

**Business Intelligence Grievance Details Report via Portal**

- Purpose** Use report to easily obtain detailed grievance data based on selection criteria. Agencies and the Labor Relations Division of OFM use this report to prepare to report to the Governor’s Office for GMAP. Report will not show all detail for each Grievance, only primary/first Article. Due to size, consider exporting the report to Excel to better organize data as desired.
- 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
June 6, 2012	Created.

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

**Transaction Code** NA

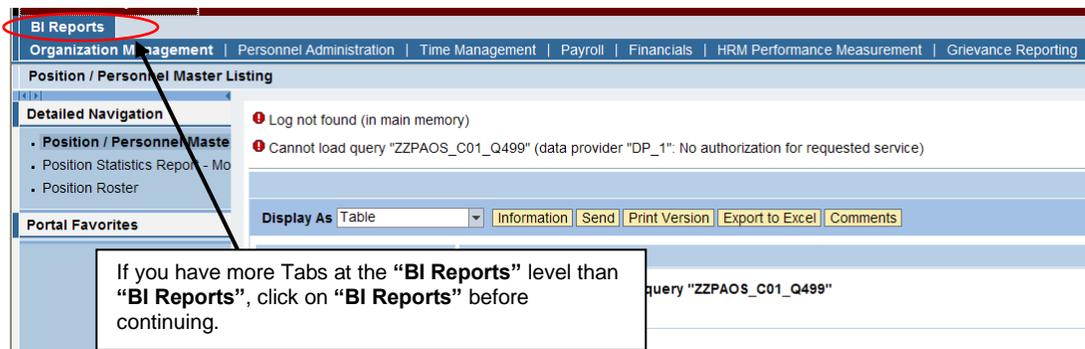
**Helpful Hints** Further instructions on BI Report features are available under BI Training materials, including the “BW/BI Grievance InfoCube” Self-Paced Learning Materials.

**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 Details Report”.

## Title: Business Intelligence Grievance Details Report via Portal

Click on **"Grievance Reporting"** to find the Grievance Reports Section.

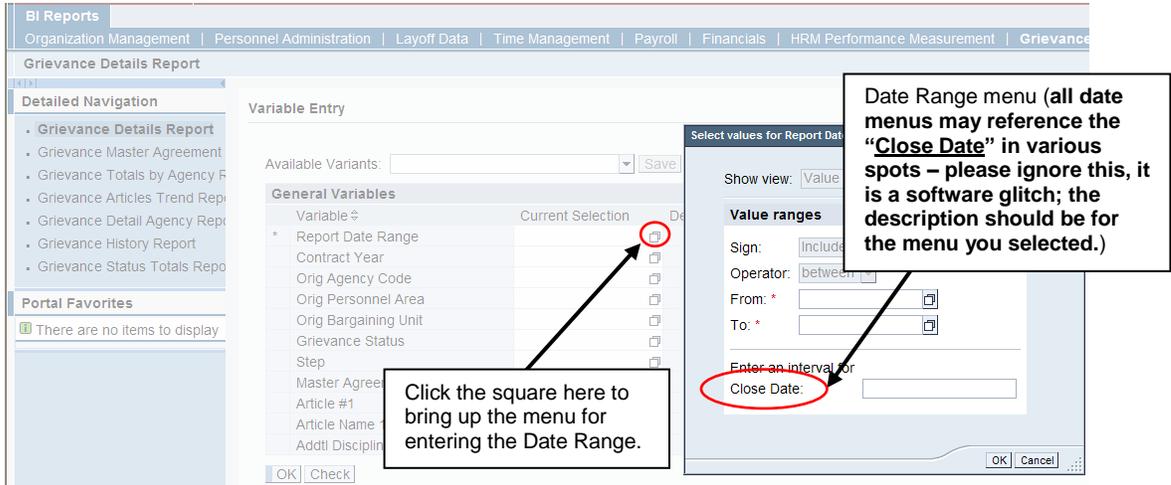
Once you are in **"Grievance Reporting"** click on the desired Grievance Report in the **"Detailed Navigation"** Section.

- To run "Grievance Details Report", click on it, if it isn't already in bold. You will see the selection screen below.

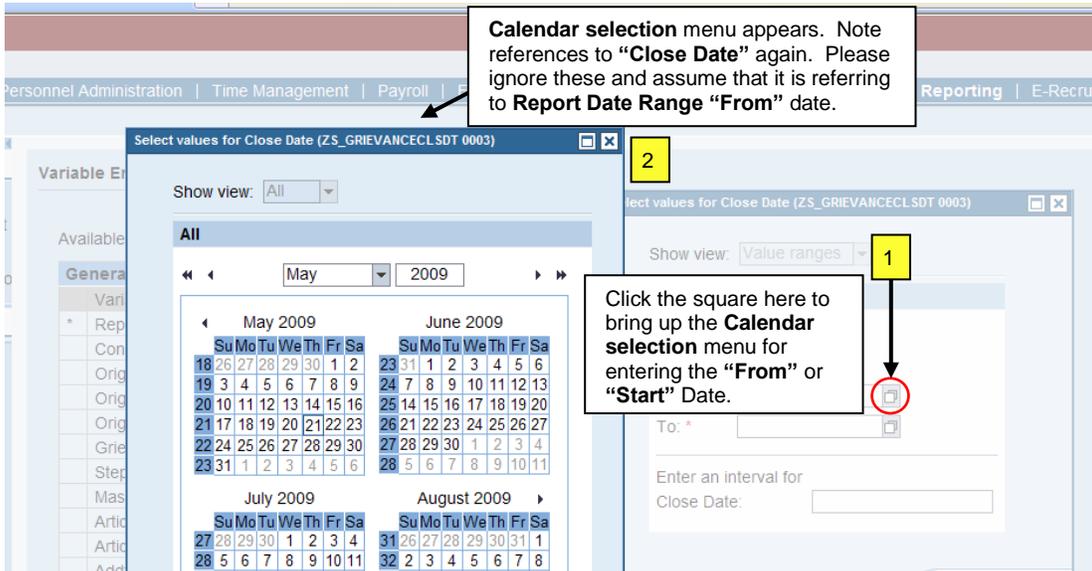
Variable	Current Selection	Description
* Report Date Range	<input type="checkbox"/>	
Contract Year	<input type="checkbox"/>	
Orig Agency Code	<input type="checkbox"/>	
Orig Personnel Area	<input type="checkbox"/>	
Orig Bargaining Unit	<input type="checkbox"/>	
Grievance Status	<input type="checkbox"/>	
Step	<input type="checkbox"/>	
Master Agreement 1	<input type="checkbox"/>	
Article #1	<input type="checkbox"/>	
Article Name 1	<input type="checkbox"/>	
Addtl Discipline Reason 1	<input type="checkbox"/>	

- 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).

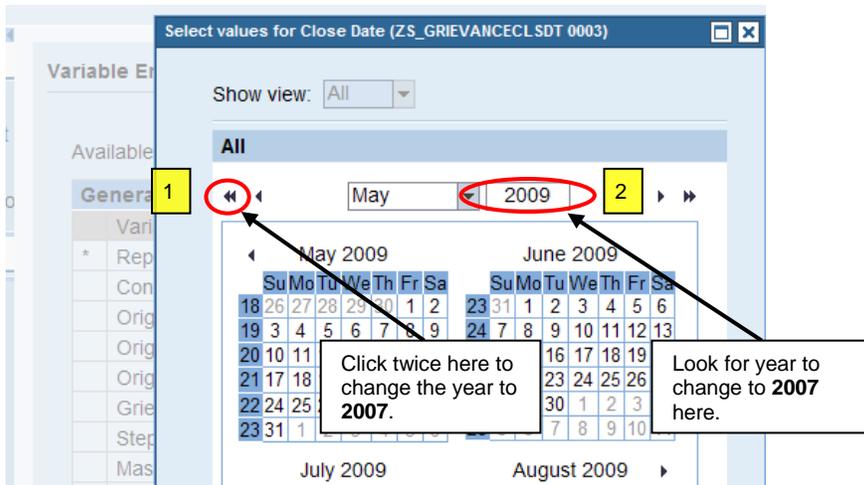
Title: Business Intelligence Grievance Details Report via Portal



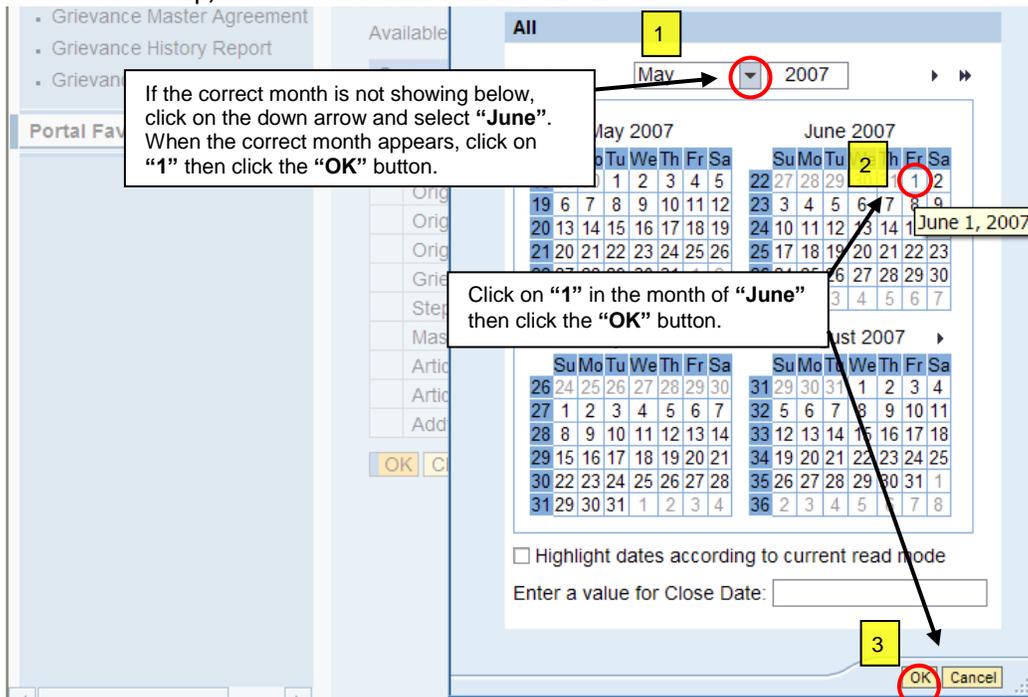
- Click on the square on the right side of the "From" box to get to the "Calendar" menu (see below).



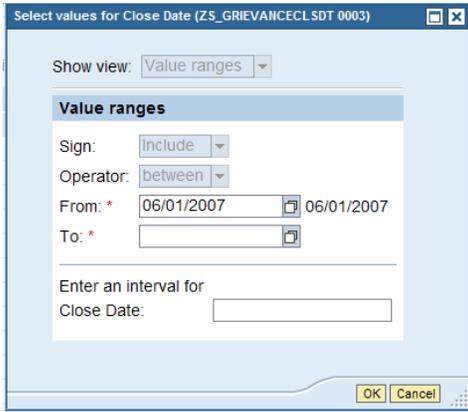
- In this example, we are going to use the "Report Date Range" of June 1, 2007 to June 15, 2007. To enter the "From" date of June 1, 2007, click twice (waiting for the screen to refresh after each click) on the double left arrow to change the year to 2007 (see below).



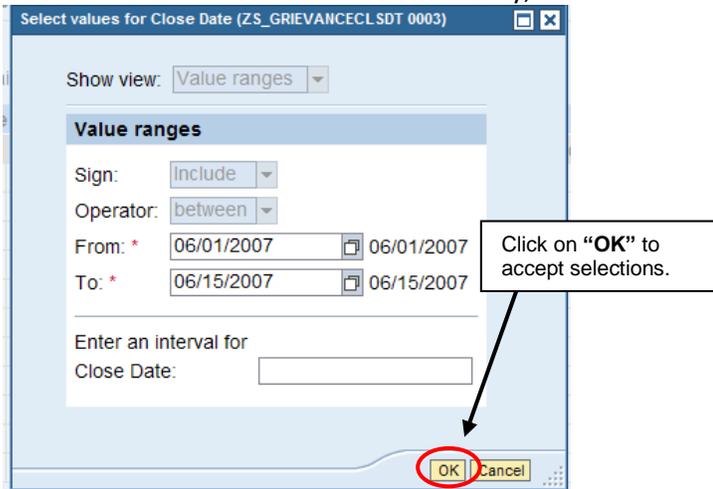
- Since the month of June is already showing as one of the four months on the menu, you can just click on "June 1st" then click the "OK" button. Otherwise you could click the down arrow for month at the top, select "June" and click on the "1st".



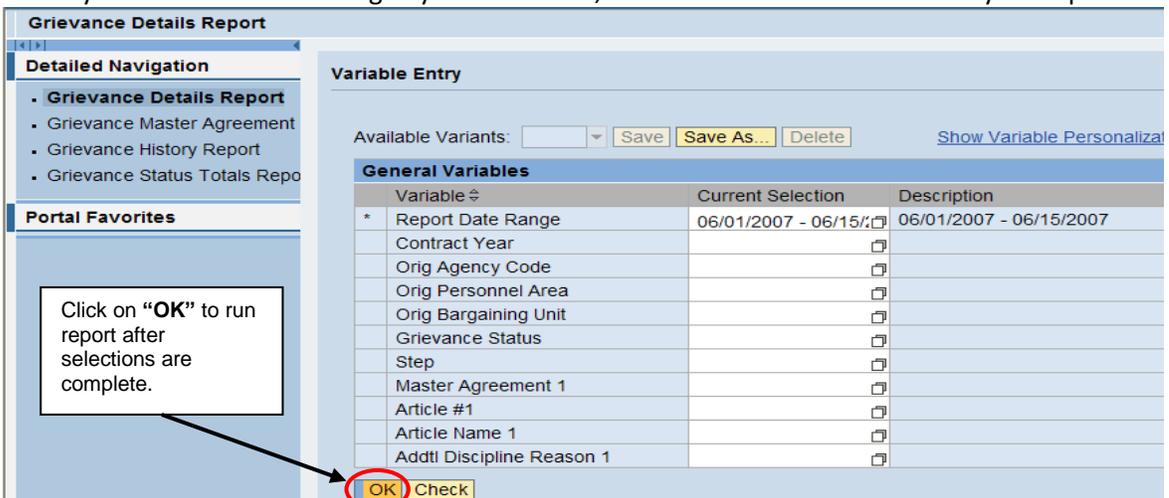
- You should see the "From" box filled in with 06/01/2007 (your settings may be formatted for DD/MM/YYYY, so you may see 01/06/2007).



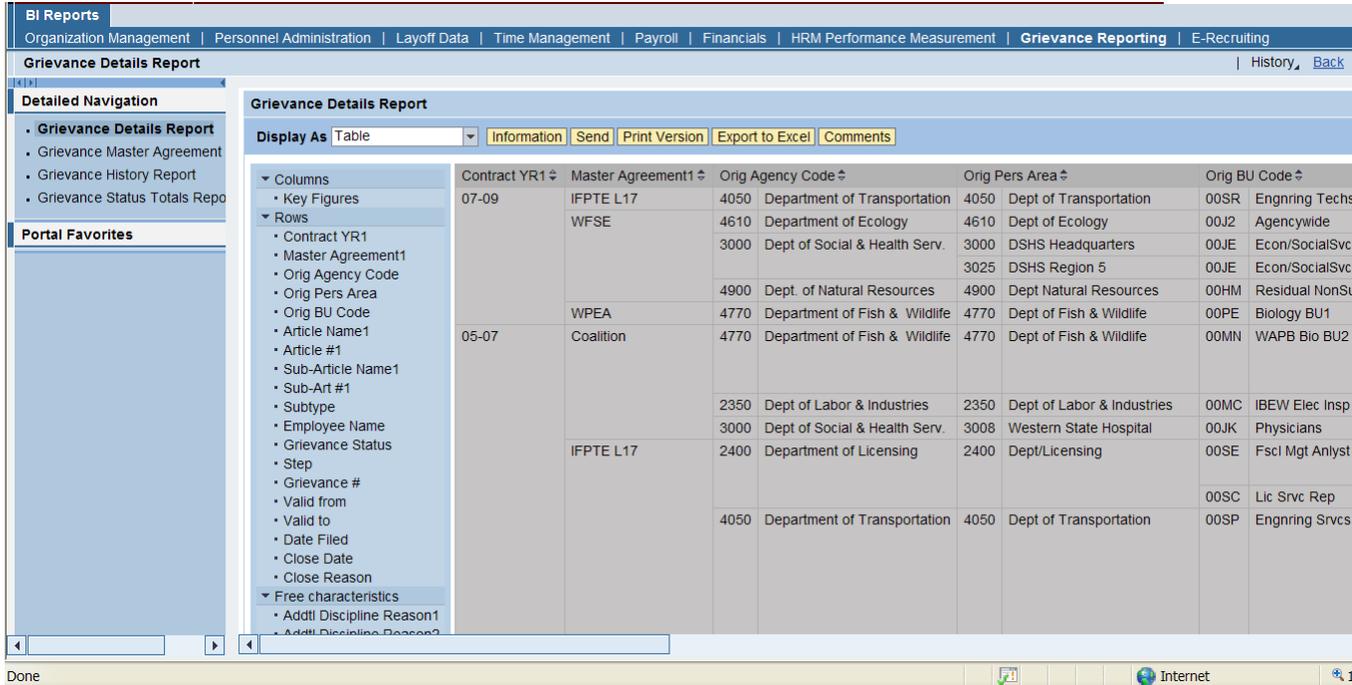
- You have the option of repeating the same instructions for the "To" date (June 15, 2007), or you can type the date in directly following the same format as the "From" date. You should see the screen below. When it is filled out correctly, click the "OK" button.



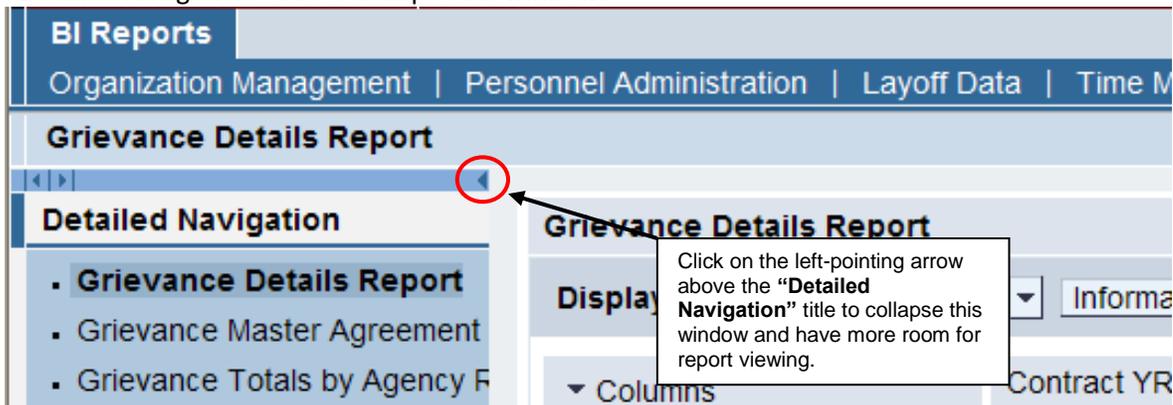
- The screen will return to the original selection screen with the "Report Date Range" filled in. At this point, you may make additional selections using the other fields on the selection screen to further narrow the selected data returned. Once the report is run, you will also be able to apply "filters" 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.



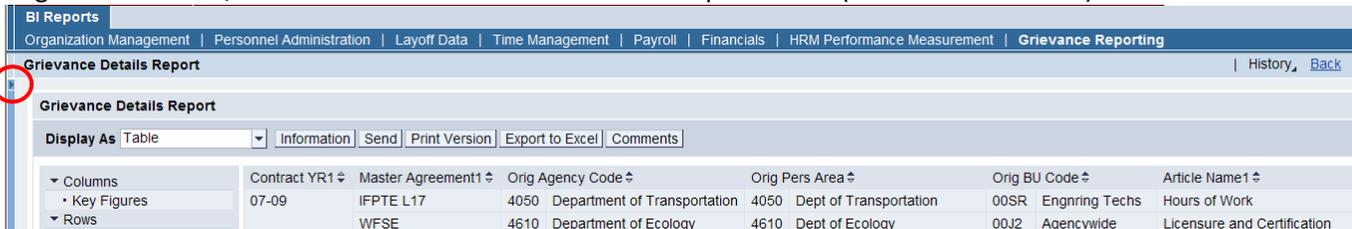
13. The “Grievance Details Report” should appear on your screen, similar in appearance to the screen below. Because you are seeing one line of detail for each grievance record, this type of report is called a “detail” type report. Before you can use the report, however, you **must** add the “Closed Date”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



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.

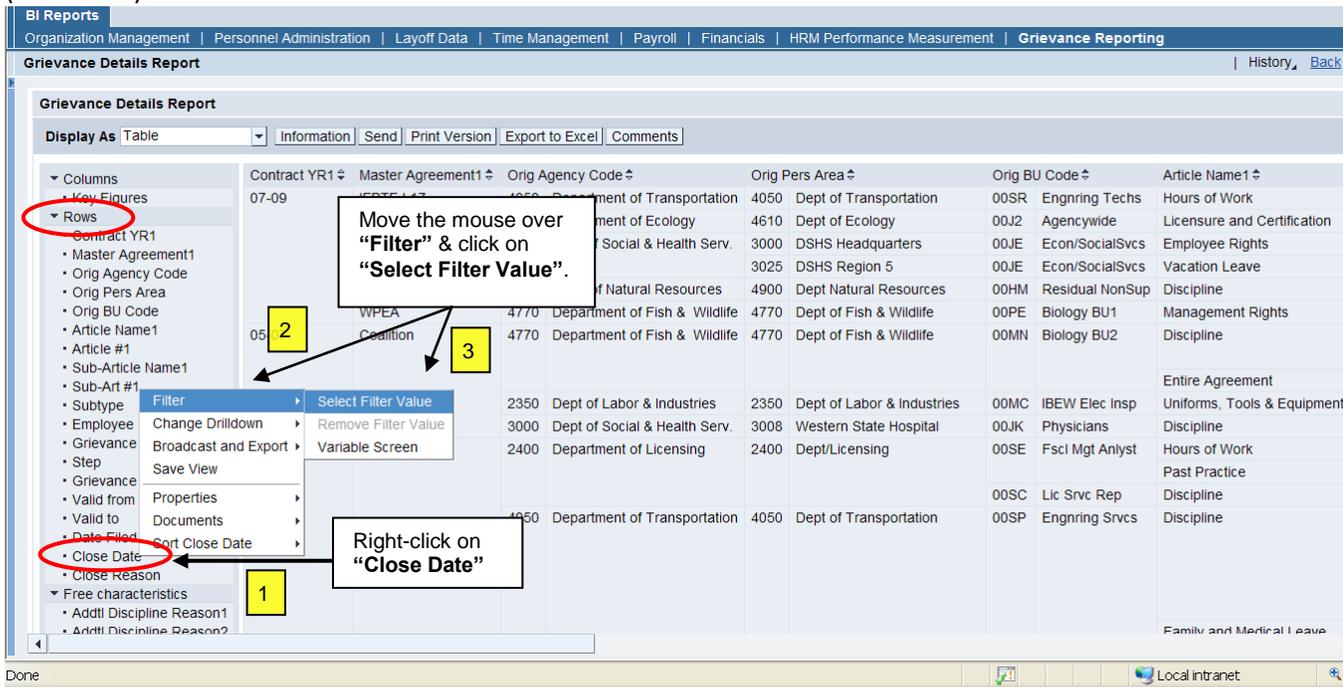


15. Your screen should now appear without the “Detailed Navigation” window. You may bring back the “Detailed Navigation” window at any time by clicking on the right-pointing arrow on the left edge of the screen, between the two “Grievance Details Report” titles (see red circle below).

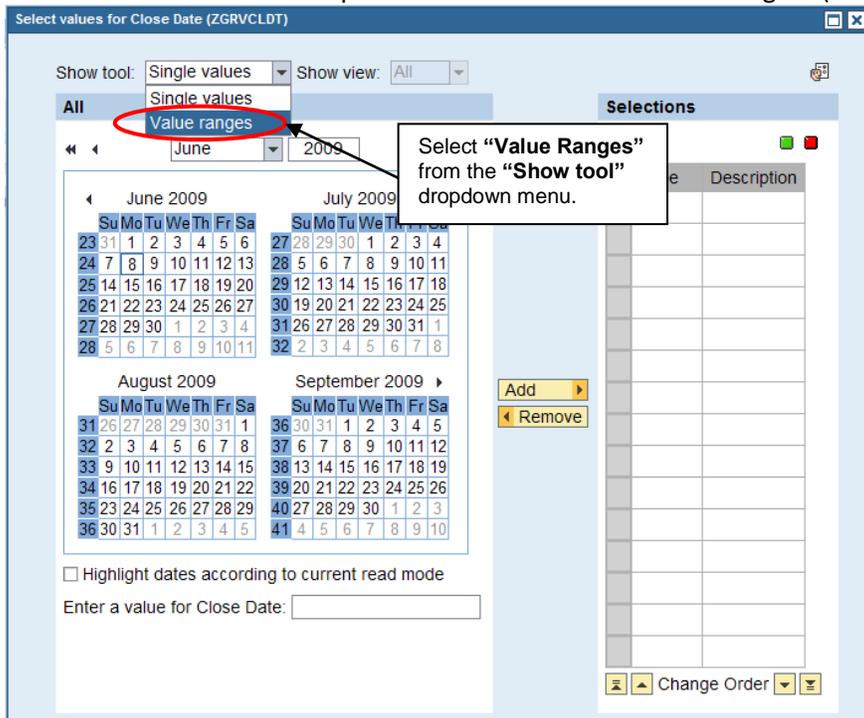


Title: Business Intelligence Grievance Details Report via Portal

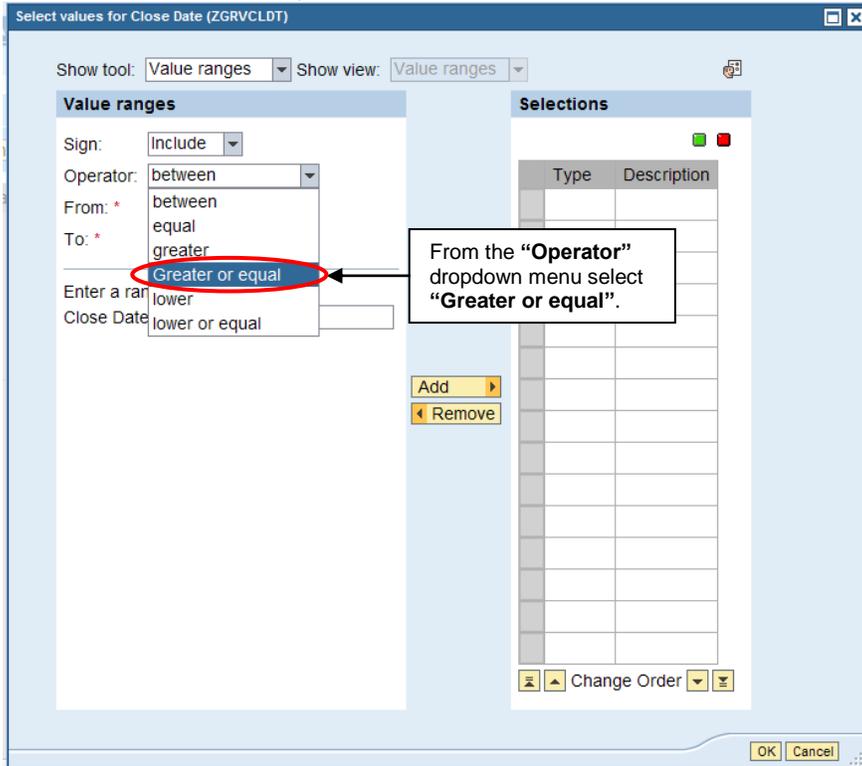
- Right-click on "Closed Date" in the "Rows" area on the left side of the screen. In the popup menu, move the mouse pointer over "Filter" and click on "Select Filter Value" from the sub menu (see below).



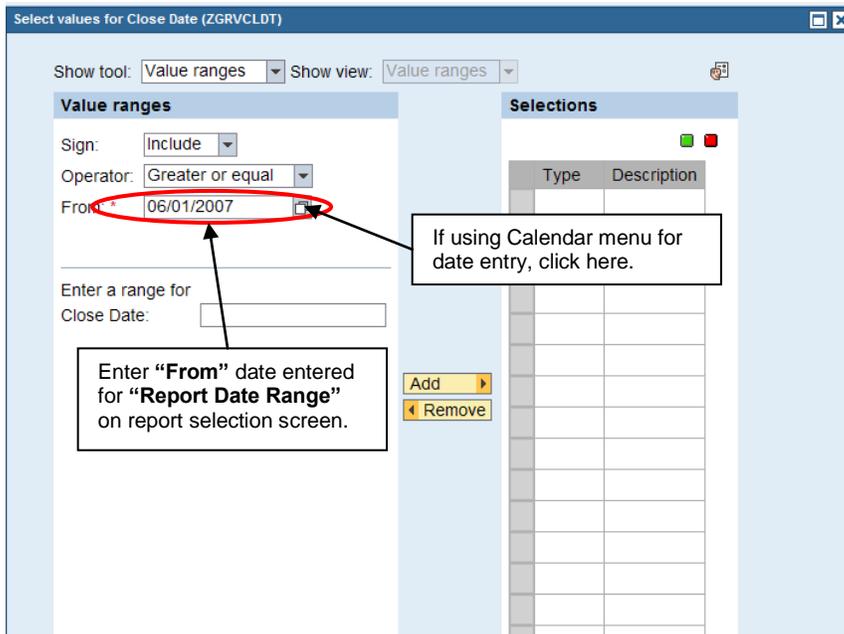
- The "Closed Date" Filter menu should appear on the screen. This is the beginning of the "Close Date" filter process. You will have to apply two "Close Date" filters every time you run a Grievance report in BI to get accurate results.
- Click on the "Show tool" dropdown menu and select "Value Ranges"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



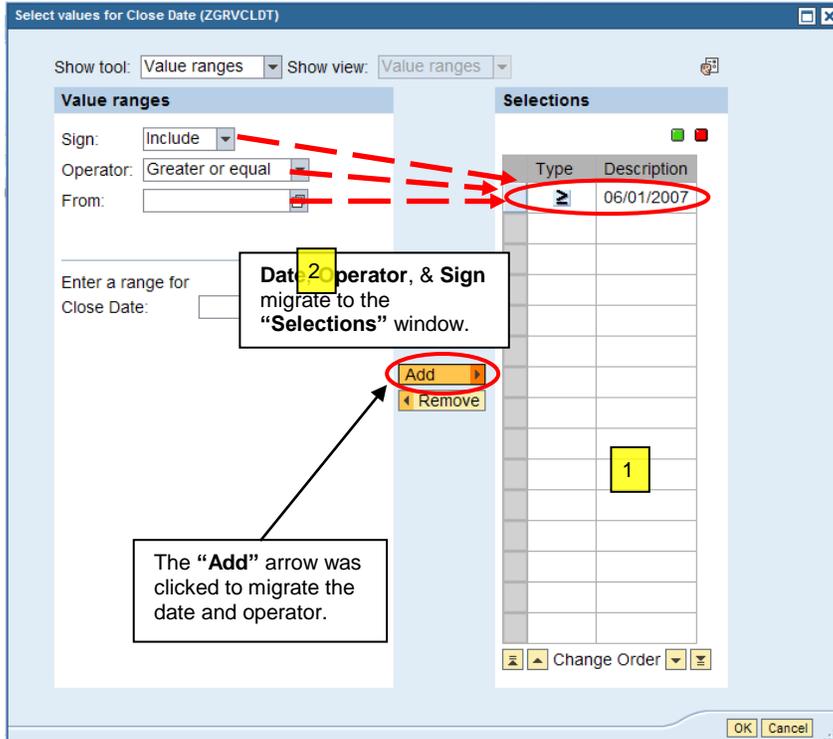
19. The screen should change to the one seen below. Click on the dropdown menu for “Operator” and select “Greater or equal”.



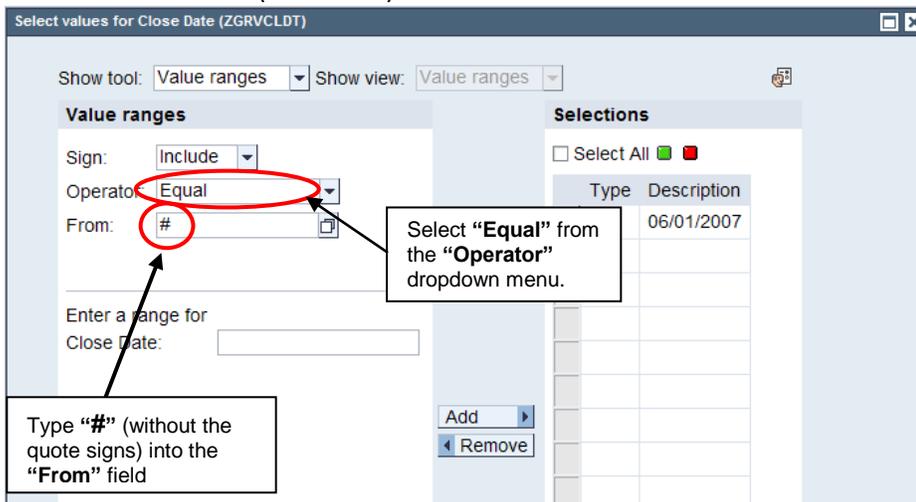
20. In the “From” field, type the date you used in the “Report Date Range” “From” field (i.e. the “Start” date of your selection range (see item 9 of these instructions)). The date may also be entered by clicking on the square at the right end of the field and selecting from the calendar menu (see item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



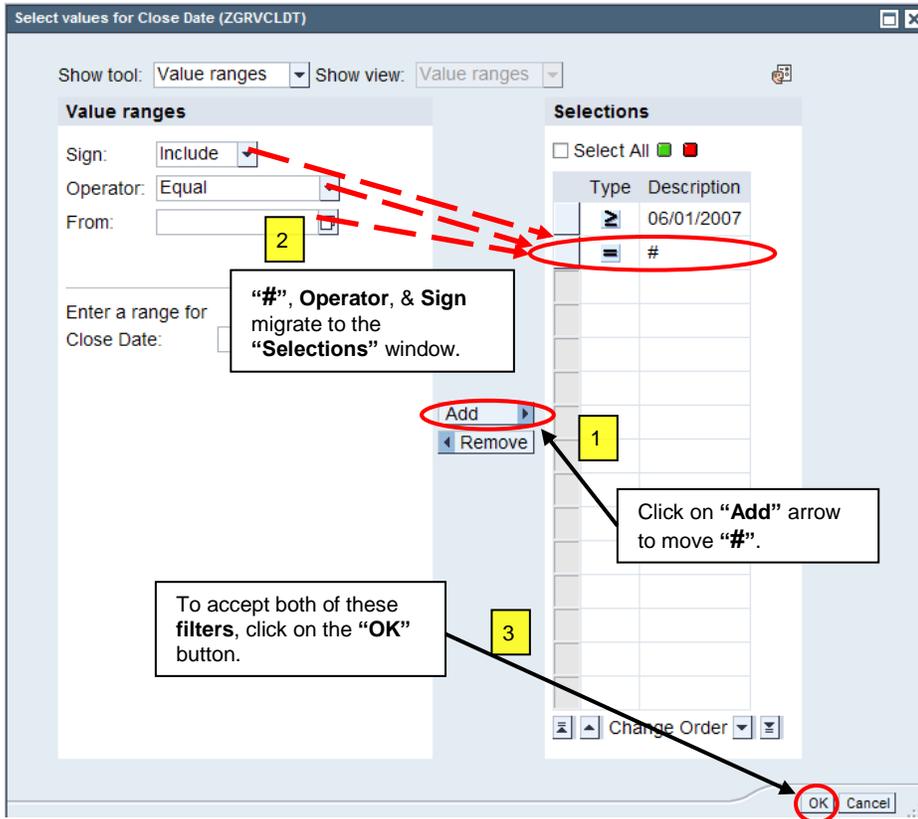
- Now that you have selected the “Operator” and the “From” date, the filter needs to be migrated to the “Selections” window on the right side. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the date will 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.



## Results

The Grievance Details 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 Details Report										
Last Data U										
Alt #1	Subtype	Employee Name	Grievance Status	Step	Grievance #	Valid from	Valid to	Date Filed	Close Date	Close Reason
	Issue		Closed	Step 3 Meeting		04/25/2007	12/31/9999	04/25/2007	12/21/2007	Withdrawn
	Issue		Open	Step 2 Response		06/14/2007	07/03/2007	05/29/2007	#	Not assigned
	Issue		Open	Pre-Arbitration Response		04/08/2007	05/06/2008	10/12/2007	#	Not assigned
	Disciplinary		Open	Step 1 Meeting		03/28/2007	06/26/2007	03/28/2007	#	Not assigned
	Issue		Closed	Step 1 Meeting		01/01/2007	12/31/9999	11/16/2007	12/21/2007	Withdrawn
	Disciplinary		Open	Step 2 Meeting		04/03/2007	12/31/9999	04/03/2007	#	Not assigned
	Issue		Open	Step 3 Meeting		04/02/2007	12/31/9999	04/02/2007	#	Not assigned
	Issue		Closed	Step 2 Response		06/14/2007	12/31/9999	05/07/2007	08/07/2007	Withdrawn
	Disciplinary		Closed	Step 3 Meeting		06/13/2007	12/31/9999	03/19/2007	10/15/2007	Settled
	Issue		Closed	Step 2 Meeting		03/27/2007	12/31/9999	03/27/2007	07/25/2007	Withdrawn
	Disciplinary		Open	Step 3 Meeting		05/21/2007	06/21/2007	03/26/2007	#	Not assigned
	Disciplinary		Closed	Step 3 Meeting		03/05/2006	12/31/9999	03/05/2006	07/27/2007	Settled
	Disciplinary		Open	Pre-Arbitration Response		06/12/2007	06/18/2007	03/12/2007	#	Not assigned
	Disciplinary		Open	Step 3 Response		05/16/2007	08/14/2007	02/09/2007	#	Not assigned
	Disciplinary		Open	Step 1 Response		06/15/2007	06/26/2007	06/11/2007	#	Not assigned
	Issue		Closed	Step 1 Meeting		02/08/2007	12/31/9999	02/08/2007	11/26/2007	Settled
	Issue		Closed	Step 2 Meeting		06/01/2007	12/31/9999	04/20/2007	08/09/2007	Withdrawn
	Issue		Open	Step 1 Response		06/05/2007	11/09/2007	05/24/2007	#	Not assigned
	Issue		Closed	Pre-Arbitration Meeting		03/13/2007	12/31/9999	03/14/2006	11/09/2007	Settled
	Disciplinary		Closed	Step 2 Response		02/05/2007	12/31/9999	12/04/2006	11/08/2007	Incorp into other grievar
	Issue		Closed	Panel Response		05/30/2007	12/31/9999	02/27/2007	07/24/2007	Settled