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

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

Choices for the College Code include:

<table>
<thead>
<tr>
<th>College Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARSC</td>
</tr>
<tr>
<td>BUAD</td>
</tr>
<tr>
<td>COMM</td>
</tr>
<tr>
<td>EDUC</td>
</tr>
<tr>
<td>ENGI</td>
</tr>
<tr>
<td>HESC</td>
</tr>
<tr>
<td>LAW</td>
</tr>
<tr>
<td>NURS</td>
</tr>
<tr>
<td>PRST</td>
</tr>
</tbody>
</table>

Choices for the Payment Schedule include:

<table>
<thead>
<tr>
<th>Payment Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-June</td>
</tr>
<tr>
<td>June</td>
</tr>
<tr>
<td>July</td>
</tr>
<tr>
<td>June-July</td>
</tr>
<tr>
<td>July-August</td>
</tr>
</tbody>
</table>

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

Report data will begin to load.
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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.
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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:

<table>
<thead>
<tr>
<th>Module number</th>
<th>Payment date(s)</th>
<th>Notes/exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 and 4 and 9 and 10</td>
<td>June</td>
<td>LAW-1: 50% each May &amp; June</td>
</tr>
<tr>
<td>2 and 5 and 7</td>
<td>50% each July &amp; August</td>
<td>LAW-2: 100% in July</td>
</tr>
<tr>
<td>3 and 6</td>
<td>50% each June &amp; July</td>
<td></td>
</tr>
</tbody>
</table>

- *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.**
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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 (Perceiptive Content) username and password is the same as your eMarq account.

![ImageNow login page](image)

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

![ImageNow client toolbar](image)

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

A **Proposed Keys** dialog will appear (see next page).
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Verify the correct Business Unit has been selected in the dropdown list, then click Capture.

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.
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:

Subject: [PEX INT] A Summer Teaching document has been approved.

NOTE: THIS MESSAGE WAS SENT FROM PEX INT, NOT PEX PRODUCTION.

A Summer Teaching document has been approved.

Approval Date: Approved 2019/10/24 11:17:11
Business Unit: College of Nursing
Approver: Dawn Turzinski
Initiator: Dawn Turzinski

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

Subject: [PEX INT] A Summer Teaching document requires your approval.

NOTE: THIS MESSAGE WAS SENT FROM PEX INT, NOT PEX PRODUCTION.

A Summer Teaching document requires your approval in PEX INT.

Business Unit: College of Nursing
Approver: Unassigned
Initiator: Dawn Turzinski

Please visit the PR - Summer Pay Approver NURS queue to approve or reject this file.

Link: https://pexint.mu.edu/pex/#workflow/view/321YZ5X_02029K1PN0044YM

Upon clicking the email link, the Approver is taken to the PEX application for logon. (There is a period of time that the browser will hold your logon credentials and log you back in, if you are clicking on an additional link.)

After logging in you will get the below screen. Click Search without entering any text in the search window. This will bring up the documents you are working on in the queue specified in the email.
Double click on the batch that you wish to review (anywhere in that row).

<table>
<thead>
<tr>
<th>Time In Queue</th>
<th>Batch Name</th>
<th>Approval Date</th>
<th>Business Unit</th>
<th>Initiator</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 hours 9 minutes 31 sec...</td>
<td></td>
<td></td>
<td>College of Nursing</td>
<td>Dawn Turzinski</td>
</tr>
<tr>
<td>5 days 20 hours 36 min...</td>
<td></td>
<td></td>
<td>College of Nursing</td>
<td>David Teran</td>
</tr>
</tbody>
</table>

Excel will not automatically launch. So you will need to download the document. See below: Click download icon, shown circled in red.

Once the document is downloaded, click Open. Excel will launch.
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.

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.

If no corrections are needed, close the Excel file. There should not be any changes to save!

Whether approving or rejecting, select the Route Forward icon , shown circled in red.

Then 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 offline.
Once you select the appropriate option the document will be automatically routed and you will be brought back to the queue screen.

If complete, disconnect your session by selecting the **Disconnect** person-shaped icon in the top right corner of your screen, shown circled in red.

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.
Questions

For further assistance, please contact:

- Amy Ramminger, Budget Office for position funding, account number and budget transfer questions.
- Dawn Turzinski, Comptroller’s Office, for ImageNow or BI reporting (template) questions.
- IT Services Help Desk for technical assistance.