator Manual

The UWM College of Letters and Science has developed a new application which allows all L&S departments to easily create, revise, and view the status of existing Fixed Term Appointments in an intuitive web-based environment. In addition to the standard user tasks, an administrator menu is available with more advanced functions. This document will serve as an introduction to the administrator functions of the L&S Fixed Term Appointment (FTA) application by walking you through the various features contained within.

First, access the L&S FTA application with the same web address:

http://www4.uwm.edu/LS/fta/

As before, after logging in with your ePanther ID and password, the home screen of the application will be displayed. However, if you have administrator access, an extra Admin subheading will be added near the bottom of the Actions Menu on the right:

Table of Contents

Deleting an Appointment ................................................................................................................. 1
Changing Semester Dates ................................................................................................................. 2
Editing Instructor Information ......................................................................................................... 4
Changing Appointment Departments ............................................................................................... 5
Deleting an Instructor ....................................................................................................................... 6
Viewing and Editing FTA Application Users .................................................................................. 7
Generating FTA Contracts ............................................................................................................... 9
Deleting an Appointment

Under the Admin subheading on the Actions Menu, click Delete Appointment to bring up the familiar search page:

Find the instructor associated with your desired appointment via one of the three methods and click Select to the right of their name to display a list of appointments:

Click Edit to the right of the appointment you wish to delete, bringing up the details of that appointment. If you still wish to remove the appointment from the database, scroll to the bottom and click Delete Appointment. A success message will notify you that the record has been removed.
### Changing Semester Dates

To ensure functionality in the future, the FTA application gives administrators the option of changing the ranges of dates displayed on the appointment request screen. Under the **Admin** subheading on the **Actions Menu**, click **Change Semester Dates** to bring up the following page:

#### Change Semester Dates

<table>
<thead>
<tr>
<th>Base</th>
<th>Display</th>
<th>Start</th>
<th>End</th>
<th>Term</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>08-20-2000</td>
<td>01-03-2001</td>
<td>2001</td>
<td></td>
</tr>
</tbody>
</table>

All of the possible dates for the appointment request are shown, along with a preview window of the **Appointment Term** section of the appointment request page.

The column labeled **Base** will correspond with the next full semester and should be changed at the end of every semester; in essence, this is the ‘base’ value for appointments lasting longer than one semester. To change the **Base** semester, simply click the radio button next to the appropriate time period.

The column labeled **Display** is fairly self-explanatory: if you want a particular time period to appear on the appointment request page, click the checkbox next to it. Likewise, if you want to remove a range of dates from the list, click the checkbox next to it in the **Delete** column.

To save any of these changes, click **Submit Changes**. The page will reload and the preview below the list of dates should reflect the changes.

Below the preview window, a field is available to add future semesters to the list:

#### Add a New Semester

- **Start Date:**
- **End Date:**
- **Season:**  
  - Fall  
  - Spring
- **Display:**

To save any changes, click **Submit Changes**.
To add a new semester, enter the **Start Date** and **End Date** and click the appropriate radio button to indicate the season. Newly-entered semesters are immediately visible by default; click the **Display** checkbox if you’d like the dates to be hidden instead.

When you’ve finished, click **Submit Changes** to reload the page and update the preview window with the new dates.
Editing Instructor Information

Once an instructor is added by users of the FTA application, their SSN and Instructor ID can only be changed by an administrator. Under the Admin subheading on the Actions Menu, click Change SSN/Instructor ID to edit this information, bringing up the familiar search page:

Enter the appropriate instructor information into the corresponding search field and click Find Instructor. Click the Select link to the right of the instructor’s name to load the following page:

Enter the new value for Instructor ID and/or SSN as necessary and click Save Changes.
### Changing Appointment Departments

Any administrator has the ability to change the department of an appointment, as do all other non-admin users of the FTA application. However, as an administrator you are able to add new departments to the dropdown list for use in future appointment requests. To change the department of an appointment, click **Change Appointment Dept.** under the **Admin** subheading of the **Actions Menu**.

Use the search procedure described earlier to find your desired instructor on the page that appears, clicking **Select** as before to display a list of their current appointments:

<table>
<thead>
<tr>
<th>Contract ID</th>
<th>Instructor ID</th>
<th>Dept</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>15014</td>
<td>267127905</td>
<td>2000</td>
<td>08/18/2008</td>
<td>01/01/2009</td>
<td>Y</td>
</tr>
</tbody>
</table>

Click the **Edit** link to the right to choose the appropriate appointment and load the following page:

#### Step 2: Select Appointment

Please choose the appointment you would like to modify.

To change the department to an existing department, select it from the dropdown menu and click **Save**. For a new department, enter the number and name in the appropriate fields under **Custom Department** and click **Save**. After saving the changes, the page will reload with a success message and a list of the updated details of the selected appointment.
Deleting an Instructor

Deleting an instructor from the database is a simple process. Under the Admin subheading of the Actions Menu, click Delete Instructor to bring up the instructor search page. Using the search and selection process described earlier, find and choose your desired instructor, bringing up the following deletion confirmation page:

Delete Instructor

Are you sure that you want to delete this instructor?
The appointment(s) listed below will also be deleted from the database.

<table>
<thead>
<tr>
<th>Name:</th>
<th>John Fake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor ID:</td>
<td>784258754</td>
</tr>
<tr>
<td>SSN:</td>
<td>987654321</td>
</tr>
</tbody>
</table>

Contract ID | Instructor ID | Term | Department | Begin Date | End Date

No appointments were found for this instructor.

Delete Instructor

The instructor’s identifying information is listed, along with a list of all appointments that have ever been associated with them. If you still wish to permanently delete the selected instructor and all past appointments from the database, click Delete Instructor.
Viewing and Editing FTA Application Users

As an administrator, one of your most important responsibilities is the efficient management of FTA application users. When contacted to add access for a user, you can quickly add a new user by clicking the Add a New User link under the Personal subheading of the Actions Menu:

Add a New User

Please enter the new user’s ePanther ID (e.g. jnmbersch). Upon the user’s initial login, he or she will be prompted to enter contact information.

User's ePanther ID: ___________________  Add User

Simply enter the user’s ePantherID and click Add User. A message will appear, notifying you that the user has been added successfully:

Add a New User

Success!
User's Name: Eric John Dohman
User's ePanther ID: dohman

The user listed above now has access to this application. This user may log into the system using the ePanther ID and Password that allows the user to access UWM services like PantherLink email and calendar.

To view a list of the application’s current users and to remove access for a specific user, click List All Users under the Personal subheading of the Actions Menu to the right:

A table of current users and their information appears on the following page:

View and Modify Users

<table>
<thead>
<tr>
<th>Login ID</th>
<th>Name</th>
<th>Department</th>
<th>Phone</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>josephs7</td>
<td>Joseph W Steinbring</td>
<td>Edison Initiative</td>
<td>4142295599</td>
<td>06-10-2008  05:47:56</td>
</tr>
<tr>
<td>dohman</td>
<td>Eric John Dohman</td>
<td></td>
<td></td>
<td>06-02-2008  05:47:56</td>
</tr>
</tbody>
</table>
To delete a user and remove their access from the FTA application, click on their name in the Login ID column of the user table:

<table>
<thead>
<tr>
<th>Login ID</th>
<th>Name</th>
<th>Department</th>
<th>Phone</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>josephs7</td>
<td>Joseph W Steinbrin</td>
<td>Edison Initiative</td>
<td>4142295590</td>
<td>06-10-2008 05:47:56</td>
</tr>
<tr>
<td>dohman</td>
<td>Eric John Dohman</td>
<td></td>
<td></td>
<td>16-09-2008</td>
</tr>
</tbody>
</table>

A confirmation page will verify the deletion request. Click the **Delete User** button to remove the selected user’s access to the FTA application:

**View and Modify Users**

**Would you like to delete this user?**
The user listed below will no longer be able to access this application. All submitted appointments, however, will remain in the system.

**dohman**
Name: Eric John Dohman
Department: 
Phone: 
Last Login: 

[Delete User]

An updated user table will appear below the success message notifying you of the access changes.
Generating FTA Contracts

The end product of the FTA application is an electronic FTA database along with automated creation of many forms necessary for the appointment process. To create a contract letter complete with all the details of an appointment, click **Generate Contract** under the **Admin** subheading of the **Actions Menu** to bring up a table of submitted appointments:

<table>
<thead>
<tr>
<th>Contract Number</th>
<th>Department</th>
<th>Submit Date</th>
<th>Submitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>11003</td>
<td>Edison Initiative</td>
<td>09/26/2008</td>
<td>njbloom</td>
</tr>
</tbody>
</table>

Click the **Contract Number** of your desired appointment to view the details of the contract.

If your desired contract isn’t listed, ensure that a **Contract Request** has been submitted by the user entering the FTA request. **For help with this procedure, turn to page 7 of the L&S FTA Application Manual.**

On the contract details page, the instructor’s personal information is displayed above the appointment details and attached courses. To edit information for any of the sections, click the **Edit** link to the right of the section title:

A new page will appear which allows you to change the details of the desired section. When the changes have been made, clicking **Save Changes** on this new page will update the details in the database. You’ll also notice a pop-up window which appears when you click the **Edit** link:

![Currently Editing Contract #15016-4](https://www4dev.uwm.edu - Return to the Contract - Mozilla Firefox)
After saving your changes, clicking the link in the pop-up window will return you to the contract generation page. After verifying that all the details of the contract are correct, scroll to the section of the page near the bottom of the page labeled **Customize Offer Letter**. Make any necessary changes to the information contained therein, and click the **Generate Contract Letter** button at the bottom of the page when satisfied.

You’ll be prompted to Open or Save the Word document created by the application. Choose **Save to Disk** and click **OK**. Make any necessary changes to the cover letter and print a copy.