EPAF: If You Build It, They Will Key

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Session Rules of Etiquette

- **Please turn off your cell phone/pager**

- **If you must leave the session early, please do so as discreetly as possible**

- **Please avoid side conversation during the session**

Thank you for your cooperation!

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**

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.
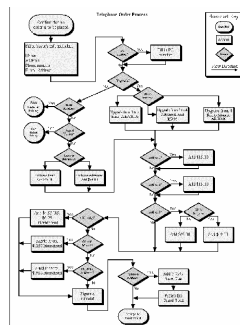

About NSU

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.

EPAF Project Planning – Process Owners & Users

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

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**

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

- **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**

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

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

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

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

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

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

- **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**

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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**

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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	
NBRJOB_BEGIN_DATE	Enter PPB if CV Null	2.00	
NBRJOBS_ORGN_CODE_TS	Enter Org Charged	3.00	
NBRJOBS_PERS_CHG_DATE	Course Start/End	4.00	
NBRJOBS_DESC	Course Title/Number	5.00	
NBRJOBS_ANN_SALARY	Payment Amount	6.00	

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Electronic Approval Category Rules NTRACAT 8.0 (CAMP0801)

Approval Category:　4STADJ　Student Adjunct Payment

Default Values NTRACAT 8.0 (CAMP0801)

Approval Category:　4STADJ　Student Adjunct Payment
Approval Type:　4STABG　Student Adjunct begin record

Field Description	Default Value	Defaults Overrideable
Course Start/End		✔
Course Title/Number		✔
Payment Amount		✔
Check Location		
Contract Type	O	
Factor	1	
Pays	1	
Step		
Job Status	A	
Job Change Reason	07001	

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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 (CAMP0801)

Approval Category:　4STADJ　Student Adjunct Payment

Associated Approval Types

Approval Type	Description	Approval Type Entry Sequence Number	Defaults Exist
4STABG	Student Adjunct begin record	1	
4STAEN	Student Adjunct end record		
LDUPDT	Labor Distribution Update		

Approval Level Codes

Find%

Level	Code	Description	Supervisor
10	AUDIT	Audit	Y
40	DEAN	Dean	N
90	HPD-HR	HPD-HR	N
99	HR	Human Resources	Y
98	HRENTR	HR Entry	Y
30	MGR	Manager	N
20	PROG	Program Mgr	N

(Find) (OK) (Cancel)

Mandatory Approval Levels

Level Code	Description
99	Human Resources

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- **NTRAUSG, NTRALVL, NTRROUT, NTRPROX**

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- **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

Questions & Answers

Thank You!

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