

EPAR ANALYTICS

OVERVIEW

ePAR Analytics provides a single location to manage ePARs that have been initiated for your department. This reporting option offers multiple ways to evaluate the following ePAR Form types: Hire, Job Changes, Renewal, Change Employment Status, Reports To, and Funding.

REPORTS AVAILABLE

- **Aging Distribution** – Identifies any ePARs that are still active (pending approval) during a given time period.
 - **Report Details on Page 3**
- **Funding Report** – Provides the ability to identify ePARs that have been submitted over a certain date range; this includes ePARs in ALL states (pending, on hold, executed, etc.)
 - **Report Details on Page 7**
 - For a more extensive look into the Funding Report, please review the [Funding Report Guide](#) by the Budget Office.
- **Workflow Report** – Provides a look at the approval level for ePARs and who is listed at that level.
 - **Report Details on Page 9**

NAVIGATE TO EPAR ANALYTICS

HR SECURITY

Ensure you have the appropriate HR Security Role added by submitting an ePASS: NAU_HR Analytics Dept

If you do not have an ePAR Approval role, we recommend also getting the role of: NAU_HR ePAR Viewer

- **Submit an ePASS for yourself:** Log in to [PeopleSoft](#) > HR Homepage > Employee eFORMs > ePASS Homepage
- **Submit an ePASS for your Direct Reports To:** Log in to [PeopleSoft](#) > HR Homepage > Manager/Department Dashboard > Manage eFORMs > ePASS Evaluation Homepage

NAVIGATING TO EPAR ANALYTICS

Within [PeopleSoft](#), open the right-side panel, select **Navigator** > Department Self Service > ePAR Analytics

UNDERSTANDING EPARS

EPAR FORM TYPES

- **Hire** – Used to hire employees into new or concurrent positions, also used to transfer a full-time employee from their current position to their new full-time position.
- **Job Change** – Used to update an employee’s existing job, whether that be pay or title changes, special assignments, or other non-termination/leave items.
- **Renewal** – Used to renew employee’s contracts.
- **Change Employment Status** – Used to update the employment status of employees, whether they are terminating, going on leave, or undergoing other status changes.
- **Reports To** – Used to update the Reports To of a position number.
- **Funding Form** – Used to update funding information tied to position numbers.
 - *Funding Forms are managed by the [Budget Office](#).*

EPAR FORM STATUSES

- **Executed** – Displays finalized ePARs that have been written to the system
- **Authorized** – Displays ePARs that have passed final approval and are waiting to be written to the system
- **On Hold** – Displays ePARs that are currently On Hold
- **Pending** – Displays ePARs that are currently working through approval lists
- **Part Apprv** – Displays ePARs that are awaiting final approval
- **Denied** – Displays ePARs that have been denied
- **In Error** – Displays ePARs that have caused an error
- **Withdrawn** – Displays ePARs that have been withdrawn

EPAR FORM APPROVAL ROUTING

The approval routing may be the same or vary based on the Form Type:

- Hire, Job Change, Renewal, Change Employment Status Form – All share the same approval path.
- Funding Form – Unique approval path.
- Reports To – Unique approval path.

Aging Distribution

Aging Distribution will identify all ePARs that are active during a specific time period. This will only show ePARs that have not been fully executed/approved and are still pending approval(s).

On the ePAR Analytics page, select the following items:

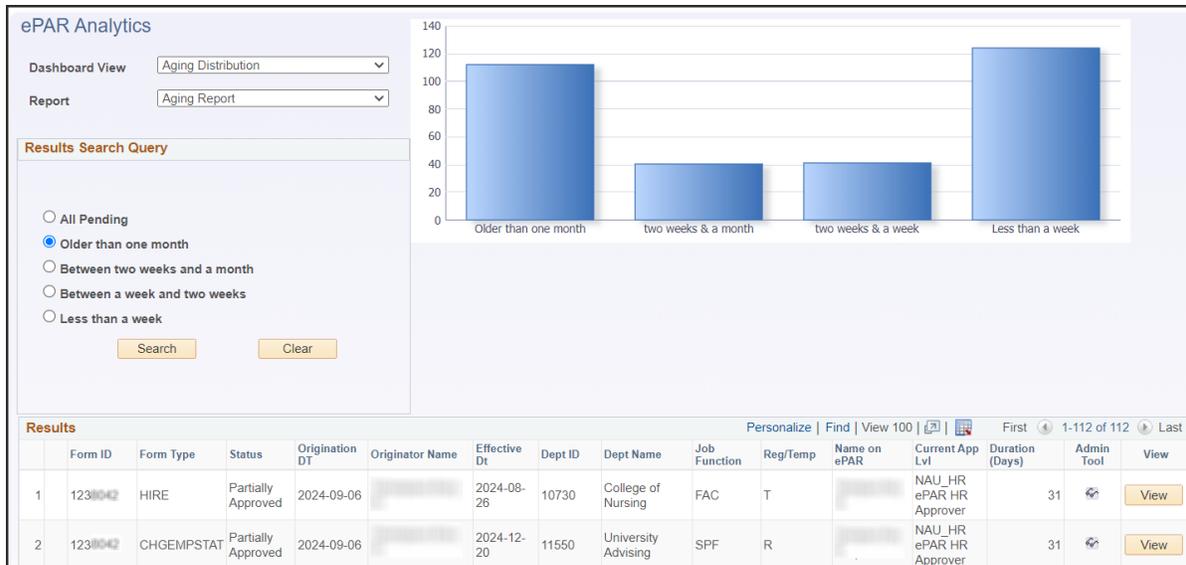
- **Dashboard View:** Aging Distribution
- **Report:** Aging Report

Then, select the timeframe you would like to view:

The screenshot shows the 'ePAR Analytics' interface. At the top, there are two dropdown menus: 'Dashboard View' set to 'Aging Distribution' and 'Report' set to 'Aging Report'. Below these is a section titled 'Results Search Query' with a light blue header. Inside this section, there are five radio button options: 'All Pending' (which is selected), 'Older than one month', 'Between two weeks and a month', 'Between a week and two weeks', and 'Less than a week'. At the bottom of the search query section, there are two buttons: 'Search' and 'Clear'.

- **All Pending**
- **Older than one month**
- **Between two weeks and a month**
- **Between a week and two weeks**
- **Less than a week**

Once the timeframe has been selected, you will see the appropriate ePARs that have not executed.



The **Results** section lists the specific ePARs that were processed for the submitted criteria. Use the **View** option to review the specific ePAR.

- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish;
 - Hire: Hiring an employee
 - Job Change: A change to an employee’s existing position
 - Change Emp Status: Any change in an employee's status (termination, leave, etc.)
 - Funding: Change to the funding on a position
- **Status** – This is the current status of the ePAR.
- **Origination Date** – The date the ePAR was initiated.
- **Originator Name** – The initiator of the ePAR.
- **Effective Date** – The effective date for the ePAR (start date, last day working, date of the job change, etc.)
- **Department ID** – 5-digit department number
- **Job Function** – The job classification of the employee identified in the ePAR.
- **Reg/Temp** – Lists the Regular(R) or Temporary(T) status of the employee identified in the ePAR.
- **Name on ePAR** – The name of the employee the ePAR was initiated for.
- **Current Approval Level** – The current approver level on the ePAR; select ‘View’ to see the specific individual.
- **Duration (Days)** – Lists how long the ePAR has been active.
- **View** – Select this to open the ePAR in a new window to view the details or next/upcoming approvers.

Funding Report

The Funding Report provides the ability to identify ePARs that have been submitted over a certain date range; this includes ePARs in ALL states (pending, on hold, executed, etc.) while adding financial details. For a more extensive look into the Funding Report, please review the [Funding Report Guide](#) by the Budget Office. *Note: Funding Forms are managed by the [Budget Office](#).*

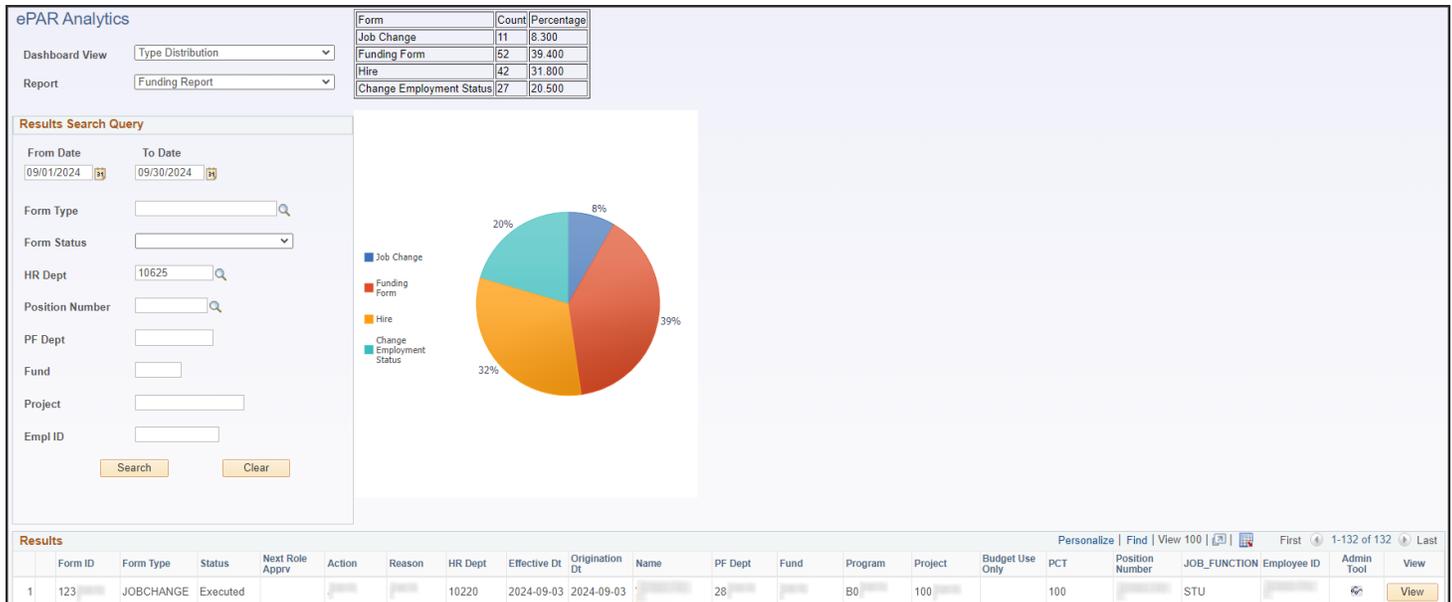
On the ePAR Analytics page, select the following items:

- **Dashboard View:** Type Distribution
- **Report:** Funding Report

The screenshot shows the 'ePAR Analytics' interface. At the top, there are two dropdown menus: 'Dashboard View' set to 'Type Distribution' and 'Report' set to 'Funding Report'. Below these is a 'Results Search Query' section with various search criteria: 'From Date' and 'To Date' (both with calendar icons), 'Form Type' (text input with search icon), 'Form Status' (dropdown), 'HR Dept' (text input with search icon), 'Position Number' (text input with search icon), 'PF Dept' (text input), 'Fund' (text input), 'Project' (text input), and 'Empl ID' (text input). At the bottom of the search section are 'Search' and 'Clear' buttons.

- **From and To Dates** – Timeframe you would like to review.
- **Form Type** – View a specific ePAR type or view all types.
- **Form Status** – View ePARs in any status or choose a specific status.
- **HR Department** – Enter your department ID.
- **Position Number** – View ePARs tied to a specific position number.
- **PF Department** – View ePARs tied to a specific PF department.
- **Fund** – View ePARs tied to a specific fund.
- **Project** – View ePARs tied to a specific project.
- **Employee ID** – View ePARs tied to a specific employee ID.

Once you have identified your criteria, select **Search**. The following data will be displayed:



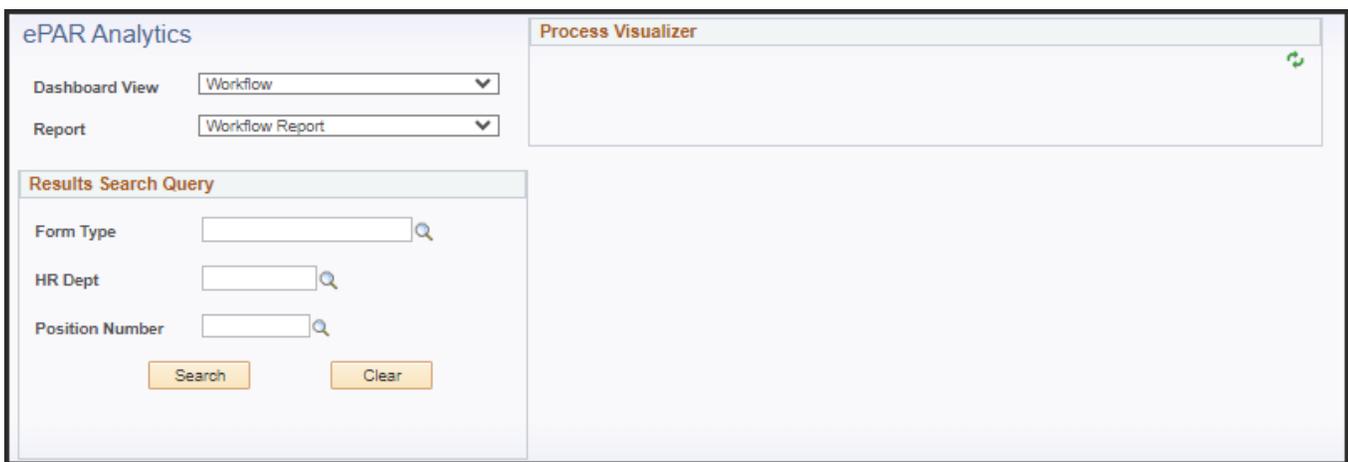
- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish; Hire, Job Change, Funding, etc.
- **Status** – This is the current status of the ePAR.
- **Next Role Apprv** – The role of the next approver.
- **Action & Reason** – The specific action and reason for this ePAR.
- **HR Department** – Department tied to this ePAR and/or Position Number.
- **Effective Date** – The effective date for the ePAR (start date, last day working, date of the job change, etc.)
- **Origination Date** – The date the ePAR was initiated.
- **Funding Information**
 - **PF Department**
 - **Fund**
 - **Program**
 - **Project**
 - **PCT**
- **Position Number** – Position number tied to the ePAR.
- **Job Function** – The employee’s job function that is tied to the ePAR.
- **Employee ID** – Employee ID of the employee the ePAR was initiated for.
- **View** – Select this to open the ePAR in a new window to view the details or next/upcoming approvers.

Workflow Report

Identifies the specific approval path is for a position number or department. You will be able to view the approvers listed for each role in the approval process.

On the ePAR Analytics page, select the following items:

- **Dashboard View:** Workflow
- **Report:** Workflow Report



- **Form Type** – Select a specific ePAR type through the magnifying glass.
 - *You must select a Form Type.*
- **HR Department** – Enter your department ID.
 - *You must enter a Department ID.*
- **Position Number** – View ePAR paths tied to a specific position number.

Once you have identified your criteria, select **Search**. The following data will be displayed:

The screenshot displays the ePAR Analytics interface. At the top left, there are dropdown menus for 'Dashboard View' (set to 'Workflow') and 'Report' (set to 'Workflow Report'). The main area is titled 'Process Visualizer' and shows a sequence of 18 steps in a grid. Each step includes an icon of people and a role name. Steps 2, 3, and 7 have a red 'X' over the icon, indicating no users are assigned to those roles. The roles listed are: 1: NAU_HR ePAR Initiator, 2: NAU_HR ePAR Dept Approver, 3: NAU_HR ePAR PI Grant Apprv, 4: NAU_HR ePAR Dept Head Apprv, 5: NAU_HR ePAR Grad Apprv, 6: NAU_HR ePAR Mid Level Apprv, 7: NAU_HR ePAR Dean Apprv, 8: NAU_HR ePAR AA Approver, 9: NAU_HR ePAR SP Approver, 10: NAU_HR ePAR EC Apprv, 11: NAU_HR ePAR JFR Apprv, 12: NAU_HR ePAR VP Apprv, 13: NAU_HR ePAR Budget Approver, 14: NAU_HR ePAR Benefits Approver, 15: NAU_HR ePAR ER Approver, 16: NAU_HR ePAR IR Approver, 17: Integration Broker, and 18: System.

Below the visualizer is a 'Results Search Query' section with input fields for 'Form Type' (set to 'HIRE'), 'HR Dept' (set to '10625'), and 'Position Number'. There are 'Search' and 'Clear' buttons.

At the bottom is a 'Results' table with columns: RoleName, Userid, Emplid, Name, Filter, and View. The table contains two rows of data.

	RoleName	Userid	Emplid	Name	Filter	View
1	NAU_HR ePAR VP Apprv				By Department Security	View
2	NAU_HR ePAR VP Apprv		1		By Department Security	View

- **Process Visualizer** – View the roles in the order that they will approve an ePAR; the approval levels with a red 'X' indicates that no users have that role.
- **Role Name** – The Role Name represents the approval level, as shown in the Process Visualizer
- **User ID, Employee ID, Name** – Identifies the actual approver in the approval role.