Getting Started

FHR Navigator Quick Guide

Contents

Getting Started in FHR Navigator

Welcome to FHR Navigator—an enterprise software solution that combines managing all HR functions in one program. In this EconSys Quick Guide there are brief instructions for each of the functions: On-boarding, Retirement/Separation/Benefits. Forms Manager is an integral part of each of these functions. For more detailed information on individual modules, look under Quick Guides in the Resources link on your left side menu. And for even more detailed information on the retirement calculator, see the FHR Navigator User's Guide in the Resources screen (click on "Resources").

Note for FRB Web © users who are transitioning to FHR Navigator: **FRB Web is now found as the Retirement Calculator in the left side navigation menu. Some functions within the calculator may appear and may be accessed on the right side menu. The former iForms function is part of Forms Manager**. All HR employee users will need to complete the Personal Information Screen, which was formerly the Employee Set up Screen. HR users need to complete the Specialist and Payroll Office screens before beginning to work on a case. Specialist and Payroll set up screens are accessed through Forms Manager on the left side menu or through the On-Boarding module.

Logging in and Obtaining Passwords

The internet URL for FHR Navigator is https://fhrnavigator.com/client/[your agency]. EconSys provides each agency their Login Page and specific URL as they begin using FHR Navigator. Below is an example of a Login page created for a client agency.

Step 1 Logging into FHR Navigator

Login information note: All first -time FHR Navigator users must click on "First-time user" on the Login page, ***including those who are transitioning from FRB Web©***

When you click on "First Time User" a screen entitled "Establishing Login for New User (Step 1 of 2) will open. You will be prompted to enter the following information:

- Last name
- Social Security Number
- Date of Birth

Click on Submit. The program will check the database and verify that you are a member of the client agency. If your record is found, "Establishing Login for New User (Step 2 of 2) will appear with instructions for creating your username and password. (If your record is not found, you will be directed to contact your HR office for assistance.)

- Enter and confirm your email address
- Enter desired username and confirm – The username you select will not change as long as you remain with the same agency. You are free to select any username you wish.
- Enter and confirm your desired password following the instructions on the screen --**At any time in the future if you cannot remember your password, click on "Trouble Logging In" and the program will give you instructions for creating a new password.**

When you have created your username and password, click on Submit. You will then receive a message to "Click Here to Return to Login Page." Click on this line and you will return to the Login page.

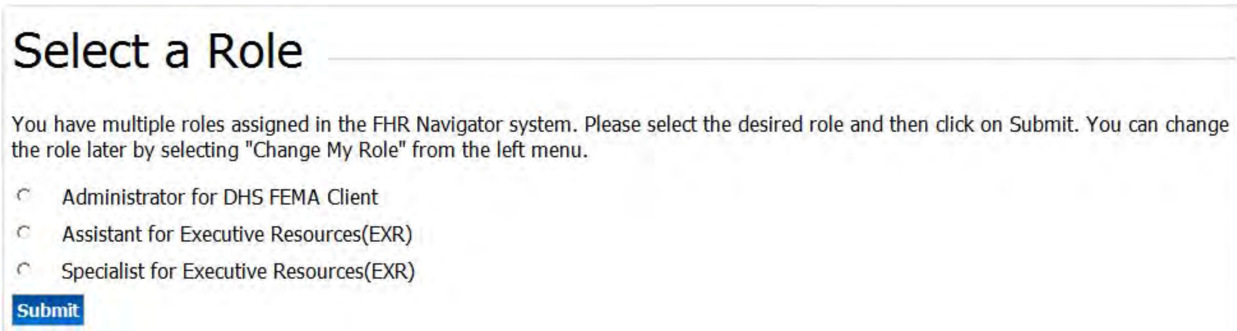
To login:

- Enter your username and password.
- Read the "Terms of Usage" and "Licensing Agreement" and check the box to indicate that you accept them.

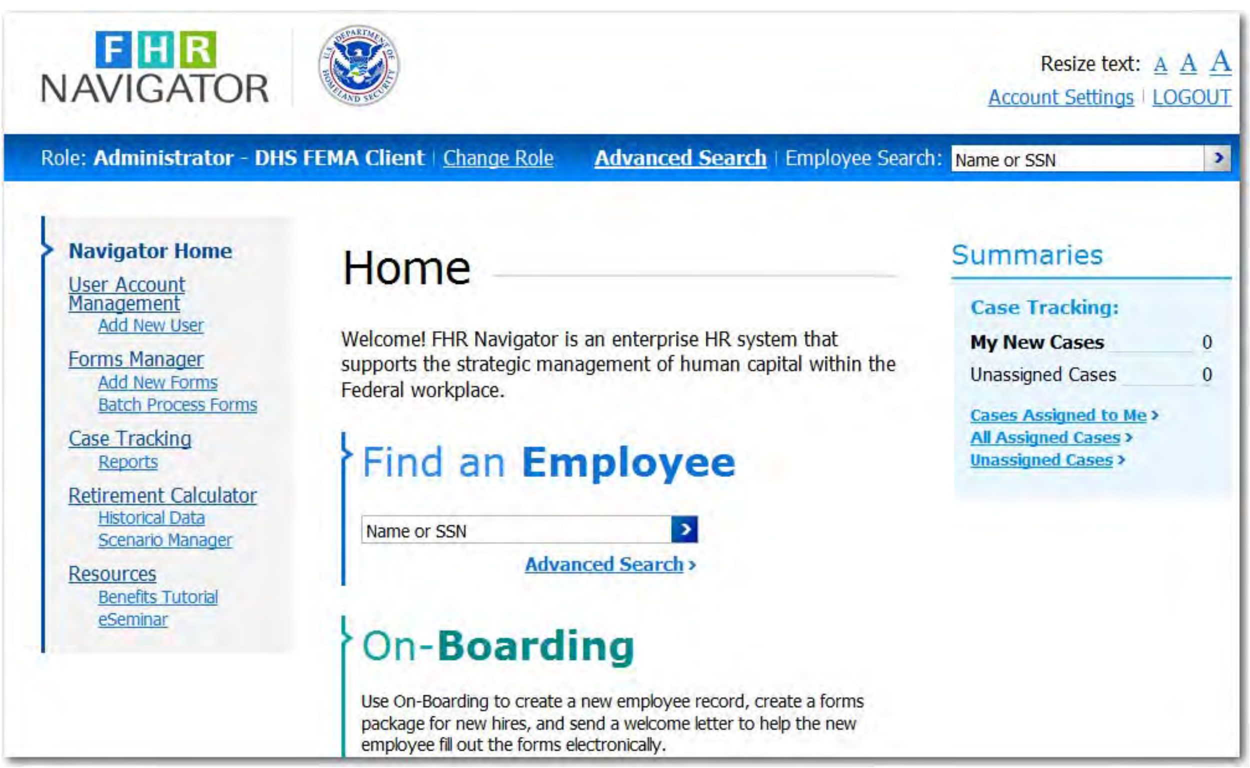
- Click “Login” button to access FHR Navigator.

Step 2 Select a Role

The next screen to appear is “Select a Role.” *This screen appears only if you have more than one role*. Most users will have one role such as HR Assistant or HR Specialist. However, it is possible for a user to have multiple roles such as HR Specialist and Systems Administrator. Select the role you wish to use and then click on Submit. If you have multiple roles, you can switch roles at any time by clicking on “My Account” that appears at the top of screens throughout FHR Navigator.

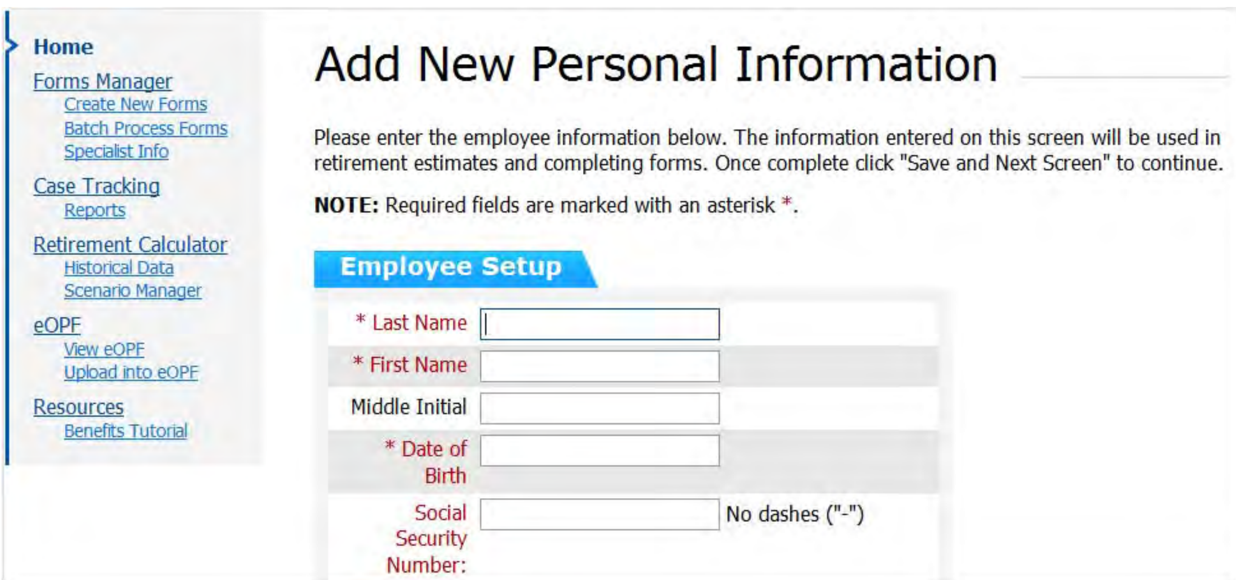


- The next screen to appear will be the FHR Navigator Home page.



Step 3 Find an Employee

- After you have selected your role, the next screen to appear is *FHR Navigator Home.* On this screen you select a function to perform; however, *before you select a function you must first either select an employee using "Find an Employee," or add a new employee*. The program must know whose record you are working on when you select a function. You may select a different employee at any time by entering a name or SSN in the blue bar at the top of the screen next to "Employee Search."
- To add a new employee, click on "Individual On-Boarding" under "On-Boarding" and the Personal Information screen will appear. This screen allows users to create new employee records. Common data on this screen such as date of birth, SSN, home address, etc., will flow to all the forms in Forms Manager.
- For each new employee record completed the final step is to select the "Group" or the POI that is the employing office for the employee.



Step 4 Select a Function

On the FHR Navigator Home page you will see links for the functions available to you depending on the features your agency has purchased. You may choose the HR functions you wish to use by clicking on a function on the left side FHR Navigator menu. Retirement Calculator and Forms Manager are integral features of FHR Navigator. On-Boarding, Case Tracking and Reports, and hiring modules are options that may appear depending on the options the agency has purchased.