L&S Fixed Term Appointment Application 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. This document will serve as an introduction to the L&S Fixed Term Appointment (FTA) application by walking you through the various features contained within.

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Accessing the FTA Application

The L&S FTA application can be accessed at the following web address:

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

When accessing the application, you’ll be prompted to login with your ePanther ID and password:

If this is your first time using the FTA application, you’ll be prompted to update your phone number and department information for contact purposes before the application is loaded. To continue, fill in your information and click Submit Updates. Afterward, you will be notified of the changes to your account; click Continue Login to advance to the home screen of the application.

You can change your information at any time by clicking the Change Your Contact Info link within the application:

If you experience login issues, you may not yet have access to the application. For access inquiries, please e-mail Anne Potter at irisa@uwm.edu or e-mail the L&S Web Development Team at ls-web@uwm.edu.
Creating an FTA Request

After logging in, the home screen of the application will be displayed. When creating or modifying FTA requests, you’ll be using the Actions Menu on the right side of the page:

1. Under the Appointments subheading, click Create Appointment Request to bring up the following page outlining the three steps involved in the creation of a new FTA request:

Create an Appointment Request

Instructions

There are three steps to create an appointment request:

1. Choose an instructor who will be associated with this request. If the instructor has not previously taught at the university, you can add the instructor to the database.

2. Fill in the details about the appointment.

3. Add courses to the appointment.

To begin, please choose if the instructor is a new or existing instructor.

New Instructor  Existing Instructor
If this is the first time an instructor has been used within the FTA application, you’ll need to add them to the database before associating them with your newly-created appointment.

For subsequent appointments using previously entered instructors, click the **Existing Instructor** button to create a new appointment. On the page that appears, you can search for instructors by SSN, last name, or Instructor ID.

2. To add a new instructor, click the **New Instructor** button. On the page that appears, you’ll see five sections of required information for each new instructor: **Name, Identifying Information, Education, Citizenship and Tax, and Mailing Address**. Enter as much information about the new employee as possible.

Pay special attention to the field labeled **Instructor ID**—this is a unique 9-digit ID number for the employee in question which can easily identify them within the application after they’ve been added:

![Instructor ID has been auto-populated with a unique ID. You may change the ID to any 9-digit number that is not currently in use.](image)

Instructor ID: 123456789

You will notice that some fields in the **Identifying Information** section are underlined with a dotted gray line. This signifies that tooltips with additional information or formatting guidelines are available; to display this information, simply move your mouse cursor over the value in question:

![SSN: The instructor's social security number. Format: XXXXXXXXXX (no dashes or spaces) [Optional].](image)

SSN: 123456789

Birthdate: 11/02/1984

Sex: Male

Birth Year: 2007

3. When you’ve finished entering your information, click **Save Changes**. The following page will notify you that the instructor has been added. To continue creating your FTA request, click **Create Appointment with Instructor**.
The following page displays the FTA request form, which is comprised of six sections: **Instructor Information, Appointment Information, Appointment Term, Pay Information, Duties, and Misc.** You’ll notice that the first section has been populated with information about the selected instructor and the **Contract ID** field has been filled with a uniquely identifiable number:

<table>
<thead>
<tr>
<th>Instructor Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Instructor ID:</strong> 717685252</td>
</tr>
<tr>
<td><strong>Instructor Name:</strong> John Q Fake</td>
</tr>
<tr>
<td><strong>SSN:</strong> 123456789</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contract ID:</strong> 11024</td>
</tr>
</tbody>
</table>

**4.** Complete the remaining five sections with the necessary information about the position. Remember that if you have questions about the information or formatting required for a specific field, you can use your mouse cursor to display tooltips that will guide you. When you’re done, click **Save Changes** to add the FTA to the database.

A success message will appear, along with a list of the appointments added to the database. Depending on the length of the selected **Appointment Term**, several appointments may be created. Each semester an instructor teaches, a separate appointment will be created in the database to allow the addition of different classes for each semester. By default, the application will prompt you to add courses to the first semester’s appointment.

For further information concerning terminology or questions about the FTA process itself, please e-mail Anne Potter at irisa@uwm.edu.
Adding and Editing Courses

After logging in, the home screen of the application will be displayed. When creating or modifying FTA applications, you’ll be using the **Actions Menu** on the right side of the page:

1. Under the **Appointments** subheading, click **Add/Edit Courses** to bring up the following page. As with the earlier procedures, there are three methods of finding instructors in the database:

   **Modify Courses**

   **Step 1: Find Instructor**
   Please locate the instructor whose appointment you would like to edit.

   - Search by the employee's unique ID
   - Search by Social Security Number
   - Search by last name

   To modify the courses scheduled for an instructor, an appointment must first be created. **For help with this procedure, turn to page 2.**
2. Enter the instructor’s information in the appropriate field and click **Find Instructor**. If an instructor is found, their name appears underneath the three search fields as before. Click the **Select** link to the right of the name to display a list of the selected instructor’s appointments:

![Modify Courses](image)

**Step 2: Choose Appointment**
Please choose an appointment to revise:

<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>15015-1</td>
<td>340364110</td>
<td>0300</td>
<td>01/11/2008</td>
<td>05/25/2008</td>
<td>Edit</td>
</tr>
<tr>
<td>15015-4</td>
<td>340364110</td>
<td>0300</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>15015-3</td>
<td>340364110</td>
<td>0300</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>15015-2</td>
<td>340364110</td>
<td>0300</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
</tbody>
</table>

As mentioned earlier, lengthier FTAs will create an appointment for each semester of the contract. These appointments can be identified by their **Contract ID**—that is, each semester has the same initial number, with an appended number signifying which semester of the appointment it is.

3. Click the **Edit** link next to the desired appointment to display a list of attached courses:

![Modify Courses](image)

**Current Courses**

No courses are currently attached to this appointment.

**Add a Course**

To add a course to the appointment, fill out the form below.

- **Course:** ENG 215
- **Section Type:** LEC
- **Section #:** 001
- **Course Title:** Introduction to English Studies

**Save Course**
4. To add a course, fill in the required information, keeping in mind that fields underlined with a dotted gray line have information in tooltips that can be displayed by moving your mouse cursor over the word in question. To attach the course to an instructor’s appointment, click Save Course. The page will reload, and if the course attachment was successful, a success message will appear:

**Course Added!**
Your course was successfully added to the list of courses. You may add another course below.

5. If you make a mistake entering the course information, you can easily change it by clicking the Edit link to the right of the course name:

<table>
<thead>
<tr>
<th>Course ENG-215 Section 001</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section Type:</td>
<td>LEC</td>
<td></td>
</tr>
<tr>
<td>Course Title:</td>
<td>Introduction to English Studies</td>
<td></td>
</tr>
</tbody>
</table>

Make the necessary changes and click Save Course to update your changes in the database.

6. Similarly, if you need to remove a course from an instructor’s appointment, simply click the Delete link. A new page will ask you to confirm that you want to delete the course. Click Delete Course to remove the course from the selected appointment.

7. When all courses for an appointment have been correctly added and you’re ready to submit the contract, proceed to the bottom of the page and click Submit Contract Request:

**Finish and Print**
When you have finished the appointment and are ready to submit the contract, click the button below. A PDF file will be generated with the required forms, and the contract will be made available to the administration.

The contract will open in a new window.

Submit Contract Request

This button generates a PDF file of the appointment contract and allows the administrators to view the appointment details. After the PDF file opens, print a copy and obtain the required signatures. When this has been completed, send the form to Anne Potter in Holton Hall 238.
Revising an FTA Request

After logging in, the home screen of the application will be displayed. When creating or modifying FTA requests, you’ll be using the **Actions Menu** on the right side of the page:

1. Under the **Appointments** subheading, click **Revise Appointment Request** to bring up the following page outlining the three methods of searching for instructors in the database:

   **Revise Instructor**

   **Step 1: Find Instructor**
   Please locate the instructor whose appointment request you would like to edit.

   - Search by the employee's unique ID
   - Search by Social Security Number
   - Search by last name
2. Enter the instructor’s information in the appropriate field and click **Find Instructor**. The results of your search will be displayed below the three search fields:

![Search interface](image)

**Found 1 instructor(s) in the database:**

<table>
<thead>
<tr>
<th>Instructor ID</th>
<th>Lastname</th>
<th>Firstname</th>
<th>Middlename</th>
</tr>
</thead>
<tbody>
<tr>
<td>717685252</td>
<td>Fake</td>
<td>John</td>
<td>Q</td>
</tr>
</tbody>
</table>

[Select]  

[Back]

3. If your desired result is listed, click the **Select** link to the right of the instructor’s name. A list of appointments for the selected instructor will be displayed:

![Appointment list](image)

**Revise Instructor**

**Step 2: Choose Appointment**

Please choose an appointment to revise:

<table>
<thead>
<tr>
<th>Contract ID</th>
<th>Instructor ID</th>
<th>Dept</th>
<th>Begin Date</th>
<th>End Date</th>
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<td>0300</td>
<td>01/11/2008</td>
<td>05/25/2008</td>
<td></td>
</tr>
</tbody>
</table>

[Edit]

4. Click the **Edit** link to the right of the appointment to bring up the appointment details. Make any necessary changes and click **Save Changes**.
Viewing and Changing Employee Information

After logging in, the home screen of the application is displayed. To view and change information entered about existing employees, you’ll be using the Actions Menu on the right side of the page:

1. Using the application’s search function, you can quickly review all appointment requests associated with a specific employee. Under the Employees subheading, click View Employee History to bring up the following page. As with the earlier procedures, there are three methods of finding instructors in the database:
2. Enter the instructor’s information in the appropriate field and click **Find Instructor**. A list of search results appears beneath the three search fields. Click the **Select** link to the right of the name to choose the appropriate instructor and bring up the history report page. To view the appointment history report, click **View History Document**.

![View Employee History](image)

4. You can also update the previously entered information for any instructor in the database. From the **Actions Menu** to the right of the page, click **Edit Instructor Information**. The familiar search boxes give you the three options for finding an instructor in the database.

5. Repeat the search and selection procedure described above to open a page with the instructor’s existing information. You’ll notice that the fields for **Instructor ID** and **SSN** have been grayed out; if you attempt to modify these values, you’ll receive an error message prompting you to contact an administrator. Update any necessary information and click **Save Changes**.

To make changes or corrections to an Instructor ID or SSN, please e-mail Anne Potter at **irisa@uwm.edu**.