



Human  
Resources

Straz Tower, 185  
915 W Wisconsin Ave.  
Phone: 414-288-7305  
Fax: 414-288-7425

# MyJob Electronic Salary Authorizations

## Summer Teaching Pay – Faculty and Staff

### Version 1.0

#### Introduction

This manual illustrates the **Summer Teaching Pay Batch** process for faculty and staff. The intended audience is employees responsible for position budgeting and those identified as authorized to approve summer teaching payroll authorizations per internal departmental procedures. This functionality will only be assigned to those who have submitted a completed Confidentiality Agreement to the Department of Human Resources.

To authorize summer teaching payments to graduate assistants, use either the **Reactivate Graduate Assistant** or the **MU New Graduate Assistant Hire** functions, as applicable.



# Summer Teaching Pay for Faculty and Staff

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## Process Summary

The Summer Teaching Pay batch process was designed to streamline authorization of payments to faculty and exempt staff (on the Monthly or Jesuit payrolls) who teach courses during the Summer academic term. The template data source is the class list and assignments per Snapshot, matched to the employee's position code and Oracle assignment in MyJob. The ImageNow application is used to route the batch for approval. When complete, the batch is uploaded to MyJob, creating both budget transfers and payroll transactions.

## Roles and Responsibilities

- *Initiator*: generates the batch template from BI reporting; populates the payment values for each employee by month, as applicable; enters the accounts and position codes for positional salary naturals from which to fund these payments; uploads batch to ImageNow and routes for approval; verifies batch is processed (via notifications/alerts).
- *Approver*: reviews the batch via ImageNow; responsible for final verification that the proposed payments are to eligible personnel, the amounts follow department rules, and the total to be paid matches the corresponding contract(s); approves or rejects batch as needed; notifies Initiator of reasons for rejected batches.
- *Budget Office*: uploads batches to MyJob; monitors the programs for any validation errors; assists the Initiators with funding questions as needed; routes batches to the Complete queue when successfully uploaded to MyJob or to the Reject queue if issues arise with the batch; notifies Initiator of reasons for rejected batches.
- *Payroll Department*: monitors the ImageNow workflow alerts to track batches in progress; reconciles batch totals from ImageNow document to payroll batch to program log to scheduled payments.

## Creating the Summer Teaching Pay Batch

For information regarding BI Reporting please see these instructions: [Business Intelligence User Guide](#).

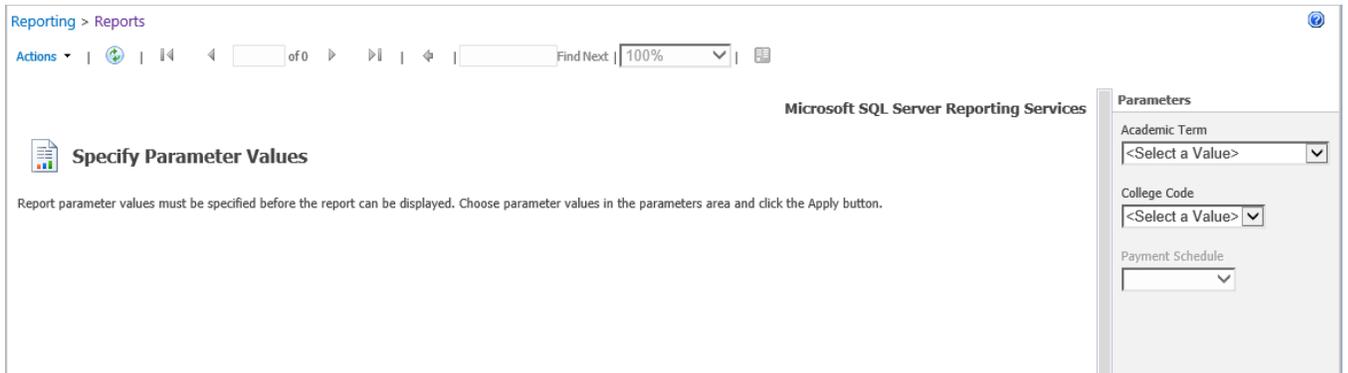
Initiators access the BI Reporting web site and click on the Summer Teaching Pay template to launch it.

The screenshot shows the Marquette Business Intelligence interface. At the top, there is a blue header with the text "Marquette Business Intelligence". Below the header, there are three tabs: "BROWSE", "FILES", and "LIBRARY", with "FILES" being the active tab. Below the tabs, there is a navigation bar with "All Reports", "Financial Management Reports", "Scholarship", and a search box containing "Find a file" and a magnifying glass icon. To the right of the search box is a "SAVE THIS VIEW" button. Below the navigation bar is a table with the following columns: "Name", "Dept", "RPT Type", "Data Source", "Activity", and "Approval Status". The table contains one row with the following data: "Summer Teaching Pay", "Office of Finance", "Template", "Prod", "Testing", and "Approved".

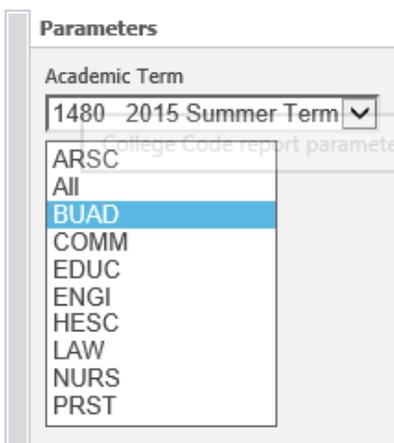
✓	📄	Name ↓	Dept	RPT Type ▼	Data Source	Activity	Approval Status
	📄	Summer Teaching Pay	... Office of Finance	Template	Prod	Testing	Approved

# Summer Teaching Pay for Faculty and Staff

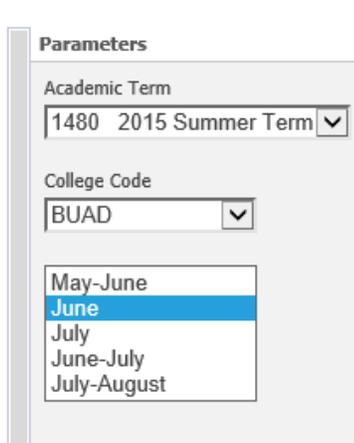
On the right hand side of the screen, select the applicable parameters, using the drop-down arrows.



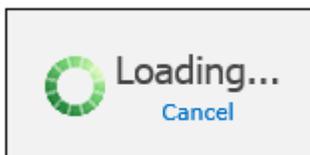
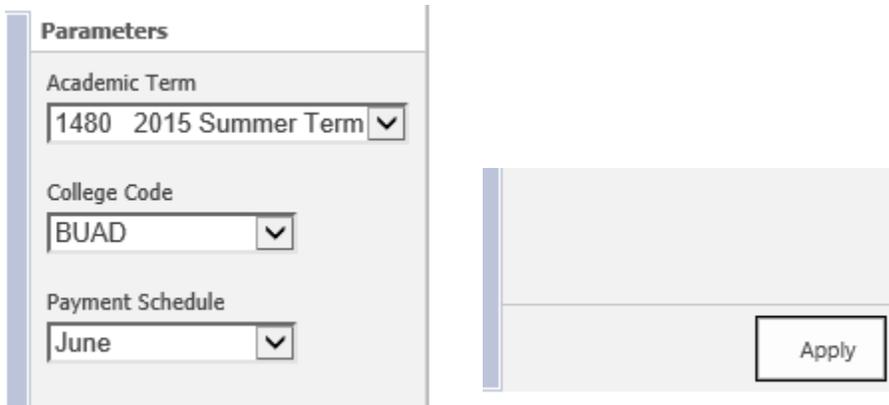
Choices for the College Code include:



Choices for the Payment Schedule include:



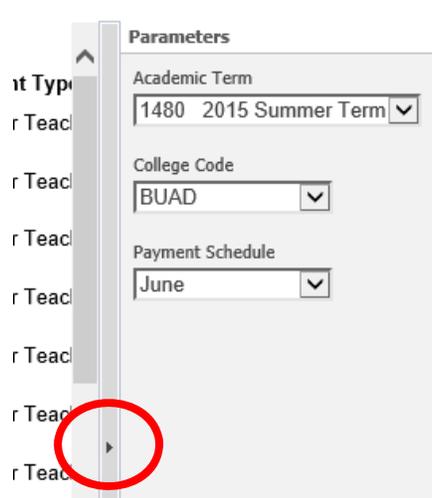
Once all parameters are chosen, click the APPLY button in the lower right corner.



Report data will begin to load.

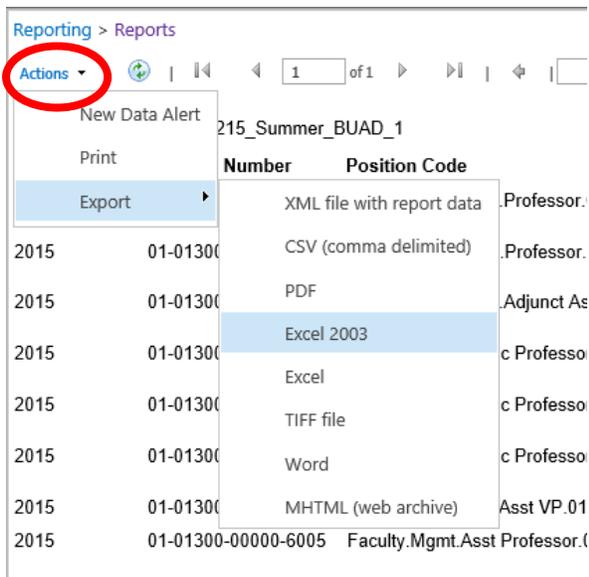
## Summer Teaching Pay for Faculty and Staff

When the report appears, give it a glance to ensure the data appears to be what you expected. If you prefer, you can hide the parameters window by clicking the small black triangle to the right of the report's vertical scrollbar. Use the horizontal scrollbar at the bottom to move left and right. See the Business Intelligence User Guide for more navigation instructions.

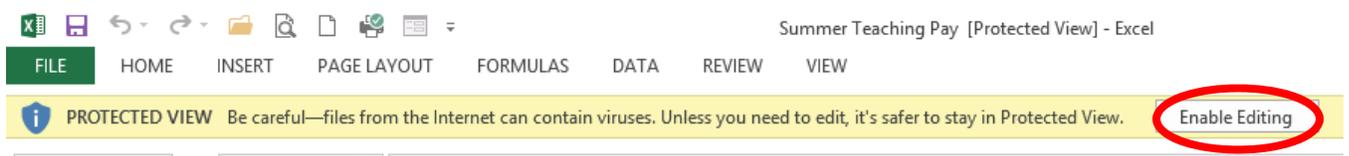


The template may be run multiple times throughout the fiscal year in order to get the most timely/accurate summer course information. However, only one batch may be submitted per college, per pay period.

When ready, **export** the report to **Excel-2003**, using the drop down menu under **Actions**.



Click **Enable Editing**.



# Summer Teaching Pay for Faculty and Staff

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## Batch Layout & Rules for Editing

- Do not delete or rearrange columns! Do not reformat data.
- Batches are sorted alphabetically by first name. Users may change this sorting in Excel, with caution. Be sure to gather all columns and rows when sorting!
- *Batch Name* appears in upper left corner. Do not edit unless instructed by the **Budget Office**.
- *Fiscal Year*: defaults based on the *Pay Date From* on each row.
- *Account Number*: only the RC may be changed.
  - Natural defaults to 6005 (Summer Teaching Pay) for consistency. Note that all payments are directed to this account, regardless if they are full-time or part-time, faculty or staff.
  - RC defaults per discussion with each college’s budget director. To change this default in the future, email a request to the Payroll Manager.
  - All teaching, by default is charged to Unrestricted (00000).
- *Position Code*: populates based on the *Employee Name* as retrieved from PeopleSoft.
- *Employee Name*: populates based on the MU ID number of the individual teaching the course.
- *Amount*: defaults to zero for each row. The **Initiator** must enter the dollar amount(s) to be paid to each employee for each class and pay period (individual rows). **Zero dollar rows are not processed.**
  - For multi-month payment schedules, the amounts to be paid do not have to be split evenly. However, be sure to adjust the *Credit Hours* and *Hours Worked* data accordingly.
- *Payment Type*: defaults to either Summer Pay or Summer Pay TS, per rules in the HR/Payroll system. Do not edit.
- *Asg No*: is the MyJob (Oracle) employee ID number. This populates automatically. Do not edit.
- *Pay Date From/To*: automatically populate per the Payment Schedule parameter chosen. These dates align with the modules/sessions to be paid, as follows:

Module number	Payment date(s)	Notes/exceptions
1 and 4 and 9 and 10	June	LAW-1: 50% each May & June
2 and 5 and 7	50% each July & August	LAW-2: 100% in July
3 and 6	50% each June & July	

- *Hours Worked*: defaults based on credit hours of course using same calculation as academic year.
- *Credit Hours*: defaults to credit hours for that course, per PeopleSoft, divided by the number of pay periods (e.g., 3 credit in Module 2, paid July-Aug, so 1.5 credit hours on each line).
- *Remarks*: a text field that populates automatically to reference the course name/number, section number, and module number (e.g.: ENGL.1001.101.2). Okay to edit.
- **Initiator** creates budget transfer lines on one or more of the blank rows at the bottom, as follows:
  - Available budget can be transferred from salary contingency codes or unallocated salary naturals 6004, 6006 and 6028 (which do not have position detail) as long as there is sufficient available working budget to transfer from.
  - The **Initiator** will enter budget transfer lines including the fiscal year, the account(s) and position code(s) with the corresponding amount(s) as a negative, which will transfer funds to cover the proposed summer teaching payments.
  - If there are multiple *Fiscal Years* on the same spreadsheet, then the funding lines must be two different fiscal years as well. **The net amount of each fiscal year must be zero.**

## Summer Teaching Pay for Faculty and Staff

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When the template is complete, save it in Excel-2003 format in a secure location, for future reference, and proceed with uploading to ImageNow for approval.

### Summer Teaching Pay File Uploads to ImageNow

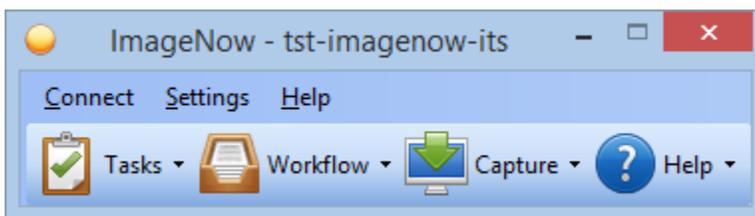
Summer Teaching Pay transaction files are uploaded to the ImageNow system by a department initiator. The file is routed by the ImageNow system to a department approver. After department approval, the file is routed to the Budget Office for review.

#### Uploading Files

To upload the files to ImageNow, log in via the ImageNow client. Your ImageNow username and password is the same as your eMarq account.



After logging in, you should see the ImageNow client toolbar.



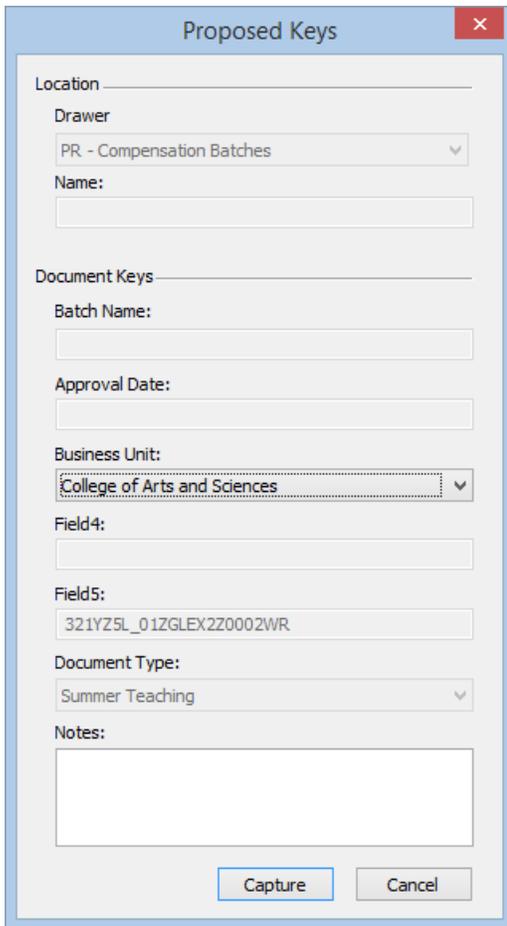
Click the dropdown arrow by the *Capture* button, and choose *PR – Compensation Batch Summer Pay*.

A *Proposed Keys* dialog will appear (see next page).

## Summer Teaching Pay for Faculty and Staff

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Verify the correct *Business Unit* has been selected in the dropdown list, then click *Capture*.

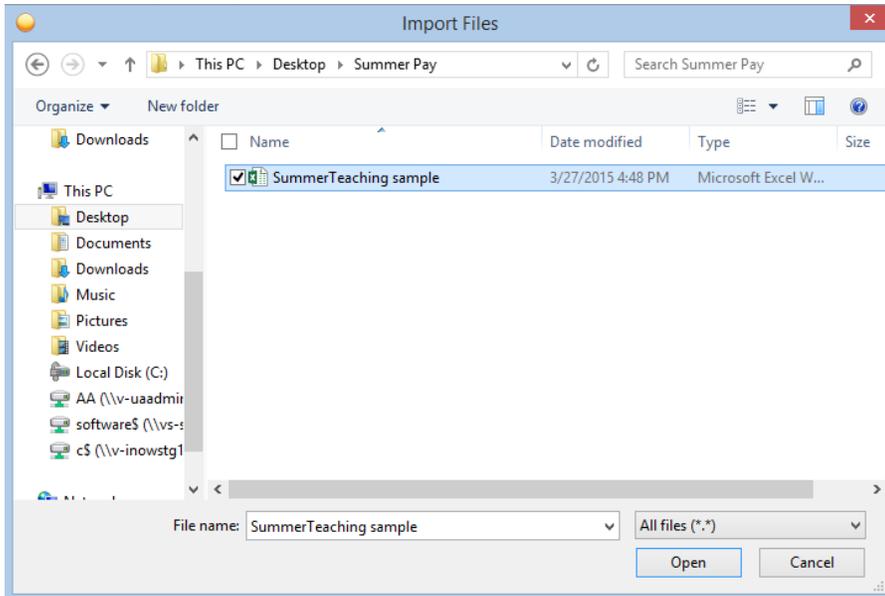


The image shows a dialog box titled "Proposed Keys" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Location:** A text field labeled "Drawer" with a dropdown menu showing "PR - Compensation Batches". Below it is a text field labeled "Name:".
- Document Keys:** A text field labeled "Batch Name:".
- Approval Date:** A text field.
- Business Unit:** A dropdown menu with "College of Arts and Sciences" selected.
- Field4:** A text field.
- Field5:** A text field containing the value "321YZ5L\_01ZGLEX2Z0002WR".
- Document Type:** A dropdown menu with "Summer Teaching" selected.
- Notes:** A large empty text area.

At the bottom of the dialog are two buttons: "Capture" and "Cancel".

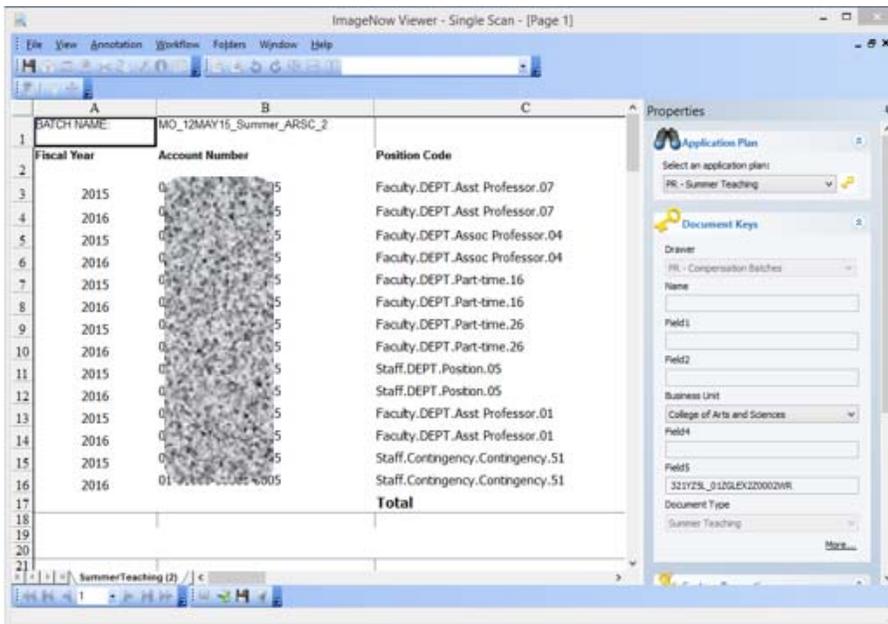
An *Import Files* dialog will appear. Use this to choose the Summer Pay transaction file to be uploaded.



Locate and select the file, then click *Open*.

## Summer Teaching Pay for Faculty and Staff

An ImageNow Viewer window will appear, displaying the file you've selected and some default document properties.



Click the **Save** button  to finish uploading this file to the ImageNow system. After you do, the ImageNow Viewer window should close itself.

The document will be automatically routed to the appropriate department **Approver**. The **Approver** will be notified of a pending batch via email and will either approve or reject the batch.

In either situation, after the **Approver** takes action, the **Initiator** will receive an alert, similar to:

noreply@marquette.edu  
[WebNow STG] A Summer Teaching document has been approved.

**A Summer Teaching document has been approved.**

**Approval Date:** Approved 2015/05/21 10:09:56  
**Business Unit:** College of Health Sciences  
**Approver:** Amy Albrink Schroeder  
**Initiator:** Michelle L. Raclawski

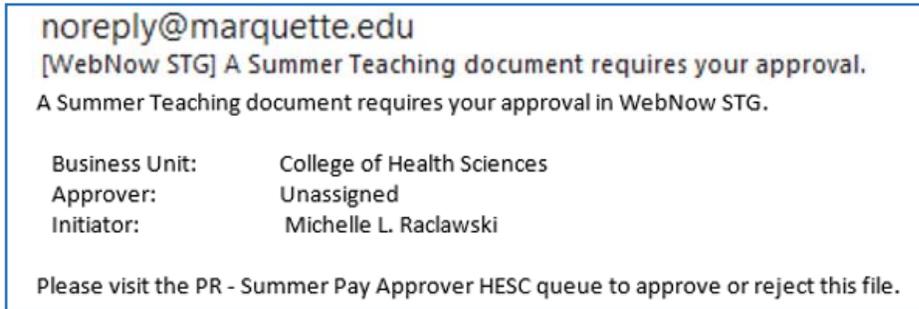
**This document will next be reviewed by the Budget Office.**

# Summer Teaching Pay for Faculty and Staff

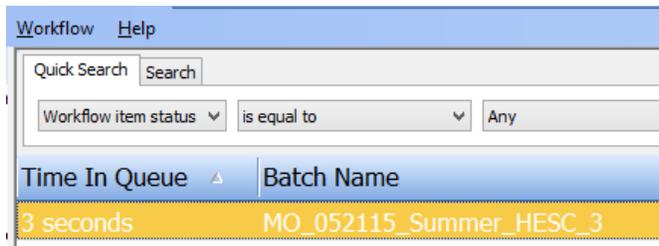
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## Approving Batches in Image Now

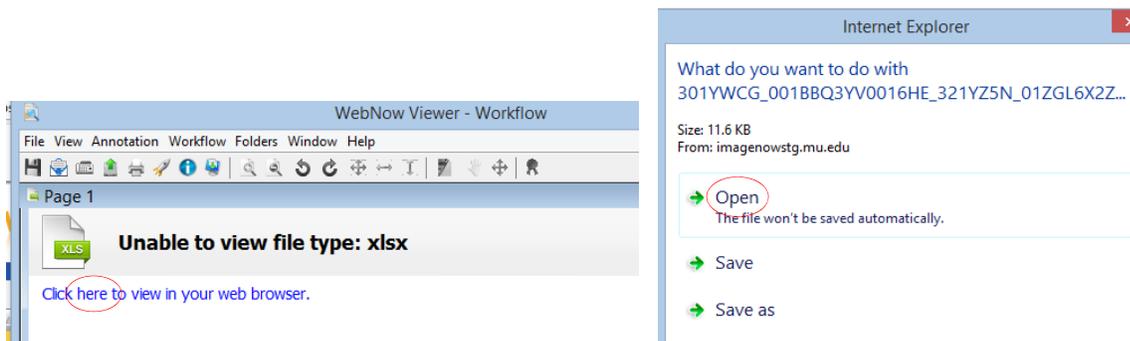
The **Approver** will be notified of a pending batch via email, similar to the one below. A link to the document will be included in the email.



Upon clicking the email link, the **Approver** is automatically taken to the WebNow application. Double click on the batch that you wish to review (anywhere in that row).



Excel will not automatically launch. Instead, click the word “[here](#)” to open the batch for review. Choose to **Open** the file, when prompted.



## Summer Teaching Pay for Faculty and Staff

Review the file for completeness and accuracy. Verify that the appropriate personnel are being paid and that the dollar amounts follow policy or match the summer contracts, as applicable. Double check that the Amount column nets to zero.

BATCH NAME: MO_052115_Summer_COLG_3												
Fiscal Year	Account Number	Position Code	Employee Name	Amount	Payment Type	Asg No	Pay Date From	Pay Date To	Hours Worked	Credit Hours	Future Use	Remarks
2015	01-02510-00000-6005	Faculty		1000	Summer Teaching Pay TS	14168	06/01/2015	06/30/2015	4.5	1.5		NNNN.1234.101.6
2016	01-02510-00000-6005	Faculty		1000	Summer Teaching Pay TS	14168	07/01/2015	07/31/2015	4.5	1.5		NNNN.1234.101.6
2015	01-02650-00000-6005	staff		1000	Summer Teaching Pay TS	14032	06/01/2015	06/30/2015	0	0		NNNN.5678.701.3
2015	01-02450-00000-6006			-2000								
2016	01-02510-00000-6004			-1000								

If corrections are needed, the batch must be rejected and necessary changes communicated to the **Initiator**. The **Initiator** will change their copy of the batch and upload the revised document to ImageNow for review. This ensures that all information is consistently shared across all parties.

**Approvers**, when ready to proceed, close the Excel file. There should not be any changes to save!

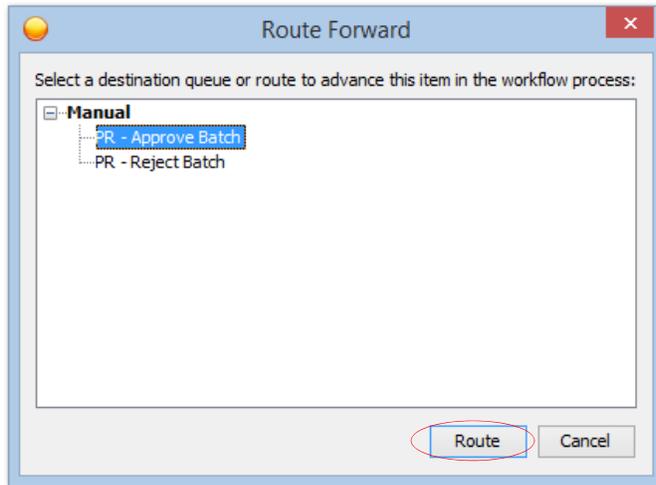
Right-click on the batch that you wish to approve or reject (anywhere in the row). From the pop-menus choose "Workflow" and "Route Forward".

The screenshot shows a table with columns: Type, Pages, Notes, Initiator, Created By, and Create. A row is highlighted in yellow with the text "... Summer Teaching". A right-click context menu is open over this row. The menu items are: Open, Launch Associated Application, Export..., Print..., Copy Selected Grid Rows, Export Grid..., Print Grid..., Merge..., Delete, Remove from Workflow..., Send To, Workflow (circled in red), and Properties. The 'Workflow' sub-menu is open, showing: Preview..., Route Up..., Route Back (circled in red), Route Forward... (circled in red), Route Anywhere..., Recall Workflow Item, Mark Item as Idle, Mark Item as On Hold..., Mark Item as Pending, Mark Item as High Priority, Mark Item as Normal Priority, Mark Item as Low Priority, Archive..., Merge with Viewed Item..., View History, and View Recently Routed Items...

## Summer Teaching Pay for Faculty and Staff

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A new pop-up window will open. Choose either “*PR-Approve Batch*” or “*PR-Reject Batch*”, as appropriate. If you are rejecting a batch remember to communicate the reason to the **Initiator**. Click the **Route** button.

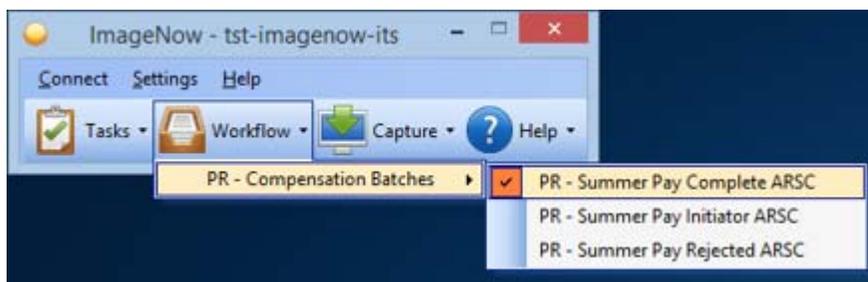


Approved files will be sent to the **Budget Office** for further processing. The system will locate the Batch Name in the uploaded Excel file and attach it to the ImageNow document.

Rejected batches will remain in the ImageNow system, but will not be processed further.

### Viewing Batches in Image Now

After the **Budget Office** processes the batch, they will route the ImageNow document to a *PR – Summer Pay Complete* or *Reject* queue. **Initiators** and **Approvers** can view these completed batches in the ImageNow client by clicking the dropdown arrow by the *Workflow* button on the ImageNow toolbar.

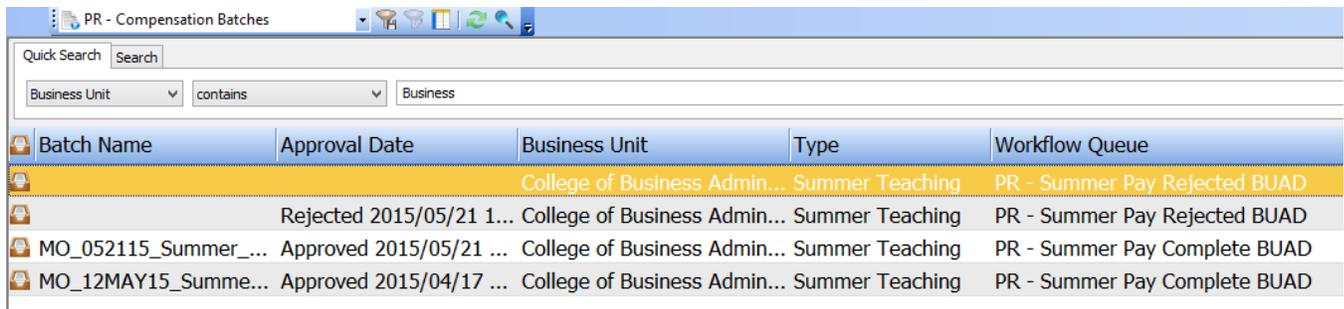


Documents which have been approved and processed can be found in the *PR – Summer Pay Complete* queue. Documents which have been rejected can be found in the *PR – Summer Pay Rejected* queue.

Pending batches may also be reviewed. These appear in the folder view with no Batch Name and no Approval Date. See the yellow row below for an example. This allows the **Initiators** and **Approvers** to follow-up on pending batches as deadlines approach.

## Summer Teaching Pay for Faculty and Staff

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Batch Name	Approval Date	Business Unit	Type	Workflow Queue
		College of Business Admin...	Summer Teaching	PR - Summer Pay Rejected BUAD
	Rejected 2015/05/21 1...	College of Business Admin...	Summer Teaching	PR - Summer Pay Rejected BUAD
MO_052115_Summer_...	Approved 2015/05/21 ...	College of Business Admin...	Summer Teaching	PR - Summer Pay Complete BUAD
MO_12MAY15_Summe...	Approved 2015/04/17 ...	College of Business Admin...	Summer Teaching	PR - Summer Pay Complete BUAD

## Questions

For further assistance, please contact:

- [Amy Ramminger](#), Budget Office for position funding, account number and budget transfer questions.
- [Amy Albrinck Schroeder](#), Comptroller's Office, for ImageNow or BI reporting (template) questions.
- [IT Services Help Desk](#) for technical assistance.