# 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).

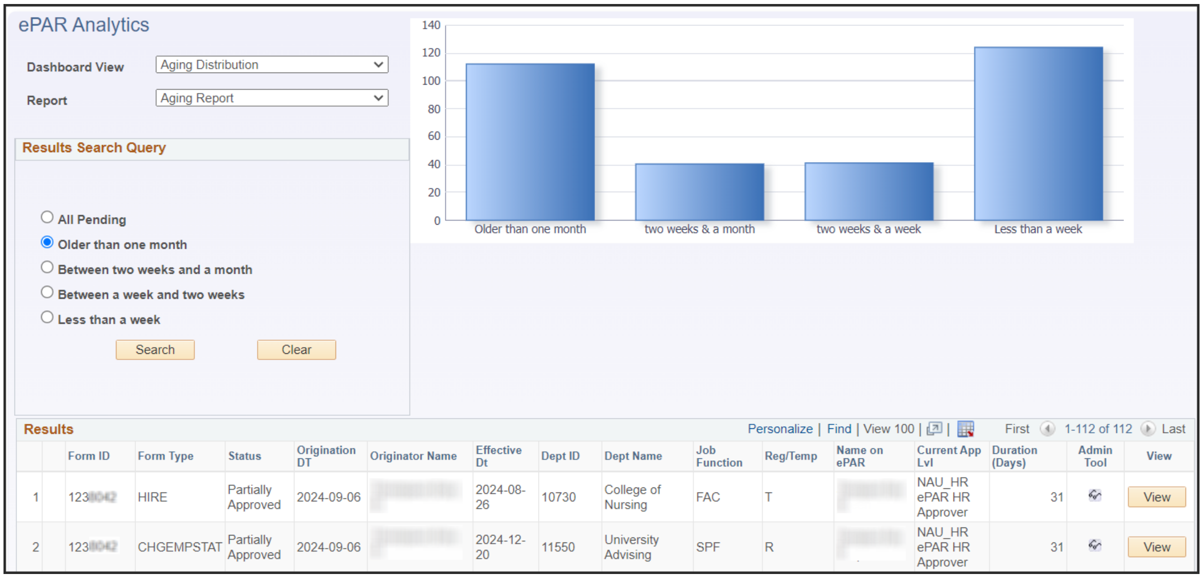
On the ePAR Analytics page, select the following items:

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

Then, select the timeframe you would like to view:


- **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.

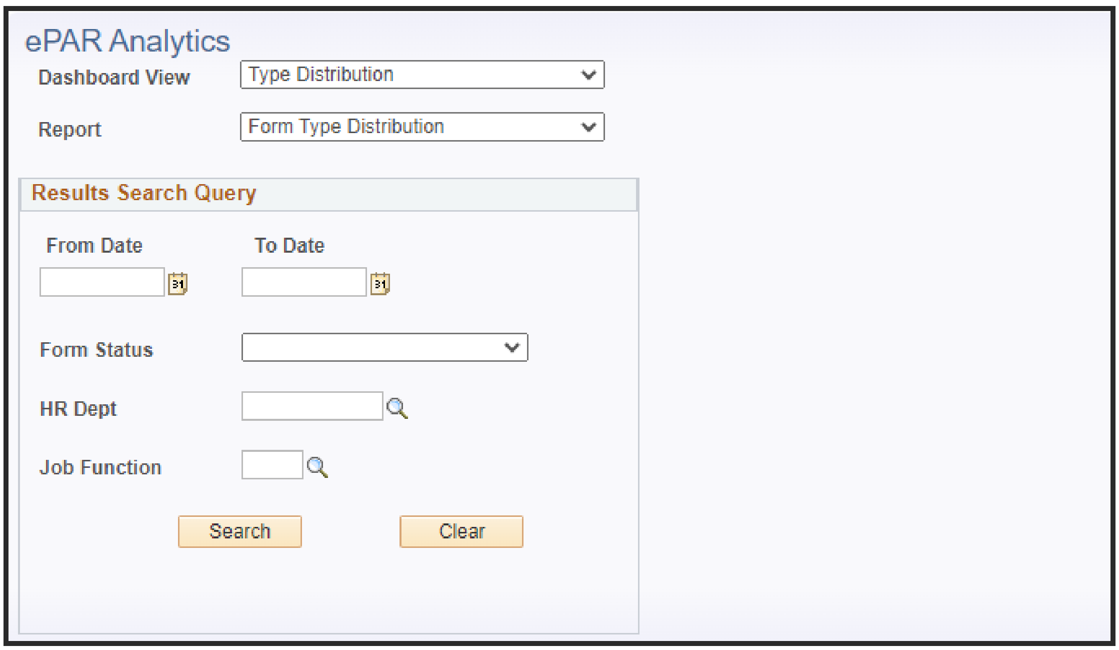
- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish;
  - Hire: Hiring an employee
  - Job Change: A change to an employee's existing position
  - Change Emp Status: Any change in an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

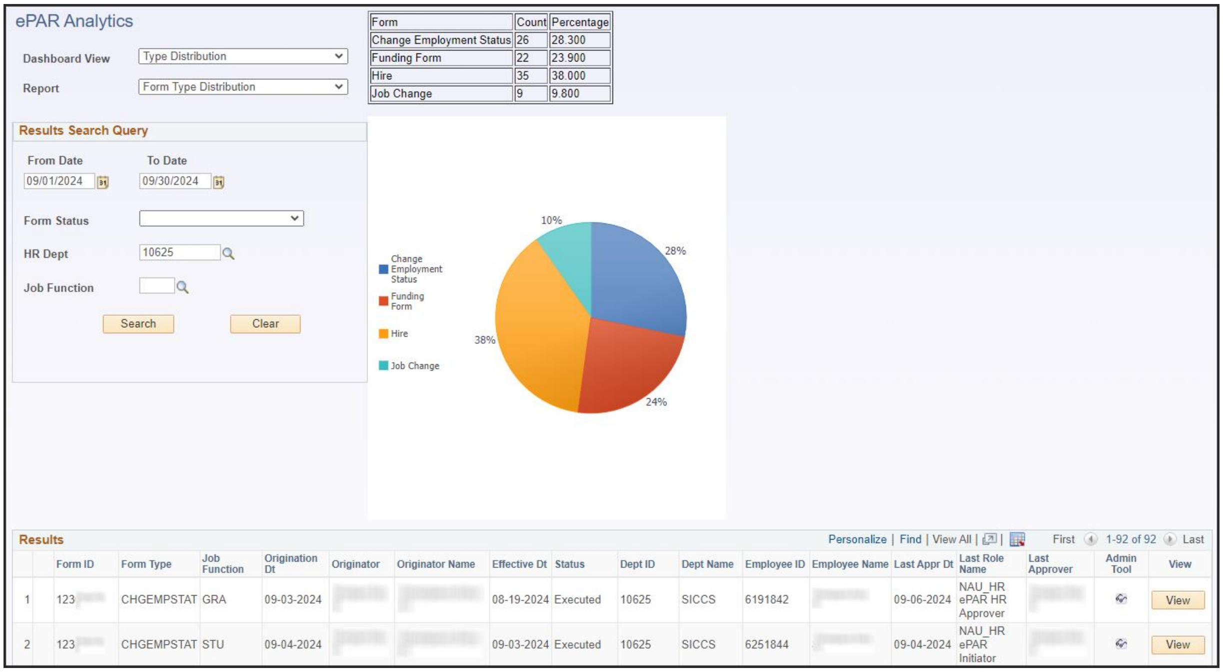
On the ePAR Analytics page, select the following items:

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




- **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.

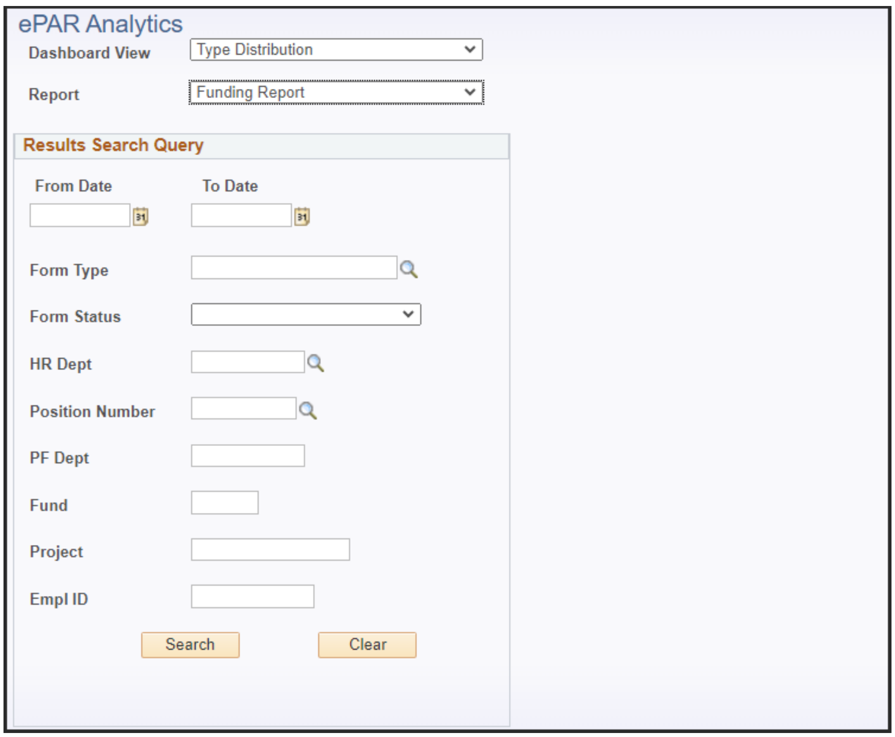
- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish;
  - Hire: Hiring an employee
  - Job Change: A change to an employee's existing position
  - ChgEmpStat: Any change in an employee's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

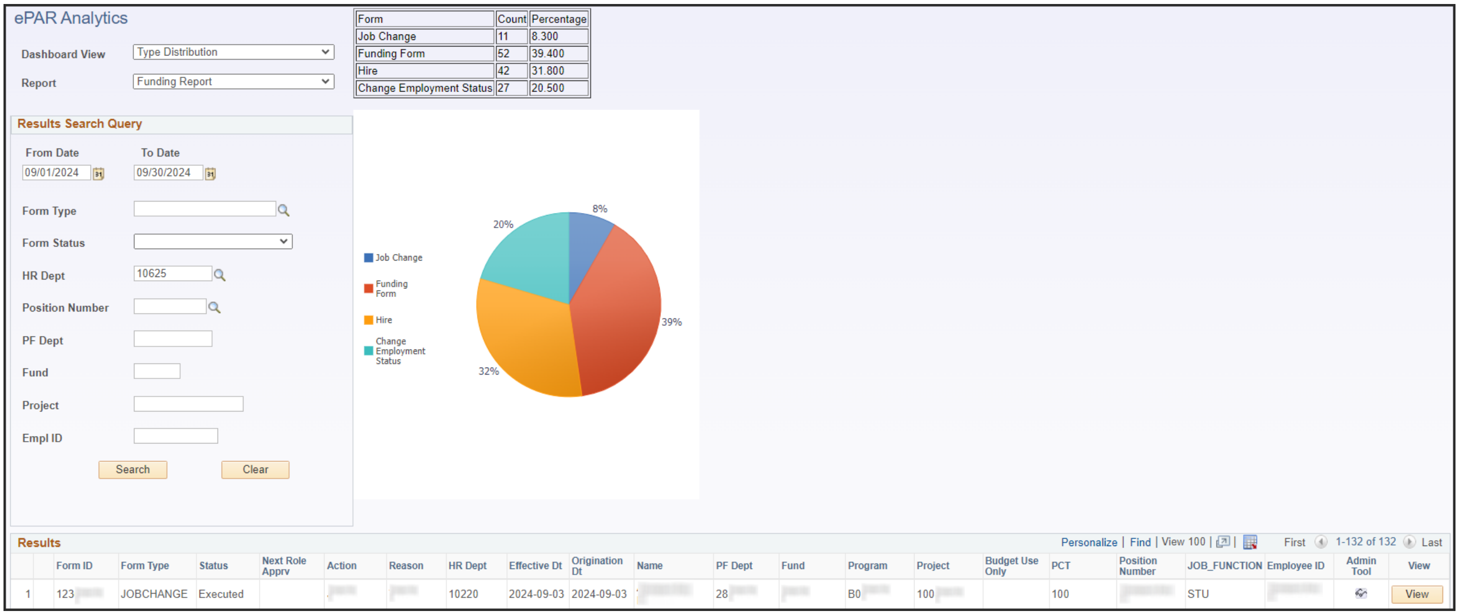
On the ePAR Analytics page, select the following items:

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




- **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:



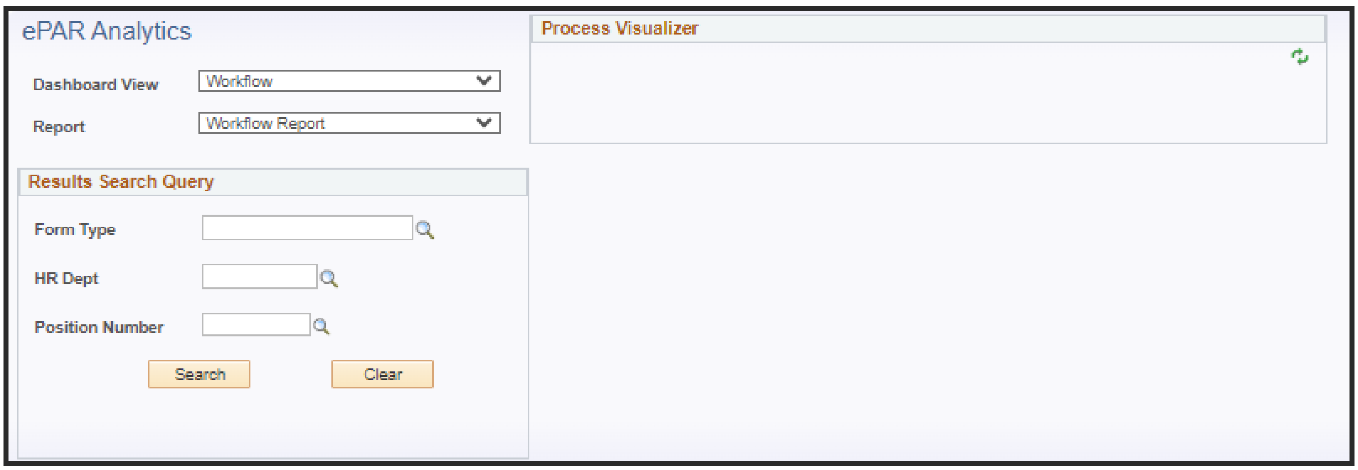

- **Form ID** – Also known as the ePAR Number, the Form ID is a unique number assigned to the form.
- **Form Type** – Identifies what the form was submitted to accomplish; Hire, Job Change, Funding, etc.
- **Status** – This is the current status of the ePAR.
- **Next Role Apprv** – The role of the next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

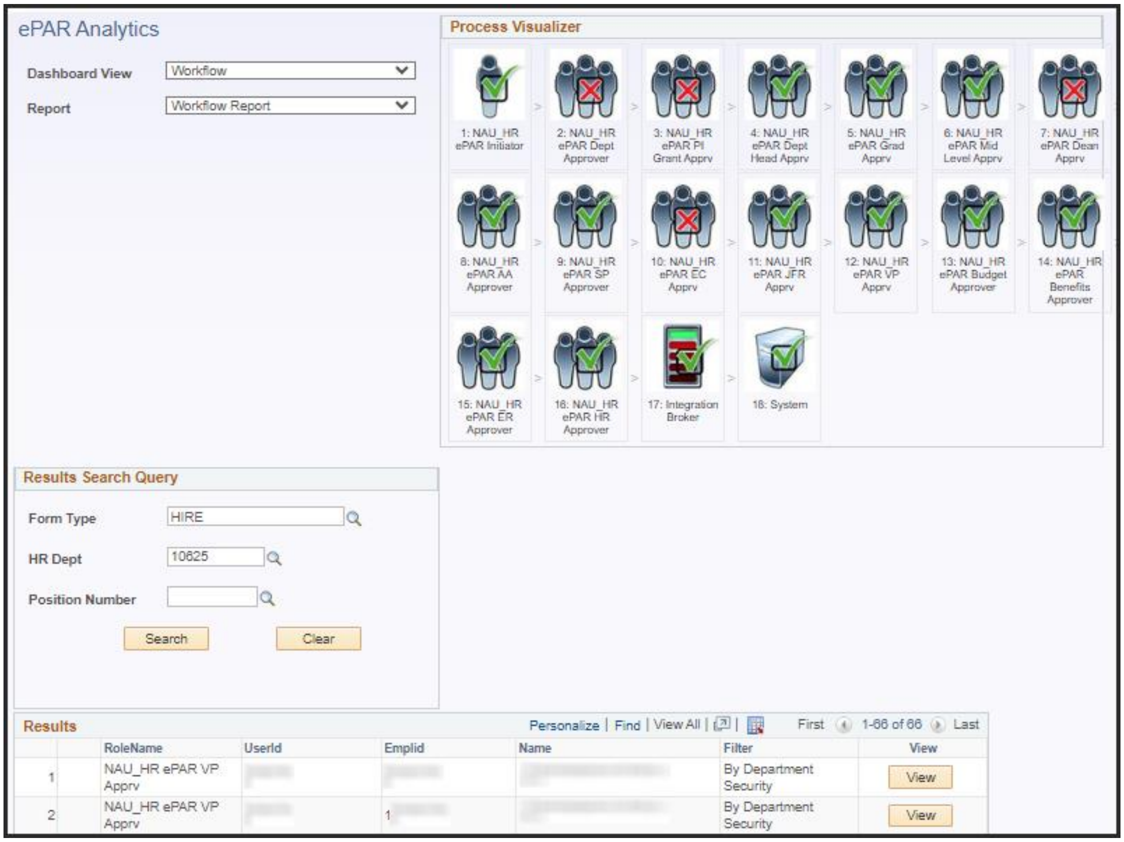
On the ePAR Analytics page, select the following items:

- **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.