

**NAU** NORTHERN ARIZONA UNIVERSITY

**ePAR Analytics**

**Funding Report Guide**

# Introduction

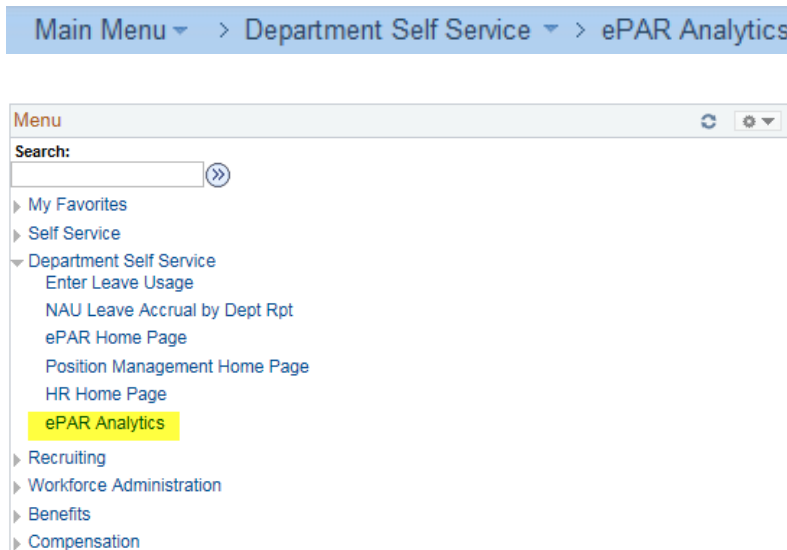
## Overview

The ePAR Analytics Funding Report is a report in PeopleSoft HCM that provides an overview of information obtained from electronic personnel action requests (ePARs) and Funding Forms. This Funding Report was created as a tool to allow analysis of personnel actions within a HR department and those outside of your HR department where funding is linked to your PeopleSoft Financial Department IDs. This report is also a resource for departments to determine where a particular form is in the approval process.

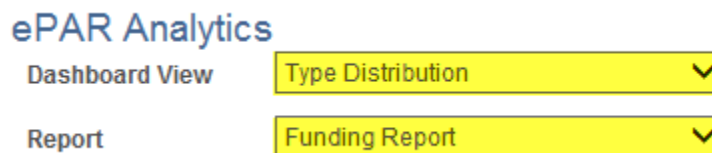
You will need to obtain the proper security role to access ePAR Analytics. The role to add to your ePASS request is “NAU\_HR Analytics Dept”.

## Navigation

To navigate to the Funding Report in PeopleSoft HR (LOUIE) go to Department Self Service > ePAR Analytics.



Once you are in ePAR Analytics, select “Type Distribution” under Dashboard View and “Funding Report” under Report as shown below.



# Ways to Utilize the Report

## Searching for a Specific Form Type for a Given HR Department

To return results for a specific type of form, make sure to include the form type in the search criteria. Keep in mind, the dates in the search criteria are when the ePAR or Funding Form was first submitted (origination date).

**Results Search Query**

From Date:  To Date:  (origination dates)

Form Type:

Form Status:

HR Dept:

Position Number:

PF Dept:

Fund:

Project:

Empl ID:

In this first example, we will include a date range for the month of February for hires in a HR Department. In this instance, you will select "HIRE" under Form Type.

As shown below, the results will include a table, graph and a list of relevant forms located at the bottom of the page.

ePAR Analytics

Dashboard View:

Report:

Form	Count	Percentage
Hire	4	100.000

**Results Search Query**

From Date:  To Date:

Form Type:

Form Status:

HR Dept:

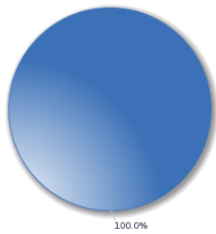
Position Number:

PF Dept:

Fund:

Project:

Empl ID:







100.0%

Results	Form ID	Form Type	Status	Next Role Apprv	Action	Reason	HR Dept	Effective Dt	Origination Dt	Name	PF Dept	Fund	Program	Project	PCT	Position Number	JOB_FUNCTION	Employee ID	View
1	201892	HIRE	Executed		REH	NCH	10227	2015-02-02	2015-02-03	Elle Stephens	2779000	3100	B002	1001816	100	00029022	STU	00000000	<a href="#">View</a>
2	202670	HIRE	Executed		REH	NCH	10227	2015-02-02	2015-02-04	Debrah Varnette	2779000	3100	B002	1002435	100	00027221	CLS	00200000	<a href="#">View</a>
3	202672	HIRE	Executed		REH	NCH	10227	2015-02-02	2015-02-04	Kyle Williams	2779000	3100	B002	1002435	100	00027221	CLS	00200000	<a href="#">View</a>
4	212444	HIRE	Executed		REH	NCH	10227	2015-02-16	2015-02-27	Amanda Ross	2779000	3100	B002	1002600	100	00027147	CLS	00200000	<a href="#">View</a>

From this information, you can determine there were three Classified Staff and one Student hired in this department in February with origination and effective dates provided. Additional identifying information is also found including, funding chartfields, position number and employee ID.

In addition to the form information listed, you have the ability to open up the ePAR or Funding Form directly from the report for those HR departments you have security for. If you don't have security for that HR department you will not be able to view the ePAR or Funding Form.

HR Dept	Effective Dt	Origination Dt	Name	PF Dept	Fund	Program	Project	Budget Use Only	PCT	Position Number	JOB_FUNCTION	Employee ID	Admin Tool	View
10227	2015-02-02	2015-02-03	Ellie Stephens	2779000	3100	B002	1001816		100	00025022	STU	3015343		
10227	2015-02-02	2015-02-04	Zachary Ventrola	2779000	3100	B002	1002435		100	00027221	CLS	3329649		
10227	2015-02-02	2015-02-04	Kyle McGovern	2779000	3100	B002	1002435		100	00027221	CLS	3329649		
10227	2015-02-16	2015-02-27	Amanda Rowe	2779000	3100	B002	1002600		100	00027147	CLS	3329649		

### Searching Forms Linked to Your Department Funding

To return results associated with a department's funding source for the beginning of the Fiscal Year to now, please follow this example. The business manager for Merriam Powell (which is associated with HR Department 10227 and PF Department 277) is searching for all forms that are tied to PF Department 2770090. After entering the date range, you can either enter the complete chartfield (PF Department, Funding and Project, if applicable) or you can use a wildcard (277%) to bring up all funding sources with a certain 3-digit prefix.

**Results Search Query**

From Date:  To Date:

Form Type:

Form Status:

HR Dept:

Position Number:

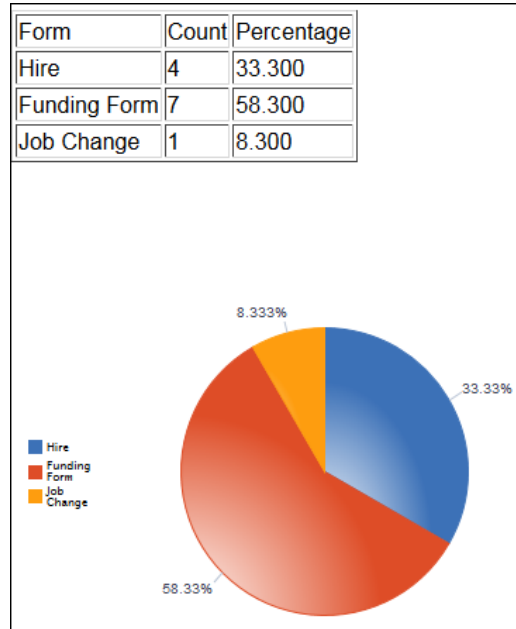
PF Dept:

Fund:

Project:

Empl ID:

As you can see below, the results show how many of each type of form has been linked to the department's funding this Fiscal Year.



In viewing the form list, you will find that a hire form was executed outside the HR department 10227 with the department funding that was selected. You can also see in this detail, that the hire is for a graduate student and it lists the name and employee ID of the individual. There is also a Job Change with the department funding for a decrease in hours (see Action/Reason).

Results														Personalize	Find	First	1-12 of 12	Last
	Form ID	Form Type	Status	Action	Reason	HR Dept	Effective Dt	Origination Dt	Name	PF Dept	Fund	Program	PCT	Position Number	JOB_FUNCTION	Employee ID	View	
1	105340	HIRE	Executed	REH	NCH	10227	2014-07-28	2014-07-02	Amy Whiggie	2770090	2500	D005	100	00026975	FAC	1182045	<a href="#">View</a>	
2	105340	HIRE	Executed	TER	TMP	10227	2014-08-11	2014-07-02	Amy Whiggie	2770090	2500	D005	100	00026975	FAC	1182045	<a href="#">View</a>	
3	113908	HIRE	Executed	REH	NCH	10211	2014-08-18	2014-08-06	Katerina Sotirakou	2770090	2500	D005	100	00023586	GRA	2563306	<a href="#">View</a>	
4	113908	HIRE	Executed	TER	TMP	10211	2015-08-15	2014-08-06	Katerina Sotirakou	2770090	2500	D005	100	00023586	GRA	2563306	<a href="#">View</a>	
5	143257	FUNDING	Executed			11340	2014-10-13	2014-10-02	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
6	156195	FUNDING	Executed			11340	2014-11-10	2014-10-31	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
7	168514	FUNDING	Executed			11340	2014-12-08	2014-11-25	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
8	178408	FUNDING	Executed			11340	2015-01-05	2014-12-12	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
9	189077	FUNDING	Executed			11340	2015-02-02	2015-01-08	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
10	203208	JOBCHANGE	Executed	PAY	DHR	11340	2015-02-02	2015-02-05	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
11	209007	FUNDING	Executed			11340	2015-02-16	2015-02-19	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	
12	209007	FUNDING	Executed			11340	2015-03-02	2015-02-19	Nana Storm	2770090	2500	D005	10	00017081	SPF	2161995	<a href="#">View</a>	

This information provides what personnel action is being taken with the funding and allows the department to reconcile information from PS Financials or Enterprise Reporting with PeopleSoft HCM. If you need additional information, but don't have access to view the form, you have information to refer to when contacting the initiating department.

## Locating Forms in the Approval Process

The Funding Report is also a good source in determining where a form is in the approval process. Searching for multiple forms, using this report is more efficient than pulling up each form individually. Also, you may be tracking a form another HR department has initiated with your funding source and since you don't have access to pull up the form in the ePAR menu, this report provides the next approver information.

In the search box, the drop down has several options on how to search for an ePAR or Funding Form that has not been executed to the system. You can use On Hold, Part Apprv (Partially Approved) or Pending to search for a form. Alternatively, to view all forms in progress, you can leave the Form Status blank to return all forms, export the results, and filter out the Executed forms.

**Results Search Query**

From Date:  To Date:  Search Using Form Status

Form Type:

**Form Status**: Part Apprv

HR Dept:  [Common Status Types:](#)  
On Hold  
Pending  
Partially Approved  
Executed

Position Number:

PF Dept:

Fund:

Project:

Empl ID:

Results		Example of Approval Levels								
	Form ID	Form Type	Status	Next Role Apprv	Action	Reason	HR Dept	Effective Dt	Origination Dt	
1	217000	HIRE	Partially Approved	NAU_HR ePAR SP Approver	HIR	NCH	10227	2015-03-16	2015-03-10	
2	217874	FUNDING	Partially Approved	NAU_HR ePAR Grad Apprv			10227	2015-03-09	2015-03-12	
3	217879	HIRE	Partially Approved	NAU_HR ePAR Dept Head Apprv	HIR	NCH	10227	2015-03-09	2015-03-12	

See an example list below of various approval levels, not all of which apply to every situation:

- **Next Role Apprv**
  - ePAR Departmental Approver
  - ePAR PI Grant Approver

- ePAR Head Apprv
- ePAR Grad College Approver
- ePAR Mid Level Approval
- ePAR Dean Approval
- ePAR Affirm Action Approver
- ePAR SP Approver (Post Award)
- ePAR Budget Approver
- ePAR HR Approver


To determine who the employee is who has the above approver roles, navigate to the Workflow Report as shown below and search for a Form Type (required) and HR Department or Position Number.


**ePAR Analytics**


Dashboard View Workflow ▼

Report Workflow Report ▼

Results Search Query


Form Type   Workflow Form Type

HR Dept  

Position Number  

**Workflow Form Type**

- CHGEMPSTAT
- FUNDING
- HIRE
- JOBCHANGE
- RENEW
- REPT



To view ePARs and Funding Forms that have been executed, choose “Executed” as the Form Status. The “Next Role Apprv” will be blank and the “Status” column will read “Executed”.

	Form ID	Form Type	Status	Next Role Apprv	Action	Reason	HR Dept	Effective Dt	Origination Dt
1	213967	CHGEMPSTAT	Executed		TER	TMP	10227	2015-02-28	2015-03-04

## Contact

If you have any questions about the Funding Report after reviewing this guide, please contact the University Budget Office at [budget@nau.edu](mailto:budget@nau.edu).