

EPAF: If You Build It, They Will Key

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- Please avoid side conversation during the session

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Agenda

- What's EPAF?
- A little bit about NSU
- EPAF Project Planning
 - Identifying business processes
 - Process Owners & Users
- Project Implementation – if you build it, they will key!
- Review

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What is EPAF?

- Eliminate Paper Away Forever!

Or, the official term:

- Electronic Personnel Action Form

Series of rule and validation tables for guided data entry, approval path, and applying records.

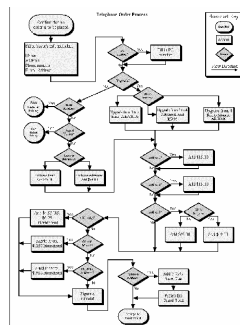
About NSU

Nova Southeastern University, Ft. Lauderdale, Florida

- Banner school since 1998
- Student, Finance, HR and Alumni
 - HR v8.2.4
 - Minimum HR self-service live
 - Pay stubs
 - Leave balances
- Approximately 4,000 employees
- Most HR activities still on paper

EPAF Project Planning

- Set up is half the battle
 - know WHAT you do
 - what you WANT to do
 - WHO is going to do it



EPAF Project Planning – Identifying Business Processes

Example: Hiring Student Employees

1. NSU Departments currently hire using Student Employment Authorization Forms (SEAFs)
2. Form is signed by authorized department individual
3. Form is routed to Student Employment office
4. Form is signed by Student Employment Manager
5. Form is routed to HR
6. HR enters data in NBAJOBS
7. Form is audited against system by Payroll

Good Phase I activity for NSU because Students already have ID numbers and biographical/demographical data entered.

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EPAF Project Planning – Process Owners & Users

Hiring Student Employees

1. Department Hire
2. Department Hire Authorization
3. Student Employment Manager
4. HR

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EPAF Project Planning – If You Build It, They Will Key!

- NTVACAT
- Set the Approval Category Code and Description
- Description and Sequence sets the order of display in self-service

Self-Service Approval Category Code Validation: NTVACAT - ID: (00000000)				
Approval Category Code	Description	Self-Service Description	Self-Service Display Sequence	Activity Date
ADNCT	Student Adjust Payment	Student Adjust Payment		10-OCT-2009
ADNCT	Adjust Payment Process			23-AUG-2002
GRADU	Gr-adj Update			10-APR-2009
GRADU	Update Grants			08-JUL-2004
LADIC	Locate RA ADP's			08-JUL-2004
LADIC	Labor Distribution Update	Labor Distribution Update	4	04-OCT-2009
LADIC	Labor distribution update			28-JUN-2002
OVERL	Overhead			27-AUG-2002
PRGGR	Prerequisite (Salary/Grade Chg)			28-NOV-2002
STACB	Student Add Job	Student Add Job	1	08-OCT-2009
STACB	Student Add Reg Job	Student Add Reg Job		08-OCT-2009
STACB	Student Add Reg Job	Student Add Regular Job		08-OCT-2009
STACB	Student Bi-Weekly Job	Student Bi-Weekly Job	2	08-OCT-2009
STACB	Student Change Job Type	Student Change Job Type	3	23-MAY-2009
STACB	Student Change Job Type			24-JUN-2001
STACB	Student Adjunct Payments			08-NOV-2009
STACB	Student New Hire	Student New Hire	5	08-NOV-2009
STACB	Student Termination	Student Termination	7	08-NOV-2009
STACB	Student End Job (Job end)	Student End Job (Job end)	9	08-OCT-2009
STACB	Student Job Rate Change	Student Job Rate Change	5	08-OCT-2009
STACB	Termination Rate Update			08-AUG-2002
STACB				08-AUG-2002

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- NTVAPTY to set the Approval Type Code(s), which is/are the different processes behind the Approval Category Code
- The Description and Self-Service Description should be entered following the Approval Type Code

Approval Type Code	Description	Self-Service Description	Activity Date
NTVAPTY	Student Adjust begin record	Student Adjust begin record	24 SEP 2009
NTVAPTY	Student Adjust end record	Student Adjust end record	24 SEP 2009
NTVAPTY	Student add job	Self up additional job for student	24 SEP 2009
NTVAPTY	Student Benefits Pay End	Student Benefits Pay End	24 SEP 2009
NTVAPTY	Student Benefits Pay Start	Student Benefits Pay Start	24 SEP 2009
NTVAPTY	Student change job type	Change student job type	24 SEP 2009
NTVAPTY	Student end job	End a student job	24 SEP 2009
NTVAPTY	Student job	Start a student job	24 SEP 2009
NTVAPTY	Student leave distribution	Student leave distribution	24 SEP 2009

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- NTRAPTY indicates which Banner Forms, Blocks and Fields are included with each Approval Type
- Approval Type field, enter the type

Form and Block	Description	Block	Description	Update Database Sequence Number
NTVAPTY	Employee Job Form	NTVAPTY	General Job Information Block	1.00
NTVAPTY	Employee Job Form	NTVAPTY	General Job Information Block	2.00
NTVAPTY	Employee Form	NTVAPTY	Employee Information Block	3.00

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EPAF Project Planning – If You Build It, They Will Key!

- NTRAPTY
Once the Form has been established, select the Block by following the same steps
- Field Code Validation to choose which fields are needed in which process.
— Go to Options on the top menu bar and select Field Information
— Make sure to indicate the Sequence Number and check if Required

Field	Description	PAF Display Sequence Number	Required
NTVAPTY	Pay Period Begin/End	1.00	Y
NTVAPTY	Enter Prg F/Cv Null	2.00	Y
NTVAPTY	Enter Org Changed	3.00	Y
NTVAPTY	Course Start/End	4.00	Y
NTVAPTY	Course Title/Number	5.00	Y
NTVAPTY	Payment Amount	6.00	Y

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- **NTRACAT, Approval Category Rule Form**
— This is where multiple types (tasks) are combined to make up one process

The screenshot shows the 'Approval Category Rule Form' for 'Student Adjunct Payment'. It includes sections for 'Associated Approval Types' and 'Mandatory Approval Levels'.

Approval Type	Description	Approval Type Entry Sequence Number	Default Entry
417400	Student Adjunct begin record	1	<input checked="" type="checkbox"/>
417401	Student Adjunct end record	2	<input type="checkbox"/>
417402	Student Adjunct update	3	<input type="checkbox"/>
417403	Student Adjunct delete	4	<input type="checkbox"/>

Level Code	Description	Level	Required Action
417400	Human Resources	1	Activity
417401	Human Resources	2	Activity
417402	Human Resources	3	Activity
417403	Human Resources	4	Activity

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- **Associated Approval Types section, all of the Approval Type Categories will be listed from NTVAPTY**
- **Select the Approval Types and enter Sequence Numbers that are associated with this process**

The screenshot shows the 'Approval Category Rule Form' for 'Student Adjunct Payment'. It includes sections for 'Associated Approval Types' and 'Mandatory Approval Levels'.

Approval Type	Description	Approval Type Entry Sequence Number	Default Entry
417400	Student Adjunct begin record	1	<input checked="" type="checkbox"/>
417401	Student Adjunct end record	2	<input type="checkbox"/>
417402	Student Adjunct update	3	<input type="checkbox"/>
417403	Student Adjunct delete	4	<input type="checkbox"/>

Level Code	Description	Level	Required Action
417400	Human Resources	1	Activity
417401	Human Resources	2	Activity
417402	Human Resources	3	Activity
417403	Human Resources	4	Activity

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- **Options on the menu bar, select Approval Type Default Values**
- **Identify corresponding Approval Category and Approval Type at the top section**
- **Select the Default Value and/or Defaults Overrideable**

The screenshot shows the 'Approval Category Rule Form' for 'Student Adjunct Payment'. It includes sections for 'Associated Approval Types' and 'Mandatory Approval Levels'.

Field Description	Default Value	Defaults Overrideable
Pay Period Requested		<input checked="" type="checkbox"/>
Enter City / ZIP Code		<input checked="" type="checkbox"/>
Enter City Changed		<input checked="" type="checkbox"/>
Enter State/Zip		<input checked="" type="checkbox"/>
Enter Title Number		<input checked="" type="checkbox"/>
Payment Amount		<input checked="" type="checkbox"/>
Check Location		<input checked="" type="checkbox"/>
Contract Type		<input checked="" type="checkbox"/>
Enter		<input checked="" type="checkbox"/>
Print		<input checked="" type="checkbox"/>

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- Field Code Validation to choose which fields are needed in which process.
- Field Information, indicate the Sequence Number and check of if Required

Field	Description	PAF Display Sequence Number	Required
NBRJOBS_EFFECTIVE_DATE	Pay Period Begin/End	1.00	<input checked="" type="checkbox"/>
NBRJOBS_BEGIN_DATE	Enter pps IF CV/Null	2.00	<input type="checkbox"/>
NBRJOBS_ORGN_CODE_TS	Enter Org Charged	3.00	<input type="checkbox"/>
NBRJOBS_PERS_CHG_DATE	Course Start/End	4.00	<input type="checkbox"/>
NBRJOBS_DESC	Course Title/Number	5.00	<input type="checkbox"/>
NBRJOBS_AMT_SALARY	Payment Amount	6.00	<input type="checkbox"/>

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EPAF Project Planning – If You Build It, They Will Key!

Electronic Approval Category Rules: NTRACAT: 8.0 (CAMPO001)

Approval Category: 41TAD0 Student Adjunct Payment

Default Value: NTRACAT: 8.0 (CAMPO001)

Approval Category: 41TAD0 Student Adjunct Payment

Approval Type: 41TAB0 Student Adjunct begin record

Field Description	Default Value	Defaults Overrideable
Course Start/End		<input checked="" type="checkbox"/>
Course Title/Number		<input checked="" type="checkbox"/>
Payment Amount		<input checked="" type="checkbox"/>
Check Location		<input type="checkbox"/>
Contract Type	0	<input type="checkbox"/>
Factor	1	<input type="checkbox"/>
Pers	1	<input type="checkbox"/>
Shp		<input type="checkbox"/>
Job Status	A	<input type="checkbox"/>
Job Change Reason	07001	<input type="checkbox"/>

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- Set the Mandatory Approval Levels at the bottom of the NTRACAT screen
- Select the appropriate Approval Level Codes for each transaction that is being created

Electronic Approval Category Rules: NTRACAT: 8.0 (CAMPO001)

Approval Category: 41TAD0 Student Adjunct Payment

Associated Approval Types

Approval Type	Description	Approval Type Entry Sequence Number	Defaults Edit
41TAB0	Student Adjunct begin record		
41TAD0	Student Adjunct end record		
41TAD0	Labor Distribution Update		

Mandatory Approval Levels

Level Code	Description
HR	Human Resources

Approval Level Codes

Level	Code	Description	Supervisor
40	DEPT	Dept	N
50	PROJ	PROJ	N
99	HR	Human Resources	Y
99	PROJ	PROJ	Y
30	MSR	Manager	N
20	PROG	Program Mgr	N

End OK Cancel

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EPAF Project Planning – If You Build It, They Will Key!

- NTRAUSG, NTRALVL, NTRROUT, NTRPROX

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EPAF Project Planning – If You Build It, They Will Key!

- All previous steps are the building blocks for the self-service form
- Submission of this form kicks off approval process
- Final NOPEAMA process applies job records

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Summary

- **KNOW YOUR PROCESSES!**
 - Must know which Banner forms are affected
 - Which fields on each form must be required entry or can default
- **Build to your user level**
 - Balance your categories to be specific to minimize entry but broad enough to cover more than one transaction

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Questions & Answers

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Thank You!

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