Understanding the Orientation Report

The Orientation Report provides new employee orientation information and information on employees moving into new a position. You can use this report to update members of the organization(s) you service with information on employees who will be coming on-board during a particular time.

The parameter page is where you will choose your report filters.

Orientation Report Parameters

- **Generate Report by:** Select a date field to filter the report.
  - Orientation Date: This filter will return records for those individuals who are scheduled to attend the New Employee Orientation.
  - EOD Date: This filter will return records for those individuals who are entering a new appointment.
  - Effective Date: This filter will return records for those individuals who entered a new position, which includes new appointments and career change actions (i.e., career ladder promotions, details, extensions, conversions, changes to lower grade, and transfers). Note: This filter will typically only return historical information because the Effective Date is set when the personnel action is processed.
  - Proposed Effective Date: This date filter will return records for those individuals entering a new position, which includes new appointments and career change actions (i.e., career ladder promotions, details, extensions, conversions, changes to lower grade, and transfers).

- **Start and End Dates:** Enter a date range to filter the report.

- **Action Type:** Indicate if you wish to filter the report by a particular action type (Appointment or Career Change) or if you wish to view all action types. Career Change actions are only available when the report is generated using the Effective Date or Proposed Effective Date filters.
• **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 ‘By Exact Match’ 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.).

• **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.

**Orientation Report**

The report lists essential information: WiTS #, Action Type/Sub Action Type, IC, Admin Code, Employee Name, Position Information, Duty Station, Hire Type (used for Orientation purposes), CSD Orientation Contact, Attendance status for Orientation, and Benefits Eligibility. Depending on your selection in the “Generate Report By” filter, the date fields Entry on Duty (EOD) Date, Orientation Date, Effective Date, or Proposed Effective Date will be displayed on your report.

**Exporting and Printing**

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