



First Fridays

with the

University Budget Office

UNT[®]

UNIVERSITY
OF NORTH TEXAS[®]

EST. 1890

February, 2020

Agenda

- Icebreaker
- ePar
- Cognos 11
- Announcements/Reminders
- Open Forum – Q&A

Icebreaker:

Who Said It?

“I feel the need – the need for speed!”

Welcome Javier Santillan

- Frisco Cohort
 - Project Design and Analysis Major
- Budget Office Spring 2020 Intern





ePAR

February 7, 2020

UNT's First Fridays

Presented by Dorothy Cummings, Records Manager



ePAR

Items we will cover:

- 1. Workflow**
- 2. FAQs**
- 3. Updates**

ePAR Workflow

Workflow lists the approvers and reviewers for a transaction. Approvers are required to take action in order for the transaction to move forward. They can either approve, deny, or push the transaction back. No action is required of reviewers. They are notified via email and can review the transaction at their convenience.

When viewing a submitted transaction through the *Display a submitted ePAR* page, the workflow will show where the ePAR is pending approval.

Also noted is the specific person who approved the transaction and the date and time of their approval.

Employee Transaction



UNT’s administrative offices determine which approvers should appear in the ePAR based on the transaction type.

Employee Transactions

Hire Without Changes		Hire With Changes		Task Appointment	
Approver	Criteria	Approver	Criteria	Approver	Criteria
1. Proj ID	Funded by at least one project	1. Proj ID	Funded by at least one project	1. Proj ID	Funded by at least one project
2. Dept ID	Funded by at least one deptid	2. Dept ID	Funded by at least one deptid	2. Dept ID	Funded by at least one deptid
3. Budget Officer	Dept has a Budget Officer	3. Budget Officer	Dept has a Budget Officer	3. Budget Officer	Dept has a Budget Officer and job code is NOT 1690
4. Dept Head	Always include	4. Dept Head	Always include	4. Dept Head	Always include
5. Dean/AVP	Faculty, staff treated like Faculty, or Grad Student	5. Dean/AVP	Faculty, staff treated like Faculty, or Grad Student	5. Research	Funded by a grant
6. Research	Funded by a grant	6. VP	Staff and its not a location or reports to only change	6. VP Research	Fund is 805009
7. VP Research	Fund is 805009	7. Financial Aid	College work study	7. HR Compensation	Job code is NOT 1690
8. Campus HR	Staff or non-student hourly	8. Research	Funded by a grant	8. Provost	Job code is 1621
9. Provost Office	Faculty, Adjuncts, staff treated like Faculty, or Grad Student	9. VP Research	Fund is 805009		
		10. Budgets	Staff or it's a staff position treated like faculty and its not a summer hire		
		11. Career Center	Student or college work study		
		12. Campus HR	Staff, non-student hourly, or students paid on a salaried bases but are not required to be grad students, not in Athletics dept		
		13. Provost Office	Faculty, staff treated like Faculty, Adjunct or Grad Student not in Athletics dept		



Temporary Work Around

1 Job Data 2 Display a submitted ePAR 3 Modify a Person

https://hrpd.unt.edu/ps/ps_7/EMPLOYEE/HRMS/c/HCM_APPROVAL_WORKFLOW.EOAW_ADMIN_MON.GBL?&skipnav=1

Favorites Main Menu Campus Self Service Display a submitted ePAR

Enterprise Information System dc0976 on HRPD (ps-hrpd-bkapp01.its.unt.edu) - Production 01/24/2020 11:26:28 Home Worklist Add to Favorites Sign Out

Navigator Search Advanced Search Last Search Results

New Window | Help

Display a submitted ePAR

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Here I have three windows of the HR system open. If the search results are only displaying 1 transaction like you described, I would close that window (number 2), and open a new window to execute a new search. That usually works for me as I, like you, do not want to have to log out every time this happens.



Effective Dates

- 1) What is it used for?
- 2) How do I know which payroll the transaction will hit?
- 3) What do I do when I have a new hire who starts the first working day of the month and the 1st day of the month is a weekend?

- 1) Effective date is used to determine when the action begins (or ends)
- 2) Final approval date of an ePAR determines which payroll it will affect (see next slide)
- 3) If the first day of the month falls on a holiday or weekend, the official hire date will be the 1st. The ePAR system is programmed to default to the 1st for months that fit this criteria

These are the months for year 2020:

- February
- March
- August
- November

Offer letters should reflect official hire date and physical start date



In this example the person is getting a pay raise and the raise starts on 2/15. The paycheck the employee will see the increase on, will be determined by the date the transaction is approved.

Select Action and Employee

ePAR Header

Business Unit: NT752	Home Deptid: 121400	Last Update Date/Time:	by:	ePAR Help Resources
PAR ID: NEXT	Dance & Theatre	Submitted Date/Time:		Next >>
PAR Status: Initiated		Created by: Cummings,Dorothy	dc0976	
Type of ePAR: Employee Transaction		Phone: 940/369-6387		
Action: Employee Change within Dept				

Empl ID: ~~10051020~~ Empl Rcd: 0 Name: ~~William J. Rouse~~ Please enter effective date to populate current data [Attachments](#)

Effdt: 02/15/2020

Expand/Collapse All

Job Data

Current	New
Home Deptid: 121400	Home Deptid: 121400
Dance & Theatre	Dance & Theatre
Position Number: 00002100	Position Number: 00002100
Employee Status: Active	Employee Status: Active
Job Code: 50010	Job Code: 50010
Administrative Coordinator	Administrative Coordinator
Location: DENTON	Location: DENTON
Salary Grade: 09	Salary Grade: 09
Std. Weekly Hours: 40.00	Std. Weekly Hours: 40.00
FTE: 1.00	FTE: 1.00
Annual Rate: \$40,601.88	Annual Rate: \$54,000.00 (12)
Monthly Rate: \$3,383.49	Monthly Rate: \$4,500.00

[Identify Source of Funds](#)

Reason(s) for Salary Change:

Check all that apply - REQUIRED

- Merit
- Market

February 2020

Payroll Deadlines for ePAR

Transaction Type	Pay Period	Final Approval Deadline	Pay Date
Semi-Monthly Salaried	2/1 - 2/15	Tuesday, February 4, 2020	2/18/2020
Semi-Monthly Supplemental*	2/1 - 2/15	Friday, February 14, 2020	2/25/2020
Monthly Supplemental*	1/1 - 1/31	Friday, February 14, 2020	2/25/2020
Monthly Salaried	2/1 - 2/29	Tuesday, February 18, 2020	3/2/2020
Task Payments	2/1 - 2/29	Tuesday, February 18, 2020	3/2/2020
Stipend Payments	2/1 - 2/29	Tuesday, February 18, 2020	3/2/2020
Semi-Monthly Salaried	2/16 - 2/29	Tuesday, February 18, 2020	3/2/2020
Hourly (ePAR)	1/16 - 1/31	Tuesday, February 4, 2020	2/18/2020
Hourly (ePAR)	2/1 - 2/15	Tuesday, February 18, 2020	3/2/2020
Secondary Payroll*	2/1 - 2/29	Friday, February 21, 2020	3/2/2020
Supplemental*	2/1 - 2/28	Monday, March 2, 2020	3/6/2020

NOTE: Excludes Hourly (ePAR), see Time and Labor Deadlines Below.

Hourly Deadlines for Time and Labor

Payroll	Pay Period	Final Approval Deadline	Pay Date
Regular Hourly	1/1 - 1/15	Tuesday, January 21, 2020	2/3/2020
Secondary Hourly*	1/1 - 1/15	Friday, January 24, 2020	2/3/2020
Supplemental*	1/1 - 1/15	Monday, February 3, 2020	2/10/2020
Regular Hourly	1/16 - 1/31	Wednesday, February 5, 2020	2/18/2020
Supplemental*	1/16 - 1/31	Friday, February 14, 2020	2/25/2020
Regular Hourly	2/1 - 2/15	Wednesday, February 19, 2020	3/2/2020
Secondary Hourly*	2/1 - 2/15	Friday, February 21, 2020	3/2/2020
Supplemental*	2/1 - 2/15	Monday, March 2, 2020	3/6/2020

NOTE: Supplemental payroll will be processed for late approvals. No additional hourly payrolls will be processed until the next regular payroll date.

Salaried Payroll Deadlines for Time and Labor

Payroll	Pay Period	Final Approval Deadline
Monthly & Semi Monthly	2/1 - 2/29	Thursday, March 12, 2020
Monthly & Semi Monthly	3/1 - 3/31	Friday, April 10, 2020

Deadline is for all time to be entered for salaried employees.

**The Secondary and Supplemental pay dates are not mandated by the state and are subject to delay without notice due to unforeseen circumstances.*



Post A Job / People Admin

With the upgrade of PeopleAdmin, please do not use the ePAR system for indicating you want to post a job using either

1. Post a Job ePAR transaction type
2. Post a job Upon final approval checkbox located on some of the ePAR pages

Instead, you must go directly into PeopleAdmin to post your jobs.

We are working to remove the checkbox from the ePAR pages for non-UNT Faculty jobs, but in the meantime, please ignore this as the Talent Acquisition (HR Employment) team is not notified of your intent to post a job so no action will be taken unless you go to PeopleAdmin to take the appropriate action.

ePAR enhancements

- ❖ Reclassification
- ❖ Add effective date to search page
- ❖ Notify initiators of any pending transactions for employee and/or position number
- ❖ Allow future dated vacant position changes
- ❖ Allow approvers to add comments without approving the transaction



...More details will be provided regarding the enhancements at a later date

Questions



Cognos 11

February 7, 2020



Major Differences

Cognos 10 – Report Landing Page

IBM Cognos Viewer - FIN001 - Budget Overview

Angulo, Luis Alberto Log Off | Home | Back | About IBM

Keep this version | Print | Add this report

UNT | SYSTEM™

Budget Overview

Budget Period: 2020

[Click here for all transactions that make up this report](#)

Department: 928000 - Budget & Planning (SY769) Fund Category: 105 - Educational & General Fund: 805001 - State Approp-BSA

Account	Function	Current Budget	Actuals	Encumbrance	Pre-Encumbrance	Balance
Expense						
D5014 - Salaries -Staff	550 - Institutional Support	115,805.33	47,774.45	66,884.27	0.00	1,146.61
C5014 - Staff Salaries Total		115,805.33	47,774.45	66,884.27	0.00	1,146.61
D5031 - Wages	550 - Institutional Support	0.00	580.00	0.00	0.00	(580.00)
C5030 - Wages Total		0.00	580.00	0.00	0.00	(580.00)

Major Differences

Cognos 11 – Report Landing Page

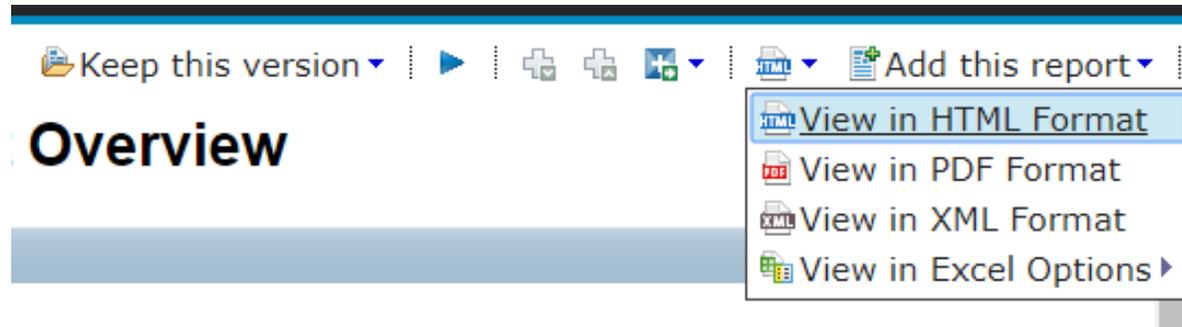
Click here for all transactions that make up this report

Department: 928000 - Budget & Planning (SY769) Fund Category: 105 - Educational & General Fund: 805001 - State Approp-BSA

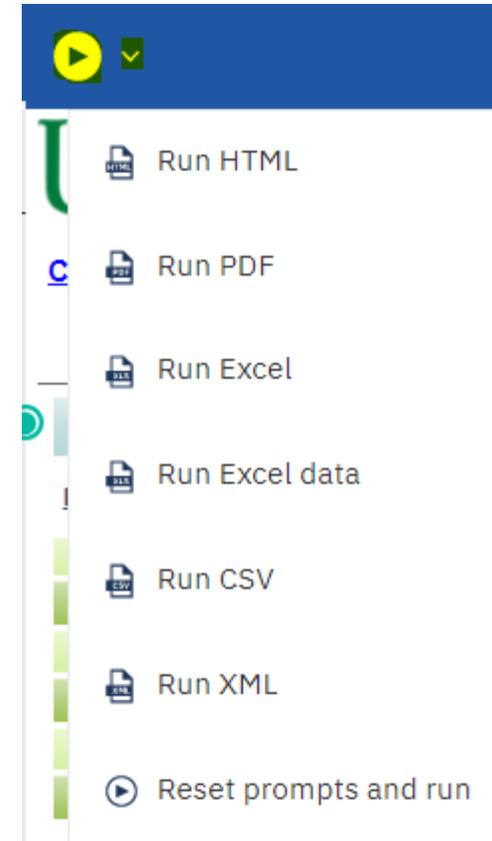
Account	Function	Current Budget	Actuals	Encumbrance	Pre-Encumbrance	Balance
Expense						
D5014 - Salaries -Staff	550 - Institutional Support	115,805.33	47,774.45	66,884.27	0.00	1,146.61
C5014 - Staff Salaries Total		115,805.33	47,774.45	66,884.27	0.00	1,146.61
D5031 - Wages	550 - Institutional Support	0.00	580.00	0.00	0.00	(580.00)
C5030 - Wages Total		0.00	580.00	0.00	0.00	(580.00)
D5050 - Payroll Related Costs	550 - Institutional Support	38,140.31	345.25	0.00	0.00	37,795.06
C5050 - Payroll Related Costs Total		38,140.31	345.25	0.00	0.00	37,795.06
Expense - Total		153,945.64	48,699.70	66,884.27	0.00	38,361.67
Net Total		(153,945.64)	(48,699.70)	66,884.27	0.00	38,361.67

How to Run report in different formats

Cognos 10



Cognos 11



Under the hood

- **Cognos 10**: Single server, only one gateway and one dispatcher. If a single part of the system malfunctions, no reports...
- **Cognos 11**: Multi-Server architecture, multiple gateways and dispatchers, minimizing down time for the user. The system has backups and redundancies. If a piece fails, another server takes its place. If we find that we have more reporting requests than the servers can handle, we can easily clone the dispatchers to provide more reporting power.

How to close the report using the “Switcher” menu

Cognos 11



Newly surfaced capabilities

- **Reporting Views** - A shortcut to existing report with saved parameters
- **Scheduling Reports** – Schedule reports to go to you or your cohorts
- **My Content** - a place to store your reporting views and schedules
- **Bursting of reports** – One report sent to multiple people, everyone only sees their data.

Announcements



Announcements & Reminders

UNT Surplus

- Department Previews are currently only available on Thursdays. Please do not come view during Public Sale on Tuesdays.
- **Effective March 2nd, Department Viewings will be moved to Mondays** from 9a.m. to 1p.m. This will allow departments to preview surplus items before they become available for public sale on Tuesday.

Announcements & Reminders

Telecom Billing Update

- Pinnacle Bills now contain the Service Now Ticket number for non-monthly charges. The ticket # is located in the “bill note section.”
- Departments will begin seeing the change with their January monthly service bill and will see overall consistency beginning with the February bill.

Announcements & Reminders

Insights Encumbrance Management Online Tutorial

- [Encumbrance Management Quick Reference Video](#)
- Will you be using Insights? Pick up your Insights magnet before leaving.

Announcements & Reminders

Covering Payroll on Position Moves

- When moving funding from Fund 830001 Designated Tuition M&O for salaries, you must also move 28.5% to cover fringes* from Designated Tuition M&O.
- **Example:** Department XYZ has an existing FTE paid on Fund 830001 that it wants to increase by \$10,000 using M&O funds, not salary savings.
 - The Department will need \$12,850 (\$10,000 Salary + \$2,850 for Fringes) to cover the salary increase.

*Fringe estimate of 28.5% is university average for salaried positions.

Announcements & Reminders

New FTE on Centrally Funded Sources

- New FTE paid on centrally funded sources must be requested and approved during the budget process for FY21.
 - Creating a new FTE from M&O funds will not be approved
 - Moving existing FTE from self-paid to centrally funded will not be approved
 - You are allowed to utilize permanent salary savings to increase salary and or create new FTE on centrally funded sources.

Announcements & Reminders

Permanent Adjustments Deadline Friday, March 06

- Permanent adjustments **must reach final approval** by Friday, 03/13/20.
- Permanent adjustments will be reflected in the Hyperion FY21 Seed Budget.
- After March 13 through year end, all ABAs will be processed as one-time adjustments regardless of whether the “Permanent” option is selected.

Visio Organization Chart Training

- Learn the skills necessary to create and edit Organization Charts in Visio 2016. Explore two different methods in a lab setting with practice files, help from instructors and handouts.

Registration Steps:

1. Go to unt.bridgeapp.com
2. Click on the Training Calendar tab
3. Select the Agenda View on the right side of the screen
4. Search for “**Visio Organization Chart Training**”
5. Click Register.
6. Download the invite and add the class to your calendar!

Training Date

Thursday, 02/27

9:30a.m. – 11:00a.m.

GAB 550A

Are you responsible for
updating Organization
Charts for your team?



UNT[®]

UNIVERSITY
OF NORTH TEXAS[®]

EST. 1890

**Thank You
& Happy
Holidays!!!**