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).

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.
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.

### 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](image-url)
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.

<table>
<thead>
<tr>
<th>Form</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire</td>
<td>4</td>
<td>33.30%</td>
</tr>
<tr>
<td>Funding Form</td>
<td>7</td>
<td>58.30%</td>
</tr>
<tr>
<td>Job Change</td>
<td>1</td>
<td>8.30%</td>
</tr>
</tbody>
</table>

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).

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.

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
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.

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”.

Contact
If you have any questions about the Funding Report after reviewing this guide, please contact the University Budget Office at budget@nau.edu or by contacting the Position Management Team, Vanessa Egan at 523-4696, Sharon Chief-Yazzie at 523-6443 or Barbara Jenkins at 523-4560.