



# Understanding the Workload Report and the HR Action Count Report

To assist HR leadership in managing and monitoring the work of their staff, WiTS offers two reports: the **Workload Report** and the **HR Action Count Report**.

## The Workload Report

The **Workload Report** summarizes workload data by Action Type, Action Status, HR staff member, Branch, and/or IC organization. This report provides six different views – Overall, Workload, All HR Staff, specific HR Assistant, specific HR Specialist, or specific HR SPA.

Choose a Report List:		Select Your Report:	
CSD Report List		Workload Report	
Summarizes workload data by action type, action status, HR staff member, Branch and / or organization.			
Status of Actions:	All		
Generate Report By:	Date Action Received in HR		
Start Date:	2/15/2016		
End Date:	2/15/2016		
IC:	ALL		
Search Admin Code:	Exact	ALL	
Action Type:	ALL		
Include GRU Data?	Yes		
Branch:	ALL		
View:	Overall View		
HR Specialist:	ALL		
HR Assistant:	ALL		
HR SPA:	ALL		

## Report Parameters

- **Status of Action:** Select the status of the actions you would like retrieved. Select "All Actions" if you would like to see both active and completed actions.
- **Generate Report By:** Select if you would like to generate your report by "Date Action Received in HR", "Effective Date", or "Proposed Effective Date".
- **Start and End Dates:** Enter a date range (by Date Received in HR) to filter your report.
- **IC:** Indicate if you wish to filter the report by a specific Institute or Center (IC) or if you wish to view all ICs.
- **Search Admin Code:** Indicate whether you would like to view actions for a specific admin code, a root admin code, or 'All.' By choosing 'Exact' you can enter a specific admin code and the report will only return actions for that admin code. By choosing 'Begins With,' you can enter the root admin code for an organization. For example, if you enter HN32, the report will return all actions that have an admin code beginning with HN32 (HN3212, HN32A, etc.).
- **Action Type:** You can choose to display only a specific action type, or all action types.
- **Branch:** Indicate if you wish to filter actions by a specific Branch or if you wish to view actions for all Branches.

- **Include GRU Data?:** Indicate whether you would like to include GRU data.
- **Display By:** Indicate if you wish to filter the report by a particular Specialist, Assistant, or SPA (Final Authorizer).

After you have selected your report parameters, click the ‘Generate Report’ button to retrieve your report.

## Report Views

### Overall View

The Overall report display provides a count on the number of active/ completed actions by action type.

Process Name	Active	Completed	Total
<b>APPOINTMENT</b>	<b>456</b>	<b>213</b>	<b>669</b>
⊕ APPOINTMENT	139	10	149
<hr/>			
<b>AWARD</b>	<b>18</b>	<b>3</b>	<b>21</b>
⊕ ON-THE-SPOT	1	0	1
⊕ QSI	0	3	3
⊕ SPECIAL ACT OR SERVICE	3	0	3
⊕ TIME OFF AS AN INCENTIVE	14	0	14
<hr/>			
<b>CAREER CHANGE</b>	<b>87</b>	<b>27</b>	<b>114</b>
⊕ CHANGE TO LOWER GRADE	3	1	4
⊕ CONVERSION	2	3	5
⊕ CONVERSION NTE	5	7	12

The Action Type name displays an expand/collapse button. Expand any *Action Type* name to open another view with details on each action. The Status is system-generated based on the current state of the WiTS action at the time the report is generated.

Process Name	Active	Completed	Total
APPOINTMENT	456	213	669
<input type="checkbox"/> APPOINTMENT	139	10	149
<input type="checkbox"/> APPOINTMENT	139	10	149

  

Trans #	IC	Admin Code	Employee Name	Date Rec'd in HR / (Date Missing Docs Rec'd)	Status
574135	NCI	HNC42	[REDACTED]	(3/8/2013)	COMPLETED
574139	NIAID	HNM3G	[REDACTED]	(3/1/2013)	COMPLETED
574169	NIMH	HN76X2	[REDACTED]	(3/1/2013)	COMPLETED
581426	NIAID	HNM775	[REDACTED]	(3/8/2013)	COMPLETED
581529	NIAID	HNM5C2	[REDACTED]	(3/8/2013)	COMPLETED
587689	CC	HNJ654	[REDACTED]	(3/10/2013)	ACTIVE

## Workload View

The Workload view displays counts of both active and completed actions by “action type” for each individual HR staff member (I.e. each HRS, HRA and SPA).

Actions Worked During Date Range		Active	Completed	Total
HR ASSISTANTS		22	4	26
BEST, SEAN		3	4	7
APPOINTMENT		2	0	2
<input type="checkbox"/>	APPOINTMENT	2	0	2
CAREER CHANGE		1	0	1
<input type="checkbox"/>	PROMOTION	1	0	1
INITIATE JCPN		0	4	4
<input type="checkbox"/>	INITIATE JCPN	0	4	4

The Action Type name displays an expand/collapse button. Expand any *Action Type* name to open another view with details on each action. The Status is system-generated based on the current state of the WiTS action at the time the report is generated.

Actions Worked During Date Range		Active	Completed	Total
HR ASSISTANTS		22	4	26
BEST, SEAN		3	4	7
APPOINTMENT		2	0	2
<input type="checkbox"/>	APPOINTMENT	2	0	2
<input type="checkbox"/>	APPOINTMENT	2	0	2

  

Trans #	IC	Admin Code	Employee Name	Date Rec'd in HR / (Date Missing Docs Rec'd)	Status
593906	NIDDK	HNK6G	[REDACTED]	3/18/2013	ACTIVE
593924	NHLBI	HNH13B	[REDACTED]	(3/18/2013)	ACTIVE

This view only shows individual HRA/HRS/SPA staff members that have been designated on actions Received in HR within the report range dates specified on the parameter page.

### **HR Staff Member Views**

The HR Specialist, HR Assistant, and HR SPA report views display a count of the number of each active/completed action for the specifically selected individual CSD servicing Branch staff member (i.e., an HR Specialist, an HR Assistant, or an HR SPA).

# The HR Action Count Report

The **HR Action Count Report** provides a summary count of the number of each type of action by its current status based on the Date Received in HR.

Choose a Report List:		Select Your Report:	
CSD Report List	▼	HR Action Count	▼
Provides summary information on the HR Action activity throughout the CSD ?			
Start Date:	8/27/2014	?	
End Date:	8/27/2014	?	
Branch:	ALL	?	
Include GRU Data?	Yes	?	

## Report Parameters

- **Start and End Dates:** Enter a date range (by Date Received in HR) to filter your report.
- **Branch:** Indicate if you wish to filter actions by a specific Branch or if you wish to view actions for all Branches.
- **Include GRU Data?:** Indicate whether you would like to include GRU data.

After you have selected your report parameters, click the 'Generate Report' button to retrieve your report.

## Report View

ACTIVE												
	A	B	C	D	E	F	G	GRU	H	I	J	Total
APPOINTMENT	6	15	9	9	36	8	22	19	3	6	6	139
AWARD	2				1	2				10	3	18
CAREER CHANGE	8	4	9	16	1	7	10		15	11	6	87
CHANGE IN WORK SCHEDULE/HOURS					6	1						7
CLASSIFICATION		1				1			2		1	5
INITIATE JCPN	1		2	8	1		1	3		3	1	20
LEAVE WITHOUT PAY (LWOP)					1							1
RECRUITMENT	12	14	18	21	21	12	18		5	12	7	140
RETURN TO DUTY					1			1			1	3
SENIOR LEVEL PAY	4	2		1		1						8
SEPARATION	1		3	5	1	7	3		3	2		25
SPECIAL PAY	1					3	3	1		2	1	11
<b>Total</b>	<b>35</b>	<b>36</b>	<b>41</b>	<b>60</b>	<b>69</b>	<b>42</b>	<b>57</b>	<b>24</b>	<b>28</b>	<b>46</b>	<b>26</b>	<b>464</b>

## Exporting and Printing

This report can be printed or exported to Excel, PDF, or Word by clicking on the icon on the toolbar:

