

Quick Guide for Reports Function

FHR Navigator

Contents

- I. Introduction 2
 - Reports Available in the Reports Function 2
 - Access to FHR Navigator Reports..... 4
- II. Filtering FHR Navigator Case Tracking Reports..... 4
 - Cases Grouped by 4
 - Other Important Reports 5
 - Non-Typical Reports..... 5
 - Reports Search Filters 5
- IV. Report Formats 6
 - Report Example #1: Cases Grouped by Case Type..... 6
 - Report Example #2: Step Duration Report 9

I. Introduction

FHR Navigator has a variety of different reports that are associated with certain modules for which customers need management information. This document describes how to use the Reports Functions of FHR Navigator to efficiently access these valuable accessory tools.

Note: If your agency does not subscribe to particular modules (for example, Case Tracking) those reports will not be available to you. However, all FHR Navigator customers have access to the “Users” Report. A link to the Reports function will be found on the left-side menu.

Reports Available in the Reports Function

The list below is illustrative, since management reports continue to be developed and modified. It represents typical report titles and descriptions available to FHR Navigator users, depending on the modules their agency subscribes to, and on the viewing privileges afforded to their “role” by their agency.

Reports Home

Case Tracking

[Cases and Details Grouped by Status \(#320\)](#)

This report lists cases grouped by the current status of the case and within a specified date range. The date range tells the program to select all cases that have been edited within the specified date range. This report also displays all the details of a case.

[Cases Assigned to Me \(#325\)](#)

This report lists all cases assigned to the user running the report. The cases may be open, closed, or both. For each case, the report shall display only the last detail/step of the case.

[Cases Grouped by Activity \(#497\)](#)

This report lists cases grouped by activity (e.g., process forms).

[Cases Grouped by Activity with all Case History \(#363\)](#) This report lists all case history grouped by activity. This report includes all case history.

[Cases Grouped by Case Detail/Step \(#316\)](#)

This report lists cases grouped by case detail/step (e.g., Process Forms).

[Cases Grouped by Case Owner \(#303\)](#)

This report lists all cases grouped by their owners for a specific role (e.g., HR Specialist). For each case, the report shall display only the last detail/step of the case.

[Cases Grouped by Case Type \(#304\)](#)

This report lists all cases grouped by their case type (e.g., Retirement).

Cases Grouped by Status (#321)

This report lists cases grouped by the status of the case and within a specified date range. The date range tells the program to select all cases that have been edited within the specified date range.

Cases with a Particular Step in Case History

Search all cases by a step name to find cases that have at least one step that matches or partially matches your search criteria in the case history. You can search by the full name of the step or search by part of the step name.

Cases with Specific Step (#302)

This report lists cases that have a particular combination of case type, activity, and detail/step. For each case, the report shall display only the last occurrence of the detail/step indicated in the parameter.

Number of Week Days between Two Steps (#310)

This report displays the number of week days between two steps in a case. For each case, the report shall display only the last occurrence of the detail/step 1 and the last occurrence of the detail/step 2. This report ignores cases where the last occurrence of step 1 is after the last occurrence of step 2.

Open Cases Number of Weekdays (#324)

This report lists open cases and the number of weekdays they have been open from the time they were created until today. There is an optional date range that tells the program to select all cases that were created within a specified date range.

Unassigned Cases (#382)

This report lists all unassigned cases grouped by the case type.

Hiring

Announcements Applied To (#24)

List all vacancy announcements applicants have applied to. Can search by applicant name and date applied date range.

Certificate Expiration (#183)

This report lists all Certificates that are about to Expire or those that have already expired.

Delegated Examining Quarterly Workload Report (#223)

This report gives the details of Delegated Examining Quarterly Workload.

Recruitment Requests Grouped by Organization

This report lists Recruitment Requests grouped by organization.

Vacancy Announcements Closing Report

This report lists all open vacancy announcements that close within a date range and is ordered by soonest-to-close first. It also includes additional filters such as occupational series, title, grade, and others.

PD+

Staffing Plan Report (#140) This report gives the details of the Staffing Plan.

Users

FHR Navigator Users and last login (#349) This reports lists all users (with non-employee role) and the last time they logged into FHR Navigator.

ALERT: This report contains ALL users in your agency.

Access to FHR Navigator Reports

User Account Administrators have the capability to designate which reports are accessible to each “role” in their agency. Administrators should refer to the **User Account Administration Quick Guide** for instructions.

II. Filtering FHR Navigator Case Tracking Reports

The largest group of FHR Navigator reports pertain to the Case Tracking module. Depending on the needs of the manager, reports can be filtered in different ways. Here are some highlights:

Cases Grouped by... - These basic reports list all assigned cases grouped by case type, owner, step, and other information. Each report has a summary based on the grouping that shows the number of cases in each group that meet your search criteria.

- Cases Grouped by Case Type
- Cases Grouped by Activity
- Cases Grouped by Step
- Cases Grouped by Status (Open/Closed) – groups cases by open or closed status
- Cases Grouped by Owner

Other Important Reports – These are additional basic reports that most agencies will need or find useful

- Step Duration Report – shows the progress of each case. For each case, the report shows when the case reached each step and how many days the case sat in each step
- Unassigned Cases
- Cases Assigned to Me

Non-Typical Reports – These reports have specialized features or uses

- Open Cases Number of Weekdays – Calculates duration of cases in terms of the number of week days instead of calendar days
- Number of Week Days between Two Steps – Calculates the number of days in weekdays between two selected steps
- Cases with Specific Step – Requires a case type, activity and step, and returns a list of all occurrences of the step for all cases in the selected activity
- Cases with Particular Step – Allows you to search by the name of the step for multiple activities and case types. Returns a list of all occurrences of the step for all cases

Reports Search Filters

Most reports can be filtered by the following search parameters:

- Case Type – Identifies the type of work performed
- Activity – Identifies the type of work performed at a more detailed level than Case Type
- Detail/Step – The step a case is currently in. Most cases flow through several steps before closing
- Status – Whether the case is open or closed
- Last Edit Date – When the case was last updated
- Case Created Date
- Owner – The owner of the case
- Performance Metrics – Ability to flag cases that do not meet performance standards
 - Open longer than a certain number of days
 - Not updated in more than a certain number of days but still open

IV. Report Formats

Reports can be downloaded in several different formats. The preview always shows the PDF format. The available formats include:

- PDF – Includes graphics and summary information. Non editable and printer friendly.
- MS Word – Similar to the PDF format, but in an editable format
- Excel – includes just the data without any graphics to make it easy to work with in Excel.
- CSV – this is a text format that may be useful if you need to plug your data into a different system or process

Report Example #1: Cases Grouped by Case Type

This report lists case information for all cases that meet the search criteria and provides a summary at the end of the report that is broken down by Case Type. Some examples of ways to filter the report include:

- Created in the past month
- Last edited in the past month
- Closed in the past month
- Assigned to one or more selected individuals
- Flag or highlight cases that took longer than 30 days to complete
- Flag cases that have not been worked on in more than a week

The screenshot shows a web form titled "Cases Grouped by Case Type" with a subtitle "This report lists all cases grouped by their case type (e.g., Retirement)." The form contains several sections for filtering:

- * Case Status:** A dropdown menu set to "All".
- Last Edit Date:** Two text input fields separated by "to".
- Create Date:** Two text input fields, the first containing "10/24/2012", separated by "to".
- Owner Name:** A section with checkboxes for "CONTRACTOR, KIMBERLY <kimberly+first@econsys.com>" and "KETTNER, KIMBERLY <kimberly+1@econsys.com>". Below these is a text input field with the placeholder "To add another case owner, enter name here...".
- Flag Cases:** A section with checkboxes for "Open longer than 70 days" and "Not updated in more than 30 days but still open".
- Download Report As:** A dropdown menu set to "PDF" and a checkbox for "Summary Only".

At the bottom, a note states "Required fields are marked with an asterisk *." Below this are three buttons: "Preview Report", "Download Report", and "Cancel".

Figure 1 - Search criteria for the Cases Grouped by Case Type Report

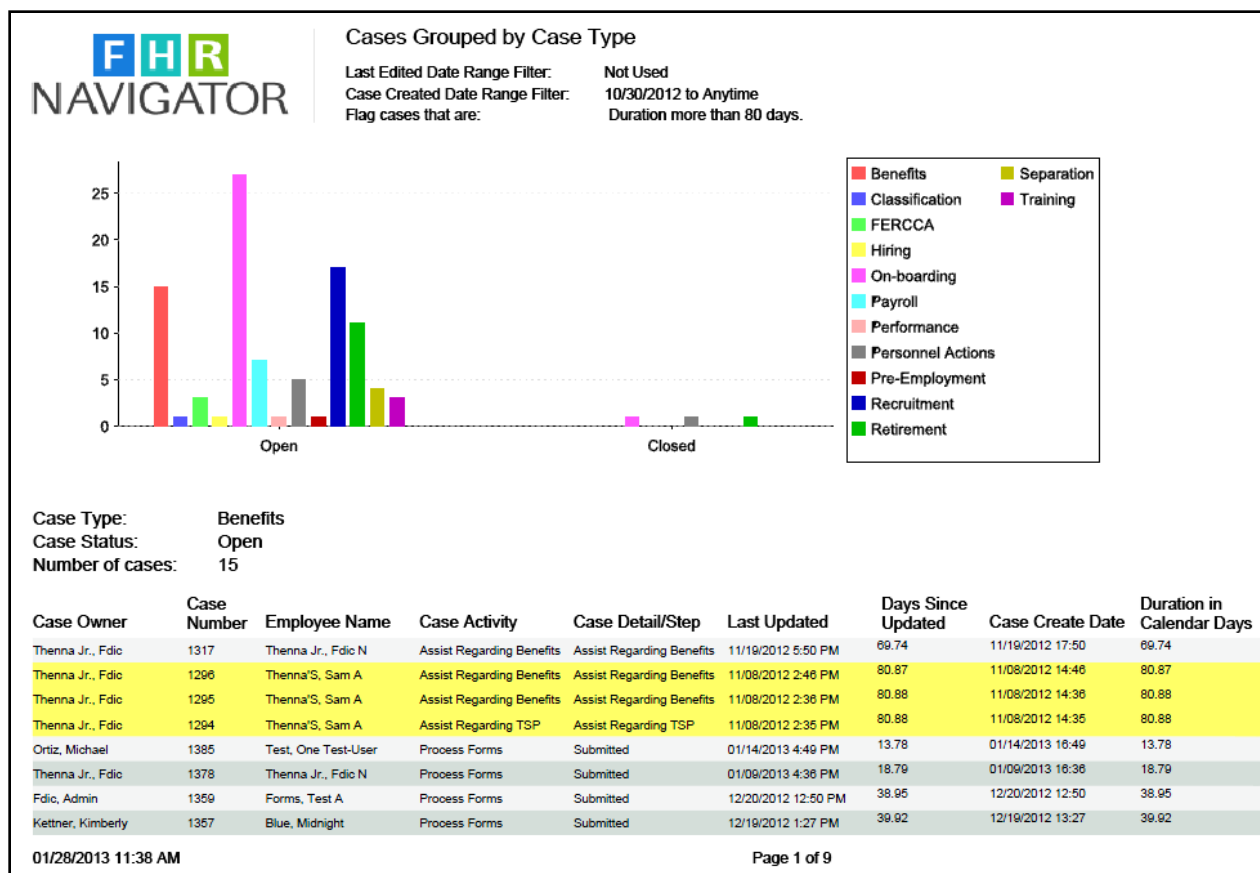


Figure 2 – Cases Grouped by Case Type report in PDF format.

The report includes a bar graph that shows the workload broken down by case type, followed by detailed information about each case, and a summary at the end that includes statistics broken down by case type. The detailed listing of the cases highlights cases that are flagged. Flagged cases do not meet performance criteria that are part of the parameters for the report.

If desired, you can run the report in summary-only mode which will produce the graph and the summary statistics. The summary statistics include the following information for each case type and open or closed status:

- Number of cases
- Average duration – number of days between when the case was created to today or when the case was closed
- Number of cases flagged – number of cases that do not meet performance criteria
- Percent of cases flagged – percent of cases that do not meet performance criteria
- Percent performance met – percent of cases that meet performance criteria

Cases Grouped by Case Type (#304) This report lists all cases grouped by their case type (e.g., Retirement).

* Case Status: All

Last Edit Date: to

Create Date: 10/30/2012 to

Owner Name:
Last name, First name

Flag Cases: ☒ Open longer than 80 days
Highlight cases that do not meet a selected performance metric ☐ Not updated in more than days but still open

Download Report As: PDF
☒ Summary Only

Required fields are marked with an asterisk *.

Preview Report **Download Report** **Cancel**

Figure 3 - The 'Summary Only' flag will result in summary statistics of the data without listing information about each case individually.

Cases-Grouped-by-Case-Type-(-304)-23.pdf - Adobe Reader

	Open					Closed					Total				
	Number of Cases	Average Duration	Number of Flagged Cases	% Cases Flagged	% Performance Met	Number of Cases	Average Duration	Number of Flagged Cases	% Cases Flagged	% Performance Met	Number of Cases	Average Duration	Number of Flagged Cases	% Cases Flagged	% Performance Met
Benefits	15	59.44	3	20.00%	80.00%	0	N/A	N/A	N/A	N/A	15	59.44	3	20.00%	80.00%
Classification	1	58.93	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	58.93	0	0.00%	100.00%
FERCCA	3	37.73	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	3	37.73	0	0.00%	100.00%
Hiring	1	62.07	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	62.07	0	0.00%	100.00%
On-boarding	27	45.17	3	11.11%	88.89%	1	8.88	0	0.00%	100.00%	28	43.87	3	10.71%	89.29%
Payroll	7	36.53	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	7	36.53	0	0.00%	100.00%
Performance	1	75.97	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	75.97	0	0.00%	100.00%
Personnel Actions	5	52.28	0	0.00%	100.00%	1	9.00	0	0.00%	100.00%	6	45.06	0	0.00%	100.00%
Pre-Employment	1	67.93	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	67.93	0	0.00%	100.00%

Figure 4 – Summary statistics broken down by cases type. For each case type, the summary shows the number of cases, average duration, number of cases flagged, and percent of cases that meet performance standards.

Report Example #2: Step Duration Report

This report shows what steps have been completed for each case that meets the search criteria. For each case, the amount of time spent in each step and when the case entered the step is displayed. Cases that have taken too long in a particular step can be highlighted, or cases that have taken too long to process overall. Some examples of ways to filter the report include:

- Show the progress of Recruitment cases
- Show the progress of Personnel Actions
- Created or edited in the past month
- Closed in the past month
- Assigned to one or more selected individuals
- Flag or highlight cases that took longer than 30 days to complete
- Flag cases that have not been worked on in more than a week

Step Duration Report Shows the progress of cases by listing how many days the case spent in each step.

* Case Status: All

* Case Type: Recruitment

* Activity: Recruitment Request

Last Edit Date: to

Create Date: 08/01/2012 to

Owner Name: To add case owner, enter name here...
Last name, First name

Download Report As: PDF

Required fields are marked with an asterisk *.

Preview Report

Download Report

Cancel

Figure 5 – Search criteria for the Step Duration Report

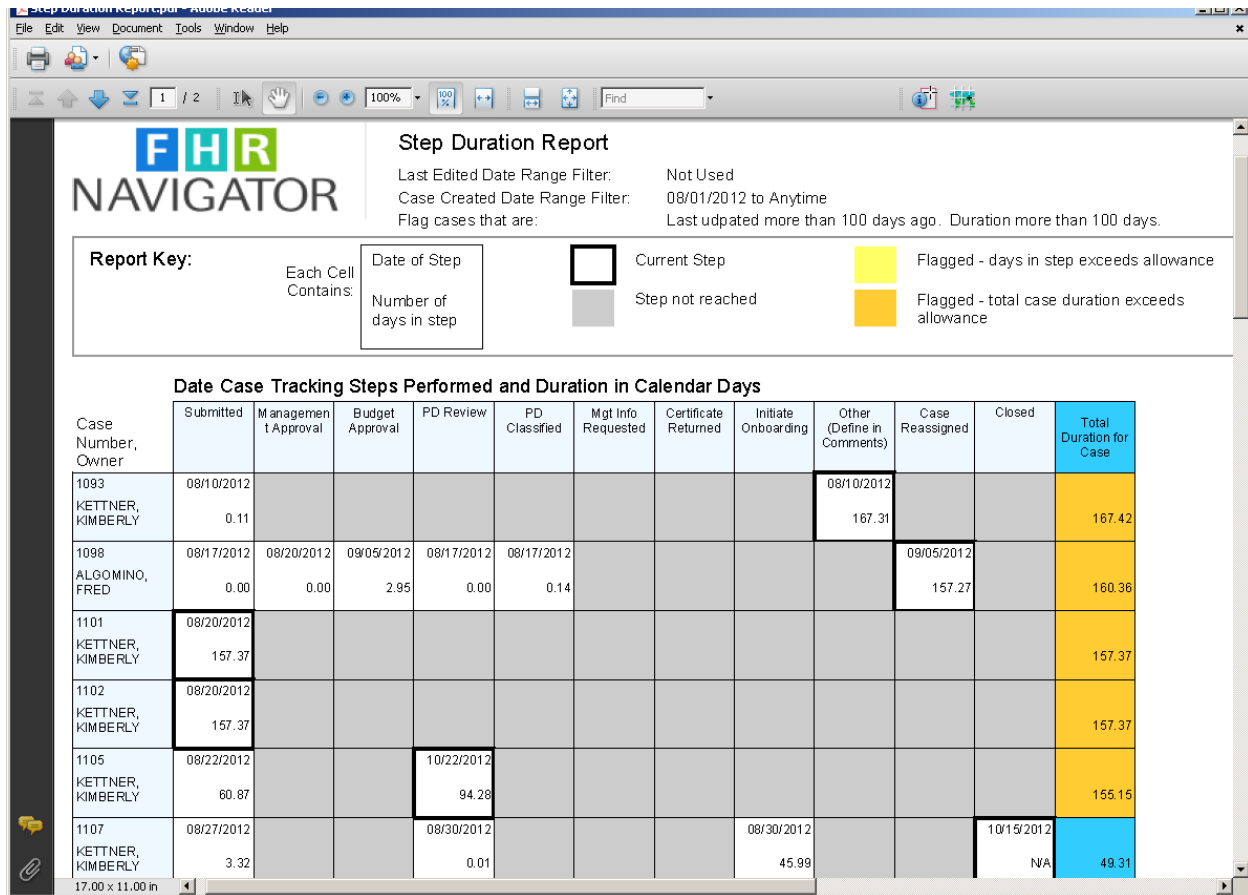


Figure 6 - Step Duration Report Example showing progress of Recruitment Requests created since August 1, 2012.