Faculty Workload

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Faculty Workload Overview

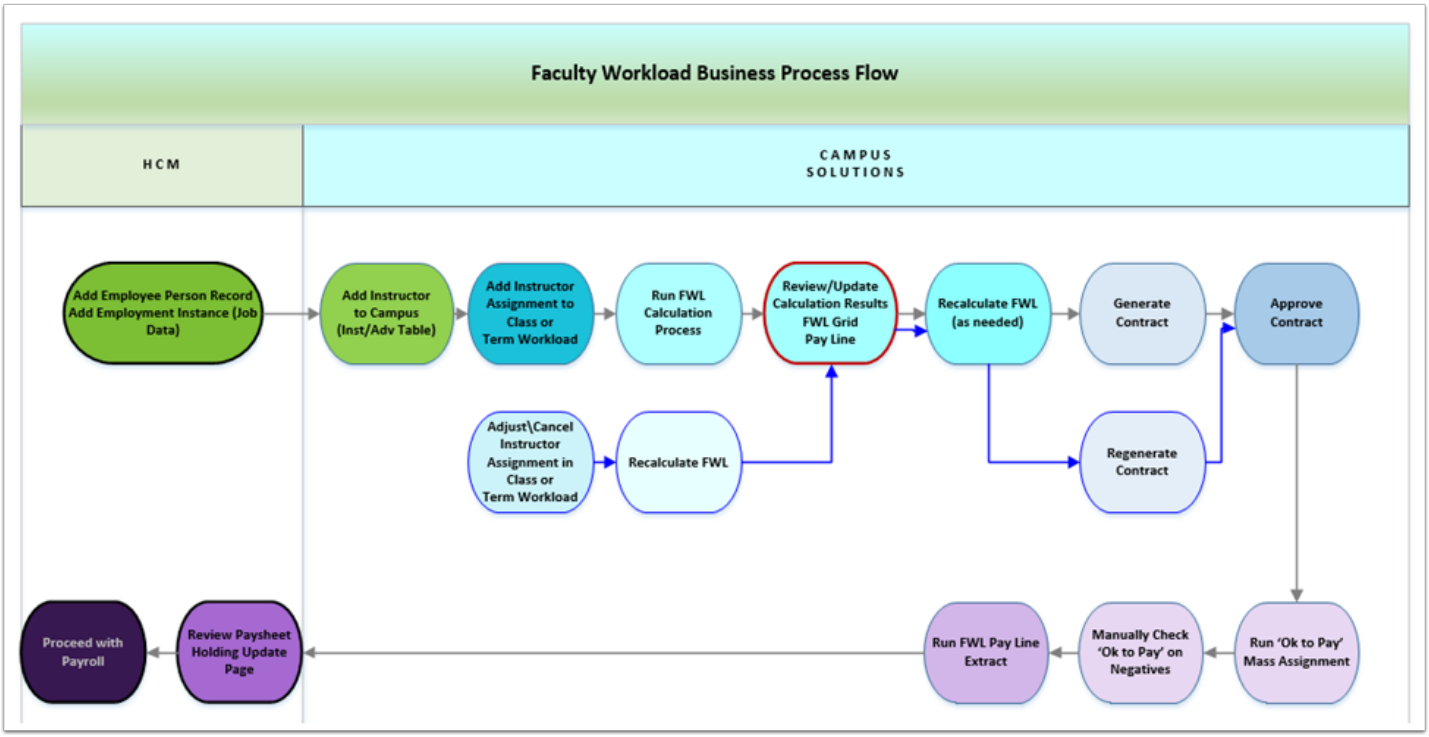
Understanding the FWL Pay Line

Purpose: Use this document as a reference for understanding how the CS to HCM Pay Line is generated, changes on recalculation, is updated for Earn Code and Account Code changes, handles reductions in pay, allows pay to be sent to payroll and reflects payments already sent.

Audience: Class Scheduling Staff, HR\Payroll Staff

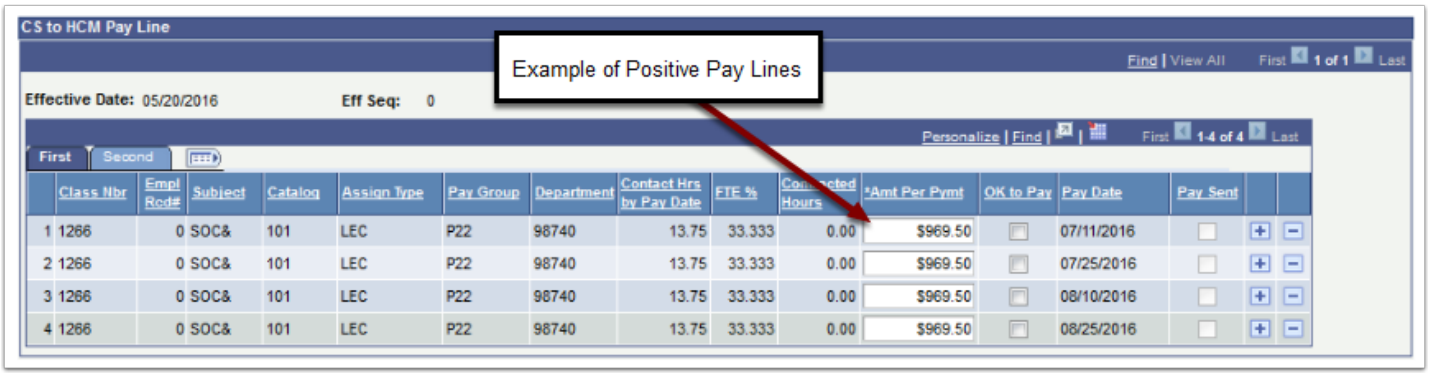
Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

The **FWL Pay Line** (CS to HCM Pay Line) section of the HCM Data Info page is part of the **Maintain Faculty Workload** component, which is the heart of the Faculty Workload process in that it serves as a "workspace" to store pertinent data. The **Pay Line** exists in the same component as the **FWL Grid** and **Calculation Results** and is half-way through the FWL process.

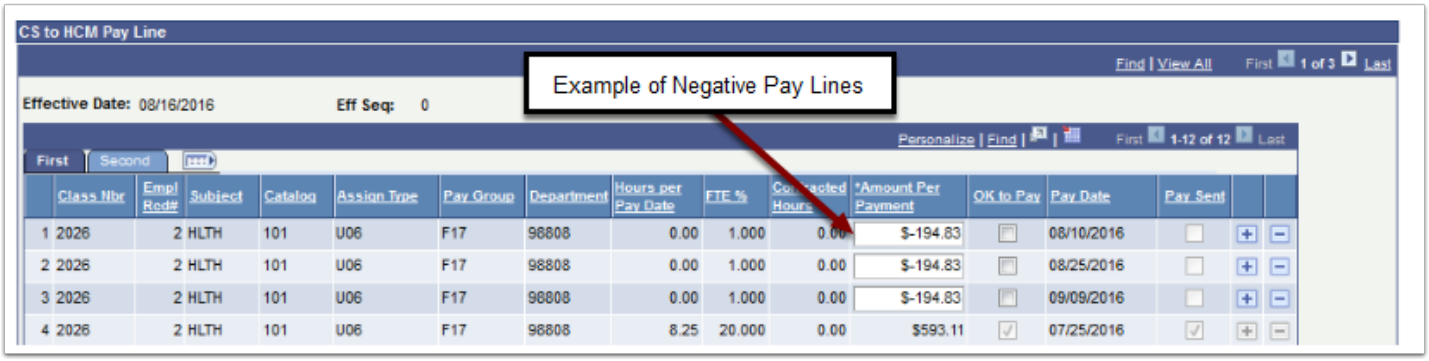


The **FWL Pay Line** is refreshed each time a calculation is performed IF the **Total Pay** value on a contract is greater than zero ($0), or if a contract does not generate pay, but is retracting pay that has already been sent to payroll, then negative **Pay Lines** will appear, even though the **Total Pay** is $0.

FWL Pay Line will Calculate the correct number of payments based on individual Class start and end date. The class to be removed completely from CS to HCM pay line when there is no pay sent. The pay amount and hours will adjust for decrement/ increment in total salary.

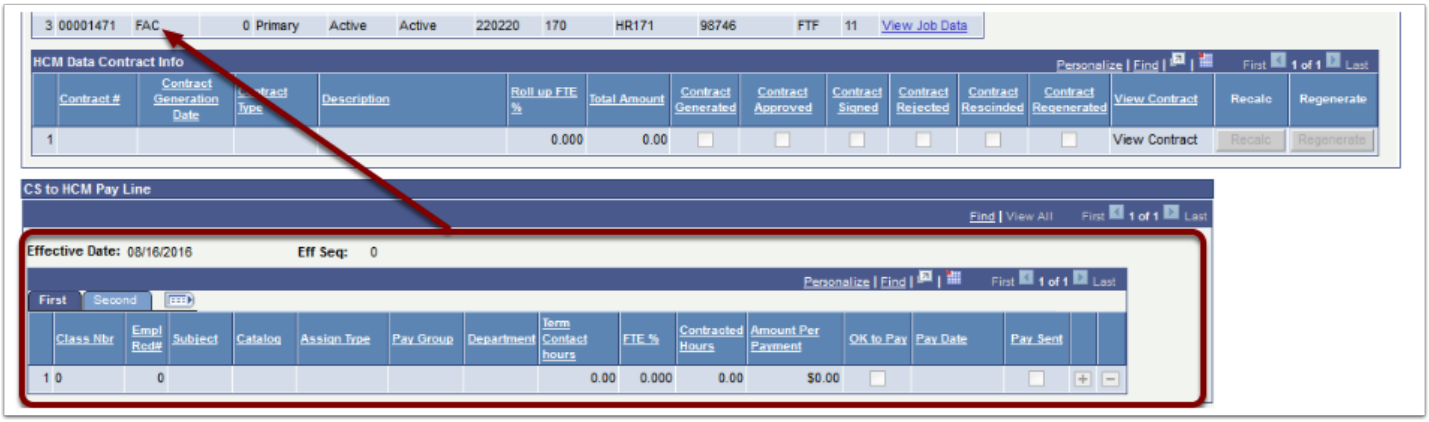


	Class Nbr	Empl Rcd#	Subject	Catalog	Assign Type	Pay Group	Department	Contact Hrs by Pay Date	FTE %	Contracted Hours	*Amt Per Pymt	OK to Pay	Pay Date	Pay Sent
1	1266	0	SOC&	101	LEC	P22	98740	13.75	33.333	0.00	$969.50		07/11/2016	
2	1266	0	SOC&	101	LEC	P22	98740	13.75	33.333	0.00	$969.50		07/25/2016	
3	1266	0	SOC&	101	LEC	P22	98740	13.75	33.333	0.00	$969.50		08/10/2016	
4	1266	0	SOC&	101	LEC	P22	98740	13.75	33.333	0.00	$969.50		08/25/2016	



	Class Nbr	Empl Rcd#	Subject	Catalog	Assign Type	Pay Group	Department	Hours per Pay Date	FTE %	Contracted Hours	*Amount Per Payment	OK to Pay	Pay Date	Pay Sent
1	2026	2	HLTH	101	U06	F17	98808	0.00	1.000	0.00	$-194.83		08/10/2016	
2	2026	2	HLTH	101	U06	F17	98808	0.00	1.000	0.00	$-194.83		08/25/2016	
3	2026	2	HLTH	101	U06	F17	98808	0.00	1.000	0.00	$-194.83		09/09/2016	
4	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11	✓	07/25/2016	✓

Upon initial calculation the **Pay Line** will appear in 'draft' form, meaning no payments can be picked up and sent to payroll. If the calculation process is run for a *Full-Time Faculty* and their class assignments are all attributed to '*regular load*' the **Pay Line** will not display any values. No contract would be generated, since no Pay Line record exists.

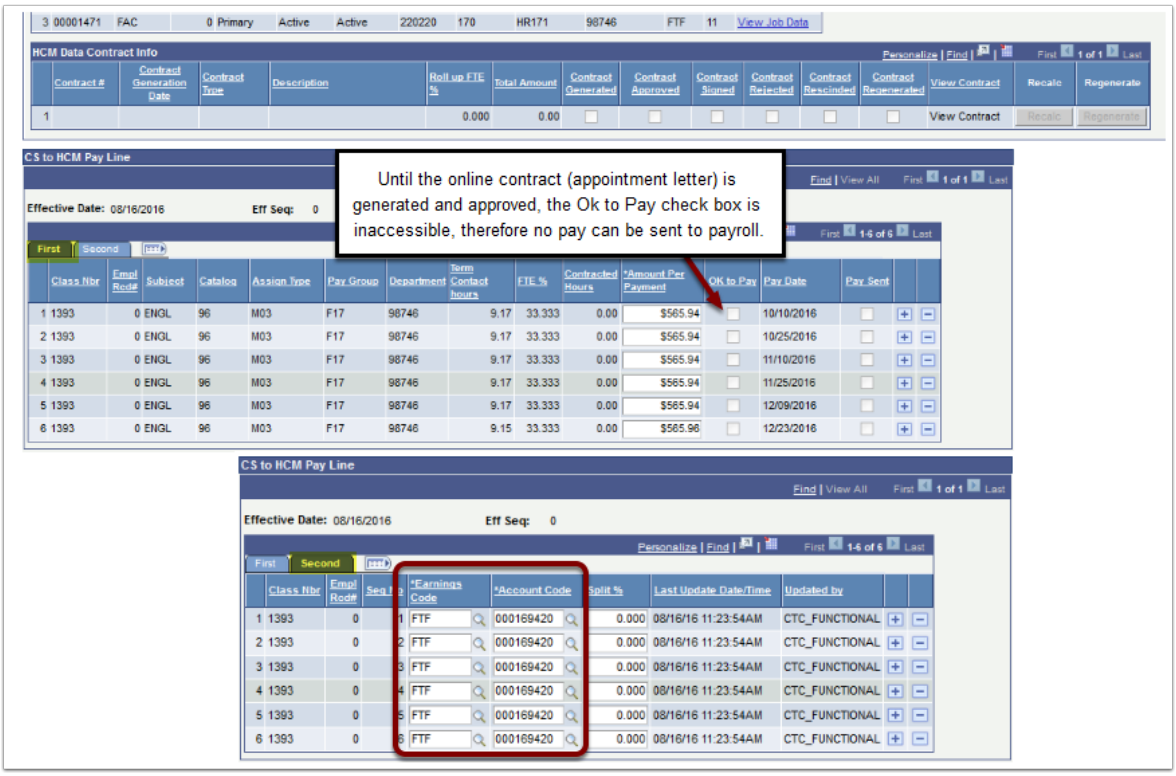


	Contract #	Contract Generation Date	Contract Type	Description	Roll up FTE %	Total Amount	Contract Generated	Contract Approved	Contract Signed	Contract Rejected	Contract Rescinded	Contract Regenerated	View Contract	Recalc	Regenerate
1					0.000	0.00							View Contract	Recalc	Regenerate

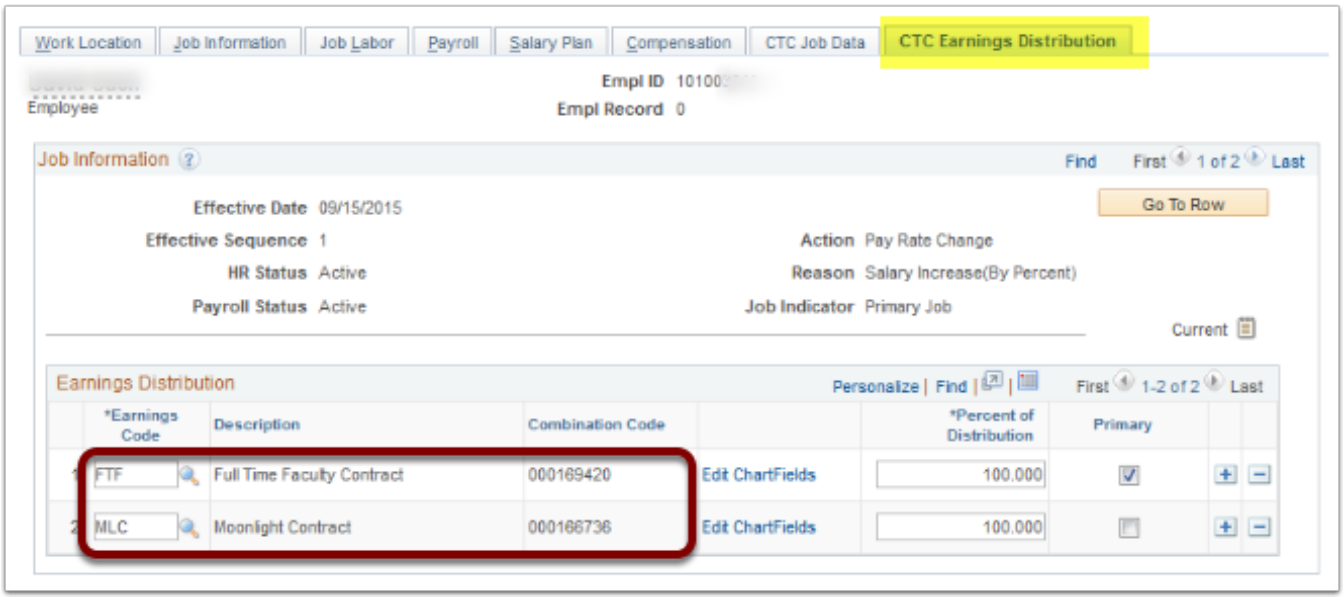
	Class Nbr	Empl Rcd#	Subject	Catalog	Assign Type	Pay Group	Department	Term Contact hours	FTE %	Contracted Hours	Amount Per Payment	OK to Pay	Pay Date	Pay Sent
1	0	0						0.00	0.000	0.00	$0.00			

If the calculation process is run for a *Full-Time Faculty* and some class assignments are attributed to '*regular load*' and others are attributed to 'Moonlight' pay, then a **Pay Line** will display only for those classes being paid via FWL for their moonlight assignment. No contract would be generated for their regular load, but a Moonlight contract would generate for that portion of the pay. Upon initial calculation or even subsequent recalculation the Pay Line will exist in 'draft' form until such time as the contract has been generated and approved.

> **Note:** Need more information on generating online contracts (appointment letters)? Refer to the Quick Reference Guide - FWL Contract Generation (Batch)

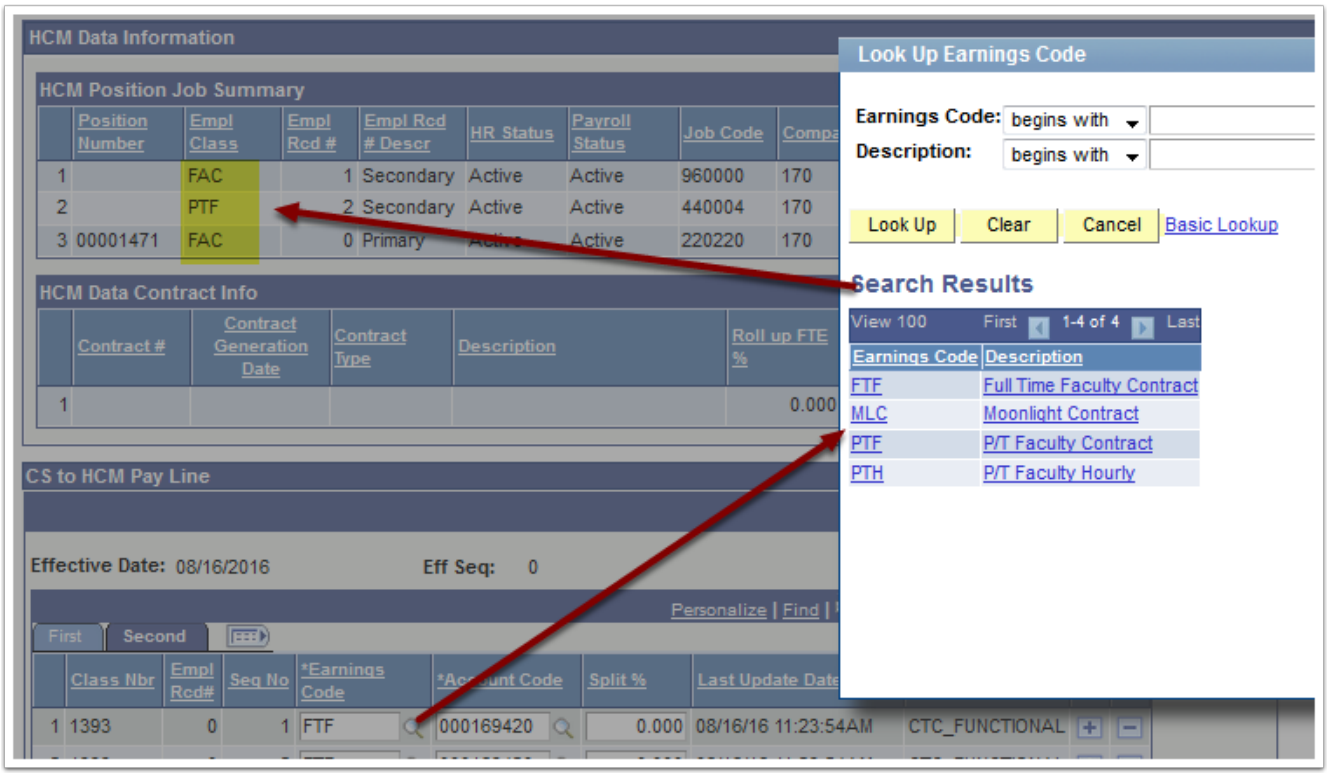


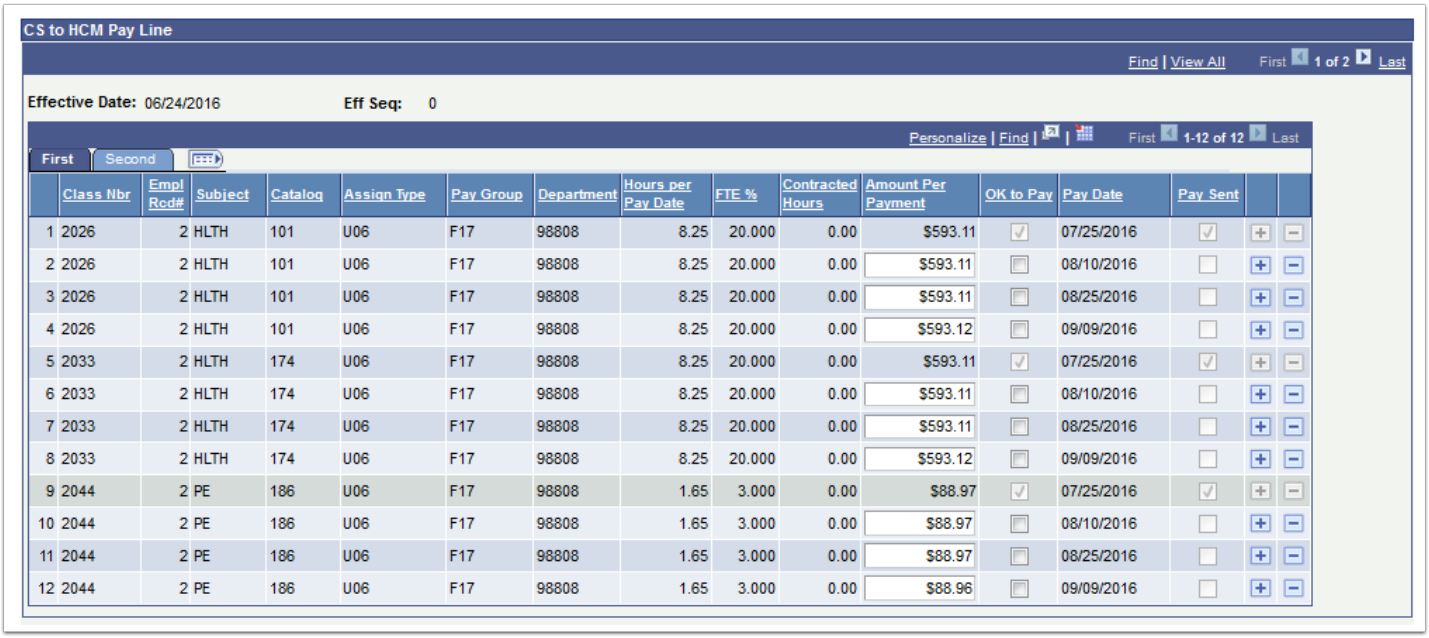
Depending on how the **Job Data** record is established, there may be multiple **Earnings Codes** tied to the Full-Time Faculty job on the **CTC Earnings Distribution** page in HCM. It is highly possible that the system will pick the first record on that page and that may not be the desired '*MLC*' **Earnings Code** and **Combo Code**, if so these values must be updated.



If the **Earnings Code** or **Combo Code** require changing on the **Pay Line**, this needs to be completed prior to generating the online Contract (appointment letter) or the contract will not have the appropriate **Earnings Code** displayed. Use the **Earnings Code** lookup to find the **Earnings Code** available and select the correct coding to ensure the pay is coming out of the right budget. Make sure to updated EACH line on the **Pay Line** and click **Save**.

> ⚠ **Warning:** Keep in mind that at this time (enhancement pending) the lookup displays all Earnings Code for all employee record numbers tied to the instructor, not just those associated with the **Empl Rcd#** displayed on the **Pay Line**. The same is true for the **Account Code** (*Combo Code*) field, so caution is advised when updating these values on the **Pay Line** to ensure that the right codes for that job are selected. Use the **View Job Data** link to view the **CTC Earnings Distribution** page if needed to confirm.





	Class Nbr	Empl Rcd#	Subject	Catalog	Assign Type	Pay Group	Department	Hours per Pay Date	FTE %	Contracted Hours	Amount Per Payment	OK to Pay	Pay Date	Pay Sent
1	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11	✓	07/25/2016	✓
2	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11		08/10/2016	
3	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11		08/25/2016	
4	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.12		09/09/2016	
5	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.11	✓	07/25/2016	✓
6	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.11		08/10/2016	
7	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.11		08/25/2016	
8	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.12		09/09/2016	
9	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.97	✓	07/25/2016	✓
10	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.97		08/10/2016	
11	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.97		08/25/2016	
12	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.96		09/09/2016	

CS to HCM Pay Line

Find | View All First 1 of 2 Last

Effective Date: 06/24/2016 **Eff Seq:** 0

Personalize | Find | First 1-12 of 12 Last

First Second

	Class Nbr	Empl Rcd#	Seq No	Earnings Code	Account Code	Split %	Last Update Date/Time	Updated by
1	2026	2	1	PTF	000161951	0.000	08/16/16 10:28:48AM	CTC_FUNCTIONAL
2	2026	2	2	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
3	2026	2	3	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
4	2026	2	4	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
5	2033	2	1	PTF	000161951	0.000	08/16/16 10:28:48AM	CTC_FUNCTIONAL
6	2033	2	2	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
7	2033	2	3	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
8	2033	2	4	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
9	2044	2	1	PTF	000161951	0.000	08/16/16 10:28:48AM	CTC_FUNCTIONAL
10	2044	2	2	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
11	2044	2	3	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897
12	2044	2	4	PTF	000161951	0.000	06/24/16 3:06:56PM	101002897

HCM Data Contract Info

Personalize | Find | First 1 of 1 Last

	Contract #	Contract Generation Date	Contract Type	Description	Roll up FTE %	Total Amount	Contract Generated	Contract Approved	Contract Signed	Contract Rejected	Contract Rescinded	Contract Regenerated	View Contract	Recalc	Regenerate
1	172216577	06/24/2016	U06	Summer Effort [ATHL]	43.000	5100.77	☑	☑	☐	☐	☐	☐	View Contract	Recalc	Regenerate

CS to HCM Pay Line

Find | View All First 1 of 2 Last

Effective Date: 06/24/2016 **Eff Seq:** 0

Personalize | Find | First 1-12 of 12 Last

First Second

	Class Nbr	Empl Rcd#	Subject	Catalog	Assign Type	Pay Group	Department	Hours per Pay Date	FTE %	Contracted Hours	*Amount Per Payment	OK to Pay	Pay Date	Pay Sent
1	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11	☑	07/25/2016	☐
2	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11	☐	08/10/2016	☐
3	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.11	☐	08/25/2016	☐
4	2026	2	HLTH	101	U06	F17	98808	8.25	20.000	0.00	$593.12	☐	09/09/2016	☐
5	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.11	☑	07/25/2016	☐
6	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.11	☐	08/10/2016	☐
7	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.11	☐	08/25/2016	☐
8	2033	2	HLTH	174	U06	F17	98808	8.25	20.000	0.00	$593.12	☐	09/09/2016	☐
9	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.97	☑	07/25/2016	☐
10	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.97	☐	08/10/2016	☐
11	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.97	☐	08/25/2016	☐
12	2044	2	PE	186	U06	F17	98808	1.65	3.000	0.00	$88.96	☐	09/09/2016	☐

Note: For information on how to run the FWL Calculation Process to load or update the FWL Pay Line, refer to the Quick Reference Guide - FWL Calculation Process (Batch).

Understanding FWL Calculation Results

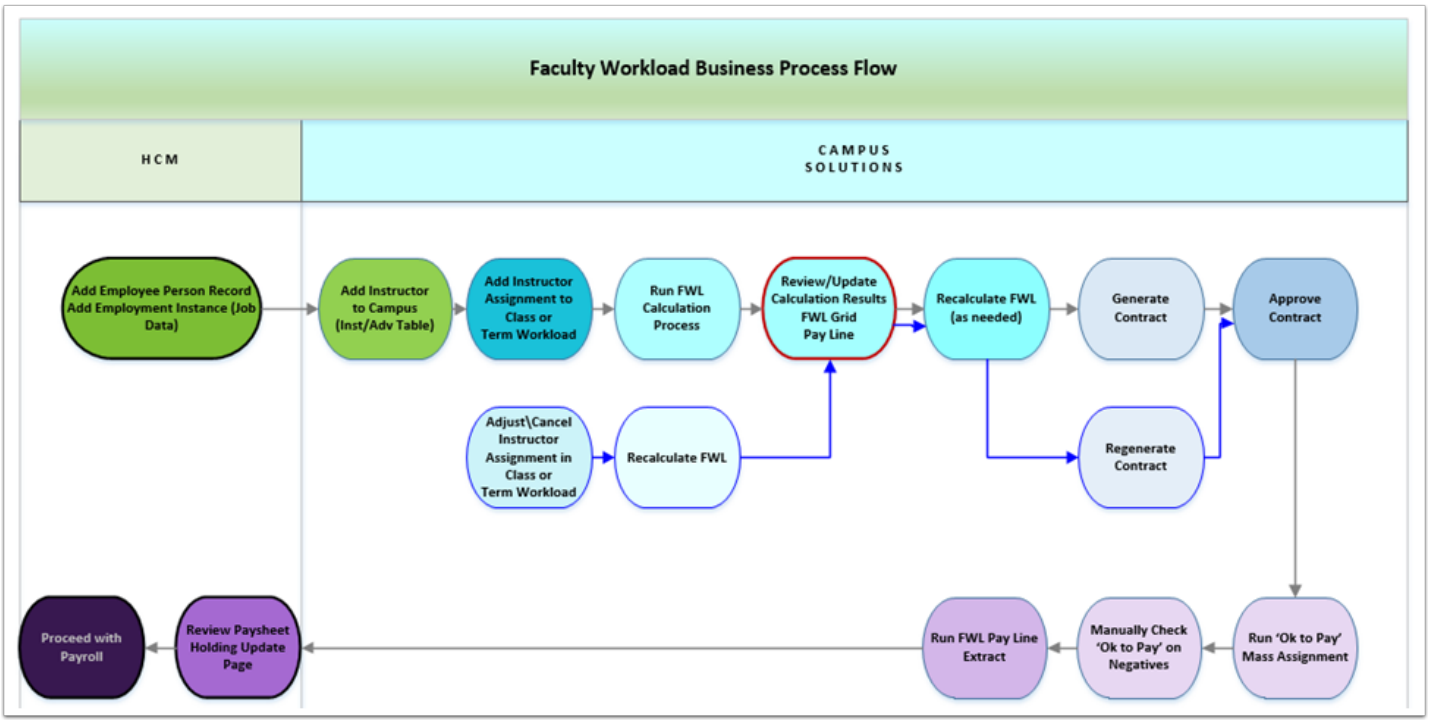
Purpose: Use this document as a reference for understanding how the Calculation Results page within the Maintain Faculty Workload component is loaded, changes upon recalculation and can differ in appearance from Contract Type to Contract Type.

Audience: Class Scheduling Staff, HR\Payroll Staff

Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

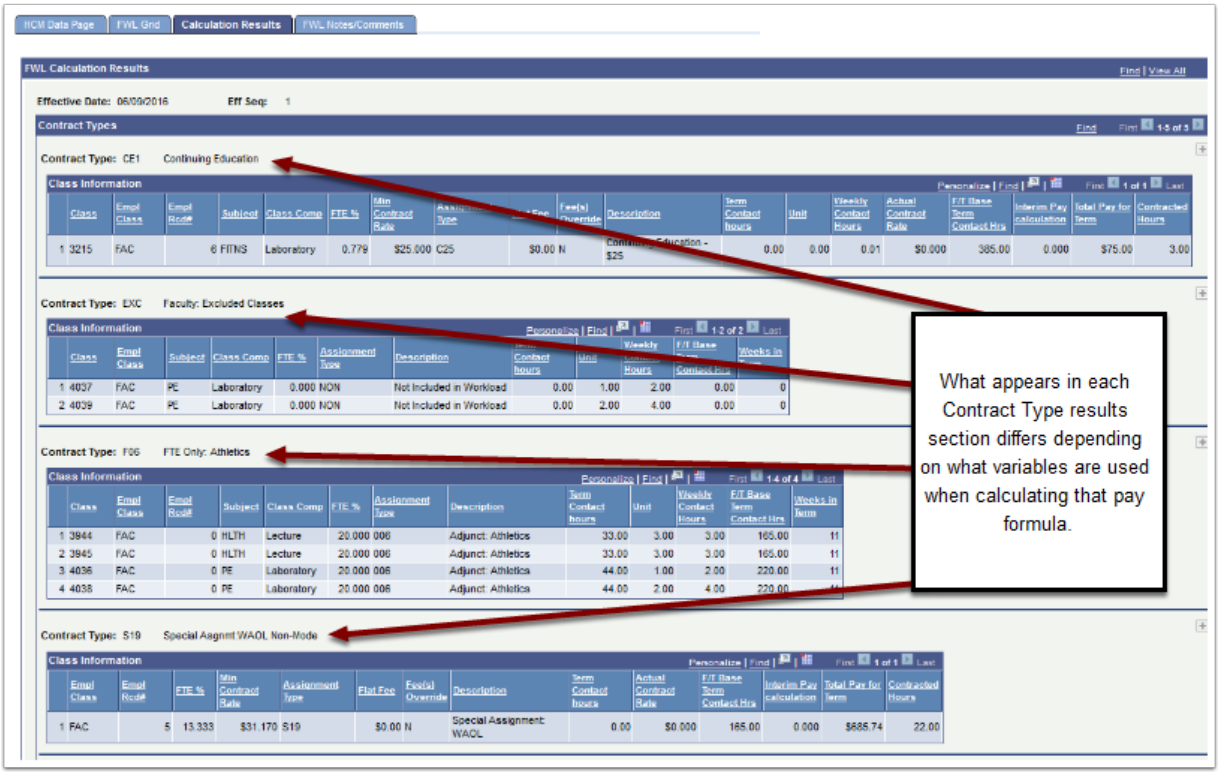
Overview of FWL Calculation Results

The **FWL Calculation Results** page is part of the **Maintain Faculty Workload** component, which is the heart of the Faculty Workload process in that it serves as a "workspace" to store pertinent data. The **Calculation Results** page exists in the same component as the **FWL Grid** and **CS to HCM Pay Line** and is half-way through the FWL process. The page is refreshed each time a calculation is performed. Contracts where changes have occurred will appear with new data, those without changes will simply be carried forward so that the latest record shows the **Calculation Results** for all current **Contract Types**. All results on the page are display only as all changes that would impact a contract are made on the FWL Grid page.



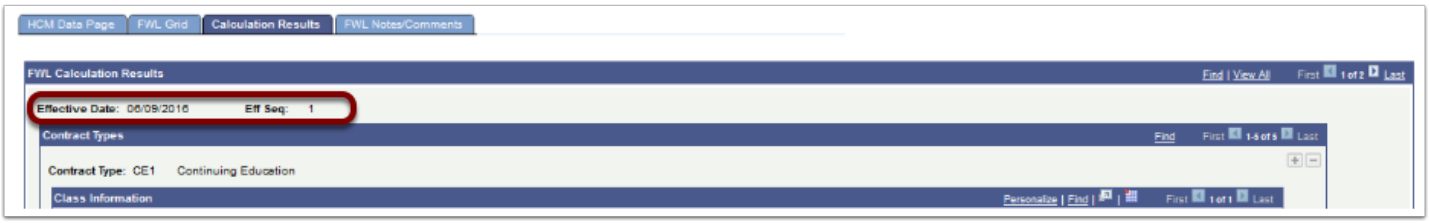
The **FWL Calculation Results** page stores the relevant variables used in each calculation. The results displayed vary by contract (pay formula), meaning the fields you see on the results page

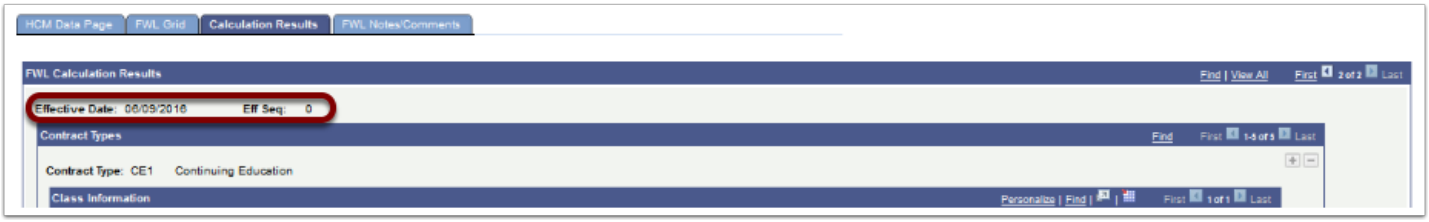
will be different depending on how each contract is calculated. If Term Max Load Rate is used in the calculation, it will appear in the result for that contract, but if Minimum [hourly] Rate is used, then this will display rather than the Term Max Load Rate.

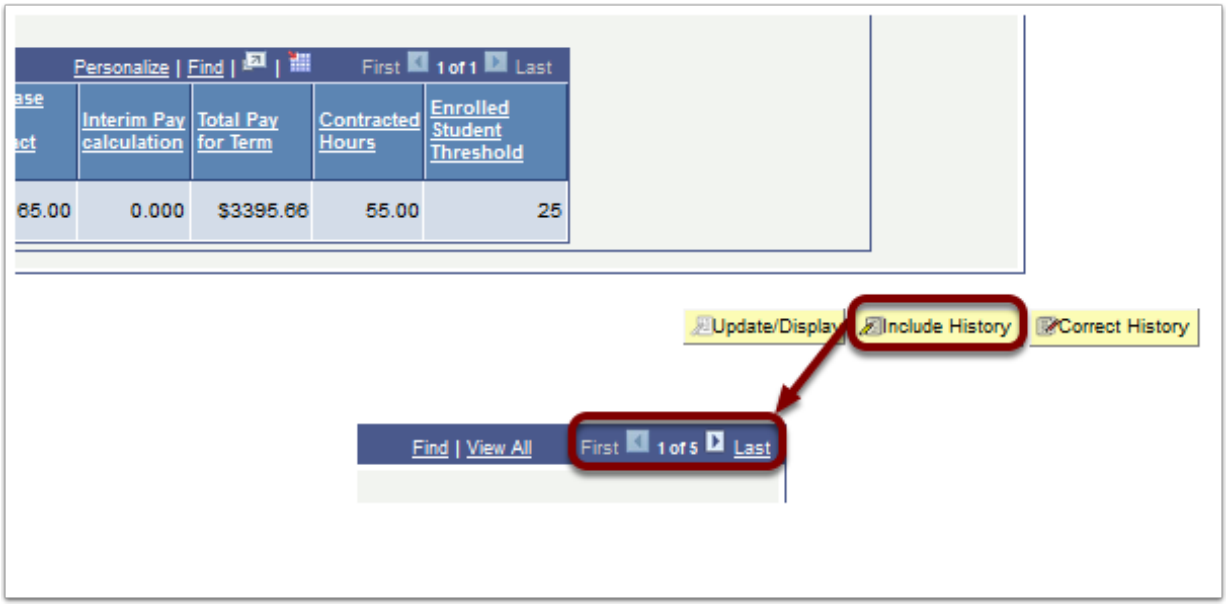


The **FWL Calculation Results** page, like each page in the **Maintain Faculty Workload** component, generates a new 'current' view with the **Effective Date** of the initial calculation or recalculation. If more than one recalculation occurs on the same day, the **Effective Sequence** number increments up. Upon first accessing the FWL record, only the latest **Effective Date/Effective Sequence** data is visible In the upper, right hand corner of the page the user can click through each **Effective Sequence** on the latest **Effective Date** to view the calculation history that occurred on that latest **Effective Date.**

To view all **Calculation Results** every generated for the term, click the **Include History** link on the button, left hand corner. In the example below there are two **Calculation Results** visible with the **Effective Date** of 06/09/2016. When **Include History** is clicked, the record count goes up to 5.







The Calculation Results will be displayed regardless of whether the calculation generates pay. In this way the user can see when the system calculates and excludes classes from pay or generates FTE% only to record a Full-Time Faculty regular load.

Contract Type: EXC Faculty: Excluded Classes

Class Information Personalize | Find | First 1-2 of 2 Last

	Class	Empl Class	Subject	Class Comp	FTE %	Assignment Type	Description	Term Contact hours	Unit	Weekly Contact Hours	F/T Base Term Contact Hrs	Weeks in Term
1	4037	FAC	PE	Laboratory	0.000	NON	Not Included in Workload	0.00	1.00	2.00	0.00	0
2	4039	FAC	PE	Laboratory	0.000	NON	Not Included in Workload	0.00	2.00	4.00	0.00	0

Contract Type: F06 FTE Only: Athletics

Class Information Personalize | Find | First 1-4 of 4 Last

	Class	Empl Class	Empl Rcd#	Subject	Class Comp	FTE %	Assignment Type	Description	Term Contact hours	Unit	Weekly Contact Hours	F/T Base Term Contact Hrs	Weeks in Term
1	3944	FAC	0	HLTH	Lecture	20.000	006	Adjunct: Athletics	33.00	3.00	3.00	165.00	11
2	3945	FAC	0	HLTH	Lecture	20.000	006	Adjunct: Athletics	33.00	3.00	3.00	165.00	11
3	4036	FAC	0	PE	Laboratory	20.000	006	Adjunct: Athletics	44.00	1.00	2.00	220.00	11
4	4038	FAC	0	PE	Laboratory	20.000	006	Adjunct: Athletics	44.00	2.00	4.00	220.00	11

Note: The Calculation Results appears after the FWL Calculation Process is run. For information on how to run the FWL Calculation Process in batch to load the FWL Grid and Calculation Results, refer to the Quick Reference Guide - FWL Calculation Process (Batch).

Understanding FWL Grid

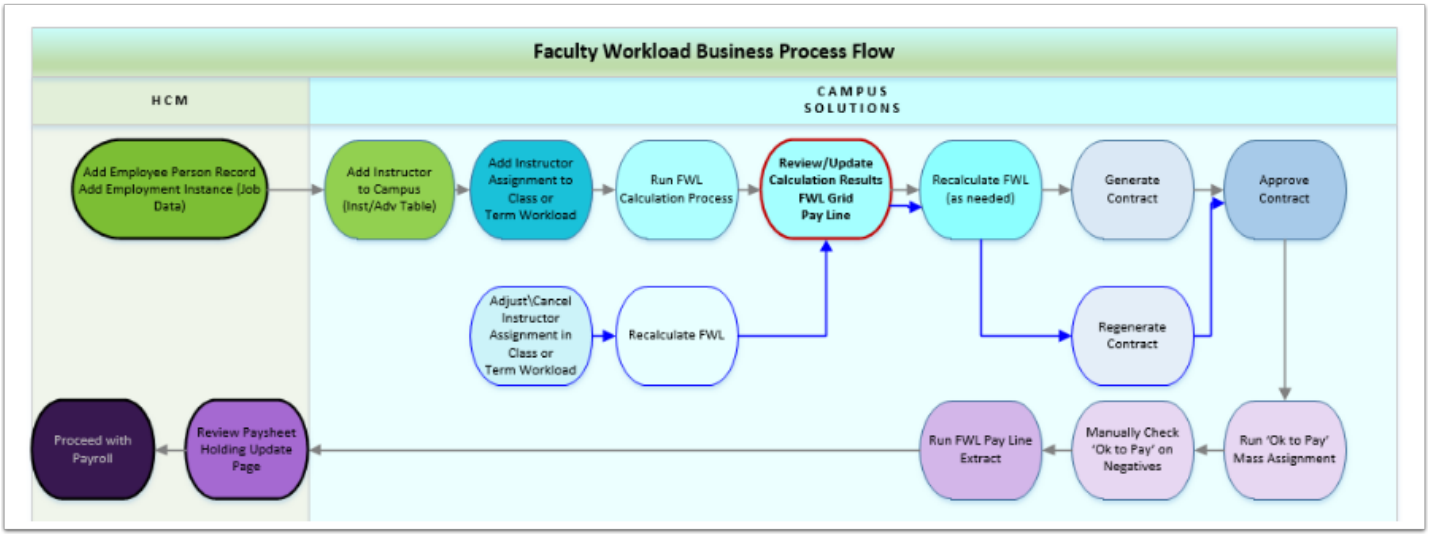
Purpose: Use this document as a reference for understanding how to change the appearance of the FWL Grid page, the data sources for the FWL Grid, and how data is managed/updated within the page.

Audience: Class Scheduling Staff, HR\Payroll Staff

Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Overview of FWL Grid

The **FWL Grid** page is part of the **Maintain Faculty Workload** component, which is the heart of the Faculty Workload process in that it serves as a "workspace" to store pertinent data. The FWL Grid allows staff to add or edit data to reach the proper calculation. This page, sits half way through the business flow of processing Faculty pay, between adding the instructor assignments (using Assignment Types) in class and generating an online contract (appointment letter) to send pay to payroll.



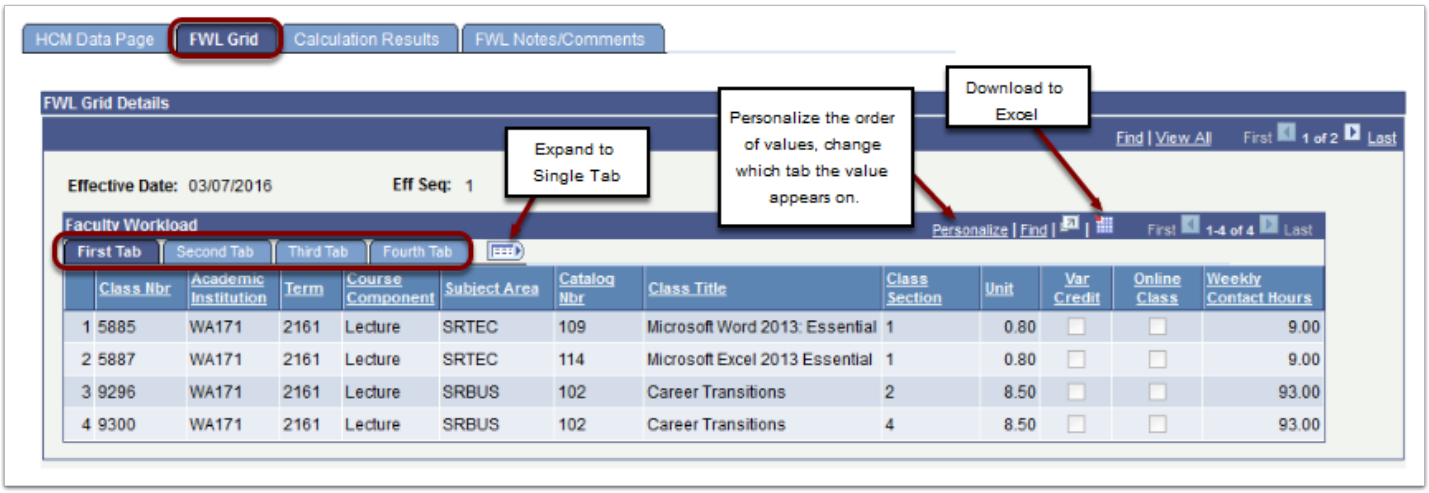
All relevant data is loaded into the **FWL Grid** as a result of the **FWL Calculation Process** from the following pages:

- Schedule of Class
- Instructor Term Workload
- Assignment Type Configuration
- FWL Contract Configuration (Formula)

The **FWL Grid** is refreshed each time a recalculation is executed, either from the **FWL Calculation Process** (batch*) or from the **Recalc** buttons on the **Maintain Faculty Workload** page. All **Effective Dated/Effective Sequenced** 'snapshots' of the **FWL Grid** are kept in history if needed to research the pay changes that have occurred.

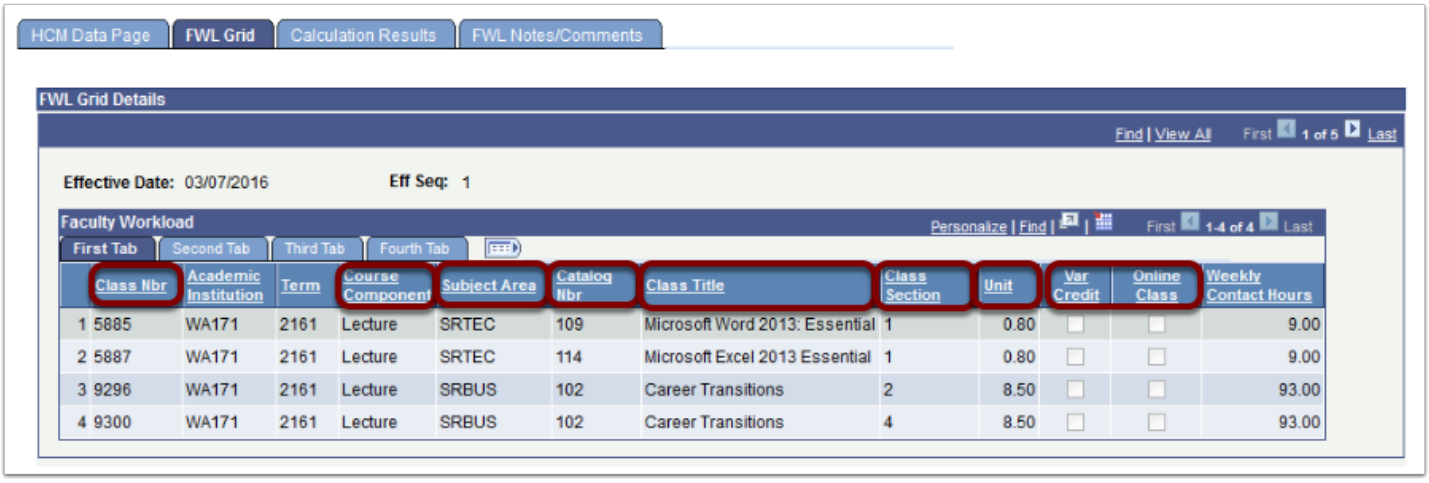
> **Note:** For information on how to calculate FWL refer to the Quick Reference Guide - FWL Calculation Processing (Batch).

The FWL Grid is made up of 4 tabs, which can be expanded to be viewed as a single tab, downloaded to Excel or personalized to rearrange which values appear on which tabs.

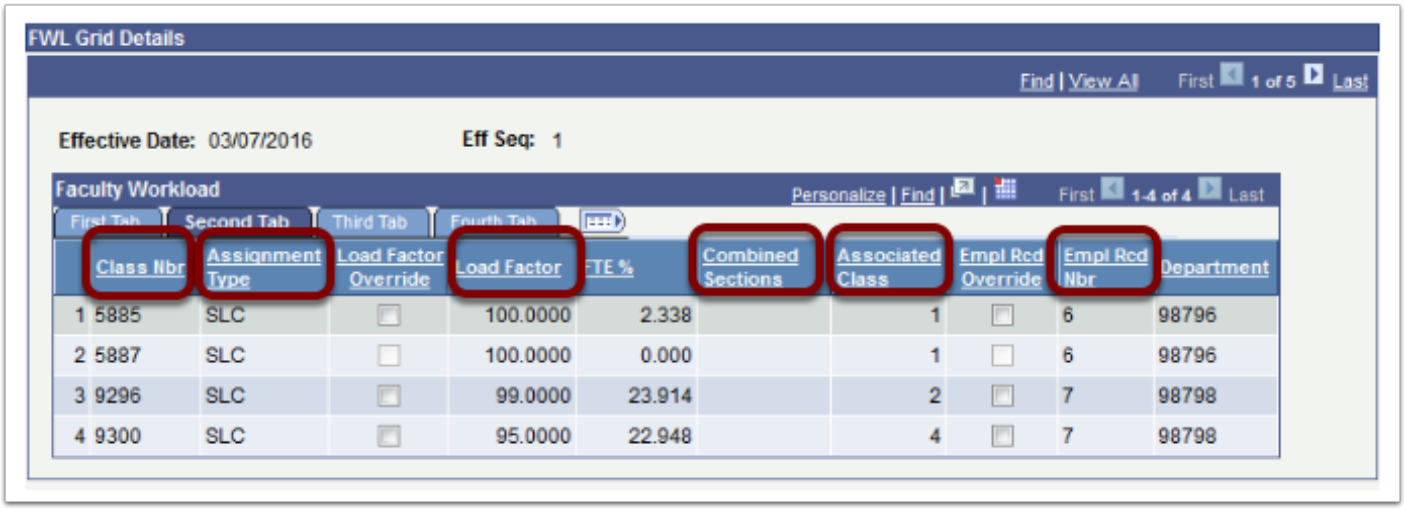


Data Sourced from Schedule of Class (SoC)

Various elements from the **Maintain Schedule of Class** page are loaded into the **FWL Grid** upon initial calculation, these include the **Class Nbr, Subject, Catalog Nbr, Component, Title, Units** and Instructor (Weekly) **Contact Hours**, as well as indicators of whether a class has **Variable Credits** or is designated as an **Online Class**.



In addition to the elements mentioned above, the selected **Assignment Type**, **Load Factor**, **Associated Class#**, **Combined Section#** and **Empl Rcd Nbr** are loaded to the **FWL Grid**, as well as Meeting Pattern information, which can be removed if desired using Personalization.



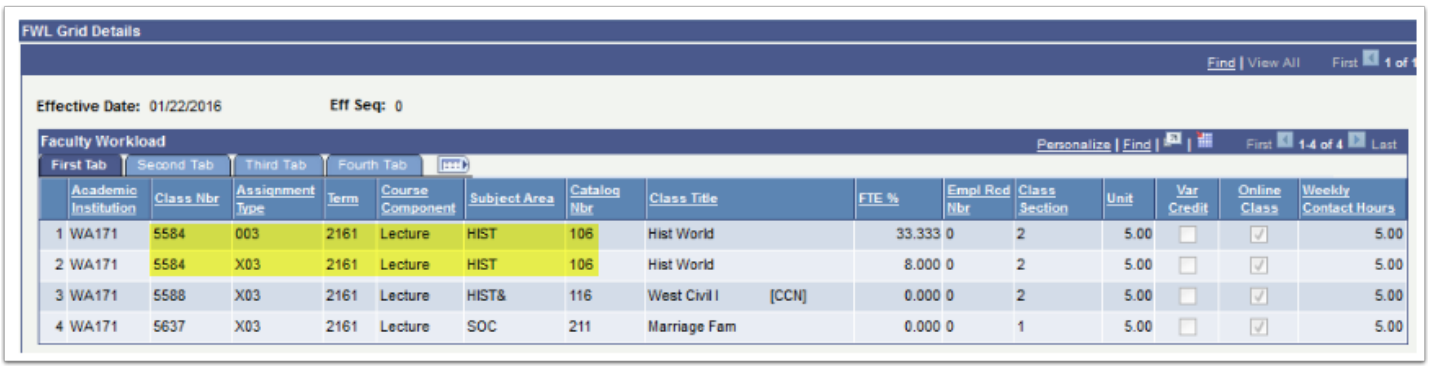
	Class Nbr	Assignment Type	Load Factor Override	Load Factor	FTE %	Combined Sections	Associated Class	Empl Rcd Override	Empl Rcd Nbr	Department
1	5885	SLC		100.0000	2.338		1		6	98796
2	5887	SLC		100.0000	0.000		1		6	98796
3	9296	SLC		99.0000	23.914		2		7	98798
4	9300	SLC		95.0000	22.948		4		7	98798

(SoC) Two Rows for Same Class on FWL Grid - Split Payment Methods

In general, for most colleges, each workload assignment added in **Schedule of Class** for an instructor will have a 1 to 1 match to the **Class Nbr** data loaded into the **FWL Grid**. Some colleges have a business practice where a single class is 'split' between regular load and moonlight or overload pay, or have classes that have more than one method of payment. If so, this will result in two rows appearing on the FWL Grid for the same class. For example:

- A class taught by Full Time Faculty (FAC) paid partially as a regular load (FT Salary) and partially as Moonlight (paid at the Part Time Faculty rate through FWL).
- A class taught by Full Time Faculty (FAC) paid partially as a regular load (FT Salary) and paid an additional, per student amount for each student above a maximum through FWL.

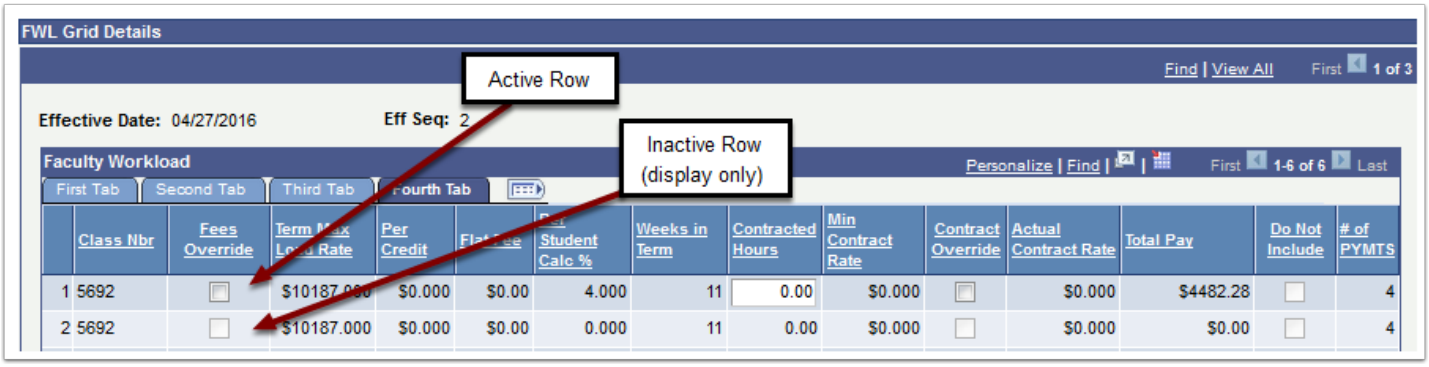
When the same instructor is being paid in two different ways for the same class, that instructor would be added to the **Schedule of Class** twice. When this occurs, there are two rows added to the **FWL Grid** upon calculation. In the example below, Class Nbr 5584 has 'active' two rows on the FWL Grid, each with a *unique* **Assignment Type**.



	Academic Institution	Class Nbr	Assignment Type	Term	Course Component	Subject Area	Catalog Nbr	Class Title	FTE %	Empl Rcd Nbr	Class Section	Unit	Var Credit	Online Class	Weekly Contact Hours
1	WA171	5584	003	2161	Lecture	HIST	106	Hist World	33.333	0	2	5.00		✓	5.00
2	WA171	5584	X03	2161	Lecture	HIST	106	Hist World	8.000	0	2	5.00		✓	5.00
3	WA171	5588	X03	2161	Lecture	HIST&	116	West Civil I [CCN]	0.000	0	2	5.00		✓	5.00
4	WA171	5637	X03	2161	Lecture	SOC	211	Marriage Fam	0.000	0	1	5.00		✓	5.00

(SoC) Two Rows for Same Class on FWL Grid - Display Only Row

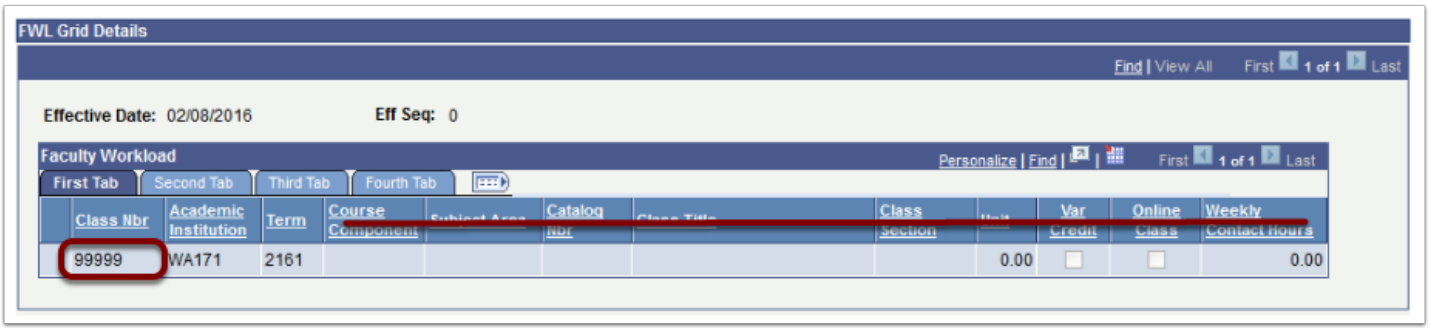
Two rows for the same Class Nbr may exist on the FWL Grid when a class is initially paid using one payment method, but the payment method (Assignment Type) is changed after at least 1 payment was sent to payroll. Since payment was sent to payroll, the underlying history must remain in case of audit. The data associated to that class will remain on the FWL Grid under the old Assignment Type, but as 'display only.' This is true even though the original payments were set to negative and the pay associated is recovered from the instructor.



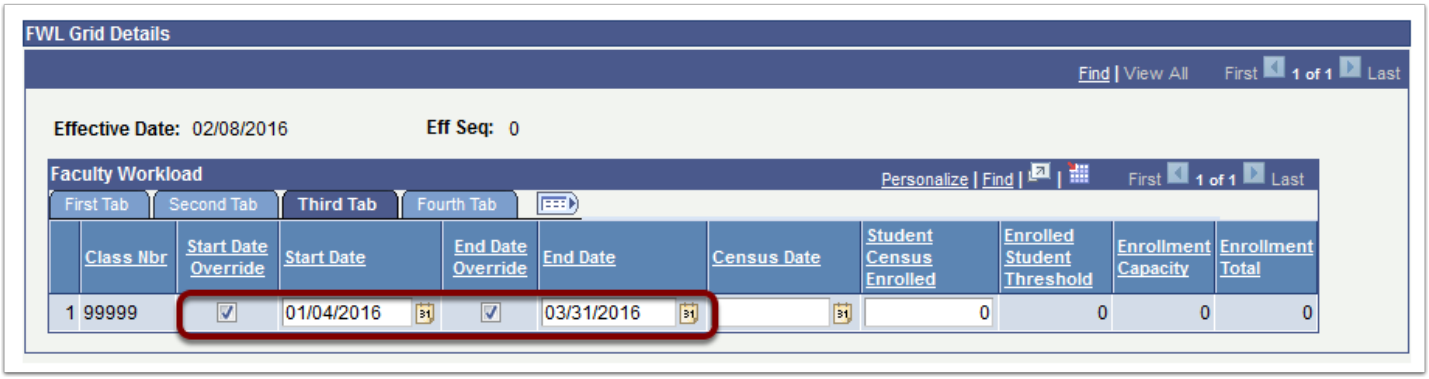
> **Note:** If the instructor was deleted from the class or the class was canceled after payment was made, then only 1 display only line will appear as a record of the payment details.

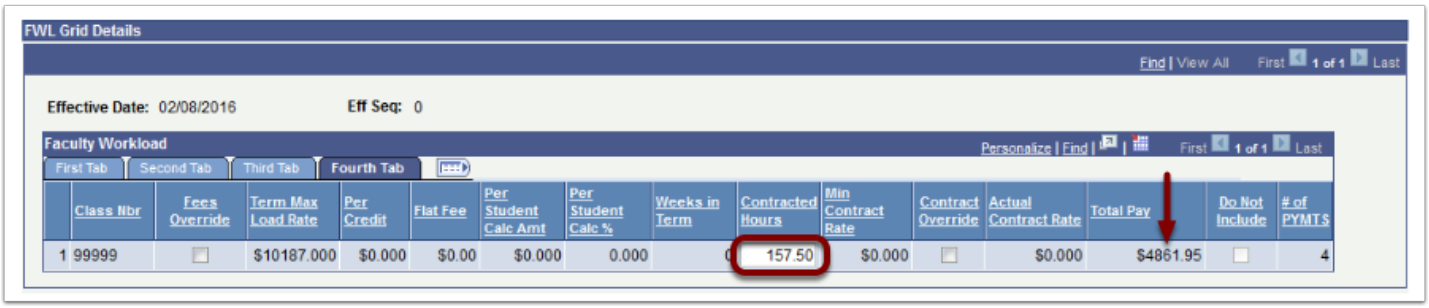
Data Sourced from Instructor Term Workload

The **FWL Grid**, when loaded with data from the **Instructor Term Workload**, will display a 5 digit class number, starting at 99999 and incrementing down (99998, 99997, 99996) for each subsequent non-instructional assignment. Unlike with data sourced from **Schedule of Class**, no Subject, Catalog Number, Component or Unit information is provided.



Non-Instructional assignments don't automatically calculate. They require manual entry of Start/End Date and Hours in the FWL Grid and a recalculation in order to generate Total Pay. See the section "Manually Add Contracted Hours" below for more information.





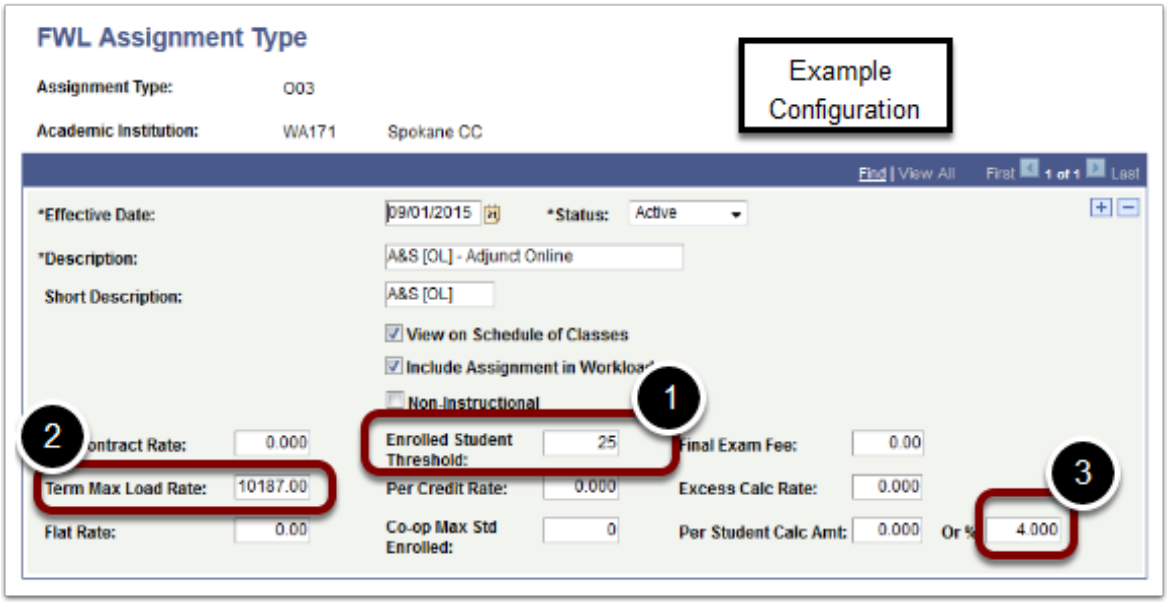
> **Note:** For information on how to process Non-Instructional (Special Assignment) Contract(s) refer to the Quick Reference Guide - Processing Non-Instructional Faculty Workload.

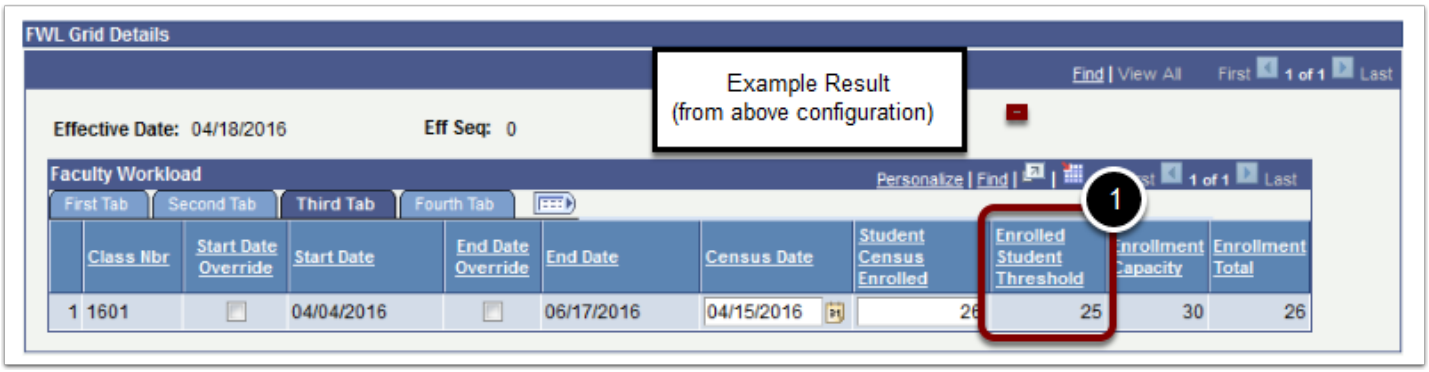
Data Sourced from Assignment Type Configuration

Some of the values on the **FWL Grid** are loaded from the **FWL Assignment Type** configuration page when the **FWL Calculation Process** is run. Which values are populated vary by the configuration decisions made by colleges to enforce their respective Collective Bargaining

Agreements (CBA). Using the **Fees Override** check box allows the user to edit some of the values on the FWL Grid. When recalculated the system does not refresh from the **FWL Assignment Type** page, rather using the manually entered values - so long as those values are configured in the pay calculation formula.

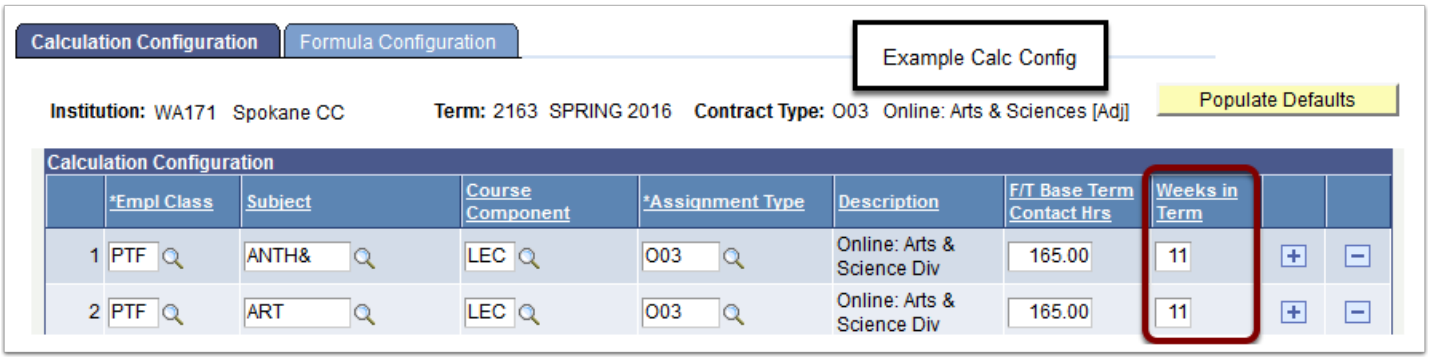
> **Warning:** If a pay rate change is implemented by adding a new **Effective Dated** row on the **FWL Assignment Type** page, those new values will not be pick up in a recalculation process if the **Fees Override** check box is checked. Manual intervention would be required.





Data Sourced from FWL Calculation Configuration (Formula)

Yet other values on the **FWL Grid** are loaded from the **FWL Calculation Configuration** page. If the values from the **FWL Assignment Type** configuration have been 'hard coded' into the **FWL Calculation Configuration**, those values will 'override' any value changes made on the **FWL Assignment Type** page.



Updating the FWL Grid

In this workspace staff can:

- Add Census Day Student Enrollment Counts
- Override the Start/End Date of a class or non-instructional work assignment, possibly impacting the term of the contract.
- Override Employ Record Numbers
- Override Load Factor
- Override Pay Elements
- Override Total Pay Using Flat Fee Field
- Manually add values that are not sourced from pages within the system:
  - Contracted Hours for non-instructional assignments.
  - Enrolled Student counts for an individual class census date.

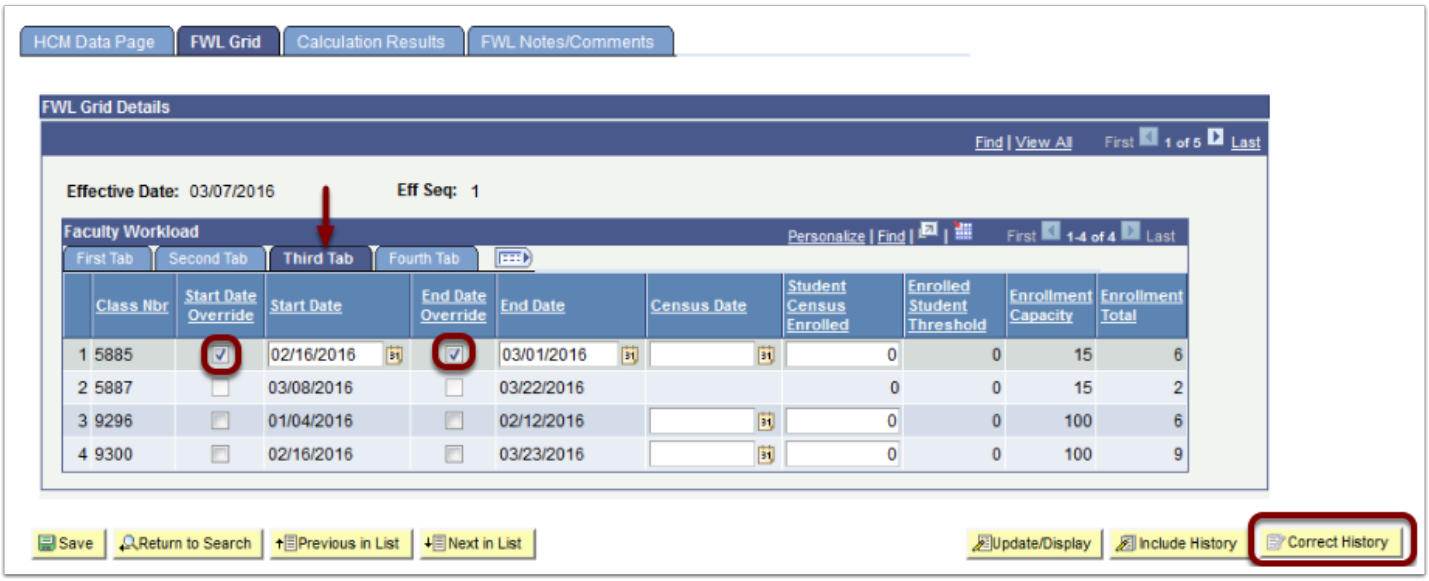
If changes are made to the FWL Grid, those changes must be **SAVED** to the grid and a "Recalculation" of the contract run in order to pick up the new values and incorporate them into the pay formula.

The system stores a snapshot of what the FWL Grid looked like with each calculation to preserve the data condition relative to each pay calculation. If an instructor was paid one way for a class, and that pay was partially sent to payroll and later changed, a record is kept in the FWL Grid of the original payment information.

> **Note:** For information on how to run the FWL Calculation Process to load the FWL Grid refer to the Quick Reference Guide - FWL Calculation Process (Batch).

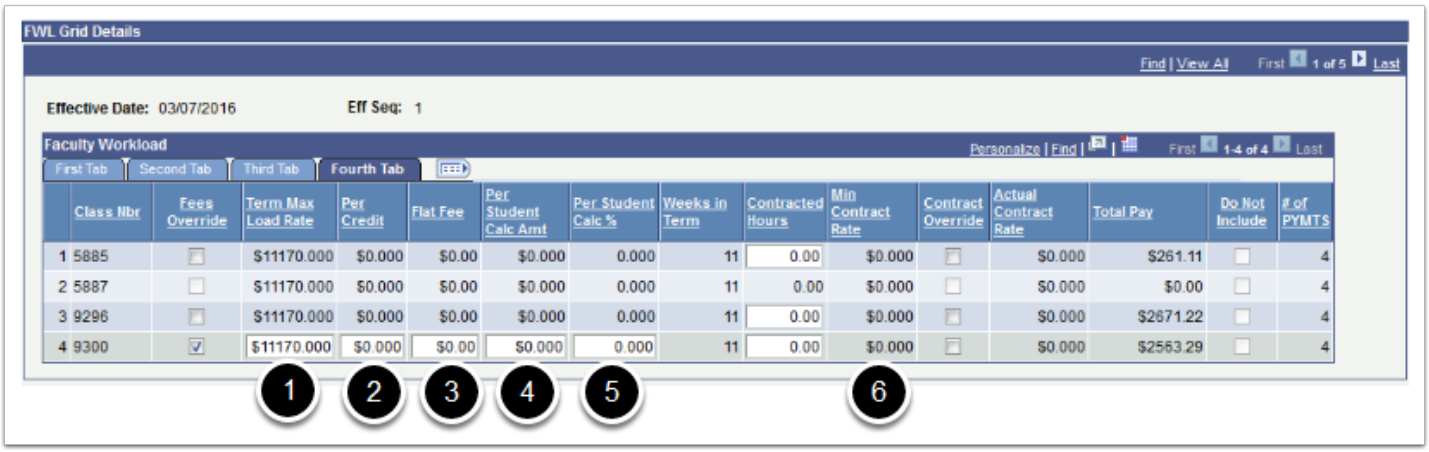
Override the Start/End Date on the FWL Grid

1. The Start/End Date is found on the Third tab (if the FWL Grid has not been personalized).
2. Click Correct History to allow editing on the FWL Grid.
3. To edit the start or end date, click the Start Date Override or End Date Override check box to open the field for editing. The leaving the override check box checked will prevent this field from being overridden from Schedule of Class again.
4. Enter the new Start Date or End Date or use the calendar lookup to select a date.
5. Click Save.



Override Pay Elements on the FWL Grid

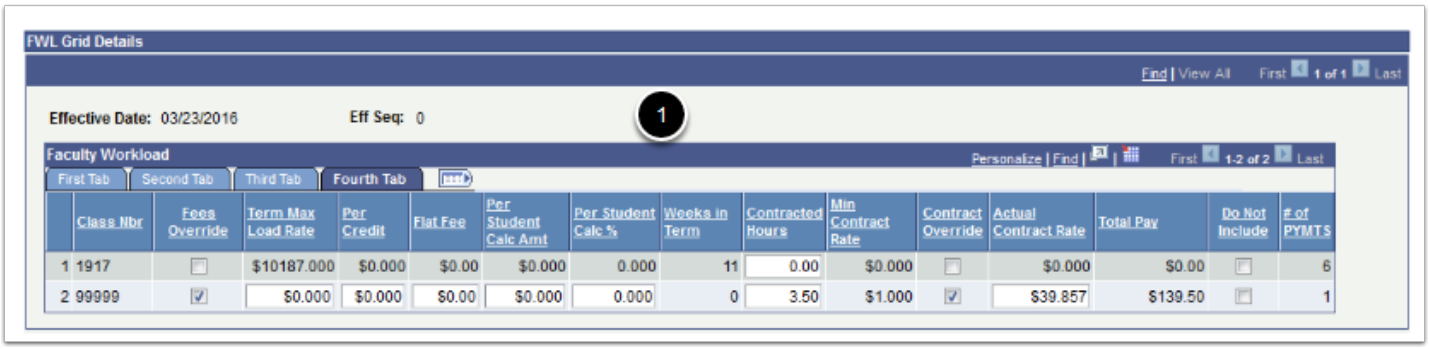
Overriding information related to Fees on the FWL Grid allows the user to deviate from the values on the Assignment Type configuration page on a 'one-off' basis. The elements of pay tagged below are sourced from Assignment Type configuration and are opened for editing when the Fees Override check box is checked. When using Fees Override, the system will no longer refresh from the FWL Assignment Type configuration page. Only those pay elements that are configured in the FWL Calculation Formula will have any influence on pay upon recalculation.



	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc Amt	Per Student Calc %	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	5885	☐	$11170.000	$0.000	$0.00	$0.000	0.000	11	0.00	$0.000	☐	$0.000	$261.11	☐	4
2	5887	☐	$11170.000	$0.000	$0.00	$0.000	0.000	11	0.00	$0.000	☐	$0.000	$0.00	☐	4
3	9296	☐	$11170.000	$0.000	$0.00	$0.000	0.000	11	0.00	$0.000	☐	$0.000	$2671.22	☐	4
4	9300	☑	$11170.000	$0.000	$0.00	$0.000	0.000	11	0.00	$0.000	☐	$0.000	$2563.29	☐	4

Override Hourly Pay Rates

Some pay formulas use an hourly pay rate that is multiplied either by the **Term Contact Hours** for a class, or a manually entered number of hours, stored on the **FWL Grid** as **Contracted Hours**. In those pay formulas, the system will store a default **Minimum Contract Rate** in the **Assignment Type** configuration. If a college requests their pay formula configuration to support *increasing* that pay rate on a 'one-off' basis, the **Fees Override** and **Contract Override** check boxes can be checked, opening the **Actual Contract Rate** field for editing.



	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc Amt	Per Student Calc %	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	1917	☐	$10187.000	$0.000	$0.00	$0.000	0.000	11	0.00	$0.000	☐	$0.000	$0.00	☐	6
2	99999	☑	$0.000	$0.000	$0.00	$0.000	0.000	0	3.50	$1.000	☑	$39.857	$139.50	☐	1

Override Pay Using Flat Fee Field

Use of the **Flat Fee** field is activated only by clicking the **Fees Override** check box. When used to hand enter a total pay value the payment amounts for other Fee/Rate fields are set to zero ($0) and the value of the total pay is entered in the **Flat Fee** field. The user must click Save and Recalc to modify pay.

FWL Grid Details

Find | View All First 1 of 11

Effective Date: 04/18/2016 Eff Seq: 3

Faculty Workload

Personalize | Find | First 1-5 of 5 Last

First Tab | Second Tab | Third Tab | Fourth Tab

	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc Amt	Per Student Calc %	Final Exam Fee	Excess Calc Rate	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	1259	☑	0.000	$0.000	$989.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$1018.70	☐	4

Colleges that have requested configuration allowing the ability to override the pay calculated by the system to utilize a simple 'direct entry' of the total pay for term can do so as described above. This is used solely as a means to expedite the payment process if an issue has arisen in calculating pay through the system. This is a stop-gap measure only, as the **FTE%** and **Term Contact Hours** are still calculated through the system, but can allow payments to proceed if working through an issue with a contract. Once resolution has occurred, the payment would be corrected to generate from the system calculation. When used for this purposes, the **Fees Override** check box is checked, the pay elements are all set to zero, the flat fee is entered and the pay is recalculated. The result (shown below) is that the amount entered into the **Flat Fees** field becomes the **Total Pay**.

FWL Grid Details

Find | View All First 1 of 12

Effective Date: 08/15/2016 Eff Seq: 0

Faculty Workload

Personalize | Find | First 1-5 of 5 Last

First Tab | Second Tab | Third Tab | Fourth Tab

	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc Amt	Per Student Calc %	Final Exam Fee	Excess Calc Rate	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	1259	☑	$0.000	$0.000	$989.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$989.00	☐	4

The Flat Fee field can also be configured to add conditional pay. In those cases, college configuration uses the **Flat Fee** field as a to increase pay beyond to the regular pay calculated via the system. For example, if the college pays by multiplying a dollar amount per **Unit**, but pays for an additional **Unit** in Lecture/Lab combination classes, the payment amount for the additional **Unit** is stored in the **Flat Fee** configuration for the **Assignment Type**. This value is activated only when the **Fees Override** check box is checked and recalculation will add that amount to the total pay for that class.

FWL Grid Details

Find | View All First 1 of 10 Last

Effective Date: 03/15/2016 Eff Seq: 1

Faculty Workload

Personalize | Find | First 1-6 of 6 Last

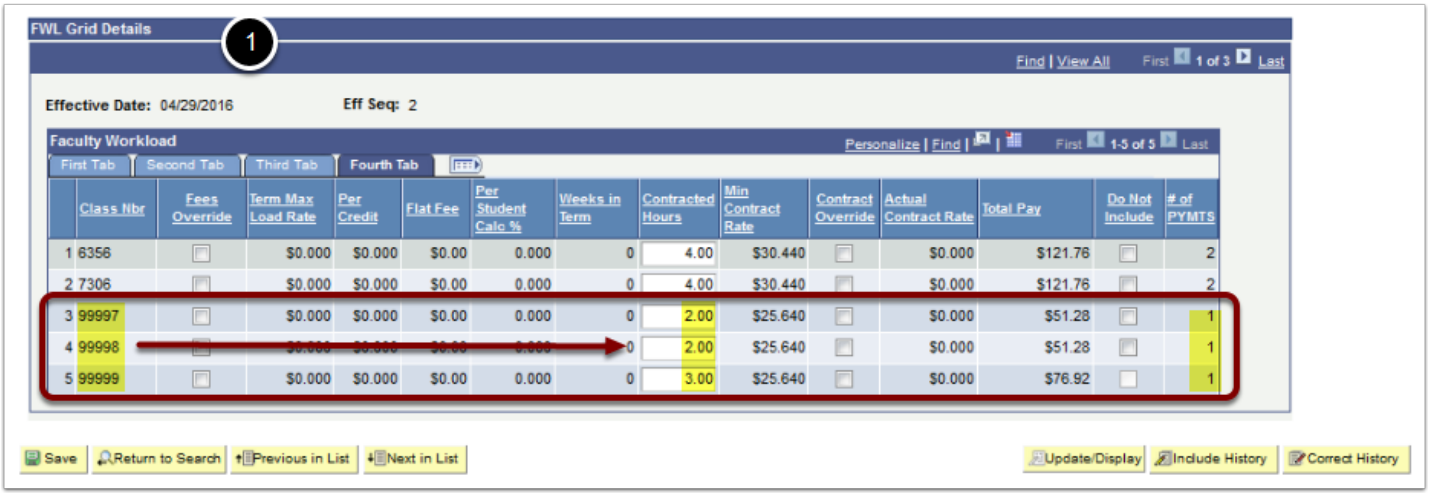
First Tab | Second Tab | Third Tab | Fourth Tab

	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc Amt	Per Student Calc %	Final Exam Fee	Excess Calc Rate	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	3632	☑	$0.000	$775.60	$775.60	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$3878.00	☐	6
2	3633	☑	$0.000	$0.000	$387.80	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$387.80	☐	6
3	3686	☑	$0.000	$775.60	$775.60	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$3878.00	☐	6
4	3687	☑	$0.000	$0.000	$387.80	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$387.80	☐	6
5	3688	☑	$0.000	$0.000	$387.80	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000	☐	$0.000	$387.80	☐	6
6	99999	☑	$0.000	$0.000	$35.67	$0.000	0.000	$0.00	$0.000	0	11.00	$0.000	☐	$0.000	$392.37	☐	6

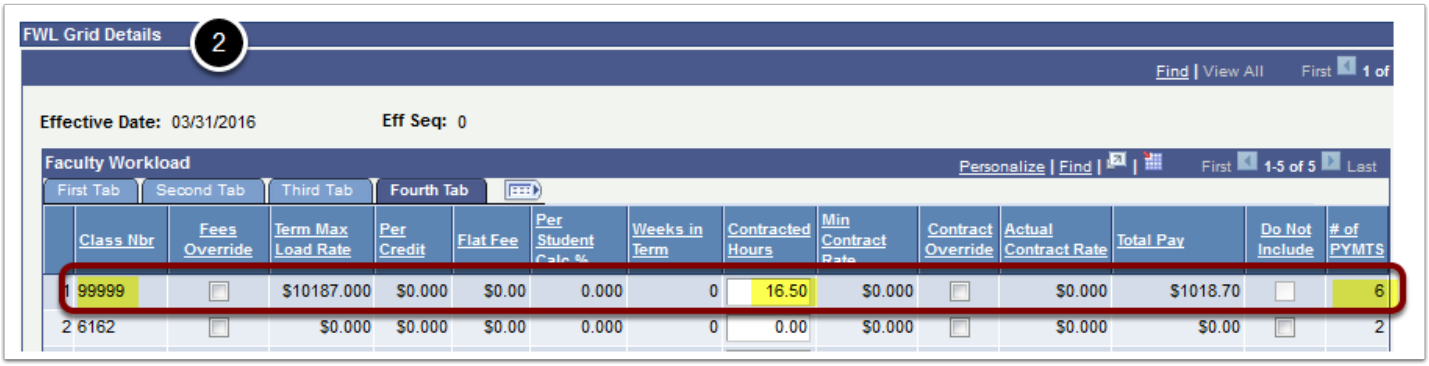
Manually Add Contracted Hours for Non-Instructional Assignments

When Non-Instructional assignments are loaded from the Instructor Term Workload page to the FWL Grid they are missing 3 key data elements which must be added before the contract is "Recalculated' in order to generate Pay Line data, Start Date/End Date and Contracted Hours. The Contracted Hours field is designed to allow for manual entry of hours that will be distributed across the term of the contract (start/end date range) on the Pay Line. Those hours can be multiplied by an hourly rate or used to calculate an FTE% value that can be multiplied against a maximum amount of pay per term (Term Max Load Rate) for 100% FTE, depending on how the college defines the method of payment. Each non-instructional assignment will have a different Class Nbr (99999, 99998, 99997), but does not display any specific differentiation beyond the Assignment Type.

- On the **Fourth Tab** on the **FWL Grid** Page, enter the **Contracted** Hours. This is the total number of hours associated to this contract for the term.
- Click **Save** to commit the changes to the **FWL Grid** page.

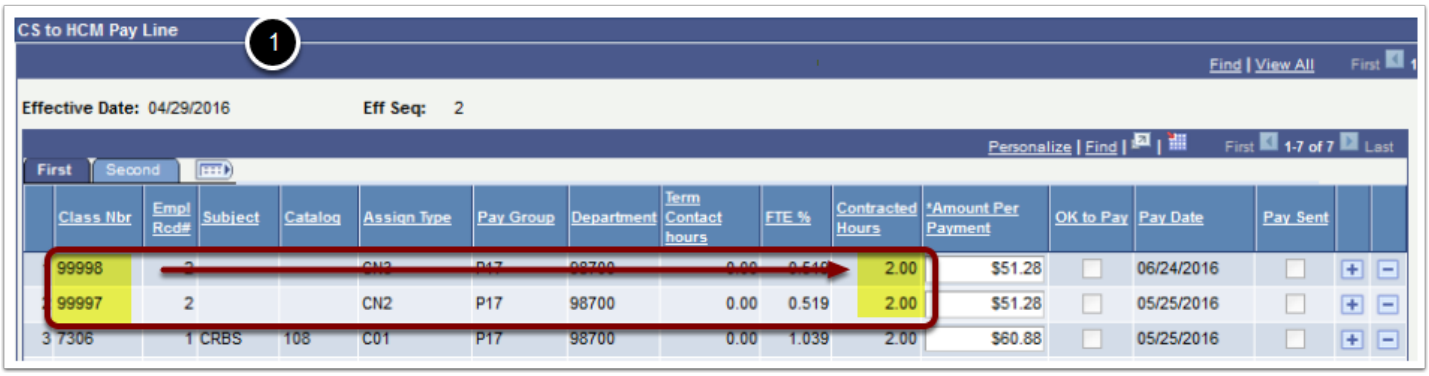


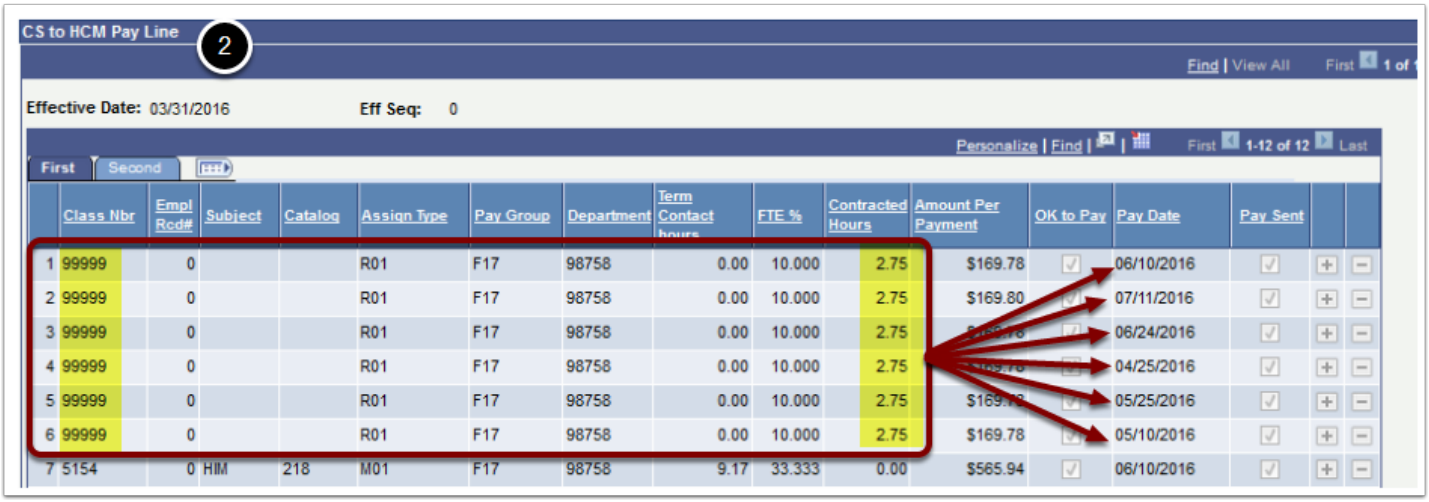
	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc %	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	6356		$0.000	$0.000	$0.00	0.000	0	4.00	$30.440		$0.000	$121.76		2
2	7306		$0.000	$0.000	$0.00	0.000	0	4.00	$30.440		$0.000	$121.76		2
3	99997		$0.000	$0.000	$0.00	0.000	0	2.00	$25.640		$0.000	$51.28		1
4	99998		$0.000	$0.000	$0.00	0.000	0	2.00	$25.640		$0.000	$51.28		1
5	99999		$0.000	$0.000	$0.00	0.000	0	3.00	$25.640		$0.000	$76.92		1



	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc %	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	99999		$10187.000	$0.000	$0.00	0.000	0	16.50	$0.000		$0.000	$1018.70		6
2	6162		$0.000	$0.000	$0.00	0.000	0	0.00	$0.000		$0.000	$0.00		2

The Contracted Hours when distributed across the term of the contract (start/end date range) on the Pay Line will appear as a lump sum of hours if there is only one pay date (1) or have the hours divided by the # of PYMTS value (2) as defined by the earliest Start Date and latest End Date of all assignments in the contract for Labor and Industries reporting.



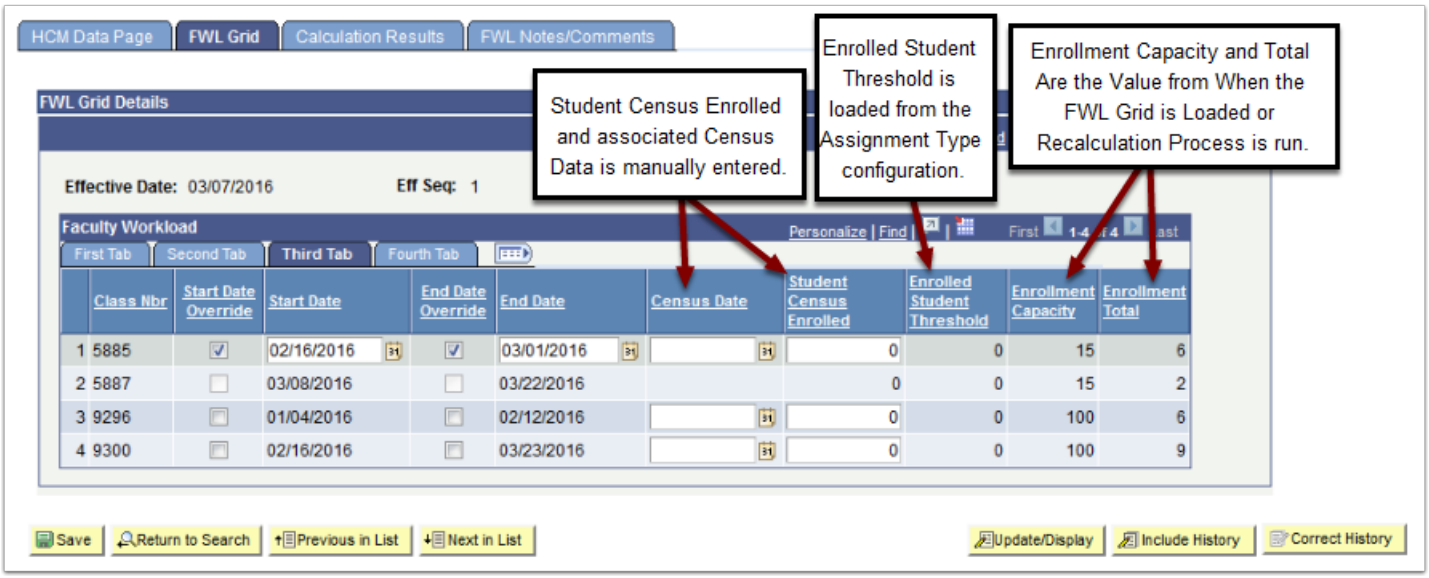


Manually Add Census Day Student Enrollment Counts

When the FWL Grid is initially loaded with data from the Schedule of Class, the Enrollment Capacity and the current Enrollment Total is loaded. This information remains static until a recalculation occurs.

If a pay formula is reliant on a pre-defined enrollment threshold, this value is configured on the Assignment Type configuration page, and loaded to the FWL Grid on initial calculation or subsequent recalculations

Since not all classes in a term have the same meeting pattern or begin date, classes can have differing Census Dates. Pay formulas that rely on a specific enrollment count on the census date will need to have the student enrolled count manually entered into the FWL Grid and a recalculation processed in order to calculate pay based on that value. Any changes made on the FWL Grid require a SAVE and recalculation in order to be picked up and processes in the pay formula.



	Class Nbr	Start Date Override	Start Date	End Date Override	End Date	Census Date	Student Census Enrolled	Enrolled Student Threshold	Enrollment Capacity	Enrollment Total
1	5885	☑	02/16/2016	☑	03/01/2016		0	0	15	6
2	5887	☐	03/08/2016	☐	03/22/2016		0	0	15	2
3	9296	☐	01/04/2016	☐	02/12/2016		0	0	100	6
4	9300	☐	02/16/2016	☐	03/23/2016		0	0	100	9

***Note:** The term "Batch" as it relates to the FWL Calculation Process (Batch) refers to executing the calculation process using the scheduling process, rather than executing the process "Online" or on the page itself. This method allows the process to execute in the back ground and generates a report or log file that can be viewed later. This method can be run for an individual instructor, or a 'batch' of instructors if multiple Empl ID numbers are entered when the process is scheduled.

Understanding FWL Job Data

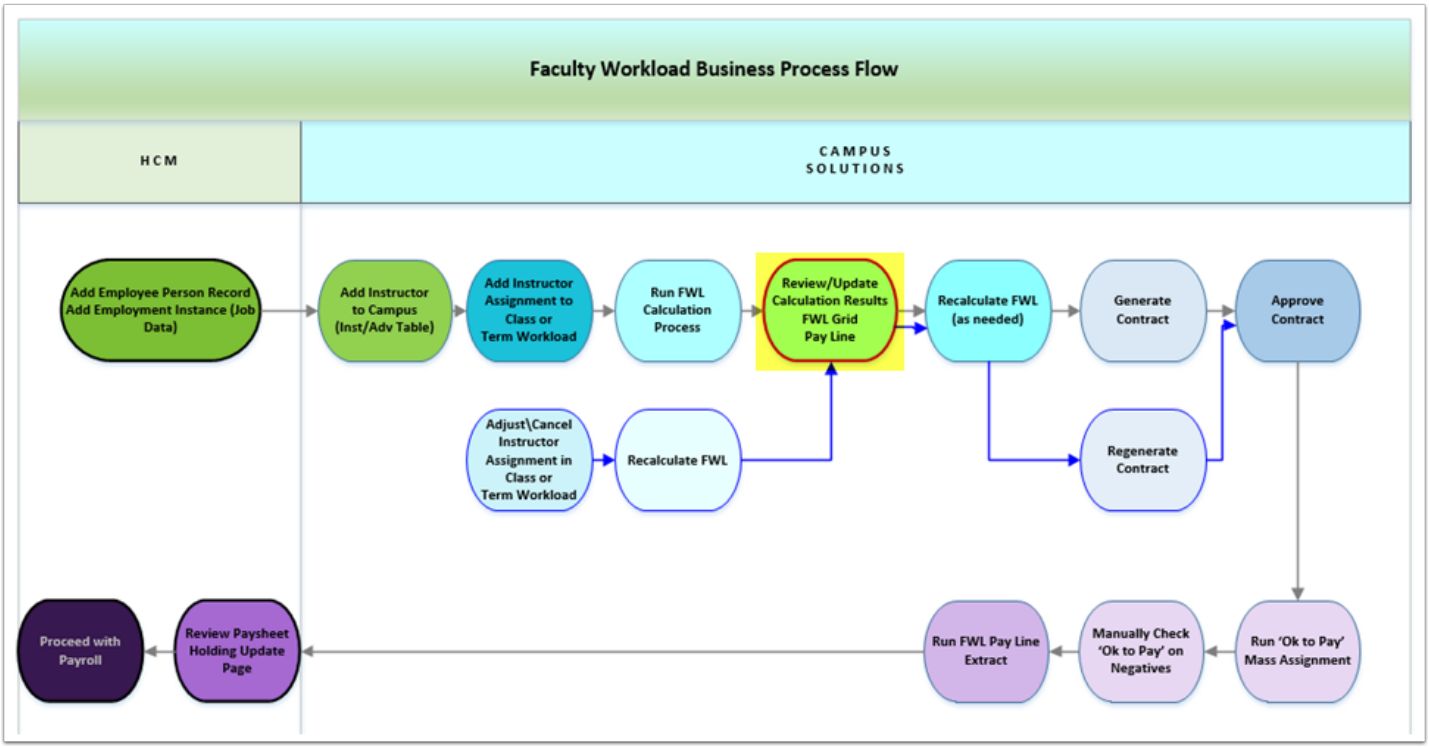
Purpose: Use this document as a reference for understanding how Job Data in Human Capital Management (HCM) is viewed and used in Faculty Workload.

Audience: HR\Payroll Staff

Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Overview of Job Data (HCM Data - Position/Job Summary)

Job Data in FWL appears in the **Position/Job Summary** section of the **HCM Data** page, which is part of the **Maintain Faculty Workload** component. The **Maintain Faculty Workload** component is the heart of the Faculty Workload process in that it serves as a "workspace" to store pertinent data. This page, sits half way through the business flow of processing Faculty pay, between adding the instructor assignments in class and generating an online contract to send pay to payroll.



The **HCM Position Job Summary** section allows staff to view summary information on active job records in **HCM** for Part-Time (*PTF*) and Full-Time Faculty (*FAC*), as well as providing '*view only*' access into the actual **Job Data** component in **HCM**, by following the '**View Job Data**' link.

HCM Data Page | FWL Grid | Calculation Results | FWL Notes/Comments

Instructions

Header Data

Empl ID: 1010 | Institution: WA | Term: 2167 FALL 2016

First Name: Steven | Last Name: | Phone:

Email ID: .EDU

HCM Data Information

HCM Position Job Summary — Personalize | Find | First 1-5 of 5 Last

	Position Number	Empl Class	Empl Rcd #	Empl Rcd # Descr	HR Status	Payroll Status	Job Code	Company	Business Unit	Department	Salary Grade	Step	View Job Data
1		FAC	3	Secondary	Active	Active	960000	170	HR171	98784	FTF	11	View Job Data
2		FAC	4	Secondary	Active	Active	950000	170	HR171	98784	XXX	0	View Job Data
3		PTF	1	Secondary	Active	Active	44SA00	170	HR171	98784		0	View Job Data
4		PTF	5	Secondary	Active	Active	440000	170	HR171	98784		0	View Job Data
5	00001516	FAC	0	Primary	Active	Active	220124	170	HR171	98784	FTF	11	View Job Data

> **Warning:** While a job record is visible in FWL if the **HR Status** is '*Active*', if the **Payroll Status** is not also set to '*Active*', pay cannot be sent to payroll for that job.

Clicking this link opens a new page in HCM to 'display' the job information - only if the user has the role to view this information.

View Job Data

Favorites | Main Menu | Workforce Administration | Job Information | Job Data

cteLink — All | Search | Advanced Search

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | CTC Job Data | CTC Earnings Distribution

Steven — Employee | Empl ID 1010 | Empl Record 0

Work Location — Find | First 1 of 5 Last | Go To Row

*Effective Date 09/01/2015 | Effective Sequence 4 | HR Status Active | Payroll Status Active | *Action Pay Rate Change | Reason Step Progression | *Job Indicator Primary Job | Current

Position Number 00001516 — ELECTRONICS ENG TECHNICIAN | Use Position Data | Position Entry Date 01/01/2015 | Position Management Record | *Regulatory Region | Company | *Business Unit | *Department | Department Entry Date | *Location | Establishment ID | Date Created 12/15/2015

Last Start Date 01/01/2015 | Expected Job End Date

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | CTC Job Data | CTC Earnings Distribution

On the HCM **Job Data** record, the **CTC Earnings Distribution** page will store all of the 'budget' codes that payroll can be expensed against for that job. The HCM system stores the **Earnings Code** and **Combination Code** (referred to as *Combo Code* or *Account Code*). The **CTC Earnings**

Distribution page will store all the available **Earnings Codes** that an employee could be paid with, but not all of these codes are used in FWL. Typically only MLC (Moonlight/Overtime) and PTF (Part-Time Faculty - Adjunct) are applicable in FWL, however at this time any of the **Earnings Codes** on the job record are visible on the **FWL Pay Line**.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | CTC Job Data | CTC Earnings Distribution

Steven
Employee

Empl ID 10100
Empl Record 0

Job Information — Find — First 1 of 7 Last — Go To Row

Effective Date 09/01/2015
Effective Sequence 4
HR Status Active
Payroll Status Active
Action Pay Rate Change
Reason Step Progression
Job Indicator Primary Job
Current

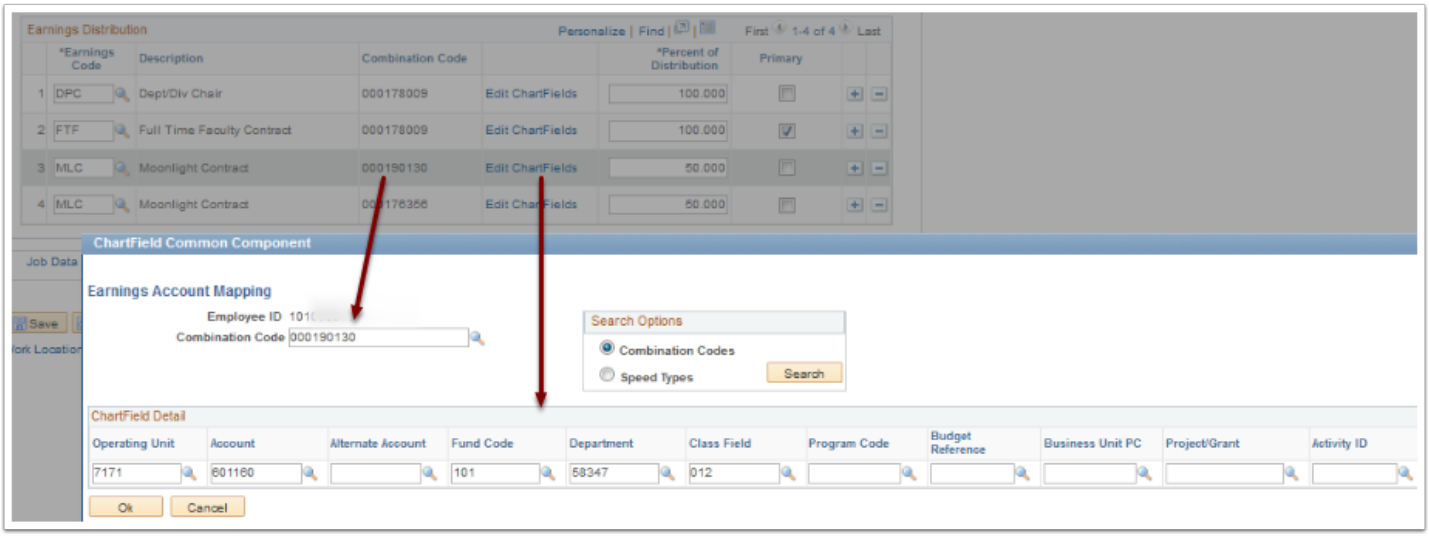
Earnings Distribution — Personalize | Find | First 1-4 of 4 Last

	*Earnings Code	Description	Combination Code		*Percent of Distribution	Primary
1	DPC	Dept/Div Chair	000178009	Edit ChartFields	100.000	☐
2	FTF	Full Time Faculty Contract	000178009	Edit ChartFields	100.000	☑
3	MLC	Moonlight Contract	000190130	Edit ChartFields	50.000	☐
4	MLC	Moonlight Contract	000176356	Edit ChartFields	50.000	☐

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

On the **CTC Earnings Distribution** page, the **Earnings Codes** are stored with their associated **Combination Code**(s). If the job is paid from multiple budgets, then the **Earnings Code** will be added more than once and each budget (Combo Code) will be added on a separate line. The **Percent of Distribution** will be split equally to total 100%. Faculty Workload does not use the distribution percentage from this page, as the actual payments come through the **Pay Sheet Upload** process and are not put through a distribution process. The page itself though does require that each **Earnings Code** total 100% distribution. Typically the first Earnings Code entered on the CTC Earnings Distribution page is picked up and posted to the **FWL Pay Line** upon calculation, however the value can be changed on the **Pay Line**.

The Combo Code in HCM is a representation of the full finance chartfield string, represented by a 12 digit number. The Combo Code is seen in FWL, not the chartfields behind it, so staff will want to become familiar with the Combo Code that represents budgets for their particular department. A Query can be run in Campus Solutions to view the chartfield descriptions behind the code, or HR staff can use the **Edit Chartfields** link to view the accounting string behind the code.



Alert: The **HCM Position Job Summary** page operates in 'real time' meaning if a job is terminated, it will immediately disappear from the FWL **HCM Data page**. Make sure ALL payroll processing for FWL is complete for the instructor BEFORE terminating the job in HCM.

VIDEO 1: HCM Job Data & Faculty Workload

Please follow the link below to view part 1 of a 9 part video series on Faculty Workload.

FWL Overview - HCM Job Data

This video is geared towards HR Staff and covers the data elements in HCM - Job Data that impact Faculty Workload.

> The next video in this series FWL Overview - Add a New Instructor to Campus Solutions is available by following this link.

VIDEO 2: Add A New Instructor to Campus Solutions

Please follow the link below to view part 2 of a 9 part video series on Faculty Workload.

FWL Overview- Add A New Instructor to Campus Solutions

This video is geared towards Class Schedulers & HR\Payroll Staff and covers both adding the record to the Inst\Adv Table and what happens on the instructor's Security - User Profile when the record is added.

As other videos in this series become available you will find the QRG updated with a link to the next video in this series.

Faculty Workload Processing

Adding an Instructor to the Instructor/Adviser Table

Purpose: Use this document as a reference for how to add an instructor to the Instructor/Advisor table in ctcLink.

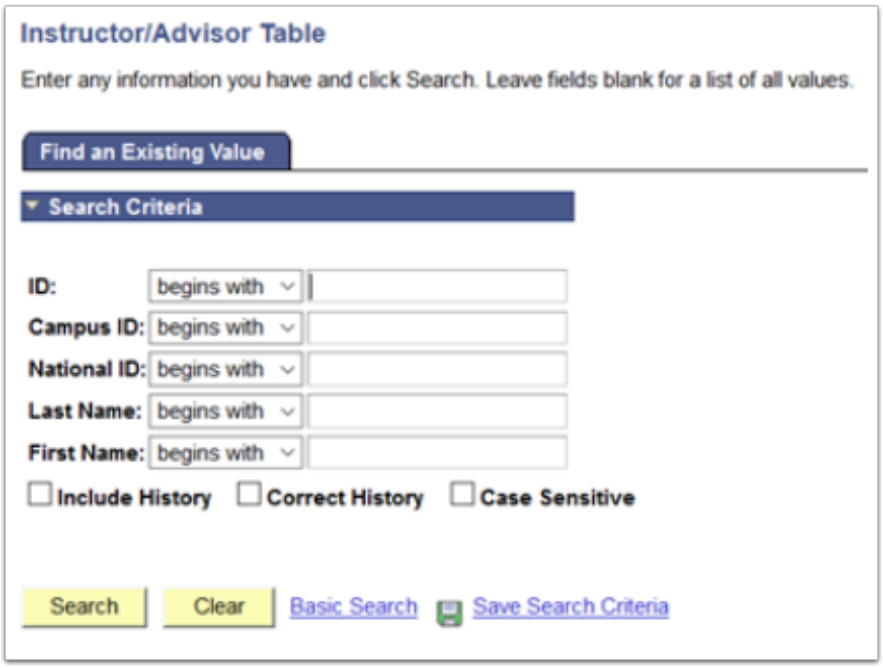
Audience: Class Scheduling Staff

Navigation: Main Menu → Curriculum Management → Instructor/Advisor Information → Instructor/Advisor Table

When a new instructor is hired, they will be entered into HCM and synched to Campus Solutions to create a person record in Campus Community. Once the record is available, follow these steps to make them a valid instructor for selection in the class schedule.

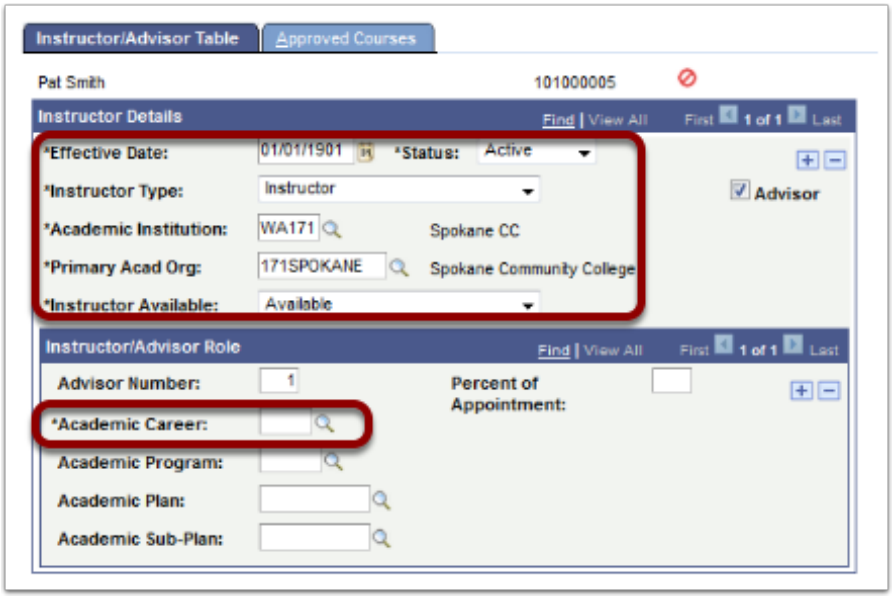
Note: An instructor working at more than one college must have an Instructor/Advisor Table entry for EACH Institution with a 01/01/1901 Effective Date.

1. Look up the Instructor by **ID** or **Last/First Name** then click **Search** or select from the list. The results returned will be records that exist in HCM. At a minimum, a new employee must have a person record stored in HCM which will be synchronized to Campus Solutions in a batch process executed nightly, or twice daily during peak processing times. Once the employee has been hired, an Employment Instance would then need to be added in HCM. An instructor cannot generate a contract or be paid until a job record exists in HCM.



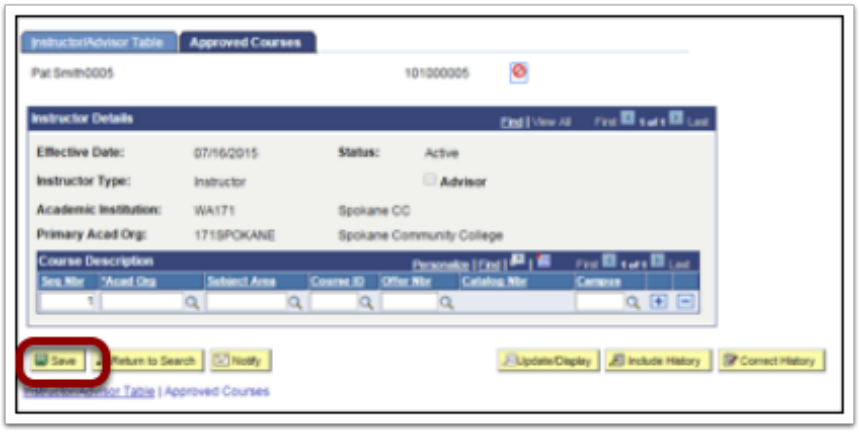
2. On the **Instructor/Advisor Table** tab in the **Instructor Details** section enter the following:
   1. **Effective Date:** Defaults to current date, set date to 01/01/1901.
   2. **Status:** Will default to **Active.**
   3. **Instructor Type**: Select from List. The values used are at the college discretion and have no bearing on pay.
   4. **Academic Institution**: Enter or look up.
   5. **Primary Academic Org**: Select from the list associated with the selected institution.
   6. **Instructor Available**: Select **Available**.
   7. Check the **Advisor** check box if they have advisor responsibilities.

3. The **Instructor/Advisor Role** section has no bearing on pay, to add values enter the following:
   1. **Career:** Enter or look up.
   2. Remaining fields are optional.



Failure to add the Instructor/Advisor Table entry with an 01/01/1901 Effective Date can cause calculation failures if date is inconsistent with terms being calculated. Always use the **01/01/1901** Effective Date.

4. The **Approved Courses** tab fields are optional and not recommended. Approved Courses limits the specific subjects or courses in which instructors can be assigned. If academic instructors at your college are offered contracts in Continuing Education or moonlight contracts for teaching outside their primary subject it is not recommended that this page be used.
5. Click the **Save** button.



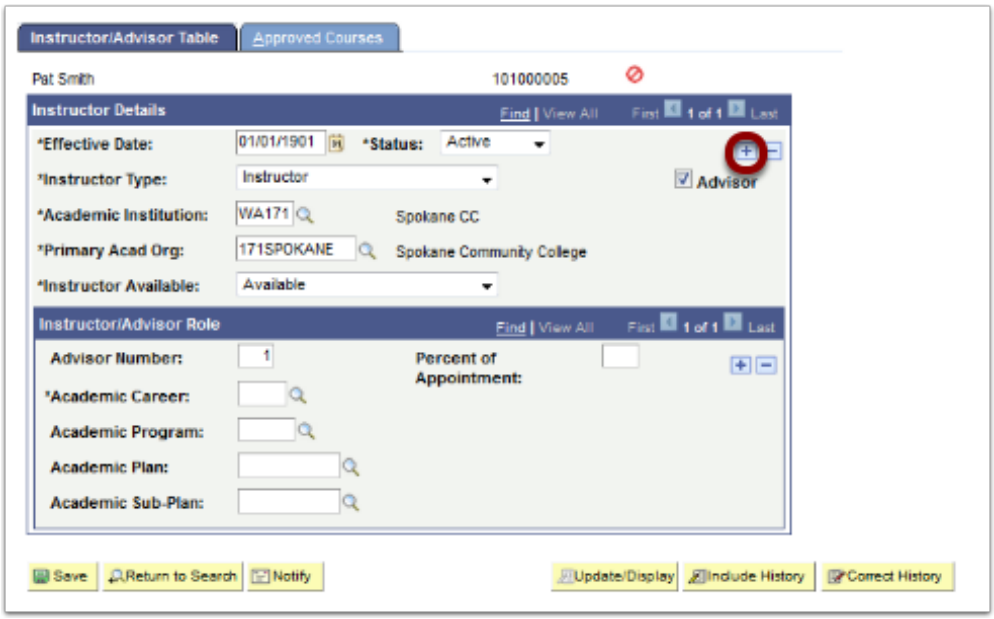
Security Access: The role allowing access to the Faculty Center is dynamically assigned once the instructor has been added to the Instructor/Advisor Table. The process that performs this assignment runs periodically. Instructors will NOT be granted access to the Faculty Center until this entry exists and the process executes.

College Security Managers cannot manually assign the CTC_INSTRUCTOR Role.

Adding a Second Instructor/Advisor Entry

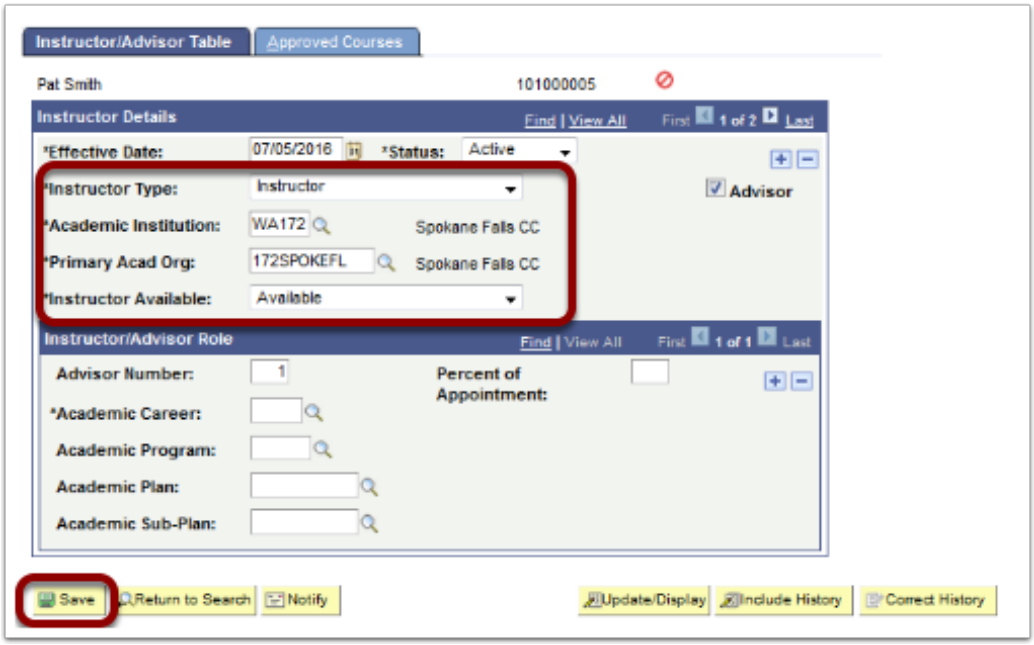
If an Instructor/Advisor Table entry already exists for another college, especially with multi-campus districts, a second entry may be required to support calculation of pay across multiple institutions.

1. Click the plus symbol **(+)** to add a second Effective Dated row.



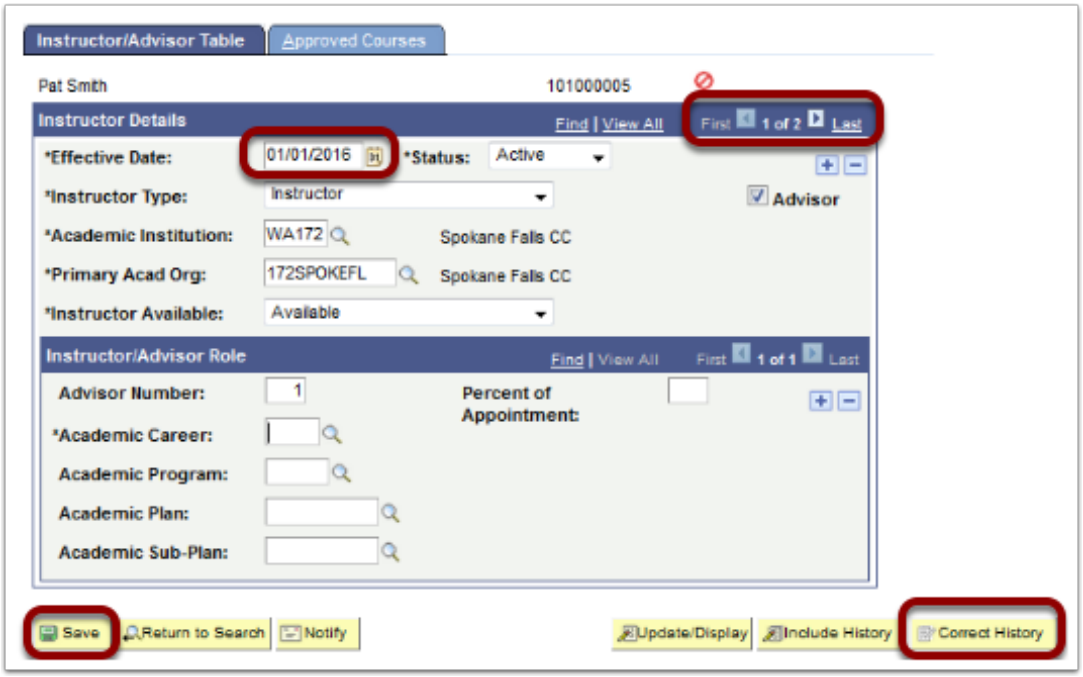
2. On the **Instructor/Advisor Table** tab in the **Instructor Details** section enter the following:
   1. **Effective Date:** Use the default (current date) value initially.
   2. **Status:** Will default to **Active.**
   3. **Instructor Type**: Select from List. The values used are at the college discretion and have no bearing on pay.
   4. **Academic Institution**: Enter or look up for the second institution.
   5. **Primary Academic Org**: Select from the list associated with the selected institution.
   6. **Instructor Available**: Select **Available**.

3. Click the **Save button.**



4. Click the **Correct History** button (*requires security access*).

5. Use the arrow icons in the **Instructor Details** ribbon to select the newly added record with the current Effective Date.
6. Edit the Effective Date to 01/01/1901.
7. Click the **Save** button.



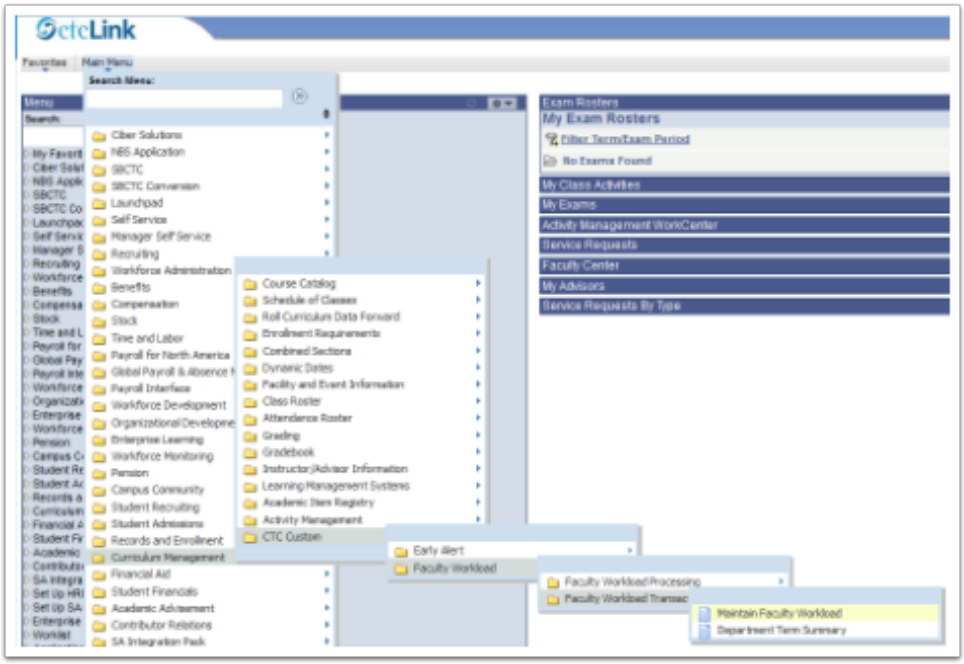
Creating Faculty Workload Favorites

Purpose: Use this document as a reference for how to create and manage your favorite FWL pages in ctcLink. Arranging the pages in the order of work will help to not miss a step in processing faculty pay. Link recommendations are included in this Quick Reference Guide.

Audience: Class Scheduling Staff, HR\Payroll Staff.

Creating Favorites

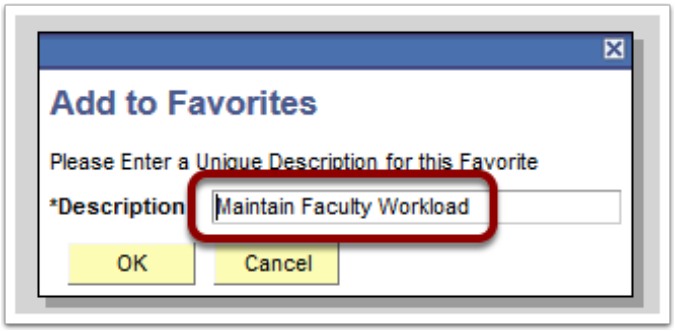
By establishing 'Favorites,' users of PeopleSoft can avoid memorizing lengthy navigations. By arranging the pages necessary to perform a task in the proper order and naming the page links in a way that makes sense to the user saves time and doesn't get lost in the many nested menus. Favorites are stored in the system and regardless of which browser or PC is used will be accessible to the user regardless of where they log into the system from. Using 'Favorites' largely elliminates the 'how did I get to that page last time' feeling of using a brand new system.



Navigation will vary depending on the page being added as a 'Favorite.' In this example, navigate to the same file path displayed above: **Curriculum Management** > **CTC Custom** > **Faculty Workload** > **Faculty Workload Transaction** > **Maintain Faculty Workload**

1. In the upper, right hand corner locate and click the **Add to Favorites** link.

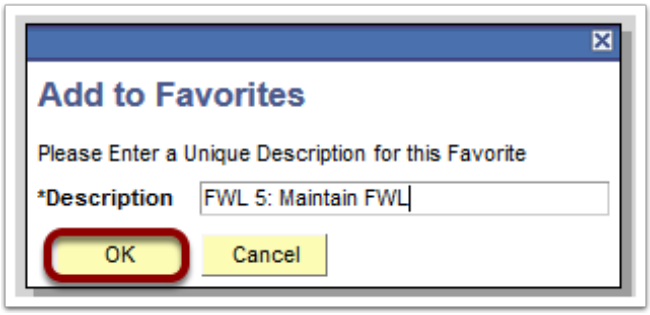
2. When the **Add to Favorites** pop-up window appears the page name will be automatically displayed in the **Description** field. Edit this description.



Recommendation - 'FWL 5: Maintain FWL' for Class Scheduling Staff. (HR\Payroll Staff use FWL 1:)

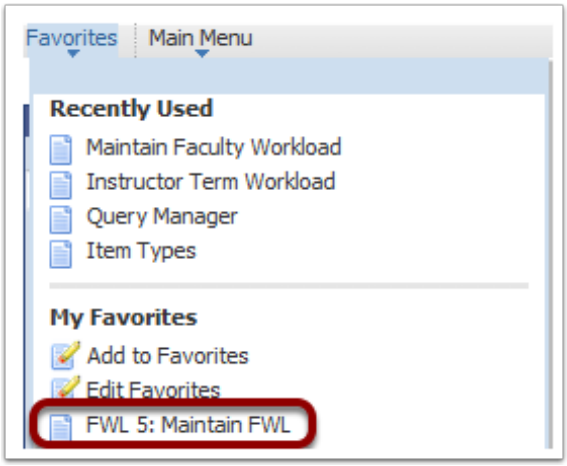
Using a topical reference (FWL) with a number order (5:) will help to differentiate groupings and when the system sorts the entries, they are sorted in alpha/numeric order.

3. Click the **OK** button.



4. Click **OK** when the message window will appears.

4. Click the **Favorites** menu to verify the page is saved. It will be listed in alphabetical order under the **My Favorites** section.



List of Recommended "Favorite" Pages with [Description]

Class Scheduling Staff and HR\Payroll Staff have different needs when it comes to processing Faculty Workload. Below is two sets of recommended page links to setup as 'Favorites' based on the order each staff processes FWL.

Class Scheduling Staff:

- Instructor/Advisor Table - [FWL 1: Inst/Adv Tbl]
  - Main Menu > Curriculum Management > Instructor/Advisor Table
- Schedule of Class - [FWL 2: Sched of Class]
  - Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes
- Instructor Term Workload - [FWL 3: Term Workload]
  - Main Menu > Curriculum Management > Instructor Term Workload
- FWL Calculation Process - [FWL 4: Batch Calc Proc]
  - Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Processing > FWL Calculation Process

- **Maintain Faculty Workload** - [FWL 5: Maintain FWL]
  - Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Transaction > Maintain Faculty Workload
- **FWL Contract Generation** - [FWL 6: Contract Gen]
  - Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Processing > FWL Contract Generation
- **Course Catalog** - [FWL 7: Term Workload]
  - Main Menu > Curriculum Management > Course Catalog > Course Catalog
- **Process Monitor** - [TOOLS: Process Monitor]
  - Main Menu > PeopleTools > Process Scheduler > Process Monitor

HR\Payroll Staff:

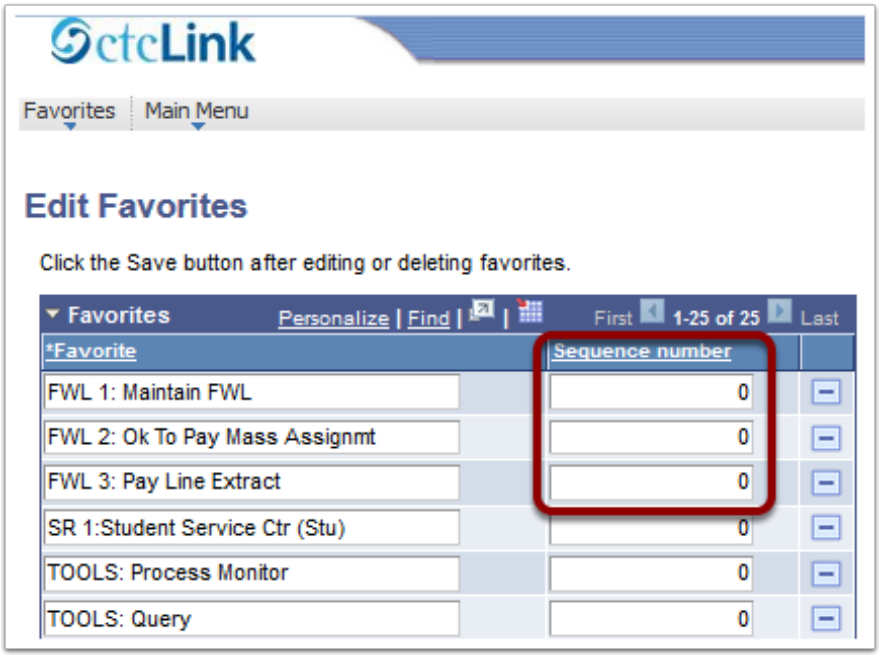
- **Maintain Faculty Workload** - [FWL 1: Maintain FWL]
  - Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Transaction > Maintain Faculty Workload
- **FWL OTP Mass Assignment** - [FWL 2: Ok To Pay Mass Assignmt]
  - Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Processing > FWL OTP Mass Assignment
- **FWL Pay Line Extract** - [FWL 3: Pay Line Extract]
  - Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Processing > FWL Pay Line Extract
- **Process Monitor** - [TOOLS: Process Monitor]
  - Main Menu > PeopleTools > Process Scheduler > Process Monitor
- **Query Viewer** - [TOOLS: Query]
  - Main Menu > Reporting Tools > Query > Query Viewer

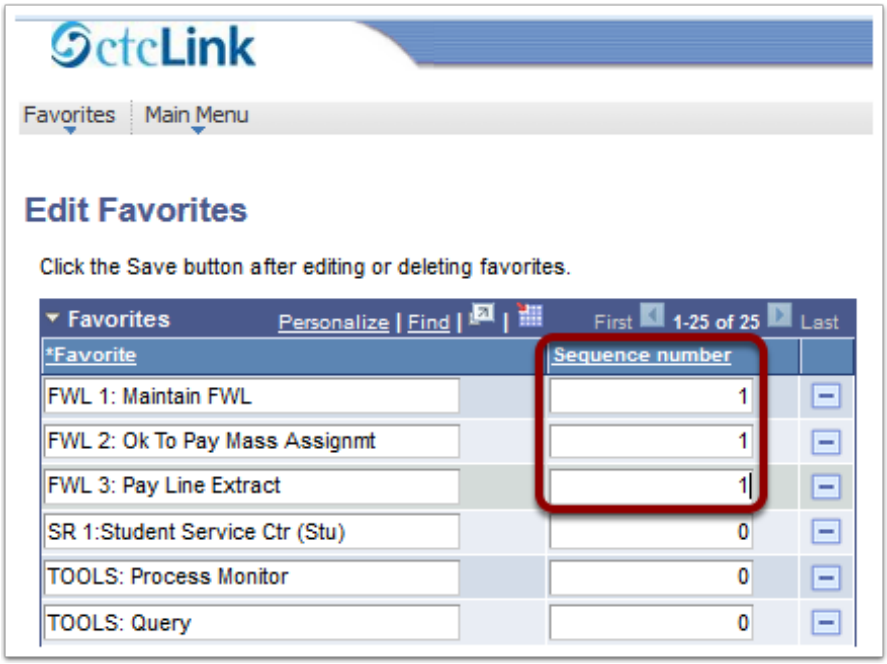
Sequencing Favorites

Favorites can be arranged in a specific order by the user. Use the **Sequence Number** field to group and arrange favorites into sections. Each section is then automatically sorted in alpha/numeric order. By choosing a naming convention that start with the same label and include a number all page links will be ordered in the process flow order that best suits the user.

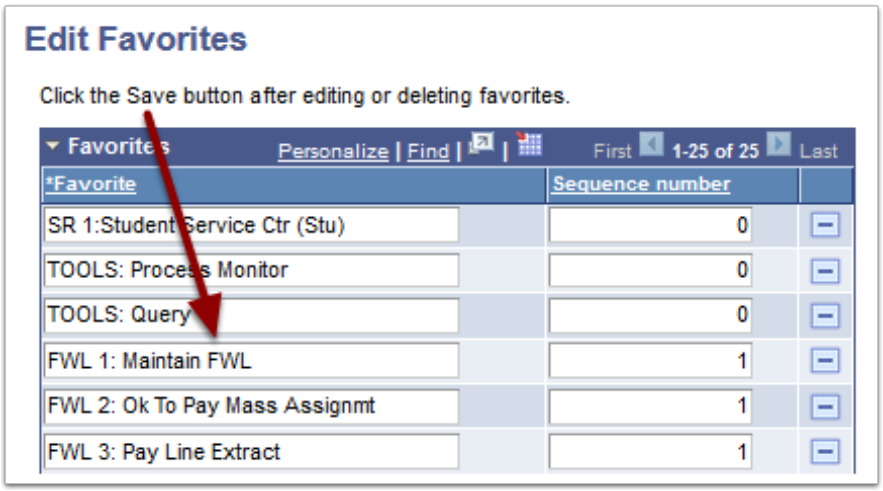
1. Click the **Favorites** menu in the upper, left hand corner.

2. Select **Edit Favorites**.
3. In the **Edit Favorites** page, update the **Sequence Number** from '0' to '1' for all 'Favorites' starting with "FWL."

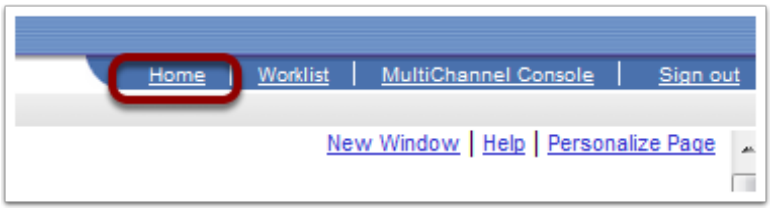




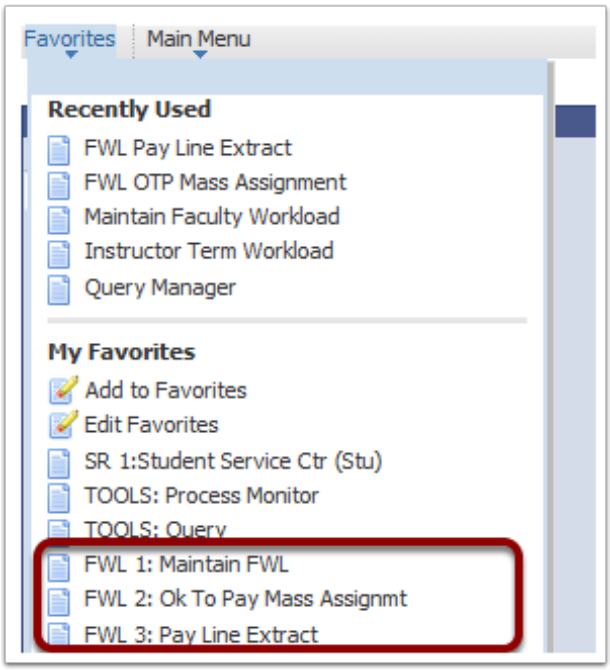
4. Click **Save**. The links will automatically re-order themselves on save.



5. Click the **Home** link in the upper, right hand portion of the window.

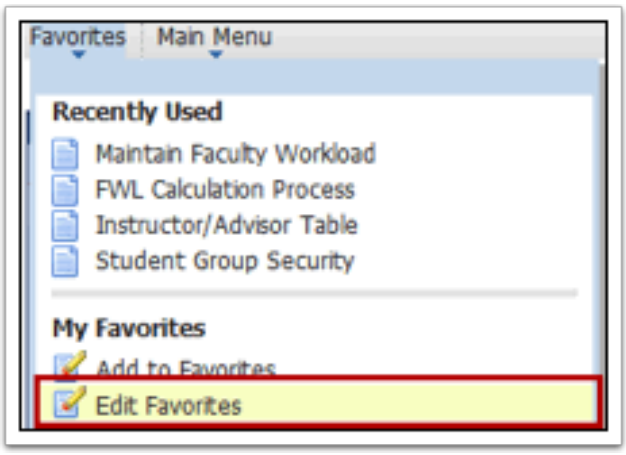


1. Click the **Favorites** menu to view the sequence order changes made.

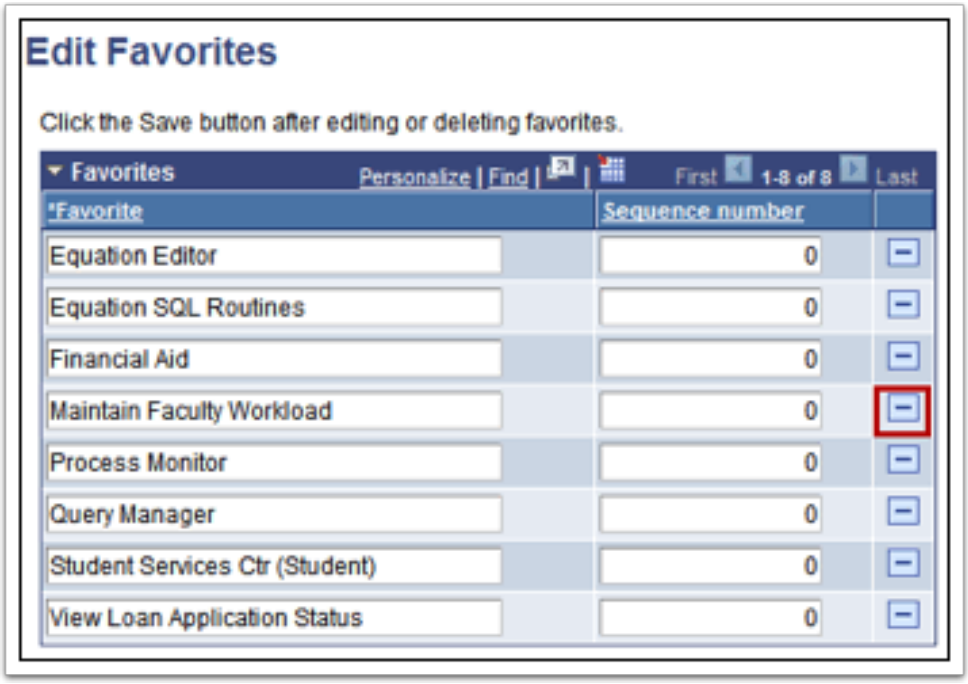


Deleting Favorites

1. Click the **Favorites** menu.
2. Click the **Edit Favorites** link.

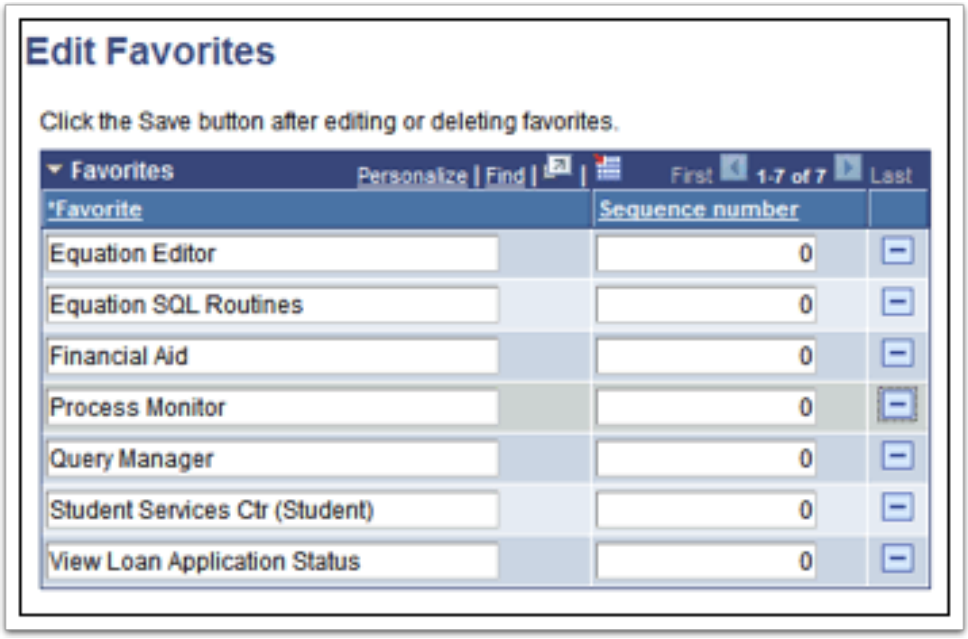


3. Click the **Delete Row (-)** button next the **Favorite** to be deleted.



4. Click the **OK** button.

5. The page link is deleted.


Edit Favorites
Click the Save button after editing or deleting favorites.
Favorites
Personalize | Find |
First 1-7 of 7 Last
*Favorite
Sequence number
Equation Editor 0
Equation SQL Routines 0
Financial Aid 0
Process Monitor 0
Query Manager 0
Student Services Ctr (Student) 0
View Loan Application Status 0

FWL Calculation Processing (Batch)

Purpose: Use this document as a reference for how to use or add a Run Control to schedule the Faculty Workload Calculation Process. Executing the FWL Calculation Process via the Process Scheduler (batch) loads the FWL Grid to the Maintain Faculty Workload page in ctcLink. The FWL Calculation Process allows for Initial Calculation, Recalculation of All Contracts with Changes or Recalculation of an Individual Contract. This document also covers Understanding Process Log Files.

Audience: Class Scheduling Staff, HR\Payroll Staff

Navigation

Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Calculation Process

Alert: Scheduling the FWL Calculation Process requires the **Empl ID** of the Instructor. The **Empl ID Look Up** does not provide a name search feature. You MUST know the **Empl ID** of the instructor BEFORE attempting to enter this in the scheduling parameters!

Initial Calculation

When a new instructor has been assigned to all the intended classes for a term, the next step is to load the instructor and all relevant class information to the Maintain Faculty Workload page using the FWL Calculation Process. Doing so; will populate the Maintain Faculty Workload page, which consists of the FWL Grid, Calculation Result, and a draft Pay Line.

Tip: Executing the **FWL Calculation Process** via the **Process Scheduler** (batch) is only required the first time the FWL Grid is loaded to the **Maintain Faculty Workload** page for an instructor. After the instructor has been processed and exists in FWL, all subsequent calculations can be done within the **Maintain Faculty Workload** page, using the 'Recalc All' for all new and existing contracts (if changed) or using the individual 'Recal' buttons for a specific existing contract (if changed).

Note: The FWL Calculation Process is run only after the instructor has been added to the **Instructor/Adviser Table** and the instructor has been assigned to a class or had a non-instructional assignment added. The following Quick Reference Guides are designed to assist with those processes:

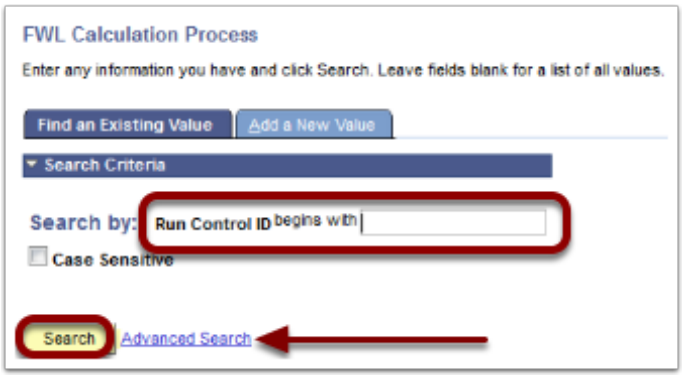
- Adding an Instructor to the Instructor/Adviser Table
- Add Instructor Assignment to Schedule of Class
- Processing Non-Instructional Faculty Workload

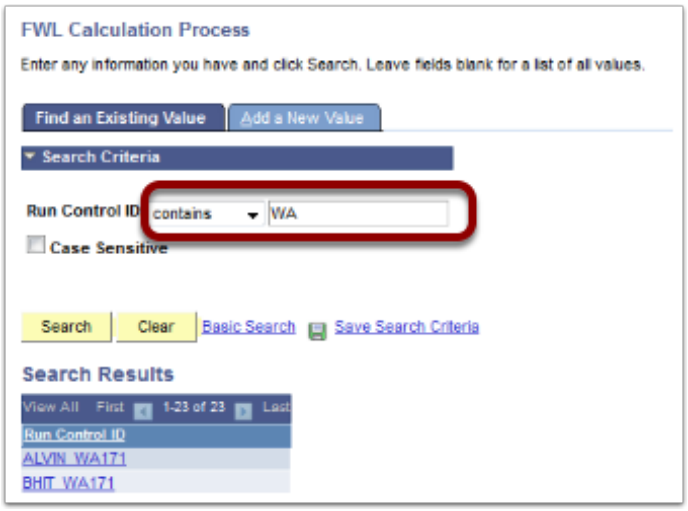
1. Navigate to the **FWL Calculation Process** to search for and use or add a new **Run Control ID.**

Tip: A **Run Control ID** is used to allow saving of scheduling parameters for a specific process for later re-use. An ID can be used again with the same parameters or edited to change parameters. It is saved automatically when the Run button is clicked. Run Control IDs are user specific, which means:

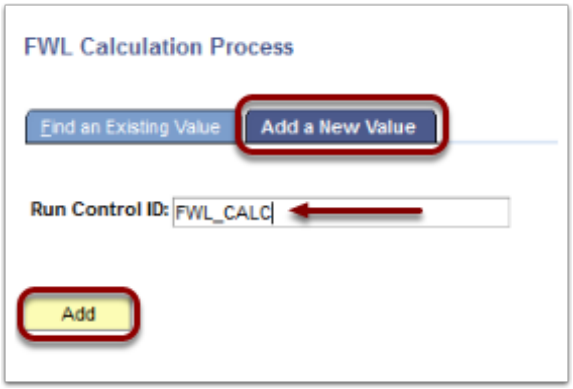
- It is named by the user.
- Can only be seen by that user.
- Follows the user wherever they login from, regardless of browser or computer.

2. At the **FWL Calculation Process** search page, search for an existing run control by:
   - Leaving the **Run Control ID:** blank and clicking the **Search** button.
   - Using *Basic Search*: Entering the first few letters of an existing ID and clicking the **Search** button searching for any **Run Control ID** that 'begins with' those letters.
   - Using Advanced Search: Click the **Advanced Search** link and select the desired search operator (e.g. contains) from the drop down menu and enter a value as search criteria (e.g. WA).

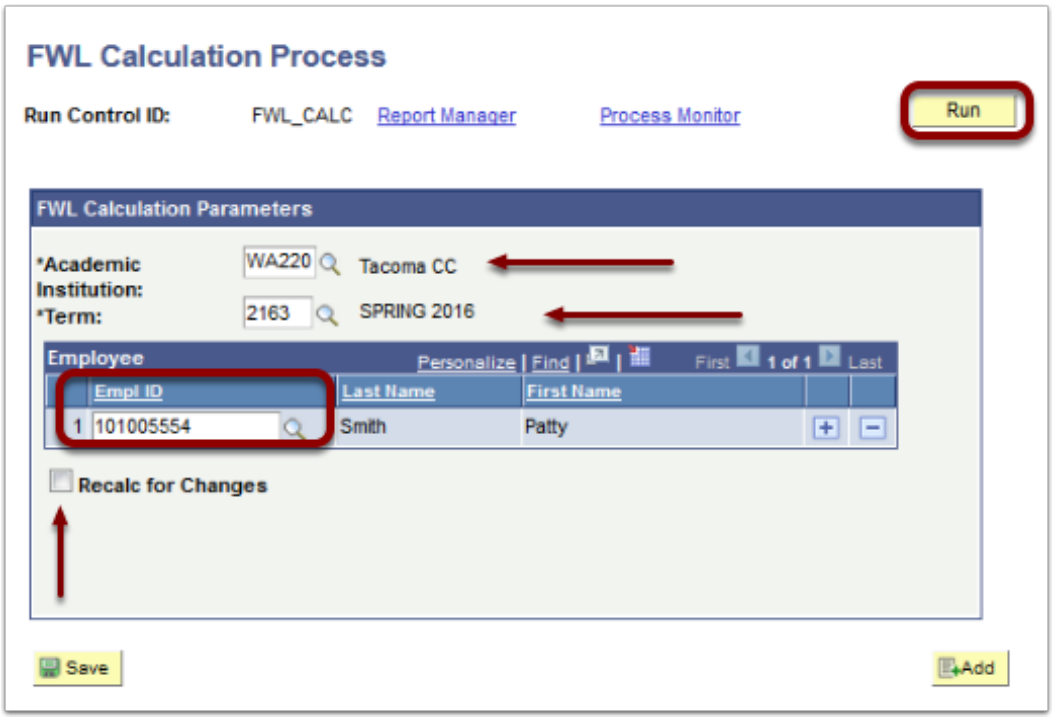




3. If no **Run Control ID** exists, of a new one is desired, click the **Add a New Value** tab.
4. Enter the **Run Control ID** in the open text box (e.g. FWL_CALC) and click **Add.**



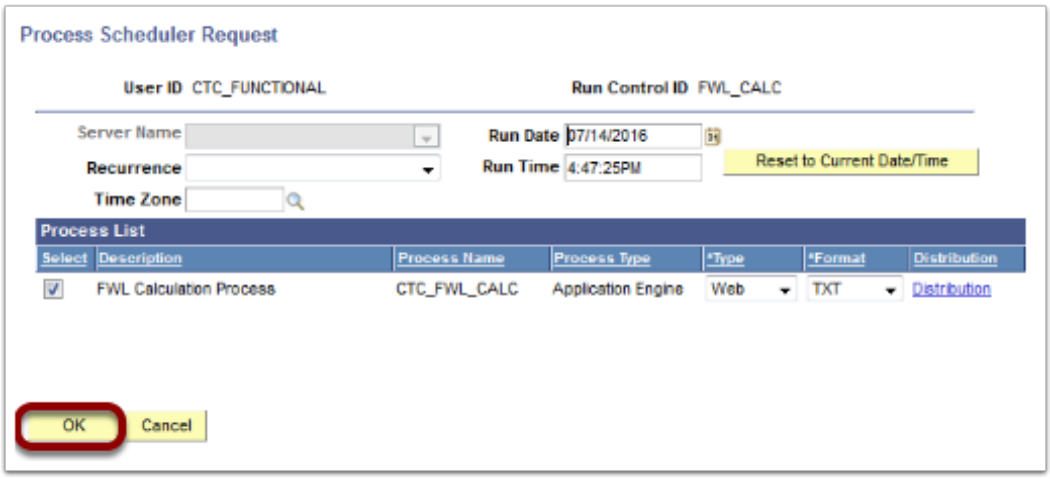
3. On the **FWL Calculation Process** parameters page enter the following:
   - **Academic Institution:** Enter or use the lookup.
   - **Term:** Enter or use the lookup.



> ⚠ **Warning**: Instructors missing their **Instructor/Advisor Table** will error when entering their Empl ID. Refer to the Quick Reference Guide on [Adding an Instructor to the Instructor/Advisor Table](#).

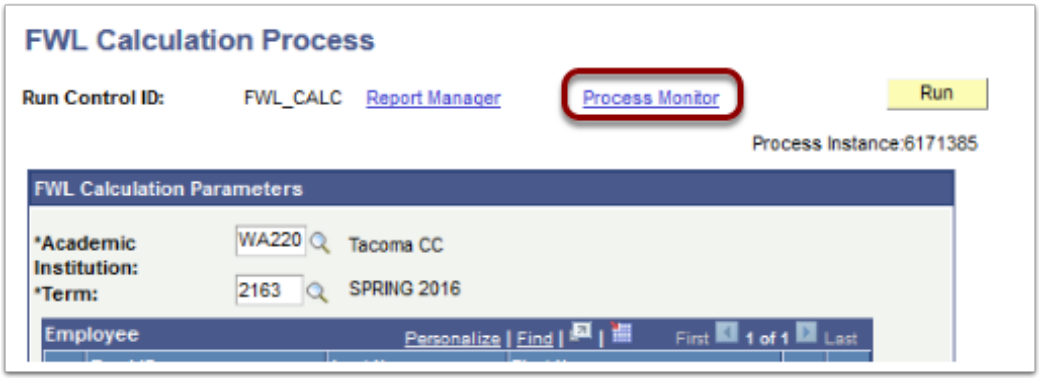
- **Empl ID**: Enter the Empl ID for the instructor(s) to be initialized. If your college requires each division to manage their own instructor calculations, DO NOT leave this field blank. Leaving the field blank will calculate ALL instructors assigned to classes at the institution. Use the plus (+) symbol to add a new row for each additional Empl ID.
- **Recalc for Changes**: Leave unchecked if executing this process for the first time this term for the instructor. If there are changes to class information or new, additional assignments check the box to recalculated.

4. Click the **Run** button to open the **Process Scheduler Request** pop-up window.

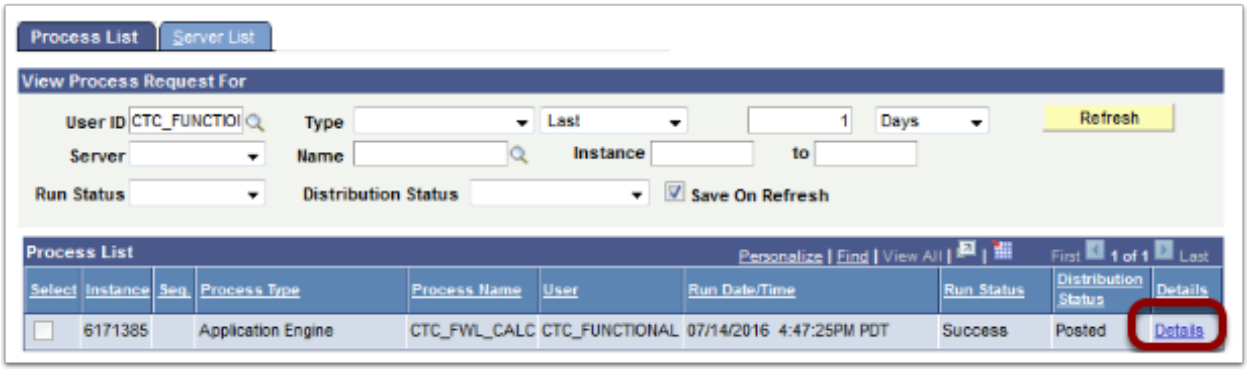


5. At the **Process Scheduler Request** page click **OK** to launch the process and return to the scheduling parameters page.

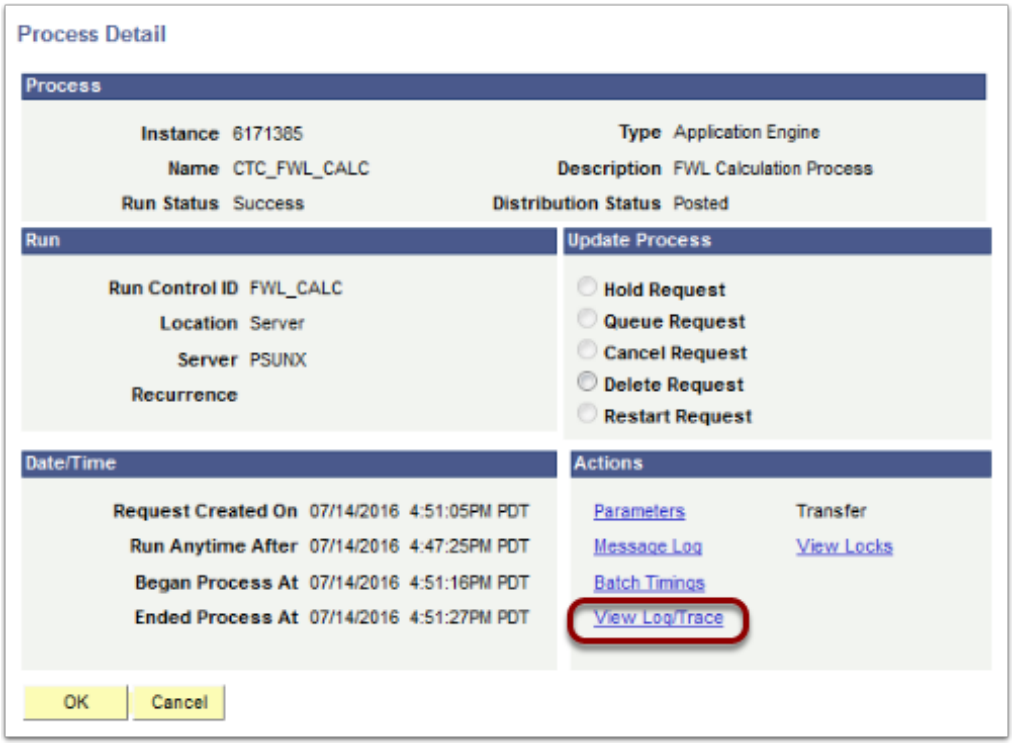
6. At the **FWL Calculation Process** parameters page, click the **Process Monitor** link to monitor the process and access the log file.



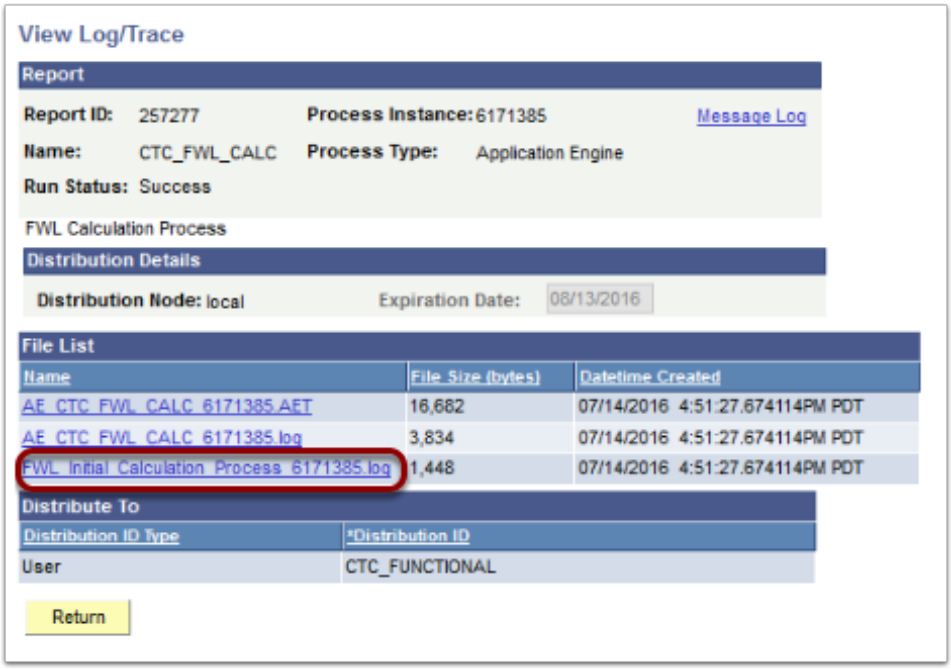
7. In the Process Monitor, the **Run Status** will progress from *Queued* -*Initialized* -*Processing* to either *Success* or *No Success*. With a Run Status of *Success* or *No Success* the **Details** link will provide access to batch process log files when the **Distribution Status** changes to *Posted*. Click the **Details** link to view the log files.



8. In the **Process Details** page click the **View Log/Trace** link in the **Actions** section at the bottom of the page.



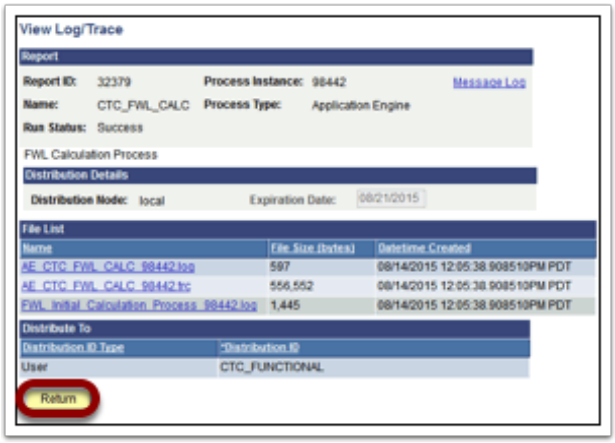
9. In the **View Log/Trace** page, click the **FWL_Initial_Calculation_Process_*nnnnnn*.log** link.



10. The Empl IDs entered in the scheduling parameters will be displayed in the **Process/ Interface Log**. If there were errors in attempting to calculate, the Empl ID will appear in the Calculation Error Log below the scheduling parameters. If the initialization was successful the Empl ID, Assignment Type and Contract Type will appear for each successfully initialized FWL Grid record. If the process ran to *No Success*, skip to step 13.

```
*************************************************************************
                          Process / Interface Log
*************************************************************************
 Process Instance    : 98442              Operator ID         : CTC_FUNCTIONAL
 Process Name        : CTC_FWL_CALC       Run Date/Time       : 08/14/2015 12:05:29
*************************************************************************
                           Run Control Parameter
*************************************************************************
 Run Control ID        (RUN_CNTL_ID)        : WA171
 Academic Institution  (INSTITUTION)        : WA171
 Term                  (STRM)               : 2153
 Recalculate           (CTC_FWL_RECALC)     : N

 Academic Institution  (INSTITUTION)        : WA171
 Empl ID               (EMPLID)             : 101001234

*************************************************************************
    Calculation Error Log - (If program has faced any error during calculation)
*************************************************************************
*************************************************************************
           Initial Calculation Process is completed for below employee(s)
*************************************************************************
 Emplid: 101001234 - Assignment Type: COR - Contract Type: A12
```

11. When finished reviewing the log file simply close the tab or window in your browser that contains the log file display to return to the **View Log/Trace** page, then click the **Return** button at the bottom of the page to return to the **Process Detail** page.



12. At the **Process Detail** page click the **OK** button to return to the Process Monitor page, or simply navigate to the Maintain Faculty Workload page, the next step in the process. To view the initialized records follow the Quick Reference Guide on using the **Maintain Faculty Workload** page.

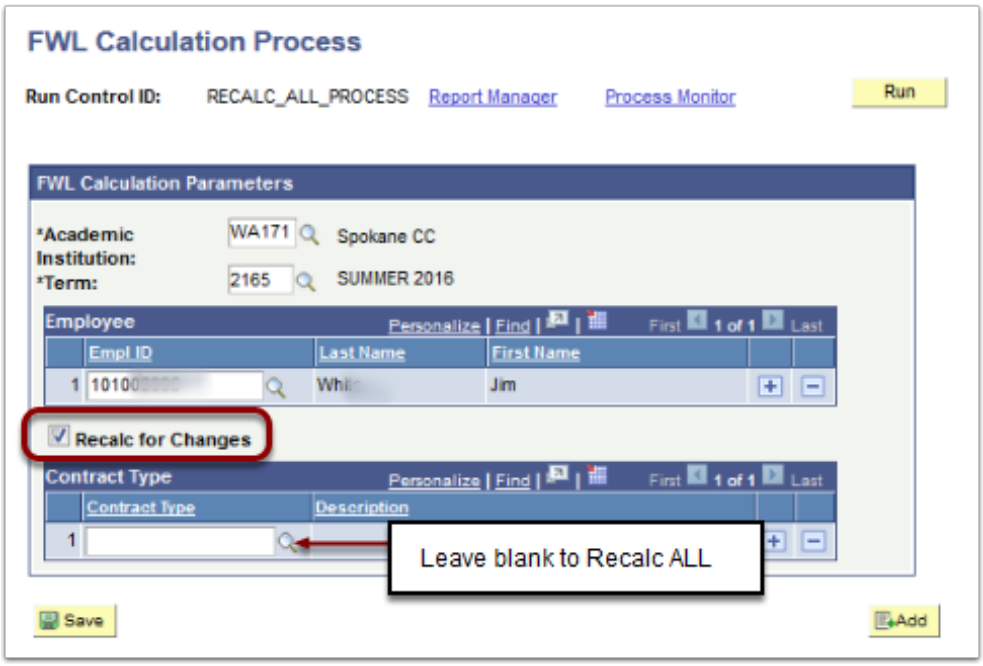
> **Tip:** Once the FWL Grid has been loaded, some additional maintenance of specific fields may be required (depending on the formulas configured) to add additional information. If so, a second recalculation would be performed to finalize the contract data and ensure the Pay Line (payroll payments) Non-instructional, some Continuing Education and any prorated contracts will require additional edits within the FWL Grid before an online contract page can be generated. Generation of the online contract page is a separate batch process.

If an instructor has already had their initial calculation performed for that Term, the process will run to success, but the Calculation Error Log section of the log file will display the message "Please run the recalculation process for below employee(s)." You will need to re-run the process with the Recalc for Changes check box checked.

```
*******************************************************************************
                              Process / Interface Log
*******************************************************************************
 Process Instance    : 6171453            Operator ID          : [illegible]
 Process Name        : CTC_FWL_CALC       Run Date/Time        : 07/18/2016 13:02:50
*******************************************************************************
                              Run Control Parameter
*******************************************************************************
 Run Control ID        (RUN_CNTL_ID)        : Docu_Init
 Academic Institution  (INSTITUTION)        : WA171
 Term                  (STRM)               : 2165
 Recalculate           (CTC_FWL_RECALC)     : N

 Academic Institution  (INSTITUTION)        : WA171
 Empl ID               (EMPLID)             : 101002[illegible]5

*******************************************************************************
    Calculation Error Log - (If program has faced any error during calculation)
*******************************************************************************
*******************************************************************************
            Please run the recalculation process for below employee(s)
*******************************************************************************
 Emplid: 1010[illegible] - Assignment Type: 002 - Contract Type: F02
 Emplid: 1010[illegible] - Assignment Type: K02 - Contract Type: K02
 Emplid: 1010[illegible] - Assignment Type: M02 - Contract Type: M02
```

Recalculation of All Contracts with Changes

A instructor can be recalculated, either online (on the Maintain Faculty Workload page) on in batch, using the FWL Calculation Process. When recalculated in batch, the Recalc for Changes check box is checked. Checking this box displays the Contract Type section. If the Contract Type parameter is left blank, ALL Contract Types for any instructor listed will be picked up for recalculation, and any new, changed or deleted instructor assignments, either from Schedule of Class or non-instructional assignment in the Instructor Term Workload page will be processed.

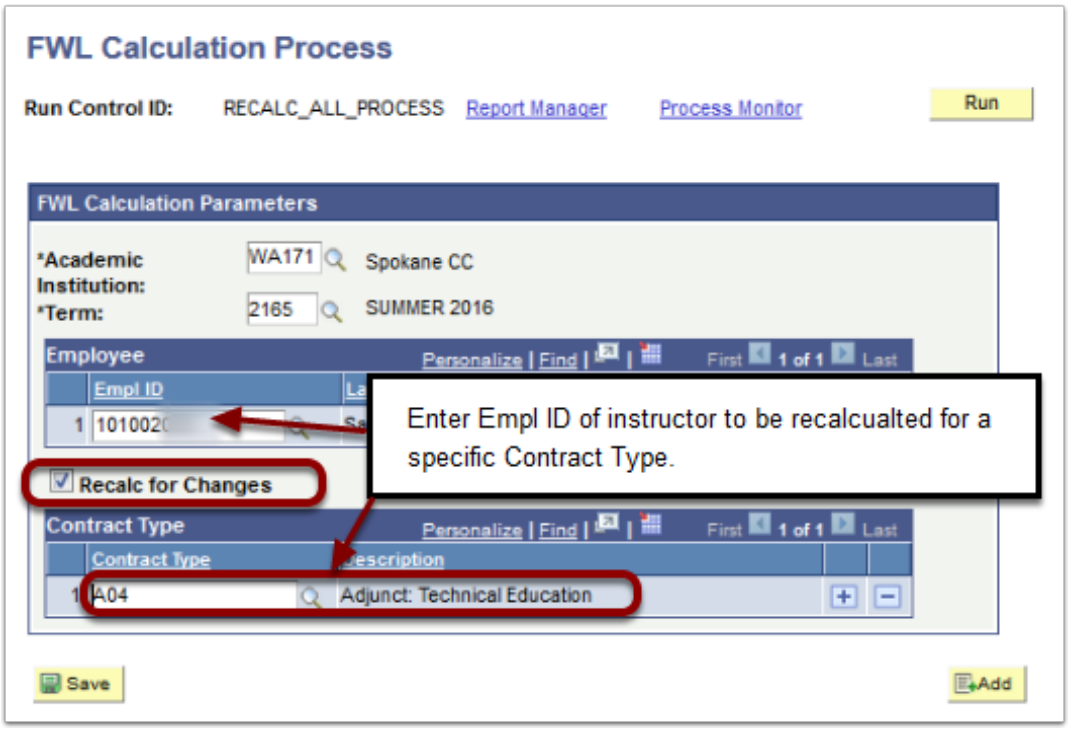


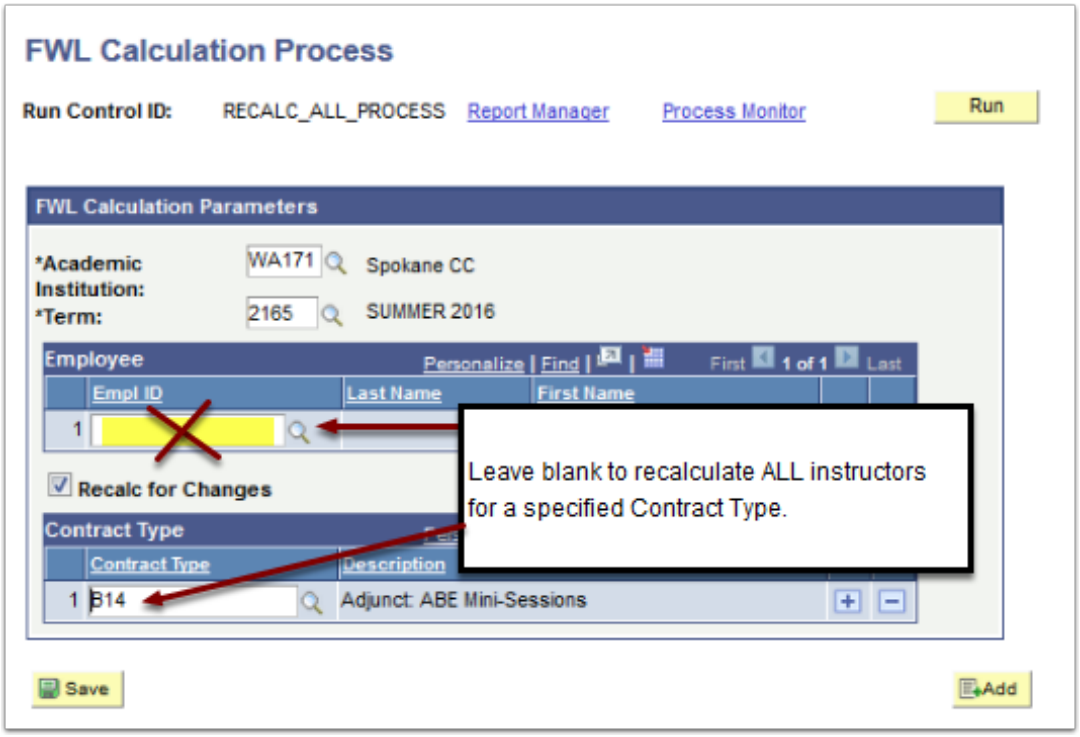
Recalculation of an Individual Contract Type

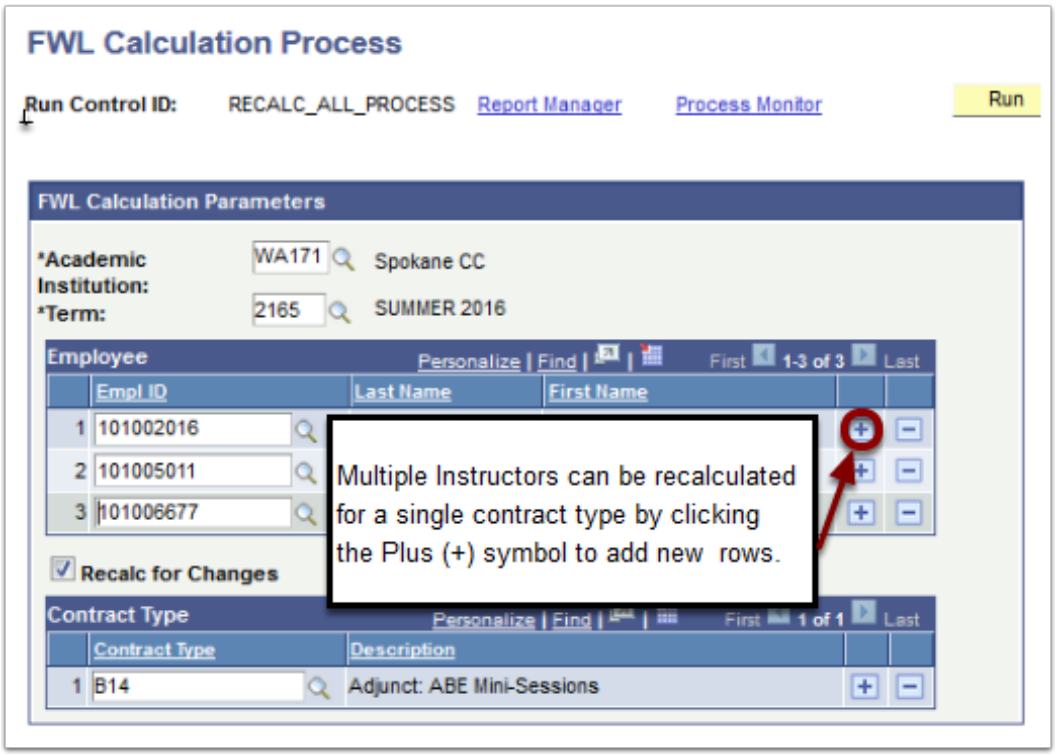
A instructor can be recalculated, either online (on the **Maintain Faculty Workload** page) or in batch, using the **FWL Calculation Process**. When recalculated in batch, the **Recalc for Changes** check box is checked.

Checking this box displays the **Contract Type** section. When the **Contract Type** parameter is left blank ALL contracts for the listed instructors are recalculated. When the **Contract Type** parameter is populated, the specified **Contract Types** for any instructor listed will be picked up for recalculation, and any new, changed or deleted instructor assignments, either from **Schedule of Class** or non-instructional assignment in the **Instructor Term Workload** page will be processed.

The recalculation process can be executed for a single instructor or many instructors, by clicking the Plus (+) symbol on the Empl ID row and adding more instructor IDs. The recalculation options selected will apply to all instructors entered in the parameters.


FWL Calculation Process
Run Control ID: RECALC_ALL_PROCESS Report Manager Process Monitor
Run
FWL Calculation Parameters
*Academic Institution: WA171 Spokane CC
*Term: 2165 SUMMER 2016
Employee
Personalize | Find | First 1 of 1 Last
Empl ID
1 101002
Enter Empl ID of instructor to be recalcualted for a specific Contract Type.
Recalc for Changes
Contract Type
Personalize | Find | First 1 of 1 Last
Contract Type
Description
1 A04
Adjunct: Technical Education
Save
Add


FWL Calculation Process
Run Control ID: RECALC_ALL_PROCESS Report Manager Process Monitor
Run
FWL Calculation Parameters
*Academic Institution: WA171 Spokane CC
*Term: 2165 SUMMER 2016
Employee
Personalize | Find | First 1 of 1 Last
Empl ID
Last Name
First Name
1
Leave blank to recalculate ALL instructors for a specified Contract Type.
Recalc for Changes
Contract Type
Contract Type
Description
1 B14
Adjunct: ABE Mini-Sessions
Save
Add



Understanding Process Log Files - Status = Success

The FWL Calculation Process generates 3 forms of log files at completion. If the process executes to *Success*, the user only need review the FWL Initial Calculation Process log file to view the information on processed records.

The FWL Initial Calculation Process log file has 3 sections:

1. Calculation Error Log - (If program has faced any error during calculation)

If you received a message in this section, it is likely due to attempting to process a calculation as an 'initial' calculation, when the initial calculation has already been done. The message will direct you to execute the process again, but as a recalculation.

2. Initial Calculation Process is completed for below employee(s):

This is the desired outcome. Instructors whose calculation were successful are displayed with the Assignment Type and Contract Type code. If an instructor has multiple classes, each with a unique Assignment Type it is possible for that instructor to appear on multiple rows, one for each successfully calculated Contract Type.

3. Calculation/Formula Configuration is not defined for below combinations:

If an instructor appears in this section it means a few possible things,

- The Assignment Type chosen is not applicable for the Empl Class of the selected Empl Rcd Nbr. (Translation: You picked a Part Time Assign Type, but the job record is Full Time, or vice-versa).

- The Assignment Type attached to the instructor's class does not have that Subject configured.
- The Assignment Type attached to the instructor's class does not have that Component configured for that Subject.

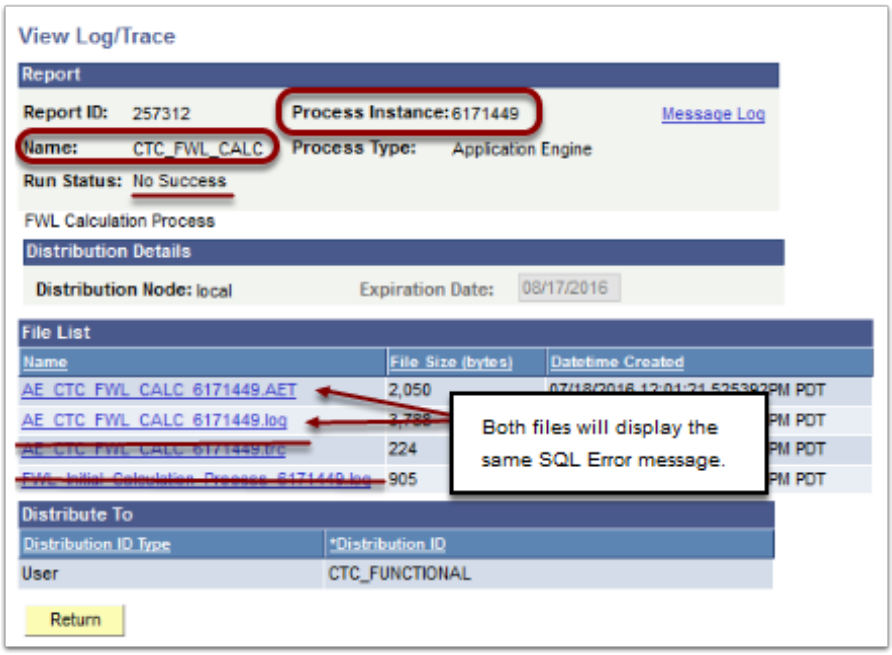
Understanding Process Log Files - Status = No Success

1. If the process executes to a **Run Status** of *No Success* the FWL Calculation Processing log file will appear without the Calculation Error Log and Initial Calculation Process sections. This log file will not provide the information necessary when a process runs to *No Success* because essentially the process has aborted before the log file write is complete.

```
*******************************************************************************
                              Process / Interface Log
*******************************************************************************
 Process Instance    : 99533              Operator ID          : CTC_FUNCTIONAL
 Process Name        : CTC_FWL_CALC       Run Date/Time        : 08/17/2015 07:27:01
*******************************************************************************
                              Run Control Parameter
*******************************************************************************
 Run Control ID        (RUN_CNTL_ID)         : FWLInitialize
 Academic Institution  (INSTITUTION)         : WA171
 Term                  (STRM)                : 2153
 Recalculate           (CTC_FWL_RECALC)      : N

 Academic Institution  (INSTITUTION)         : WA171
 Empl ID               (EMPLID)              : 101000009
```

2. When a process runs to *No Success*, an ERP Support Ticket will need to be filed. To better provide information in filing your ticket you can access the technical log files from the **View Log/Trace** page, by selecting the **AE_CTC_FWL_CALC** log file link.
   1. In the **AE_CTC_FWL_CALC** file ending with 'AET' (application engine trace) the SQL Error message will appear after the row containing the word "ABENDED."
   2. In the **AE_CTC_FWL_CALC** file ending with 'log' the SQL Error message will appear on the line starting with "File:" just above the 'Failed SQL stmt:' row. Both the 'AET' and 'log' files will contain the same error.
   3. In the **AE_CTC_FWL_CALC** file ending with 'trc' no error logging will be evident unless a technician turns on trace logging. This file can be ignored as it only aids the technician during triage.

> **Tip:** When a process runs to *No Success* an ERP Support Ticket is in order. When filing the ticket, make sure to provide the process **Name: CTC_FWL_CALC** and the **Process Instance:** (e.g. 99533). This way the support technician can access the log files produced by the process.



3. If the error seen in the AE_CTC_FWL_CALC log file states that there is a 'single-row subquery returns more than one row' error, then the contract configuration unintentionally has a duplicate assignment type from another contract. the ERP support technical, (or the HR staff person maintaining contract configuration) will need to identify the duplicate record and correct the configuration before you can re-attempt initialization.

Processing Non-Instructional Faculty Workload

Purpose: Use this document as a reference for adding Non-Instructional "Special Assignments" to the Instructor Term Workload page, execute the calculation process and update the Maintain Faculty Workload page to complete the data entry for a Special Assignment contract. Non-Instructional contracts will require some editing of on the FWL Grid and recalculation of the contract from within the Maintain Faculty Workload page to complete.

Audience: Class Scheduling Staff or HR\Payroll Staff

Navigations:

Main Menu → Curriculum Management → Instructor/Advisor Information → Instructor Term Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Calculation Process

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Note: Non-Instructional 'Special Assignments' refers to any workload assignment for which no class exists in Schedule of Class. These include, but are not limited to the following types of assignments:

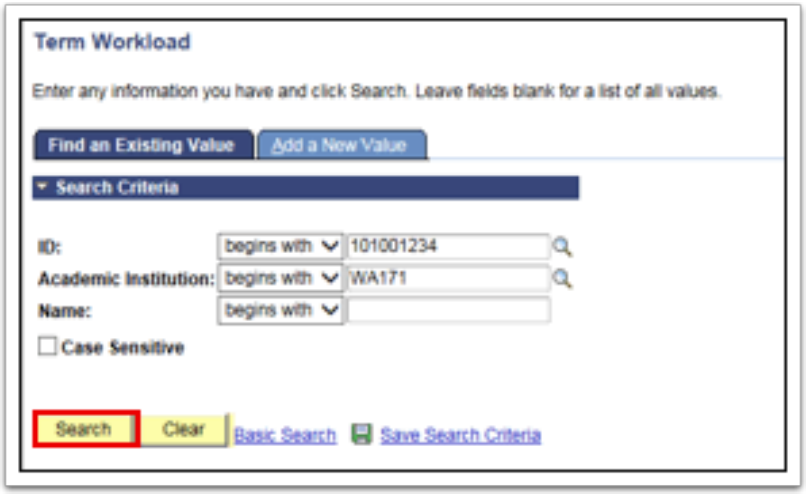
- Release Time (paid or unpaid)
- Counseling or Librarian Assignments (not associated with in-class work)
- WAOL Class Teaching Assignments (where the class is not offered at your institution)
- Continuing Education (non-class)
- Math Lab, Business Technology Labs (where pay is for hours unrelated to the contact hours of the class)
- Special Assignment contracts for community service, course prep, paid office hours, etc.

Add Non-Instructional 'Special Assignment' to Instructor Term Workload

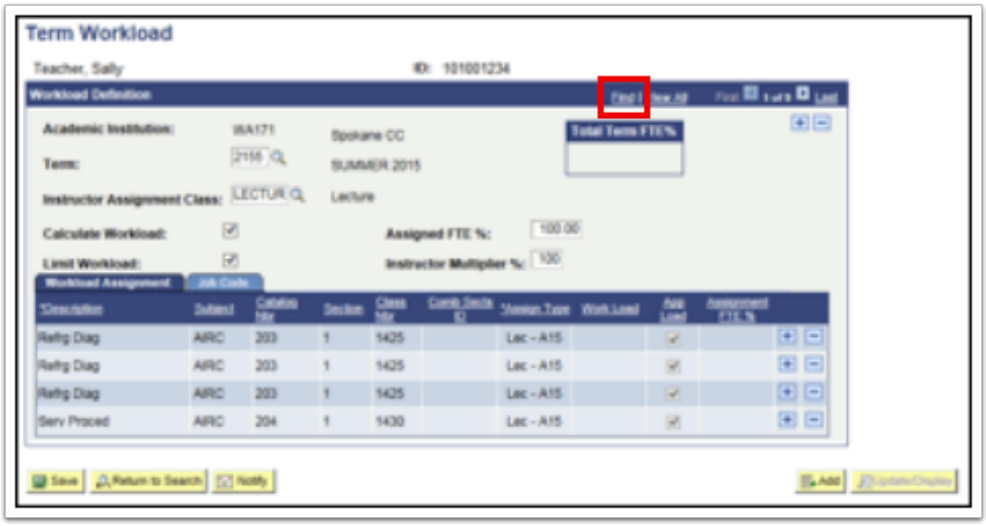
The **Instructor Term Workload** page is a Campus Solutions page designed to display all instructor class assignments, including the job that assignment is associated with. This page has been customized for FWL to allow users to add non-instructional "Special Assignment" work to an instructor to be picked up and calculated for instructor pay and full time equivalency for faculty (FTE%). If an instructor has been assigned to a class, they will have a Term Workload page. The Term Workload page displays all terms for which an instructor has classes or non-instructional assignments. If an instructor has no assignments, then a new Term Workload page can be added.

Instructors with Existing Term Workload

1. Search for the instructor in the **Instructor Term Workload** page enter the following:
   - **ID**: Empl ID of the instructor.
   - **Academic Institution**: Enter value or use lookup.
   - **Name**: If Empl ID unknown, enter at least the first character of the Last Name (Last Name, First Name).

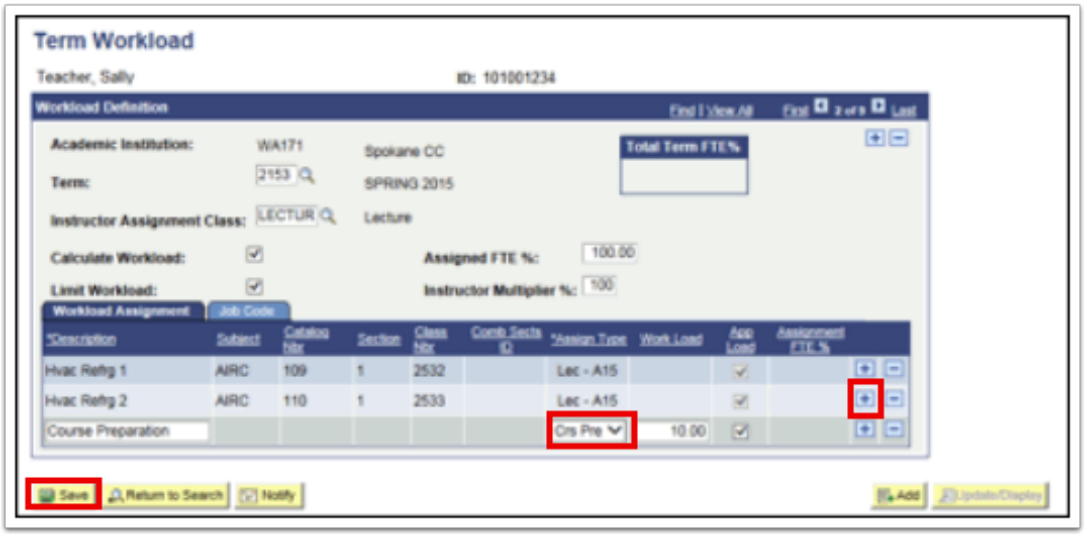


2. Search for the correct Term page by clicking the **Find** link.



3. In the pop-up window enter the Term value, (e.g. 2153) and click **OK**.

4. Once in the correct Term, on the **Workload Assignment** tab, click the **Add a Row (+)** button to add an additional Workload Assignment.



5. On the **Workload Assignment** tab, enter the following:
   - **Description**: Free text field to enter the description of the work being performed. (Does not load into the FWL Grid.)

- **Assignment Type**: Click the drop down menu to select a Non-Instructional Assignment Type, (e.g. Crse Prep).
- **Work Load**: (Optional) Hours of work being performed (Does not load into the FWL Grid).
- Click **Save**.

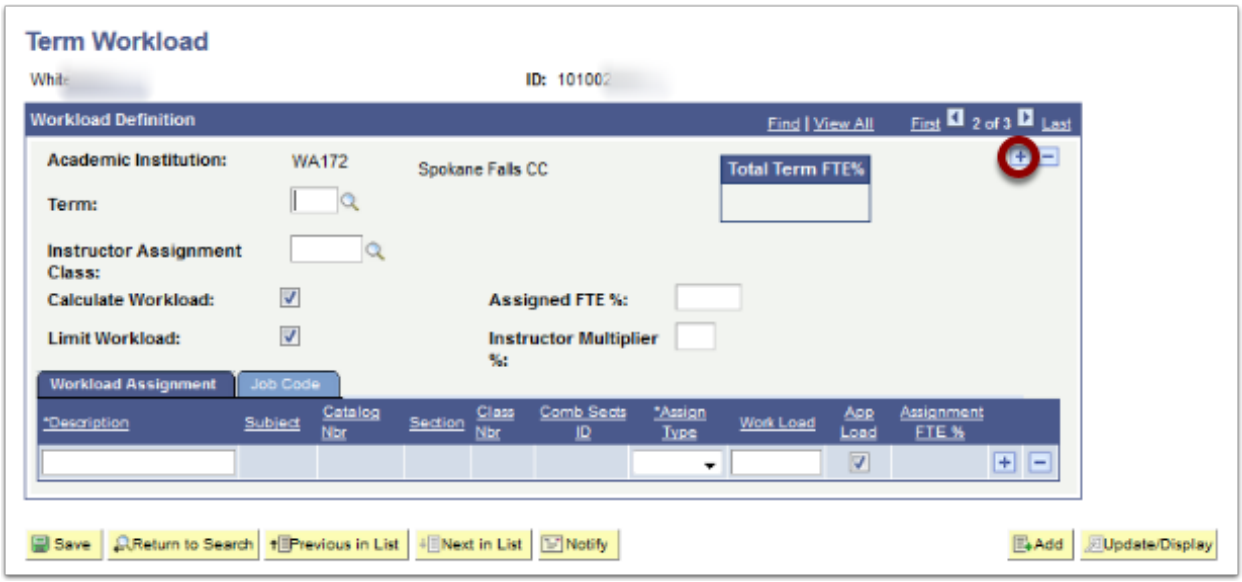
Adding a Term to Instructors with Existing Term Workload Pages

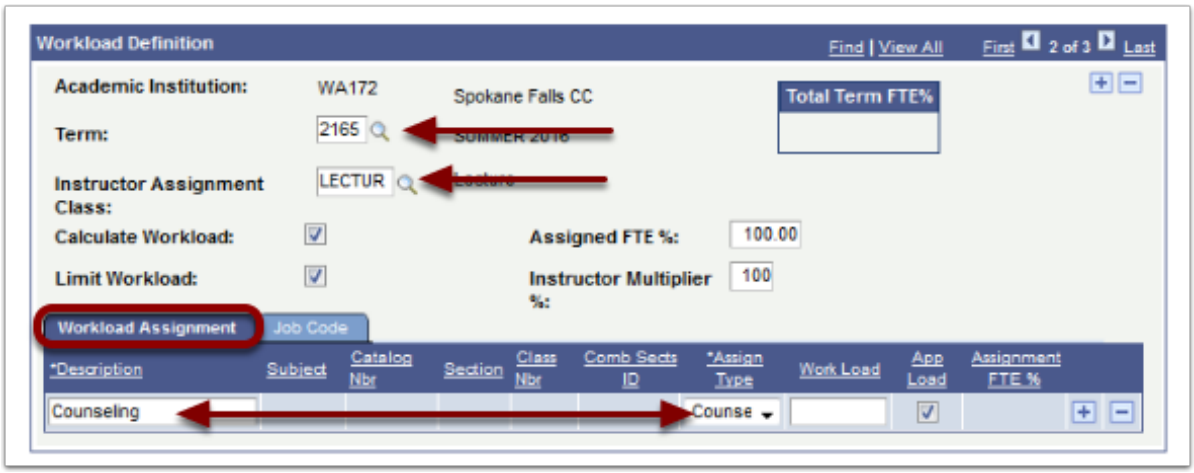
1. Search for the instructor in the **Instructor Term Workload** page enter the following:
   - **ID**: Empl ID of the instructor.
   - **Academic Institution**: Enter value or use lookup.
   - **Name**: If Empl ID unknown, enter at least the first character of the Last Name (Last Name, First Name).

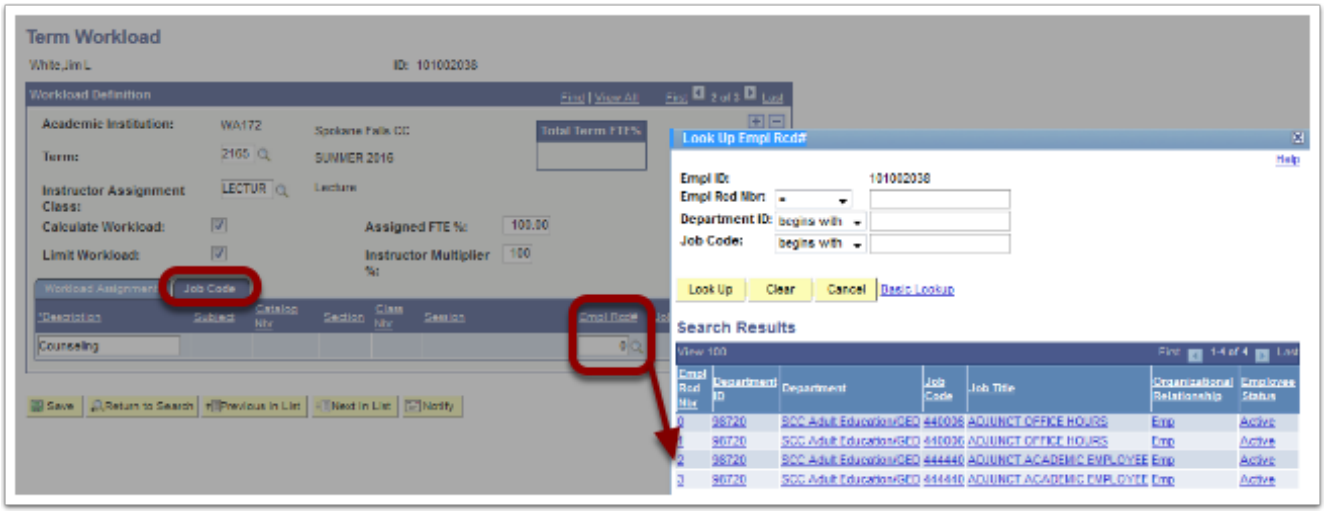
2. Click the Plus (+) symbol in the upper right side of the page, under the Workload Definition section header and on the new page enter the following:
   - **Term:** Enter the term of the non-instructional assignment, or use the Look Up.
   - **Instructional Assignment Class:** Click in the Assignment Class field and the system will populate **LECTUR**.

3. On the **Workload Assignment** tab, enter the following:
   - **Description**: Free text field to enter the description of the work being performed. (Does not load into the FWL Grid.)
   - **Assignment Type**: Click the drop down menu to select a Non-Instructional Assignment Type, (e.g. Crse Prep).
   - **Work Load**: (Optional) Hours of work being performed (Does not load into the FWL Grid).

4. On the **Job Code** tab, enter the following:
   - **Empl Rcd#:** The Employee's record number
   - Click **Save**.







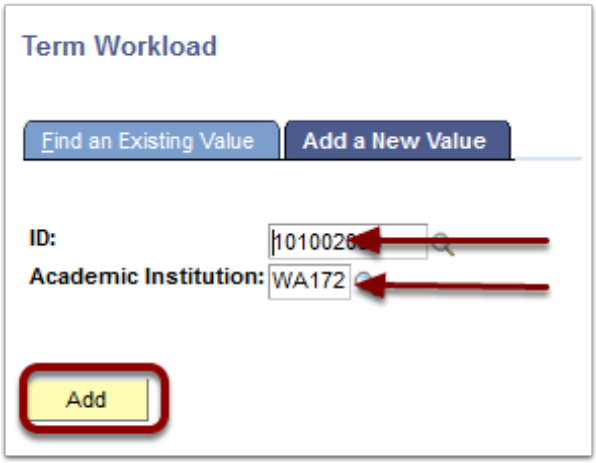
> ⚠ **Warning:** If you receive a warning pop-up alerting you that the "Instructor Class is Full-Time, but the Job is Part-Time" you can ignore this. This is a warning message relative to the delivered Faculty Workload process in PeopleSoft and is unrelated to the custom developed solution. Click **OK** to skip this message and close the pop-up.

Adding A New Term Workload Page

1. Search for the instructor in the **Instructor Term Workload** page enter the following:
   - **ID**: Empl ID of the instructor.
   - **Academic Institution**: Enter value or use lookup.
   - **Name**: If Empl ID unknown, enter at least the first character of the Last Name (Last Name, First Name).
2. If the message 'No Records Selected' appears, click the Add a New Value tab and enter the following:
   - **ID**: Empl ID of the instructor.

- **Academic Institution**: Enter value or use lookup.

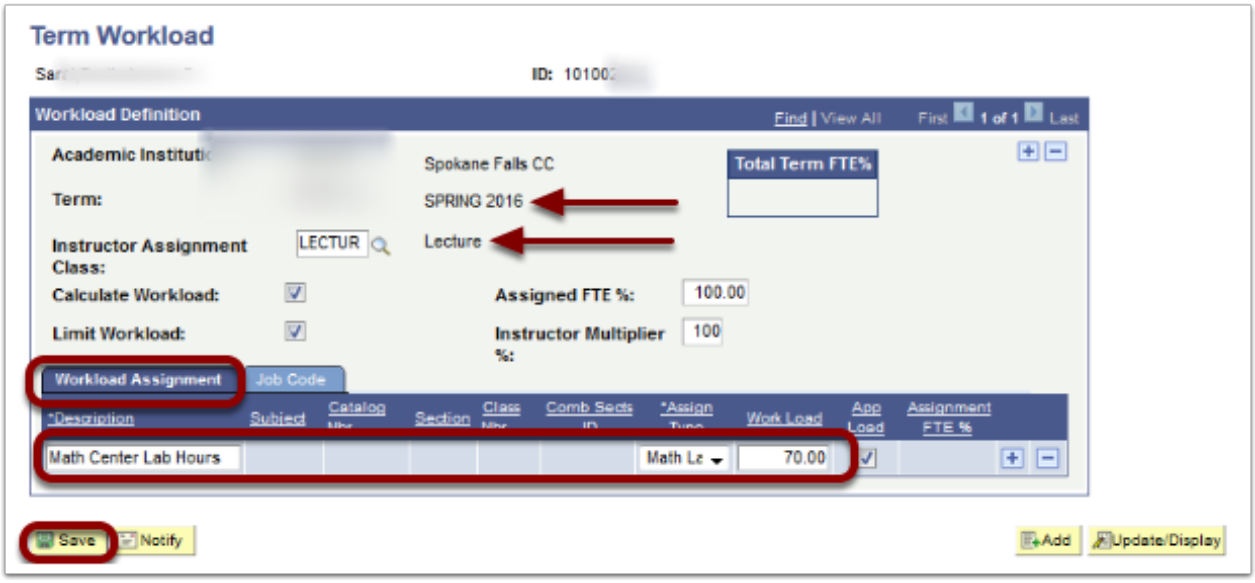
3. Click the **Add** button.



1. A blank Workload Definition page will appear. Enter the following:
   - **Term:** Enter the term of the non-instructional assignment, or use the Look Up.
   - **Instructional Assignment Class:** Click in the Assignment Class field and the system will populate **LECTUR**.

3. On the **Workload Assignment** tab, enter the following:
   - **Description**: Free text field to enter the description of the work being performed. (Does not load into the FWL Grid.)
   - **Assignment Type**: Click the drop down menu to select a Non-Instructional Assignment Type, (e.g. Crse Prep).
   - **Work Load**: (Optional) Hours of work being performed (Does not load into the FWL Grid).

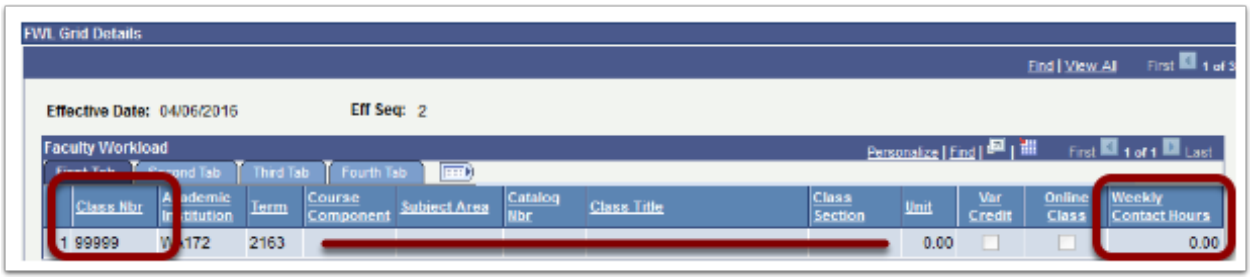
4. On the **Job Code** tab, enter the following:
   - **Empl Rcd#:** The Employee's record number
   - Click **Save**.



Note: After the Instructor Term Workload page has been updated with the non-instructional assignment, run the FWL Calculation Process to load the assignment into the Maintain Faculty Workload page, and build the FWL Grid. Refer the the Quick Reference Guide on FWL Calculation Process (batch).

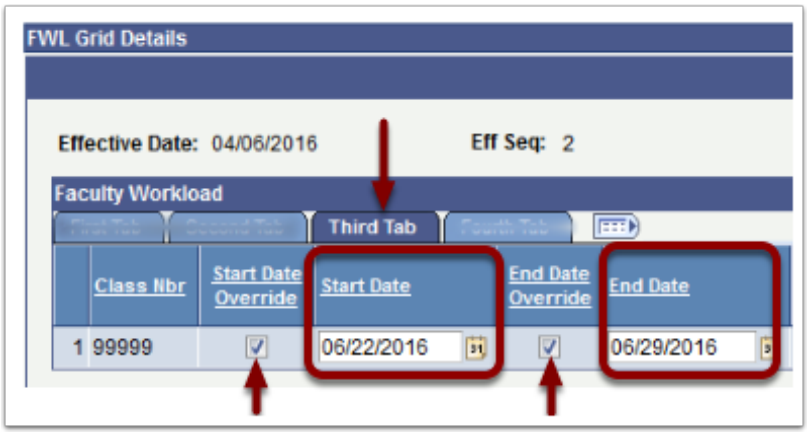
Update Maintain Faculty Workload - FWL Grid to Complete Calculation

1. Navigate to the **Maintain Faculty Workload** page to update the newly added FWL Grid page. All Non-Instruction assignments from the Instructor Term Workload page will load with a 5 digit class number starting with 99999 and increment down in numbers for multiple assignments. Because this assignment is not driven from Schedule of Class the Component, Subject Catalog Nbr, Class Title and Section will not be populated. The Weekly Contact Hours field will be zero, as those hours are driven from class data.

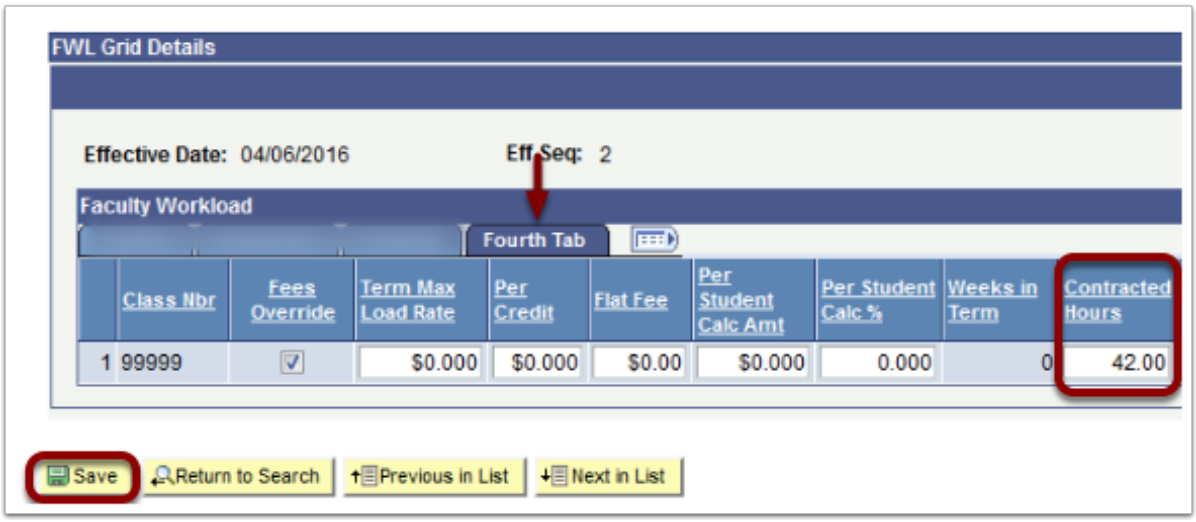


2. When Non-Instructional assignments are loaded to the FWL Grid they are missing 3 key data elements which must be added before the contract is Recalculated in order to generate Pay Line data:
   - Start Date
   - End Date
   - Contracted Hours

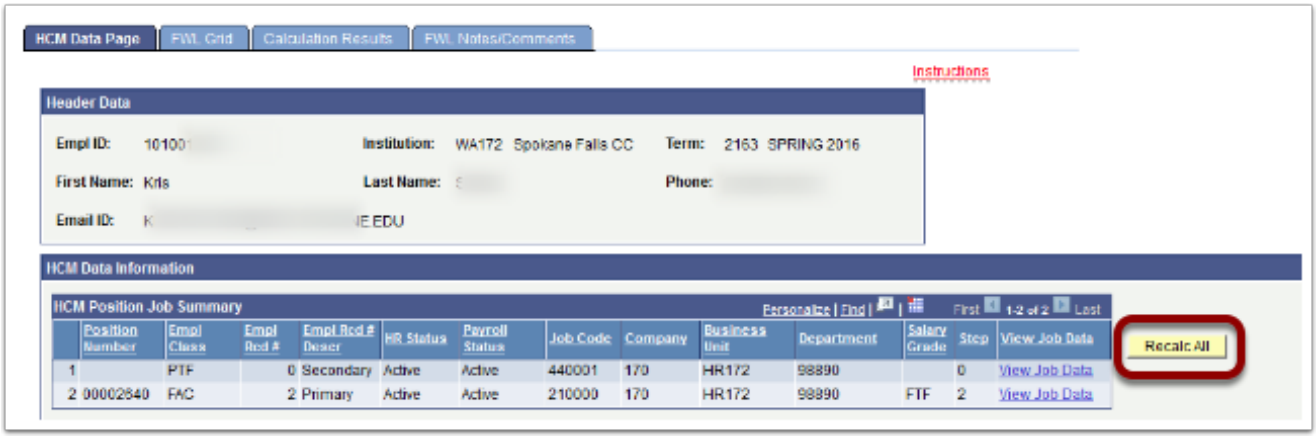
3. On the **Third Tab** of the **FWL Grid** Page, enter the **Start Date** and **End Date** fields with the begin and end date of the Special Assignment. Make sure to check the override check boxes to open the fields for editing.



4. On the **Fourth Tab** on the **FWL Grid** Page, enter the **Contract Hours.**This is the total number of hours associated to this contract for the term.
5. Click **Save** to commit the changes to the **FWL Grid** page.

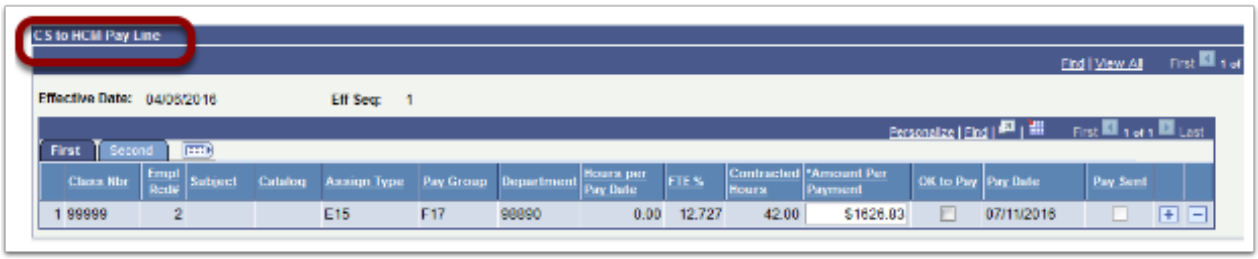


6. In order to recalculate the contract to incorporate those changes, on the **HCM Data Page** tab, click **Recalc All** button.



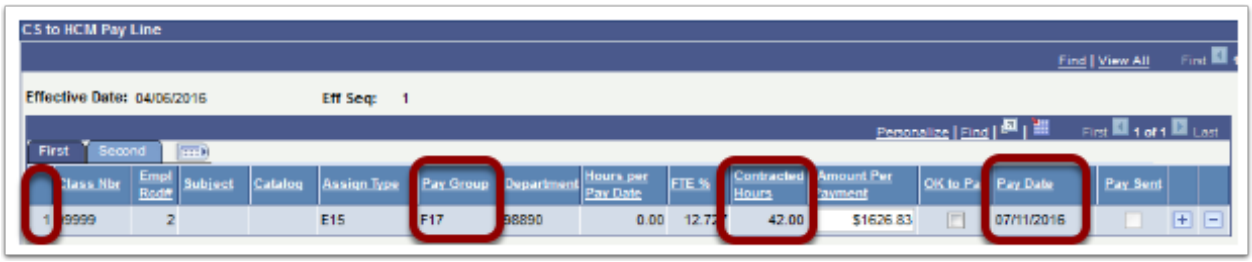
> ⚠ **Warning:** Using the **Recalc All** button on the page will recalculate the non-instructional contract you are attempting to complete, but it may also recalculate other existing/ approved contracts IF there have been changes made in **Schedule of Class** or **Instructor Term Workload** that would change the FTE%\Pay of the existing contract. If this occurs, the existing contract will be rescinded and will require verification before being regenerated.

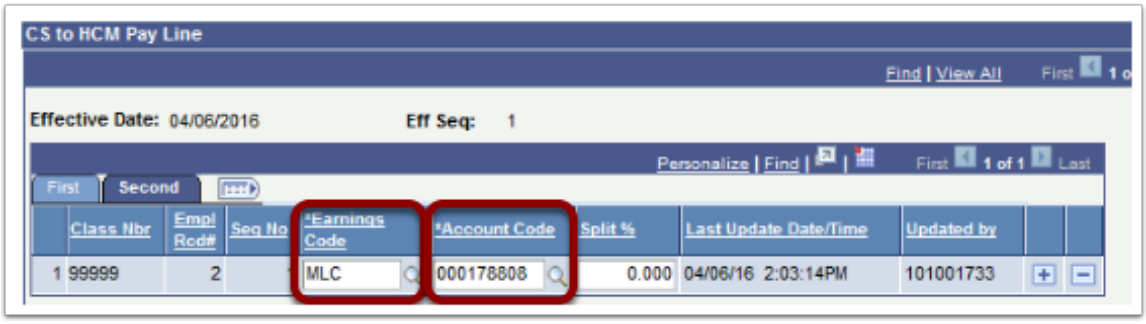
7. When the recalculation is complete, the page will refresh and a **Pay Line** will display at the bottom of the page.



7. On the **FWL Calculation Result** page, review the results to confirm the accuracy of the FTE% and pay.

8. Click back to the **HCM Data** Page and review **Pay Line** for the following:
   - **First Tab:** Verify number of payments were calculated (based on the start\end dates).
   - **First Tab:** Verify that Pay Group is accurate.
   - **First Tab:** Verify the Contracted Hours are accurate.
   - **First Tab:** Make sure the Pay Dates are accurate.
   - **Second Tab:** Verify the Earn Code is as expected, if not update.
   - **Second Tab:** Verify the Account (combo) Code is as expected, if not update.





9. If the draft **Pay Line** is accurate the instructor is ready to have their online contract generated.

> **Note:** For information on how to generate and manage the online contract(s) refer to the Quick Reference Guide - FWL Contract Generation (Batch).

FWL Department Term Summary

Purpose: Use this document as a reference for how to use the Department Term Summary page generates a list of all faculty active contracts, with the FTE% for a single term or range of terms, by a single or multiple HR Departments.

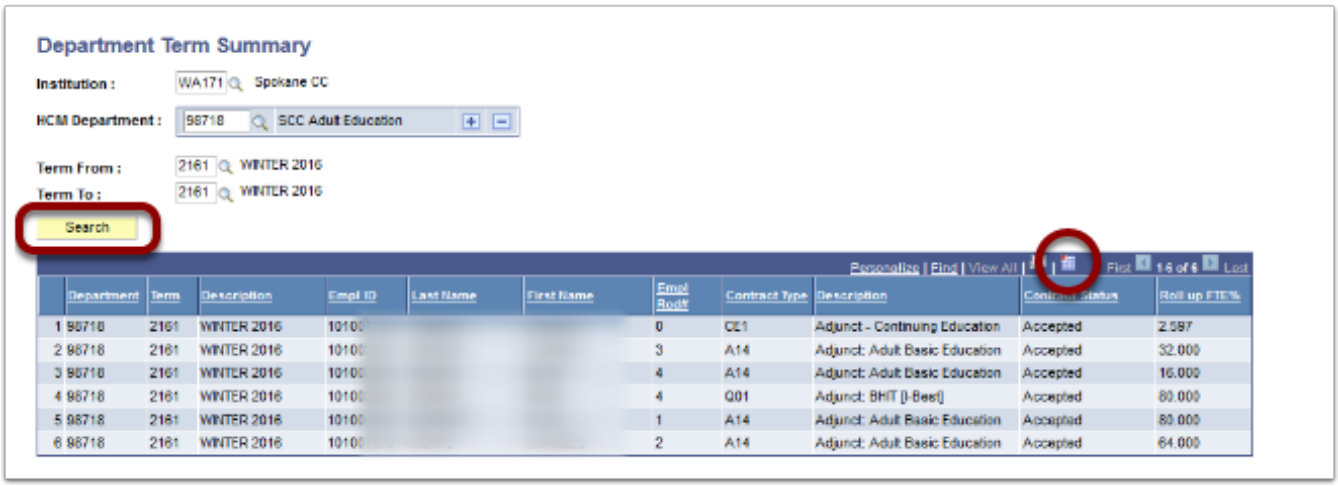
Audience: Class Scheduling Staff, Deans & Division Administrators, HR\Payroll Staff

Navigation: Main Menu > Curriculum Management > CTC Custom > Faculty Workload > Faculty Workload Transaction > Department Term Summary

After instructor pay has been calculated and the contract(s) generated the **Department Term Summary** page can be used to pull lists of all faculty contracts for a single department, all departments in a division, or all departments at an institution. Each contract, with the total FTE% value of the contract is displayed in the result. The list can be exported into an Excel spreadsheet.

Single Department/Single Term

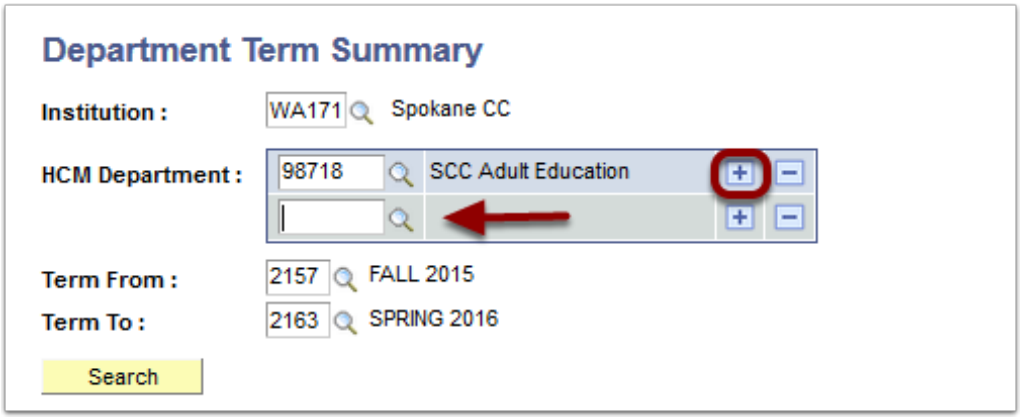
1. Enter the Search Criteria:
   - **Institution:** Enter the institution (e.g. WA171), or use the look up.
   - **HCM Department:** Enter the **HR Department** value (e.g. 98718), or use the look up. HR Department values are tied to the emloyee's job data record, as seen in the Position/Job Summary section in Maintain Faculty Workload.
   - **Term From:** Enter the term.
   - **Term To:** Enter the same term as entered above.
2. Click **Search**.

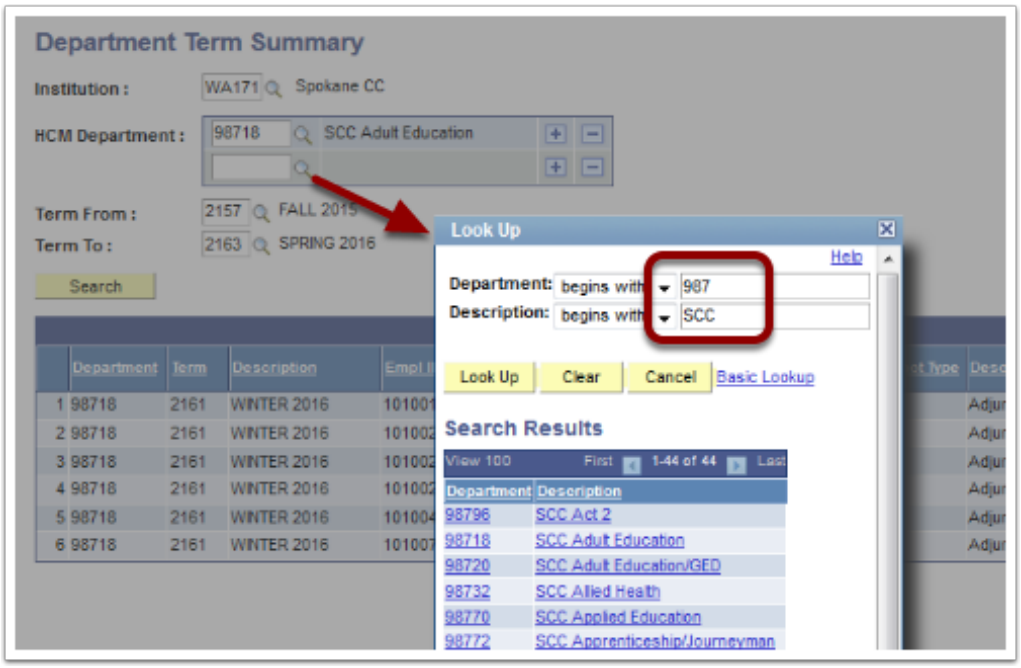


3. After clicking **Search**, the results returned will be sorted in order by **Department**, **Empl ID** and **Term**.
4. Search criteria can be changed, (different departments, different terms) and changes will be reflected in the search results once the **Search** button is clicked.

Multiple Departments / Multiple Terms

1. Enter the Search Criteria:
   - **Institution:** Enter the institution (e.g. WA171), or use the look up.
   - **HCM Department:** Enter the **HR Department** value (e.g. 98718), or use the look up. Click the plus (+) symbol to add additional rows (e.g. 98720). HR Department values are tied to the emloyee's job data record, as seen in the Position/Job Summary section in Maintain Faculty Workload.
   - **Term From:** Enter earliest term in the range (e.g. 2157) or use Look Up.
   - **Term To:** Enter the latest term in the range (e.g. 2163) or use Look Up.
2. Click **Search**.



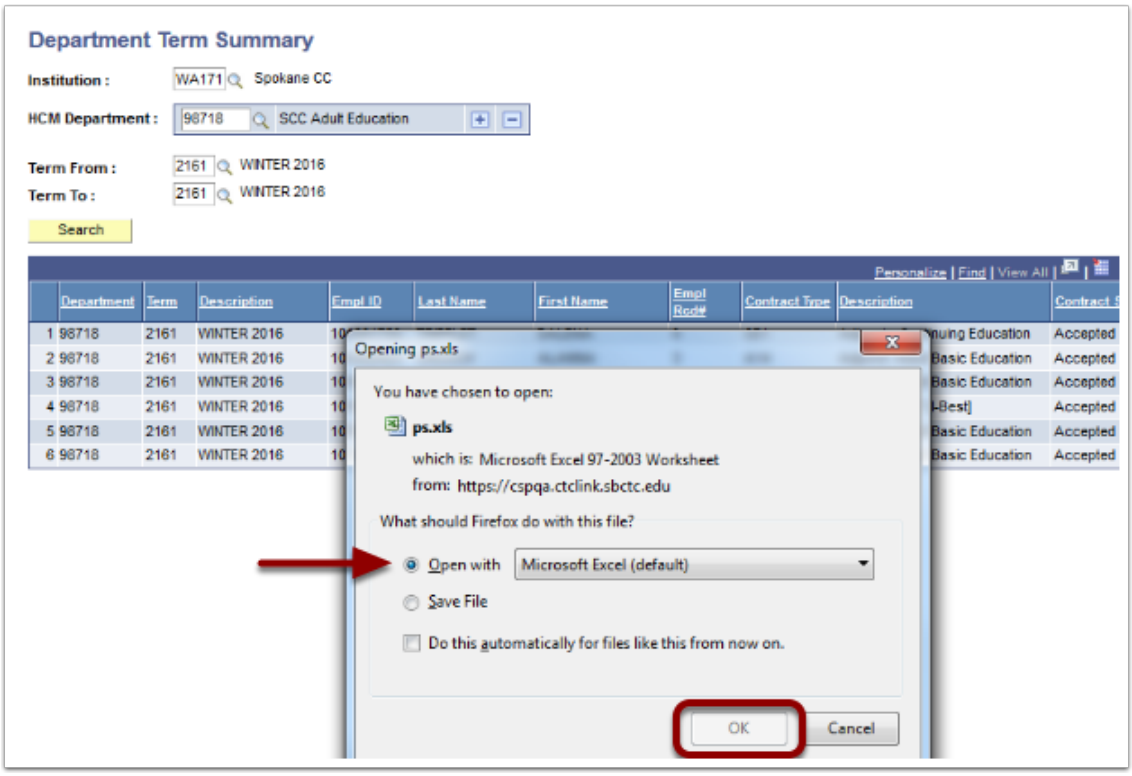


> **Note:** Entering some search criteria in the **Look Up** window and clicking the **Look Up** button will narrow down the list of items to pick from. All departments, both Finace specific and HCM specific will appear in the Look Up window.

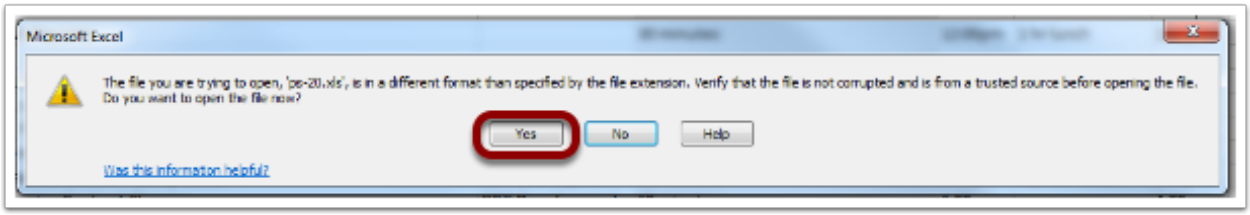
3. After clicking **Search**, the results returned will be sorted in order by **Department**, **Empl ID** and **Term**.
4. Search criteria can be changed, (different departments, different terms) and changes will be reflected in the search results once the **Search** button is clicked.

Export Search Results to Excel

1. (optional) To download the search results and open in Excel, click the **Export** icon, circled in red above.
2. In the Opening ps.xls pop-up window, click the '**Open with**' radial button to activate the **OK** button.
3. Click the **OK** button.

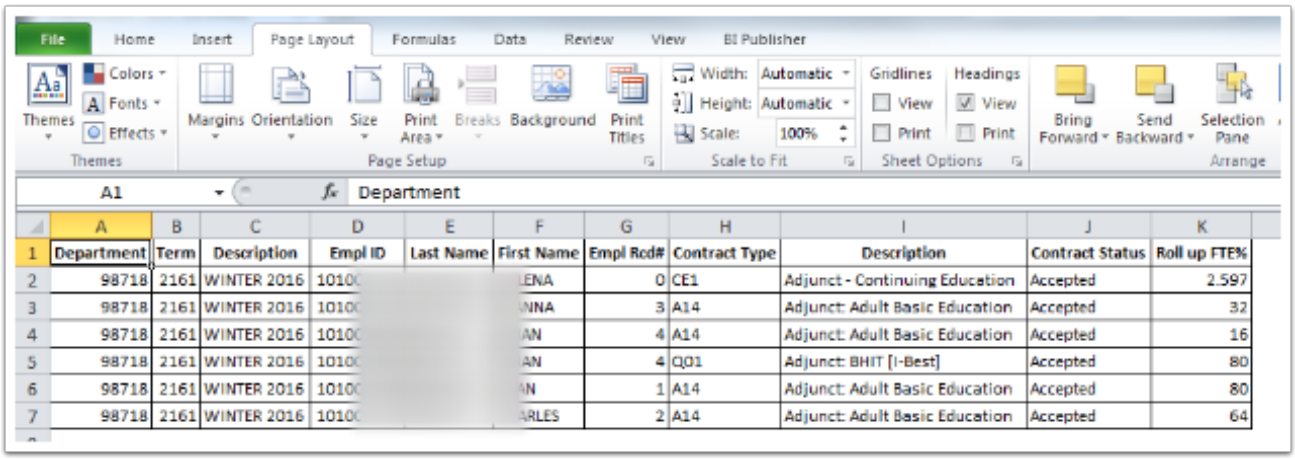


4. The system will open **Excel** and a **Microsoft Excel** message window will appear asking you to verify that the file is not corrupted and is from a trusted source.
5. Click the **Yes** button.



> **Note:** PeopleSoft will support a user having multiple Excel export records open. The first will be named ps.xls, and each subsequent export file will increment up in number, such as the ps-20.xls file open in the example above.

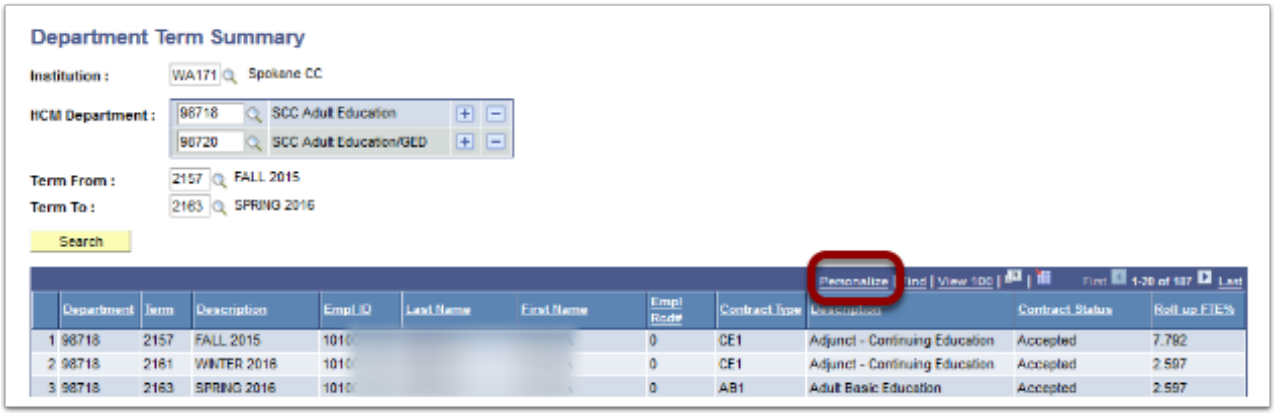
1. Clicking '**yes**' will open the search results in Excel where it can be reformated and saved to your local drive using whatever naming convention is desired.



	A	B	C	D	E	F	G	H	I	J	K
1	Department	Term	Description	Empl ID	Last Name	First Name	Empl Rcd#	Contract Type	Description	Contract Status	Roll up FTE%
2	98718	2161	WINTER 2016	1010		LENA	0	CE1	Adjunct - Continuing Education	Accepted	2.597
3	98718	2161	WINTER 2016	1010		NNA	3	A14	Adjunct: Adult Basic Education	Accepted	32
4	98718	2161	WINTER 2016	1010		AN	4	A14	Adjunct: Adult Basic Education	Accepted	16
5	98718	2161	WINTER 2016	1010		AN	4	Q01	Adjunct: BHIT [I-Best]	Accepted	80
6	98718	2161	WINTER 2016	1010		N	1	A14	Adjunct: Adult Basic Education	Accepted	80
7	98718	2161	WINTER 2016	1010		ARLES	2	A14	Adjunct: Adult Basic Education	Accepted	64

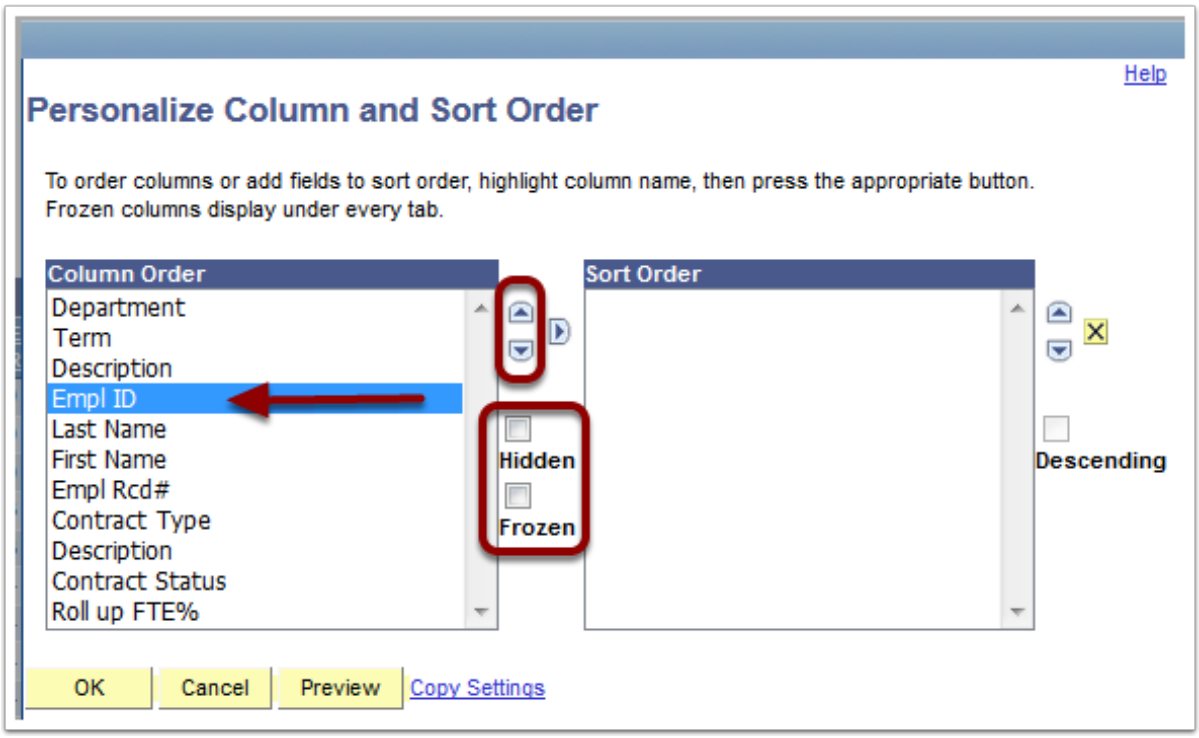
Personalizing the Search Results Display

For users who prefer to have their Search Results display in a different column order or sort order, using the "Personlize' option will provide tailored output. Personalized output will retain its formatting when exported to Excel.

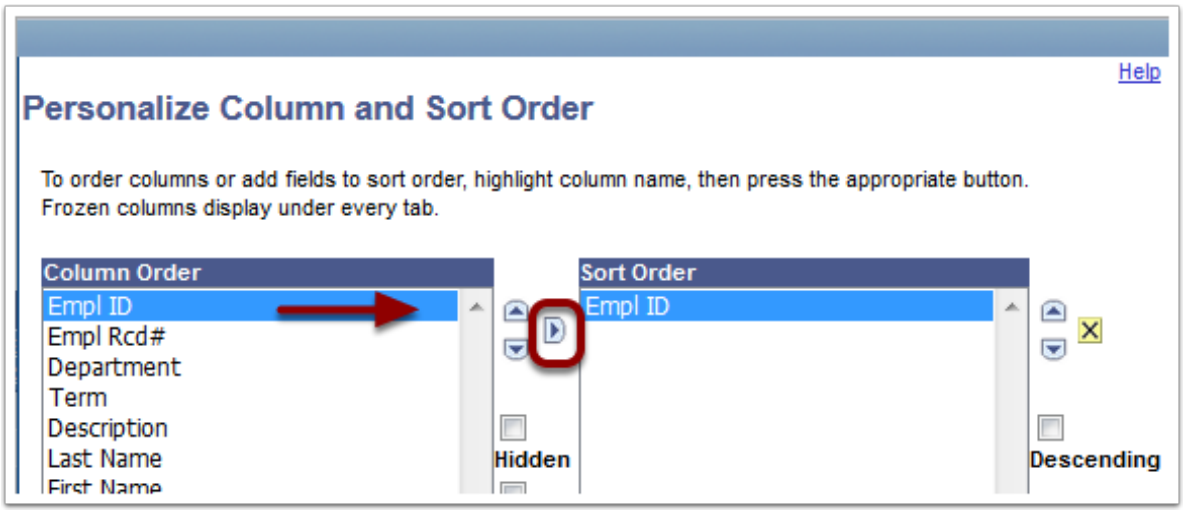


In the **Personalize Column** and **Sort Order** pop-up window there are two boxes. The first box controls the Column Order.

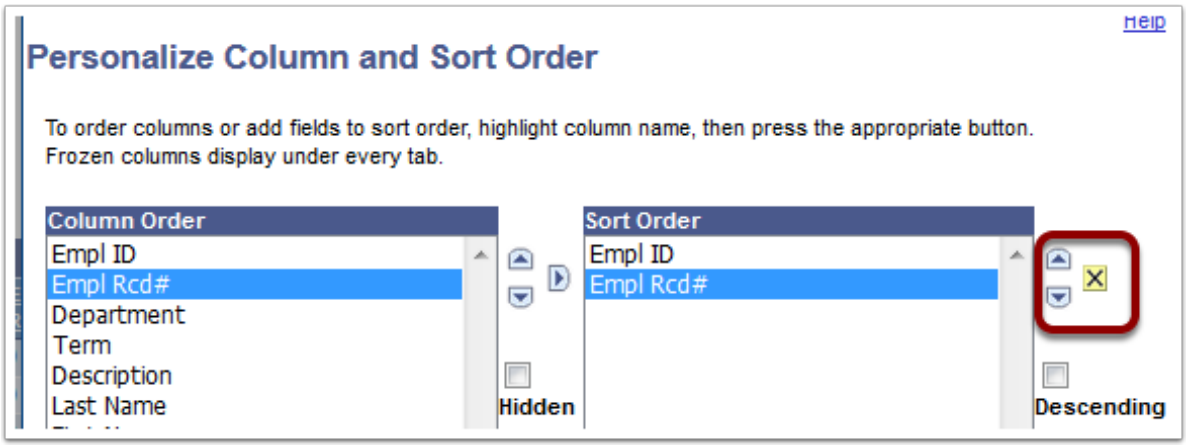
1. Click on a field in the **Column Order** box (e.g. Empl ID).
2. Use the **Up** and **Down** arrows between the two boxes to move the field to the left (up) or right (down) in the **Search Results** display.
3. Click the **Hidden** check box if there is a field you do not want displayed in the Search Result.
4. Clicking the **Frozen** check box will lock a field heading from allow a re-sort when output is displayed.



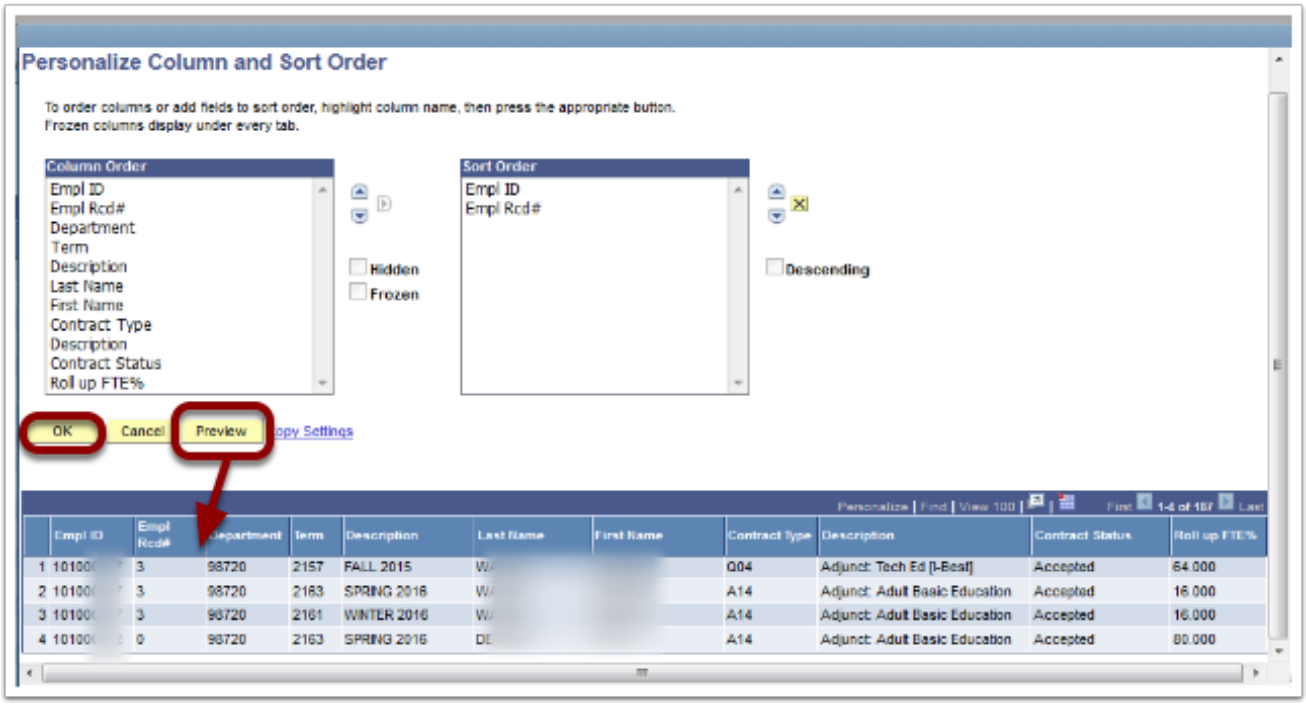
5. Click on a field in the **Column Order** box (e.g. Empl ID).
6. Use the **Right** arrow to copy the field to the **Sort Order** box.



7. To select secondary sort order criteria, select another field in the **Column Order** box (e.g. Empl Rcd#).
8. Use the **Right** arrow to copy the next field to the **Sort Order** box.



9. Use the **Up** and **Down** arrows to the right of the **Sort Order** box to change the primary and second fields used for sorting output in the **Search Results** display.
10. Click the '**Descending**' check box if there is a desire to sort the values in a particular field in descending rather than ascending order in the **Search Result**.
11. Clicking the '**X**' will remove a field from the **Sort Order** box.
12. Click **Preview** to see a sample of how the new Search Result will display.



13. Click **OK** to preserve the personalized column and sort order.

Alert: If the instruct was calculated and paid under one Employee Record Number, then the contract was recalculated under a different Empl Rcd Nbr, then two rows for the same contract will display and the FTE% will be proportionally split.

Add Instructor Assignment to Schedule of Class

Purpose: Use this document as a reference for how to add an instructor to the Instructor for Meeting Pattern section on the Meetings tab in Schedule of Class, review all class assignments for an instructor and make any necessary one time adjustments to the Weekly Contact Hours for a class. This is part of the Faculty Workload process steps.

Audience: Class Scheduling Staff

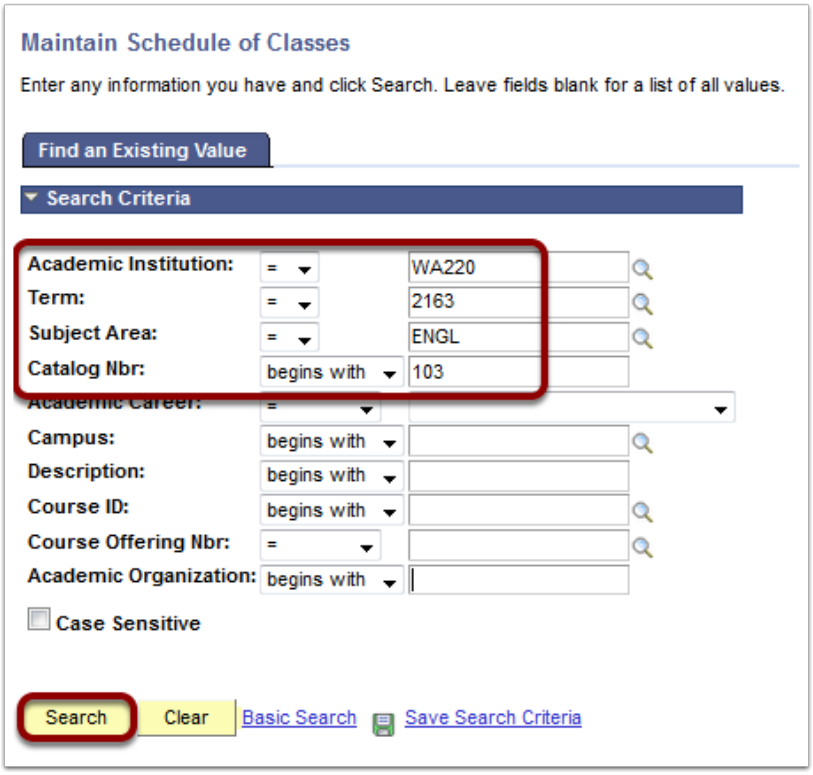
Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Main Menu > Curriculum Management > Schedule of Classes >Adjust Class Associations

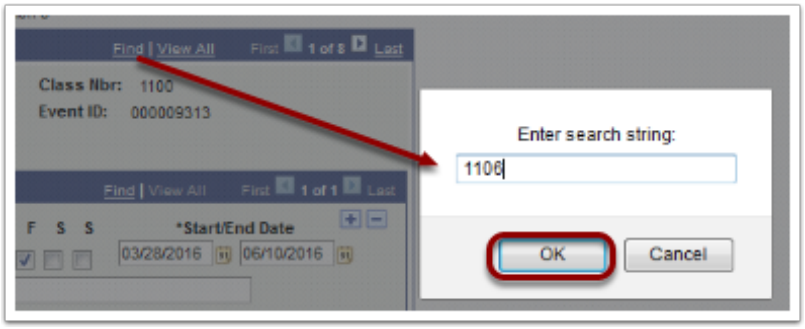
Main Menu > Curriculum Management > Instructor/Advisor Information > Instructor Term Workload

1. Search for an existing class in **Maintain Schedule of Classes** enter the following minimum search criteria:
   - **Academic Institution:** Enter the Institution or use the Look Up (e.g. WA220).
   - **Term:** Enter the Term or use the Look Up (e.g. 2163).
   - **Subject Area:** Enter the **Subject** or use the Look Up (e.g. ENGL).
   - **Catalog Nbr:** Enter the **Catalog Number** or use the Look Up (e.g. 101).

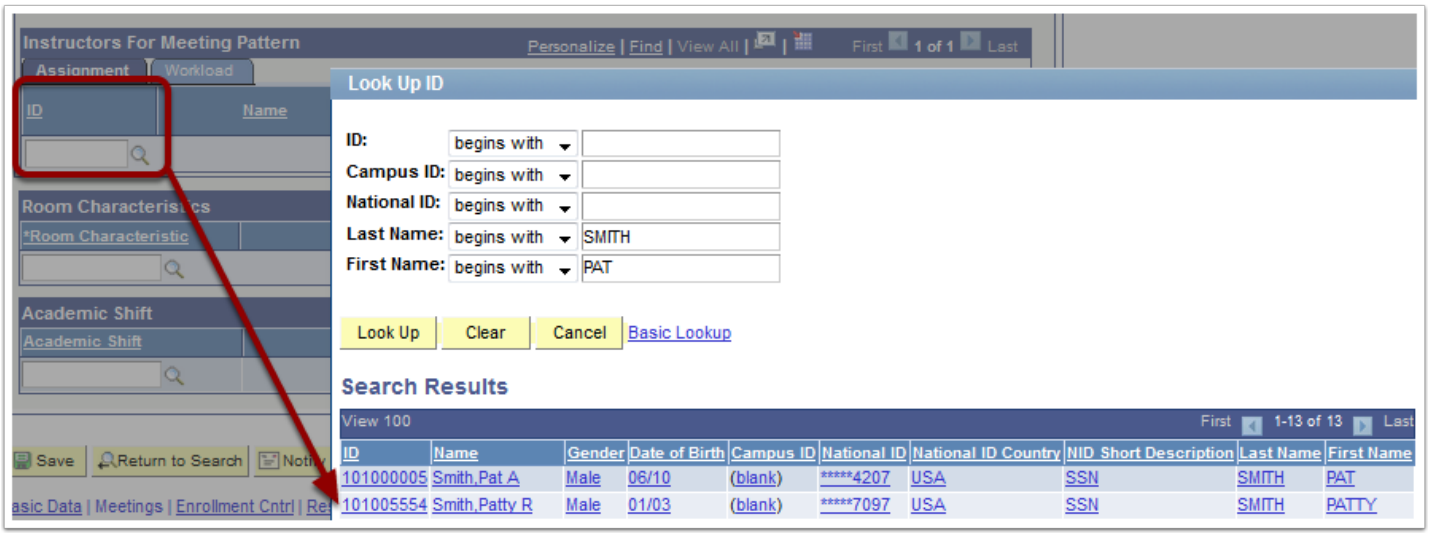


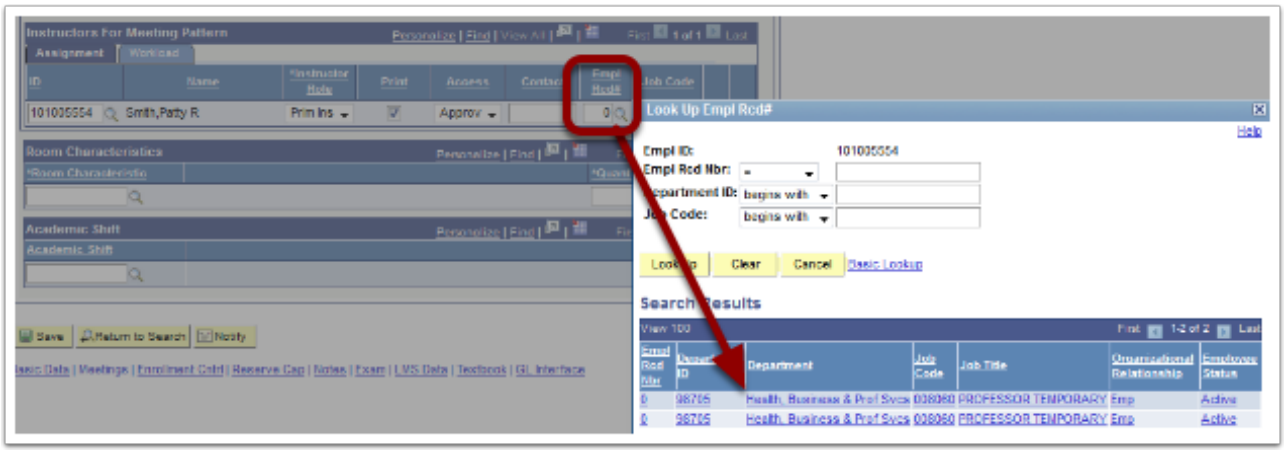
2. Click **Search**.
3. Click on the **Meetings** tab.
4. Click **Find** in the **Class Sections** ribbon.

5. At the **Enter Search String** pop-up window, enter the **Class Number**.
6. Click **OK**.



7. In the Instructors for **Meeting Pattern** section, **Assignment** Tab:
   - **ID:** Enter the Empl ID of the instructor or use the **Look Up**.
     - In **Look Up ID**, enter the **First/Last Name** and click **Look Up**.
     - Click the **ID** of the instructor to populate the **ID** field.
   - **Empl Rcd#:** Enter the **Empl Rcd Nbr** or use the **Look Up**.

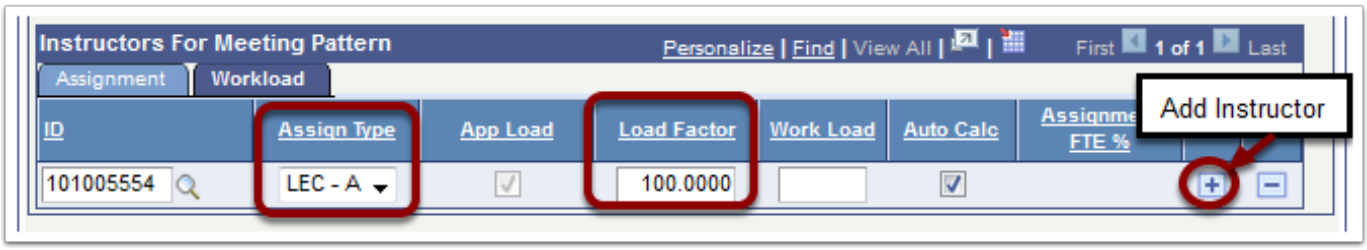




> **Note:** When using the Employee Record Number (**Empl Rcd#**) **Look Up** multiple lines may appear for the same job. These appear because there are more than one **Effective Dated** rows in **Job Data**. Since the **Schedule of Class** page is only seeking a number value, selecting any row with the correct **Empl Rcd#** will place the necessary value in the field.

8. In the Instructors for **Meeting Pattern** section, **Workload** Tab:
   - **Assign Type:** Click the drop-down arrow and scroll down through the available Assignment Types to select the appropriate value.
   - **Load Factor:** Enter the percent of load for the instructor. If the instructor is teaching the full load for the class, set the factor to 100.0000%. If the instructor is team teaching, each instructor would have a portion of the full load of the class, for example, sharing 50% / 50%. This factor can also be used to adjust the portion of load attributable to full time or moonlight, or can be used to reduce the payable load, such as limiting the contact hours for clinical to 2/3 of the total value of the class (or 66.6667% **Load Factor**). **Load Factor** is only used when it is configured as part of the formula for calculation and may not apply to all contract types at all colleges.
     - If multiple instructors are added to a **Meeting Pattern**, use the **Plus** (+) symbol to add additional rows. Complete steps 7 and 8 for each additional instructor.

> **Note:** While the Load Factor can adjust the number of contact hours for an individual instructor, thereby reducing or increasing pay and FTE%, if the contact hours for the class are incorrect and need adjustment for a single class refer to the Quick Reference Guide on [Adjusting FWL Contact Hours for a Class].



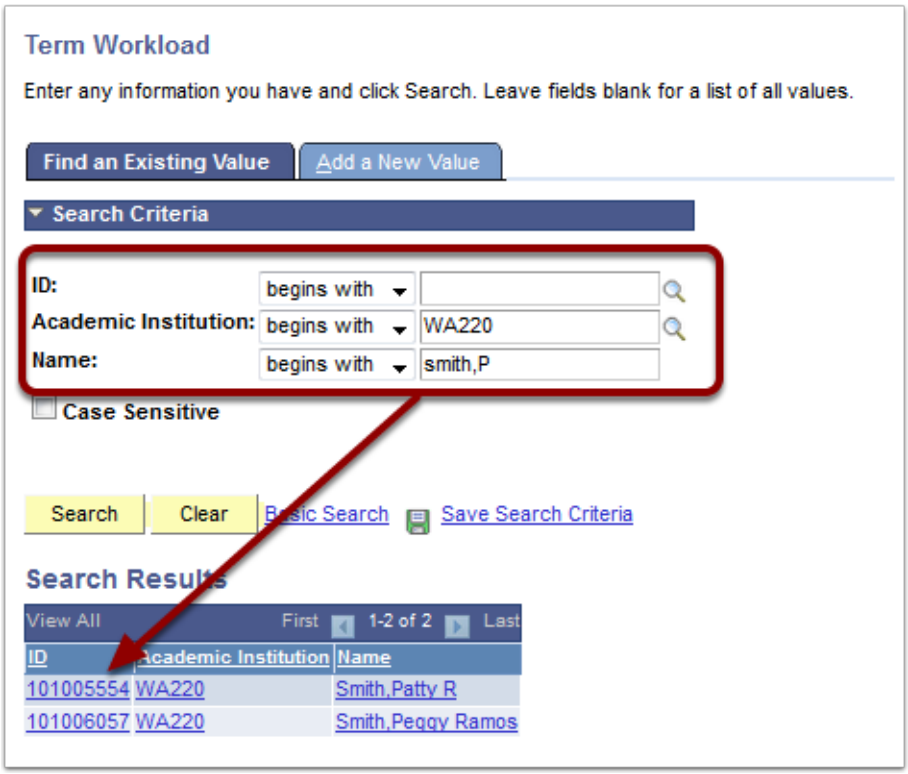
9. When all entries have been made for all classes in the course, click **Save**. There may be multiple warning messages related to other class numbers, even if they are not the class section you made the assignments on. By clicking save, you are saving all class sections for that course.

> **Warning:** If a class section (Class#) has multiple meeting patterns with the same instructor listed on more than one meeting pattern, only one **Assignment Type** will be picked up and calculated. FWL does not support differing payment methodology for multiple meeting patterns on the same class number.

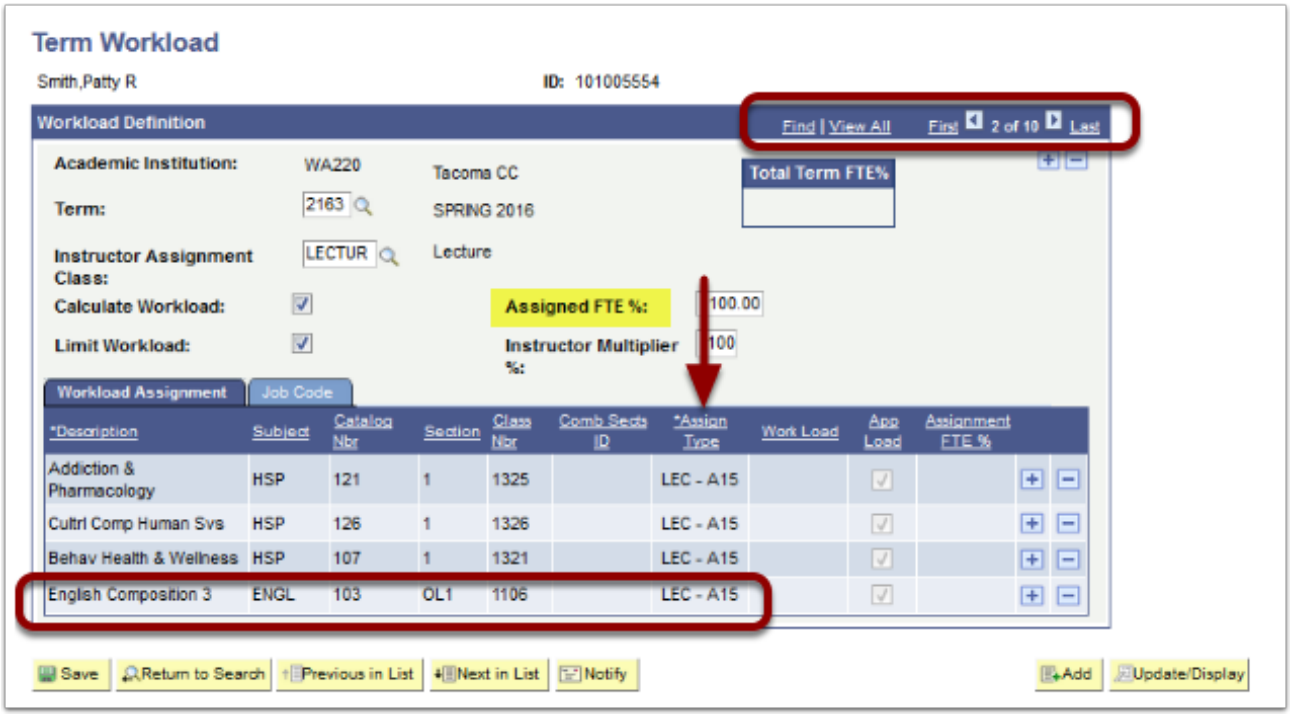
Viewing Class Assignments in Instructor Term Workload

After assigning an instructor to all intended classes the simpliest way to view at a glance an instructor's schedule of classes, the Assign Types and Empl Rcd Nbr (Job Code) selected for each class assignment. The Term Workload page displays all terms for which an instructor has classes or non-instructional assignments.

1. To view an instructor's workload navigate to the term workoad search page and enter the following:
   - **ID:** Enter the **Empl ID** of the instructor or use the **Look Up** to search by name for the ID.
   - **Academic Institution:** Enter the institution or use the **Look Up**.
   - **Name:** Enter a portion the instructor's name, search criteria is in *Last Name, First Name* format.
2. Click on the link for the desired record in the **Search Results** below.

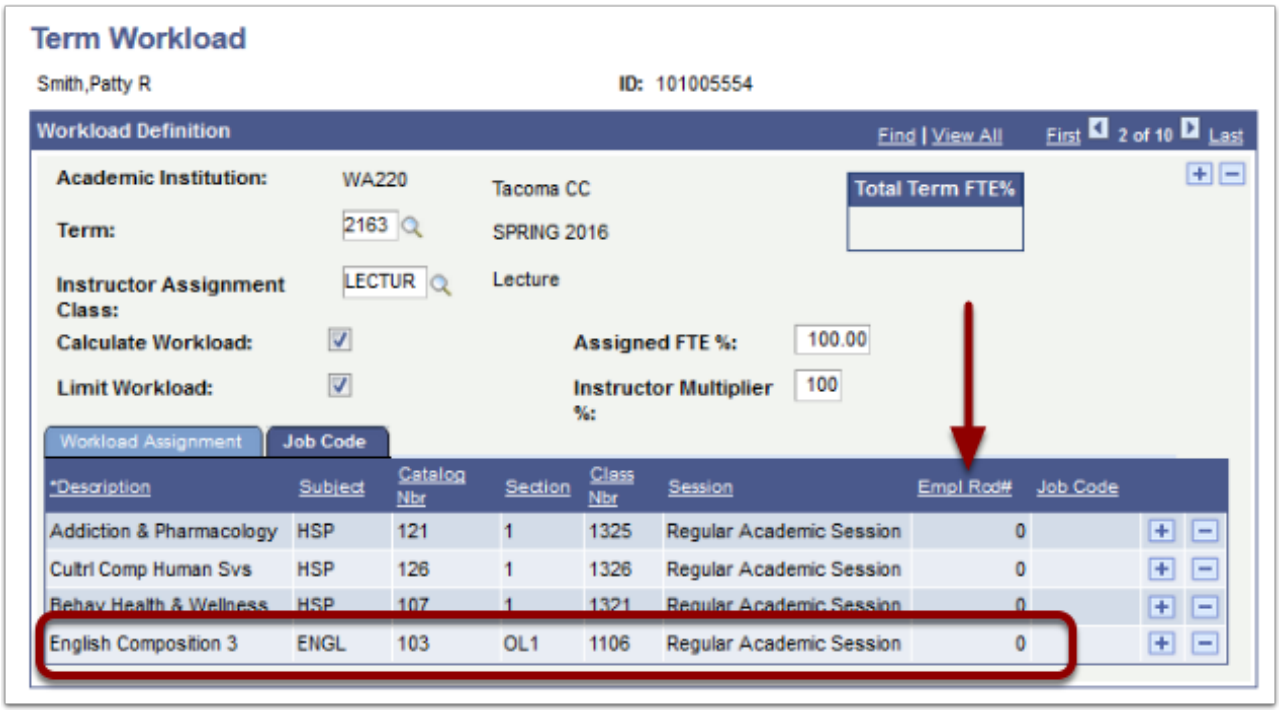


1. When multiple Terms of workload are displayed, to move to the correct Term:
   - Use the **left/right arrows** or the **First/Last links** to skip back and forth through the Term pages.
   - Use the **View All** link and scroll down to the correct Term.
   - Use the **Find** link and at the pop-up window, enter the Term (e.g. 2163).



2. The class that instructor was assigned to above displays on the **Workload Assignment** tab with the **Assign Type** used.
3. The Empl Rcd# selected for the instructor assignment display on the **Job Code** tab.

> ⚠ The **Assigned FTE %** value on this **Term Workload** page is NOT related to Faculty Workload. This value is part of the limited delivered Faculty Workload module within PeopleSoft, which has no relevance to the custom process developed for **ctcLink**.



> ℹ **Note:** The Instructor Term Workload page is used to add non-instructional/special assignments. Refer the the Quick Reference Guide on [Processing Non-Instructional Faculty Workload].

Adjusting FWL Contact Hours for a Class

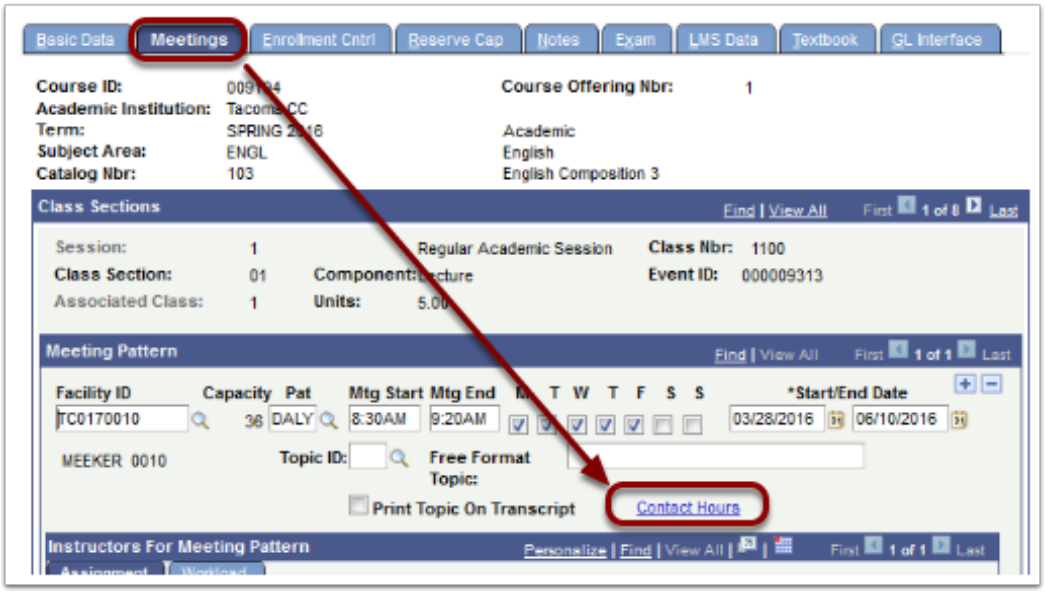
Purpose: Use this document as a reference for how to make adjustments to the Instructor Contact Hours for a single class for a specific Term.

Audience: Class Scheduling Staff

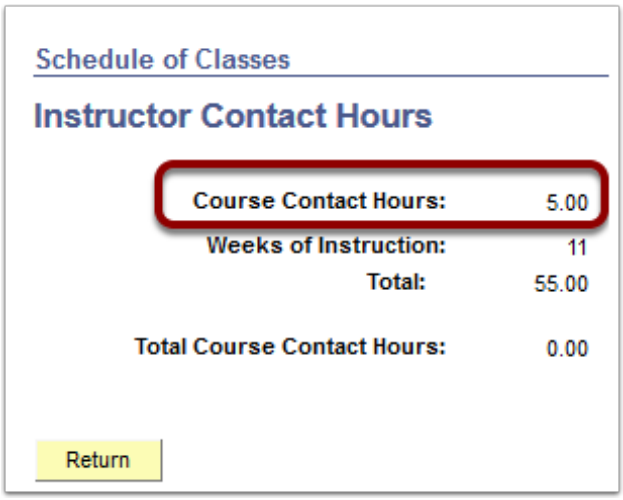
Navigation: Main Menu > Curriculum Management > Instructor/Advisor Information > Instructor Term Workload

If the contact hours established at the Course Catalog level and inherited in the Class are a factor used in the FWL calculation formula and the Weekly Contact Hours associated must vary for a single class number, the value can be adjust on the Adjust Class Associations page.

1. To view the Contact Hours associated with a class, in the **Schedule of Class Page**, on the **Meetings** tab click the **Contact Hours** link.



2. The Schedule of Classes - Instructor Contact Hours pop up window will display the Weekly Contact Hours as 'Course Contact Hours.'
3. To close this pop-up window and return to Schedule of Class, click **Return**.



Note: The **Weeks of Instruction** and **Total Hours** are not used in the Faculty Workload process, and may or may not align to the number of weeks used in your payment formula. These are PeopleSoft defaults and not part of the custom solution for faculty pay.

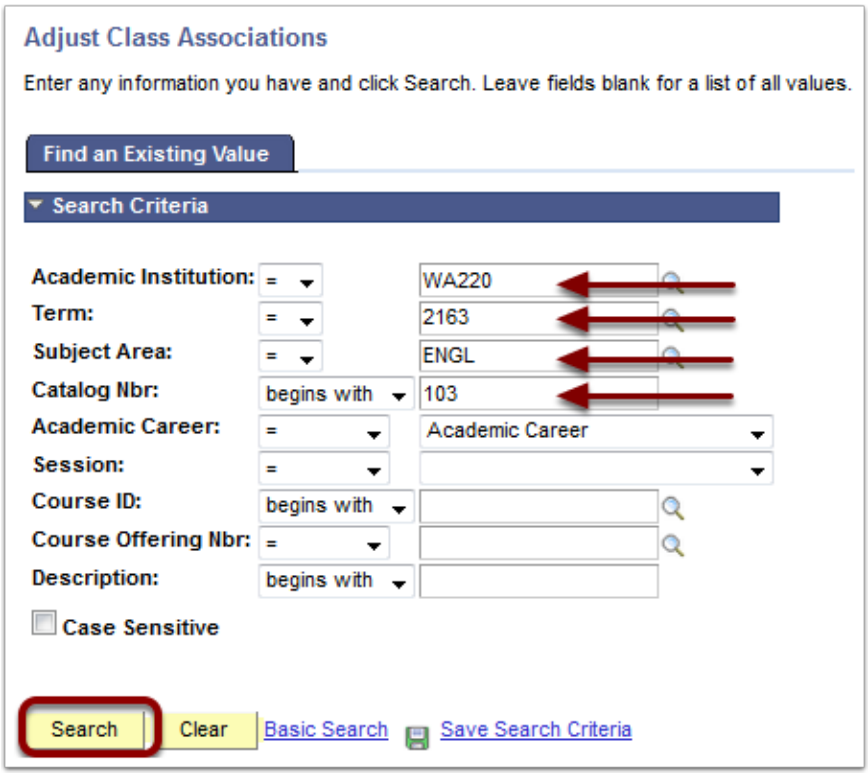
If you determine that the contact hours are not correct for a class, ***Best Practice*** is to contact the person at your college responsible for maintaining the Course Catalog and request an update or ensure that your payment practices and methods of instruction are in line with approved curriculum and State Board policy (see note below). Updating the catalog will ensure all future classes will be scheduled with the corrected number of contact hours. Once the correction is made to the catalog, the classes already scheduled will require adjustment at the class level, as these classes have already had their hours inherited from the catalog prior to the update. In cases of variable credit classes, individual class maintenance may be needed, without updates to the catalog to adjust the contact hours on an class-by-class basis. Refer to the Quick Reference Guide on Adjusting the Course Catalog Component for FWL for more information.

Note: Details on the State Board policy on instructor contact hours are found in Chapter 4 of the State Board Policy Manual.

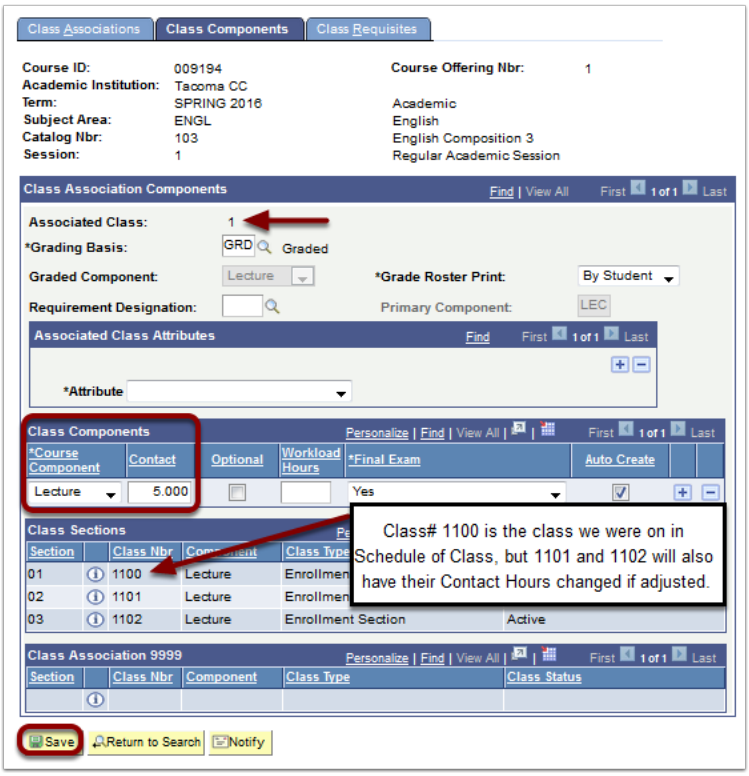
1. Navigate from the **Schedule of Classes** (SoC) page to the **Adjust Class Associations** page. The search criteria page will inherit the required search values from class if navigation is direct from SoC, otherwise enter the following in the search criteria:
   - **Academic Institution:** Enter the institution (e.g. WA220) or use the Look Up.
   - **Term:** Enter the term (e.g. 2163) or use the Look Up.
   - **Subject Area:** Enter the subject (e.g. ENGL) or use the Look Up.
   - **Catalog Nbr:** Enter the catalog number (e.g. 101), remember that in PeopleSoft catalog numbers do not begin with zero.

- **Academic Career:** (optional) Select either *Academic Career* or *Continuing Education* from the drop down list.
- **Course ID:** (optional) If the Course ID is known, enter this value and leave the Subject, Catalog Nbr and Career fields blank.

2. Click **Search**.



3. If more than one catalog entry matches the search criteria, the list of returned results will be displayed below the Search Criteria fields. Click the link for the relevant class to enter the page. If only one entry exists, the system will automatically open the page directly.
4. On the **Adjust Class Associations** page, click the **Class Components** tab.
5. In **Class Sections**, click **Find** to select and enter the Associated Class number, click the right/ left arrow to page through until you find the association group that contains the relevant class number or click **View All** and scroll down to find the desired class.



Warning: Classes are 'grouped' by **Associated Class** numbers. All classes that are grouped together by a shared **Associated Class** number will be impacted by adjusting the contact hours in this page. Class associations are typially used group multi-component (e.g. lecture/lab) combinations together, but a unique **Associated Class** number can isolate an individual class section for the purposes of adjusting contact hours.

6. Update the **Contact** hours value for the specific Component (e.g. Lecture) to adjust the Weekly Contact Hours, regardless of the hours entered on the **Course Catalog**.
7. When updates are completed, click **Save**.

Note: Once adjustments are made, the FWL Calculation Process must be run, either online (recalculation) or using the FWL Calculation Process in batch. Refer to the Quick Reference Guide on FWL Calculation Processing (batch) for more information on running this process.

Adjusting Course Catalog Components for FWL

Purpose: Use this document as a reference for how to make corrections or adjustments to the Course Catalog - Components tab in order to resolve issues with calculating Facutly Workload.

Audience: Class Scheduling Staff, Curriculum Managers

Navigation: Main Menu > Curriculum Management > Course Catalog

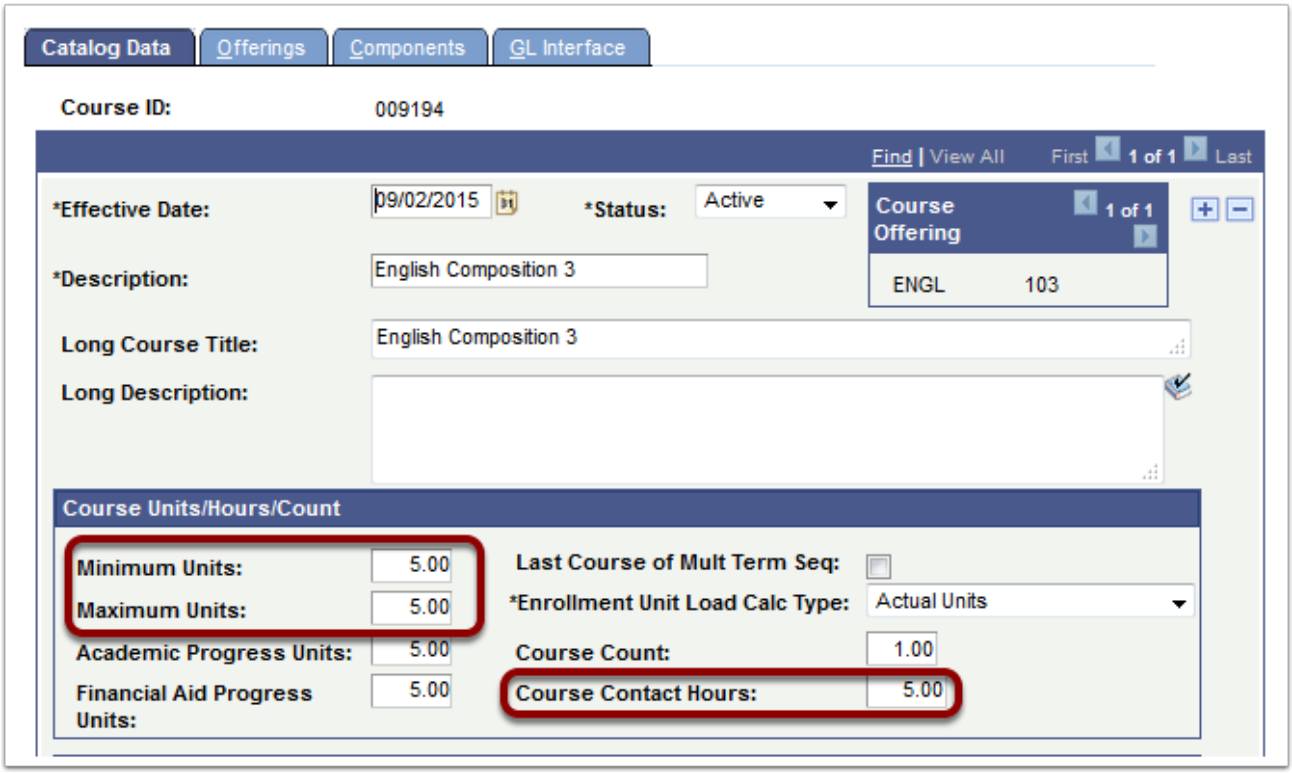
The Faculty Workload Calculation process will read the Instructor Contact Hours and Units from the Schedule of Class if that class was created in PeopleSoft from the Course Catalog. If a class was converted from the legacy system the class will not have the component hours stored in the system, therefore the FWL Calculation Process will use the Contact Hours and Units from the Course Catalog. Before making changes to the Course Catalog, it is important to understand the differences between the Catalog Data and Course Component tabs, one impacts class, while the other is related to Faculty Workload. There are 3 common reasons why the Course Catalog data may need to be adjusted for Faculty workload:

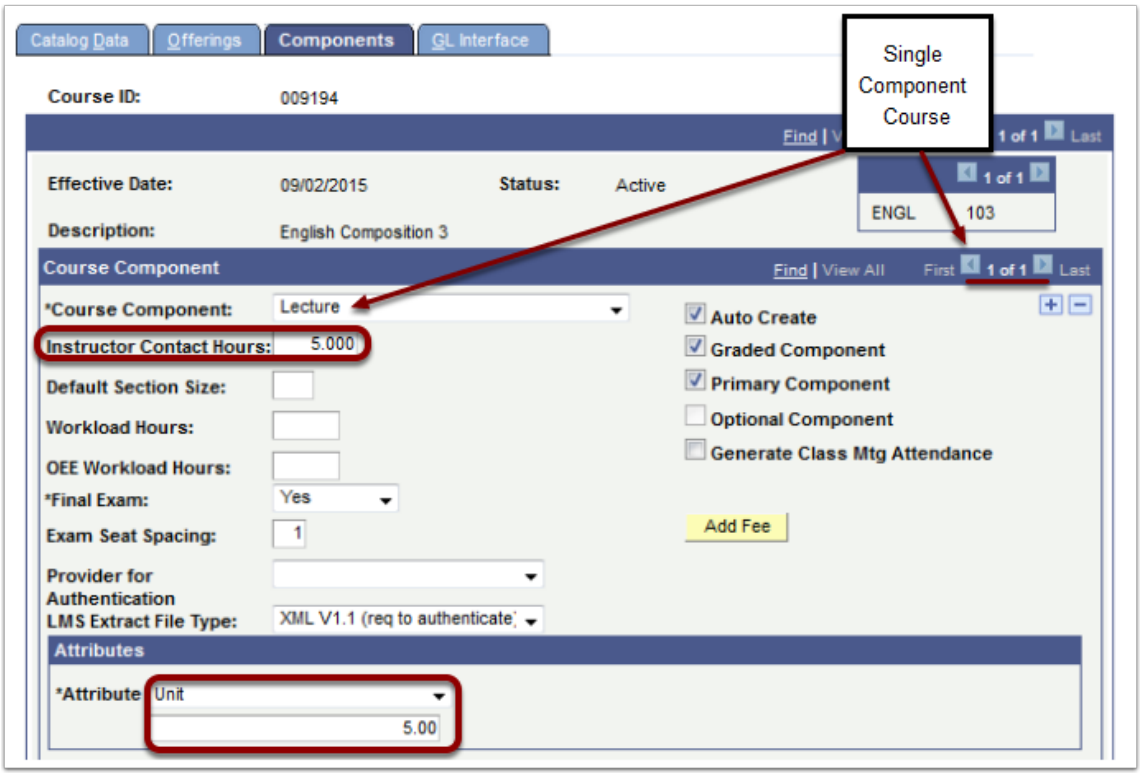
- Add a Missing Component
- Correct the Units (credits) for a Component
- Adjust the Instructor Contact Hours for a Component

Tip: Don't know what is meant by a component? While in PeopleSoft the word 'component' can mean a page or group of pages, in this instance a component is like the method of instruction. Common methods of instruction are Lecture, Lab, Clinical and Independent Study. PeopleSoft also supports a multitude of other components, though not all are currently explicitly defined under State Board Policy. Pictured below is the list of available components within the Course Catalog and highlighted are those in current practice, though only those mentioned above are part of the conversion process as the legacy system does not contain fields that track instructor contact hours for Practicum and Seminars separately, though they are defined in the collective bargaining agreements at a number of colleges.

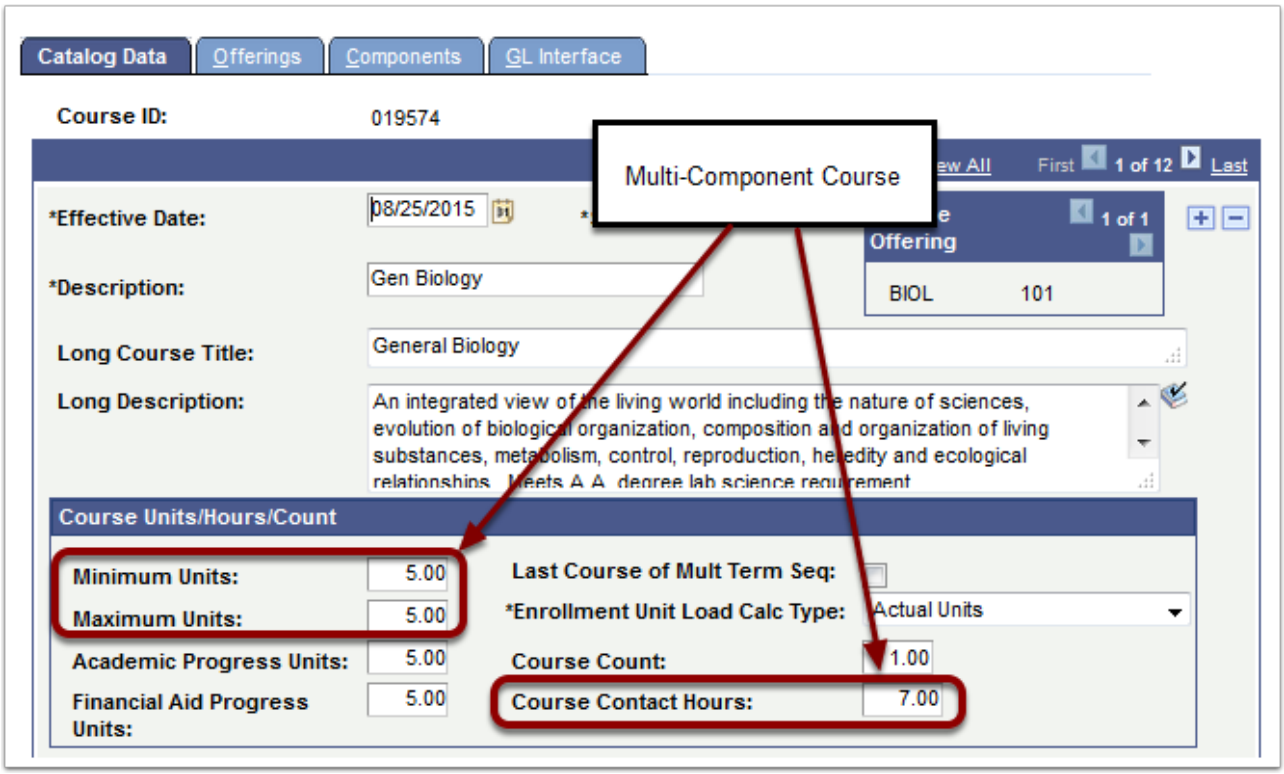
Understanding the Difference Between the Catalog Data and Component Tabs

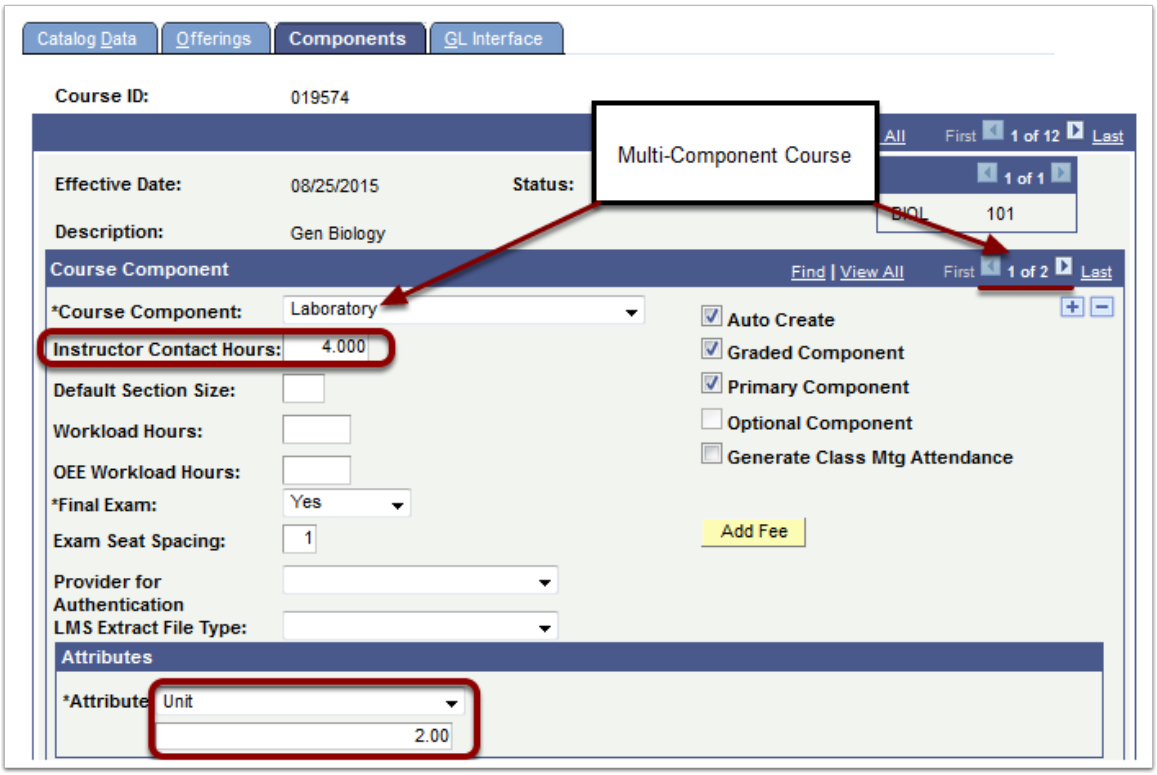
The Catalog Data tab, in the Course Units/Hours/Count section, contains the sum of all component Units and Instructor Contact Hours. The Minimum and Maximum Units at the total number of units (credits) associated with the full course. If a class is made up of only one component, such as Lecture, then the Units and Course Contact Hours will be the same total Units and Instructor Contact Hours on the Components tab.

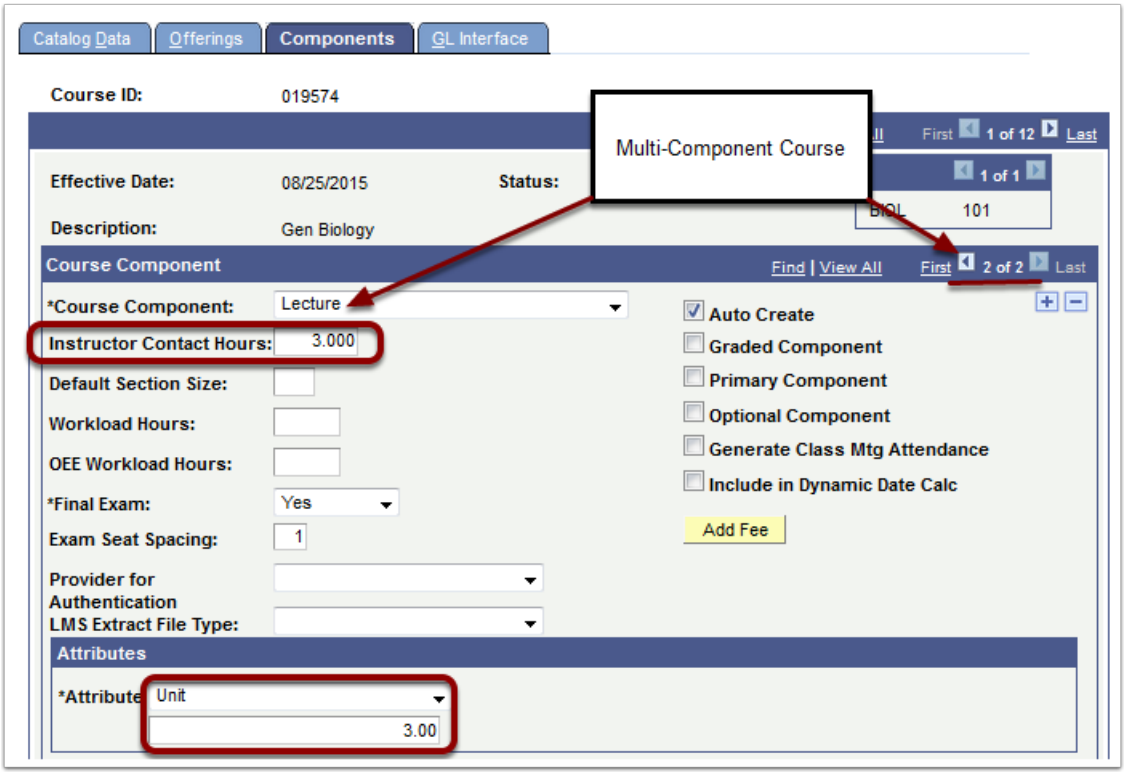




In PeopleSoft however; a course can be made up of multiple components, such as Lecture/Lab, Lecutre/Lab/Clinical, or Lecture/Practicum. These are referred to as 'Multi-Component Courses.' In those courses, each component on the Component tab will reflect a portion of the Units and Instructor Contact Hours that together equal the full value of the course.





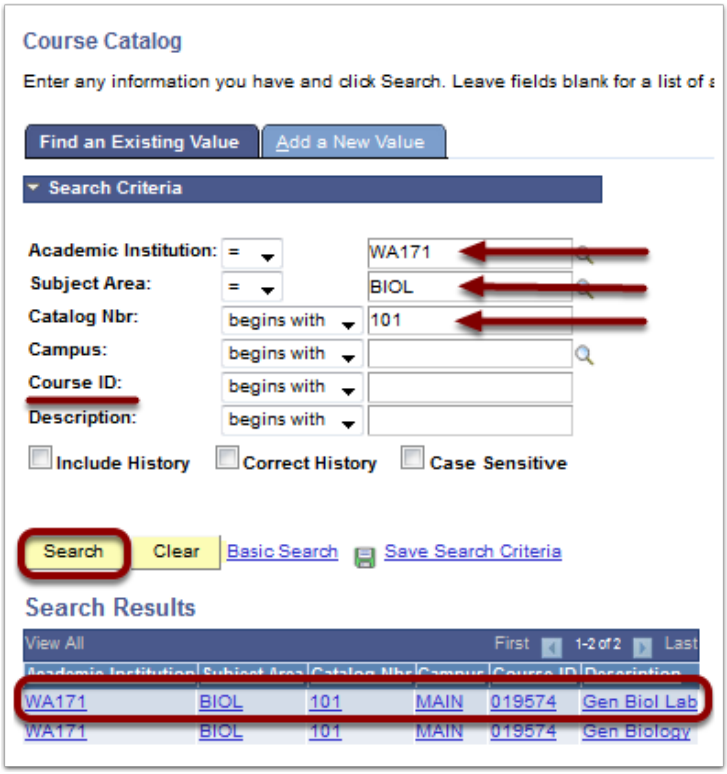


Using Search to View a Course in the Course Catalog

1. Navigate to the Course Catalog page.
2. At the Search Criteria enter the following:
   - **Academic Institution:** Enter the institution (e.g. WA171) or use the Look Up.

- **Subject Area:** Enter the subject (e.g. BIOL), or use the Look Up.
- **Catalog Nbr:** Enter the catalog number (e.g. 101). Reminder: In PeopleSoft catalog numbers cannot start with a zero.
- **Course ID:** (optional) If the Course ID is entered, the subject and catalog number can be left blank.

3. In the Search Results, click the link to the desired course to open the page.



Add a Missing Component

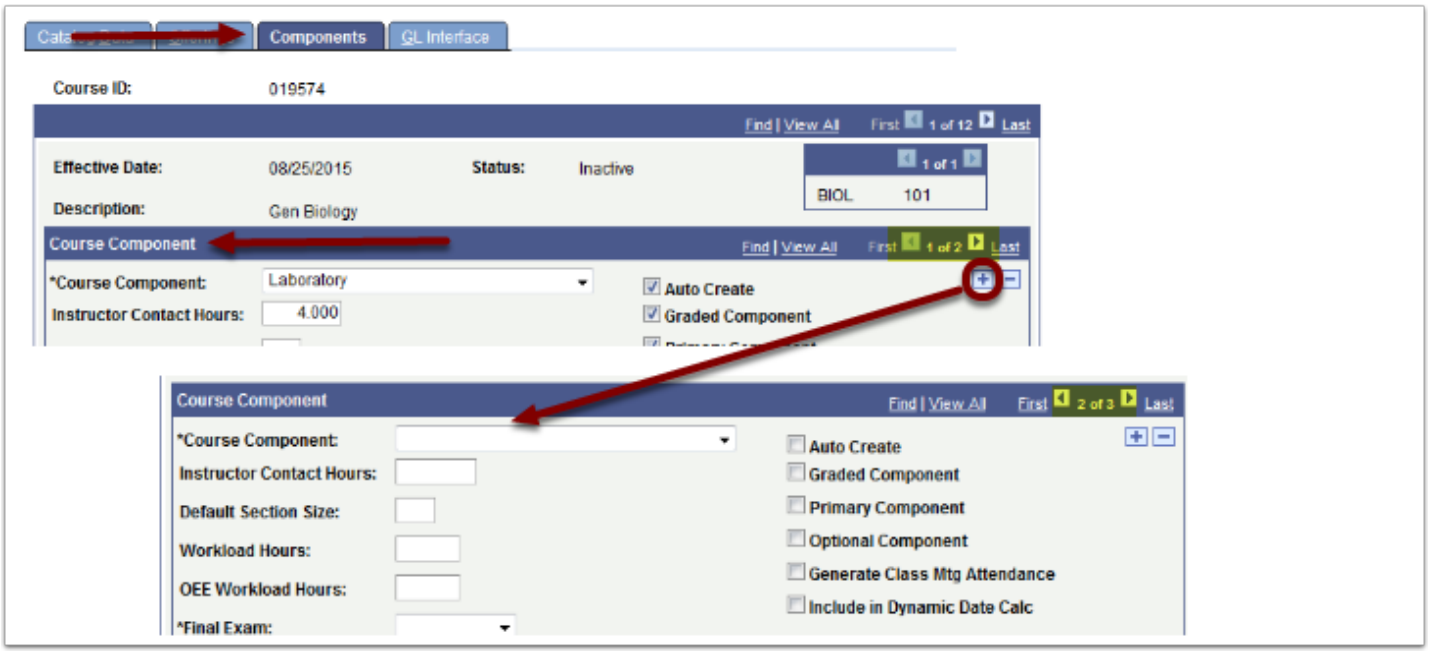
First you will need to determine if you are adding this new component to an existing course because it was missing to begin with or if you plan to have this new component available in the future to align with a planned change in the course.

- If you're just adding a missing component to an existing course, then you'll go directly to the Components tab to add it.
- If you're making a fundamental change to the course to add a new component, then you'll be creating a new Effective Dated course row* and then adding the component.

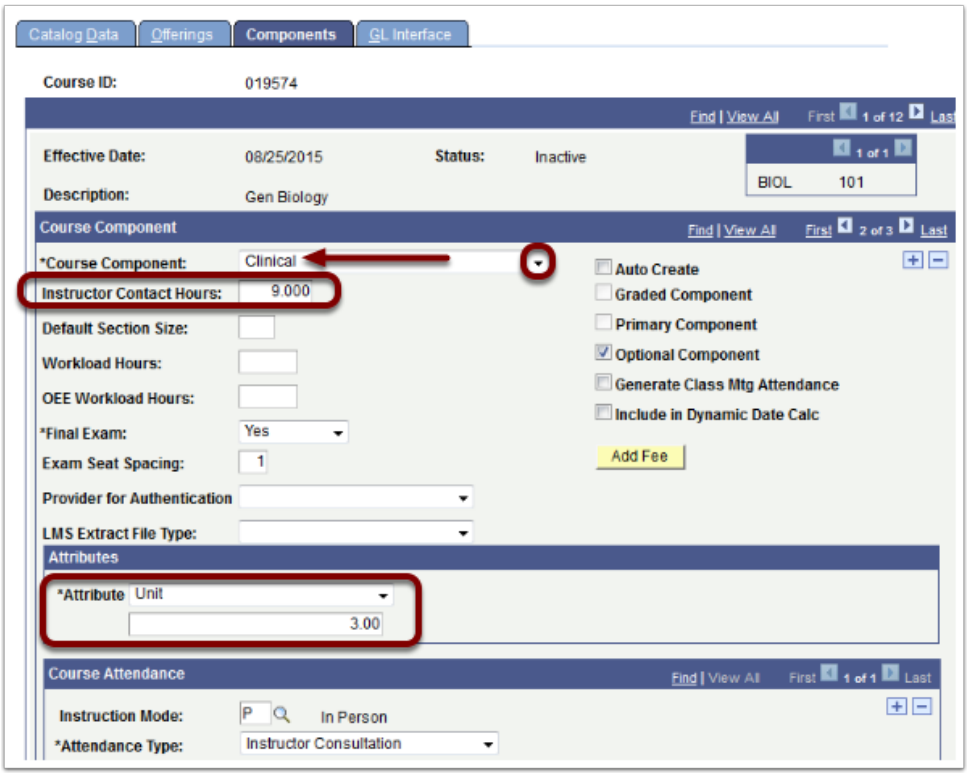
> ⚠ ***Warning:** Be very careful with making changes to components, ESPECIALLY if you're removing a component. Often times in an effort to 'clean up' the course catalog after *Go Live* a college will go back (using **Correct History**) and remove a component to prevent it from being offered in **Schedule of Class**. If a class has already been scheduled using that component (or converted to that component) and their pay

calculated, removing the component from the **Course Catalog** effectively shuts off FWL from seeing that class. While this could be a non-issue if their pay has already been processed, if there is any recalculation performed on that instructor for that term, their pay will rescind and cannot be brought back without adding that component back to the course and recalculating again.

1. Once you have selected the course to edit, if you are adding a new Effective Dated row
2. Click on the **Components** tab to add a missing component.
3. On the **Components** tab, in the Course Component section, click the Plus (+) symbol to add a new entry.

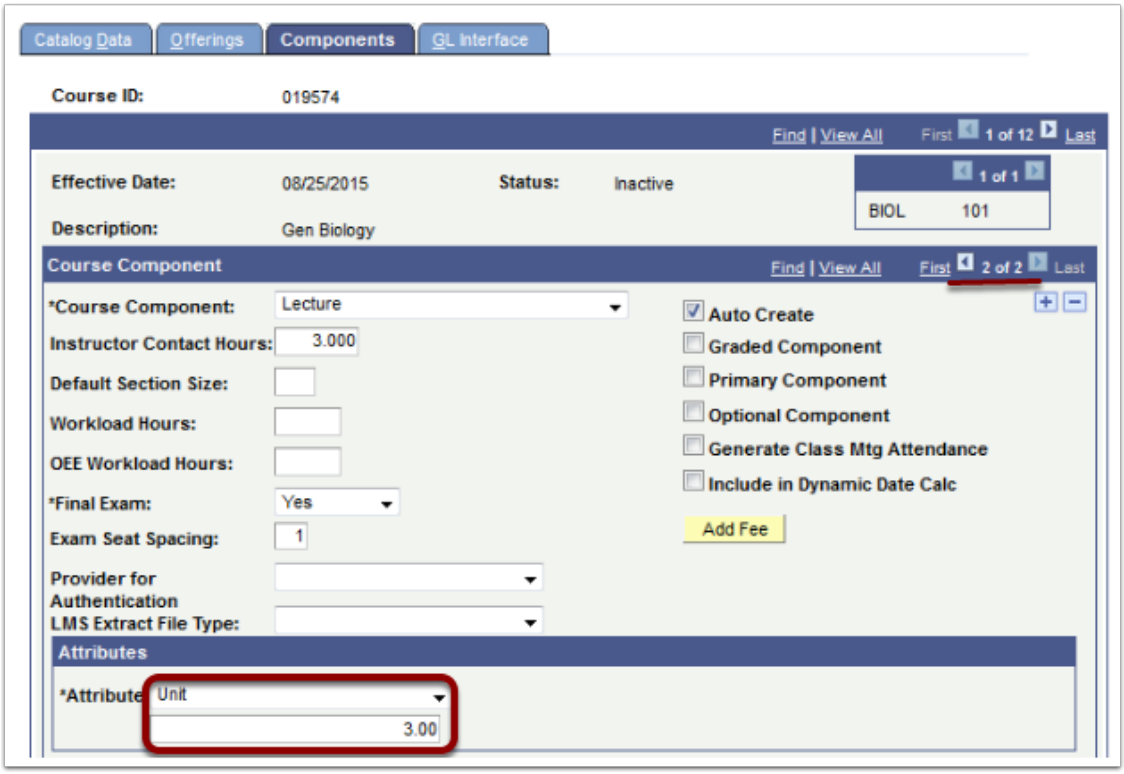


3. Click the **Course Component** drop down box to select the new compoent value to be added.
4. Add the **Instructor Contact Hours** at the proper ratio*.



Correcting the Units of a Component

To correct the Units of a Component



Adjust the Instructor Contact Hours for a Component

To adjust the Contact Hours of a Component

FWL Contract Generation (Batch)

Purpose: Use this document as a reference for how to use or add a Run Control to schedule the Faculty Workload Contract Generation Process. Executing the FWL Contract Process via the Process Scheduler (batch) generates the online (electronic) Contract, also referred to as an Appointment Letter at some colleges. The online Contract is accessible via a link on the Maintain Faculty Workload page. After a contract has gone through the approval process, it is ultimately visible to the instructor in their Faculty Center.

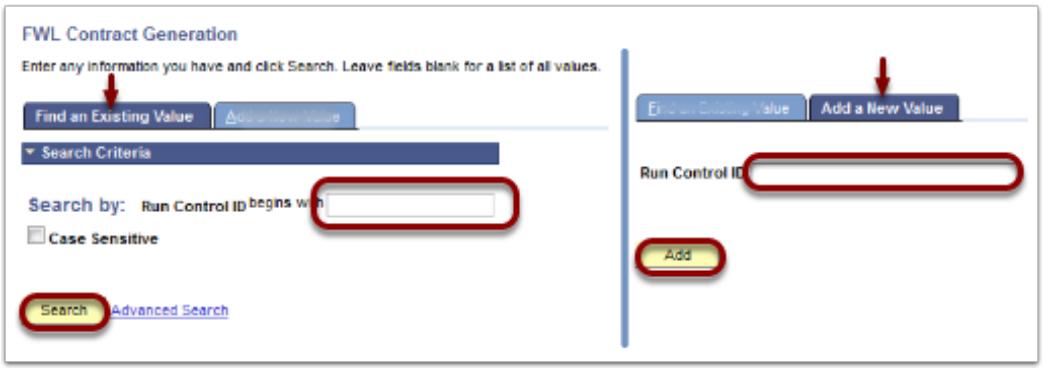
Audience: Class Scheduling Staff, HR\Payroll Staff

Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Contract Generation

Alert: Scheduling the FWL Contract Generation process requires the Empl ID of the Instructor. The Empl ID Look Up does not provide a name search feature. You MUST know the Empl ID of the instructor BEFORE attempting to enter this in the scheduling parameters!

Generating All Contracts

1. Navigate the FWL Contract Generation process.
2. Enter an existing Run Control ID and click Search, or add a new one on the Add a New Value tab and click Add.

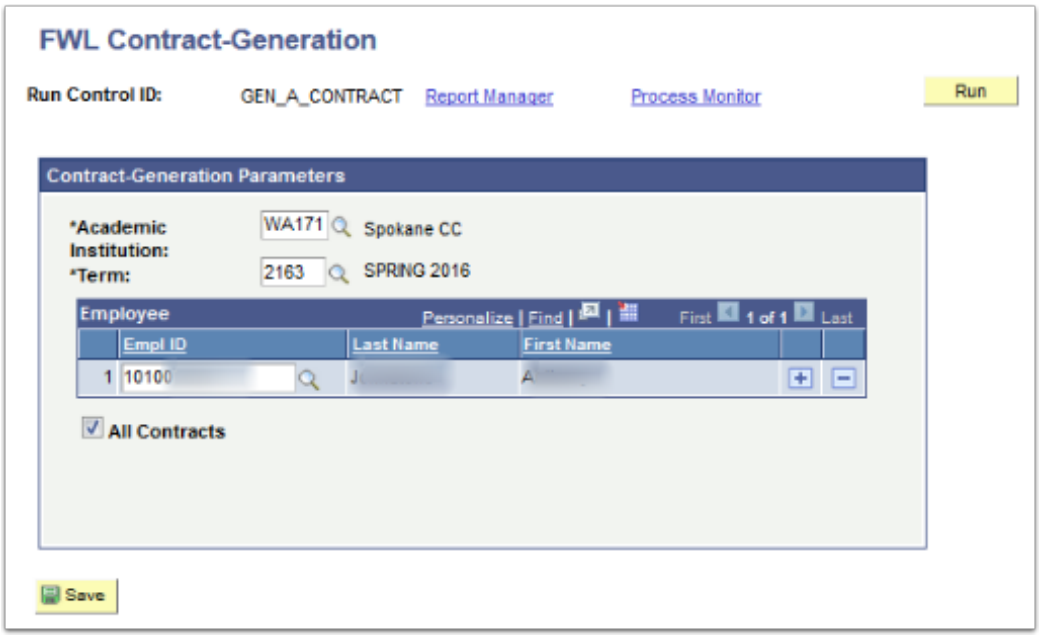


Tip: A Run Control ID is used to allow saving of scheduling parameters for a specific

process for later re-use. An ID can be used again with the same parameters or edited to change parameters. It is saved automatically when the Run button is clicked. Run Control IDs are user specific, which means:

- It is named by the user.
- Can only be seen by that user.
- Follows the user wherever they login from, regardless of browser or computer.

3. On the **Contract-Generation Parameters** page, enter the following:
   - **Academic Institution:** Enter the institution, or use the Look Up.
   - **Term:** Enter V or use the Look Up
   - **Empl ID:** Enter the instructor's Empl ID. (The Look Up will not help.)
   - **All Contracts Check Box:** The box is checked automatically. Leave it checked to generate all contracts for the Empl IDs listed.

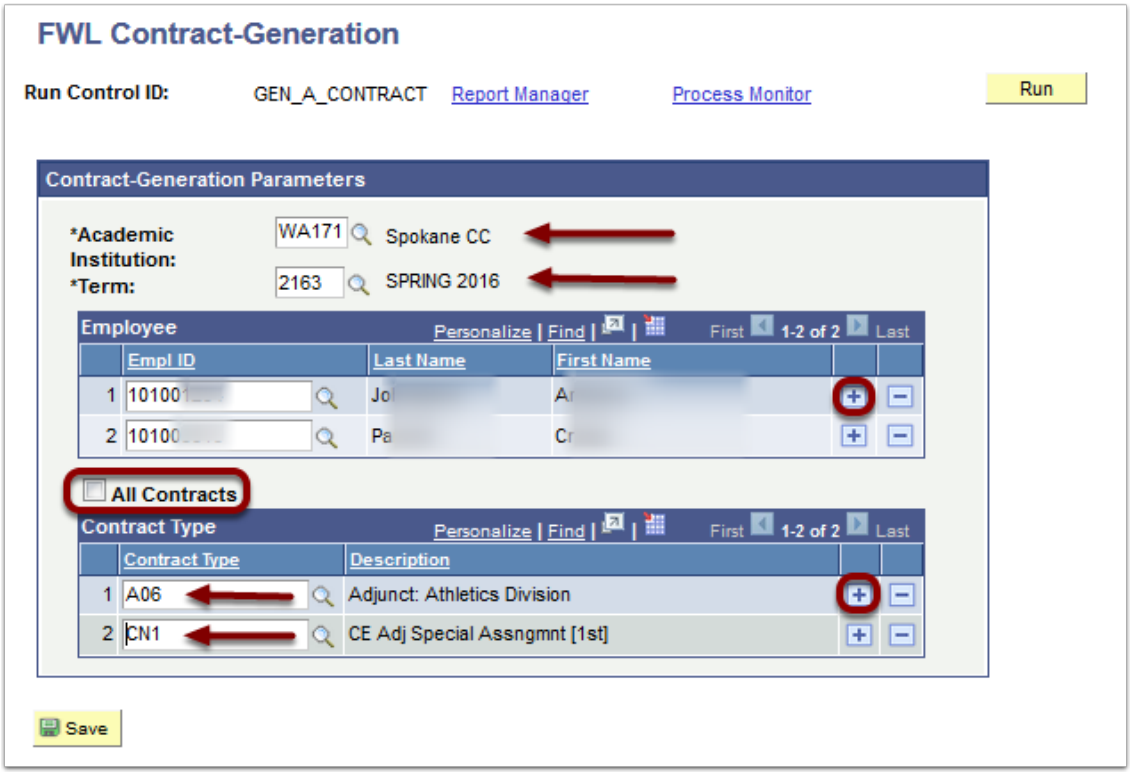


Warning: If you leave the Empl ID blank you will be launching the process to generate a contract for ALL Empl IDs in the system for which a Pay Line record exists. NOT RECOMMENDED unless the scheduler is assured that no contracts are 'part-way' through the calculation/validation process.

Generating a Single Contract

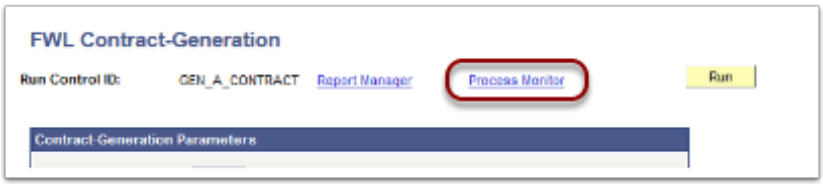
1. Navigate the **FWL Contract Generation** process.

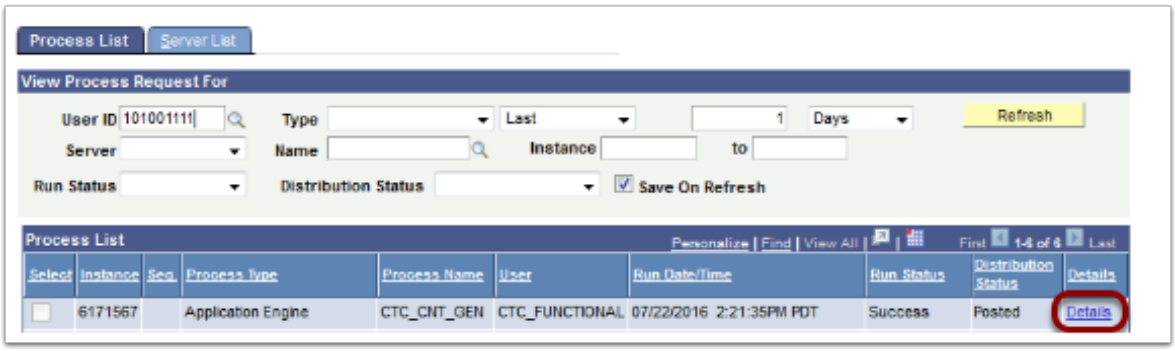
2. Enter an existing **Run Control ID** and click **Search**, or add a new one on the **Add a New Value** tab and click **Add**.
3. On the **Contract-Generation Parameters** page, enter the following:
   - **Academic Institution:** Enter the institution, or use the Look Up.
   - **Term:** Enter V or use the Look Up
   - **Empl ID:** Enter the instructor's Empl ID. (The Look Up will not help.)
   - **All Contracts Check Box:** The box is checked automatically. Uncheck to open the Contract Type section. Enter a specific Contract Type code (or multiple codes using the Plus (+) symbol) to generate specific contracts for the Empl IDs listed.

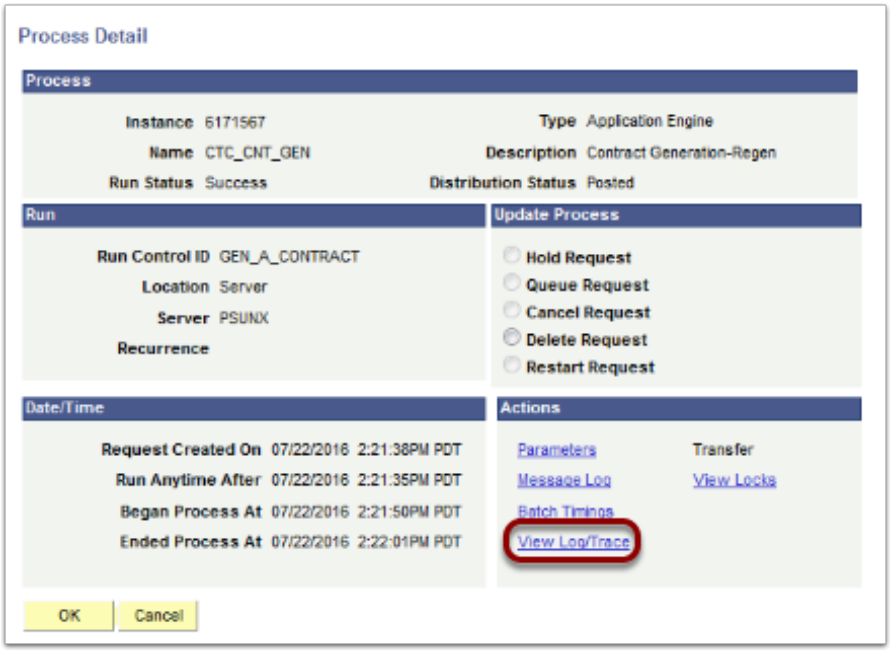


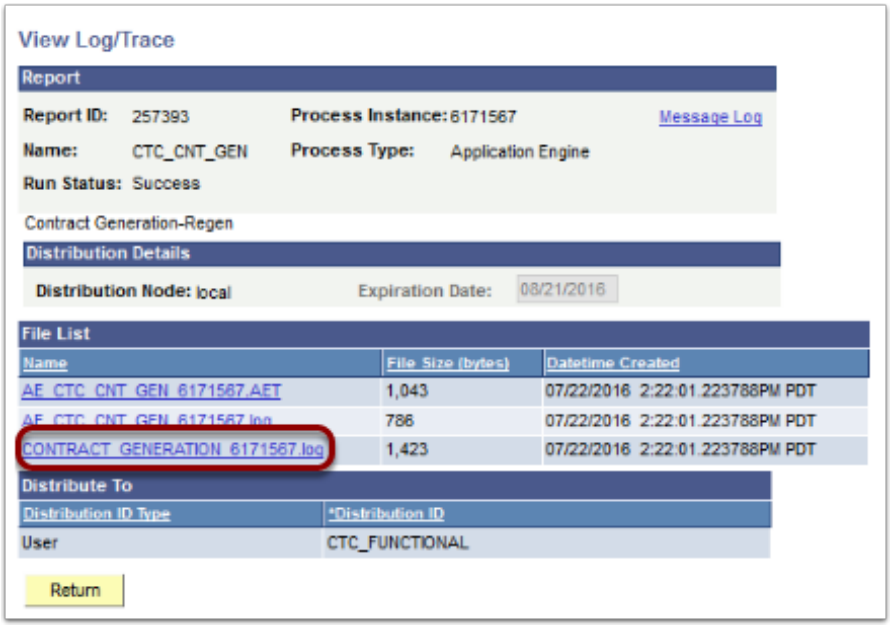
Understanding the FWL Contract Generation Log Files

1. After the process has been launched it can be monitored by following the **Process Monitor** link.
2. When the **Run Status** displays *Success* and the **Distribution Status** displays *Posted* you can following the **Details** link to access the log files. If your process runs to *No Success*, file an ERP Support ticket for assistance
3. In the **Process Detail** window, in the **Actions** section (lower right) click the **View Log/Trace** link.









4. The log file is divided into 4 sections:
   - **Section 1:** Displays the process instance, name and run date/time.
   - **Section 2:** Displays the scheduling parameters.

- **Section 3:** Displays **Empl ID**, **Contract Type**, **Status** (Generated, Regenerated, Not Generated) and a **Comment** if not generated explaining why.
- **Section 4:** Displays summary (count) of the contracts Generated and Regenerated.

```
*******************************************************************************
                              Process / Interface Log                          1
*******************************************************************************
 Process Instance    : 6171571            Operator ID          : CTC_FUNCTIONAL
 Process Name        : CTC_CNT_GEN        Run Date/Time        : 07/22/2016 14:59:26
*******************************************************************************
                               Run Control Parameter                           2
*******************************************************************************
 Run Control ID        (RUN_CNTL_ID)         : GEN_A_CONTRACT
 Academic Institution  (INSTITUTION)         : WA172
 Term                  (STRM)                : 2163
 All Contracts         (CTC_FWL_CNCTR)       : Y

*******************************************************************************
                     Contract Generation / Regeneration Details                3
*******************************************************************************
 Emplid       ContractType     Status           Comments
 101002116    CE1              Not Generated    Valid Contract already exists for Emplid
 101002116    EXC              Not Generated    Total contract amount is Zero
 101002116    F06              Not Generated    Total contract amount is Zero
 101002116    S19              Not Generated    Valid Contract already exists for Emplid
 101002116    Z19              Not Generated    Valid Contract already exists for Emplid
 101005008    F05              Not Generated    Total contract amount is Zero
 101005008    K05              Regenerated
 101005008    M05              Not Generated    Valid Contract already exists for Emplid
 101005008    MLB              Generated

*******************************************************************************
                                       Summary                                 4
*******************************************************************************
 Total number of Contracts Generated:1
 Total number of Contracts Regenerated:1
```

Note: Contracts will not generate if the total pay is $0. This includes FTE% Only contracts and exclusion contracts.

Sending Pay to Payroll via FWL Pay Line Extract

Purpose: Use this document as a reference for how to mark Pay Lines 'Ok to Pay' and run the automated process to extract all Pay Lines to send to Payroll.

Audience: HR\Payroll Staff

Navigations:

Campus Solutions (CS)

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → OTP Mass Assignment

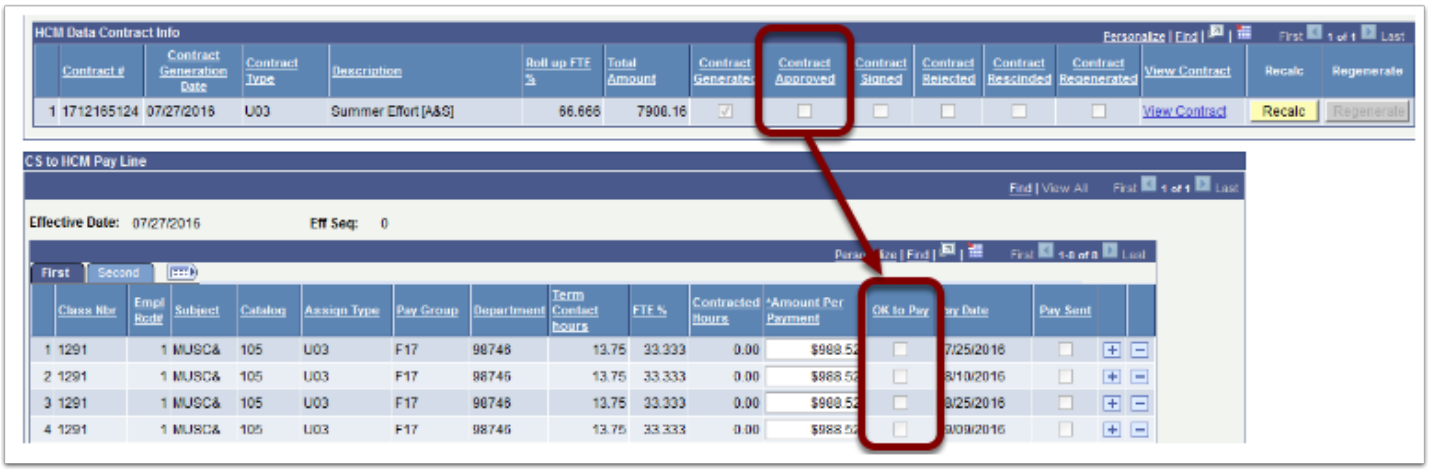
Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Pay Line Extract

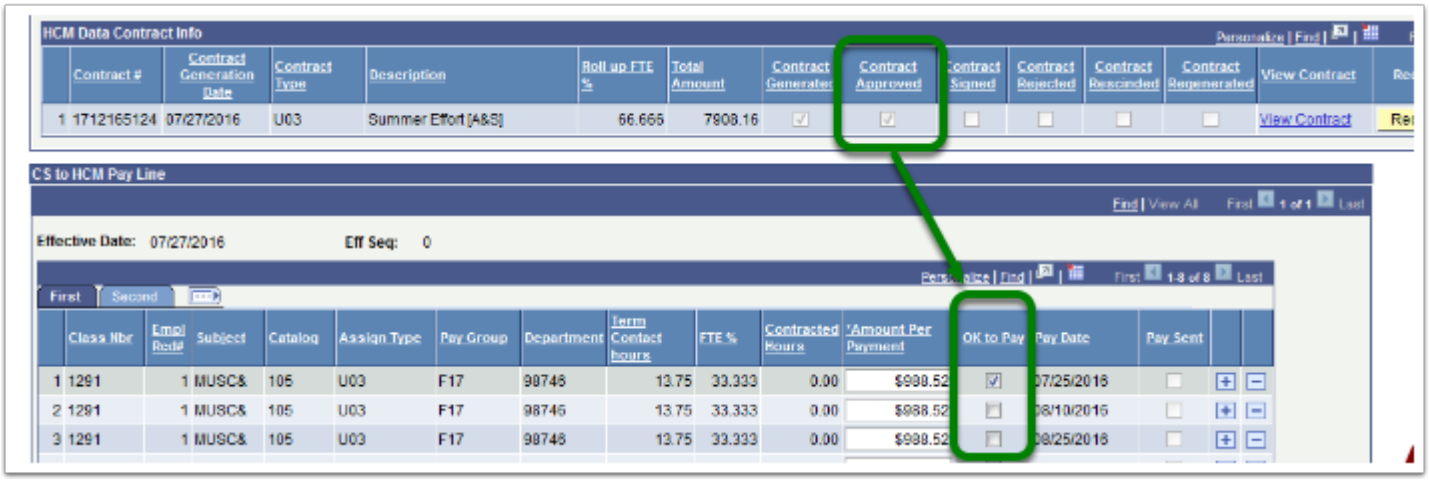
Human Capital Management (HCM)

Main Menu → Payroll for North America → CTC Custom → Paysheet Holding Update

Checking Ok to Pay from the Maintain Faculty Workload Page

1. If an online contract has not yet been approved, the **Ok to Pay** check box will not be open for editing and cannot be checked. This prevents pay from being sent over to payroll without an approved contract.
   - The contract does not need to be accepted by the instructor before payroll can be sent.
2. Once the online contract is approved, the **Ok to Pay** check box will be open for editing for those with the FWL_HRAdmin role and can be manually checked on the **Pay Line**.





3. While marking **Ok to Pay** can be done manually it is not efficient; therefore it is recommended that colleges run the **FWL OPT Mass Assignment** to check Ok to Pay for all **Pay Line** rows with a specific **Pay Date**.

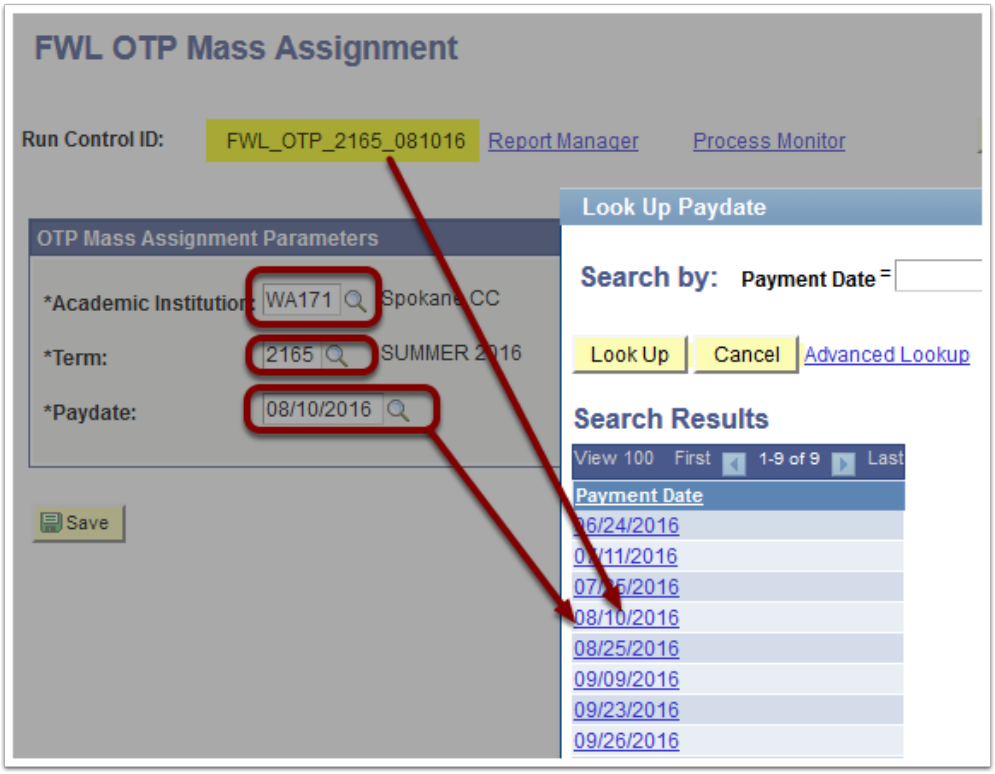
> **Note:** For information on how to manage negative Pay Lines refer to the Quick Reference Guide - Managing Negative Pay Lines.

Run the OTP (Ok to Pay) Mass Assignment Process

1. Navigate to the **FWL OTP Mass Assignment** process page.
2. At the **Run Control ID** search page, click search to use an existing ID.
3. Or click **Add a New Value** tab and enter a new **Run Control ID** (e.g. FWL_OTP_2165_081016) and click **Add.**
4. On the OTP Mass Assignment Parameters page, enter the following:
   - **Academic Institution:** Enter the institution or use the Look Up.
   - **Term:** Enter term value or use Look Up (e.g. 2165)

- **Paydate:** Use the Look Up and select a pay date from the specific term to mark 'Ok to Pay.'

5. Click Save.
6. Click Run.
7. At the **Process Scheduler Request** page, click the **OK** button.
8. Schedule the process again for the next Term/Pay Date combination.



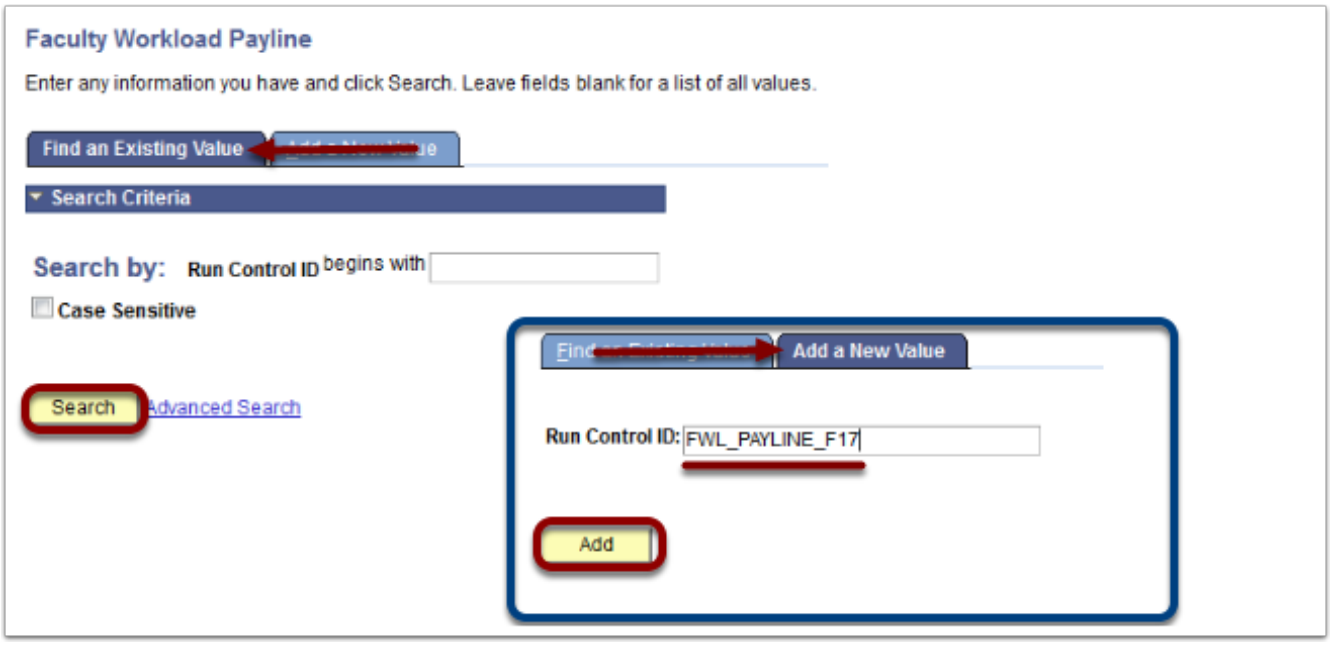
9. When all Term/Pay Date combinations have been scheduled, back on the Run Control Parameter page, click the **Process Monitor** link.
10. In the **Process Monitor**, when the **Run Status** = *Success* and the **Distribution Status** = *Posted*, click the **Details** link.
11. On the **Process Detail** page, click the **View Log/Trace** link.
12. On the **View Log/Trace** page, click the **OTP Mass Assignment** log file to see the total number of rows updated for each process run.

```
*******************************************************************************
                              Process / Interface Log
*******************************************************************************
 Process Instance    : 6171713           Operator ID          : CTC_FUNCTIONAL
 Process Name        : CTC_OTP_MASS      Run Date/Time        : 07/27/2016 15:37:23
*******************************************************************************
                               Run Control Parameter
*******************************************************************************
 Run Control ID        (RUN_CNTL_ID)        : FWL_OTP_2165_081016
 Academic Institution  (INSTITUTION)        : WA171
 Term                  (STRM)               : 2165
 Date of pay           (PAY_DT)             : 08/10/2016

*******************************************************************************
                                 OTP MASS ASSIGNMENT
*******************************************************************************
 Total number of Rows updated:125
```

Note: This process will need to be scheduled multiple times to mark pay dates '**Ok to Pay**' over several **Terms** and several **Pay Dates**. By saving the **Run Control ID** using a naming convention that marks the **Term** and **Pay Date**, it makes it easier to re-use the parameters each pay period and only create a *new* **Run Control ID** for each new **Term/ Pay Date** combination.

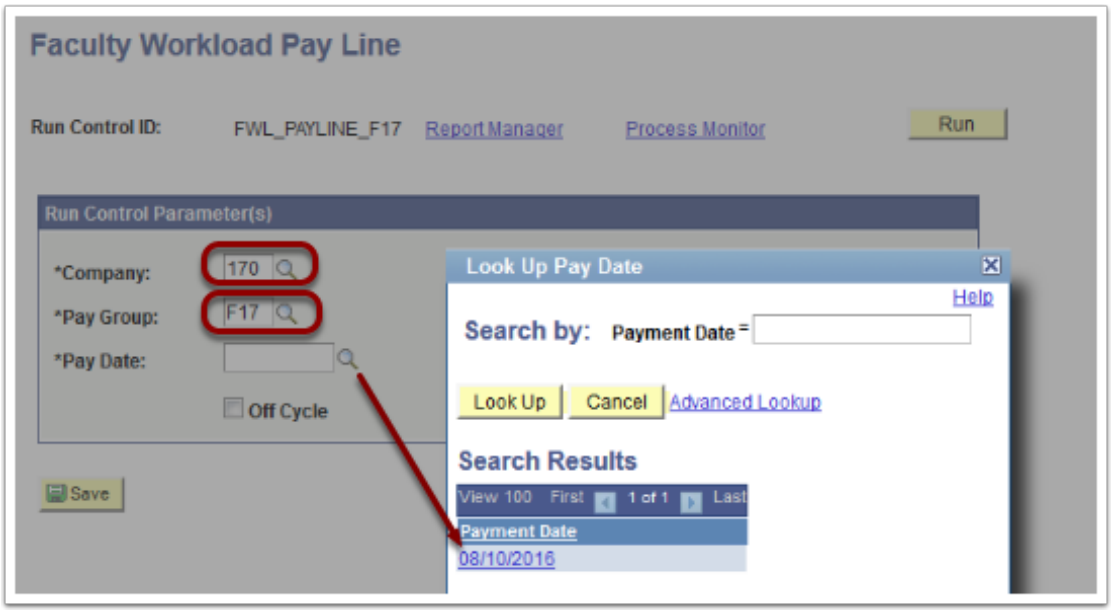
Run the FWL Pay Line Extract Process

1. Navigate to the **FWL Pay Line Extract** process page.
2. At the **Run Control ID** search page, click search to use an existing ID.
3. Or click **Add a New Value** tab and enter a new **Run Control ID** (e.g. FWL_PAYLINE_F17) and click **Add**.

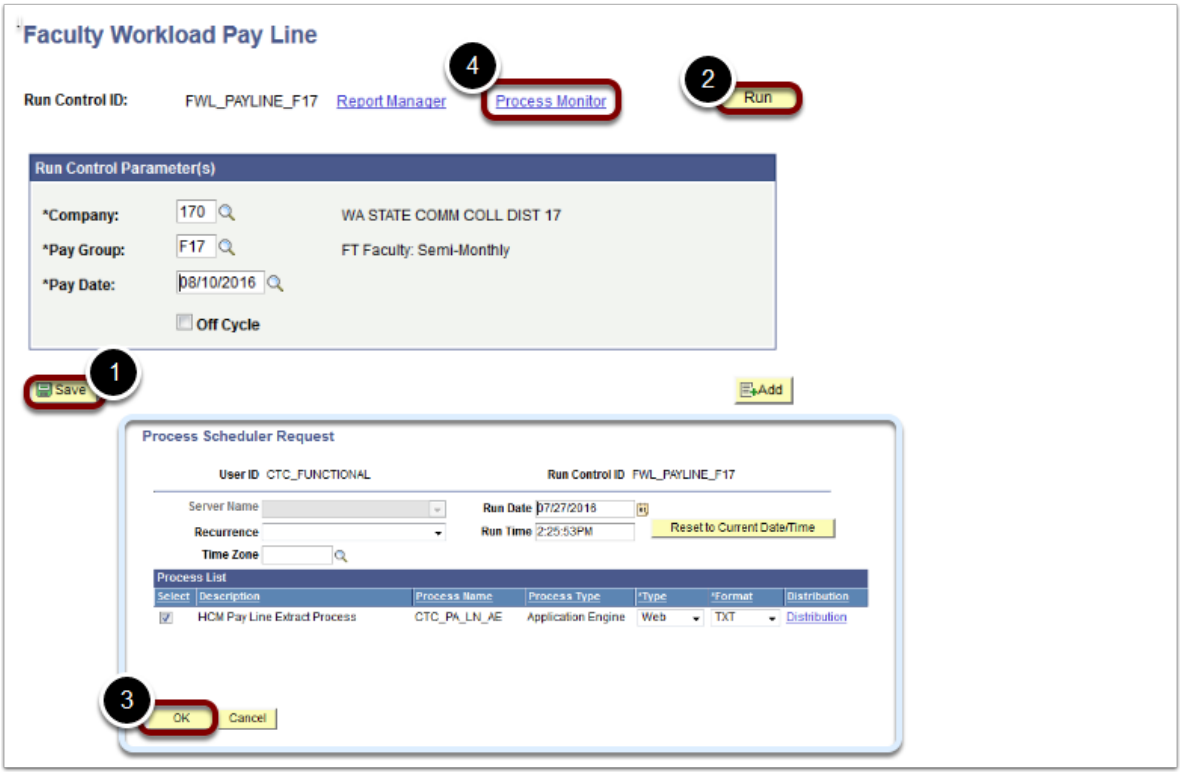


> **Note:** The payroll process is not term specific, therefore the process to extract pay from FWL does not use the **Term**. The **Pay Date** will always be the next upcoming payroll date for that selected **Pay Group**.

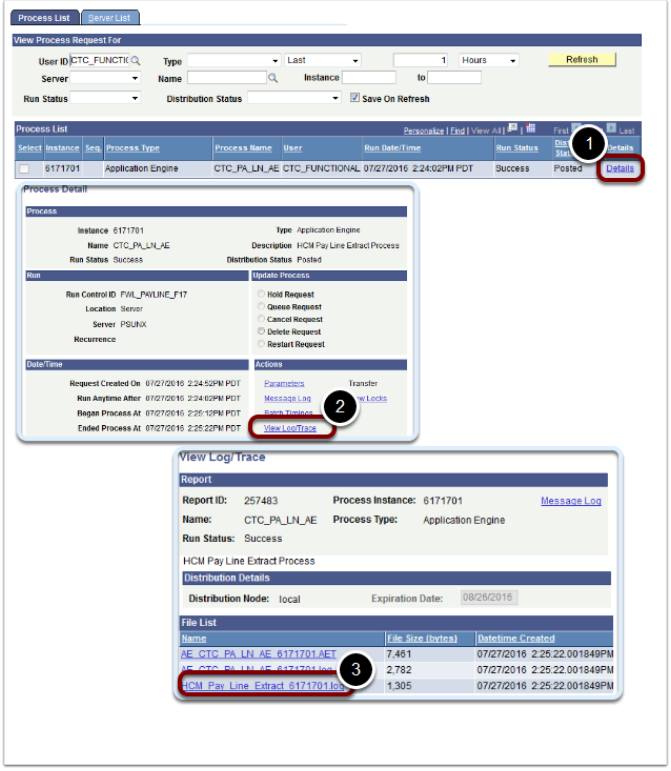
3. On the **Run Control Parameter** page enter the following:
   - **Company:** Enter the **Company Code** or use the Look Up.
   - **Pay Group:** Enter the **Pay Group** or use the Look Up. This process must be run, twice, once for EACH Pay Group (Full Time 'Fnn' and Part Time 'Pnn").
   - **Pay Date:** Use the Look Up to find the next payment date.
     - The Pay Date parameter allows the system to sweep through all Pay Lines marked Ok to Pay based on the individual class start and end date payment not yet sent to payroll with the selected Pay Date or earlier. The system also will pick up ANY negative Pay Lines marked Ok to Pay and not yet sent to payroll, regardless of Pay Date.
   - **Off Cycle:** Leave the **Off-Cycle** check box unchecked. Leaving this box unchecked will stop the off-cycle pay calendar entries from appearing in the Look Up Pay Date window.



4. Click **Save** to store the parameters against the **Run Control ID**.
5. Click **Run** to launch the process.
6. Click **OK** at the **Process Scheduler Request** page.
7. Back on the Run Control Parameter page, click the **Process Monitor** link.



8. In the **Process Monitor**, when the **Run Status** = *Success* and the **Distribution Status** = *Posted*, click the **Details** link.
9. On the **Process Detail** page, click the **View Log/Trace** link.
10. On the **View Log/Trace** page, click the **HCM Pay Line Extract** log file.



11. The log file will report the total number of rows from the FWL Pay Line that were picked up and sent to payroll.
12. The log file will also report the total number of rows added to the Pay Sheet Upload (PSHUP) staging table.

```
*************************************************************************
                          Process / Interface Log
*************************************************************************
 Process Instance    : 6171710          Operator ID         : CTC_FUNCTIONAL
 Process Name        : CTC_PA_LN_AE     Run Date/Time       : 07/27/2016 15:13:47
*************************************************************************
                           Run Control Parameter
*************************************************************************
 Run Control ID       (RUN_CNTL_ID)        : FWL_PAYLINE_F17
 Company              (COMPANY)            : 170
 Pay Group            (PAYGROUP)           : F17
 Payment Date         (PAYMENT_DATE)       : 08/10/2016
 Off Cycle ?          (OFF_CYCLE)          : N

*************************************************************************
                      Total number of processed rows : 2
*************************************************************************
*************************************************************************
                   Total number of rows loaded to PSHUP : 1
*************************************************************************
```

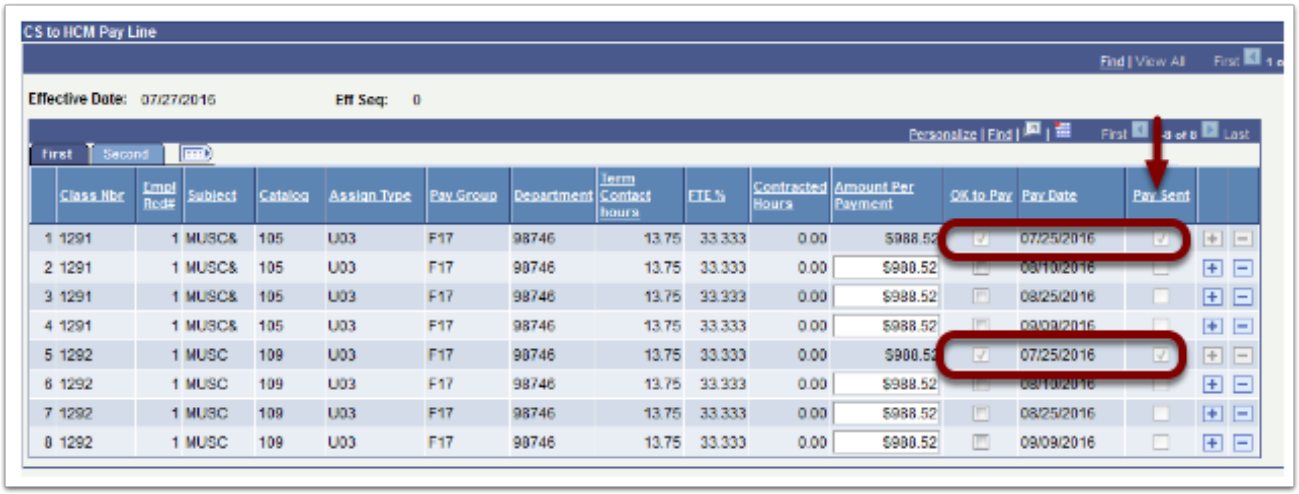
Note: The two counts on the log file will rarely match each other. This is because

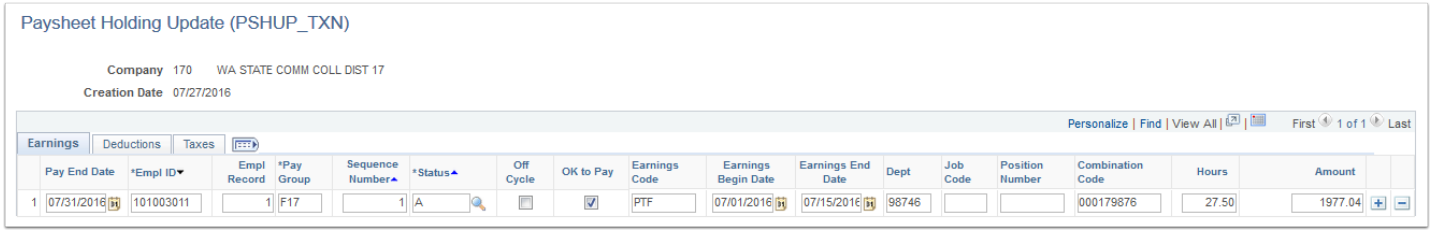
entries on the Pay Line will be summarized into a single row in the Pay Sheet Upload staging table if the Pay Period Begin\End Date and Earn Code are the same for an Empl ID and Empl Rcd Nbr.

In the page sampel below the 2 Pay Line rows (noted in the log file), resulted in 1 PSHUP table entry.

13. Once a Pay Line has been extracted to post to the Pay Sheet Upload (PSHUP) staging table that Pay Line row will be marked in the Pay Sent check box.

Note: the payline will be sent each row based onn the start and end date of a class.





Handling Late Hires in FWL

Purpose: Use this document as a reference for how to add an instructor assignment in the **Schedule of Class** when their hire date is **AFTER** the start date of the term. In that situation, the employee's job record is visible in **Maintain Faculty Workload**, but not accessible in the **Schedule of Class** for the terms with a start date before their hire date.

Audience: Class Scheduling Staff, HR\Payroll Staff

Navigation: Main Menu → Curriculum Management → Instructor/Advisor Information → Instructor/Advisor Table

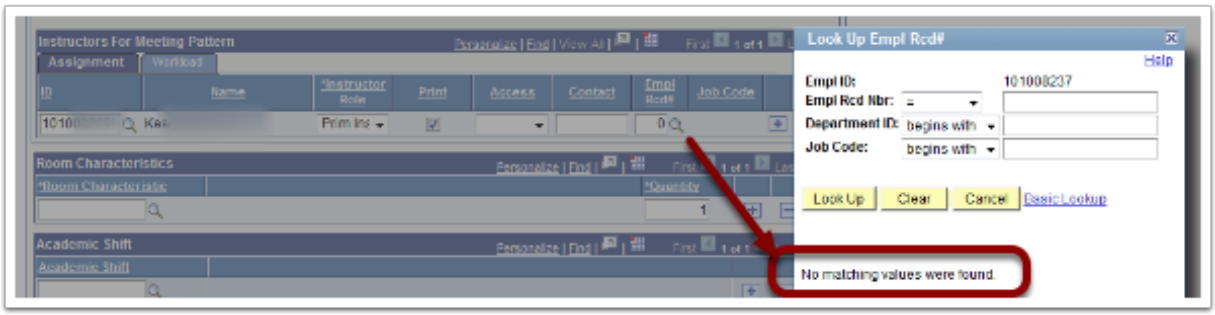
Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Note: New hires still require an entry in the Instructor/Advisor table before being processed in Faculty Workload. Refer the the Quick Reference Guide on Adding an Instructor to the Instructor/Advisor Table if you need help.

Adding a Newly Hired Instructor in Schedule of Class

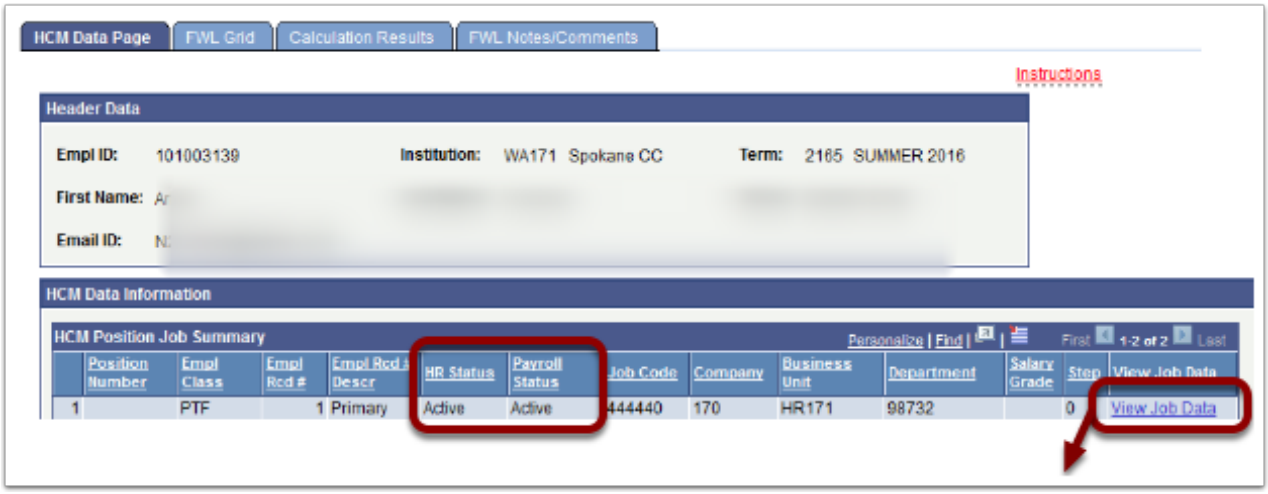
1. In **Schedule of Class**, use the search feature to open the desired class and click on the **Meetings** tab.
2. In the **Instructors for Meeting Pattern** section, on the **Assignment** Tab, enter the **Empl ID** of the instructor or use the Look Up to search by name.
3. Also on the **Assignment** tab, leave the **Empl Rcd#** at zero, the system default.
   - Since the **Job Data** record hire date is after the Term Start Date, the **Empl Rcd#** Look Up will return no results, this can be updated once in **Maintain Faculty Workload**.
4. Click the **Workload** Tab.



> **Note:** Not sure how to run the FWL Calculation Process to load the FWL Grid? Refer to the Quick Reference Guide - FWL Calculation Process (Batch).

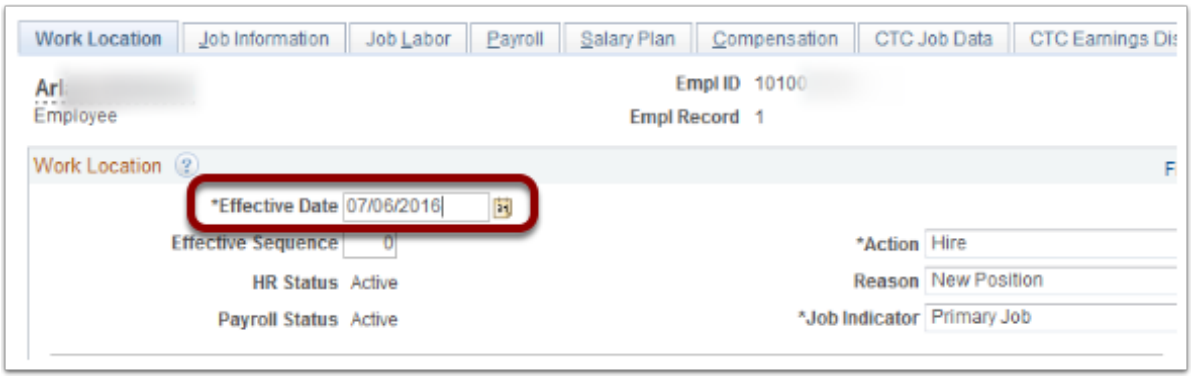
Override Employee Record Number in Maintain Faculty Workload

1. After the **FWL Calculation Process** has been run to load the **FWL Grid**, navigate to the **Maintain Faculty Workload** page.
2. In the **HCM Position Job Summary** section, the new job record will be visible and can be viewed in HCM.
   - All job records for the configured Employee Classifications (FAC, PTF) are visible in 'real time' from HCM so long as the job is in an '*Active*' HR status.
   - In order to send faculty pay to payroll, the payroll status must also be in an 'Active' status.

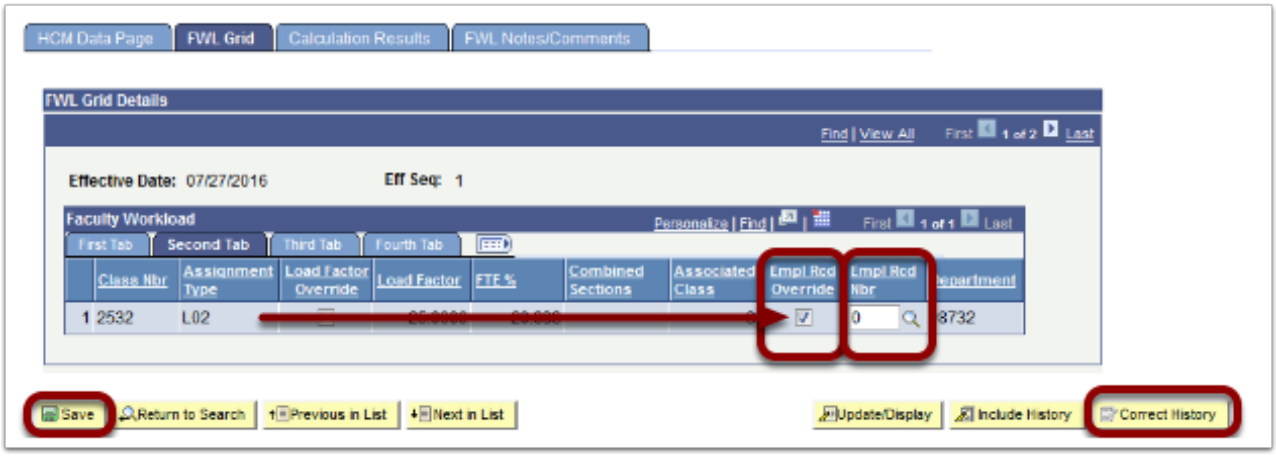


> **Note:** If you look at the **Job Data** record, you will see that the **Effective Date** of the hire

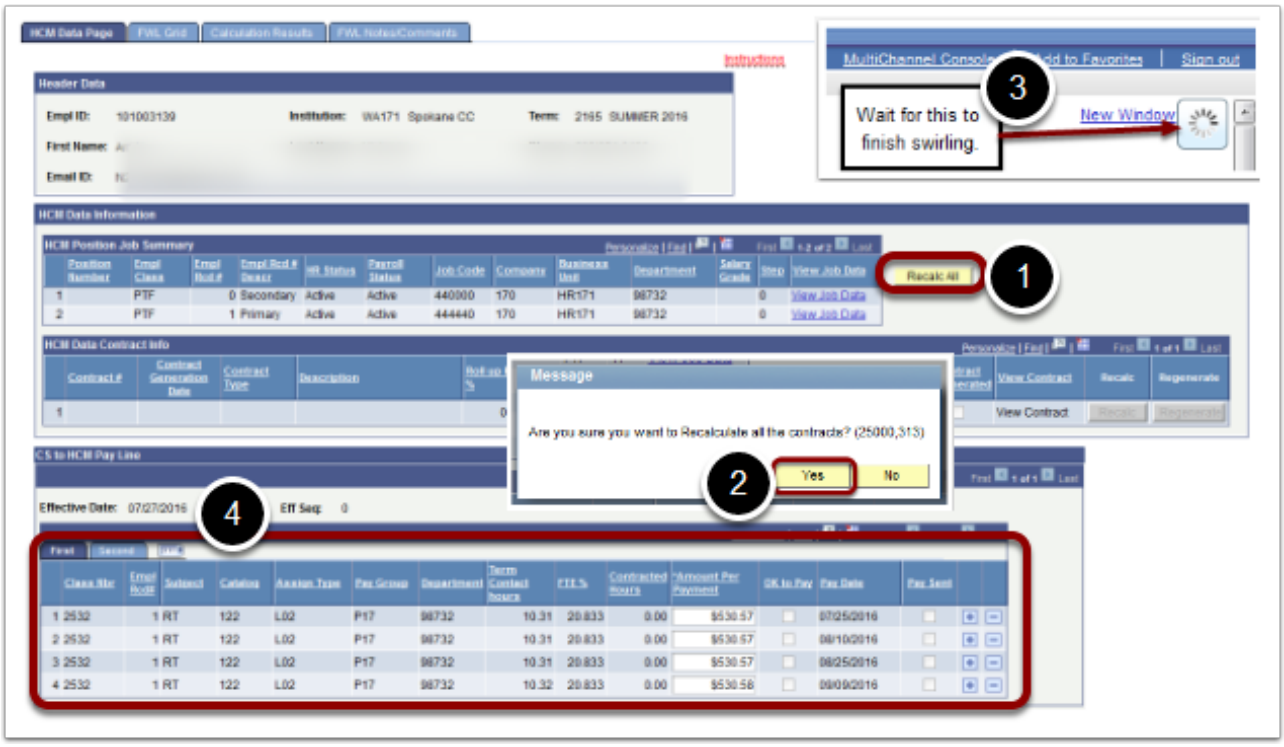
record is after the start of the term, which prevents seeing the job record from the delivered **Schedule of Classes** page. If the instructor was hired after the start of the class you may need to prorate the contract pay. For information on prorating pay, refer to the Quick Reference Guide - [Prorating Contracts for Instructor Late Starts or Early Departures](#).



3. Click on the **FWL Grid** tab.
4. Make sure the **Correct History** button is clicked.
5. On the **FWL Grid** page, click the **Second** tab.
6. Check the **Empl Rcd Override** check box to open the next field for editing.
7. Update the **Empl Rcd Nbr** field.
8. Click **Save.**



9. Click on the **HCM Data Page** tab.
10. Click the **Recalc All** button.
11. At the '*Are you sure you want to Recalculate all the contracts?*' message, click the **Yes** button.
12. The system wait icon will appear in the upper, right hand corner of the screen.
13. When the calculation is complete the screen will refresh and display a draft **Pay Line** and updated **Calculation Results.**



14. Click the **Calculation Results** tab. Verify the results (FTE%, Pay, Term Contact Hours) are accurate for the student count.
15. If **Calculation Results** are accurate, click on the **HCM Data Page** tab, and verify/update the **Pay Line Earnings Code** and **Account Code** (combo code) on the **Second** tab.
16. After all lines have been updated, click Save.
17. Once complete, move on to generating the online contract.

> **Note:** Not sure how to run the FWL Contract Generation Process to generate the online contract/appointment letter? Refer to the Quick Reference Guide - FWL Contract Generation (Batch).

Prorating Contracts for Instructor Late Starts or Early Departures

Purpose: Use this document as a reference for how to adjust the start/end date(s) and pay on a contract when the instructor is hired late, or must leave a class teaching assignment earlier than planned.

Audience: Class Scheduling Staff, HR\Payroll Staff

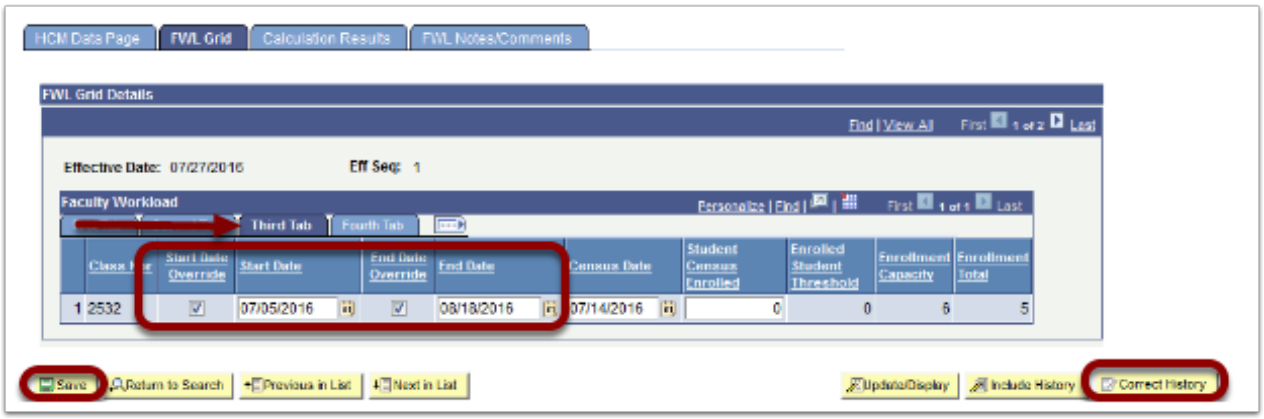
Navigation: Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

1. Add the instructor assignment in **Schedule of Class** and run the **FWL Calculation Process** to load the **FWL Grid.**

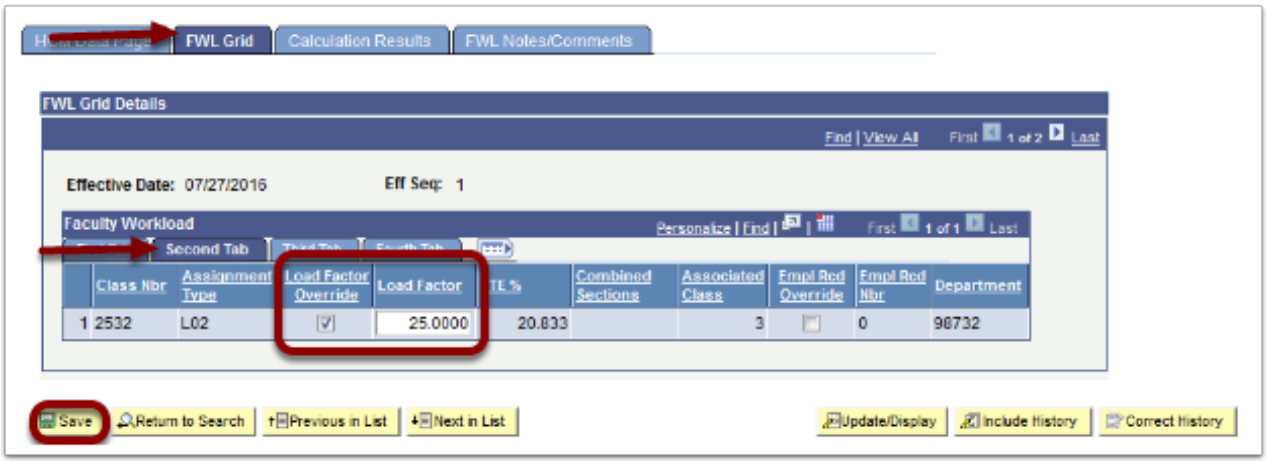
Note: Not sure how to proceed with step 1? Refer to these Quick Reference Guides:

- Add Instructor Assignment to Schedule of Class
- FWL Contract Generation (Batch).

2. After the **FWL Calculation Process** has been run to load the **FWL Grid**, navigate to the **Maintain Faculty Workload** page.
3. Click on the **FWL Grid** tab.
4. Click the **Correct History** button to allow changes.
5. Click on the **Third** tab.
6. To change the contract start date, check the **Start Date Override** check box to open the **Start Date** field for editing.
7. To change the contract end date, check the **End Date Override** check box to open the **End Date** field for editing.
8. Click **Save.**



9. If the **Load Factor** is used in the contract formula, the contact pay can be prorated by entering in the checking the **Override Load Factor** check box.
10. Prorate the **Load Factor** value.
11. Click **Save**.



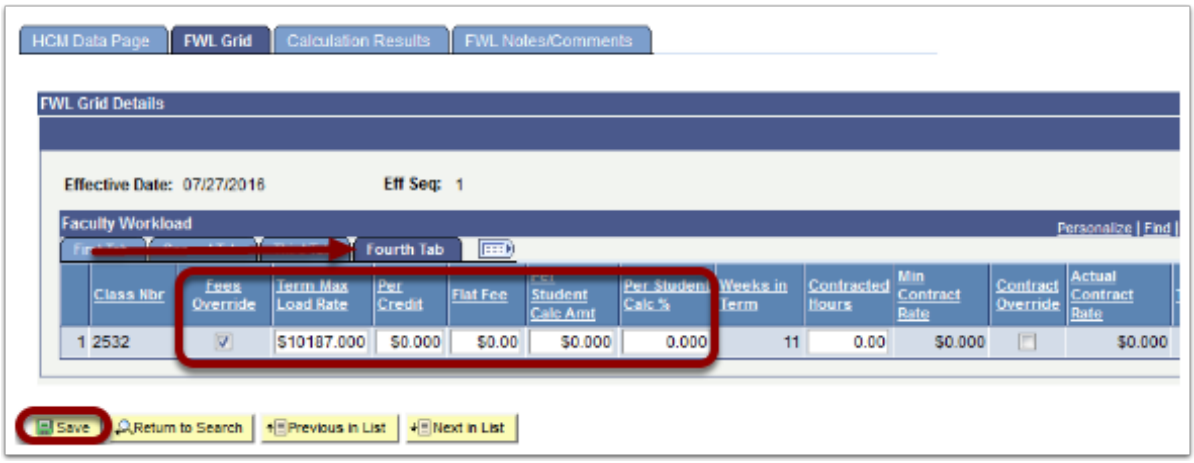
12. Click on the **HCM Data Page** tab.
13. Click the **Recalc All** button.

> **Warning:** Proration of Load Factor adjusts both pay and hours. Proration of fees only does not adjust the hours of a contract.

14. If **Load Factor** is <u>not</u> used in the contract formula, adjustments can be made directly to the fees.
15. Click on the **Fourth** tab of the **FWL Grid**.
16. Check the **Fees Override** check box to open the various fee fields for editing.
17. Adjust the relevant fee used in the formula for pay:
    - If **Term Max Load Rate** is the factor used for pay, determine the number of weeks in the term and prorate the rate to adjust for the start/end date of the instructor's assignment.
    - If **Per Credit** is the factor used for pay, determine the number of weeks in the term and prorate the rate to adjust for the start/end date of the instructor's assignment.

- If the calculation configuration is designed to allow for use of a **Flat Fee**, zero out the other fee fields and enter the full prorated dollar value into the **Flat Fee** field.

18. When done entering the prorated fee amount, click **Save.**



19. Click on the **HCM Data Page** tab.
20. Click the **Recalc All** button.
21. After the contract proration is complete, verify the **Calculation Results**.
22. Review/Update the **Earn Code** and **Account Code** on the **Pay Line**.
23. Run the **FWL Contract Generation Process** to generate the online contract.
24. Follow your college's contract approval process.

Note: For information on how to run the FWL Contract Generation Process to generate the online contract/appointment letters, refer to the Quick Reference Guide - [FWL Contract Generation (Batch)](#).

Alert: If an instructor has been terminated, their **Job Data** record in FWL will not be visible. Only '*Active*' job records appear in Faculty Workload. You will need to work with HR to temporarily 're-open' the **Job Data** record in **HCM** in order to recalculate pay. Keep in mind, the job record will need to remain open until the pay has been processed.

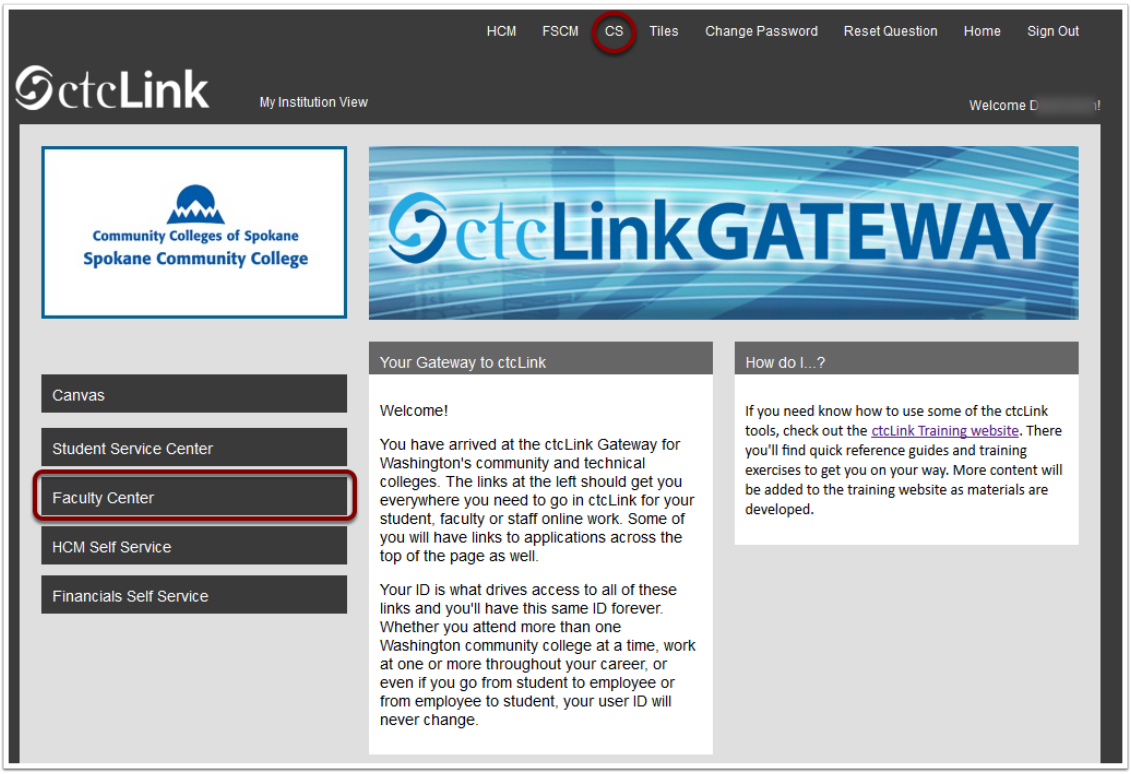
Accepting\Rejecting a Contract in the Faculty Center

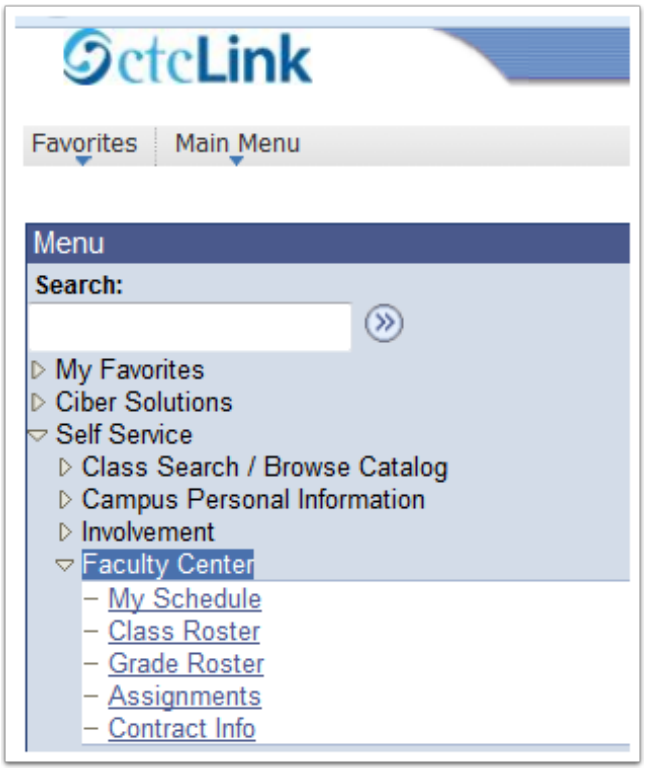
Purpose: Use this document as a reference for how to accept or reject an approved contract (appointment letter) from the Contract Data tab in the Faculty Center.

Audience: Instructors\Faculty, HR\Payroll

Navigation: Main Menu> Self Service > Faculty Center> Contract Info

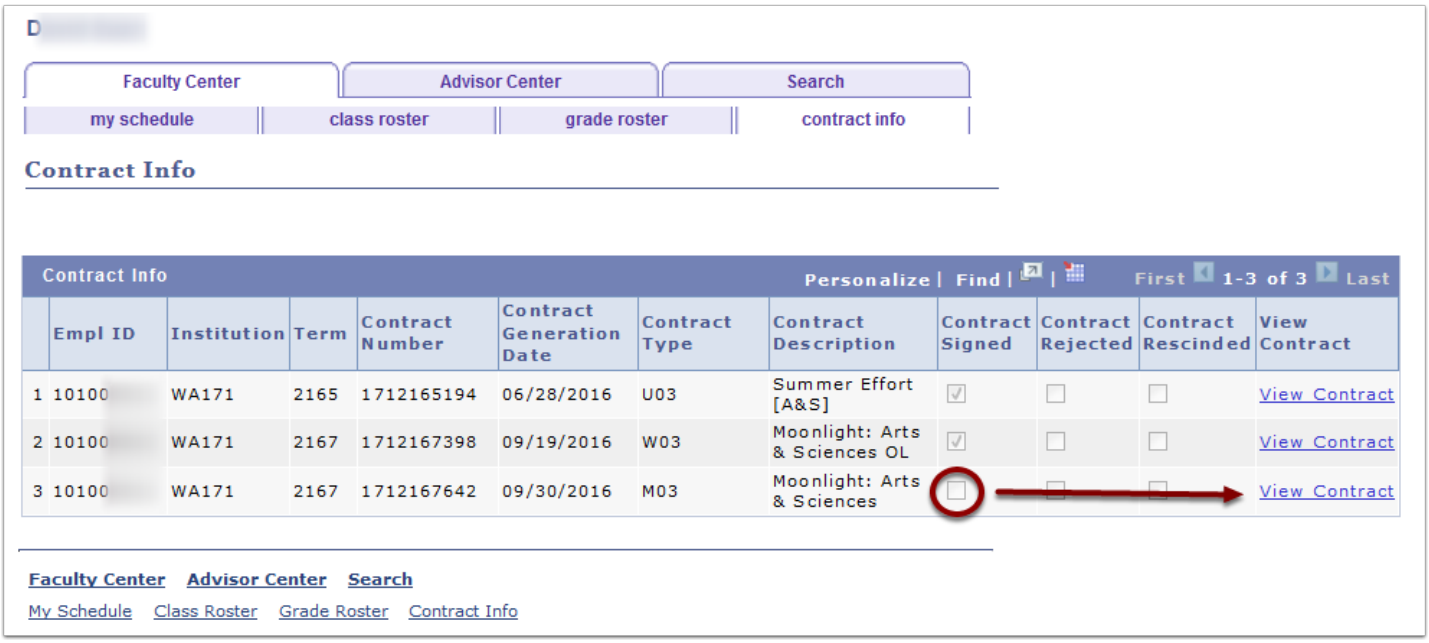
Faculty Center is available on the ctcLink Gateway (portal) page by following the direct link on the left side pane under the college logo. The Faculty Center can also be accessed within the Campus Solutions (CS) pillar, by following the CS link at the top of the ctcLink Gateway page and using the navigation below:





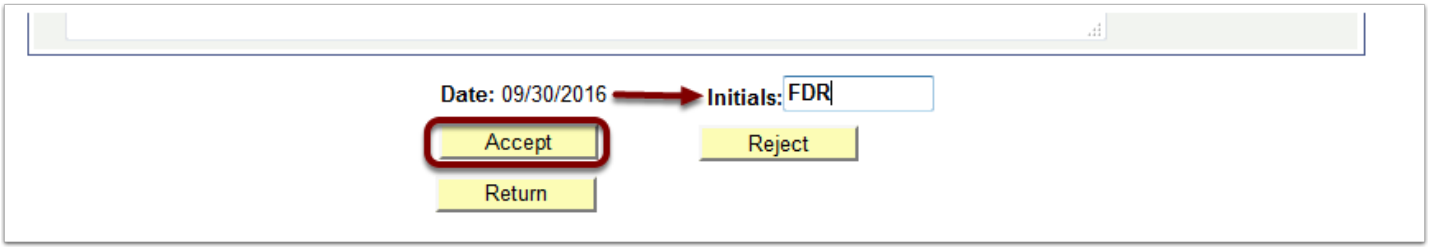
On the Contract Info page in the Faculty Center all contracts (appointment letters) are displayed, listed by Term.

1. Find the contract to be signed, shown below as missing a check in the Contract Signed check box.
2. Click on the View Contract link to the right of the check box.



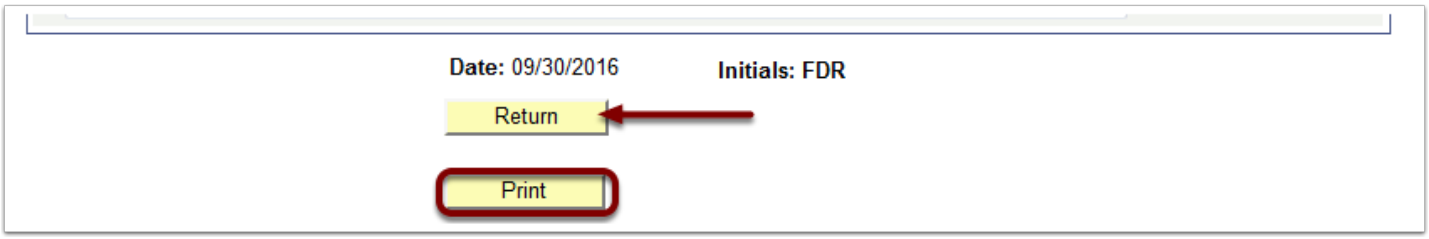
3. Scroll to the bottom of the electronic contract (appointment letter), under the contract generation date the Accept and Reject buttons are displayed.

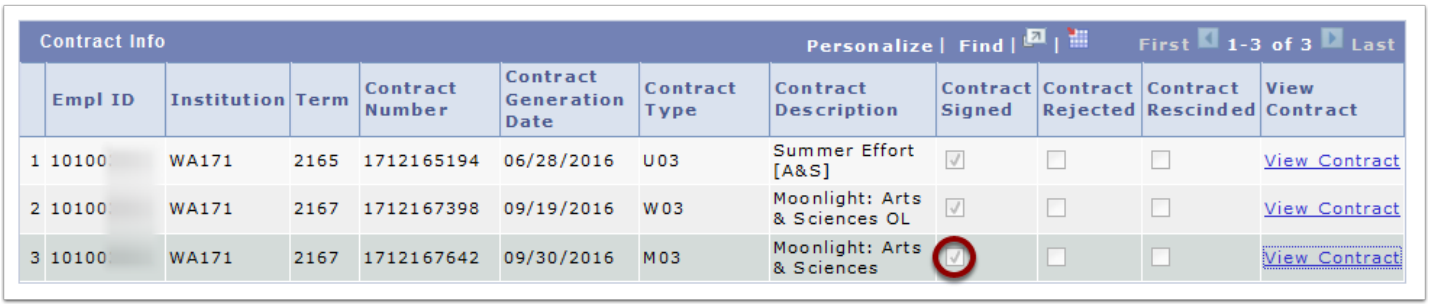
4. To the right of the contract generation date, in the Initials field, enter your initials, representing your electronic signature on the contract, which is stored in the contract along with the User ID and date/time stamp of the person signing the contract.



5. If the Accept button is clicked, a pop up message will appear, confirming the intention to accept the contract. Click Yes to confirm.

6. After accepting the contract, the Print button will appear, enabling the printing of the contract on a network printer.
7. To exit the contract and return to the Contract Info page on the Faculty Center.





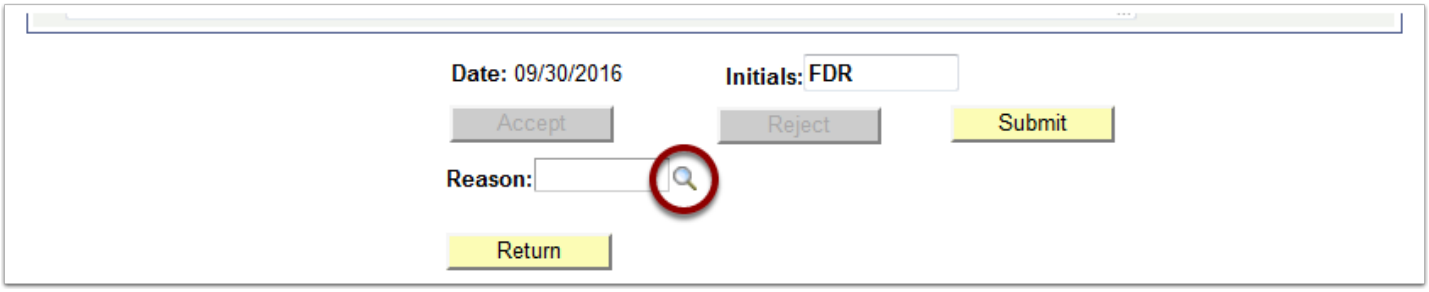
Contract Info — Personalize | Find | First 1-3 of 3 Last

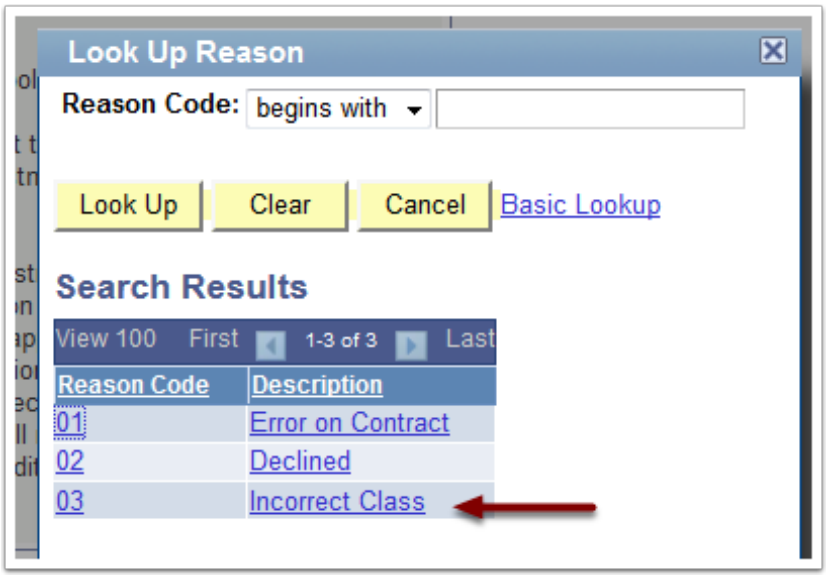
	Empl ID	Institution	Term	Contract Number	Contract Generation Date	Contract Type	Contract Description	Contract Signed	Contract Rejected	Contract Rescinded	View Contract
1	10100	WA171	2165	1712165194	06/28/2016	U03	Summer Effort [A&S]	☑	☐	☐	View Contract
2	10100	WA171	2167	1712167398	09/19/2016	W03	Moonlight: Arts & Sciences OL	☑	☐	☐	View Contract
3	10100	WA171	2167	1712167642	09/30/2016	M03	Moonlight: Arts & Sciences	☑	☐	☐	View Contract

8. If the Reject button is clicked, a pop up message will appear, confirming the intention to reject the contract. Click Yes to confirm.

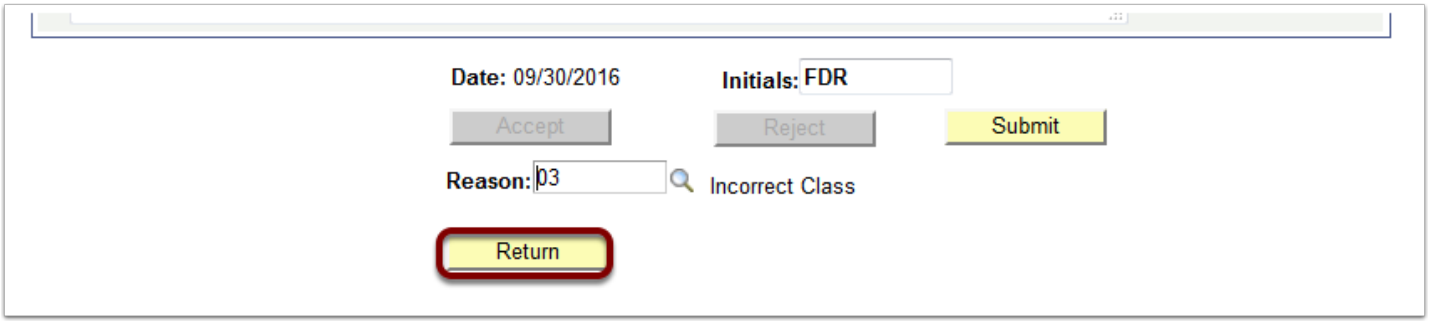
9. The system requires Initials to be entered before clicking the Reject button, if not entered, an error message will appear enforcing the requirement.

10. When rejecting a contract, the system allows, but does not require entry of a reason for the contract rejection.

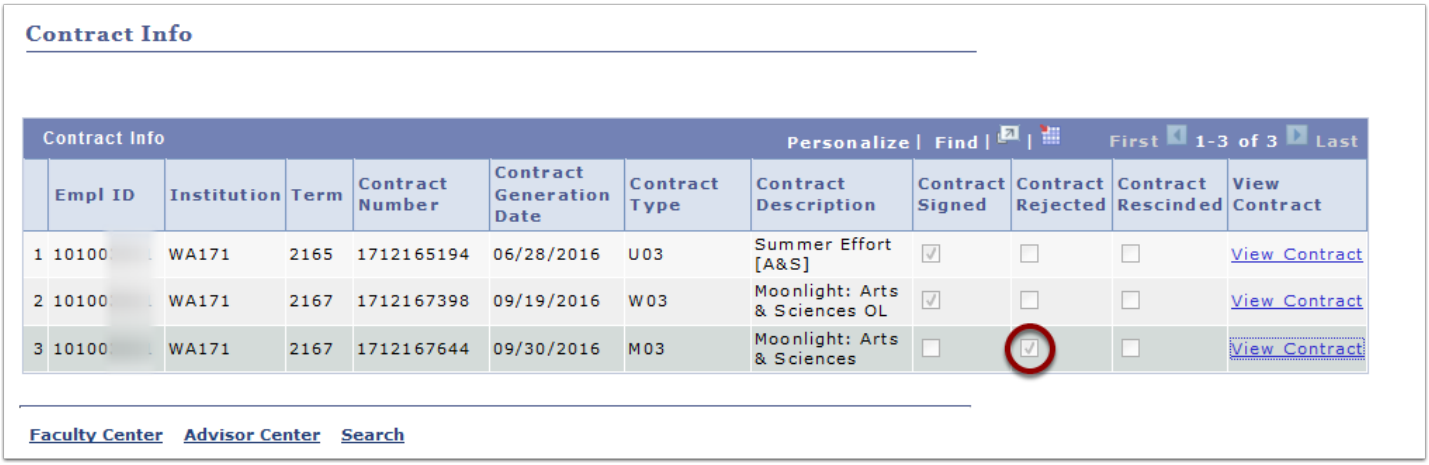




11. Once a contract rejection reason is selected, it will populate both code and description on the page.
12. Click the Return button to exit the page and return to the Contract Info page.



13. Once returned to the Contract Info page, a check will appear in the Contract Rejected check box.



Spokane ONLY

Processing Independent Study Contracts - SPOKANE ONLY

Purpose: Use this document as a reference for how to process Independent Study contracts at Community Colleges of Spokane. Independent Study Contracts are calculated at the Census Date (typically 10th day) of the class.

Audience: Class Scheduling Staff

Navigation:

Main Menu → Curriculum Management → Schedule of Classes → Maintain Schedule of Classes

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Calculation Process

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Contract Generation

Overview

Calculating Independent Study contracts (I01-I18) applies to classes that have the Component of Independent Study. At Community Colleges of Spokane instructor pay for Independent Study classes is based on $50 per the number of units (credits) multiplied by the number students enrolled. The resulting value is the amount of pay the instructor is eligible for. For example, $50 per unit for a 5 unit class with 2 students enrolled equates to $500.00 dollars. Independent Study classes do not earn FTE% nor calculate Term Contact Hours. The Load Factor in the Schedule of Class is not a factor in Co-Op pay.

Independent Study contracts do not automatically calculate for variable credit courses where students are enrolled for less than the maximum units of the course. See the section on managing variable credits for instructions on how to manage these types of contracts.

Note: For Spokane the Assignment Type naming convention begins with 2 to 4 characters code that specify the division issuing the contract (noted by '*DDDD*' in the example below) for Independent Study contracts the Assignment Type is followed by [I].

'*DDDD*' [I] - Independent Study

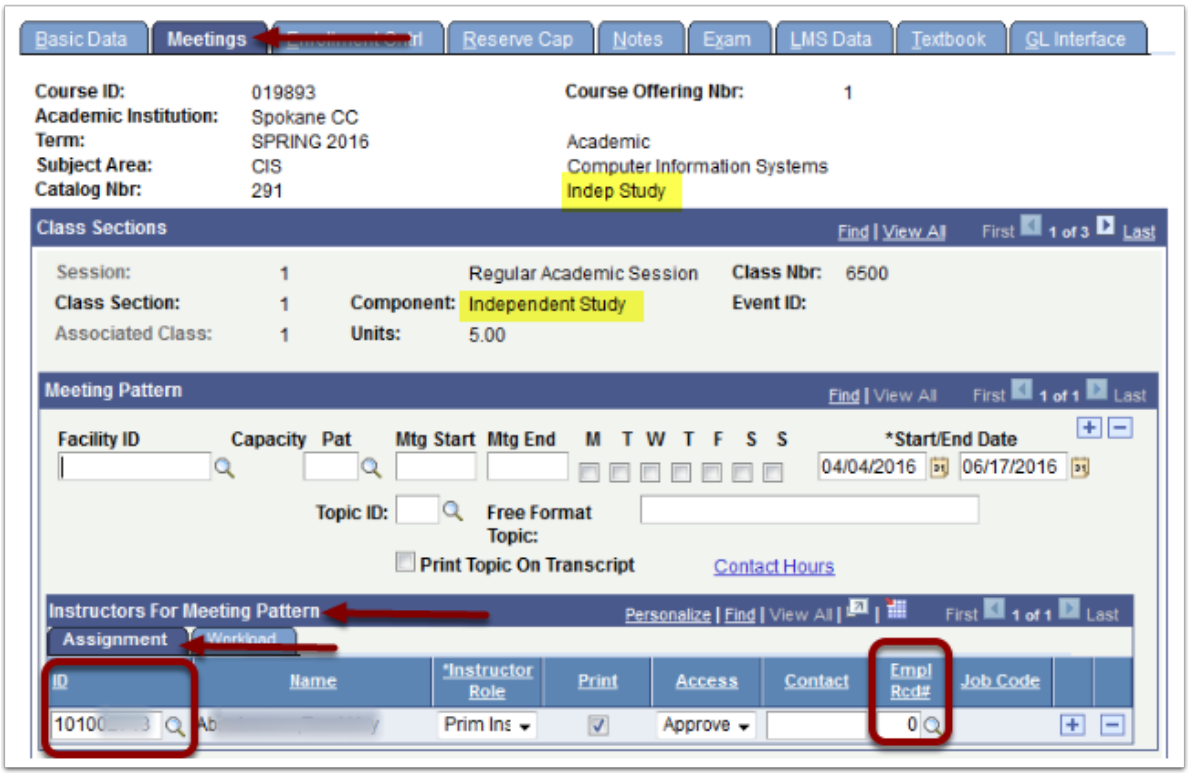
Checklist Steps for Independent Study Contracts (Spokane Only)

- Confirm the instructor exists on the Instructor/Adviser Table for the institution with an Effective Date of 01/01/1901.
- Add the Instructor to class in Schedule of Class once, using the Independent Study Assignment Type, using the plus (+) symbol to add a new row if needed:
  - Ensure that the Empl Record Number is that of the correct job record.
    - If hired after Term start, use system default of 0 and override the Empl Rcd Nbr in the FWL Grid, adjusting start date and prorating Term Max Load Rate if needed.
  - Note: Load Factor is left at 100%, as it is not a factor in Independent Study calculations.
- Run FWL Calculation Process to Load the FWL Grid.
- Update FWL Grid-Tab 3 to enter the number of students enrolled.
- Click Save.
- Process a FWL Recalculation.
- Review and confirm Calculation Results tab.
- Review the Pay Line, if needed, update Earn Code and Combo Code.
- Run FWL Contract Generation.
- Verify the online contract/appointment letter.
- Update Notes/Comments tab with HCM for HR review.
- Ensure Dean/Administrator approves the contract.
- Ensure instructor has gone into Faculty Center and signed the contract.

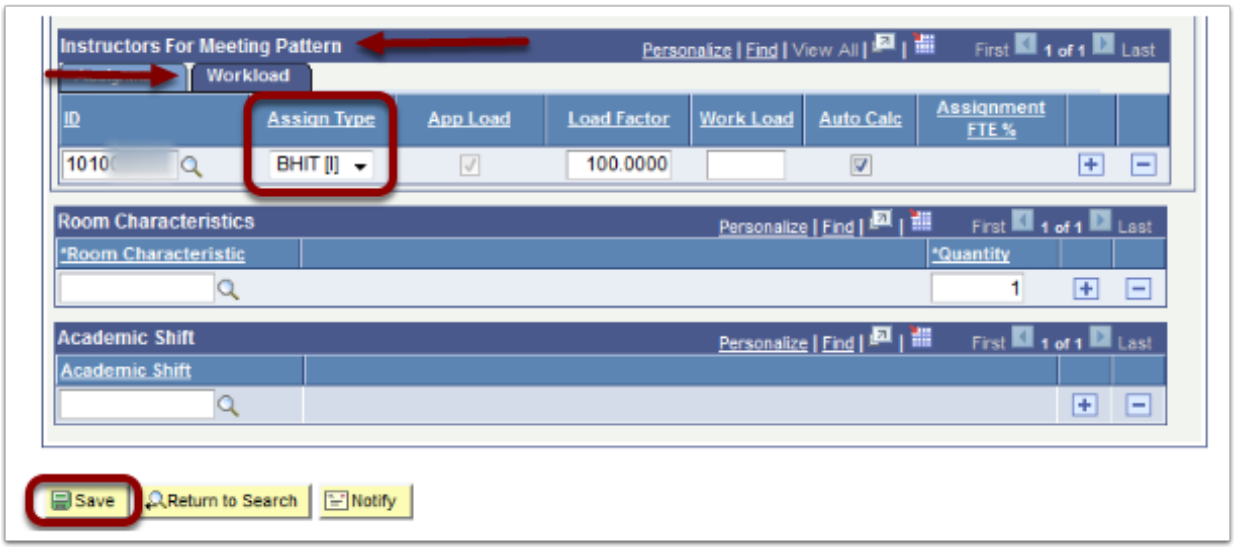
> **Note:** To confirm an instructor has a record on the Instructor/Adviser Table, refer to the Quick Reference Guide - Adding and Instructor to the Instructor/Adviser Table.

Add Instructor Assignment in Schedule of Class

1. In **Schedule of Class,** use the search feature to open the **Independent Study** class and click on the **Meetings** tab.
2. In the **Instructors for Meeting Pattern** section, on the **Assignment** tab, enter the **Empl ID** of the instructor or use the Look Up to search by name.
3. Also on the **Assignment** tab, enter the **Empl Rcd#** or use the Look Up.
4. Click the **Workload** tab.



5. On the **Workload** tab, in the Assign Type field, click the drop-down menu and select the appropriate **Assignment Type** value for your division with the [I].
6. **Load Factor** can be ignored as it is not used in the calculation.
7. Click **Save**.

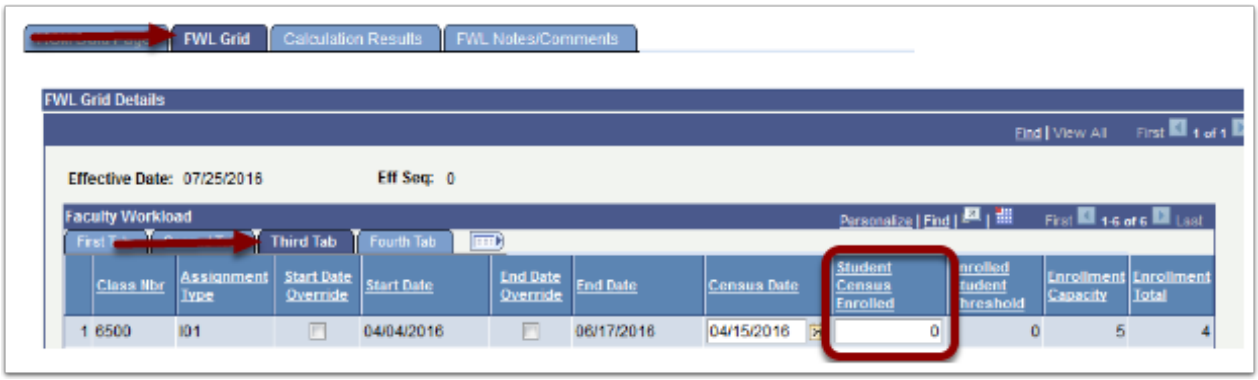


Note: Not sure how to run the FWL Calculation Process to load the FWL Grid? Refer to the Quick Reference Guide - FWL Calculation Process (Batch).

Update Maintain Faculty Workload

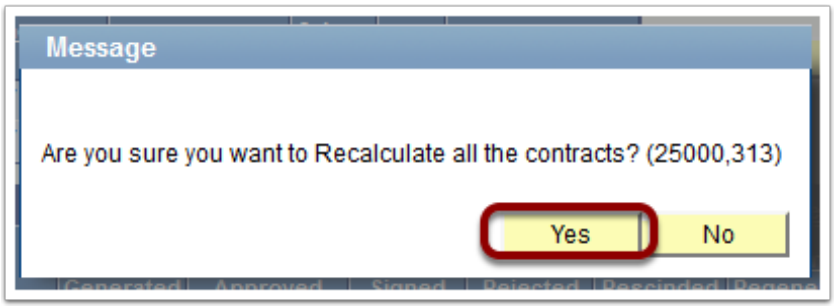
1. After the **FWL Calculation Process** has been run to load the **FWL Grid**, navigate to the **Maintain Faculty Workload** page and click on the **FWL Grid** tab.
2. On the **Calculation Result** page. The **Contract Type** for *Independent Study* should appear with $0 Total Pay. In order to generate pay, the number of enrolled students on the 10th day must be entered into the **FWL Grid**.
   - If the calculation result doesn't appear check the following:
     - Is the Empl Rcd Nbr entered in Schedule of Class for an active FAC or PTF job?
     - Is the Subject and Component configured for the Co-Op contract or is the first time this combination has been offered?

3. Click on the **FWL Grid** tab.
4. On the **FWL Grid** page, click the **Third** tab.
5. Add the number of enrolled students on the census date of the class to the **Student Census Enrolled** field.
6. Click **Save**.

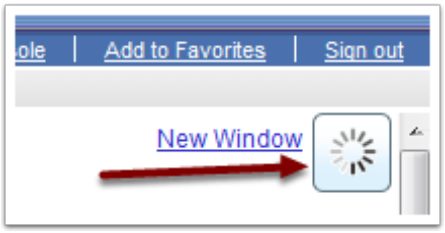


> **Tip:** Did you know you can re-organize the fields you see on the **FWL Grid**? Just click the *Personalize* link and re-order the fields. Want all the most relevant fields on the First Tab, just use the fields you want in the **Column Order** and move them up to the top under the *Tab First Tab (frozen)* header. You can also hide fields that aren't important to you. This formatting will be tied to only your login and will follow you wherever you go when you login to ctcLink.

7. Click the **HCM Data** tab, click the **Recalc All** button.
8. At the '*Are you sure you want to Recalculate all the contracts?*' message, click the **Yes** button.

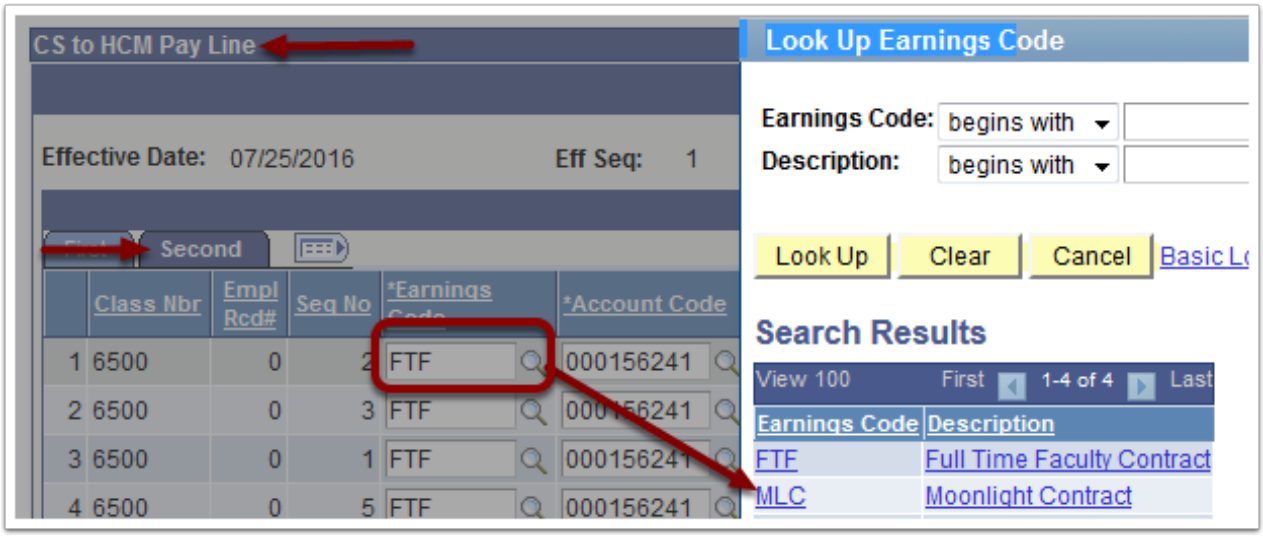


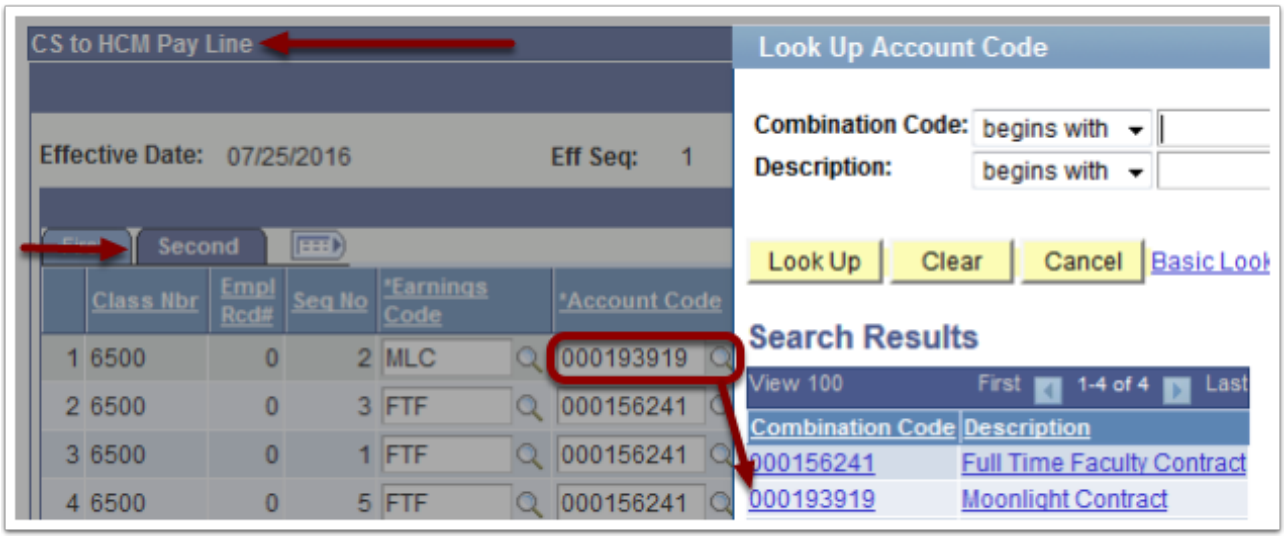
9. The system wait icon will appear in the upper, right hand corner of the screen.



10. When the calculation is complete the screen will refresh and display a draft **Pay Line** and updated **Calculation Results**.
11. Click the **Calculation Results** tab. Verify the Total Pay for Term is accurate for the student count.

12. If Calculation Results are accurate, click on the **HCM Data** tab, and verify/update the **Pay Line Earnings Code** and **Account Code** (combo code) on the Second tab.



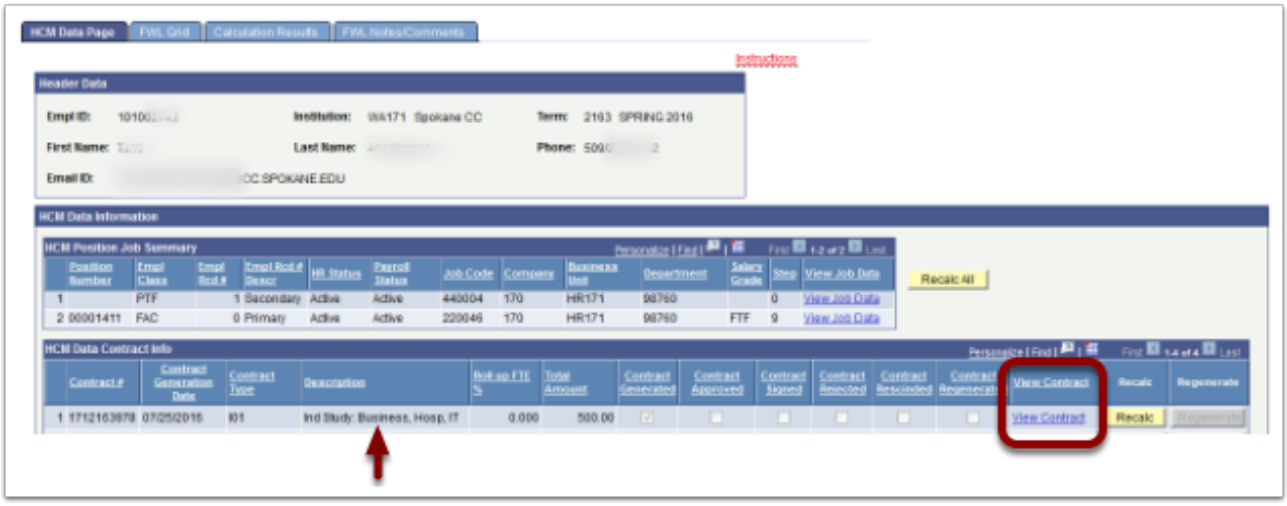


13. After all lines have been updated, click **Save**.

Generation and Review Online Contract

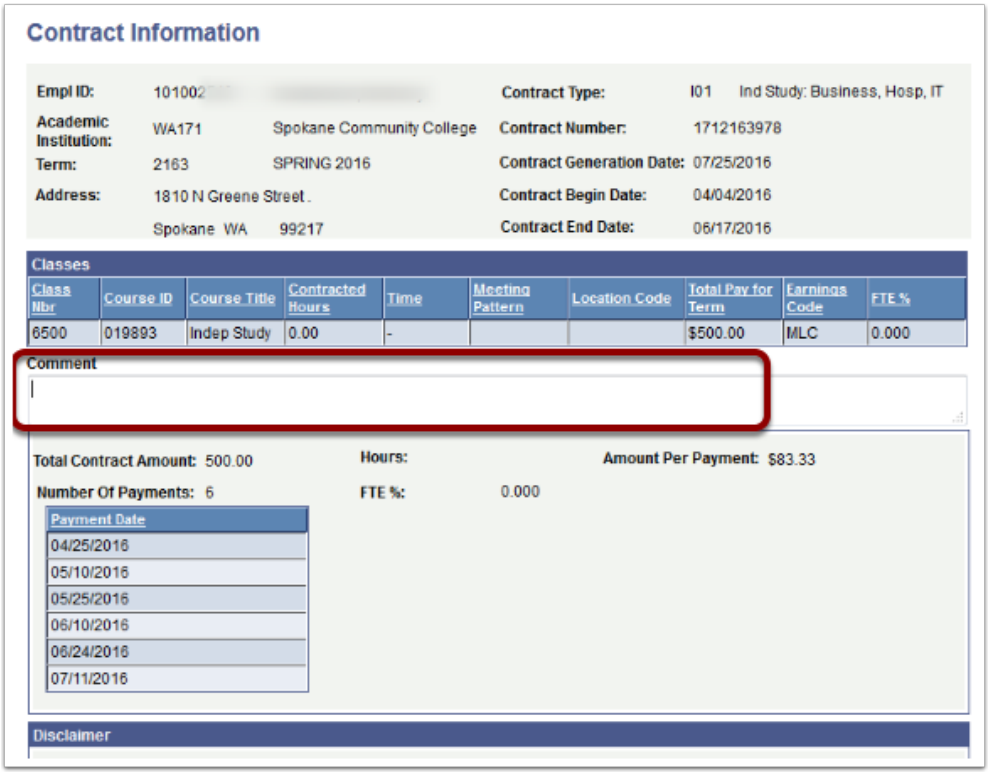
> **Note:** Not sure how to run the FWL Contract Generation Process to generate the online contract/appointment letter? Refer to the Quick Reference Guide - [FWL Contract Generation (Batch)](#).

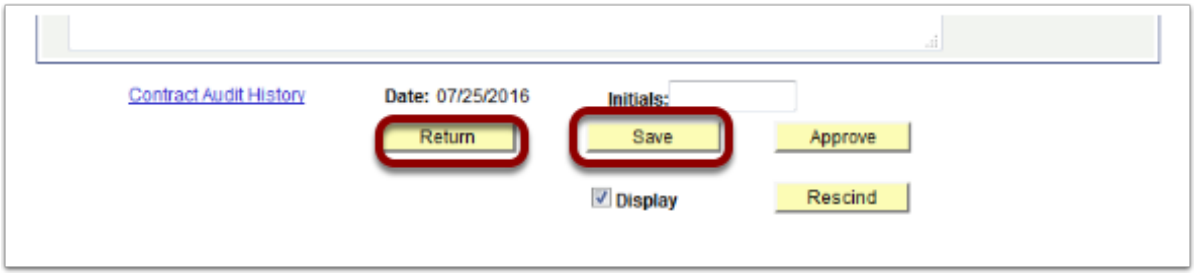
1. After the contract has been generated, navigate back to **Maintain Faculty Workload**, on the **HCM Data** tab, in the **HCM Data Contract Info** section, click the **View Contract** link for the Independent Study contract type (e.g. I01) to open the online contract and verify the details.



2. (optional) Add any comments you deem necessary to communicate information for this specific contract to the instructor.

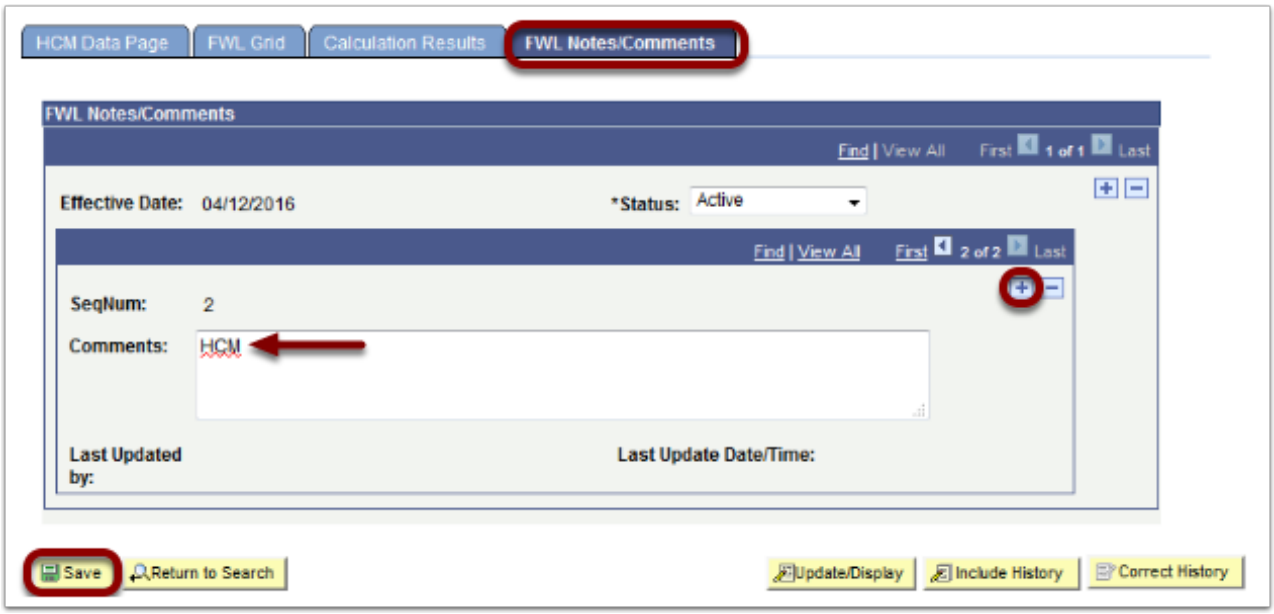
- If comments added, click **Save** then **Return**.
- If no comments added, click **Return** to exit the contract view and return to the FWL page.





Add Note for HR Review

1. After the contract is verified and any comments have been added, click the **FWL Notes/ Comments** tab to update the notes with **HCM** in the first three positions. This will cause this contract to appear on the report run by HR noting which contracts area ready for HR review. If entries already exist on this page, click the Plus (+) symbol to add a new Sequence Number to enter a fresh comment.
2. Click **Save**.

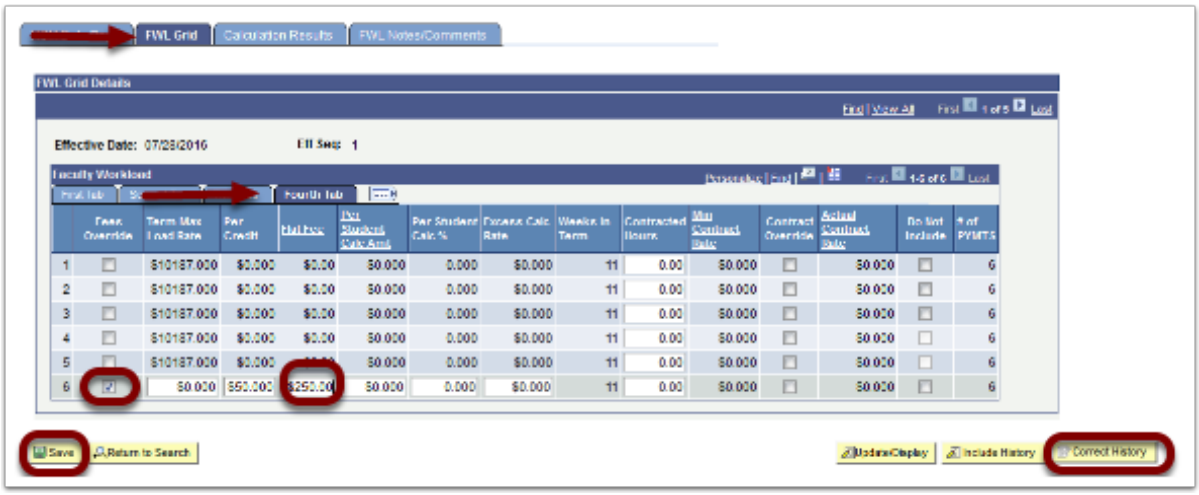


3. Ensure Dean/Administrator approves the contract.
4. Ensure instructor has gone into Faculty Center and signed the contract.

Handling Pay Adjustments for Variable Credit Independent Studies

When all students enrolled in an Independent Study class are all enrolled for the same credits, the Faculty Workload process calculates $50 per credit, times the number of students enrolled. When an Independent Study class has students enrolling for less than the maximum credits of the class the system is not able to calculate pay based on the variation. In order to manage this follow these steps to change the pay fields on the FWL Grid:

1. Navigate to the **Maintain Faculty Workload** page.
2. Click on the **FWL Grid** tab.
3. Click on the **Fourth** tab.
4. Make sure the **Correct History** button is clicked.
5. If the **Correct History** pop-up window appears, click **Cancel** to turn on Correct History.
6. Click the **Fees Override** check box to open the **Flat Fee** field for editing.
7. Enter the total pay amount for the contract into the **Flat Fee** field.
8. Click **Save**.
9. Click on the **HCM Data Page** tab.
10. Click **Recalc All** to recalculate the contract, ignoring the **Per Credit Rate** and directly inputting the *Total Pay* for the contract.


FWL Grid
Calculation Results
FWL Notes/Comments
FWL Grid Details
Find | View All
First 1 of 5 Last
Effective Date: 07/28/2016
Eff Seq: 1
Faculty Workload
Personalize | Find
1-6 of 6
Fourth Tab
Fees Override
Term Max Load Rate
Per Credit
Hol Pay
Per Student Calc Amt
Per Student Calc %
Excess Calc Rate
Weeks in Term
Contracted Hours
Max Contract Rate
Contract Override
Actual Contract Rate
Do Not Include
# of PYMTS
1 $10187.000 $0.000 $0.00 $0.000 0.000 $0.000 11 0.00 $0.000 $0.000 6
2 $10187.000 $0.000 $0.00 $0.000 0.000 $0.000 11 0.00 $0.000 $0.000 6
3 $10187.000 $0.000 $0.00 $0.000 0.000 $0.000 11 0.00 $0.000 $0.000 6
4 $10187.000 $0.000 $0.00 $0.000 0.000 $0.000 11 0.00 $0.000 $0.000 6
5 $10187.000 $0.000 $0.000 0.000 $0.000 11 0.00 $0.000 $0.000 6
6 $0.000 $53.000 $250.00 $0.000 0.000 $0.000 11 0.00 $0.000 $0.000 6
Save
Return to Search
Update/Display
Include History
Correct History

Processing FT Online Overload Contracts - SPOKANE ONLY

Purpose: Use this document as a reference for how to process Co-operative Education contracts at Community Colleges of Spokane.

Audience: Class Scheduling Staff, HR\Payroll Staff

Main Menu → Curriculum Management → Schedule of Classes → Maintain Schedule of Classes

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Calculation Process

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Contract Generation

Overview

When Full Time Faculty are teaching online classes with enrollments that exeed 25 students as part of their regular load, the overloaded students from the online class are paid above the instructor's regular salary. The overloaded students also generate FTE% for that instructor and that overload FTE% is not typically* attributed as part of their regular load. Because the instructor's regular load is calculated in FWL as non-pay generating (FTE Only), but the FT Online Overload does generate pay in FWL, there are two different calculation formulas. The regular load portion is calculated using the FTE Only contract types (F01-F20) and the overloaded students pay is calculated under the FT Online Overload contract types (X01-X18). This will require you to enter the instructor twice in the Instructors for Meeting Pattern section on the Schedule of Class. The online contract generated will be only for the overload portion of the FTE%.

At Community Colleges of Spokane instructor pay for online overload classes is based on the number of students enrolled above 25 students and below 36. If more than 35 students want to enroll a new class section is supposed to be opened. For questions on this please contact your district HR office.

The pay methology for FT Online Overload first takes into account what the class would be paid out as if the instructor would be paid as Moonlight pay, for example a 5 credit lecture in Workload Category A has an FTE% of 33.333% and moonlight pay of $3395.67 (1/3 of $10,187) - this is NOT what the instructor will be paid since their pay comes from their full time salary. Once the dollar value of the class is determined, this amount is divided by 25 to determine the 'per student' amount. Keep in mind, this value changes based on the dollar value of each class.

Using the example of pay above, 1/25th of $3395.67 results in $135.83 per student. As an alternate example, a 2 credit class at Workload Category C would have a dollar value of $1018.70 and 1/25th of that class would result in $40.75 per student.

Next comes determining the overload count, for example, 27 students enrolled, subtract the first 25 to determine that 2 students are overloaded. The overloaded student count is multiplied by the per student cost to calculate the total pay for overloaded students and the resulting value is the amount of pay the instructor is eligible for, for example $135.83 x 2 =$271.66 in total pay.

The Term Contact Hours of the contract are calculated by dividing the overloaded student count (2), by the threshold (25) to and then multiply by the Term Contact Hours of the class to determine the hours value of the overloaded students. For example 2/25 = .08 x 55 = 4.4 hours for the 2 students.

The FTE% of the contract is calculated by dividing the Term Contact Hours (e.g. 4.4) by the total hours of the workload category (e.g. 165), or 4.4 /165 = 2.667% FTE.

Note: For Spokane the Assignment Type naming convention begins with 2 to 4 characters code that specify the division issuing the contract (noted by '*DDDD*' in the example below) for FT Online Overload contracts the Assignment Type is followed by [FOL]. For FT Online Overload contracts that are multi-component (for example, Lecture/Lab) the Assignment Type is followed by [FOLL].

The FT Online Overload Assignment Types have a configuration of $10,187 or $11,170 in the Term Max Load Rate value, thus generating pay equivalent to Adjunct faculty, but only for the students enrolled over the maximum of 25, the regular load is paid from the instructor's full time salary.

'*DDDD*' [FOL] - FT Online Overload

'DDDD' [FOLL] - FT Online Overload (Lecture/Lab)

* If attempting to calculate FTE% only for overloaded students see bottom section of this QRG entitled "Overload as Regular Load."

Checklist Steps for FT Online Overload Contracts (Spokane Only)

- Confirm the instructor exists on the Instructor/Advisor Table for the institution with an Effective Date of 01/01/1901.
- Add the Instructor to class in Schedule of Class first, using the FT Regular Load Assignment Type.
- Add a second row for the instructor, using the FT Online Overload Assignment Type. Use the plus (+) symbol to add a new row (if needed). On each row:
  - Ensure that the Empl Record Number is that of the correct job record. Both rows must have the same number.
    - If hired after Term start, use system default of 0 and override the Empl Rcd Nbr in the FWL Grid, adjusting start date and prorating Term Max Load Rate if needed.

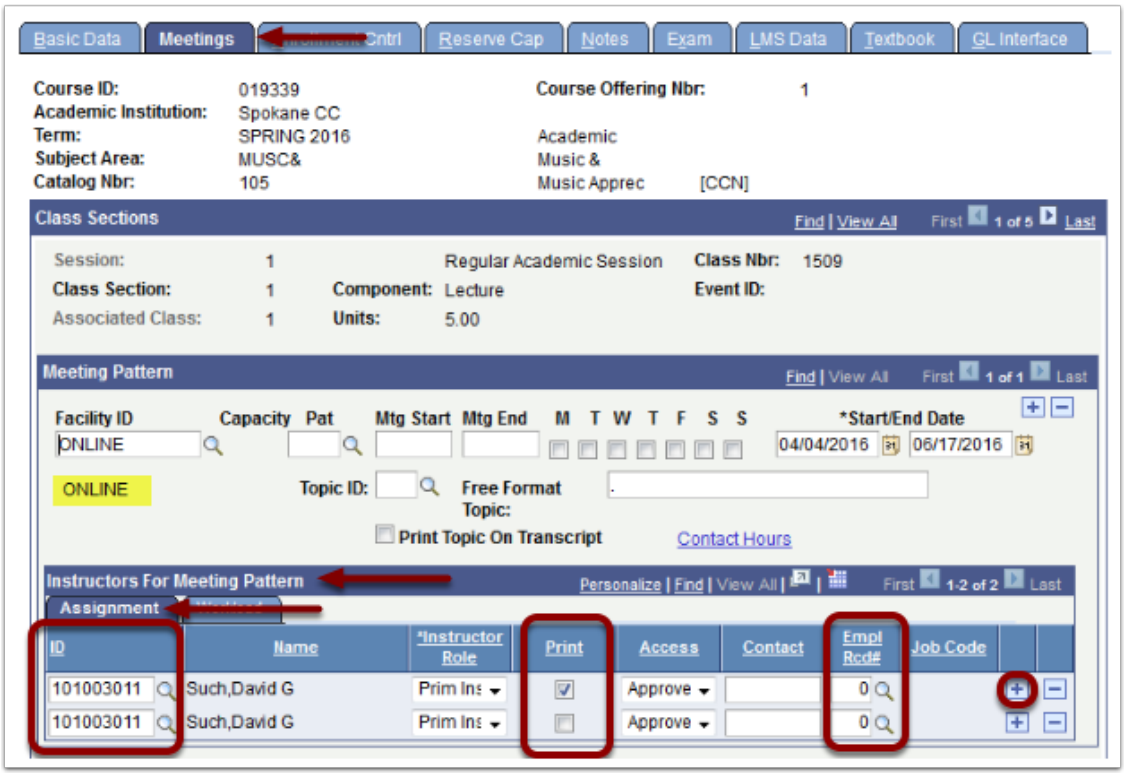
    - Ensure the Load Factor entered matches on both rows.

- Run FWL Calculation Process to Load the FWL Grid.
- Update FWL Grid-Tab 3 to enter the number of students enrolled for the FT Online Overload contract type.
- Click Save.
- Process a FWL Recalculation.
- Review and confirm Calculation Results tab.
- Review the Pay Line, if needed, update Earn Code and Combo Code.
- Run FWL Contract Generation.
- Verify the online contract/appointment letter.
- Update Notes/Comments tab with HCM for HR review.
- Ensure Dean/Administrator approves the contract.
- Ensure instructor has gone into Faculty Center and signed the contract.

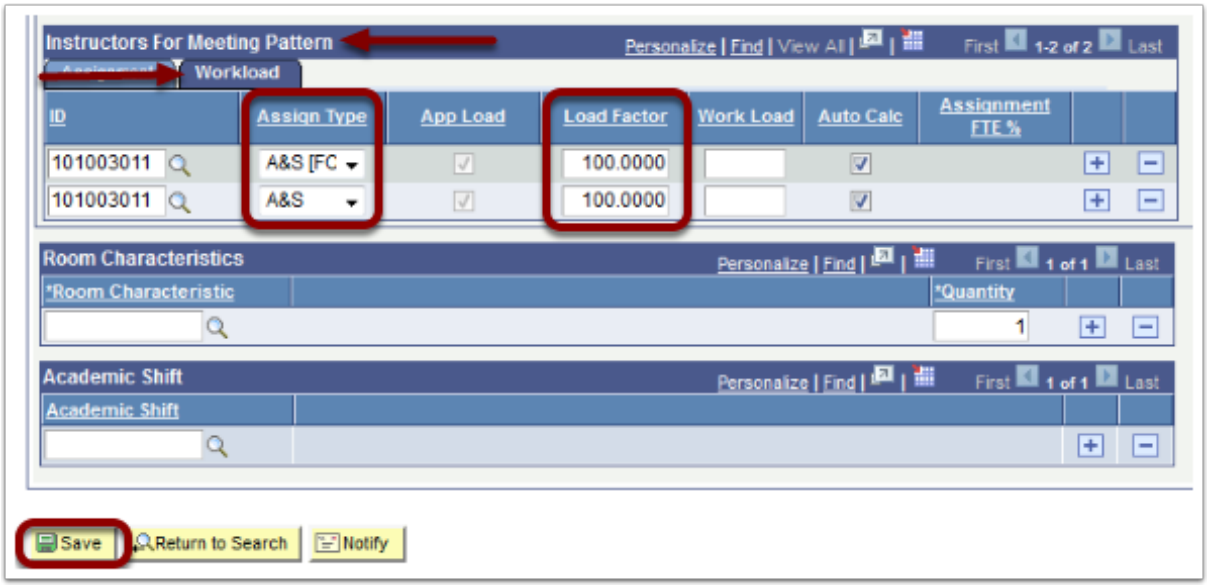
> **Note:** To confirm an instructor has a record on the Instructor/Advisor Table, refer to the Quick Reference Guide - Adding and Instructor to the Instructor/Advisor Table.

Add Instructor Assignment in Schedule of Class

1. In Schedule of Class, use the search feature to open the online class and click on the Meetings tab.
2. In the Instructors for Meeting Pattern section, on the Assignment Tab, enter the Empl ID of the instructor or use the Look Up to search by name.
3. Click the Plus (+) symbol to add a second line and enter the Empl ID again on the second line.
4. The Print check box should only be checked for one of the two rows.
5. Also on the Assignment tab, enter the Empl Rcd# or use the Look Up, making sure to enter the same number for both rows.
6. Click the Workload Tab.



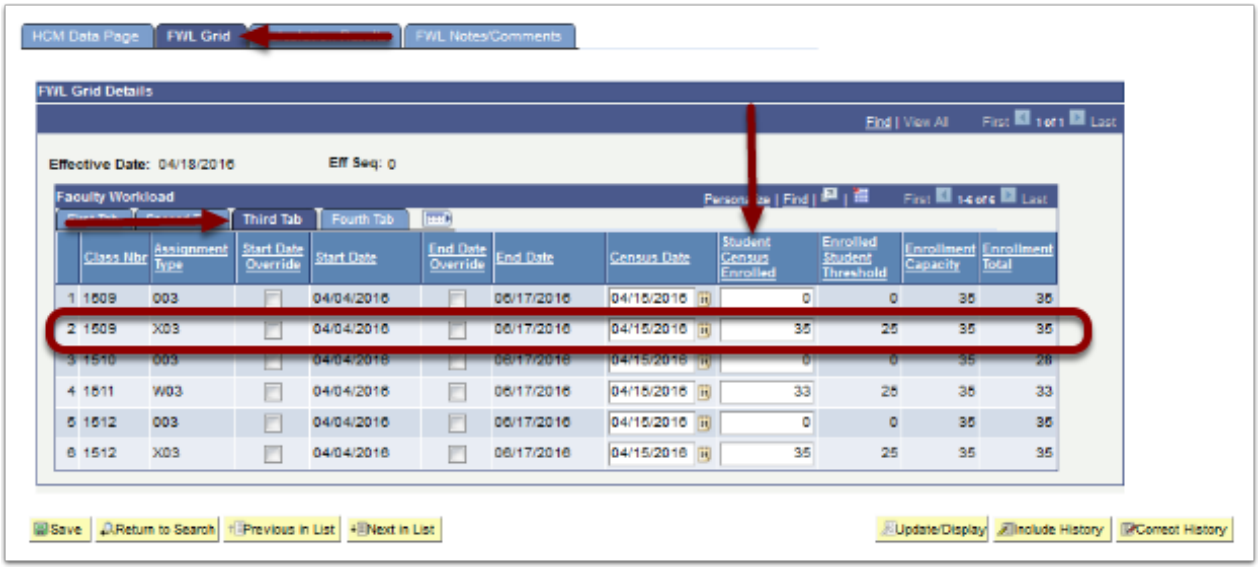
7. On the Workload tab, in the top row Assign Type field, click the drop-down menu and select the appropriate Assignment Type value for your division for the Full Time (regular load) - FTE Only.
8. On the second row, in the Assign Type field, click the drop-down menu and select the appropriate Assignment Type value for your divisionin with the [FOL] or [FOLL] for FT Online Overload contract.
9. Enter the same Load Factor for both rows.
10. Click Save.



Note: Not sure how to run the FWL Calculation Process to load the FWL Grid? Refer to the Quick Reference Guide - FWL Calculation Process (Batch).

Update Maintain Faculty Workload

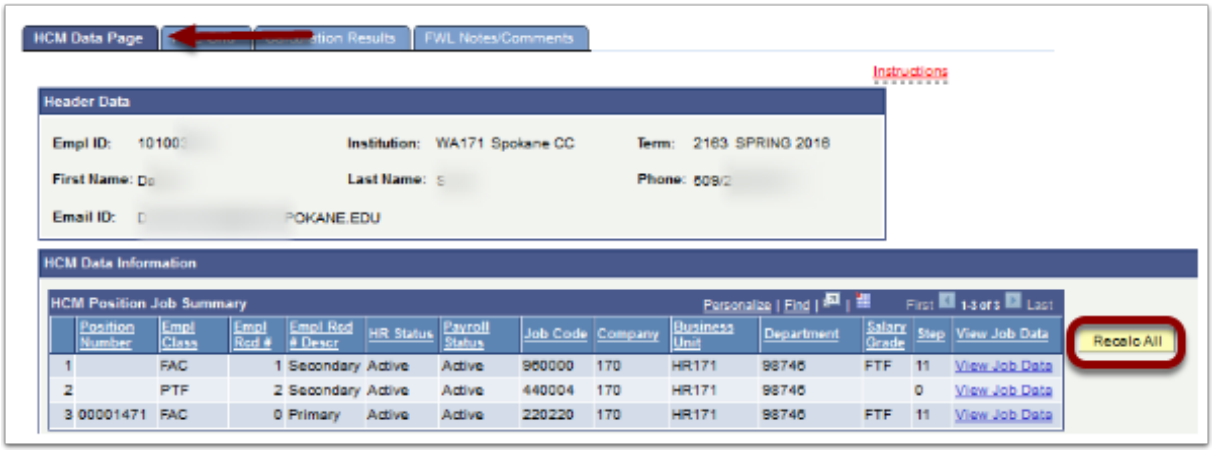
1. After the **FWL Calculation Process** has been run to load the **FWL Grid**, navigate to the **Maintain Faculty Workload** page and click on the **FWL Grid** tab.
2. On the **Calculation Result** page. The **Contract Type** for *FT Online Overload* will appear with 0.00 FTE% and $0 Total Pay. In order to generate FTE % and pay, the number of enrolled students on the 10th day must be entered into the **FWL Grid**.
   - If the calculation result doesn't appear check the following:
     - Is the Empl Rcd Nbr entered in Schedule of Class for an active FAC job?
     - Is the Subject and Component configured for the contract or is the first time this combination has been offered?
3. Click on the **FWL Grid** tab.
4. On the **FWL Grid** page, click the **Third** tab.
5. Add the number of enrolled students on the census date of the class to the **Student Census Enrolled** field.
6. Click **Save**.

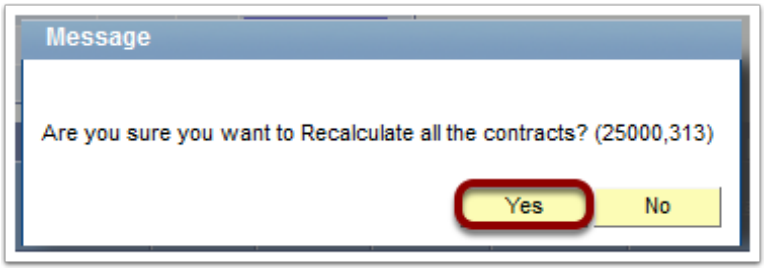


Tip: Did you know you can re-organize the fields you see on the **FWL Grid**? Just click the *Personalize* link and re-order the fields. Want all the most relevant fields on the First Tab, just use the fields you want in the **Column Order** and move them up to the top

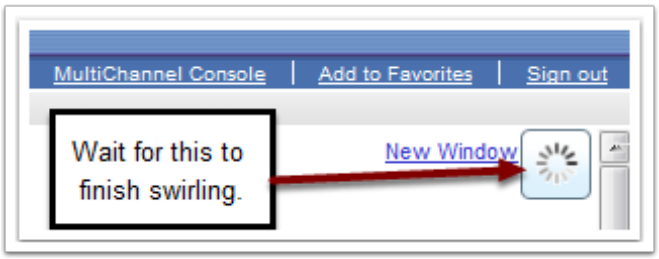
under the *Tab First Tab (frozen)* header. You can also hide fields that aren't important to you. This formatting will be tied to only your login and will follow you wherever you go when you login to ctcLink.

7. Click the **HCM Data** tab, click the **Recalc All** button.
8. At the '*Are you sure you want to Recalculate all the contracts?*' message, click the **Yes** button.

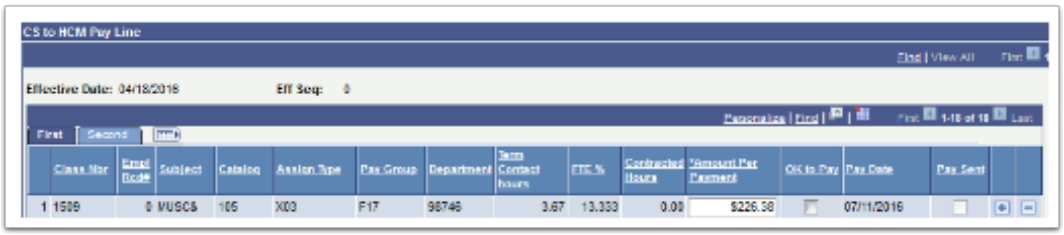




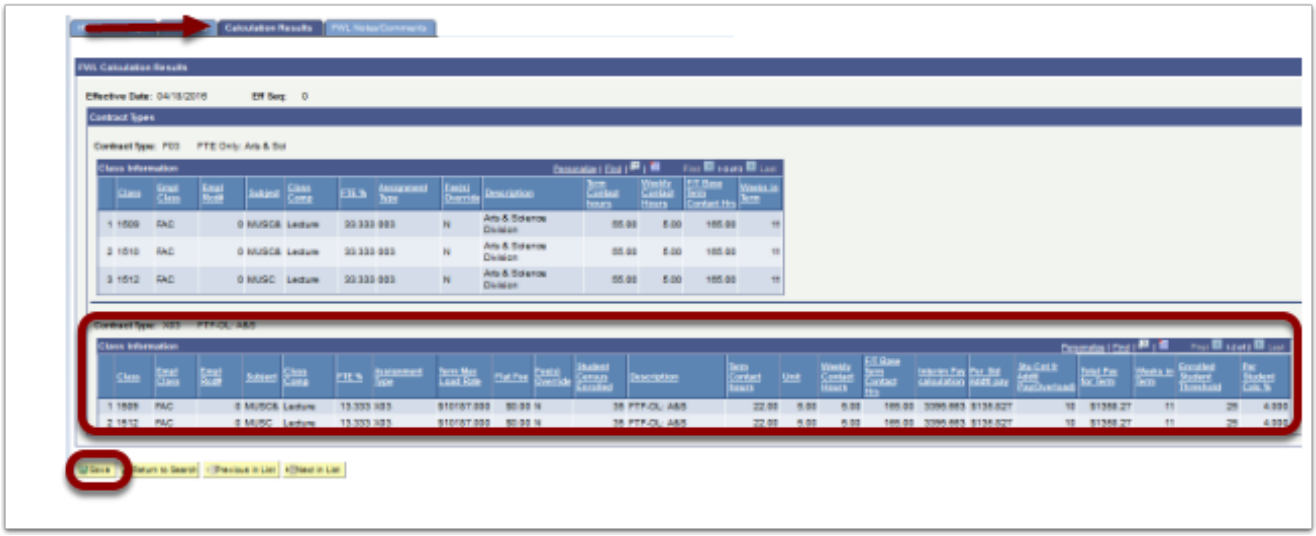
9. The system wait icon will appear in the upper, right hand corner of the screen.



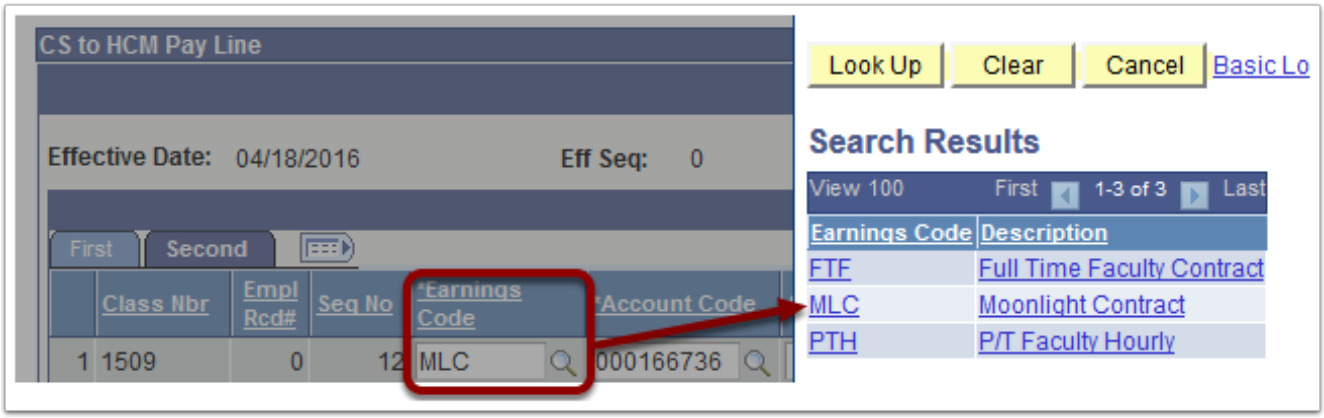
10. When the calculation is complete the screen will refresh and display a draft Pay Line and updated Calculation Results.

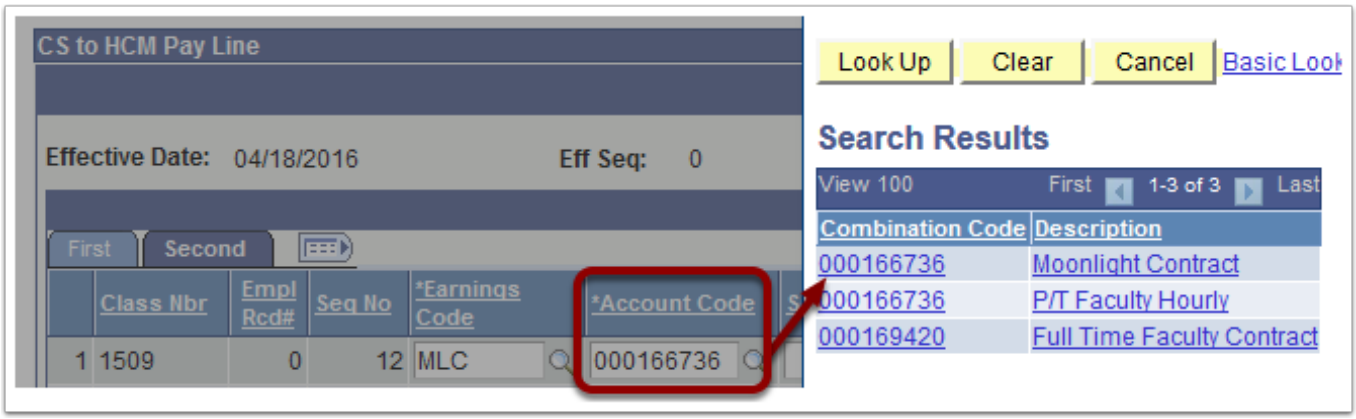


11. Click the Calculation Results tab. Verify the results (FTE%, Pay, Term Contact Hours) are accurate for the student count.



12. If Calculation Results are accurate, click on the HCM Data tab, and verify/update the Pay Line Earnings Code and Account Code (combo code) on the Second tab.



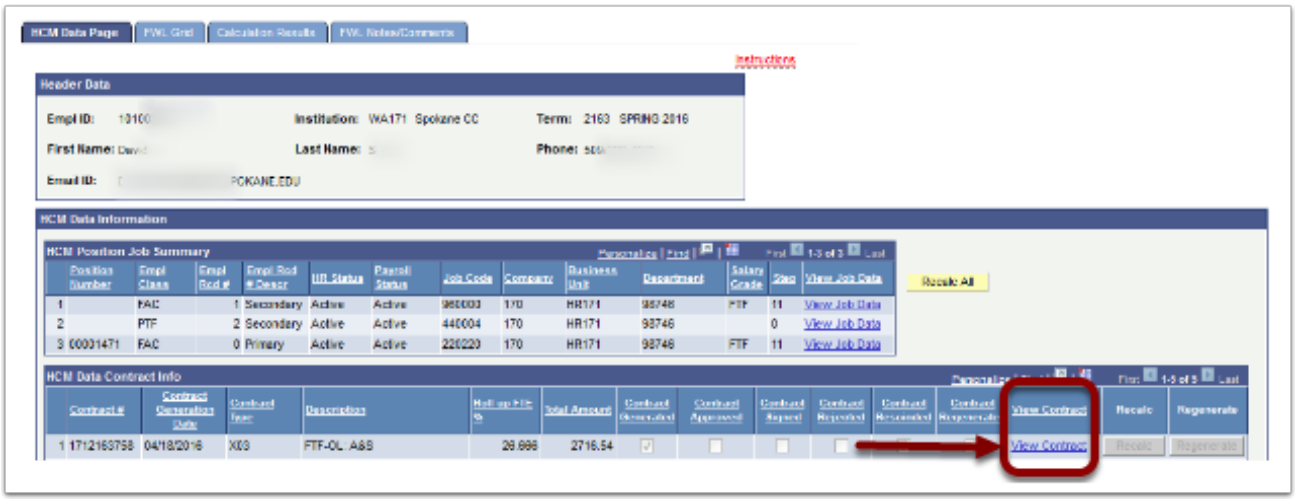


13. After all lines have been updated, click Save.

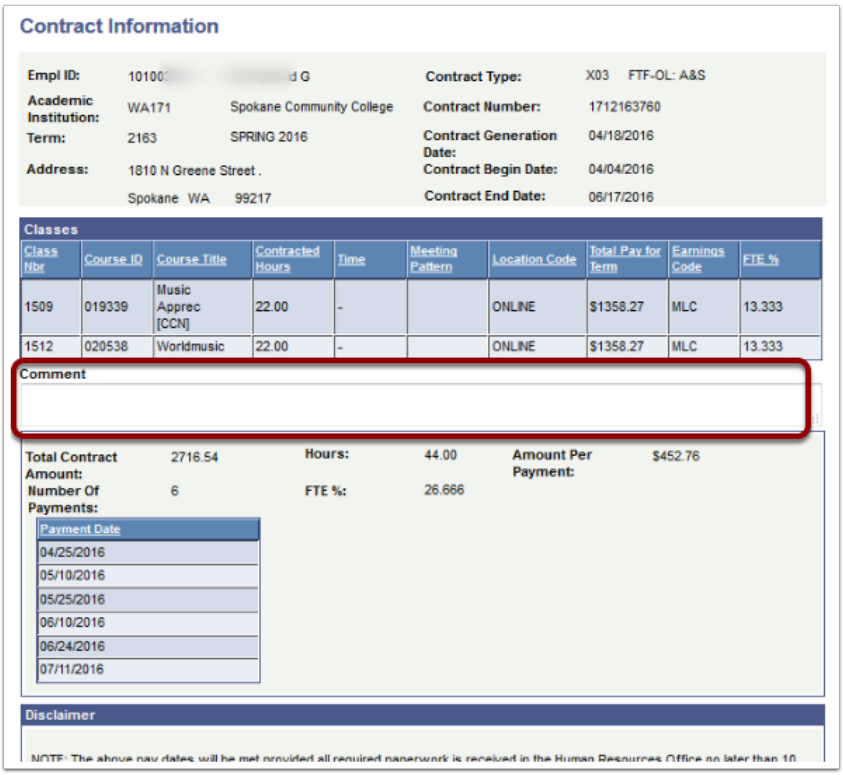
Generation and Review Online Contract

> **Note:** Not sure how to run the FWL Contract Generation Process to generate the online contract/appointment letter? Refer to the Quick Reference Guide - [FWL Contract Generation (Batch)](#).

1. After the contract has been generated, navigate back to Maintain Faculty Workload, on the HCM Data tab, in the HCM Data Contract Info section, click the View Contract link for the Co-Op contract type (e.g. K01) to open the online contract and verify the details.



2. (optional) Add any comments you deem necessary to communicate information for this specific contract to the instructor.
   - If comments added, click **Save** then **Return**.
   - If no comments added, click **Return** to exit the contract view and return to the FWL page.



Contract Information

Empl ID:	10100 d G	Contract Type:	X03 FTF-OL: A&S
Academic Institution:	WA171 Spokane Community College	Contract Number:	1712163760
Term:	2163 SPRING 2016	Contract Generation Date:	04/18/2016
Address:	1810 N Greene Street .	Contract Begin Date:	04/04/2016
	Spokane WA 99217	Contract End Date:	06/17/2016

Classes

Class Nbr	Course ID	Course Title	Contracted Hours	Time	Meeting Pattern	Location Code	Total Pay for Term	Earnings Code	FTE %
1509	019339	Music Apprec [CCN]	22.00	-		ONLINE	$1358.27	MLC	13.333
1512	020538	Worldmusic	22.00	-		ONLINE	$1358.27	MLC	13.333

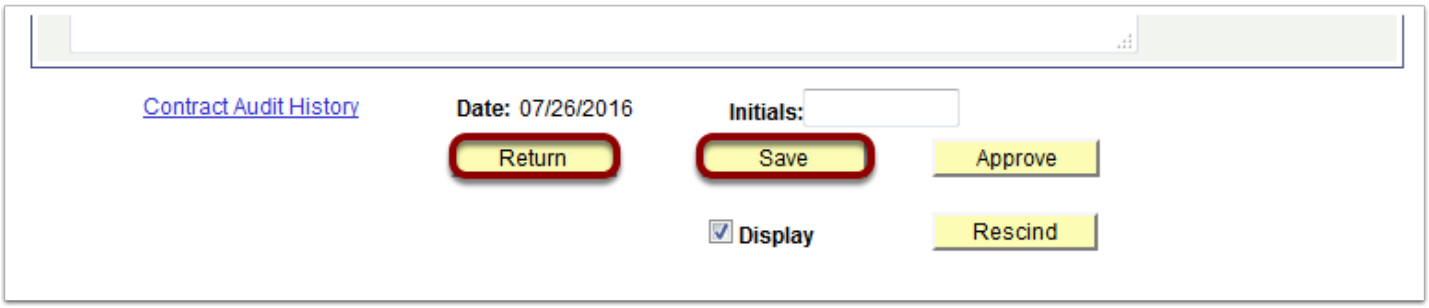
Comment

Total Contract Amount:	2716.54	Hours:	44.00	Amount Per Payment:	$452.76
Number Of Payments:	6	FTE %:	26.666		

Payment Date
04/25/2016
05/10/2016
05/25/2016
06/10/2016
06/24/2016
07/11/2016

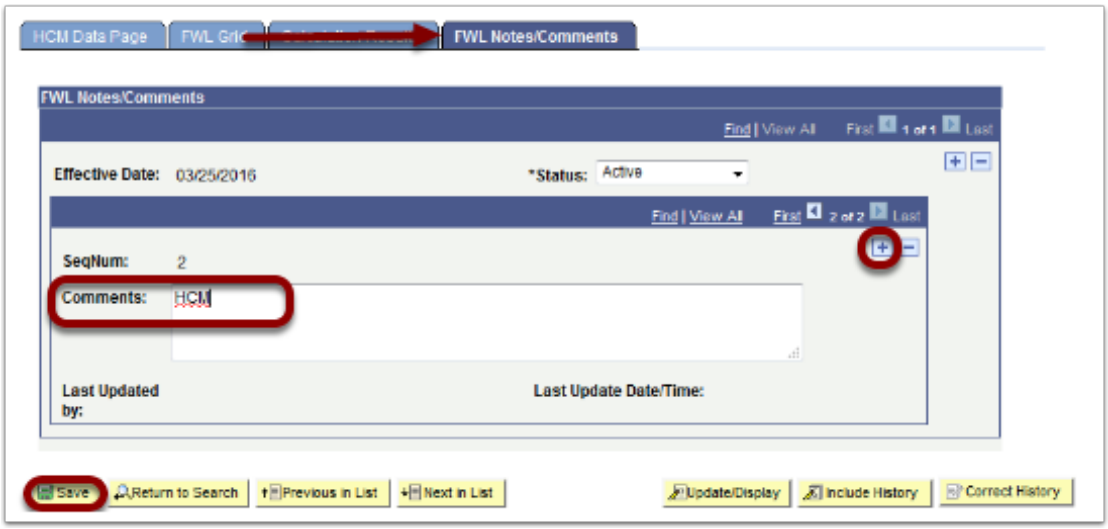
Disclaimer

NOTE: The above pay dates will be met provided all required paperwork is received in the Human Resources Office no later than 10



Add Note for HR Review

1. After the contract is verified and any comments have been added, click the **FWL Notes/ Comments** tab to update the notes with **HCM** in the first three positions. This will cause this contract to appear on the report run by HR noting which contracts area ready for HR review. If entries already exist on this page, click the Plus (+) symbol to add a new Sequence Number to enter a fresh comment.
2. Click **Save**.

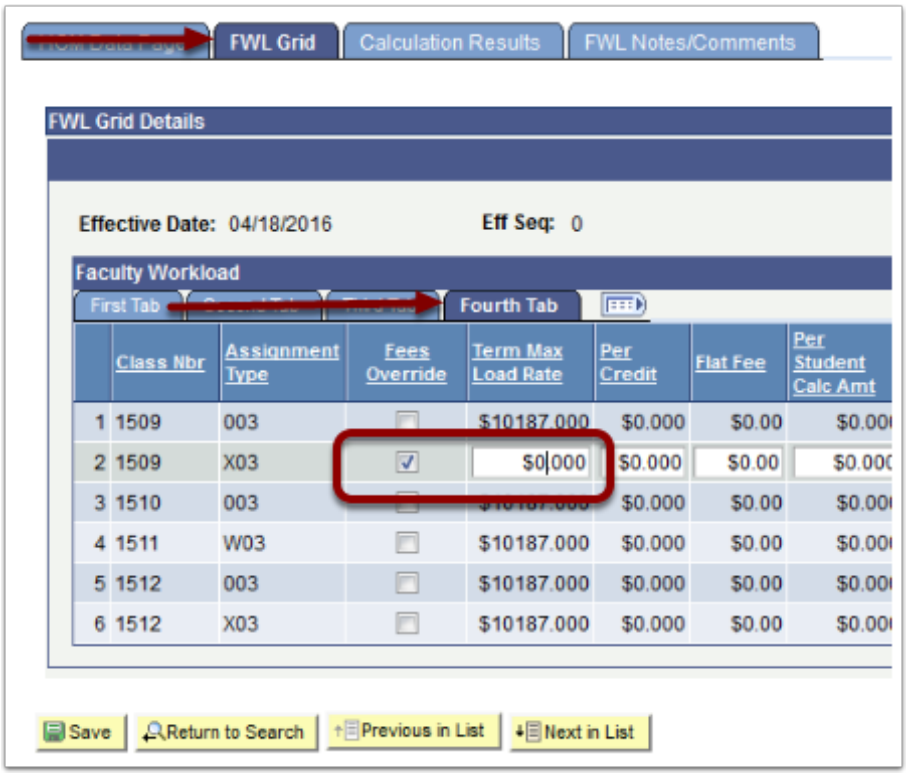


3. Ensure Dean/Administrator approves the contract.
4. Ensure instructor has gone into Faculty Center and signed the contract.

Overload as Regular Load

Looking to calculate the FT Online Overload contract for FTE% Only and no pay?

1. Follow all the steps above in the **Update Maintain Faculty Workload** section, after Step 5, click the **Fourth** tab on the **FWL Grid**.
2. Check the **Fees Override** check box for the FT Online Overload Contract Type (X01-X18).
3. Update the **Term Max Load Rate** to $0.
4. Click **Save**.
5. Click the **HCM Data** tab and click the **Recalc All** button.



Warning: Keep in mind, contracts the generate FTE% only as part of the instructor's Full-Time regular load will have $0 pay in FWL and will not generate an online contract.

Processing Release Time Contracts - SPOKANE ONLY

Purpose: Use this document as a reference for Release Time Assignment Types to an Instructors Term Workload page. Release Time applies to Full Time Faculty only. These instructions assume that the instructor already has regular class load that has been calculated in FWL and that the instructor already has an established, active job and exists in the Instructor/ Advisor Table.

Audience: Class Scheduling or HR Staff

Navigation: Main Menu > Curriculum Management > Instructor/Advisor Information > Instructor Term Workload

Overview

Release Time can be entered for an instructor to receive Moonlight pay, or be added to track which portion of their Full Time load is attributable to Release Time. Since assignment of Release Time is done for a brief period before and after the start of each term, the Assignment Types have been reconfigured with two distinct short descriptions designed to make it easier to remember which Assignment Type is 'payable' and which is 'FTE Only.'

Note: For Spokane the Assignment Type naming convention begins with 2 to 4 characters code that specify the division issuing the contract (noted by '*DDDD'* in the example below)followed by the purpose of the Assignment Type noted in the brackets. The [RF] will have an Assignment Type configuration of $0 in the Term Max Load Rate value, thus generating no pay, but only FTE %. The [RM] will have an Assignment Type configuration of $10187 in the Term Max Load Rate value, thus generating pay.

'*DDDD'* [RF] - *Release Time Full Time Load*

'*DDDD'* [RM] - *Release Time Moonlight*

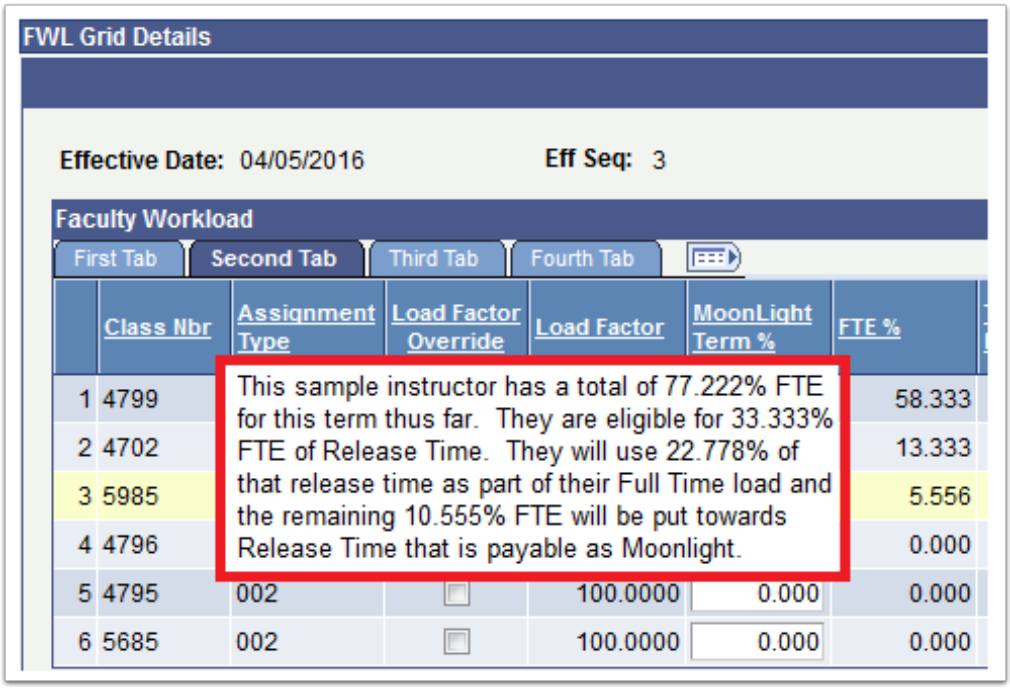
Checklist Steps (Spokane)

- Add Release Time Assignment Type to Instructor Term Workload
- Run FWL Calculation Process to Load the FWL Grid with Release Time row(s)
- Update FWL Grid-Tab 3 for Start/End Date of Release Time
- Update FWL Grid- Tab 4 with number of Contracted Hours to generate the correct FTE % (see table)
- Process a FWL Recalculation
- Review and confirm Calculation Results tab
- If payable Release Time: Update Earn Code and Combo Code on Pay Line
- If payable Release Time: Run FWL Contract Generation
- If payable Release Time: Update Notes/Comments tab with HCM for HR review

- If payable Release Time: Ensure Dean/Administrator approves the contract
- If payable Release Time: Ensure instructor has gone into Faculty Center and signed the contract

Example Instructor Scenario

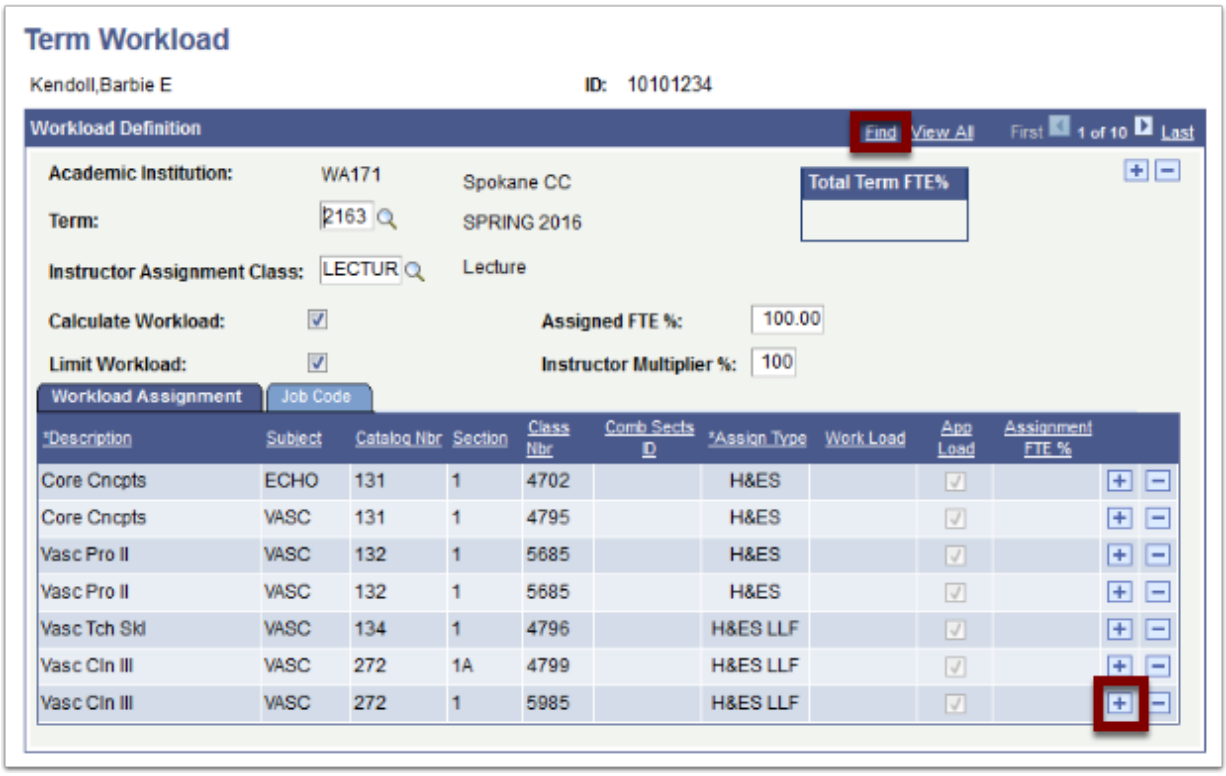
For this QRG we will use a sample instructor who already has part of a regular Full Time load (77.222%) established in FWL.



1. Search for the instructor in the **Instructor Term Workload** page and enter the following:

- **ID:** Empl ID of the instructor.
- **Academic Institution:** Enter value or use lookup.
- **Name:** If EmplID unknown, enter at least the first character of the Last Name.

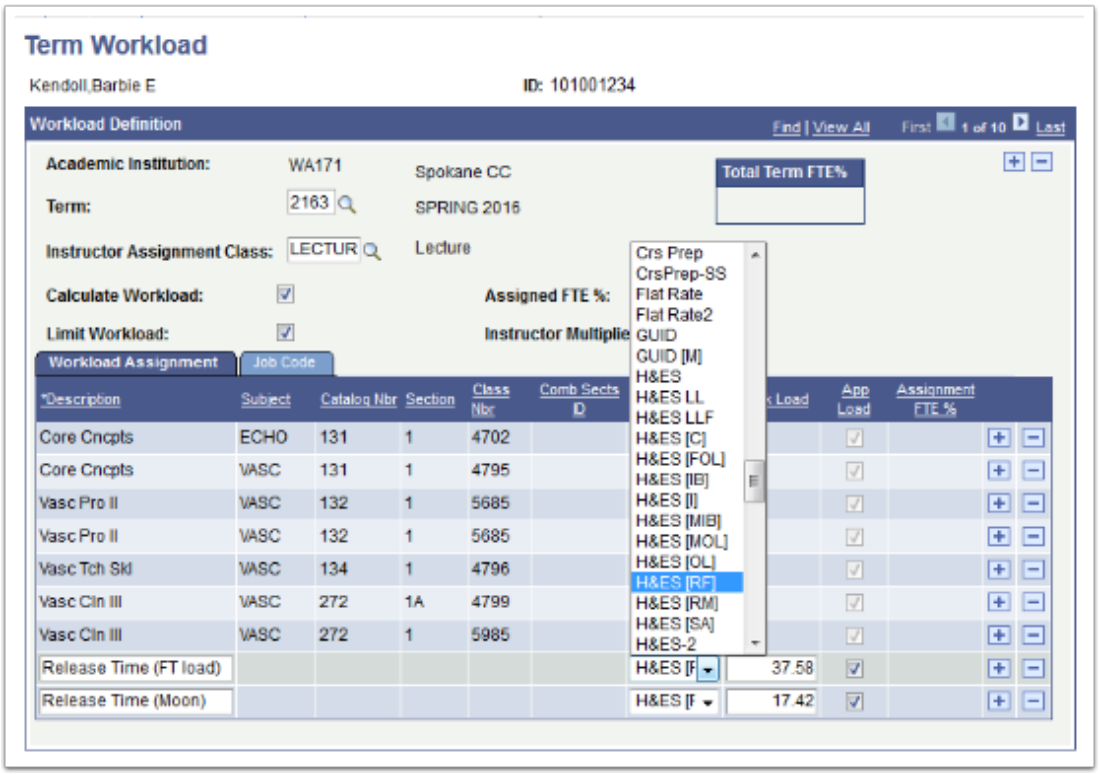
2. The page appears with the latest active Term displayed. If this is not the Term needed, search for the correct Term page by clicking the **Find** link and in the pop-up window enter the Term value, (e.g. 2163)
3. Click **OK**.



4. Once in the correct Term, click the **Add a Row (+)** button to add an additional Workload Assignment. If adding only one Release Time, then only 1 row is needed. If adding multiple rows of Release Time (payable and FTE only), then click the **Add a Row (+)** button to add two additional Workload Assignments.

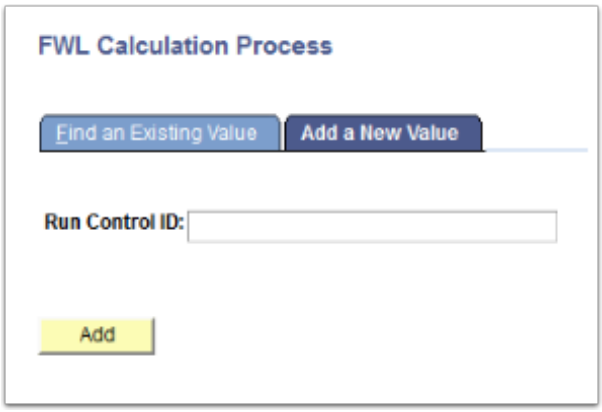
5. Enter the following on the **Workload Assignment** tab:

- **Description**: Title of work being performed, for example Release Time FT Load or Release Time Moonlight. This description is for reference only and does not load into the FWL Grid.
- **Assignment Type**: Click the drop down menu to select a Non-Instructional Assignment Type, for payable Release Time select the division Assignment Type ending in [RM], for full time load Release Time select the division Assignment Type that ends in [RF].
- **Work Load**: (Optional) Hours of work being performed, does not load into the FWL Grid. (see table for hours)
- Click **Save**



> ⚠ NOTE: Do not delete rows added to the Instructor Term Workload page once added to the FWL Grid until the code fix for cancelled or deleted class data is released into Production or you could cause problems recalculating non-instructional time

6. Navigate to the **Maintain Faculty Workload** page for that instructor and term to perform a Recalc All or recalculate the record in batch using the FWL Calculation Process and click the **Search** button, or add a new run control by clicking the **Add a New Value** tab by entering the **Run Control ID** in the open text box, for example *FWLrecalc*
7. A run control is used to allow saving scheduling parameters for a specific batch process for later re-use. Run Control IDs are named at the discretion of the user and can be used again either with the same parameters or edited to reflect the currently applicable scheduling parameters. After the **Run Control ID** is entered click **Add**.

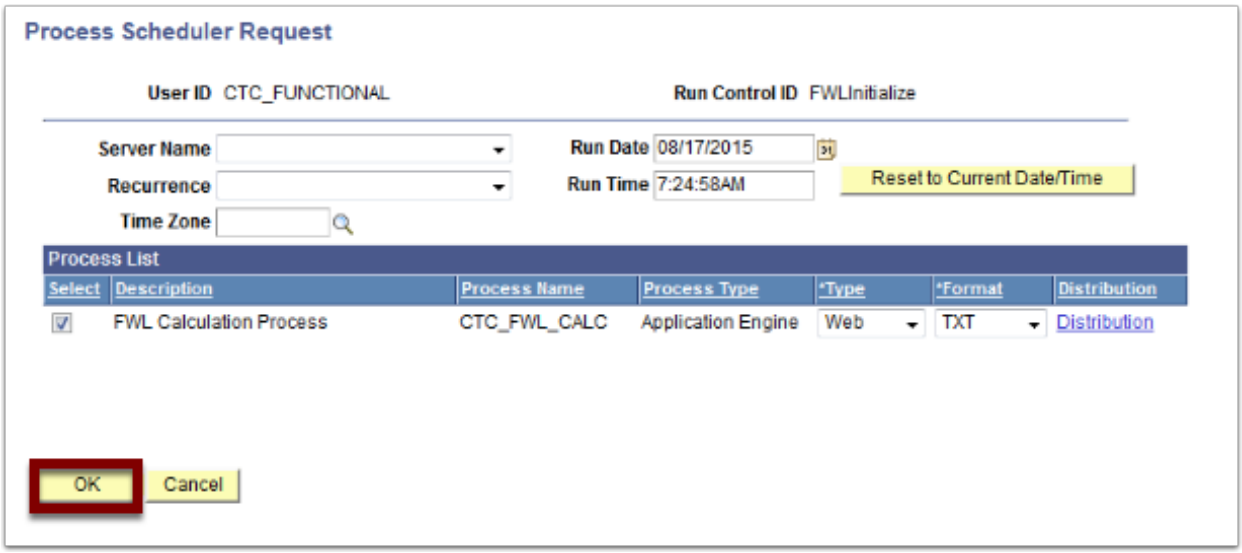


8. On the **FWL Calculation Parameters** page enter the following:

- **Academic Institution:** Enter or use the lookup.
- **Term:** Enter or use the lookup.
- **Empl ID**: Enter the Empl ID for the instructor(s) to be recalculated. Each division initialized their own instructors, therefore it is **NOT recommended** to leave this field blank or risk recalculating all instructors assigned to classes at the institution. Use the plus (+) symbol to add a new row for each additional Empl ID.
- **Recalc for Changes**: Check the box to recalculate if a record already exists in FWL.
- Click the **Run** button.

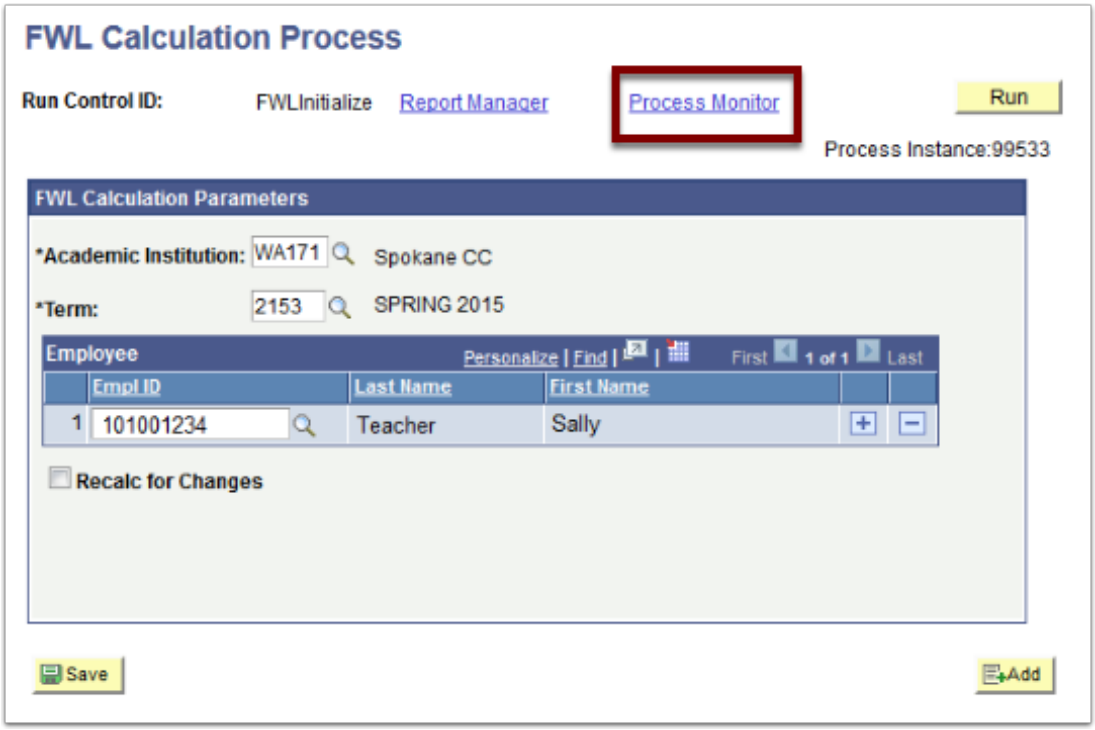
> Note: Instructors missing their **Instructor/Advisor Table** will error when entering their Empl ID.

9. At the **Process Scheduler Request** page click **OK**.

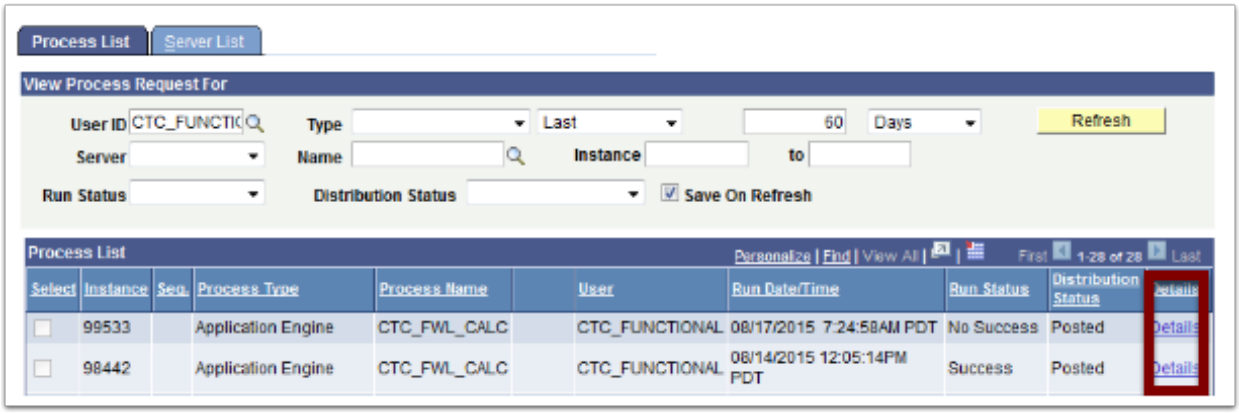


10. Clicking **OK** will launch the batch process and return to the scheduling parameters page.

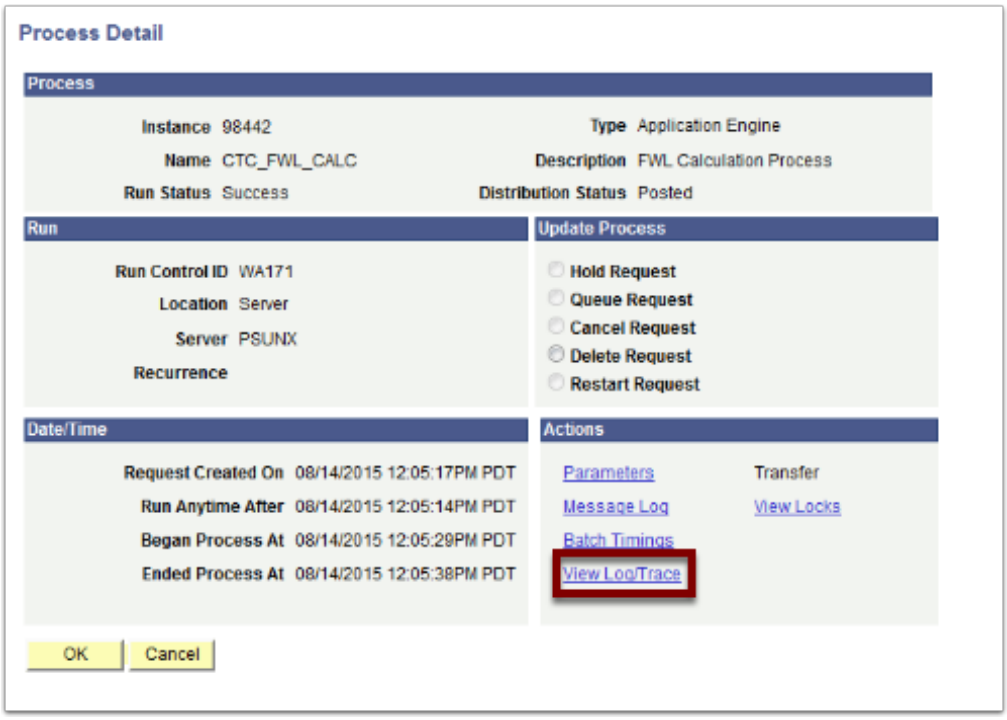
11. Click the **Process Monitor** link to view the status of the batch process and see the log file generated when the process completes:



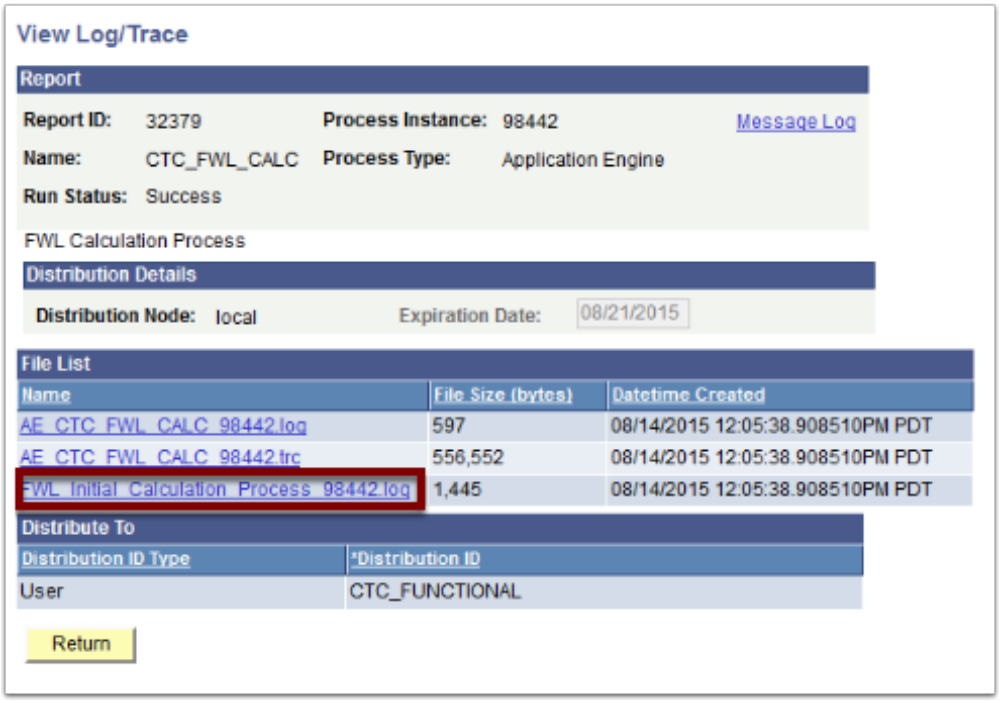
12. In the Process Monitor, the **Run Status** will progress from *Queued* -> *Initialized* -> *Processing* to either *Success* or *No Success*. With a Run Status of *Success* or *No Success* the **Details** link will provide access to batch process log files when the **Distribution Status** changes to *Posted*.
13. Click the **Details** link to view the log files.



14. In the **Process Details** page click the **View Log/Trace** link in the **Actions** section at the bottom of the page.



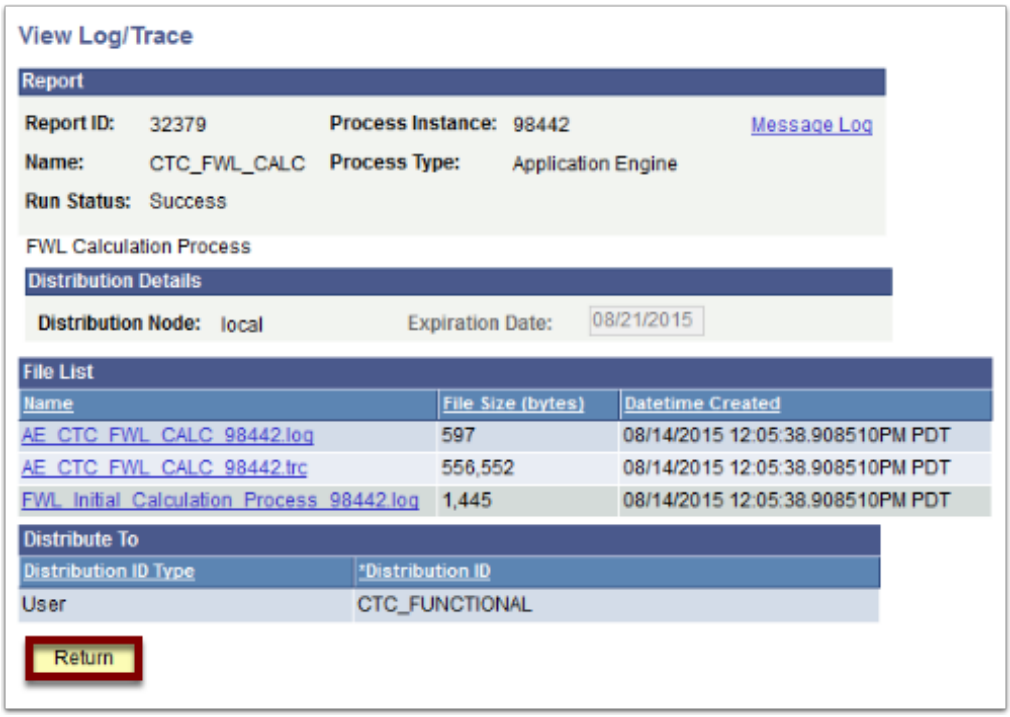
15. In the **View Log/Trace** page, click the **FWL_Initial_Calculation_Process** link.



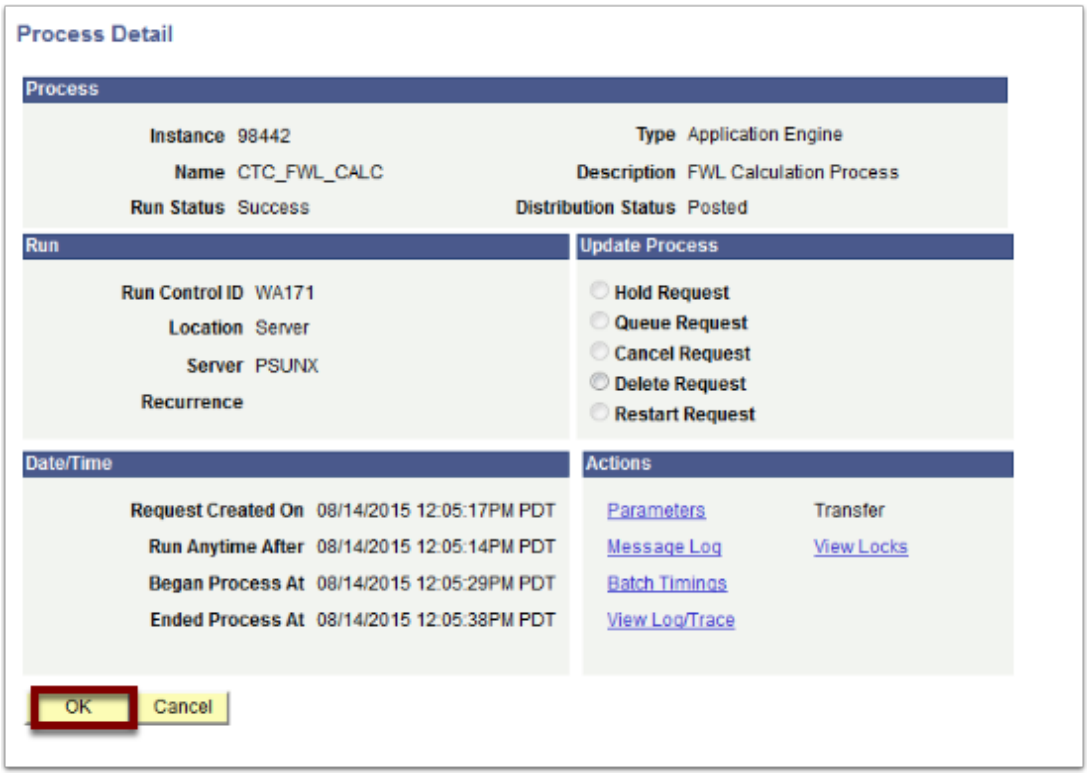
16. The Empl IDs entered in the scheduling parameters will be displayed in the **Process/ Interface Log**. If there were errors in attempting to calculate, the Empl ID will appear in the Calculation Error Log below the scheduling parameters. If the initialization was successful the Empl ID, Assignment Type and Contract Type will appear for each successfully initialized FWL Grid record.

```
*****************************************************************************
                              Process / Interface Log
*****************************************************************************
 Process Instance    : 98442              Operator ID          : CTC_FUNCTIONAL
 Process Name        : CTC_FWL_CALC       Run Date/Time        : 08/14/2015 12:05:29
*****************************************************************************
                               Run Control Parameter
*****************************************************************************
 Run Control ID        (RUN_CNTL_ID)         : WA171
 Academic Institution  (INSTITUTION)         : WA171
 Term                  (STRM)                : 2153
 Recalculate           (CTC_FWL_RECALC)      : N

 Academic Institution  (INSTITUTION)         : WA171
 Empl ID               (EMPLID)              : 101001234

*****************************************************************************
    Calculation Error Log - (If program has faced any error during calculation)
*****************************************************************************
*****************************************************************************
          Initial Calculation Process is completed for below employee(s)
*****************************************************************************
 Emplid: 101001234 - Assignment Type: R02  - Contract Type: R02
 Emplid: 101001234 - Assignment Type: 02R  - Contract Type: R02
```

17. When finished reviewing the log file simply close the tab or window in your browser that contains the log file display to return to the **View Log/Trace** page, then click the **Return** button at the bottom of the page to return to the **Process Detail** page.



18. At the **Process Detail** page click the **OK** button to return to the **Process Monitor** page.



19. Navigate to the **Maintain Faculty Workload** page to update the FWL Grid page, making sure to check the **Correct History** box on the **Search** page.

> If 2 rows were added to the Instructor Term Workload page, then 2 new rows will be added to the FWL Grid page. The class numbers are 5 digits starting with 99999 and incrementing down (99998, 99997, etc.).
>
> Nothing will update to the Pay Line until the FWL Grid is updated with contract begin/end and hours. Note which row is associated to which Assignment Type on the Second Tab. Also, the Term Max Load Rate on the Fourth Tab for the Full Time load will be $0.

HCM Data Page | FWL Grid | Calculation Results | FWL Notes/Comments

FWL Grid Details

Find | View All First 1 of 5 Last

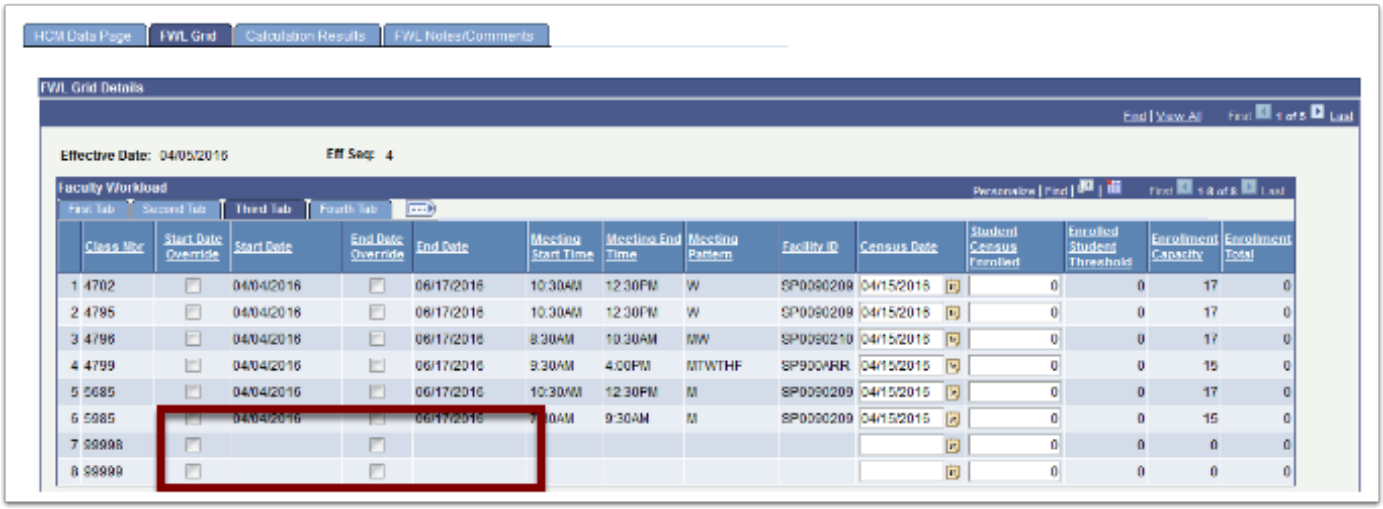
Effective Date: 04/05/2016 Eff Seq: 4

Faculty Workload

Personalize | Find | First 1-8 of 8 Last

First Tab | Second Tab | Third Tab | Fourth Tab

	Class Nbr	Assignment Type	Load Factor Override	Load Factor	MoonLight Term %	FTE %	Total Term FTE %	Class Final Exam	Combined Sections	Associated Class	Empl Rcd Override	Empl Rcd Nbr	Department
1	4702	002		100.0000	0.000	13.333	0.00			1		0	98732
2	4795	002		100.0000	0.000	0.000	0.00			1		0	98732
3	4796	02F		100.0000	0.000	0.000	0.00			1		0	98732
4	4799	02F	✓	70.0000	0.000	58.333	0.00			1		0	98732
5	5685	002		100.0000	0.000	0.000	0.00			1		0	98732
6	5985	02F		50.0000	0.000	5.556	0.00			1		0	98732
7	99998	02R		0.0000	0.000	0.000	0.00			0		0	98732
8	99999	R02		0.0000	0.000	0.000	0.00			0		0	98732



HCM Data Page | FWL Grid | Calculation Results | FWL Notes/Comments

FWL Grid Details

Find | View All First 1 of 5 Last

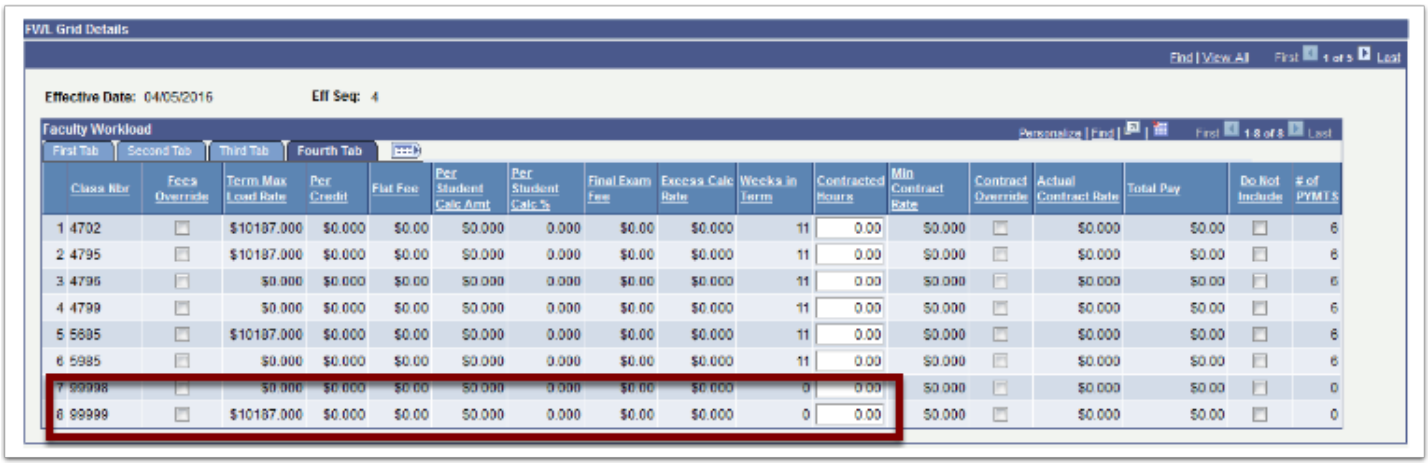
Effective Date: 04/05/2016 Eff Seq: 4

Faculty Workload

Personalize | Find | First 1-8 of 8 Last

First Tab | Second Tab | Third Tab | Fourth Tab

	Class Nbr	Start Date Override	Start Date	End Date Override	End Date	Meeting Start Time	Meeting End Time	Meeting Pattern	Facility ID	Census Date	Student Census Enrolled	Enrolled Student Threshold	Enrollment Capacity	Enrollment Total
1	4702		04/04/2016		06/17/2016	10:30AM	12:30PM	W	SP0090209	04/15/2015	0	0	17	0
2	4795		04/04/2016		06/17/2016	10:30AM	12:30PM	W	SP0090209	04/15/2015	0	0	17	0
3	4796		04/04/2016		06/17/2016	8:30AM	10:30AM	MW	SP0090210	04/15/2015	0	0	17	0
4	4799		04/04/2016		06/17/2016	9:30AM	4:00PM	MTWTHF	SP900ARR	04/15/2015	0	0	15	0
5	5685		04/04/2016		06/17/2016	10:30AM	12:30PM	M	SP0090209	04/15/2015	0	0	17	0
6	5985		04/04/2016		06/17/2016	7:30AM	9:30AM	M	SP0090209	04/15/2015	0	0	15	0
7	99998										0	0	0	0
8	99999										0	0	0	0



FWL Grid Details

Find | View All First 1 of 5 Last

Effective Date: 04/05/2016 Eff Seq: 4

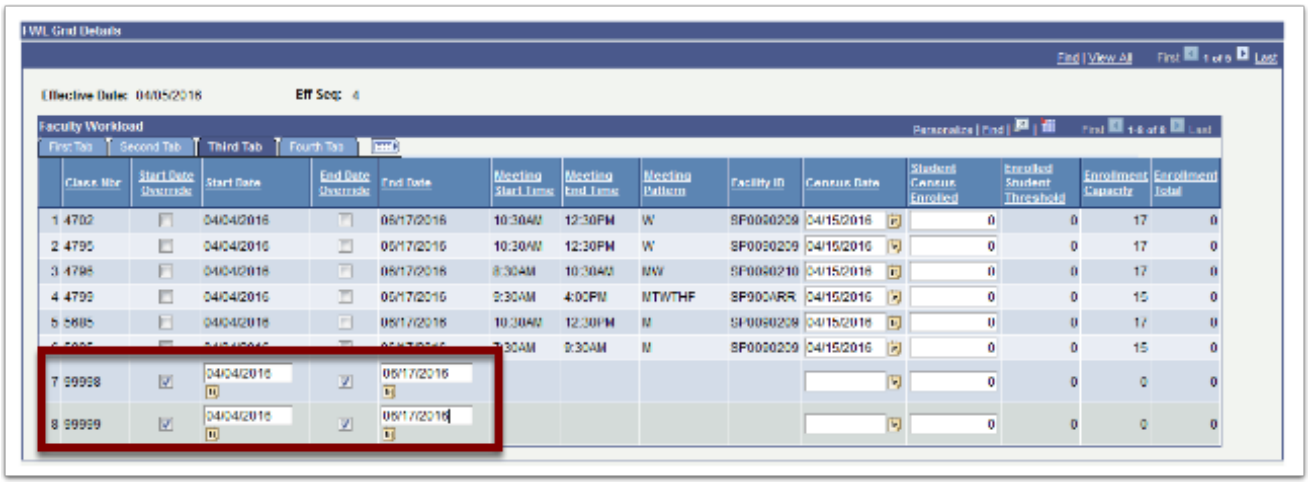
Faculty Workload

Personalize | Find | First 1-8 of 8 Last

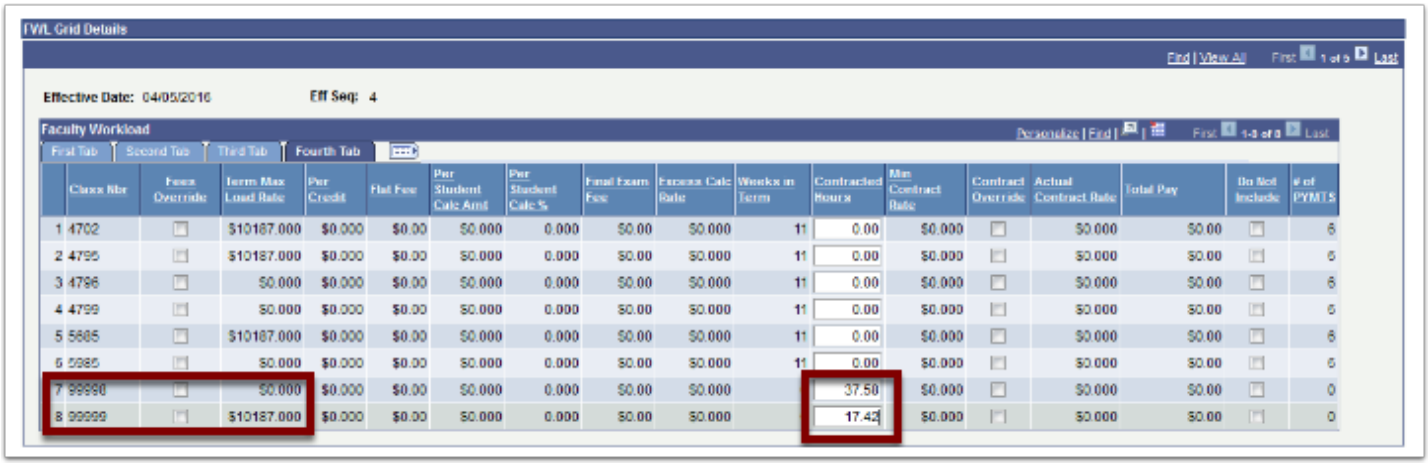
First Tab | Second Tab | Third Tab | Fourth Tab

	Class Nbr	Fees Override	Term Max Load Rate	Per Credit	Flat Fee	Per Student Calc Amt	Per Student Calc %	Final Exam Fee	Excess Calc Rate	Weeks in Term	Contracted Hours	Min Contract Rate	Contract Override	Actual Contract Rate	Total Pay	Do Not Include	# of PYMTS
1	4702		$10187.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000		$0.000	$0.00		6
2	4795		$10187.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000		$0.000	$0.00		6
3	4796		$0.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000		$0.000	$0.00		6
4	4799		$0.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000		$0.000	$0.00		6
5	5685		$10187.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000		$0.000	$0.00		6
6	5985		$0.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	11	0.00	$0.000		$0.000	$0.00		6
7	99998		$0.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	0	0.00	$0.000		$0.000	$0.00		0
8	99999		$10187.000	$0.000	$0.00	$0.000	0.000	$0.00	$0.000	0	0.00	$0.000		$0.000	$0.00		0

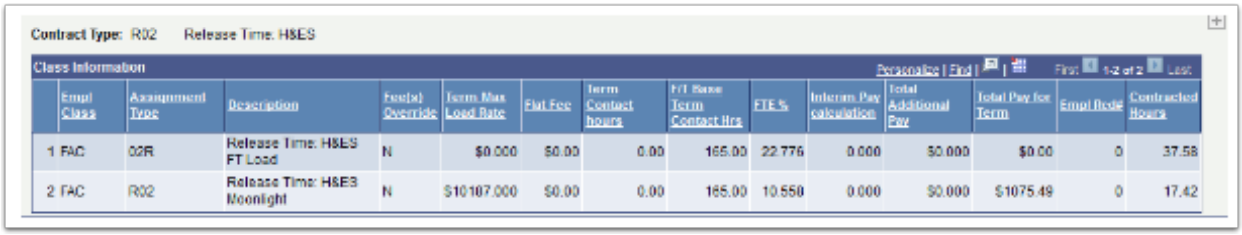
20. On the Third Tab on the **FWL Grid** page, update the begin and end date by clicking the **Start Date** and **End Date.**
21. Override checkboxes and entering the appropriate dates, making sure that the Correct History is turned on.



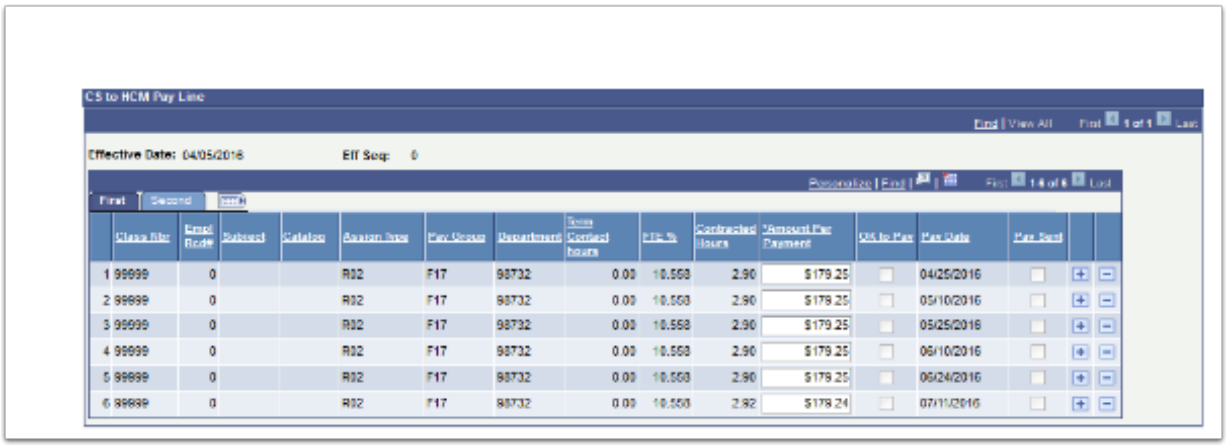
22. On the **Fourth Tab** on the **FWL Grid** Page, enter the **Contract Hours**. This is the total number of hours associated to this contract for the term. Use the table at the end of this document to determine the correct number of hours to equate to the desired FTE%.
23. After entering data in all necessary fields click **Save**.



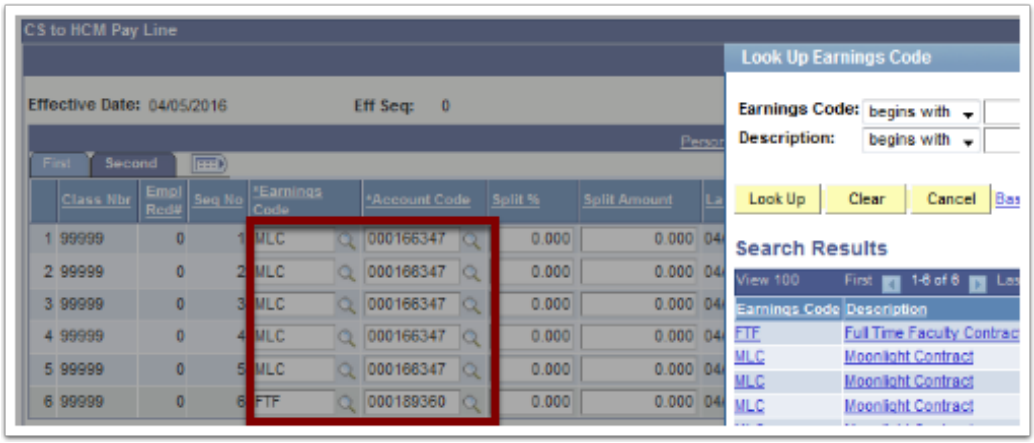
24. Click the **HCM Data Page** tab and click **Recalc All** button.
25. View the **FWL Calculation Results** tab to view the contract calculation results.



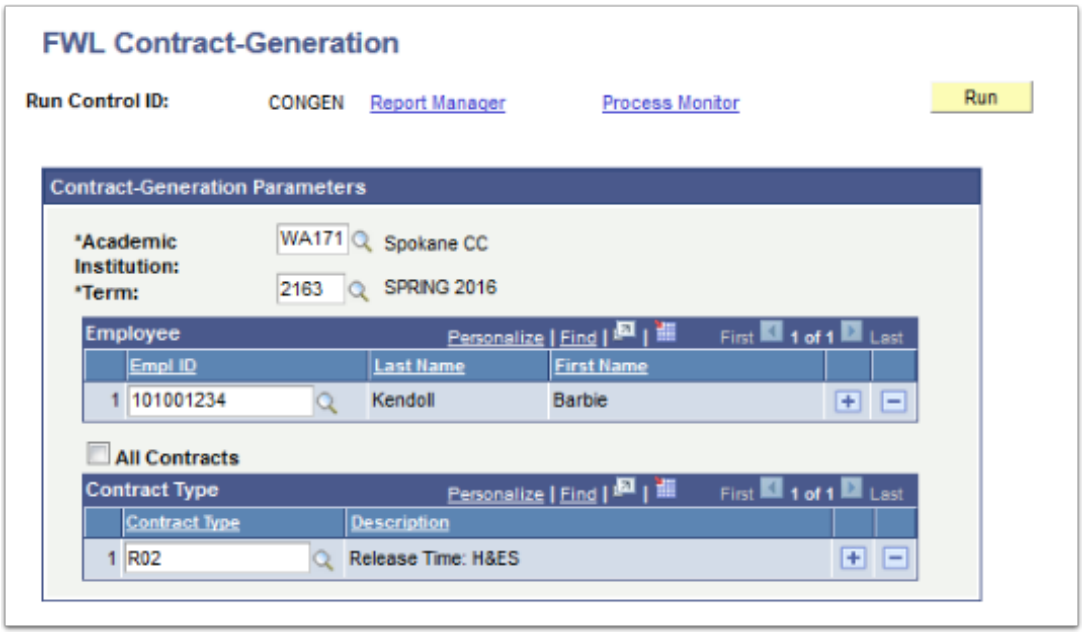
26. Review the **HCM to CS Pay Line** on the **HCM Data** Page to confirm the accuracy of the draft **Pay Line**.



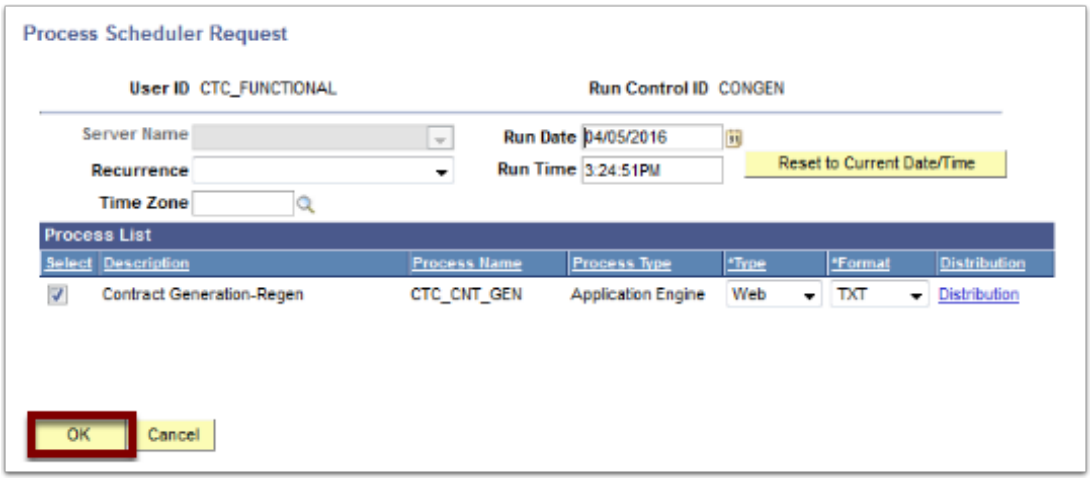
27. Ensure that the **Earn Code** and **Combo Code** on the Second tab reflect the Moonlight (**MLC**) Assignment Type BEFORE generating the electronic contract for HR and Dean/Administrator approval.



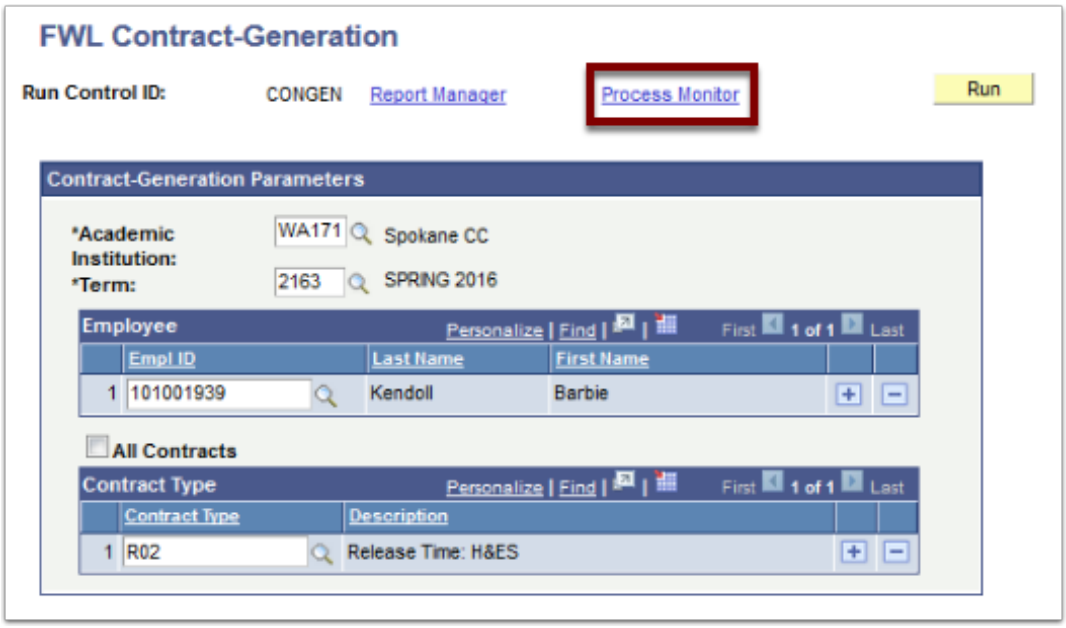
28. Once the draft **Pay Line** is accurate and has the correct **Earn Code** and **Combo Code** the electronic contract can be generated.
29. Navigate to the FWL Contract Generation process and search for an existing Run Control, or add a new one. If new, enter the following:
    - **Academic Institution:** Enter or use the lookup.
    - **Term:** Enter or use the lookup.
    - **Empl ID**: Enter the Empl ID for the instructor(s) to be recalculated.
    - Uncheck the All Contracts check box.
    - **Contract Type:** Enter or use the lookup.
    - Click **SAVE.**
    - Click **Run.**

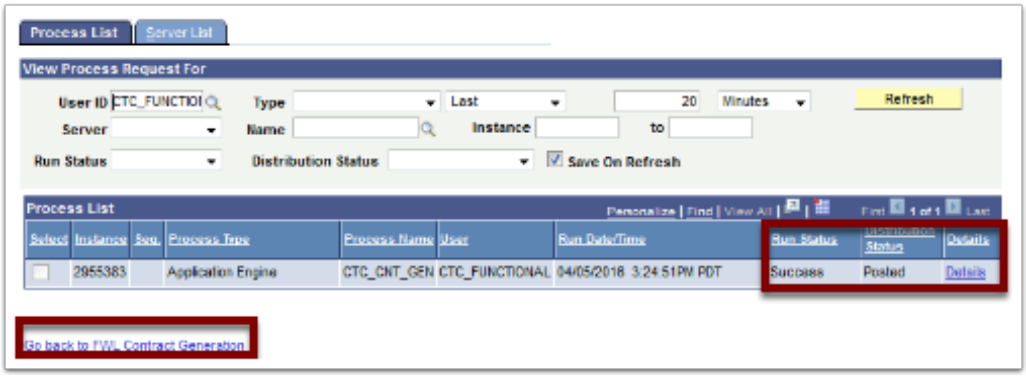


30. At the **Process Scheduler Request** page, click **OK**.

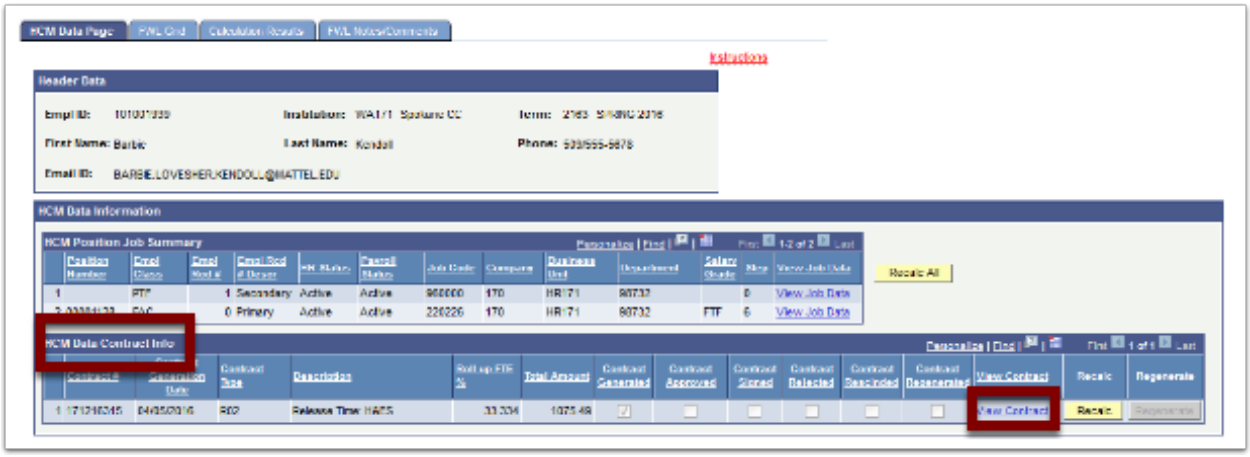


31. Once launched, the page returns to the **Run Control**. Click the **Process Monitor** link to monitor process run status and when complete, view details. Once process shows **Success**, use the link '**Go Back to FWL Contract Generation**' to return to the **Run Control** page, or simply navigate back to the **Maintain Faculty Workload** page.



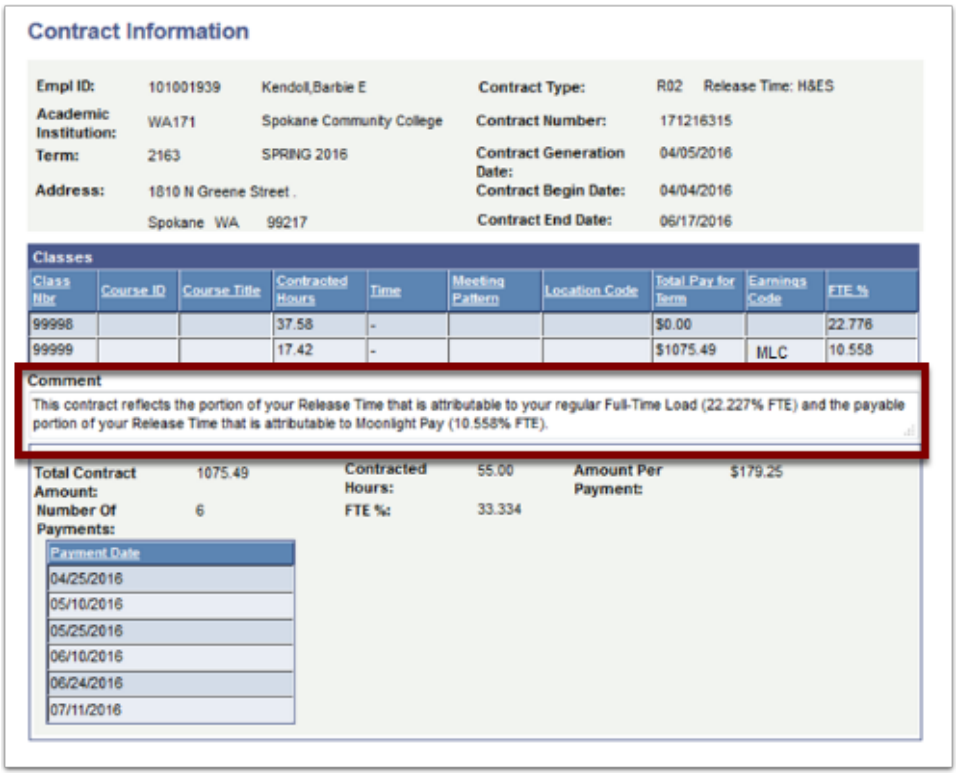


32. When the process completes, navigate back to the **Maintain Faculty Workload** page and view the electronic **Contract.**
33. To review the electronic **Contract** in the **Maintain Faculty Workload** page, in the **Contract Data Info** section, click the **View Contract** link.



34. Once in the contract, you may decide to add commentary to the contract highlighting which portion of the contract is payable and which portion is part of their regular load.

35. Click the **View Contract** link, enter the desired commentary I the **Comment** box.



Contract Information

Empl ID:	101001939	Kendoll,Barbie E	Contract Type:	R02	Release Time: H&ES
Academic Institution:	WA171	Spokane Community College	Contract Number:	171216315	
Term:	2163	SPRING 2016	Contract Generation Date:	04/05/2016	
Address:	1810 N Greene Street .		Contract Begin Date:	04/04/2016	
	Spokane WA 99217		Contract End Date:	06/17/2016	

Classes

Class Nbr	Course ID	Course Title	Contracted Hours	Time	Meeting Pattern	Location Code	Total Pay for Term	Earnings Code	FTE %
99998			37.58	-			$0.00		22.776
99999			17.42	-			$1075.49	MLC	10.558

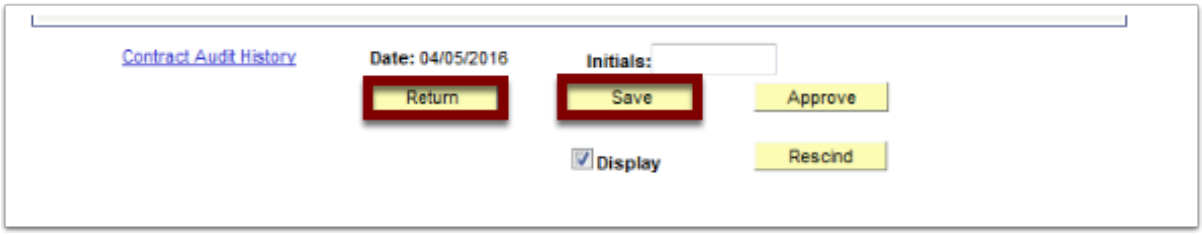
Comment

This contract reflects the portion of your Release Time that is attributable to your regular Full-Time Load (22.227% FTE) and the payable portion of your Release Time that is attributable to Moonlight Pay (10.558% FTE).

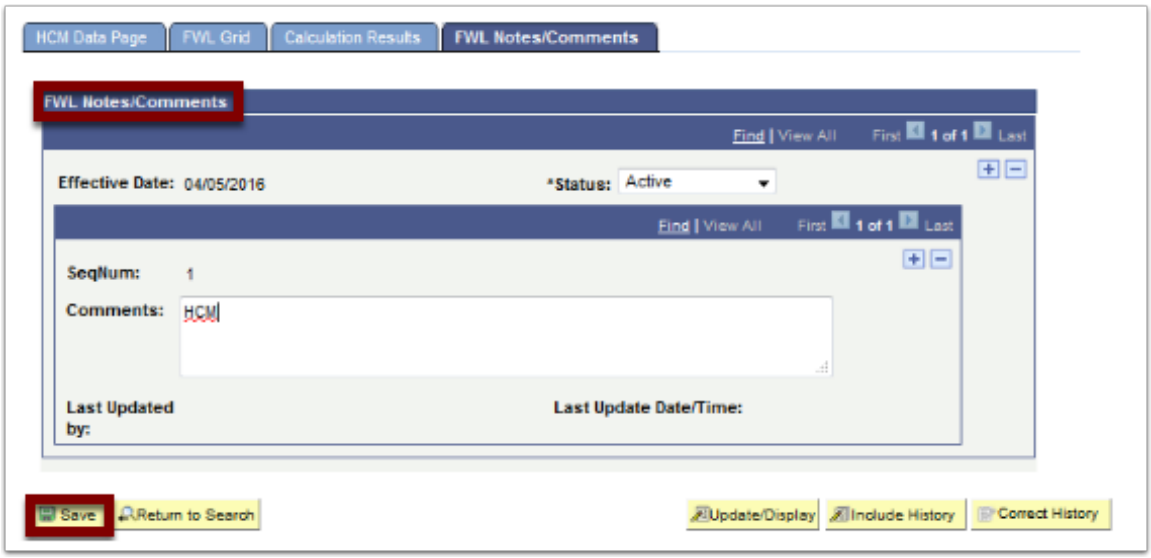
Total Contract Amount:	1075.49	Contracted Hours:	55.00	Amount Per Payment:	$179.25
Number Of Payments:	6	FTE %:	33.334		

Payment Date
04/25/2016
05/10/2016
05/25/2016
06/10/2016
06/24/2016
07/11/2016

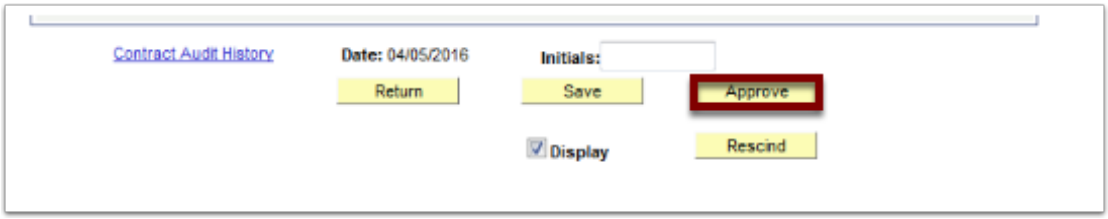
> **Note:** If commentary language is added, click the **SAVE** button at the bottom of the page, if not, simply click the **RETURN** button to return to the Maintain Faculty Workload page.



36. Notify HR that the employee is ready to have their online contract reviewed for their approval by entering HCM in the **Notes/Comments** tab and clicking the **SAVE** button.



37. After HR reviews and approves the electronic Contract, notify the Dean/Administrator that they need to Approve the contract by navigating to the **Maintain Faculty Workload** page, following the **View Contract** link and clicking the **APPROVE** button.



38. After the Dean/Administrator approves, the instructor must sign the electronic Contract by entering their initials.

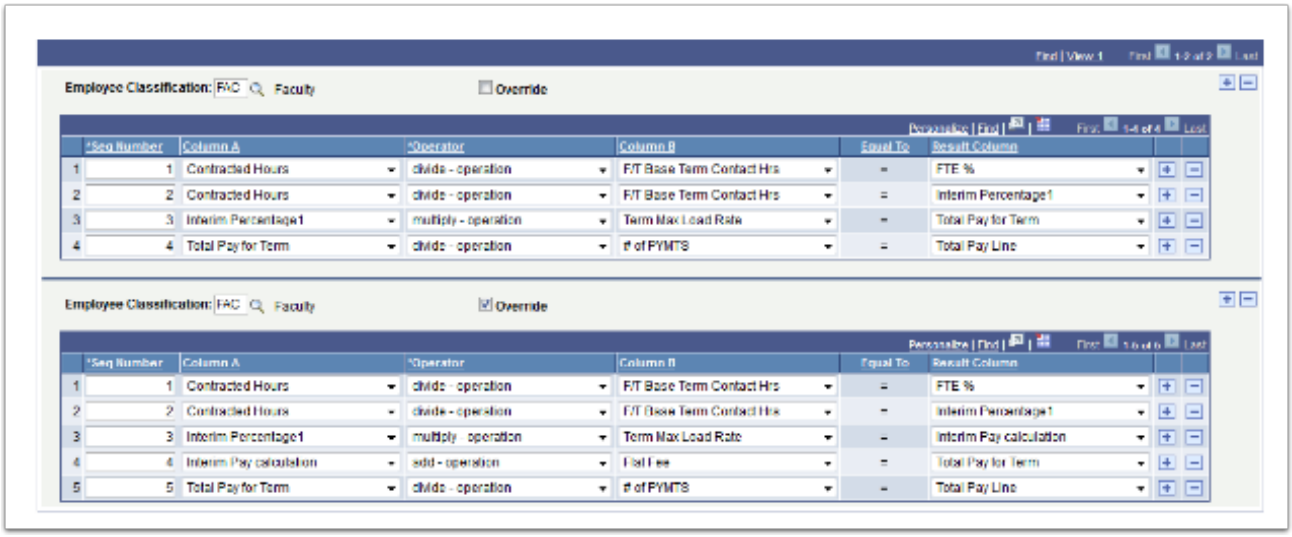
FTE% to Hours Table

Target FTE%	Default FT BASE	Hours Entered in Contract Hours field on FWL Grid
33.333%	165	55.00
30.000%	165	49.50
26.667%	165	44.00
20.000%	165	33.00
16.667%	165	27.50
15.000%	165	24.75
13.333%	165	22.00
11.111%	165	18.33
10.000%	165	16.50
6.667%	165	11.00

Note: If you don't see your desired FTE% above, simply multiply 165 by the desired FTE% to get the necessary hours. For example 165 x .05 (5%) = 8.25 hours.

Background Formula

In order to understand the formula behind the Release Time contracts the screen shot below details the calculation that occurs. The college enters the Contracted Hours in the FWL Grid, which is divided by the FT Base (165) to generate the FTE % that displays on the contract, Pay Line and is pushed to HCM. The display FTE% has 3 decimal places. For the calculation of pay a second, 6 decimal percentage value is also generated. This ensures that when multiplying the FTE% against the Term Max Load Rate that no pennies are lost due to rounding, resulting in a more accurate Total Pay for Term. This Total Pay for Term is then divided by the number of payments to generate the amount to be paid per pay date on the Pay Line. The number of payments are determined by the begin and end date entered on the FWL Grid.



Reference Navigation

Main Menu → Curriculum Management → Instructor/Advisor Information → Instructor Term Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Calculation Process

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Contract Generation

Processing Co-Op Contracts - SPOKANE ONLY

Purpose: Use this document as a reference for how to process Co-operative Education contracts at Community Colleges of Spokane.

Audience: Class Scheduling Staff

Navigation:

Main Menu → Curriculum Management → Schedule of Classes → Maintain Schedule of Classes

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Calculation Process

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Transaction → Maintain Faculty Workload

Main Menu → Curriculum Management → CTC Custom → Faculty Workload → Faculty Workload Processing → FWL Contract Generation

Overview

Calculating Cooperative Eduction (Co-Op) contracts (K01-K17, KF1) applies to both Co-Op Experiences (Clinical) and Co-Op Seminars (Lecture). At Community Colleges of Spokane instructor pay for Co-Op classes is based on the number of students enrolled, divided by the max of 60. For example, 10 students enrolled divided by 60 student max equates to 16.667% FTE. That FTE% is then multiplied against the standard Term Max Load Rate, the maximum amount an adjunct faculty could be paid if working 100% FTE. The resulting value is the amount of pay the instructor is eligible for. The Term Contact Hours of the contract is calculated by multiplying the FTE% by the total hours for workload category A (165 hours). The Load Factor in the Schedule of Class is not a factor in Co-Op pay.

Note: For Spokane the Assignment Type naming convention begins with 2 to 4 characters code that specify the division issuing the contract (noted by '*DDDD*' in the example below) for Co-Op contracts the Assignment Type is followed by [C]. If a division has a contract calculation created to calculate Co-Op as part of regular Full Time load then an Assignment Type will be visible in Schedule of Class that is followed by [CO], for Co-Op - FTE Only.

'*DDDD*' [C] - Co-Op (payable)

'DDDD' [CO] - Co-Op (FTE Only)

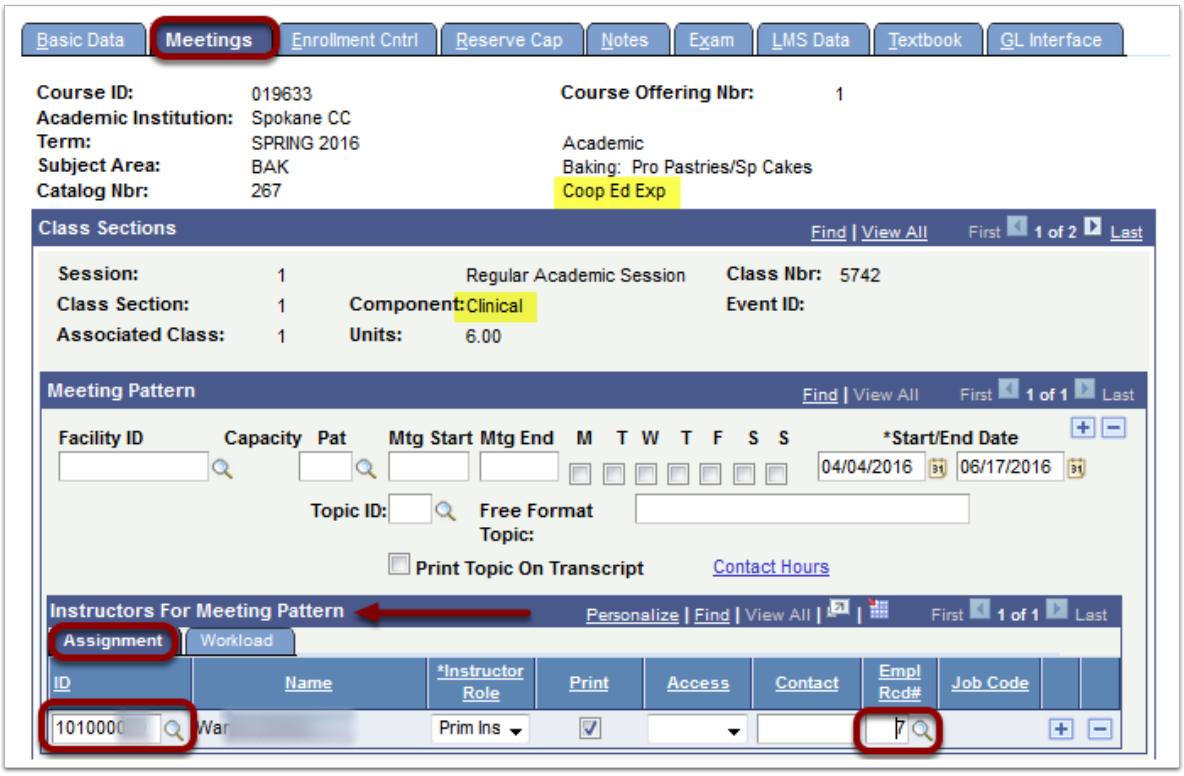
Checklist Steps for Co-Op Contracts (Spokane Only)

- Confirm the instructor exists on the Instructor/Adviser Table for the institution with an Effective Date of 01/01/1901.
- Add the Instructor to class in Schedule of Class once, using the Co-Op Assignment Type, using the plus (+) symbol to add a new row if needed:
  - Ensure that the Empl Record Number is that of the correct job record.
    - If hired after Term start, use system default of 0 and override the Empl Rcd Nbr in the FWL Grid, adjusting start date and prorating Term Max Load Rate if needed.
  - Note: Load Factor is left at 100%, as it is not a factor in Co-Op calculations.
- Run FWL Calculation Process to Load the FWL Grid.
- Update FWL Grid-Tab 3 to enter the number of students enrolled.
- Click Save.
- Process a FWL Recalculation.
- Review and confirm Calculation Results tab.
- Review the Pay Line, if needed, update Earn Code and Combo Code.
- Run FWL Contract Generation.
- Verify the online contract/appointment letter.
- Update Notes/Comments tab with HCM for HR review.
- Ensure Dean/Administrator approves the contract.
- Ensure instructor has gone into Faculty Center and signed the contract.

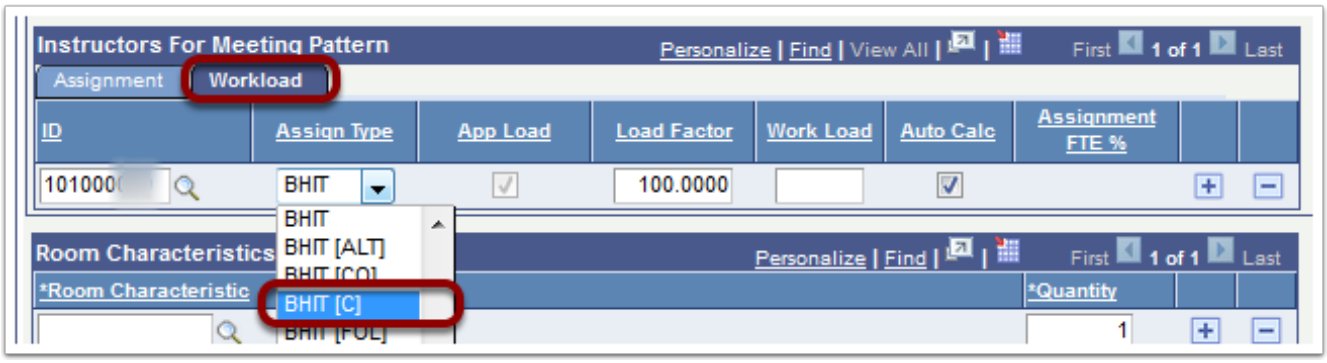
> **Note:** To confirm an instructor has a record on the Instructor/Adviser Table, refer to the Quick Reference Guide - Adding and Instructor to the Instructor/Adviser Table.

Add Instructor Assignment in Schedule of Class

1. In **Schedule of Class**, use the search feature to open the **Co-Op** class and click on the **Meetings** tab.
2. In the **Instructors for Meeting Pattern** section, on the **Assignment** tab, enter the **Empl ID** of the instructor or use the Look Up to search by name.
3. Also on the **Assignment** tab, enter the **Empl Rcd#** or use the Look Up.
4. Click the **Workload** tab.



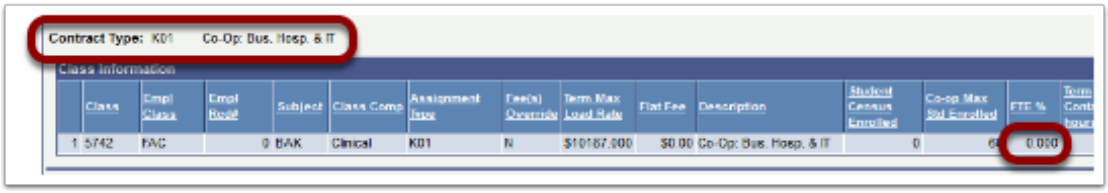
5. On the **Workload** tab, in the **Assign Type** field, click the drop-down menu and select the appropriate Assignment Type value for your division with the [C] for Co-Op (unless processing for Full Time Faculty [FAC] at regular load [FTE Only] - then use [CO] Assignment Type if configured for your division).
6. Load Factor can be ignored as it is not used in the calculation.
7. Click **Save**.



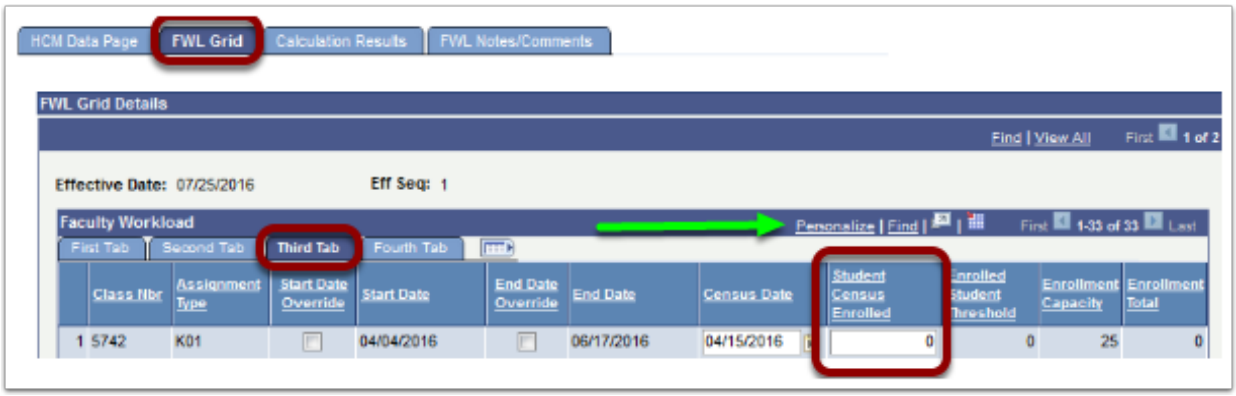
Note: Not sure how to run the FWL Calculation Process to load the FWL Grid? Refer to the Quick Reference Guide - FWL Calculation Process (Batch).

Update Maintain Faculty Workload

1. After the **FWL Calculation Process** has been run to load the **FWL Grid**, navigate to the **Maintain Faculty Workload** page.
2. On the **Calculation Result** page. The **Contract Type** for *Co-Op* should appear with 0.00 FTE% and $0 Total Pay. In order to generate FTE % and pay, the number of enrolled students on the 10th day must be entered into the **FWL Grid**.
   - If the calculation result doesn't appear check the following:
     - Is the Empl Rcd Nbr entered in Schedule of Class for an active FAC or PTF job?
     - Is the Subject and Component configured for the Co-Op contract or is the first time this combination has been offered?

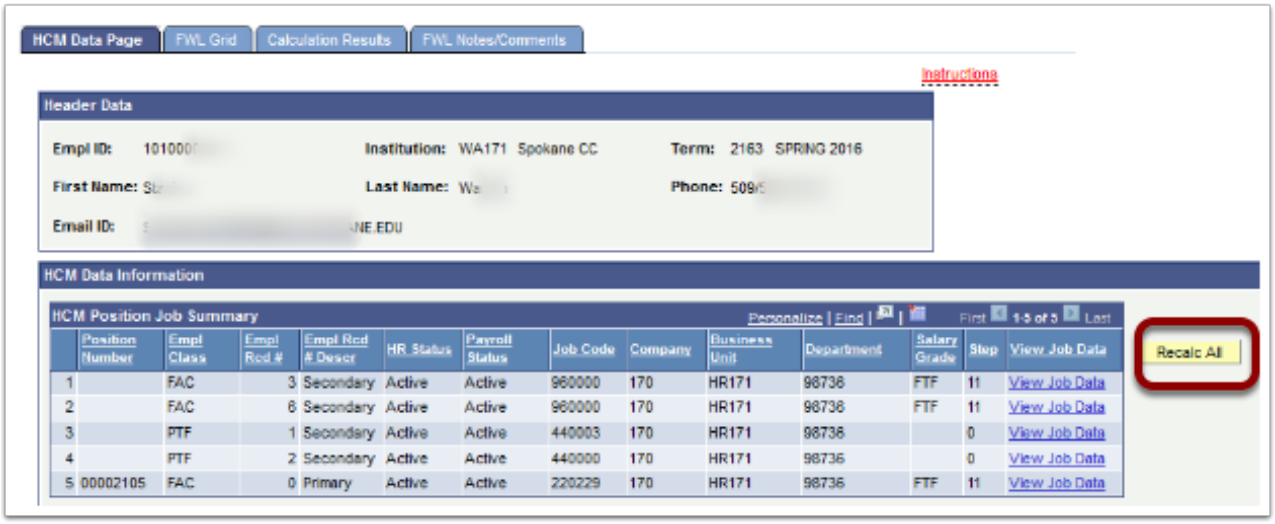


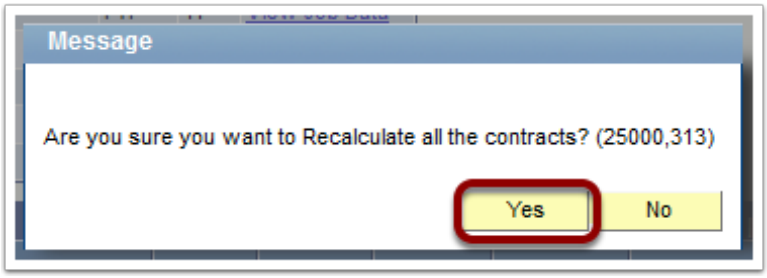
3. Click on the **FWL Grid** tab.
4. On the **FWL Grid** page, click the **Third** tab.
5. Add the number of enrolled students on the census date of the class to the **Student Census Enrolled** field.
6. Click **Save**.



Tip: Did you know you can re-organize the fields you see on the **FWL Grid**? Just click the *Personalize* link and re-order the fields. Want all the most relevant fields on the First Tab, just use the fields you want in the **Column Order** and move them up to the top under the *Tab First Tab (frozen)* header. You can also hide fields that aren't important to you. This formatting will be tied to only your login and will follow you wherever you go when you login to ctcLink.

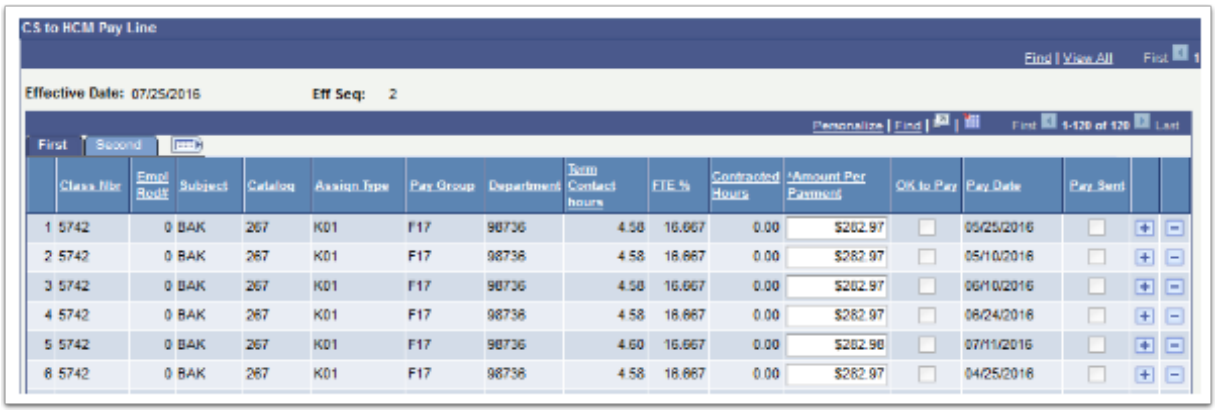
7. Click the **HCM Data** tab, click the **Recalc All** button.
8. At the '*Are you sure you want to Recalculate all the contracts?*' message, click the **Yes** button.





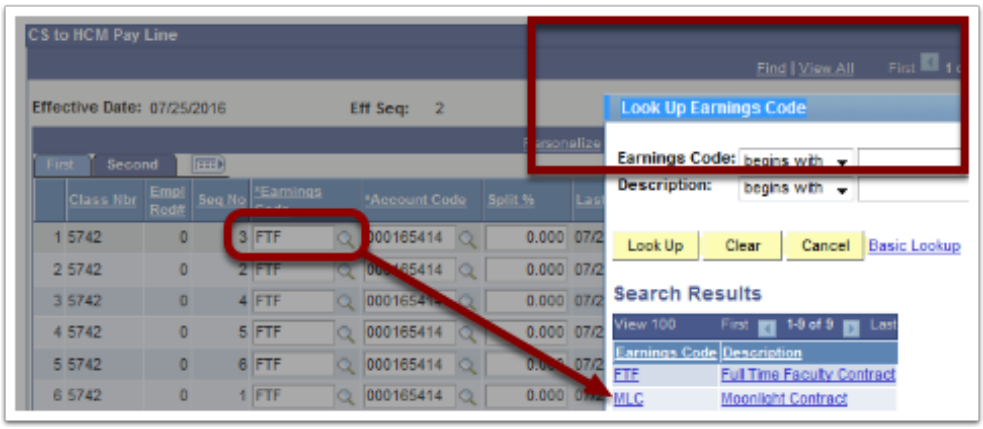
9. The system wait icon will appear in the upper, right hand corner of the screen.

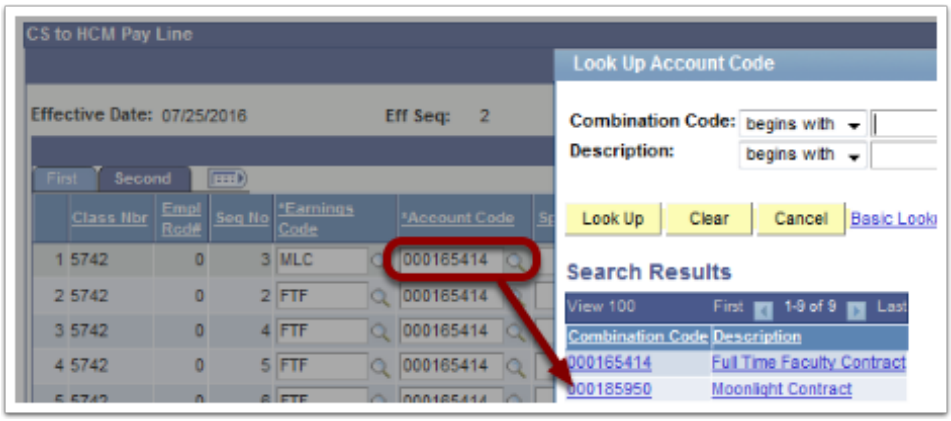
10. When the calculation is complete the screen will refresh and display a draft Pay Line and updated Calculation Results.



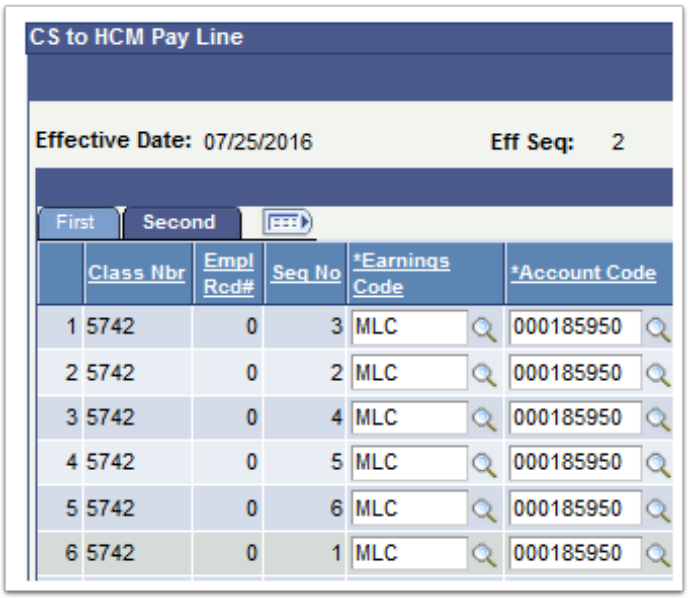
11. Click the **Calculation Results** tab. Verify the results (FTE%, Pay, Term Contact Hours) are accurate for the student count.

12. If Calculation Results are accurate, click on the **HCM Data** tab, and verify/update the Pay Line Earnings Code and Account Code (combo code) on the Second tab.





13. After all lines have been updated, click **Save**.



CS to HCM Pay Line

Effective Date: 07/25/2016 Eff Seq: 2

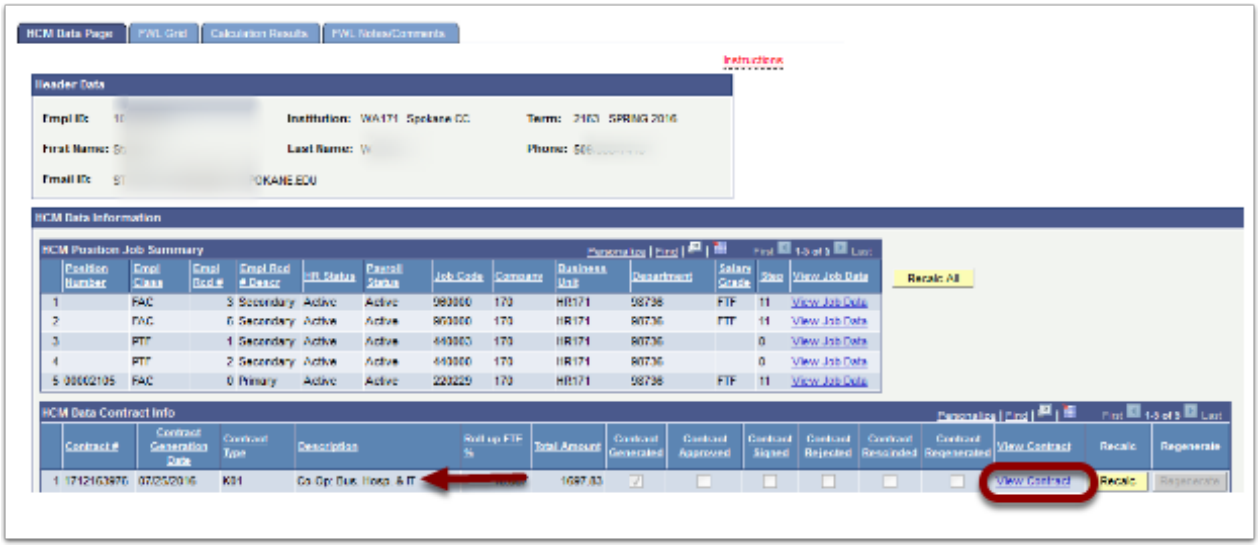
First | Second

	Class Nbr	Empl Rcd#	Seq No	*Earnings Code	*Account Code
1	5742	0	3	MLC	000185950
2	5742	0	2	MLC	000185950
3	5742	0	4	MLC	000185950
4	5742	0	5	MLC	000185950
5	5742	0	6	MLC	000185950
6	5742	0	1	MLC	000185950

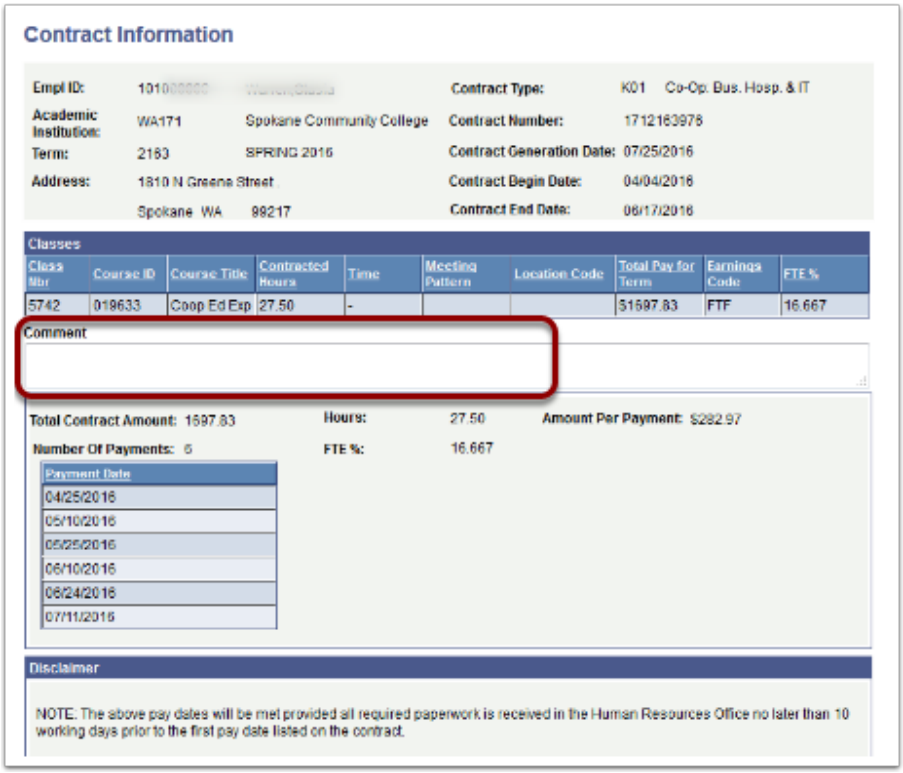
Generation and Review Online Contract

> **Note:** Not sure how to run the FWL Contract Generation Process to generate the online contract/appointment letter? Refer to the Quick Reference Guide - FWL Contract Generation (Batch).

1. After the contract has been generated, navigate back to **Maintain Faculty Workload**, on the **HCM Data** tab, in the **HCM Data Contract Info** section, click the **View Contract** link for the Co-Op contract type (e.g. K01) to open the online contract and verify the details.

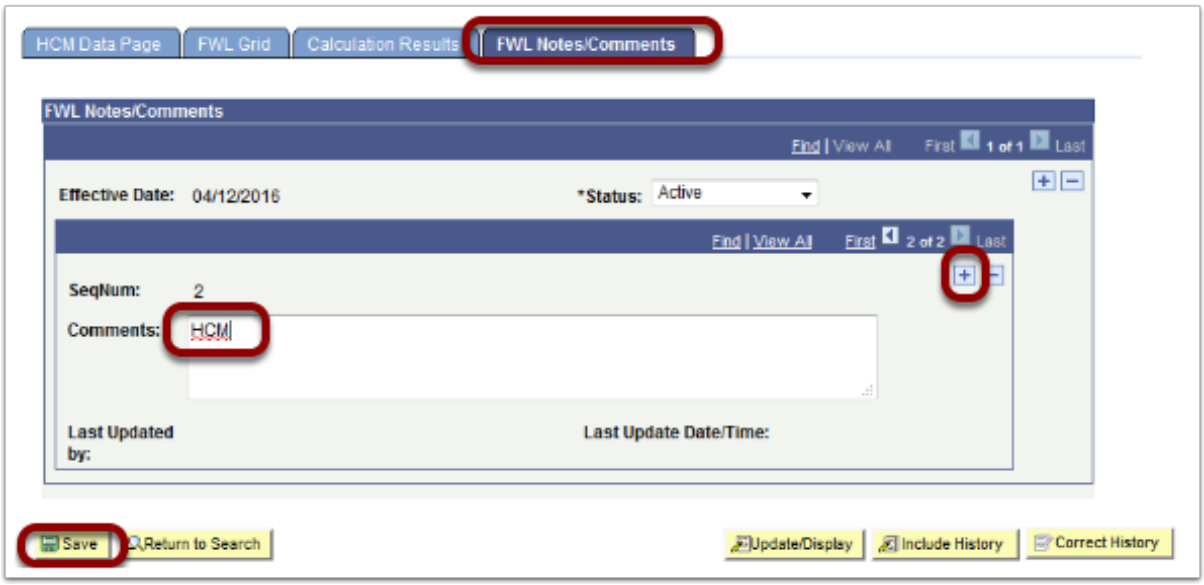


2. (optional) Add any comments you deem necessary to communicate information for this specific contract to the instructor.
   - If comments added, click **Save** then **Return**.
   - If no comments added, click **Return** to exit the contract view and return to the FWL page.



Add Note for HR Review

1. After the contract is verified and any comments have been added, click the **FWL Notes/ Comments** tab to update the notes with **HCM** in the first three positions. This will cause this contract to appear on the report run by HR noting which contracts area ready for HR review. If entries already exist on this page, click the Plus (+) symbol to add a new Sequence Number to enter a fresh comment.
2. Click **Save**.



3. Ensure Dean/Administrator approves the contract.
4. Ensure instructor has gone into Faculty Center and signed the contract.

FWL Configuration

Adding a Subject or Component to an Existing FWL Contract Configuration

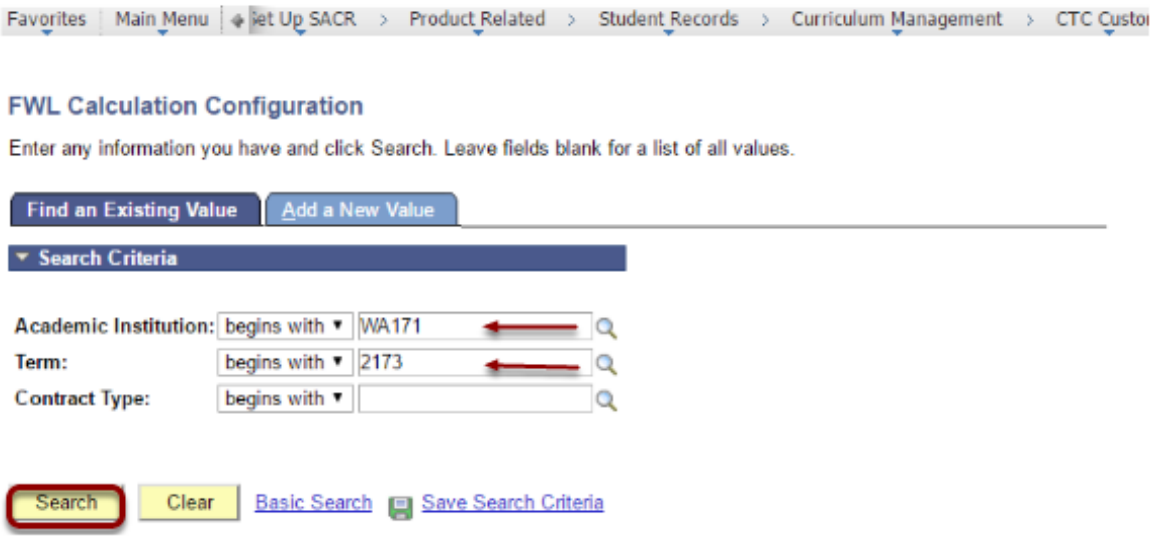
Purpose: Use this document as a reference for how to add a subject or component to an existing FWL contract configuration.

Audience: HR\Payroll Staff

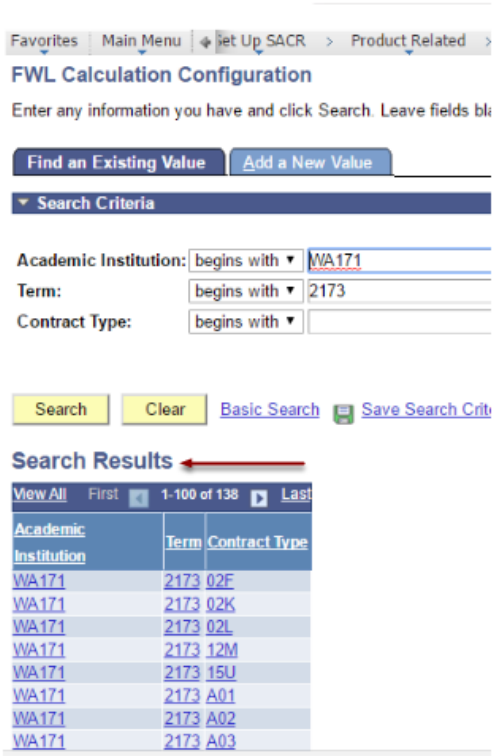
Navigation:

Main Menu → Set Up SACR → Product Related → Student Records → Curriculum Management → CTC Custom → Faculty Workload → FWL Calculation Configuration → FWL Configuration Calculation

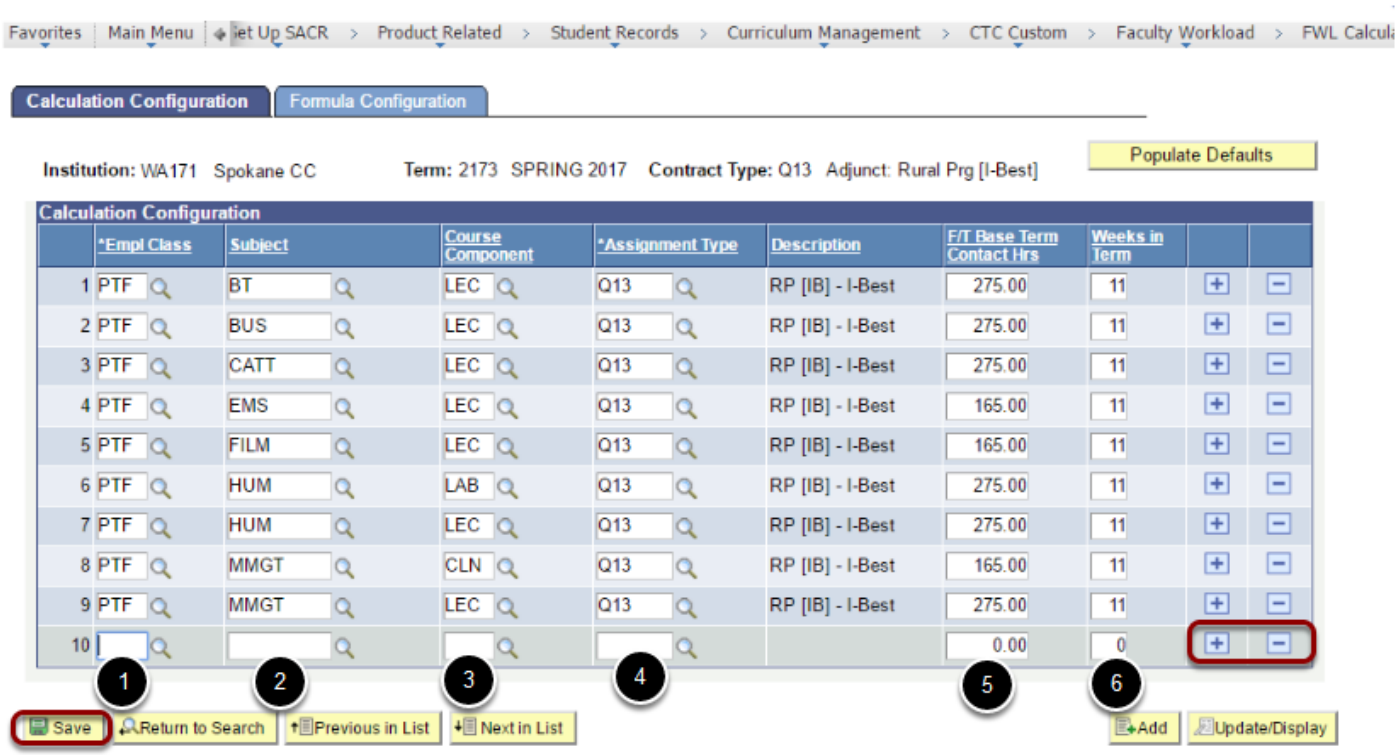
1. Navigate to the **FWL Calculation Config** page.
2. In the Search Criteria enter the following:
   - **Academic Institution:** Enter the institution code (e.g. WA171) or use the Look Up.
   - **Term:** Enter the **Term** to be '*copied from*' (e.g. 2173) or use the Look Up.
3. Click **Search**.



4. Click **Search** to view all contract in the returned **Search Results**.
5. Select the contract to be changed.



6. Use the **Plus** selection to add the new subject to the contract.



7. Click **Save**.

Copy Calculation Configuration to Next Term

Purpose: Use this document as a reference for how to roll forward the FWL Contract Type configurations from the current term to the next term.

Audience: HR\Payroll Staff

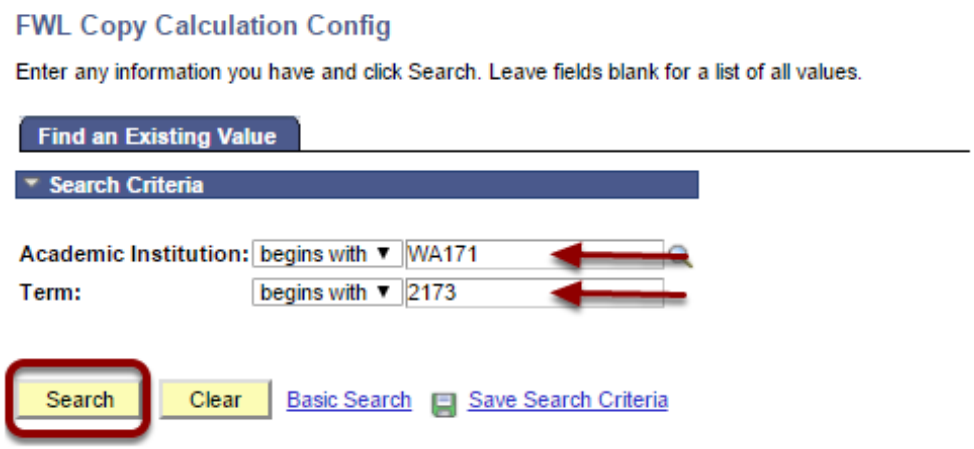
Navigation:

Main Menu → Set Up SACR → Product Related → Student Records → Curriculum Management → CTC Custom → Faculty Workload → FWL Calculation Configuration → Copy Configuration Calculation

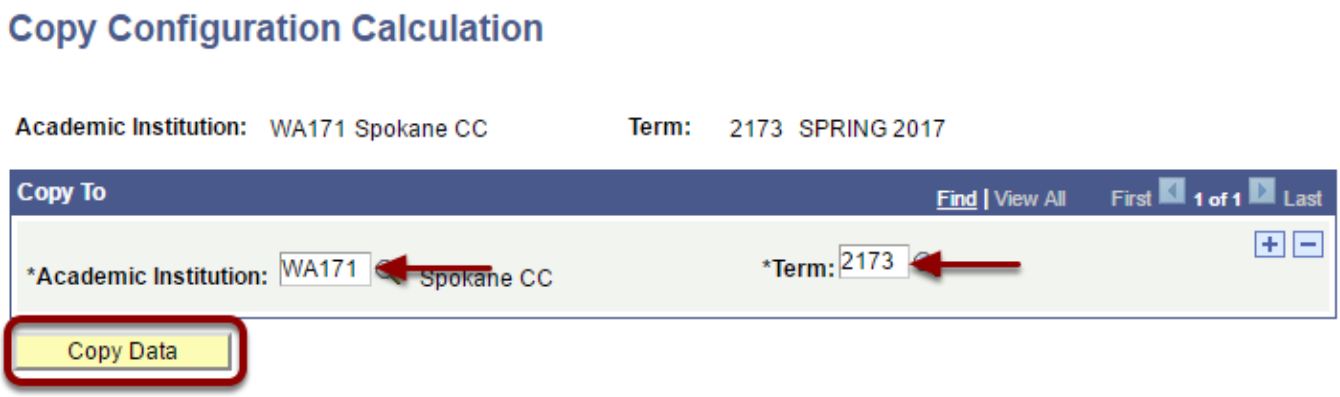
Main Menu → Set Up SACR → Product Related → Student Records → Curriculum Management → CTC Custom → Faculty Workload → FWL Calculation Configuration → FWL Configuration Calculation

Each new term will require colleges to 'roll forward' the FWL calculation configurations to the next term. Since there can be significant changes to the pay methodology or classes associated with a specific pay methodology, the FWL Calculation Configurations are term specific. The process is to 'copy' the prior term's configuration to the next term and make any necessary changes to the new term's formula or selection criteria before beginning calculation of pay for the next term.

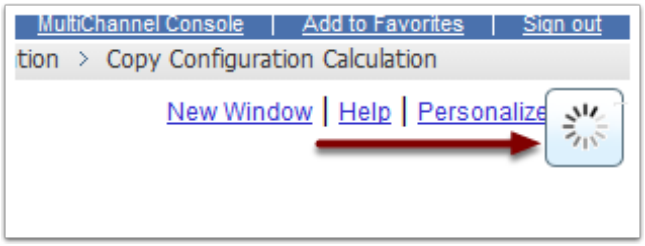
1. Navigate to the **FWL Copy Calculation Config** page.
2. In the Search Criteria enter the following:
   - **Academic Institution:** Enter the institution code (e.g. WA171) or use the Look Up.
   - **Term:** Enter the **Term** to be '*copied from*' (e.g. 2173) or use the Look Up.
3. Click **Search**.



4. In the **Copy To** section enter the following:
   - **Academic Institution:** Enter the institution code (e.g. WA171) or use the Look Up.
   - **Term:** Enter the **Term** to be '*copied to'* (e.g. 2173) or use the Look Up.
5. Click **Copy Data**.

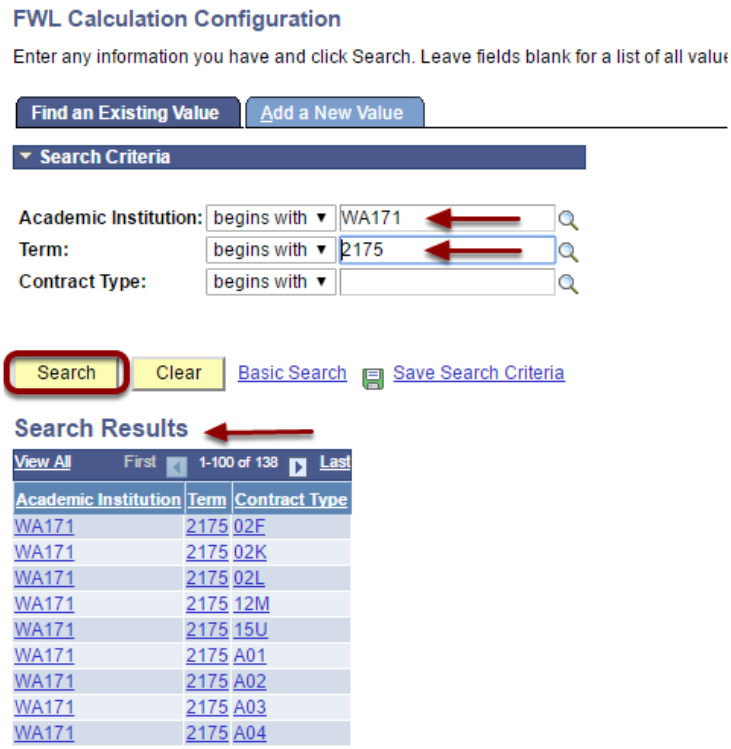


6. The system wait icon will appear in the upper, right hand corner of the screen. When the copy process is complete, the icon will disappear.



7. When the copy process is complete, navigate to the **FWL Calculation Configuration** page to confirm the copy process completion.
8. The system will carry forward the '*Copy From*' values of **Institution** (e.g. WA171) and **Term** (e.g. 2173), update the Term to the '**Copy To**' value (e.g. 2175).

9. Click **Search** to view all contract types copied forward in the returned **Search Results**.



10. If any changes are needed to the either the selection criteria or formula for the next term's contracts, now if the best time to make them before the contracts begin to be used.

Contract Types Configuration

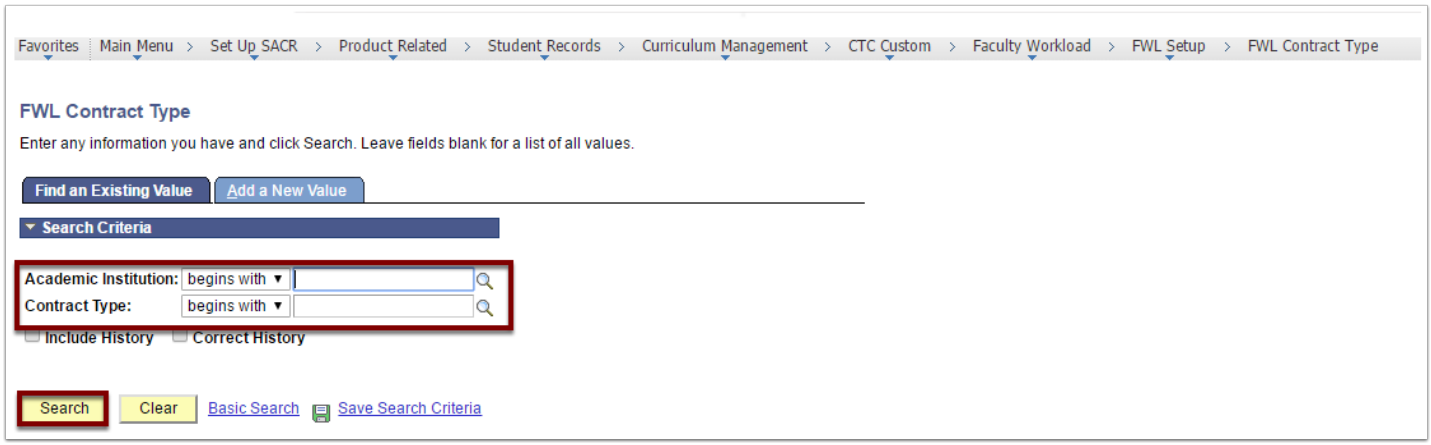
Purpose: Use this document as a reference for understanding how to establish the new and cloned pages needed for general configuration before you can begin processing anything related to Faculty Workload User Experience.

Audience: Class Scheduling Staff, HR\Payroll Staff

Navigation: Main Menu > Set Up SACR > Product Related > Student Records > Curriculum Management > CTC Custom > Faculty Workload > FWL Setup > FWL Contract Type

In order to associate a Calculation Configuration to a specific type of contract you must first establish a Contract Type. This Contract Type will then be entered into the Calculation Configuration page, and will appear in the HCM Data Contract Info section of the FWL Experience page.

1. Navigate to the **FWL Contract Type** page.
2. In the Search Criteria enter the following:
   - **Academic Institution:** Enter the institution code (e.g. WA171) or use the Look Up.
   - **Contract Type:** Enter the Contract Type (e.g. LEC) or use the Look Up.
3. Click **Search**.

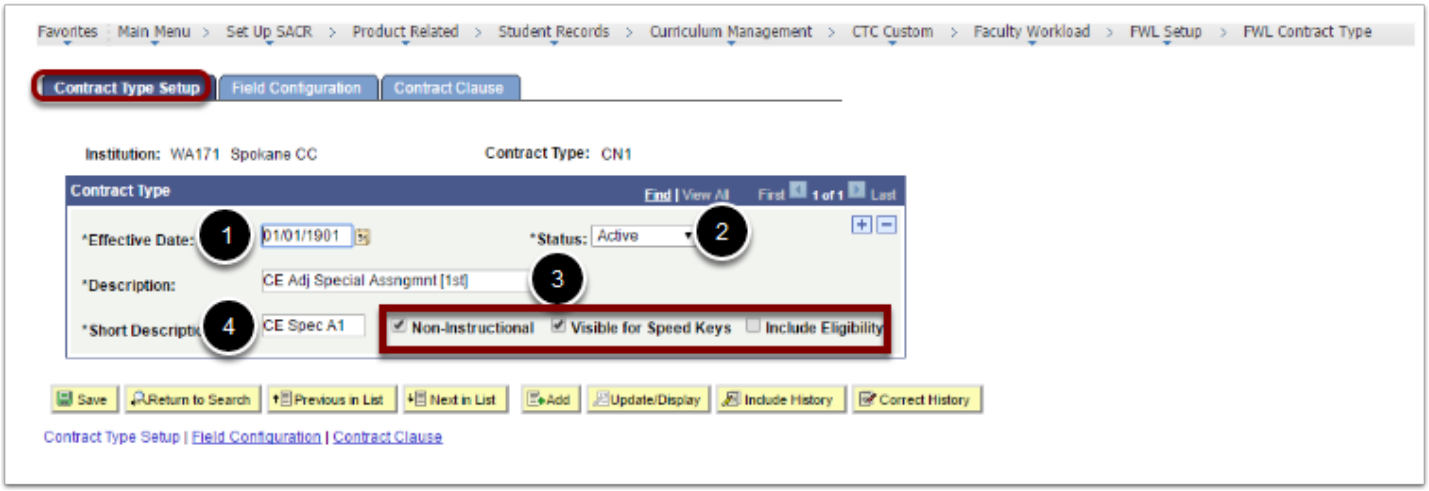


Colleges will have configured for them the naming convention for each contract type. These Contract Type codes will then be referenced in the FWL Calculation

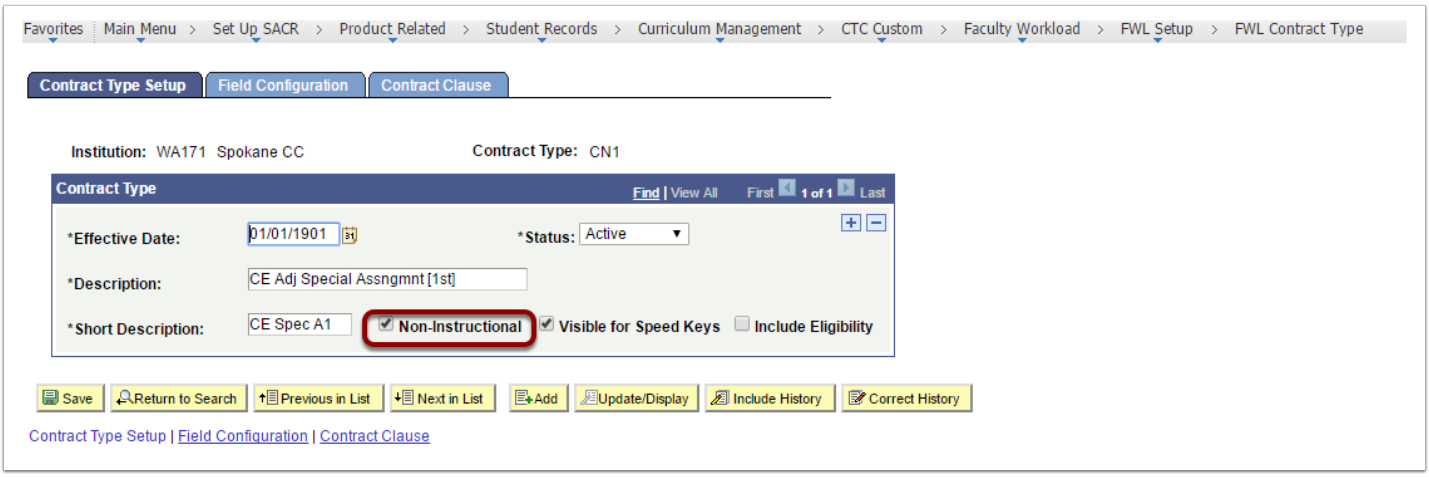
Configuration and drive the population of the Contract Type field in the HCM Contract Info grid.

Contract Type Tab: This page would define The Calculation Configuration, Formula, Speed Keys and Calc Result Page Layout.

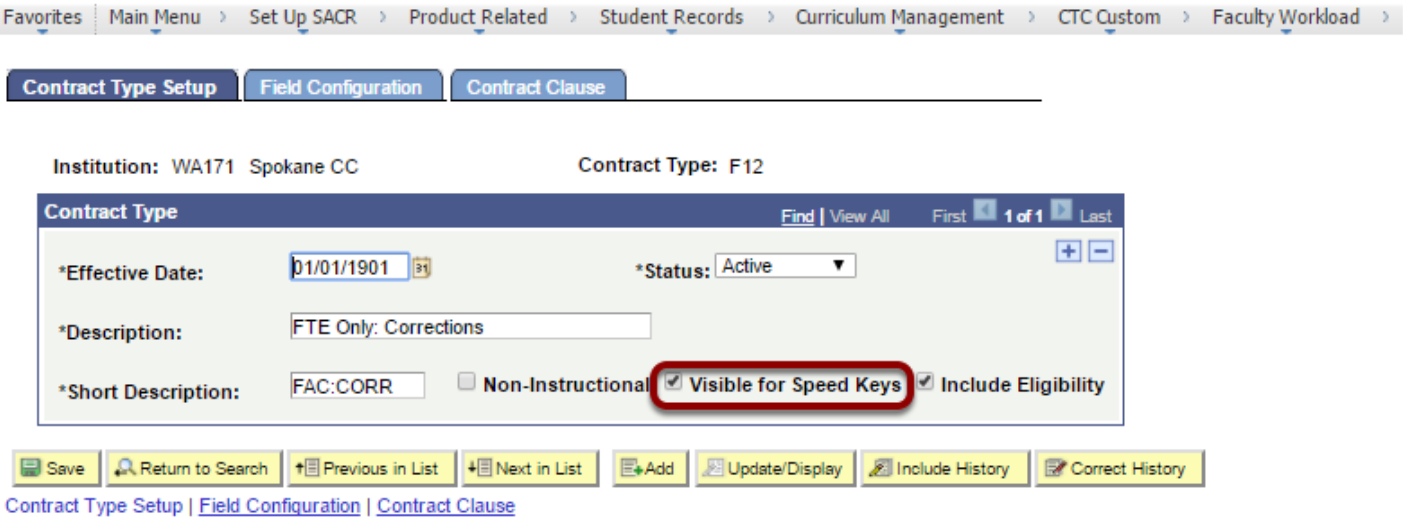
4. Enter **Effective Date**
5. Enter **Status**
6. Enter **Description**
7. Enter **Short Description**
8. Check **Non-Instructional**
9. Check **Visible for Speed Keys**
10. Check **Include Eligibility**



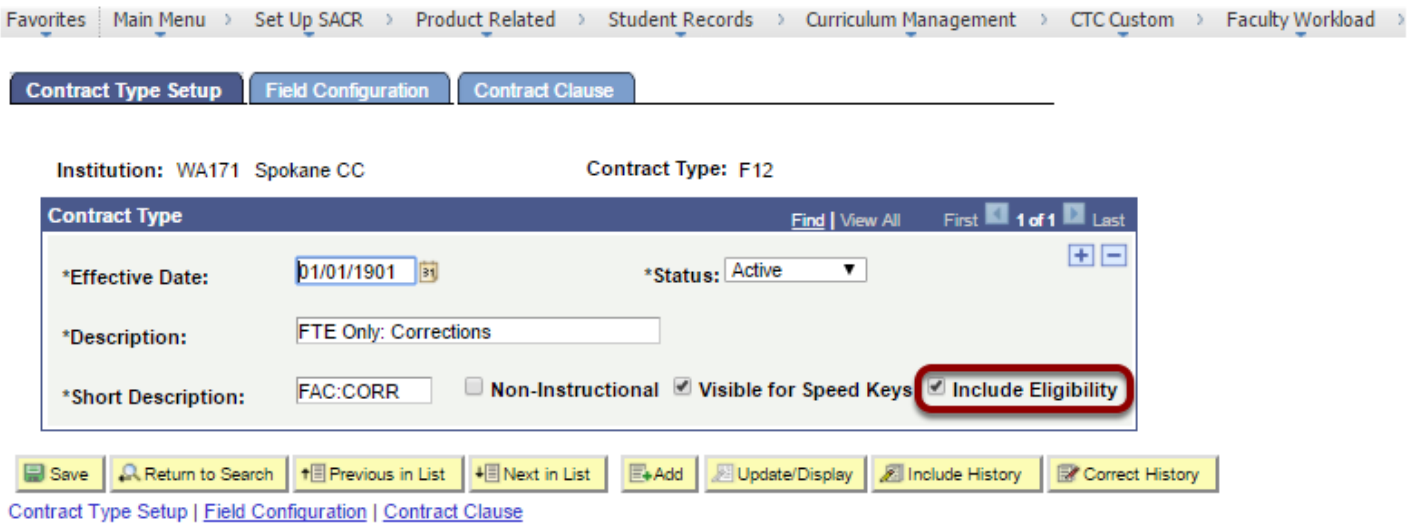
Non Instructional: (Special Assignment) will be selected for a non-teaching load to any instructor, example :(Advising, Meeting, Department Chair, Stipend, Special Project, Librarian, Counselors etc....)



Visible for Speed Key: If selected, then it's going to be a required field for respective contract.



Include Eligibility: If selected if the contract will be included toward benefits eligibility roll up FTE calculation. By in selecting the box the contract will not be included in the roll up FTE for the individual.



Field Configuration Tab: This page will dynamically create a layout for Calculation configuration, Formula Configuration, Speed Keys and Calc Result Page per contract.

Certain FWL contract types can be excluded from generating FTE on the benefit eligibility page by modifying the configuration in FWL to 'exclude' a specific contract type from having the FTE added to the total FTE value on this page. Calculated contract types would be impacted (trigger recalculation) if checking the box after contracts have been calculated.

Favorites | Main Menu > Set Up SACR > Product Related > Student Records > Curriculum Management > CTC Custom > Faculty Workload > FWL Setup > FWL Contract Type

Contract Type Setup | Field Configuration | Contract Clause

Institution: WA171 Spokane CC Contract Type: CN1

Field Configuration for Calculation — Find | View All First 1 of 1 Last

Effective Date: 01/01/1901 Status: Active

Description: CE Adj Special Assngmnt [1st]

	Field Name	Use in Calculation Configuration	Use in Formula	Use in Speed keys	Use in Calc Result Page	Interim Decimal Length
1	Assignment Type	☑	☐	☐	☑	
2	Class Nbr	☐	☐	☐	☑	
3	Actual Contract Rate	☐	☑	☐	☑	
4	Category	☐	☐	☐	☐	
5	Subject Comp Multiplier	☐	☐	☐	☐	
6	Co-op Max Std Enrolled	☐	☐	☐	☐	
7	Enrolled Student Threshold	☐	☐	☐	☐	
8	Excess Calc Rate	☐	☐	☐	☐	
9	Fees Override	☐	☐	☐	☑	
10	Flat Fee	☐	☑	☐	☑	
11	FTE %	☐	☑	☐	☑	
12	F/T Base Term Contact Hrs	☑	☑	☐	☑	
13	Contracted Hours	☐	☑	☐	☑	
14	Employee Classification	☑	☐	☑	☑	
15	Final Exam Fee	☐	☐	☐	☐	
16	MoonLight Term %	☐	☐	☐	☐	
17	Weekly Contact Hours	☐	☐	☐	☐	

Contract Clause Tab: This page will dynamically create a layout in the Contract Template per contract.

Favorites | Main Menu > Set Up SACR > Product Related > Student Records > Curriculum Management > CTC Custom > Faculty Workload > FWL Setup > FWL Contract Type

Contract Type Setup | Field Configuration | Contract Clause

Institution: WA171 Spokane CC Contract Type: CN1

Contract Type — Find | View All First 1 of 1 Last

Effective Date: 01/01/1901 Status: Active

Description: CE Adj Special Assngmnt [1st]

Contract Clause — Find | View All First 1 of 1 Last

*Contract Clause: ALL

*Description: CCS Contract Language

Short Description: CCS Contra

Long Description: CCS Contract Language

*Comment:

NOTE: The above pay dates will be met provided all required paperwork is received in the Human Resources Office no later than 10 working days prior to the first pay date listed on the contract.

In addition to the conditions stipulated on the Adjunct Academic Employee Contract, and the Master Contract between the Community Colleges of Spokane Board of Trustees and the CCS Association for Higher Education, below are further conditions of this appointment.
This contract shall continue to be in force and in effect only as long as sufficient funds are available as determined by CCS and to the extent

Save | Return to Search | Previous in List | Next in List | Add | Update/Display | Include History | Correct History

Contract Type Setup | Field Configuration | Contract Clause

Click **Save**.

Web Ex Recording 9/19/16

Video - Faculty Work Load Business Process Training Web Ex Recording 9/19/16

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