

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**
- **Form Type Distribution** – 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 5**
- **Funding Report** – Provides the details from the Form Type Distribution report while adding financial details.
 - **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
- **Part Apprv** – Displays ePARs that are awaiting final approval
- **Pending** – Displays ePARs that are currently working through approval lists
- **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:

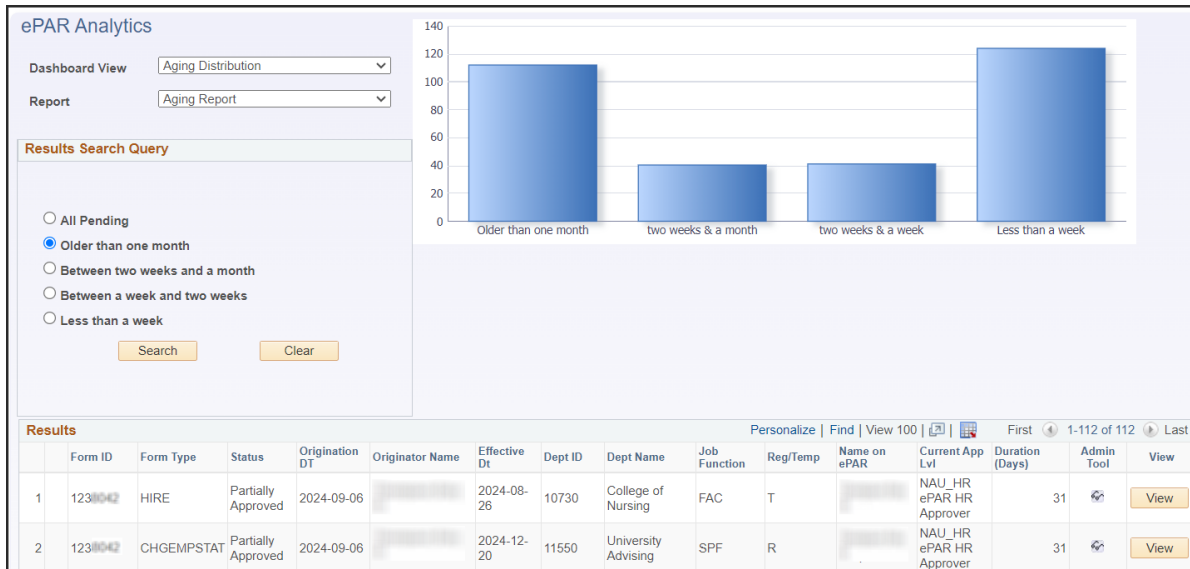
- **Dashboard View:** Aging Distribution
- **Report:** Aging Report

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.

Form Type Distribution

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.)

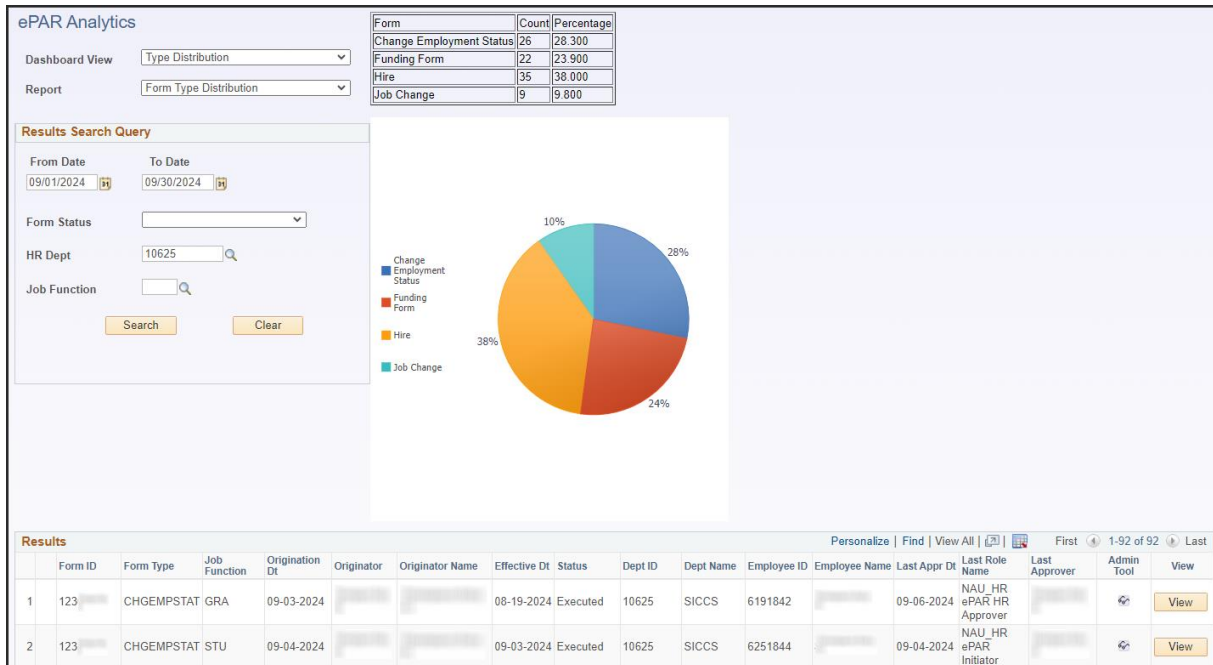
On the ePAR Analytics page, select the following items:

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

The screenshot shows the 'ePAR Analytics' interface. At the top, 'Dashboard View' is set to 'Type Distribution' and 'Report' is set to 'Form Type Distribution'. Below this is a 'Results Search Query' section with the following fields: 'From Date' and 'To Date' (both with calendar icons), 'Form Status' (a dropdown menu), 'HR Dept' (a text input with a magnifying glass icon), and 'Job Function' (a text input with a magnifying glass icon). At the bottom of the search section are 'Search' and 'Clear' buttons.

- **From and To Dates** – Timeframe you would like to review.
- **Form Status** – View ePARs in any status or choose a specific status.
- **HR Department** – Enter your department ID.
- **Job Function** – If you would like to view specific job functions (FAC, CLS, STU, etc.), enter the abbreviation or select the magnifying glass to make your selection. This can also be left blank to view all ePARs for all job functions.

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



Form, Count, Percentage Table – The total count of ePARs will be listed in this table, then represented by the pie chart below.

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
 - ChgEmpStat: Any change in an employee's status (termination, leave, etc.)
- **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.)
- **Status** – This is the current status of the ePAR.
- **Reg/Temp** – Lists the Regular(R) or Temporary(T) status of the employee identified in the ePAR.
- **Employee Name & ID**– The name and Employee ID of the employee the ePAR was initiated for.
- **Last Role Name & Last Approver** – The last approver role and user to approve the ePAR.
- **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 details from the Form Type Distribution report 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 displays the ePAR Analytics search interface. At the top, 'Dashboard View' is set to 'Type Distribution' and 'Report' is set to 'Funding Report'. The 'Results Search Query' section includes the following fields: 'From Date' and 'To Date' (with calendar icons), 'Form Type' (text input with search icon), 'Form Status' (dropdown menu), '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). 'Search' and 'Clear' buttons are located at the bottom of the search query section.

- **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:

ePAR Analytics

Dashboard View Type Distribution

Report Funding Report

Form	Count	Percentage
Job Change	11	8.300
Funding Form	62	39.400
Hire	42	31.800
Change Employment Status	27	20.500

Results Search Query

From Date: 09/01/2024 To Date: 09/30/2024

Form Type:

Form Status:

HR Dept: 10625

Position Number:

PF Dept:

Fund:

Project:

Empl ID:

Form Type	Percentage
Funding Form	39%
Hire	32%
Change Employment Status	20%
Job Change	8%

Results

Form ID	Form Type	Status	Next Role Apprv	Action	Reason	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
1	123	JOBCHANGE	Executed			10220	2024-09-03	2024-09-03		28		B0	100		100		STU			<input type="button" value="View"/>

- **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

The screenshot shows the ePAR Analytics interface. On the left, there are two dropdown menus: 'Dashboard View' set to 'Workflow' and 'Report' set to 'Workflow Report'. Below these is a 'Results Search Query' section with three search fields: 'Form Type', 'HR Dept', and 'Position Number', each with a magnifying glass icon. At the bottom of this section are 'Search' and 'Clear' buttons. On the right, there is a 'Process Visualizer' area with a refresh icon.

- **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. 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, a 'Results' table is shown with columns for RoleName, UserId, Emplid, Name, Filter, and View. The table contains two rows of data.

Results	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.