

**Business Intelligence Grievance History Report via Portal**

- Purpose** Report on the entire history of a Grievance including all steps. All detail is shown on all steps for each grievance. The report will break by grievance number. This report is somewhat similar to the Grievance Detail Agency Report. Use this report to determine how long it takes to resolve grievances, whether there were missed timeframes, or which step has taken the longest.
- Trigger** Unique requests for data on grievance activity, the need to audit data entries.
- Prerequisites** You have grievance data entered into HCM and within six months of receiving system access you have successfully participated in Grievance Tracking training.
- End User Roles** In order to perform this transaction you must be assigned the following role with reporting access:  
Decentralized Grievance Administrator  
Decentralized Grievance Inquirer

Change History	
Date	Change Description
July 25, 2012	Created.
February 5, 2013	Updated link in the Menu Path

**Menu Path** <https://wahrms.wa.gov/irj/> → BI Reports → Grievance Reporting → Grievance History Report

**Transaction Code** NA

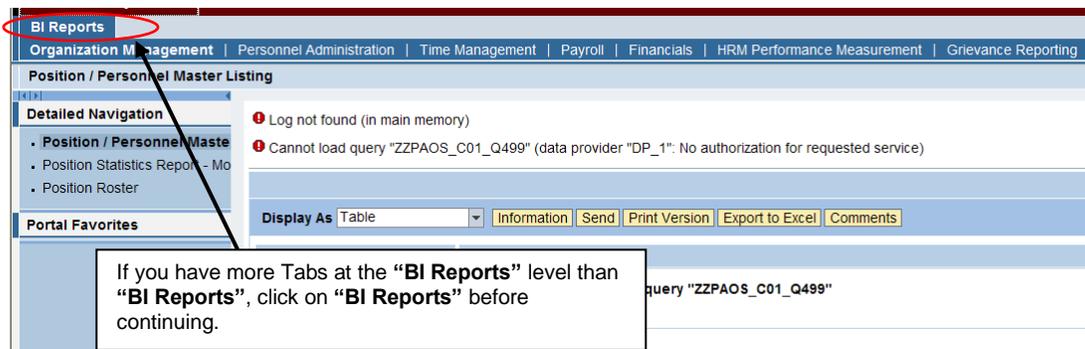
**Helpful Hints** Further instructions on BI Report features are available under BI Training materials, including the “BW/BI Grievance InfoCube” Self-Paced Learning Materials.

**Procedure**

1. Go to the Portal using your normal Production link: <https://wahrms.wa.gov/irj/portal> . Sign onto “BI Reports” by entering your “User ID” (your complete state agency e-mail address) and your “Password” (your state agency network password). Press the “Enter” key or click on the “Log On” button.



2. The screen you see next will vary depending on your security access. You should see a Tab that says, “BI Reports” with other Tabs under it. If you have more Tabs at the “BI Reports” level, make sure that you have the “BI Reports” Tab selected.



3. Under “BI Reports”, click on “Grievance Reporting”. Your screen should look similar to the one below. It will default to the top report selection in the “Detailed Navigation” window on the left. In this case, it is “Grievance History Report”.

## Title: Business Intelligence Grievance History Report via Portal

Click on “Grievance Reporting” to find the Grievance Reports Section.

Once you are in “Grievance Reporting” click on the desired Grievance Report in the “Detailed Navigation” Section.

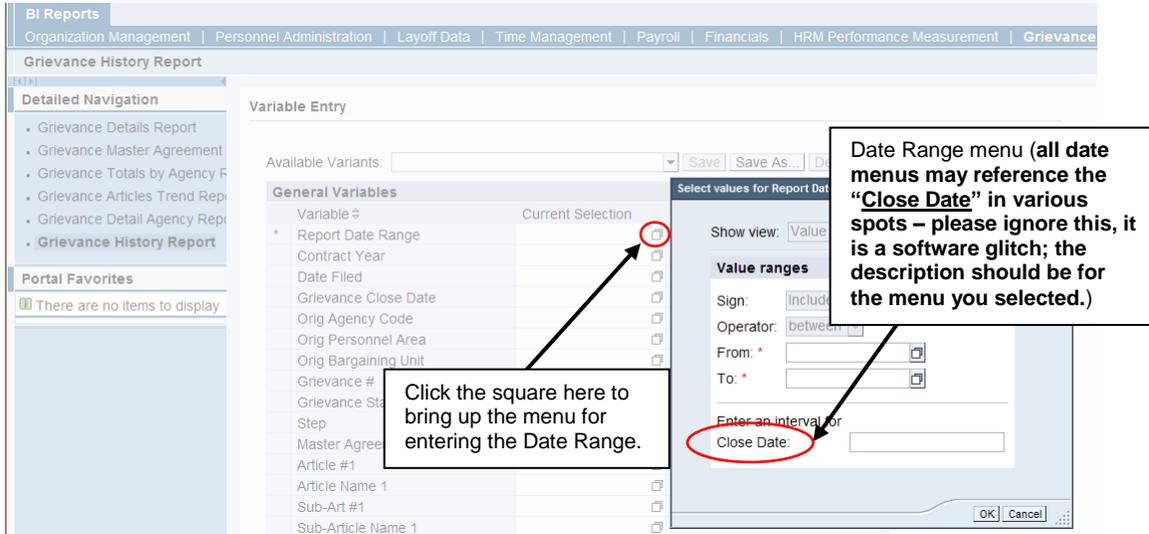
Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		

- To run “Grievance History Report”, click on it, if it isn’t already in bold. You will see the selection screen below.

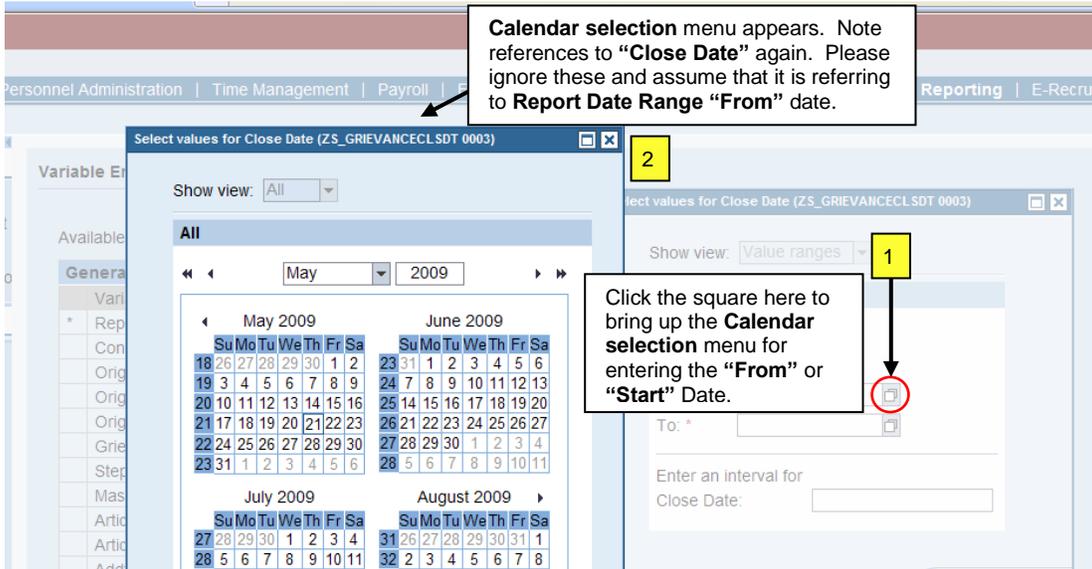
Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Date Filed		
Grievance Close Date		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance #		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Sub-Art #1		
Sub-Article Name 1		
Addtl Discipline Reason 1		

- Of the fields that appear on the Selection Screen, only the “Report Date Range” field requires an entry. Enter a valid date range to restrict the report results to a specific time period. To do this, click on the small square on the right side of the “Current Selection” box for “Report Date Range”. A popup menu will appear allowing the entry of a date range (see below).

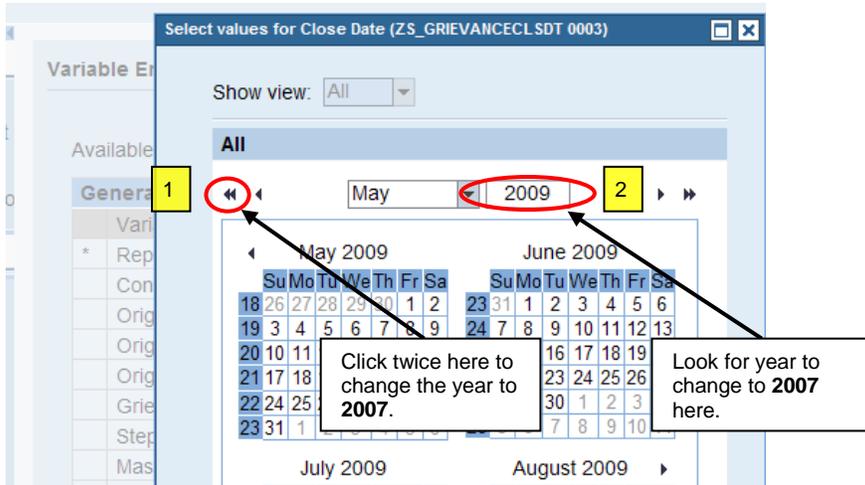
Title: Business Intelligence Grievance History Report via Portal



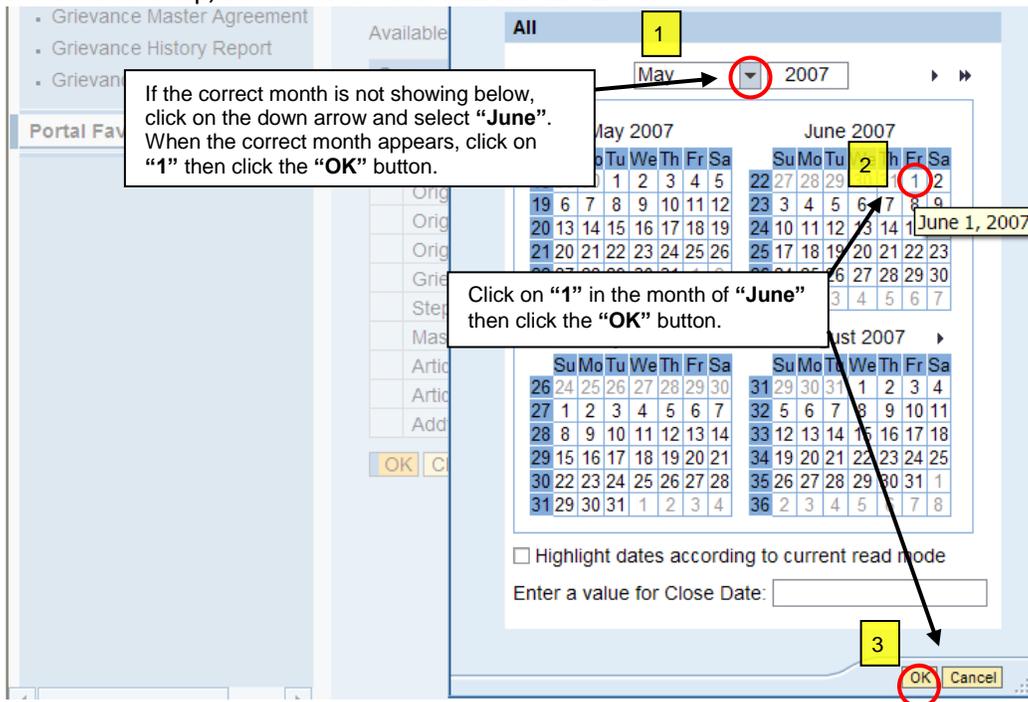
- Click on the square on the right side of the "From" box to get to the "Calendar" menu (see below).



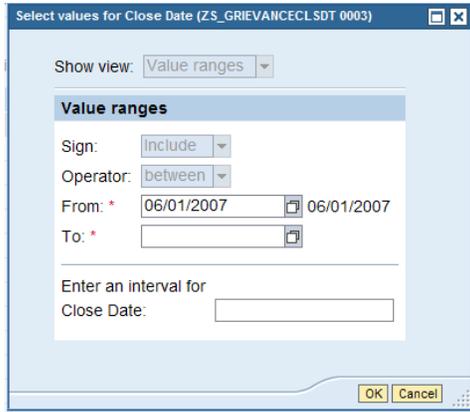
- In this example, we are going to use the "Report Date Range" of June 1, 2007 to June 15, 2007. To enter the "From" date of June 1, 2007, click twice (waiting for the screen to refresh after each click) on the double left arrow to change the year to 2007 (see below).



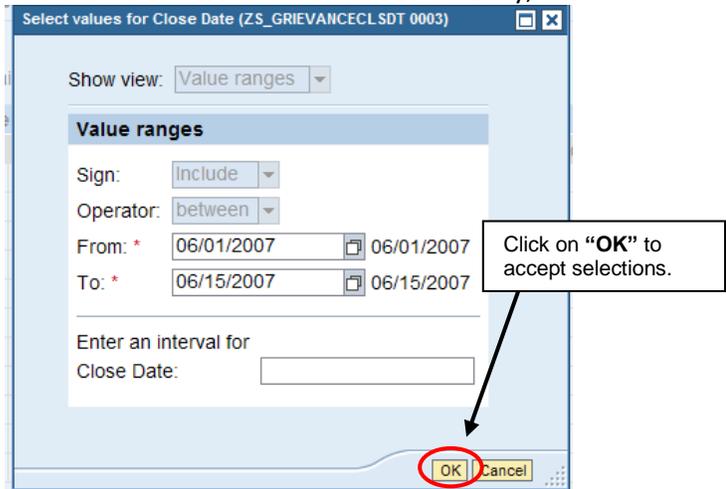
8. Since the month of June is already showing as one of the four months on the menu, you can just click on “June 1st” then click the “OK” button. Otherwise you could click the down arrow for month at the top, select “June” and click on the “1st”.



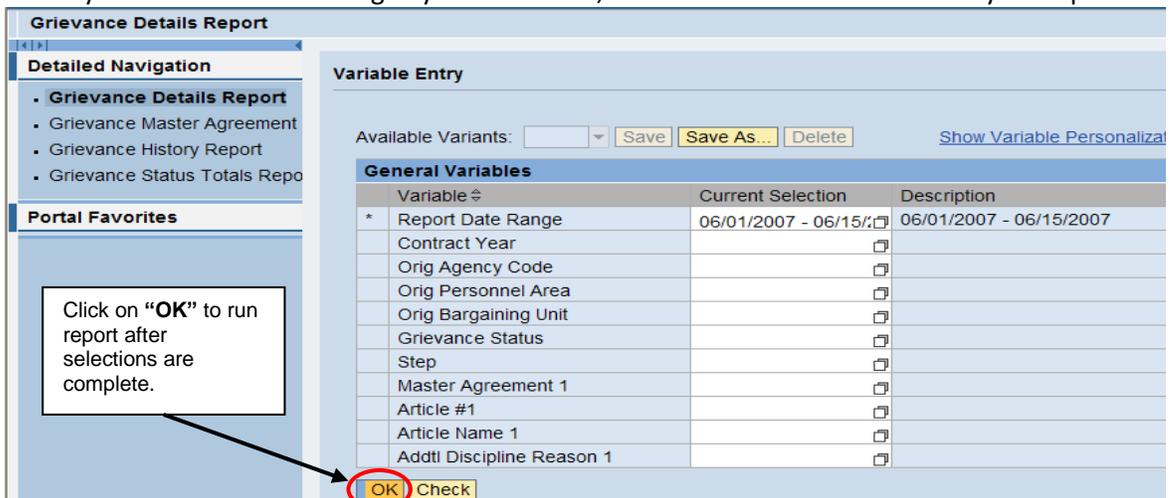
9. You should see the “From” box filled in with 06/01/2007 (your settings may be formatted for DD/MM/YYYY, so you may see 01/06/2007).



- You have the option of repeating the same instructions for the "To" date (June 15, 2007), or you can type the date in directly following the same format as the "From" date. You should see the screen below. When it is filled out correctly, click the "OK" button.



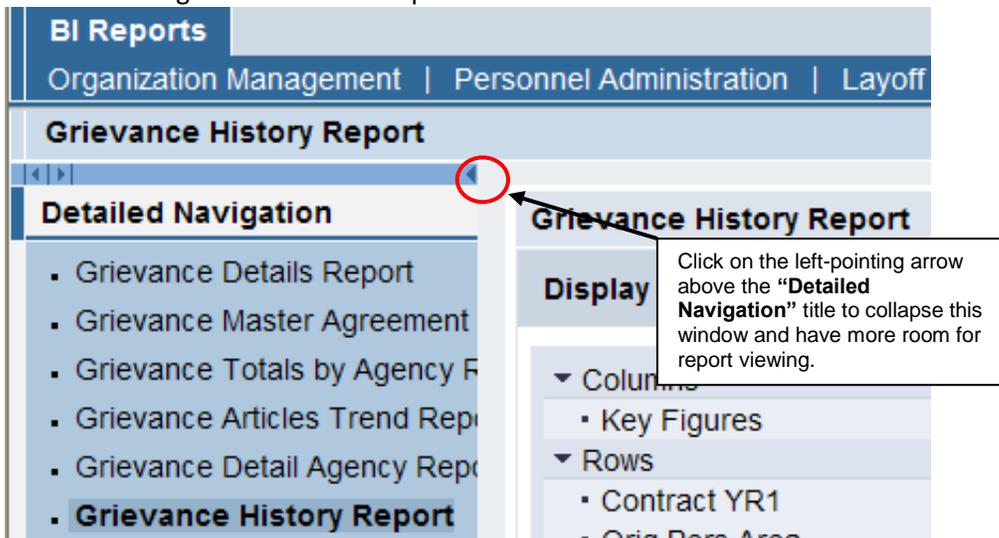
- The screen will return to the original selection screen with the "Report Date Range" filled in. At this point, you may make additional selections using the other fields on the selection screen to further narrow the selected data returned. Once the report is run, you will also be able to apply "filters" on these fields and others to refine the data even more.
- When you are finished selecting any other criteria, click on the "OK" button to see your report.



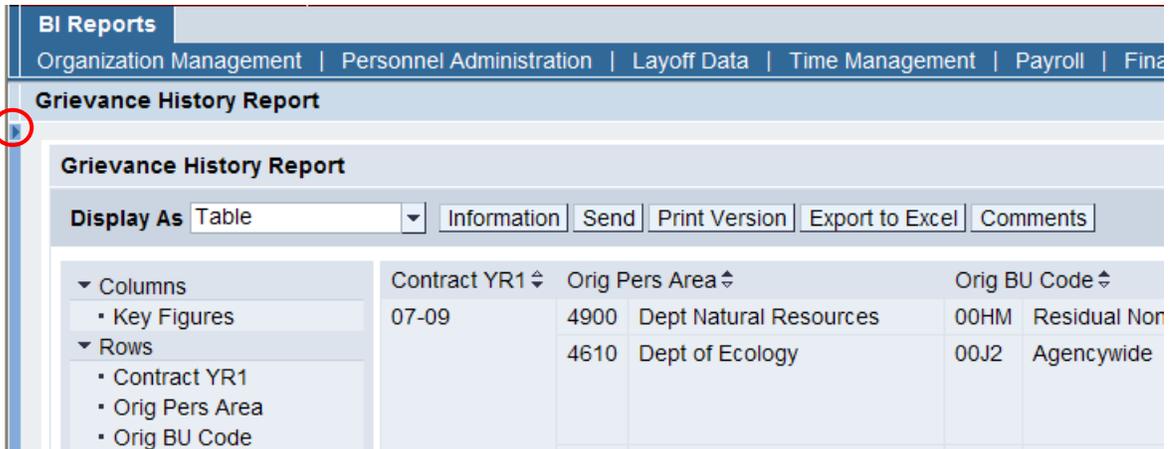
13. The “Grievance History Report” should appear on your screen, similar in appearance to the screen below. Because you are seeing one line of detail for each grievance record, this type of report is called a “detail” type report. Before you can use the report, however, you **must** add the “Closed Date” filter.

Contract YR1	Orig Pers Area	Orig BU Code	Grievance #	Valid to	Valid from	Step
07-09	4900 Dept Natural Resources	00HM Residual NonSup	WFSE 07-0328	06/26/2007	03/28/2007	1M
	4610 Dept of Ecology	00J2 Agencywide	ECY-052907-DB	06/01/2007	05/29/2007	2M
				07/03/2007	06/14/2007	2R
	4770 Dept of Fish & Wildlife	00PE Biology BU1	07-GG-102	12/31/9999	01/01/2007	1M
	4050 Dept of Transportation	00SR Engnrng Techs	4/07	12/31/9999	04/25/2007	3M
	3000 DSHS Headquarters	00JE Econ/SocialSvcs	101207DCSFIFE	05/06/2008	04/08/2007	PARMR
	3025 DSHS Region 5	00JE Econ/SocialSvcs	1232007	12/31/9999	03/30/2007	2R
05-07	3113 Airway Heights Corr Ctr	00TA Institutions	01-07 AHCC	12/31/9999	04/30/2007	PARMR
			02-07 AHCC	12/31/9999	05/01/2007	PARMR
			03-07 AHCC	12/31/9999	01/23/2007	1M
			04-07 AHCC	12/31/9999	01/17/2007	1M
			11-07 AHCC	07/16/2007	06/04/2007	PARMM
			13-07 AHCC	12/31/9999	02/10/2007	1M
			14-07 AHCC	12/31/9999	03/05/2007	1R
			27-07 AHCC	12/31/9999	05/30/2007	PR
			43-07 AHCC	12/31/9999	04/24/2007	1M
			44-07 AHCC	06/15/2007	05/12/2007	1R
			45-07 AHCC	06/20/2007	05/02/2007	1R

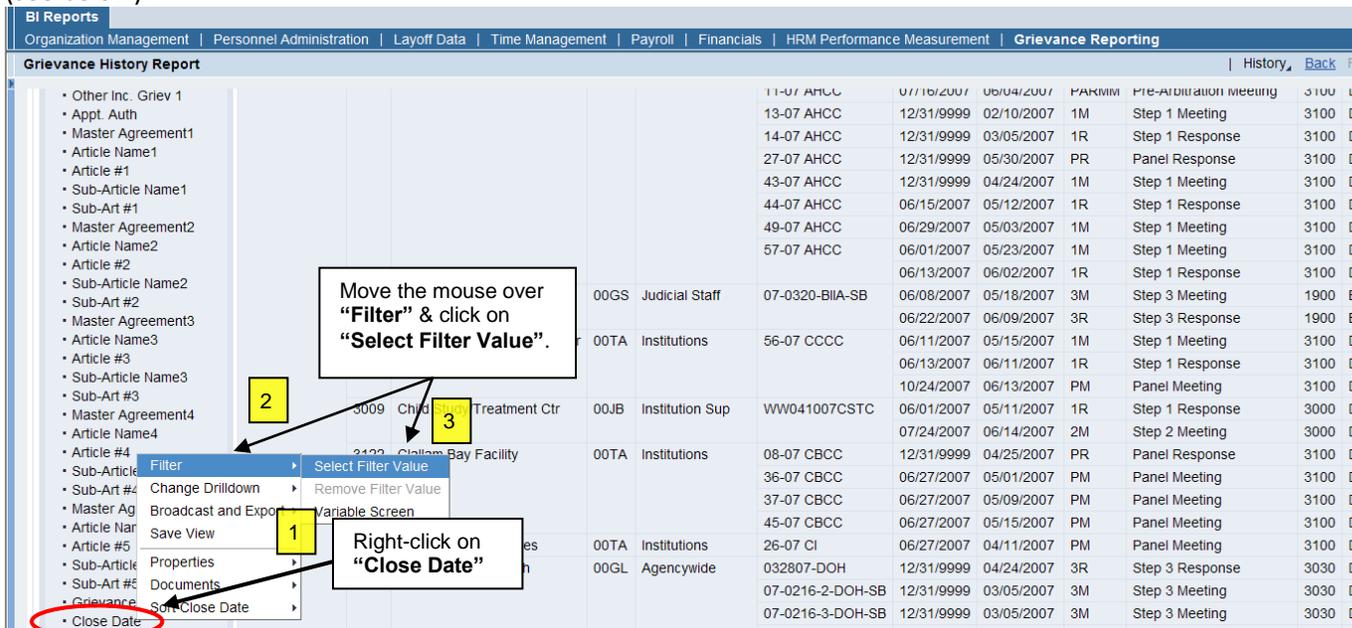
14. You can get more room for report viewing by clicking on the left-pointing arrow just above the “Detailed Navigation” title to collapse the window.



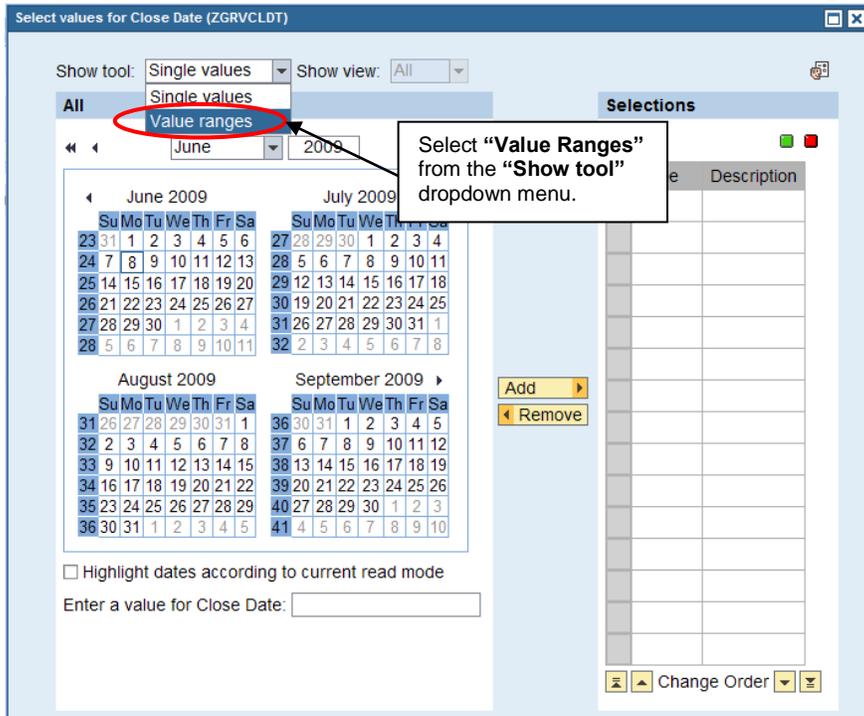
15. Your screen should now appear without the “Detailed Navigation” window. You may bring back the “Detailed Navigation” window at any time by clicking on the right-pointing arrow on the left edge of the screen, between the two “Grievance History Report” titles (see red circle below).



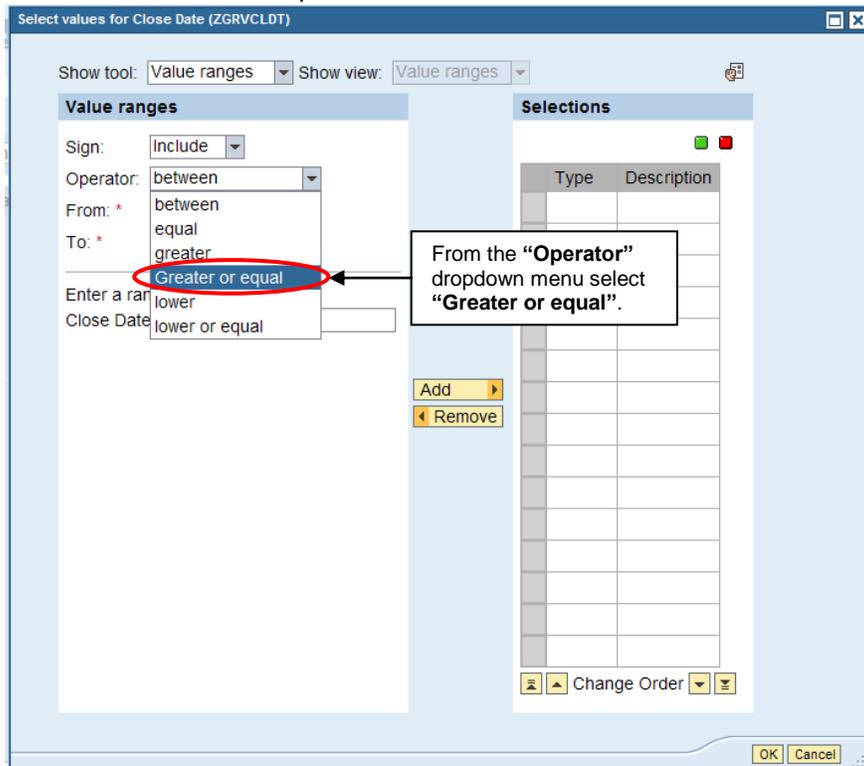
- Right-click on "Closed Date" in the "Rows" area on the left side of the screen. In the popup menu, move the mouse pointer over "Filter" and click on "Select Filter Value" from the sub menu (see below).



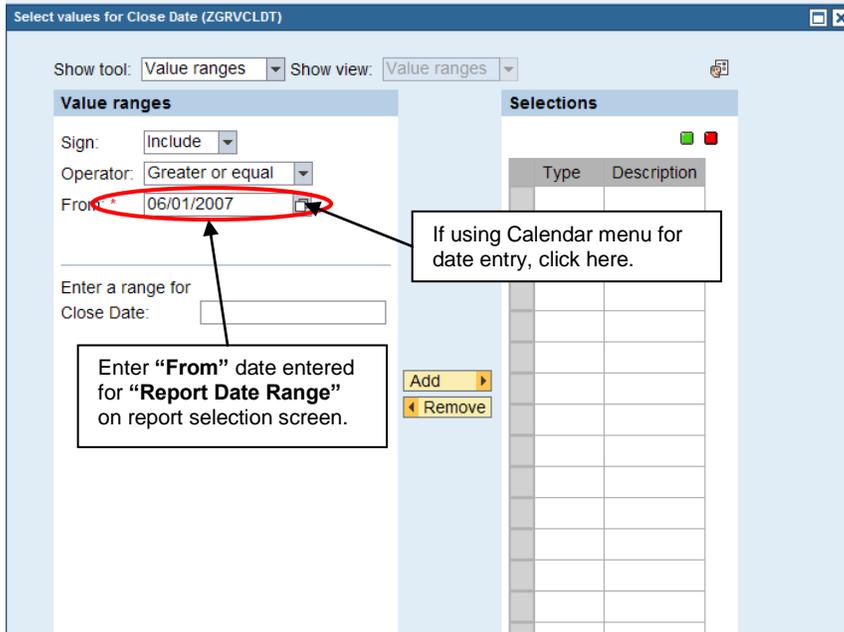
- The "Closed Date" Filter menu should appear on the screen. This is the beginning of the "Close Date" filter process. You will have to apply two "Close Date" filters every time you run a Grievance report in BI to get accurate results.
- Click on the "Show tool" dropdown menu and select "Value Ranges" (see below)



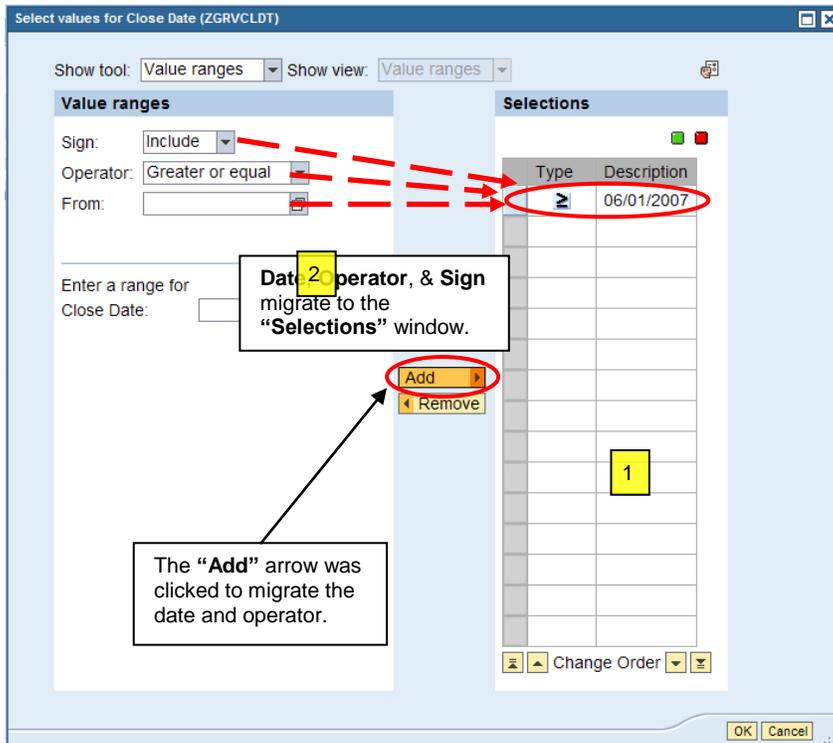
19. The screen should change to the one seen below. Click on the dropdown menu for "Operator" and select "Greater or equal".



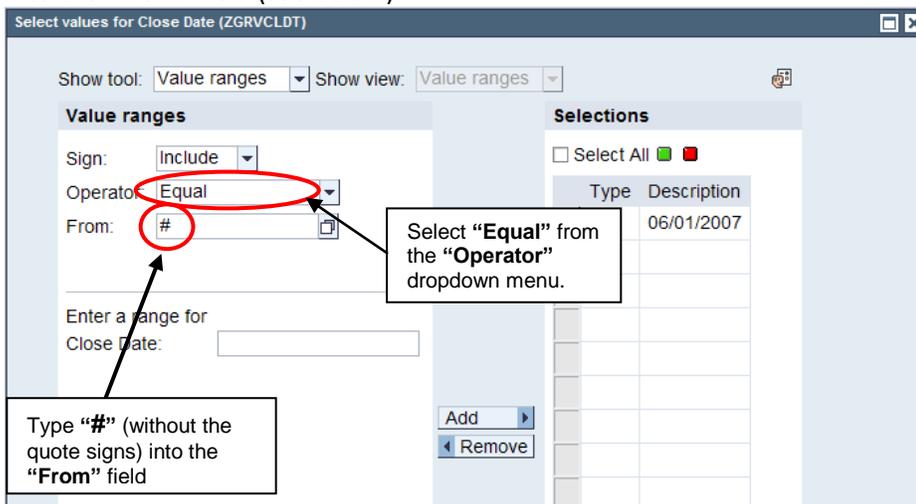
20. In the “From” field, type the date you used in the “Report Date Range” “From” field (i.e. the “Start” date of your selection range (see item 9 of these instructions)). The date may also be entered by clicking on the square at the right end of the field and selecting from the calendar menu (see item 6 of these instructions). For the example shown in these instructions, the “From” date is June 1, 2007.



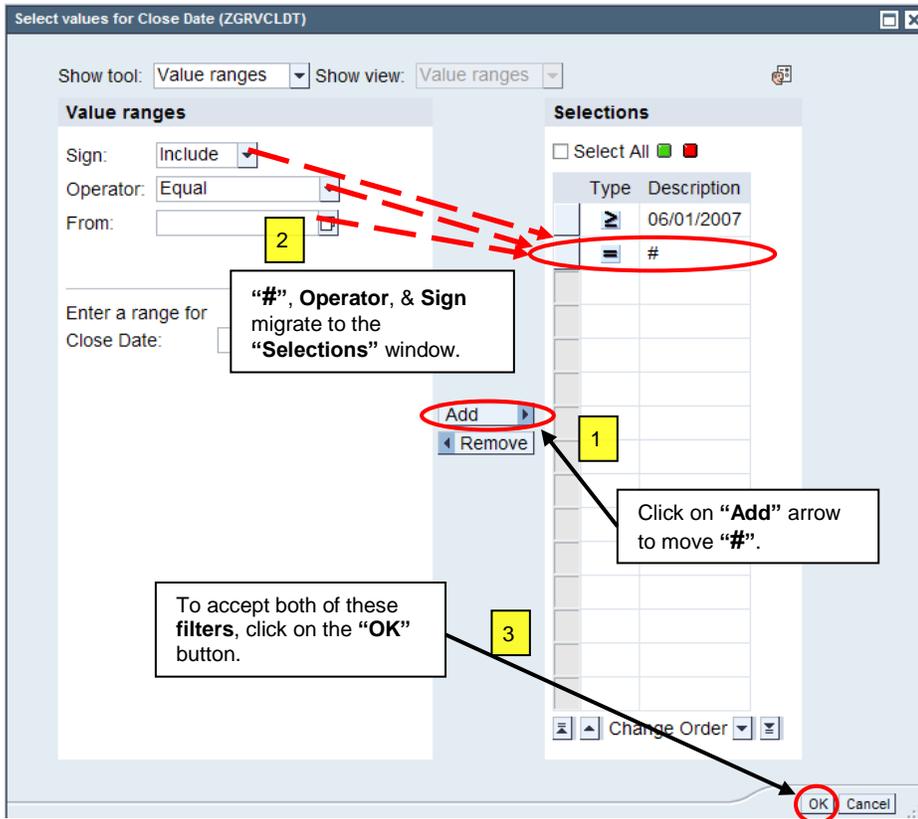
21. Now that you have selected the “Operator” and the “From” date, the filter needs to be migrated to the “Selections” window on the right side. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the date will appear in the “Description” column and the “Operator” will appear in the “Type” column. In the screen below, the migration has already occurred.



22. Using the same screen, it is time to add the second filter. This filter will always be the same for the "Closed Date". Its purpose is to ensure that all records without a "Closed Date" are included (i.e. all records with an Open, Pending, or Bypass status).
23. Click on the dropdown menu for "Operator" and select "Equal" and instead of typing in a date in the "From" field this time, type a "#" (uppercase "3" on the keyboard), without the quote signs, into the "From" field (see below).



24. To move the filter across to the "Selections" window, click on the right-pointing "Add" arrow. Once it has migrated to the "Selections" window, the "#" will appear in the "Description" column and the "Operator" will appear in the "Type" column. The screen below shows the "Operator" and "#" after migration. To accept both filters you have created, click on the "OK" button.



**Results**

The Grievance History Report should refresh on your screen with less data than before. Scroll all the way to the right of the report. You will now be able to see that the “Closed Date” filters you just applied are working correctly (see below).

BI Reports										
Organization Management   Personnel Administration   Layoff Data   Time Management   Payroll   Financials   HRM Performance Measurement   <b>Grievance Reporting</b>										
Grievance History Report										History, Back, Forward
Sub-Article Name4	Sub-Art #4	Master Agreement5	Article Name5	Article #5	Sub-Article Name5	Sub-Art #5	Grievance Status	Close Date	Close Reason	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	12/21/2007	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	12/21/2007	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/05/2007	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	07/24/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/22/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	07/19/2007	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	08/07/2007	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Open	06/01/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/20/2007	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Open	06/07/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/07/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/21/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	05/09/2008	Withdrawn	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	11/08/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/06/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	04/24/2008	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	09/28/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	11/21/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	07/27/2007	Settled	
Not assigned	#	Not assigned	Not assigned	#	Not assigned	#	Closed	06/09/2007	Settled	