

Creating a Case Status Report

1) Click New > Report > select the FN + Process data type.



2) Configure the General Information settings as desired > click Update Info.

General Information Report Columns Report Criteria
Report Name
Report Name: Robert's Active Cases
Report Description:
Created By:Reaume, Robert
Sharing
Sharing:● Shared ○ Private Report Type:FN + Process
Report Folder: 2 - Case Status
HR View: None OAll OSelected Select Company (20 Max) Select Group (10 Max)
External Firm View: None OAII OSelected Select External Firm (20 Max)
Report Generation Mode
Automatic Update: Nightly Test Mode: Yes No (100 Max)
Report Style
Style Sheet: Original Style Contemporary - Blue Freeze Header Row: Yes No Include Record Count: Yes No

- Report Name: Provide a descriptive name that will inform others of the purpose of the report.
- Sharing: If desired, select Shared so non-Admin users can view and duplicate your template as needed.
- **Report Folder**: Consider placing your report template in a custom folder for better organization.
- Automatic Update: If this report will be viewed regularly consider choosing a weekly or nightly routine.
 - Contact Customer Support to enable the "Nightly" option if not present.
- Style Sheet: Choose one of the Contemporary options for a more modern styling for viewing in-system.
- Freeze Header Row: Set to Yes to ensure column headers remain visible when scrolling through results.
- Include Record Count: Set to Yes to have a case total included at the bottom of the report.

3) Add the desired fields to your report from the **Report Columns** tab. Refer to the provided field list for useful fields commonly included in a Case Status report.

General Information Report Columns Report Criteria	
General Columns	
Available Columns	Selected Columns
FN A Number Additional Nationality Additional Phone Numbers Address-Current Apt Address-Current Country Address-Current Country Address-Current Country Address-Current In Care Of Address Current Line 1	Add Columns → ← Remove Columns ← Remove Columns Case No Beneficiary Name Petitioner Process Type Process Reference Summary Case Disposition Special Instruction Flag Last Process Activity Case Opened Application Filed Receipts BFF Due Date
Activities	RFE Response Submitted Final Action Date
View: All View: All Process Available Columns Date Opened 1st Additional Recruitment Step Placed 1st Sunday Ad Placed 2nd Additional Recruitment Step Placed 2nd Sunday Ad Placed FN Eligible for DACA 3rd Additional Recruitment Step Placed Initial Eligibility for DACA Determined FN Not Eligible for DACA 45 Dava Letter Due	 Final Action Status Next Unfinished Reminder - Expiry Next Unfinished Reminder - Subject Current Status Current Status Expires EAD Expiration I-797 Expires I94 Expires Partner Responsible Attorney Case Manager

Case Status Report Fields						
Case No	Beneficiary Name	Petitioner	Process Type			
	Summary Case					
Process Reference	Disposition	Special Instruction Flag	Case Opened			
Application Filed	Receipts	RFE Due Date	RFE Response Submitted			
Next Unfinished Next Unfinished						
Final Action Date	Final Action Status	Reminder - Expiry	Reminder - Subject			
Current Status	Current Status Expires	EAD Expiration	I-797 Expires			
194 Expires	Partner	Responsible Attorney	Case Manager			

4) From the **Report Criteria** tab configure the desired filters > click **Update Info**.

General Information Report Columns Report	: Criteria
Search in [7]	
 Division:	All
Assignment:	Reaume Robert v 's Cases
Partner:	All V AND
Responsible Attorney:	All V AND
Collaborating Attorney:	All v AND
Case Manager:	All v AND
Paralegal:	All 🗸
Case Status:	Active
Case Filter:	
Process:	

Assignment: Select a user's name to limit the report to only cases they are assigned to. **Case Status**: Select **Active** to limit the report to only active (open) cases. 5) When ready, click **Run Report**. Once the report has been placed into the queue you may either remain on the page and wait for the results, or you may leave the page and return later.

Reports / Robert's Active Cases (FN + Process) /				
Report not Queued.				
Back to Template List Update Info Duplicate Template Run Report Cancel				
General Information Report Columns Report Criteria				

📠 Reports / Robert's Activ	ve Cases (FN + Proc	ess) / Select Report Type: Interactive Reports
Status:		
Your report is #1 in the q	ueue. While your	report is processing, duplication and re-running of the report template is unavailable. Please use the Stop button if you need to edit or duplicate this report template.
Back to Template List	Stop Report	

6) Once complete you may view the results **On Screen** or **In Excel**.

Reports / Robert's Active Cases (FN + Process) /
Status: Ready! Generated on 06/27/2024 @ 09:21:09 Mountain
View Report: [<u>On Screen</u>] - [<u>In Excel</u>] Note - to download a file instead of viewing it within the browser: PC users, Right Click the desired link and select Save Target As Mac users, Right Click or Control Click the desired link and select Download Linked File.
Back to Template List Update Info Duplicate Template Run Report Cancel

Creating a Client Expiration Report

1) Click **New** > **Report** > select the **FN** + **Process** data type.



2) Configure the General Information settings as desired > click Update Info.

General Information Report Columns Report Criteria
Report Name
Report Name: Client Expirations - Next 180 Days Report Description: Created By: Reaume, Robert
Sharing
Sharing: Shared O Private Report Type: FN + Process Report Folder: 4 - Expirations HR View: None OAll OSelected Select Company (20 Max) Select Group (10 Max) External Firm View: None OAll OSelected Select External Firm (20 Max)
Report Generation Mode
Automatic Update: Sunday Test Mode: Yes No (100 Max)
Report Style
Style Sheet: Original Style ©Contemporary - Blue OContemporary - Beige Freeze Header Row: OYes ONo Include Record Count: OYes ONo

- Report Name: Provide a descriptive name that will inform others of the purpose of the report.
- Sharing: If desired, select Shared so non-Admin users can view and duplicate your template as needed.
- **Report Folder**: Consider placing your report template in a custom folder for better organization.
- Automatic Update: If this report will be viewed regularly consider choosing a weekly or nightly routine.
 - Contact Customer Support to enable the "Nightly" option if not present.
- **Style Sheet**: Choose one of the **Contemporary** options for a more modern styling for viewing in-system.
- Freeze Header Row: Set to Yes to ensure column headers remain visible when scrolling through results.
- Include Record Count: Set to Yes to have a case total included at the bottom of the report.

3) Add the desired fields to your report from the **Report Columns** tab. Refer to the provided field list for useful fields commonly included in a Client Expiration report.

General Information Report Columns Report Criteria		
General Columns		
Available Columns		Selected Columns
FN A Number Additional Nationality Additional Phone Numbers Address-Current Address-Current Apt Address-Current Country Address-Current Country Address-Current In Care Of Address-Current Line 1	Add Columns → ← Remove Columns	Case No Beneficiary Name Petitioner Process Type Case Opened Application Filed Final Action Date Final Action Date Final Action Status Case Closed Current Status Current Status Expires EAD Expiration
Activities		I-797 Expires I94 Expires ↓
View: All	Add Columns → ← Remove Columns	Visa Expires Date AP Expiration Re-Entry Permit Expiration I-129S Expires I-551 Permanent Resident Card Expires DS-2019 Expires Passport 1 Expiration Responsible Attorney Case Manager

Client Expiration Report Fields				
Case No	Beneficiary Name	Petitioner	Process Type	
Case Opened	Application Filed	Final Action Date	Final Action Status	
Case Closed	Current Status	Current Status Expires	EAD Expiration	
I-797 Expires	I94 Expires	Visa Expires Date	AP Expiration	
Re-Entry Permit I-551 Permanent				
Expiration	I-129S Expires	Resident Card Expires	DS-2019 Expires	
Passport 1 Expiration	Responsible Attorney	Case Manager		

4) From the **Report Criteria** tab configure the desired filters > click **Update Info**.

	Division:	All	~	_
	Assignment:	All 🗸	's Cases	
	Partner:	All 🗸	AND	
Respons	sible Attorney:	All 🗸	AND	
Collabora	ting Attorney:	All 🗸	AND	
C	Case Manager:	All 🗸	AND	
	Paralegal:	All 🗸		
	Case Status:	All	~	
	Case Filter:			
	Dracase			
	Process:			
		Adjustment of Status (Family)	

Assignment: Select a user's name to limit the report to only clients they are assigned to. **Case Status**: Select **All** to include clients with open and/or closed cases.

Expiration Date Range:	Current Status Expires	✓ OR			
	EAD Expiration	✓ OR			
	I-797 Expires	✓ OR			
	194 Expires	✓ OR			
	Visa To Date	V OR			
	AP Expiration	✓ OR			
	Re-Entry Permit Expiration	✓ OR			
	I-129S Expires	✓ OR			
	I-551 Permanent Resident Card Expires	V OR			
	DS-2019 Expires	v V I			
	From: 06/27/2024 🔛 To: 12/24/202	4 🔛 Calc Next 180 Days ?			
Additional Poport Filtors					
Additional Report Filters.	None		AND		
	None	✓ equals ✓	AND		
	None	✓ equals ✓	AND		
	None	✓ equals	AND		
	None	✓ equals			
Multiple FN Rows:	OStandard View (Include All Rov	NS)	2		
	OSingle FN View (Print FN Inform	nation on 1st row only. Selecting this option will change Group B	y "Beneficiary Name")		
Single Process View(Only print Current/Last Opened process)					
Record Count:? Calculate Display Records in FN Module					

Expiration Date Range: Select the desired status documents that you'd like to include in the filter for upcoming expirations. Once you've selected from the three available dropdowns click **Update Info** to make three additional dropdowns available and repeat as needed.

Multiple FN Rows: Select Single Process View to only display each FN once on the report results. If Process-level fields are included in the report the data from the "Current" process (or last opened if no process marked "Current") will be returned.

5) When ready, click **Run Report**. Once the report has been placed into the queue you may either remain on the page and wait for the results, or you may leave the page and return later.

Reports / Client Expirations - Next 180 Days (FN + Process) /					
Report not Queued.					
Back to Template List	Update Info Duplicate Template Run Report Cancel				

📾 Reports / Client Expirations - Next 180 Days (FN + Process) /	Select Report Type: Interactive Reports			
Status:				
Your report is #1 in the queue. While your report is processing, duplication and re-running of the report template is unavailable. Please use the Stop button if you need to edit or duplicate this report template.				
Back to Template List Stop Report				

6) Once complete you may view the results **On Screen** or **In Excel**.

Reports / Client Expirations - Next 180 Days (FN + Process) /								
Status: Ready! Generated on 06/27/2024 @ 19:18:14 Mountain								
View Report: [<u>On Screen</u>] - [<u>In Excel</u>] Note - to download a file instead of viewing it within the browser: PC users, Right Click the desired link and select Save Target As Mac users, Right Click or Control Click the desired link and select Download Linked File.								
Back to Template List	Update Info	Duplicate Template	Run Report	Cancel				