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).

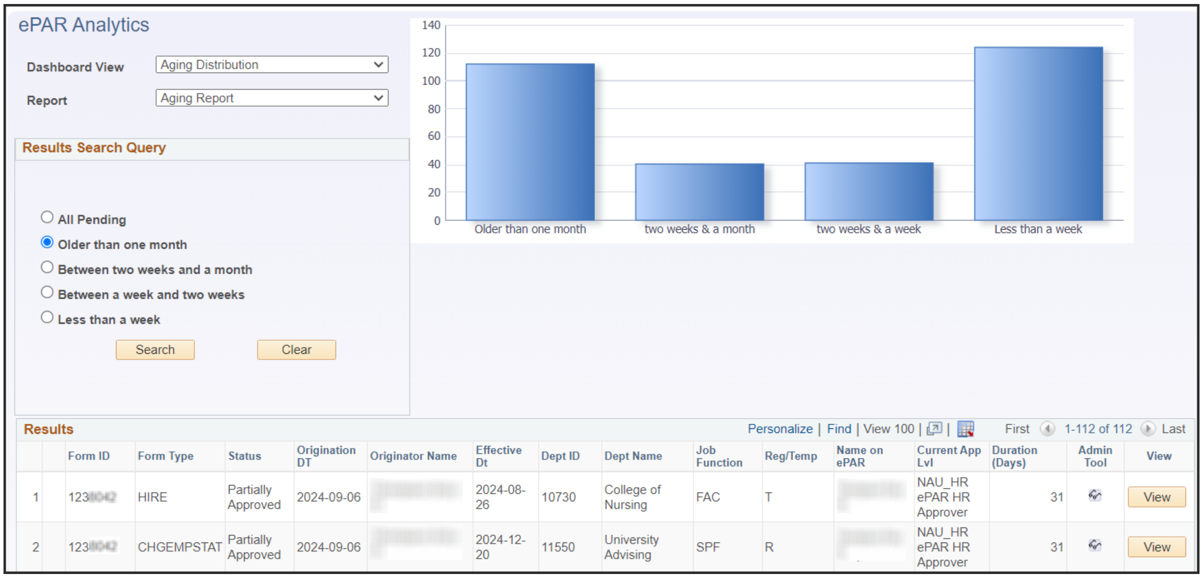
On the ePAR Analytics page, select the following items:

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

Then, select the timeframe you would like to view:

- **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.

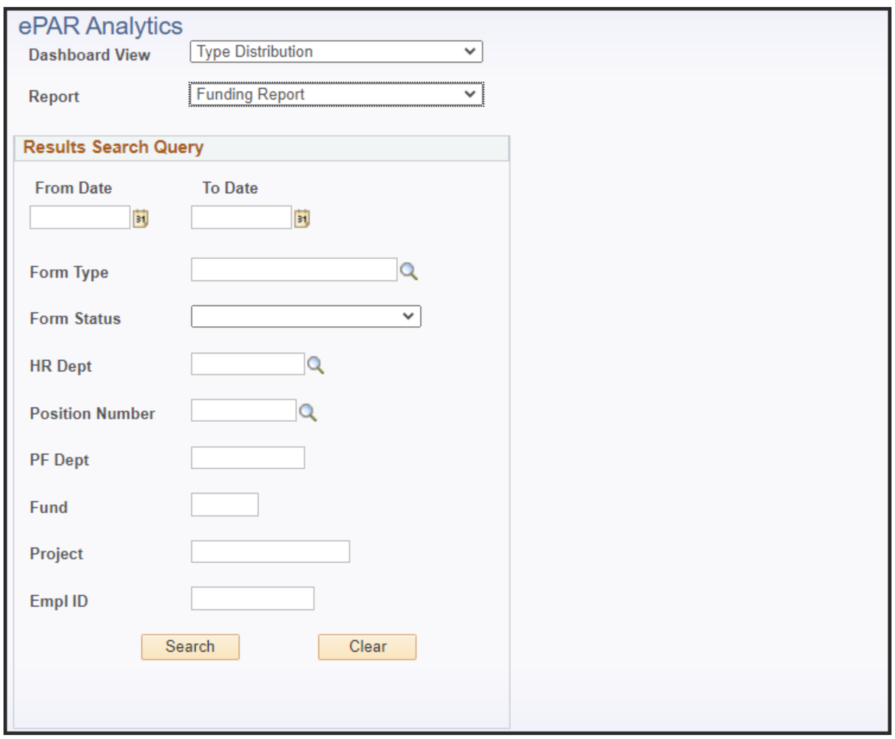
- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish;
  - Hire: Hiring an employee
  - Job Change: A change to an employee's existing position
  - Change Emp Status: Any change in an 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.*

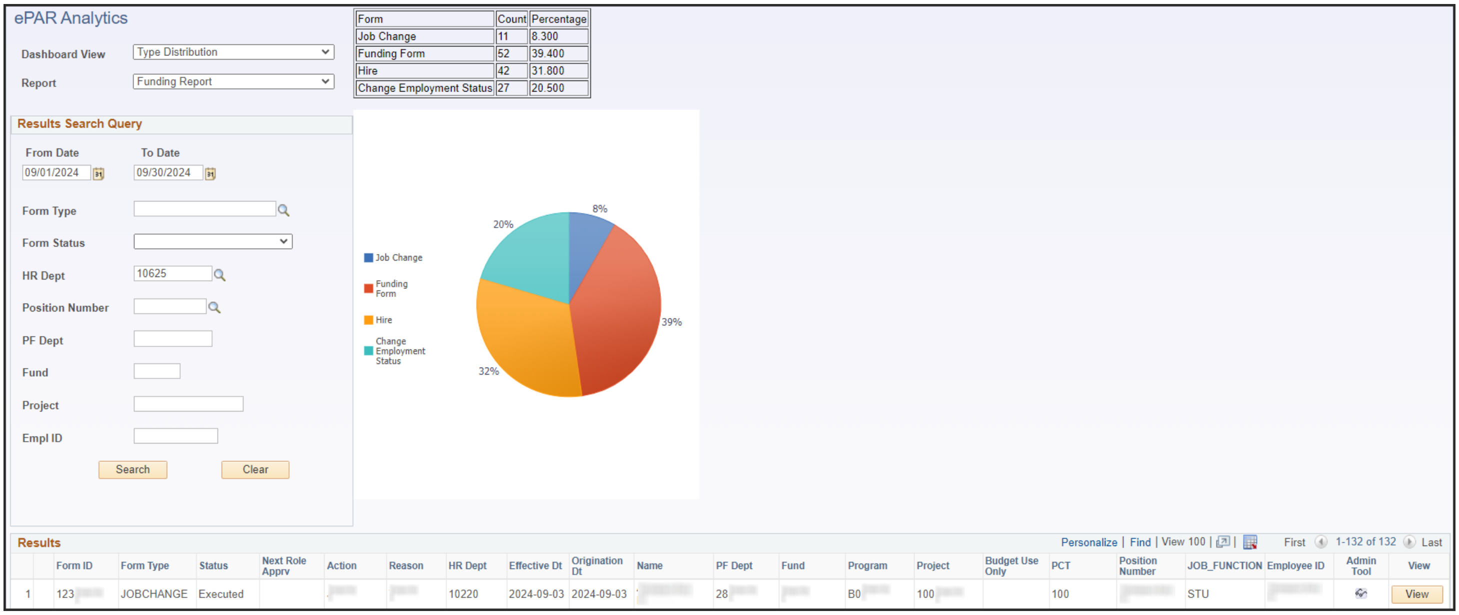
On the ePAR Analytics page, select the following items:

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



- **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:



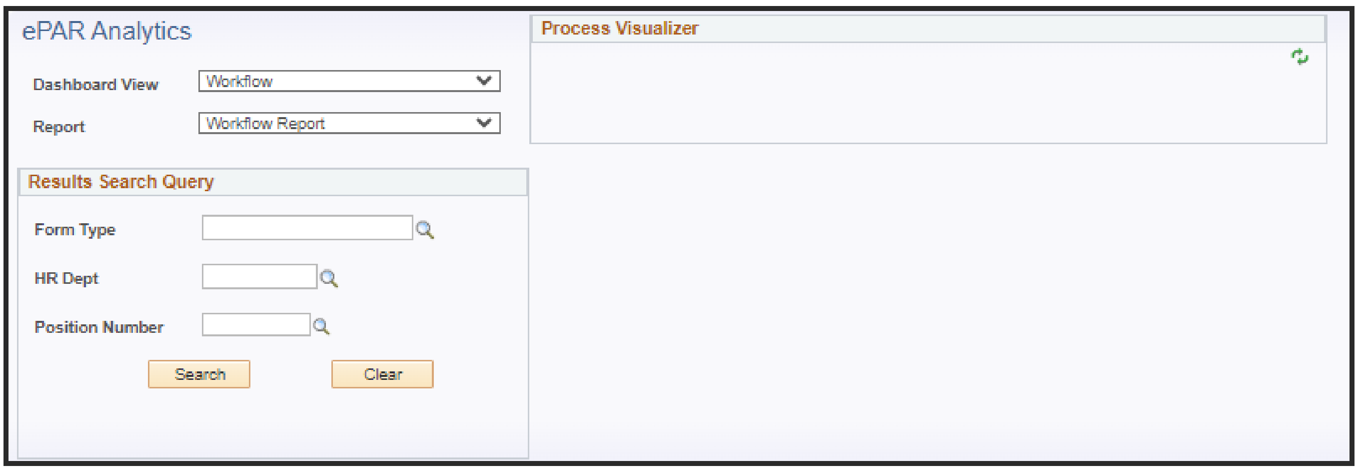
- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish; Hire, Job Change, Funding, etc.
- **Status** – This is the current status of the ePAR.
- **Next Role Apprv** – The role of the next 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.

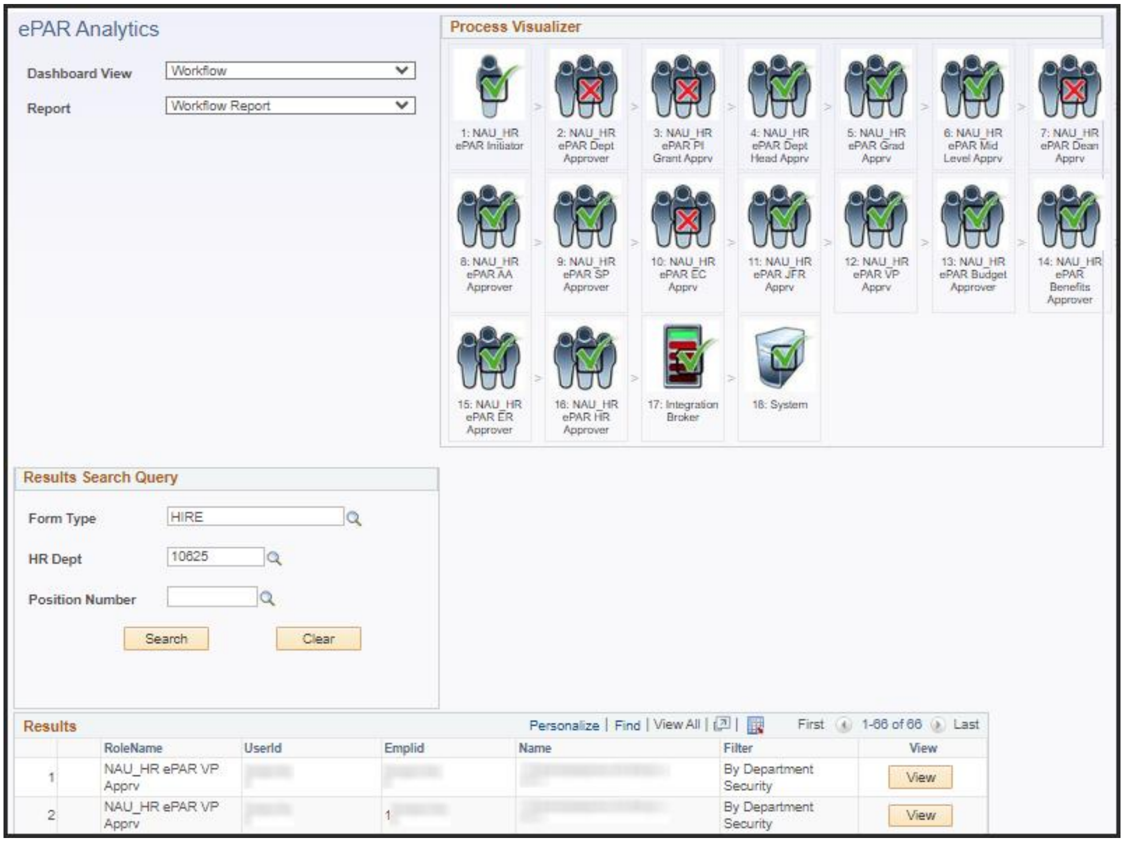
On the ePAR Analytics page, select the following items:

- **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:



- **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.