

Business Intelligence Grievance Totals by Agency Report via Portal

- Purpose** Use report to easily obtain detailed grievance data based on selection criteria. Obtain a count of the primary (as designated by each agency) Article/Sub-Article of each Grievance per agency. This report will break on each Master Agreement and will sort by Article Name and corresponding Sub-Article Name(s) it was filed with. This is similar to the Grievance Master Agreement Report. Grievances without a named Sub-Article will be included in the count for the Article Name itself.
- Trigger** Unique requests for data on grievance counts or activity, the need to audit data entries, GMAP preparations.
- 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 20, 2012	Created.
February 5, 2013	Corrected link in the menu path

Menu Path <https://wahrms.wa.gov/irj/> → BI Reports → Grievance Reporting → Grievance Totals by Agency Report

Transaction Code NA

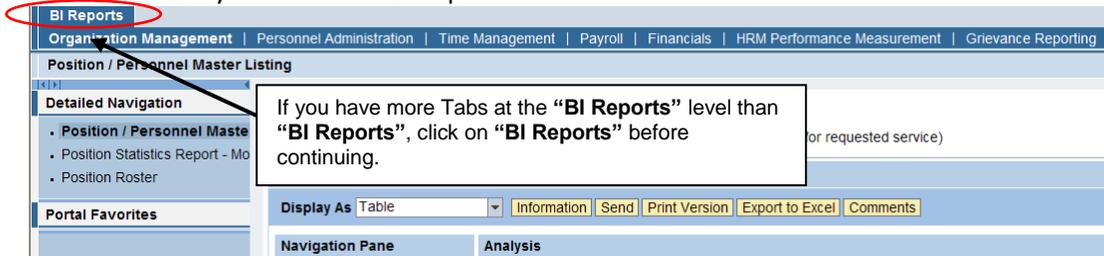
Helpful Hints Further instructions on BI Report features are available under BI Training materials, including the “BW/BI Grievance InfoCube” Self-Paced Learning Materials.

Procedure

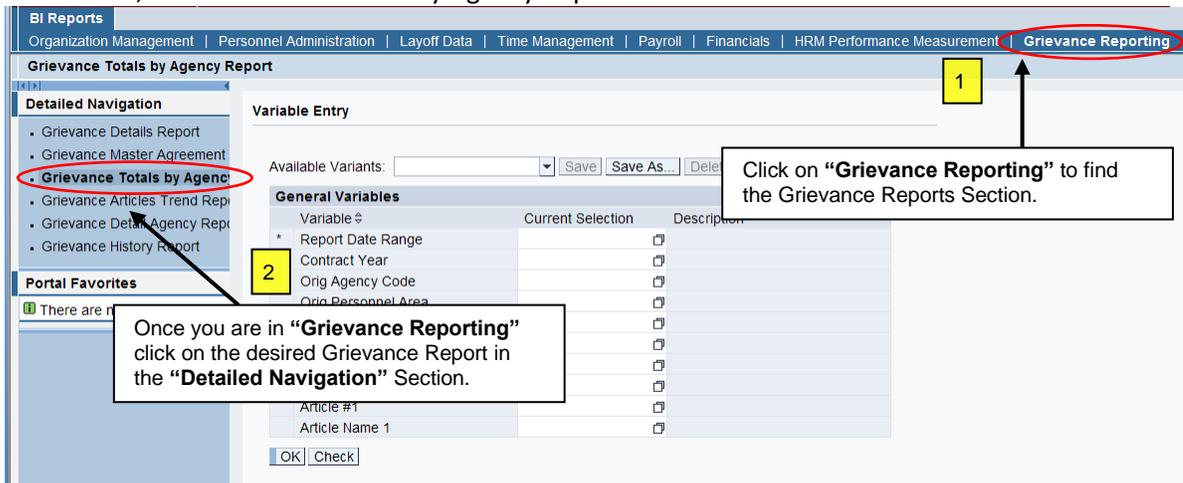
1. Go to the Portal using your normal Production link: <https://wahrms.wa.gov/irj/portal> . Sign onto “BI Reports” by entering your “User ID” (your complete state agency e-mail address) and your “Password” (your state agency network password). Press the “Enter” key or click on the “Log On” button.



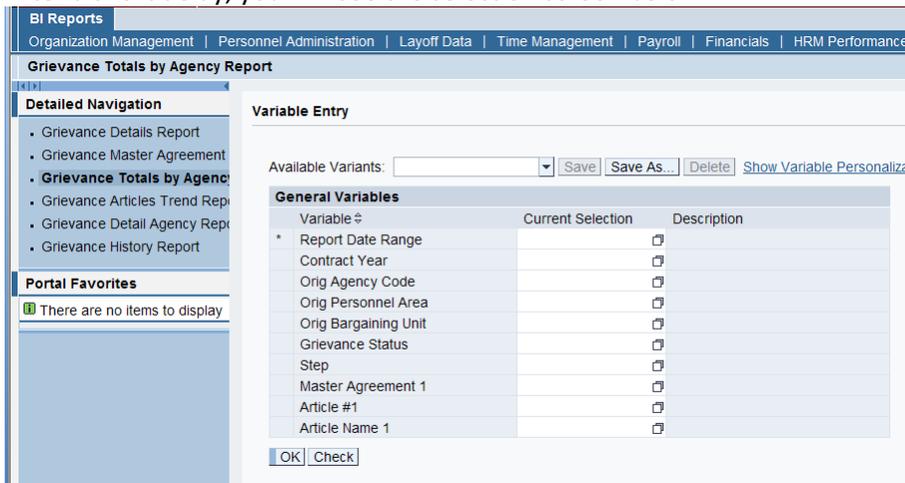
2. The screen you see next will vary depending on your security access. You should see a Tab that says, “BI Reports” with other Tabs under it. If you have more Tabs at the “BI Reports” level, make sure that you have the “BI Reports” Tab selected.



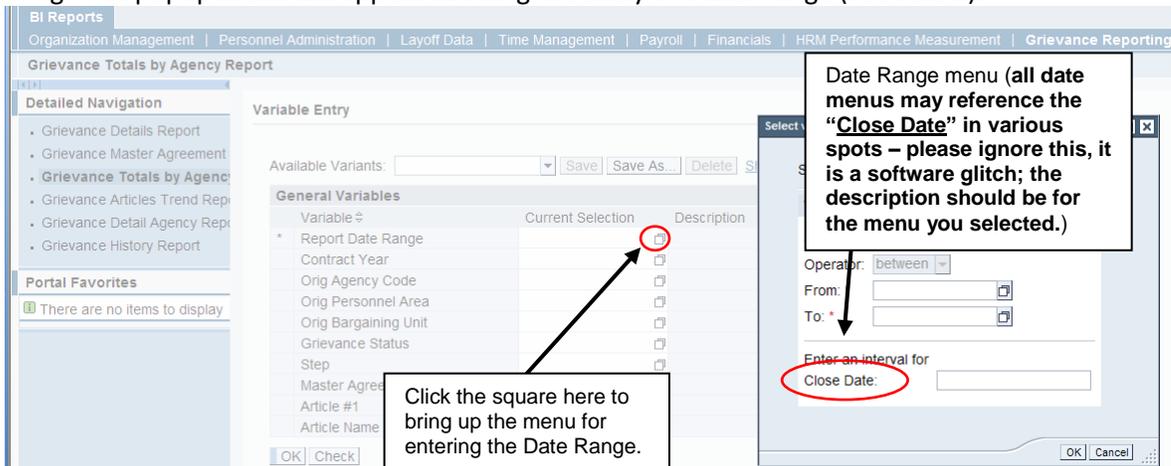
3. Under “BI Reports”, click on “Grievance Reporting”. Your screen should look similar to the one below. It will default to the top report selection in the “Detailed Navigation” window on the left. In this case, it is “Grievance Totals by Agency Report”.



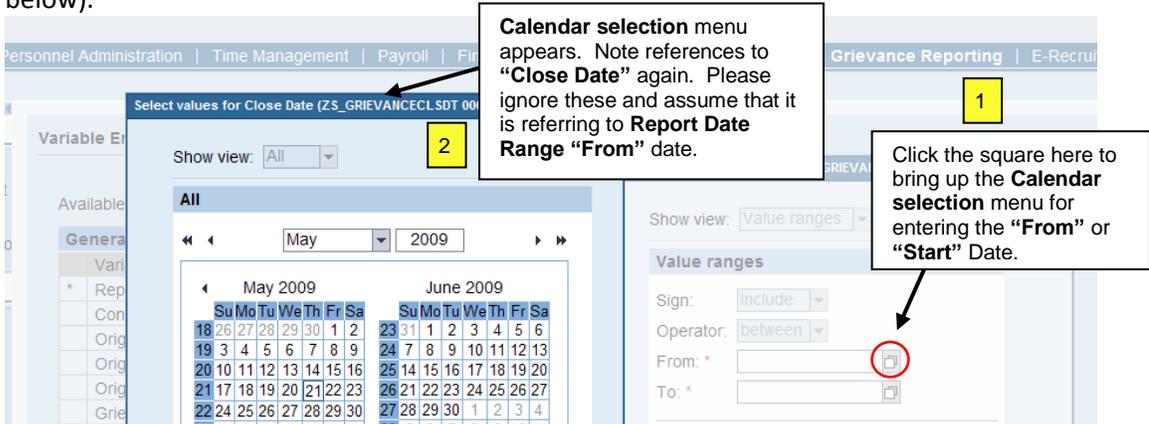
- To run “Grievance Totals by Agency Report”, click on it in the “Detailed Navigation” window. After a short delay, you will see the selection screen below.



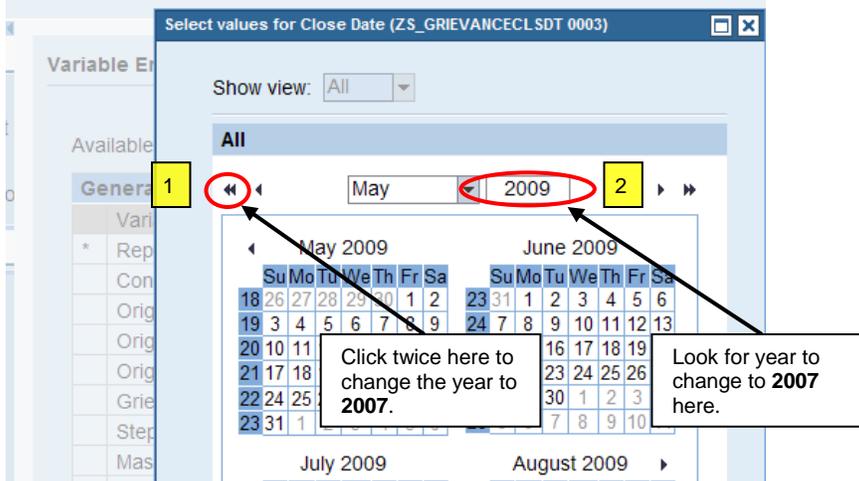
- Of the fields that appear on the Selection Screen, only the “Report Date Range” field requires an entry. Enter a valid date range to restrict the report results to a specific time period. To do this, click on the small square on the right side of the “Current Selection” box for “Report Date Range”.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



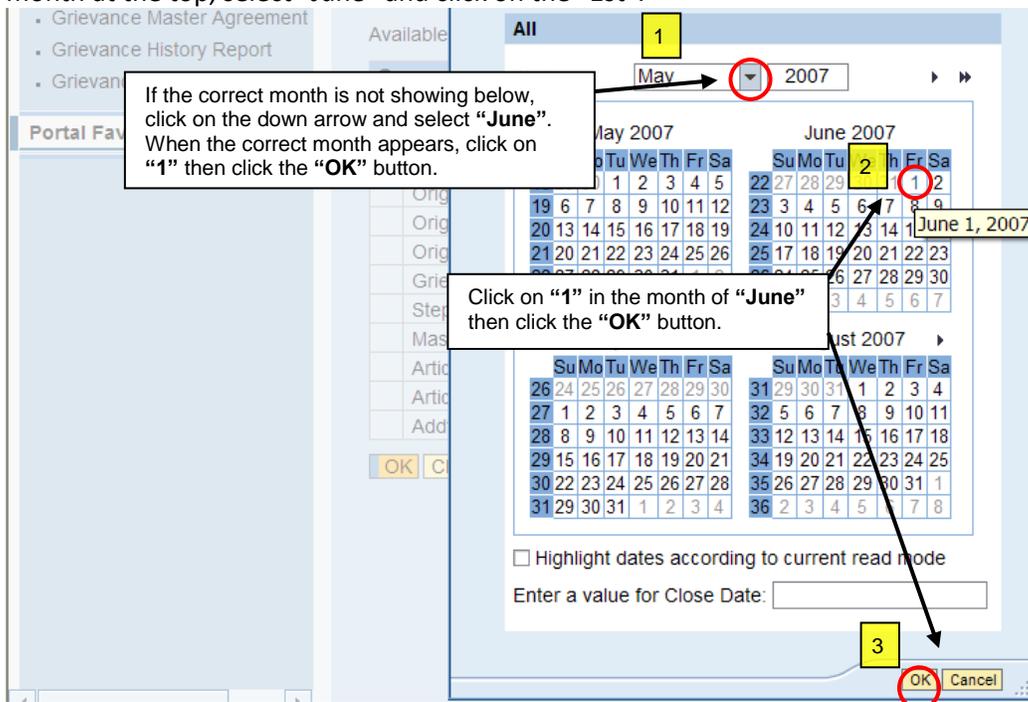
- Click on the square on the right side of the “From” box to get to the “Calendar” menu (see below).



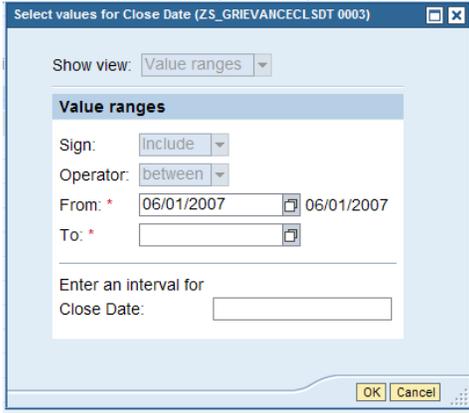
7. In this example, we are going to use the “Report Date Range” of June 1, 2007 to June 15, 2007. To enter the “From” date of June 1, 2007, click twice (waiting for the screen to refresh after each click) on the double left arrow to change the year to 2007 (see below).



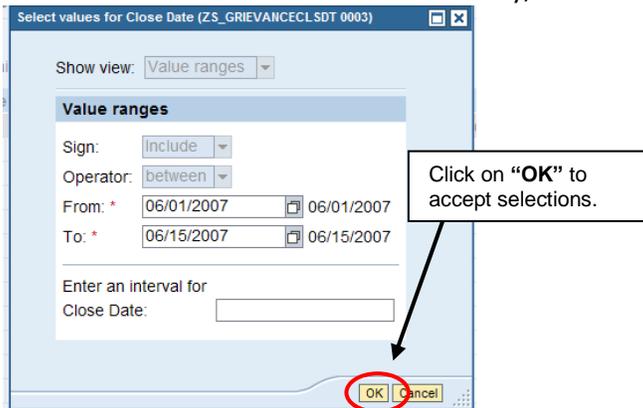
8. Since the month of June is already showing as one of the four months on the menu, you can just click on “June 1st” then click the “OK” button. Otherwise you could click the down arrow for month at the top, select “June” and click on the “1st”.



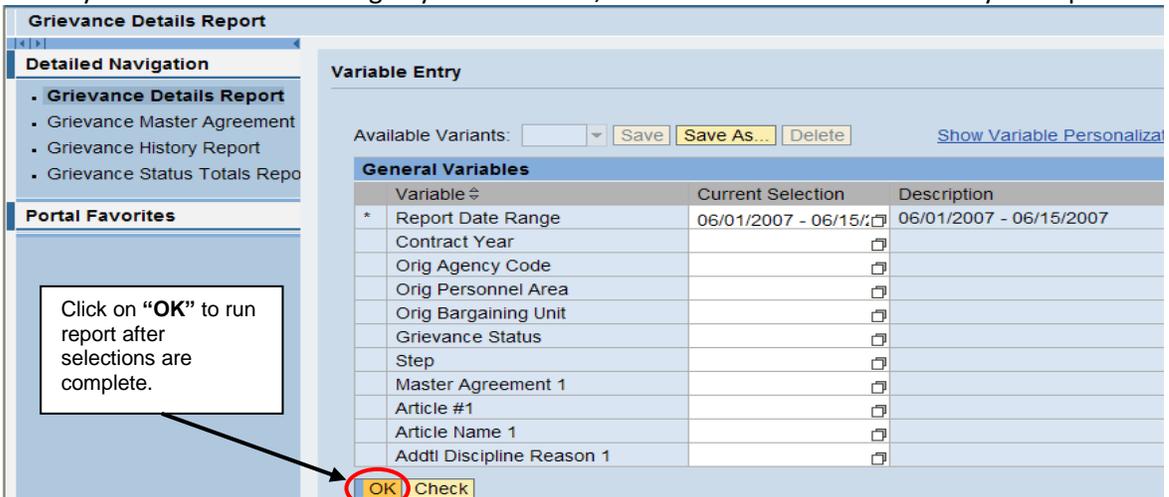
- You should see the “From” box filled in with 06/01/2007 (your settings may be formatted for DD/MM/YYYY, so you may see 01/06/2007).



- 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.



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- 13. The “Grievance Totals by Agency Report” should appear on your screen, similar in appearance to the screen below. Because this report does not show the detail of each grievance record, but does show counts and totals of records on the right and at the bottom, this is called a “count” type report. Before you can use the report, however, you must add the “Closed Date” filters.

The screenshot shows the BI Reports interface. At the top, there is a navigation bar with links for Organization Management, Personnel Administration, Layoff Data, Time Management, Payroll, Financials, HRM Performance Measurement, and Grievance Reporting. Below this is the title 'Grievance Totals by Agency Report' with a 'History' and 'Back' link. The main area is divided into two sections: 'Detailed Navigation' on the left and the report data on the right. The 'Detailed Navigation' pane lists various report options, with 'Grievance Totals by Agency Report' selected. The report data is displayed in a table with columns for Contract YR1, Master Agreement1, Article Name1, Sub-Article Name1, and a column for counts. The table shows data for Contract YR1 07-09 and 05-07, with various Master Agreements and Article Names. The counts for each row are listed in the rightmost column.

- 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.

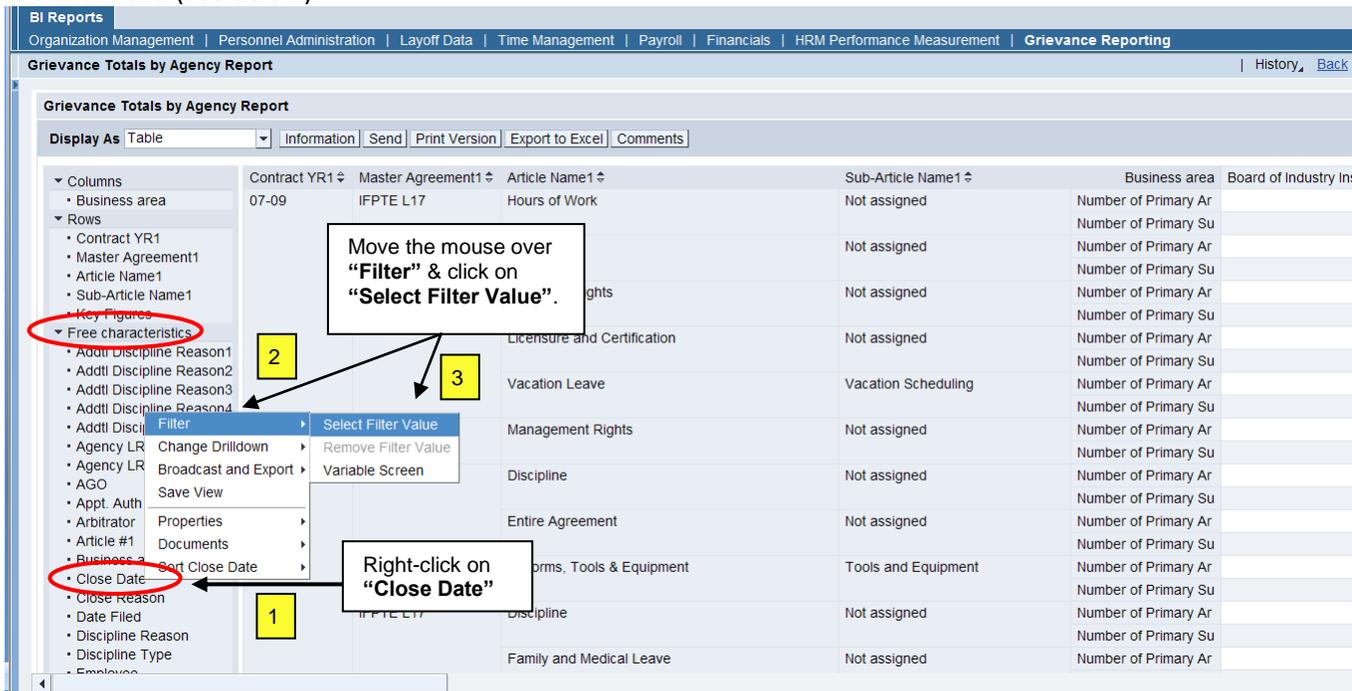
This screenshot is similar to the previous one but includes a callout box. A red circle highlights a left-pointing arrow located above the 'Detailed Navigation' title. A black arrow points from this circle to a callout box containing the text: 'Click on the left-pointing arrow above the “Detailed Navigation” title to collapse this window and have more room for report viewing.' The rest of the interface, including the navigation bar and the report data table, is the same as in the previous screenshot.

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- 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 Totals by Agency Report” titles (see red circle below).

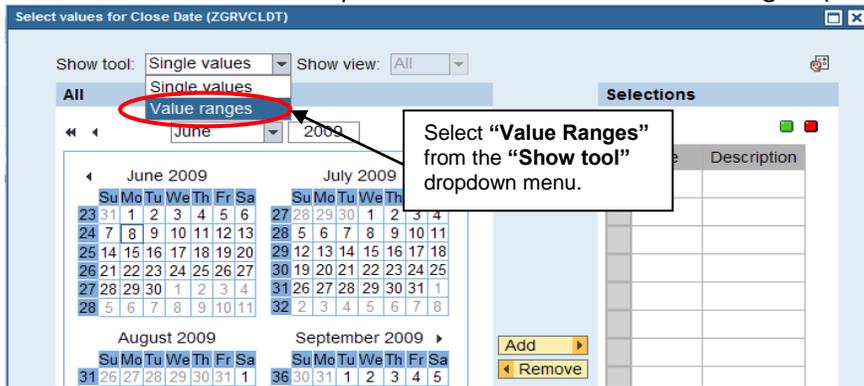


- Right-click on “Closed Date” in the “Free characteristics” area on the left side of the screen. In the popup menu, move the mouse pointer over “Filter” and click on “Select Filter Value” from the sub menu (see below).

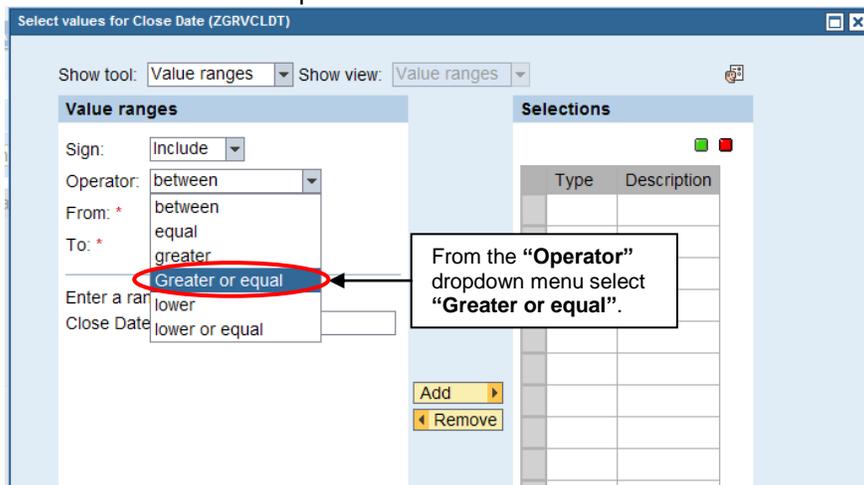


- The “Closed Date” Filter menu should appear on the screen. This is the beginning of the “Close Date” filter process. You will have to apply two “Close Date” filters every time you run a Grievance report in BI to get accurate results.

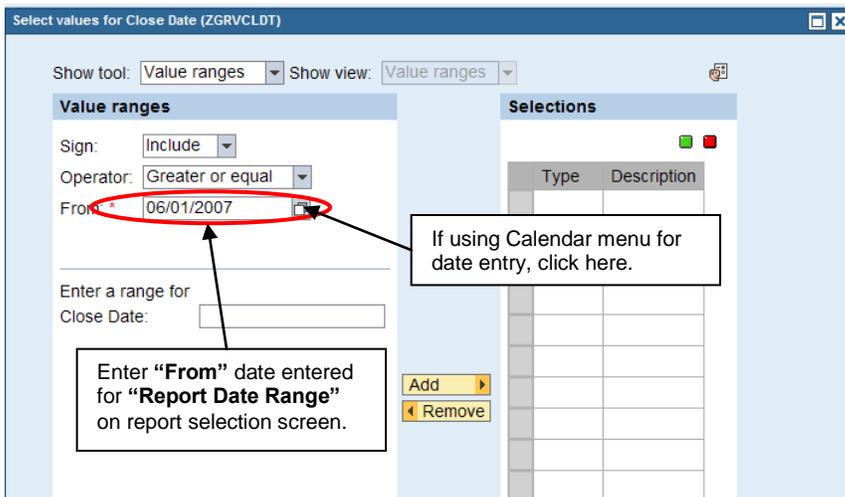
18. Click on the “Show tool” dropdown menu and select “Value Ranges” (see below)



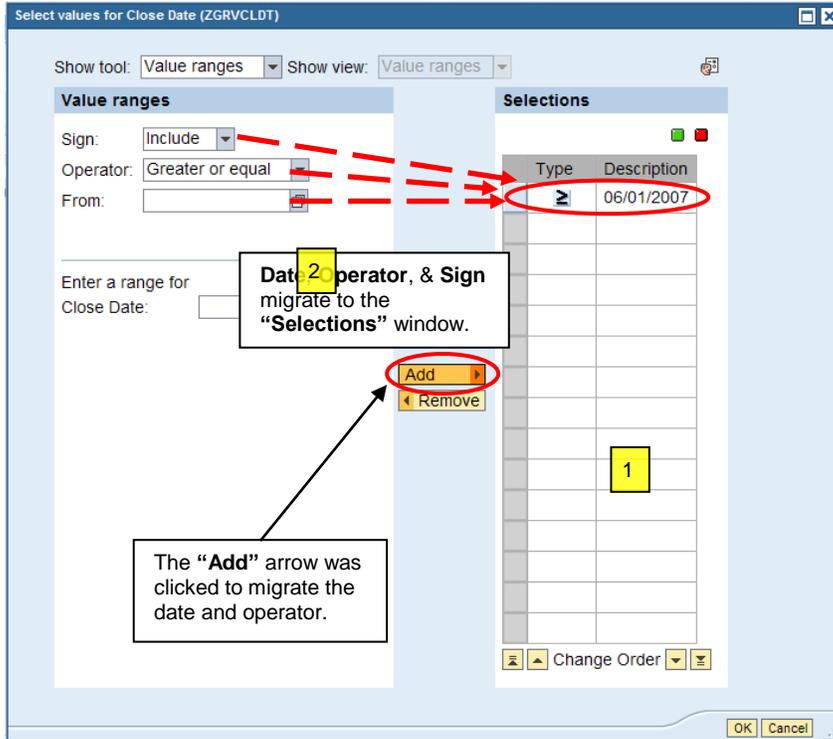
19. The screen should change to the one seen below. Click on the dropdown menu for “Operator” and select “Greater or equal”.



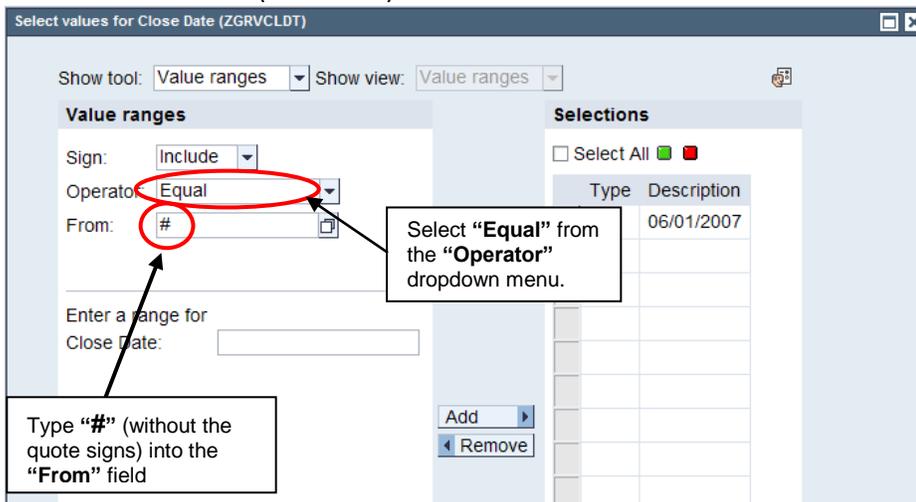
20. In the “From” field, type the date you used in the “Report Date Range” “From” field (i.e. the “Start” date of your selection range (see item 9 of these instructions)). The date may also be entered by clicking on the square at the right end of the field and selecting from the calendar menu (see item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



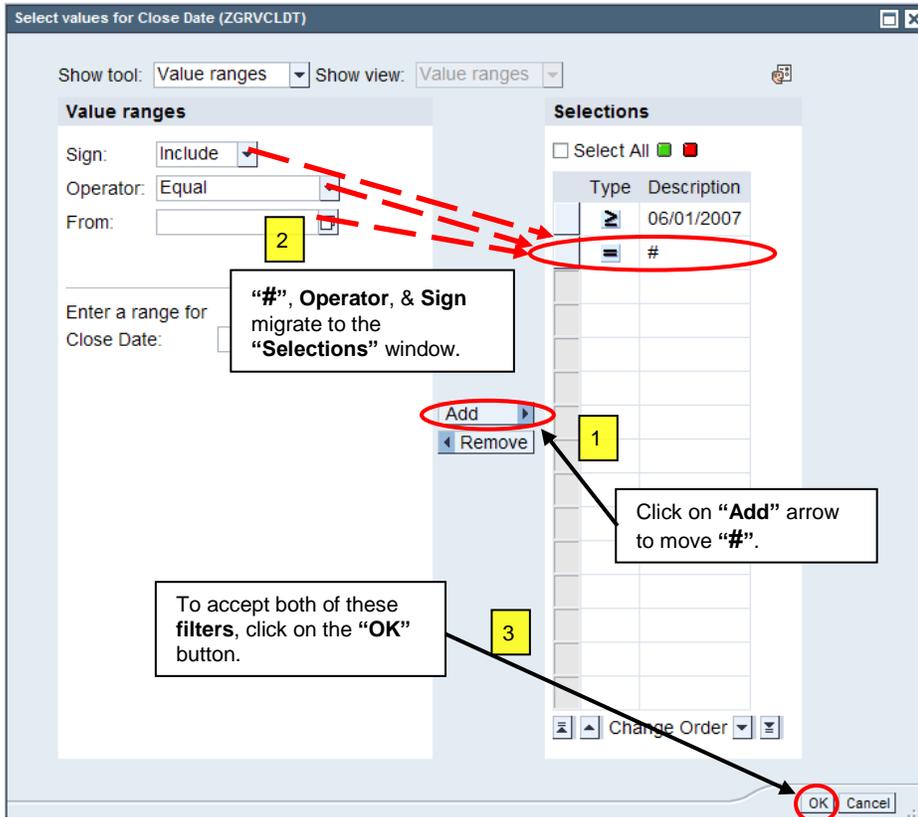
- Now that you have selected the “Operator” and the “From” date, the filter needs to be migrated to the “Selections” window on the right side. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the date will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



- 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).
- 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.



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Results

The Grievance Master Agreement 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 | **Grievance Reporting**

Grievance Totals by Agency Report | History | Back | Forward

Grievance Totals by Agency Report

Display As: Table | Information | Send | Print Version | Export to Excel | Comments

Columns	Contract YR1	Master Agreement1	Article Name1	Sub-Article Name1	Business area	Board of Industry Ins Appeals	Department of Agricult
• Business area	07-09	IFPTE L17	Hours of Work	Not assigned	Number of Primary Ar		
• Contract YR1		WFSE	Discipline	Not assigned	Number of Primary Ar		
• Master Agreement1			Employee Rights	Not assigned	Number of Primary Ar		
• Article Name1			Licensure and Certification	Not assigned	Number of Primary Su		
• Sub-Article Name1			Management Rights	Not assigned	Number of Primary Ar		
• Key Figures					Number of Primary Su		
• Free characteristics					Number of Primary Ar		
• Addtl Discipline Reason1					Number of Primary Su		
• Addtl Discipline Reason2					Number of Primary Ar		
• Addtl Discipline Reason3					Number of Primary Su		
• Addtl Discipline Reason4					Number of Primary Ar		
• Addtl Discipline Reason5					Number of Primary Su		
• Agency LR Contact	05-07	Coalition	Discipline	Not assigned	Number of Primary Ar		
• Agency LRO/OFM Rep			Uniforms, Tools & Equipment	Tools and Equipment	Number of Primary Ar		
• AGO					Number of Primary Su		
• Appt. Auth					Number of Primary Ar		
• Arbitrator					Number of Primary Su		
• Article #1		IFPTE L17	Discipline	Not assigned	Number of Primary Ar		
• Business area			Hours of Work	Not assigned	Number of Primary Su		
• Close Date					Number of Primary Ar		
• Close Reason					Number of Primary Su		
• Date Filed					Number of Primary Ar		
• Discipline Reason		SEIU 1199	Compensation	Not assigned	Number of Primary Ar		
• Discipline Type			Discipline	Not assigned	Number of Primary Su		
• Employee					Number of Primary Ar		