

**Business Intelligence Grievance Articles Trend Report via Portal**

- Purpose** Report is similar to Grievance Totals by Agency Report, however, it counts all Sub-Articles & Articles for each Grievance. If run statewide, the report breaks on each agency and is sorted by Article Name and corresponding Sub-Article Name(s). It will be a tool for agencies and OFM to identify trends in Articles allegedly violated. The report will also help identify potential “problem” Articles for discussion during subsequent bargaining sessions. Results look at more than the primary Article tab when searching, so it will look for any occurrence of the requested Article or Sub-Article filed when returning report results.
- 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.
February 5, 2013	Corrected link in the menu path

**Menu Path** <https://wahrms.wa.gov/irj/> → 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.

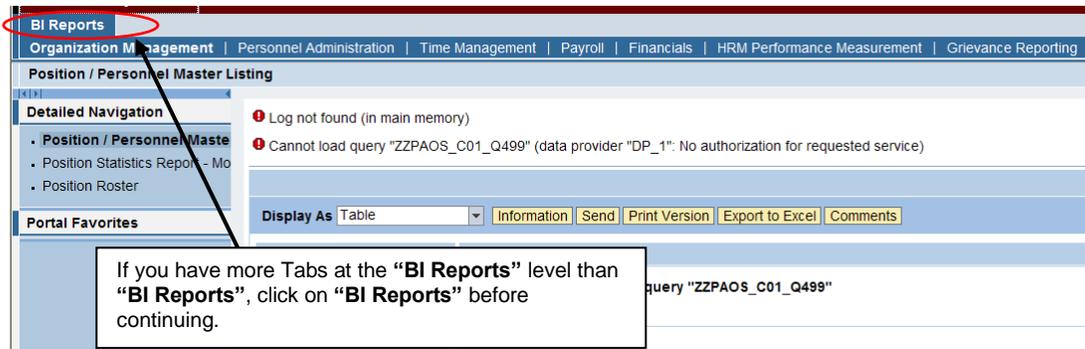
Article and Sub-Article counts should not be mistaken to represent a number of grievances, since the results include all occurrences of Article and Sub-Article recorded on all tabs (up to 5) for all grievances.

**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.



## Title: Business Intelligence Grievance Articles Trend Report via Portal

- 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 Articles Trend Report”.

BI Reports

Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | **Grievance Reporting**

Grievance Details Report

Detailed Navigation

- Grievance Details Report
- Grievance Master Agreement
- Grievance Totals by Agency F
- Grievance Articles Trend Rep**
- Grievance Detail Agency Rep
- Grievance History Report

Portal Favorites

There are no items to display

Variable Entry

Available Variables: [Dropdown] Save Save

General Variables

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"/>	
Sub-Article Name 1	<input type="checkbox"/>	
Sub-Art #1	<input type="checkbox"/>	

OK Check

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

BI Reports

Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Mea

Grievance Articles Trend Report

Detailed Navigation

- Grievance Details Report
- Grievance Master Agreement
- Grievance Totals by Agency F
- Grievance Articles Trend R**
- Grievance Detail Agency Rep
- Grievance History Report

Portal Favorites

There are no items to display

Variable Entry

Available Variables: [Dropdown] Save Save As... Delete Show Variable Personalization

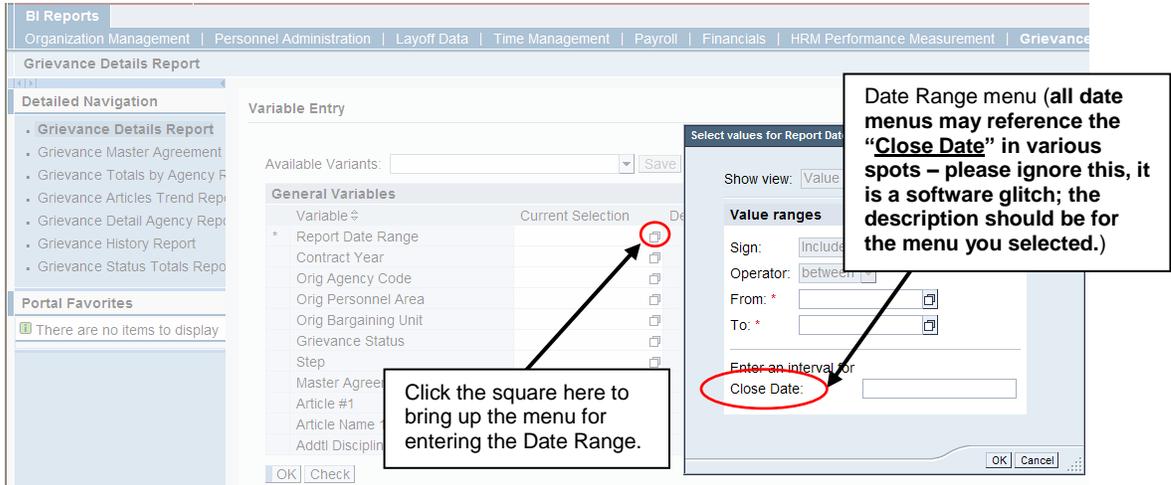
General Variables

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"/>	
Sub-Article Name 1	<input type="checkbox"/>	
Sub-Art #1	<input type="checkbox"/>	

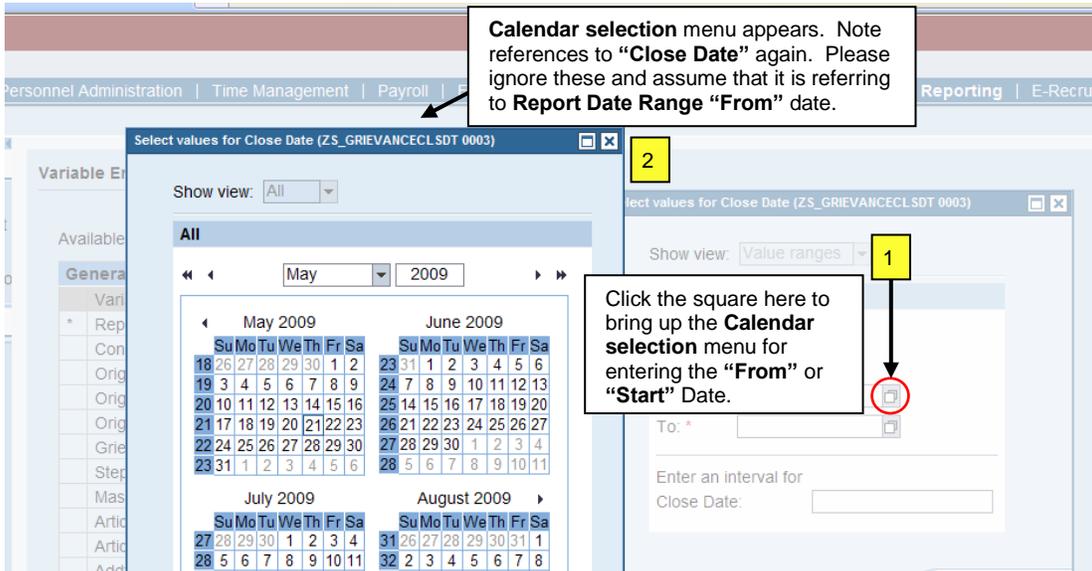
OK Check

- 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 Articles Trend Report via Portal**

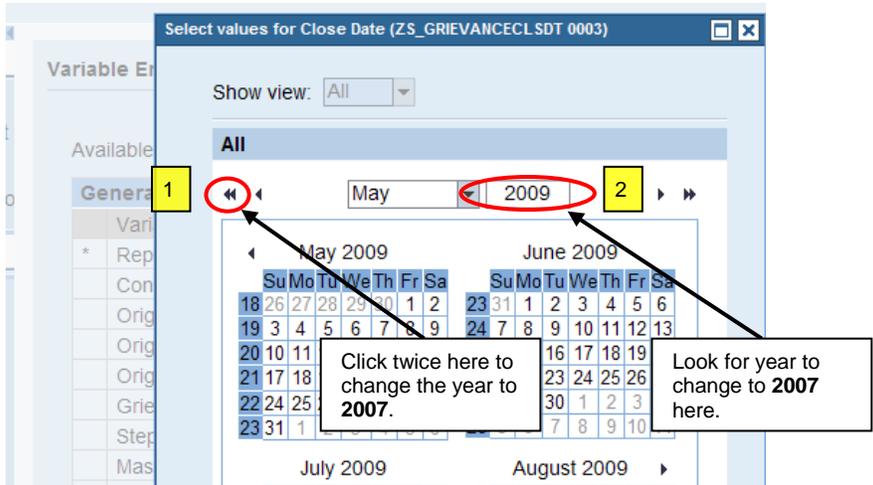


- Click on the square on the right side of the "From" box to get to the "Calendar" menu (see below).

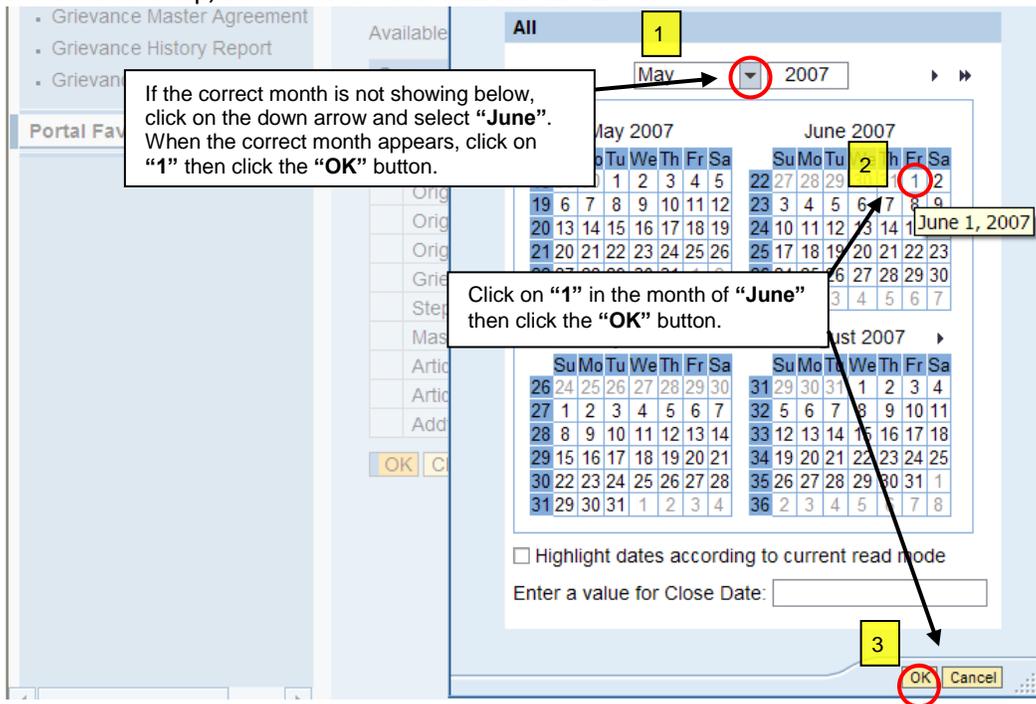


- In this example, we are going to use the "Report Date Range" of June 1, 2007 to June 15, 2007. To enter the "From" date of June 1, 2007, click twice (waiting for the screen to refresh after each click) on the double left arrow to change the year to 2007 (see below).

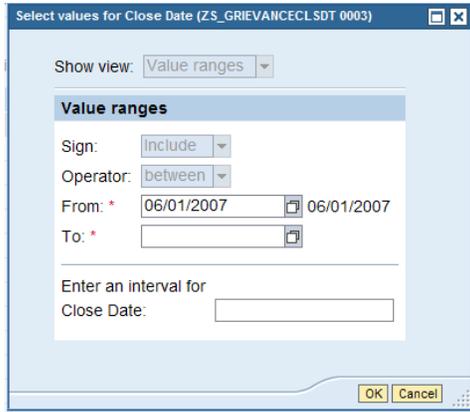
**Title: Business Intelligence Grievance Articles Trend Report via Portal**



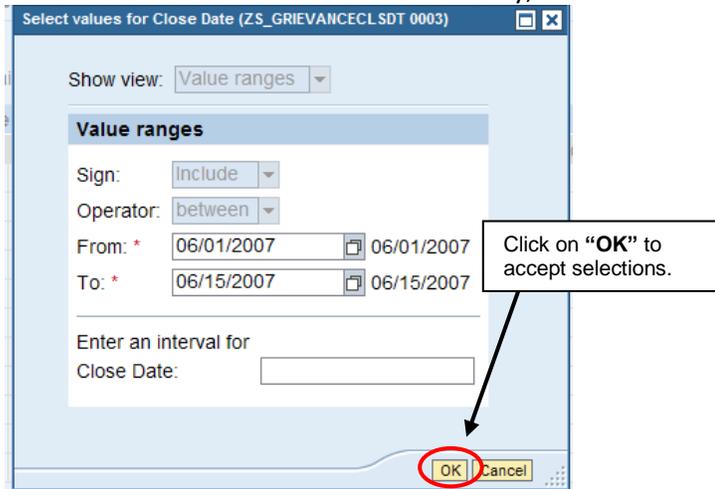
- Since the month of June is already showing as one of the four months on the menu, you can just click on "June 1st" then click the "OK" button. Otherwise you could click the down arrow for month at the top, select "June" and click on the "1st".



- 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).



10. 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.



11. 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.
12. When you are finished selecting any other criteria, click on the “OK” button to see your report.

## Title: Business Intelligence Grievance Articles Trend Report via Portal

**BI Reports**  
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance

**Grievance Articles Trend Report**

**Detailed Navigation**

- Grievance Details Report
- Grievance Master Agreement
- Grievance Totals by Agency F
- Grievance Articles Trend R**
- Grievance Detail Agency Rep
- Grievance History Report

**Portal Favorites**

There are no items to display

Click on "OK" to run report after selections are complete.

**Variable Entry**

Available Variants:  Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable ⇅	Current Selection	Description
* Report Date Range	06/01/2007 - 06/15/2007	06/01/2007 - 06/15/2007
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Sub-Article Name 1		
Sub-Art #1		

OK Check

13. The "Grievance Articles Trend 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.

**BI Reports**  
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | **Grievance Reporting**

**Grievance Articles Trend Report** | History | Back

**Detailed Navigation**

- Grievance Details Report
- Grievance Master Agreement
- Grievance Totals by Agency F
- Grievance Articles Trend R**
- Grievance Detail Agency Rep
- Grievance History Report

**Portal Favorites**

There are no items to display

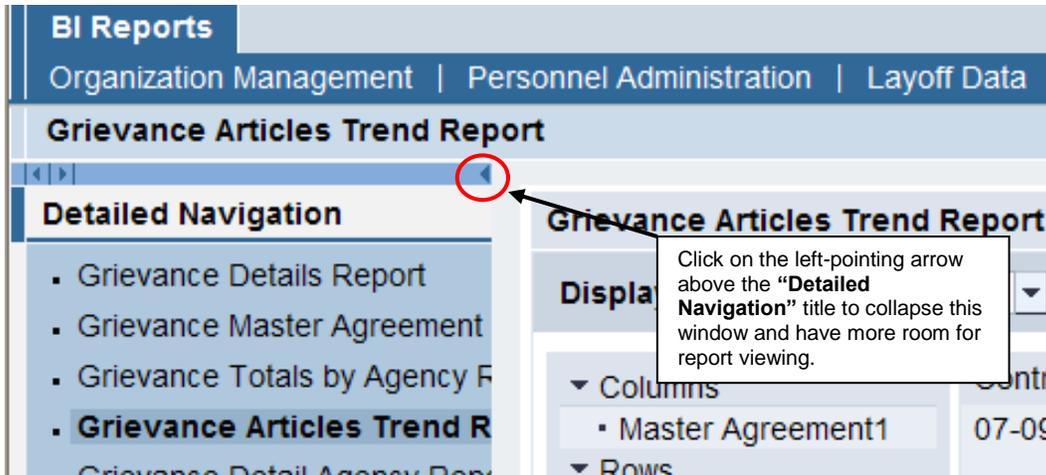
**Grievance Articles Trend Report**

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

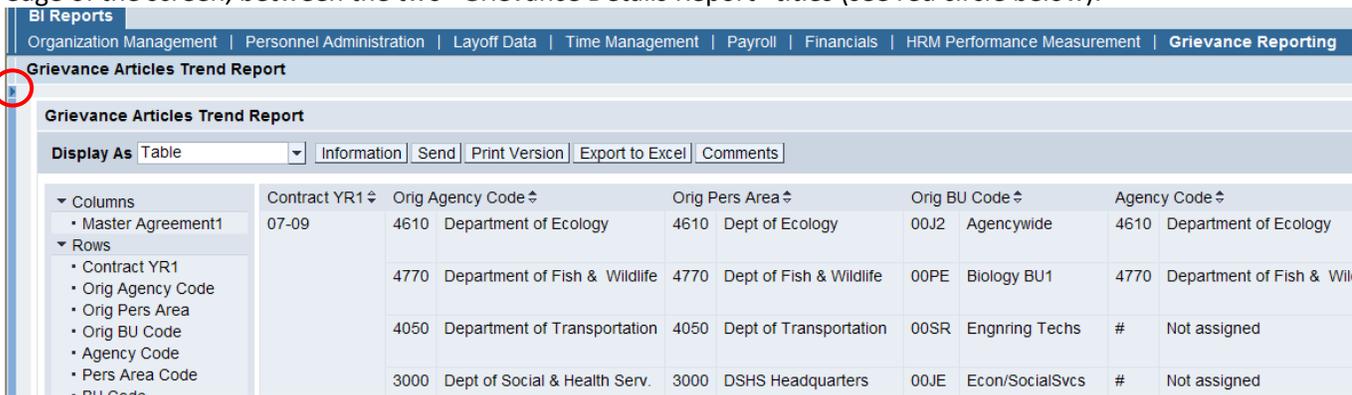
Columns	Contract YR1 ⇅	Orig Agency Code ⇅	Orig Pers Area ⇅	Orig BU Code ⇅	Agency Code ⇅
Master Agreement1	07-09	4610 Department of Ecology	4610 Dept of Ecology	00J2 Agencywide	4610 Department of Ecology
Contract YR1		4770 Department of Fish & Wildlife	4770 Dept of Fish & Wildlife	00PE Biology BU1	4770 Department of Fish
Orig Agency Code		4050 Department of Transportation	4050 Dept of Transportation	00SR Engring Techs	# Not assigned
Orig BU Code		3000 Dept of Social & Health Serv.	3000 DSHS Headquarters	00JE Econ/Social Svcs	# Not assigned
Agency Code			3025 DSHS Region 5	00JE Econ/Social Svcs	# Not assigned
Pers Area Code		4900 Dept. of Natural Resources	4900 Dept Natural Resources	00HM Residual NonSup	# Not assigned
BU Code					
Article Name1					
Sub-Article Name1					
Article Name2					
Sub-Article Name2					
Article Name3					
Sub-Article Name3					
Article Name4					
Sub-Article Name4					
Article Name5	05-07	1900 Board of Industry Ins Appeals	1900 BD of Industrial Appeals	00GS Judicial Staff	# Not assigned
Sub-Article Name5					
Key Figures					
Free characteristics					
Agency LR Contact		4950 Department of Agriculture	4950 Dept of Agriculture	00FC Frt&Veg Inspntn	4950 Department of Agric
Agency LRO/OFM Rep					
AGSO					

Result

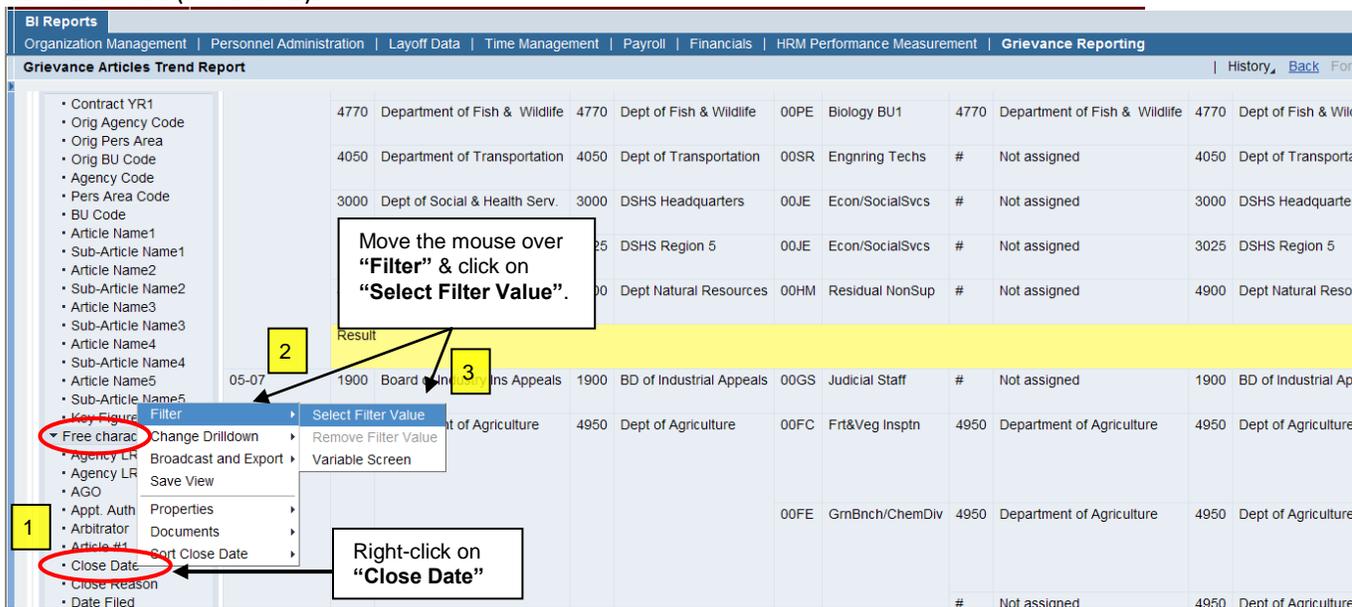
14. You can get more room for report viewing by clicking on the left-pointing arrow just above the "Detailed Navigation" title to collapse the window.



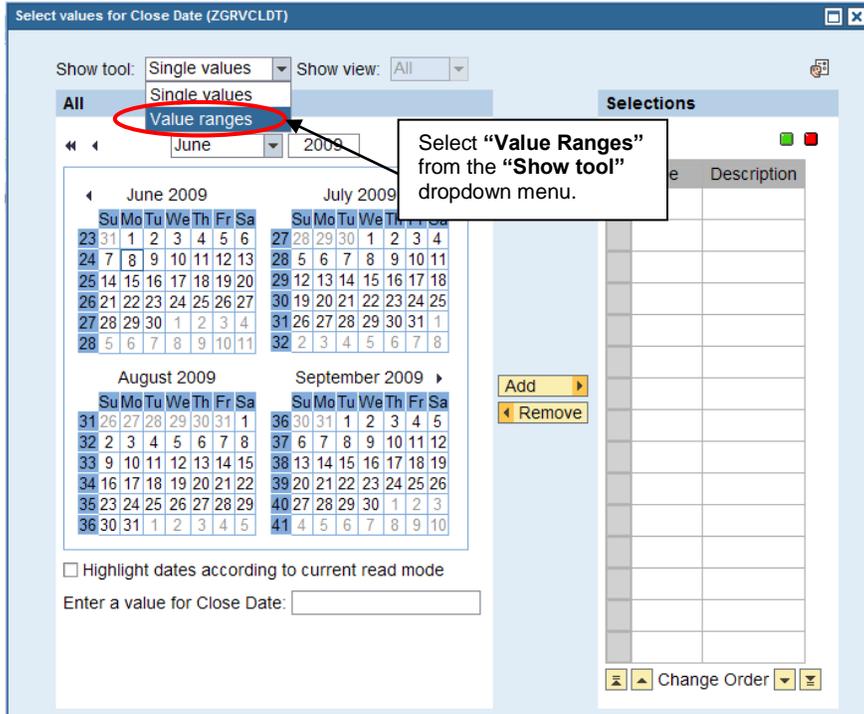
- Your screen should now appear without the "Detailed Navigation" window. You may bring back the "Detailed Navigation" window at any time by clicking on the right-pointing arrow on the left edge of the screen, between the two "Grievance Details Report" titles (see red circle below).



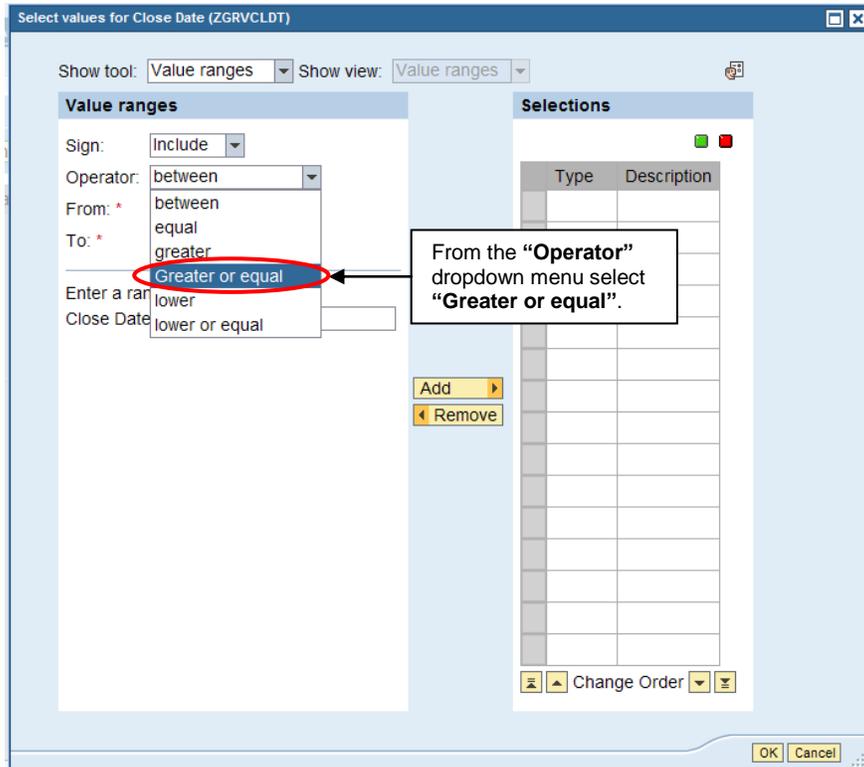
- Right-click on "Closed Date" in the "Free characteristics" area on the left side of the screen. In the popup menu, move the mouse pointer over "Filter" and click on "Select Filter Value" from the sub menu (see below).



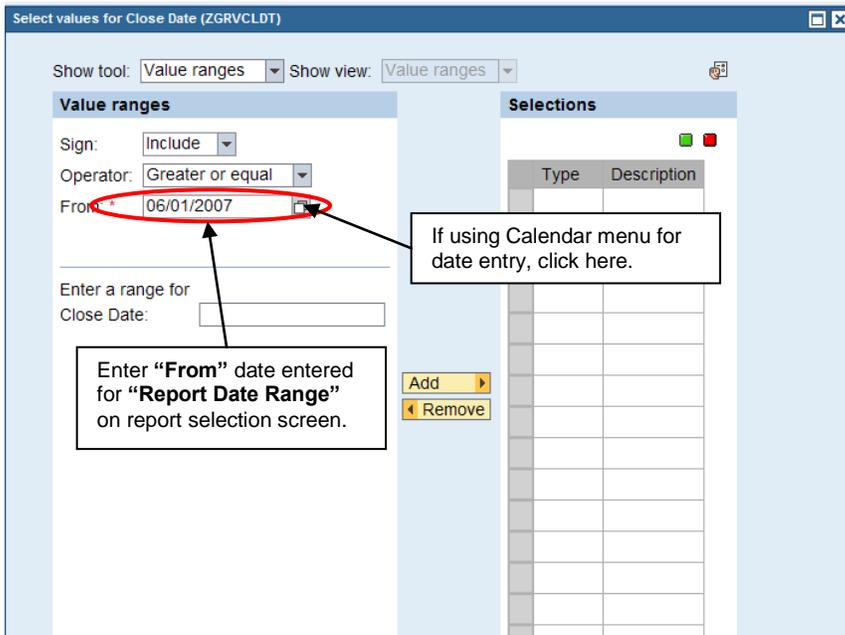
- 17. The “Closed Date” Filter menu should appear on the screen. This is the beginning of the “Close Date” filter process. You will have to apply two “Close Date” filters every time you run a Grievance report in BI to get accurate results.
- 18. Click on the “Show tool” dropdown menu and select “Value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



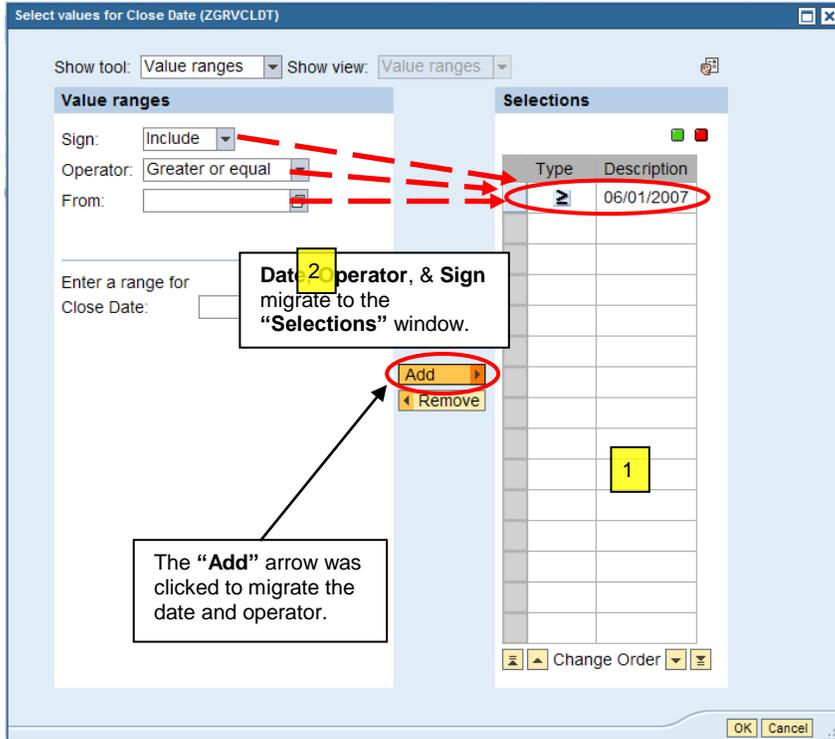
- 19. The screen should change to the one seen below. Click on the dropdown menu for “Operator” and select “Greater or equal”.



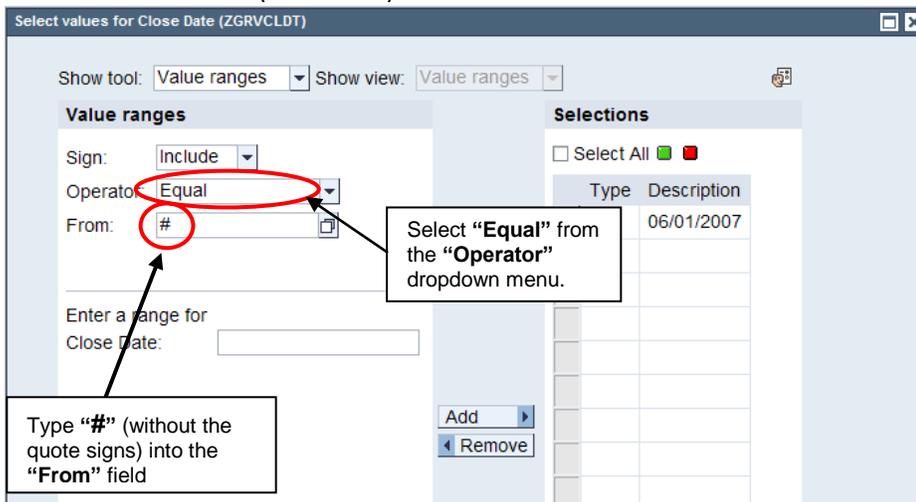
20. In the "From" field, type the date you used in the "Report Date Range" "From" field (i.e. the "Start" date of your selection range (see item 9 of these instructions)). The date may also be entered by clicking on the square at the right end of the field and selecting from the calendar menu (see item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



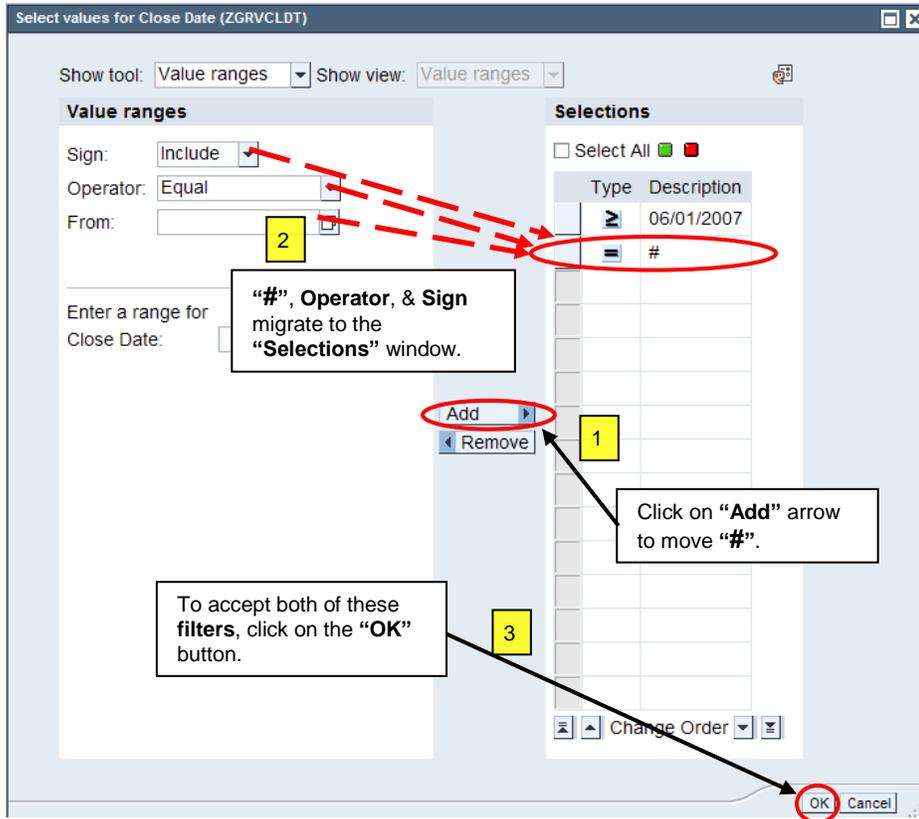
21. Now that you have selected the “Operator” and the “From” date, the filter needs to be migrated to the “Selections” window on the right side. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the date will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

# Title: Business Intelligence Grievance Articles Trend Report via Portal

BI Reports											
Organization Management   Personnel Administration   Layoff Data   Time Management   Payroll   Financials   HRM Performance Measurement   Grievance Reporting											
Grievance Articles Trend Report											
Grievance Articles Trend Report											
Display As: Table   Information   Send   Print Version   Export to Excel   Comments											
Columns	Contract YR1	Orig Agency Code	Orig Pers Area	Orig BU Code	Agency Code	Pers Area Code					
Master Agreement1	07-09	4610 Department of Ecology	4610 Dept of Ecology	00J2 Agencywide	4610 Department of Ecology	4610 Dept of Ecology					
Contract YR1		4770 Department of Fish & Wildlife	4770 Dept of Fish & Wildlife	00PE Biology BU1	4770 Department of Fish & Wildlife	4770 Dept of Fish & Wildlife					
Orig Agency Code		4050 Department of Transportation	4050 Dept of Transportation	00SR Engnrng Techs	# Not assigned	4050 Dept of Transportati					
Orig Pers Area		3000 Dept of Social & Health Serv.	3000 DSHS Headquarters	00JE Econ/Social Svcs	# Not assigned	3000 DSHS Headquarters					
Orig BU Code		4900 Dept. of Natural Resources	4900 Dept Natural Resources	00HM Residual NonSup	# Not assigned	4900 Dept Natural Resour					
Agency Code		Result									
Pers Area Code	05-07	1900 Board of Industry Ins Appeals	1900 BD of Industrial Appeals	00GS Judicial Staff	# Not assigned	1900 BD of Industrial App					
BU Code		4950 Department of Agriculture	4950 Dept of Agriculture	00FC Frt&Veg Inspn	4950 Department of Agriculture	4950 Dept of Agriculture					
Article Name1		3100 Department of Corrections	3113 Airway Heights Corr Ctr	00TA Institutions	3100 Department of Corrections	3113 Airway Heights Corr					
Sub-Article Name1											
Article Name2											
Sub-Article Name2											
Article Name3											
Sub-Article Name3											
Article Name4											
Sub-Article Name4											
Article Name5											
Sub-Article Name5											
Key Figures											
Free characteristics											
Agency LR Contact											
Agency LRO/OFM Rep											
AGO											