

**Chapter 2**

**Managing the Workload**

**Chapter Topics**

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## Accessing a Request

To give the NYSTEP user the greatest flexibility possible in pulling information from the system, several different approaches that allow the user to access a transaction have been developed – Find an Existing Transaction, Grievances Work Load Tracking, and Worklist.

### Find an Existing Transaction

Just as a User initiates a request through the menu groups at the left side of the screen, a transaction can be retrieved using the same method. Simply follow the applicable menu items through the appropriate menu groups.

### Grievances Work Load Tracking

Through **Grievances Work Load Tracking**, a user can retrieve information about submitted transactions using many criteria, individually or in combination. The criteria available will depend on the transaction type being searched, but some common fields include: **Tracking Number**, **Agency Code**, **Request Status**, **Request Date** or **Assigned Analyst**. Users can also order the way the information displays in the **Order By** fields.

### Worklist

Within NYSTEP, transactions are generally routed automatically to the next level of processing. Thus, when an operating agency sustains an Out-of-Title Work grievance, it is sent to the Worklist, or electronic “inbox”, of the appropriate C&C staff. Grievances that are denied at the agency level are not forwarded. However, if a Step 3 appeal is filed, OER will enter the appeal on NYSTEP and the system will then route the grievance to the employing agency designee and the C&C section that handles the agency. All determinations by OER, including withdrawals, are routed back to the agency and C&C.

An operating agency may withdraw a grievance only when the grievance has not progressed beyond Step 2. When an operating agency withdraws a grievance, it is not forwarded.



## Find an Existing Transaction

The simplest and most straightforward way to access a grievance is to go into the request page directly through the menu items and enter the applicable data.



### Access the Page

1. Click **Grievances, Grievances, Use, Grievances**.  
*A Search Dialog Box will display*

The screenshot shows the NYSTEP web application interface. At the top, there is a navigation bar with the NYSTEP logo and a 'Home' button. Below the navigation bar, a breadcrumb trail reads: [Home](#) > [Grievances](#) > [Grievances](#) > [Use](#) > [Grievances](#). The main heading is 'Grievances' followed by 'Find an Existing Transaction'. The search form includes the following fields and controls:

- Tracking Number:
- Agency:
- SSN:
- Name:
- Case Sensitive
- [Basic Search](#)
- [Add a New Transaction](#)

2. Enter as much data as necessary to pull up a grievance. Press **Search**.



The search can be as broad or as narrow as necessary. Entering the full **Job Control Number** will take the user directly to the requested transaction. A search can be conducted by entering criteria singly (**Agency**) or in combination (**Agency** and the first part of the **Tracking Number** or the last name of the grievant). The more information the tracking system has to define the search, the more focused the results.



## Work Load Tracking

NYSTEP includes an easy means by which a user can find the status of any transaction submitted by his or her agency.

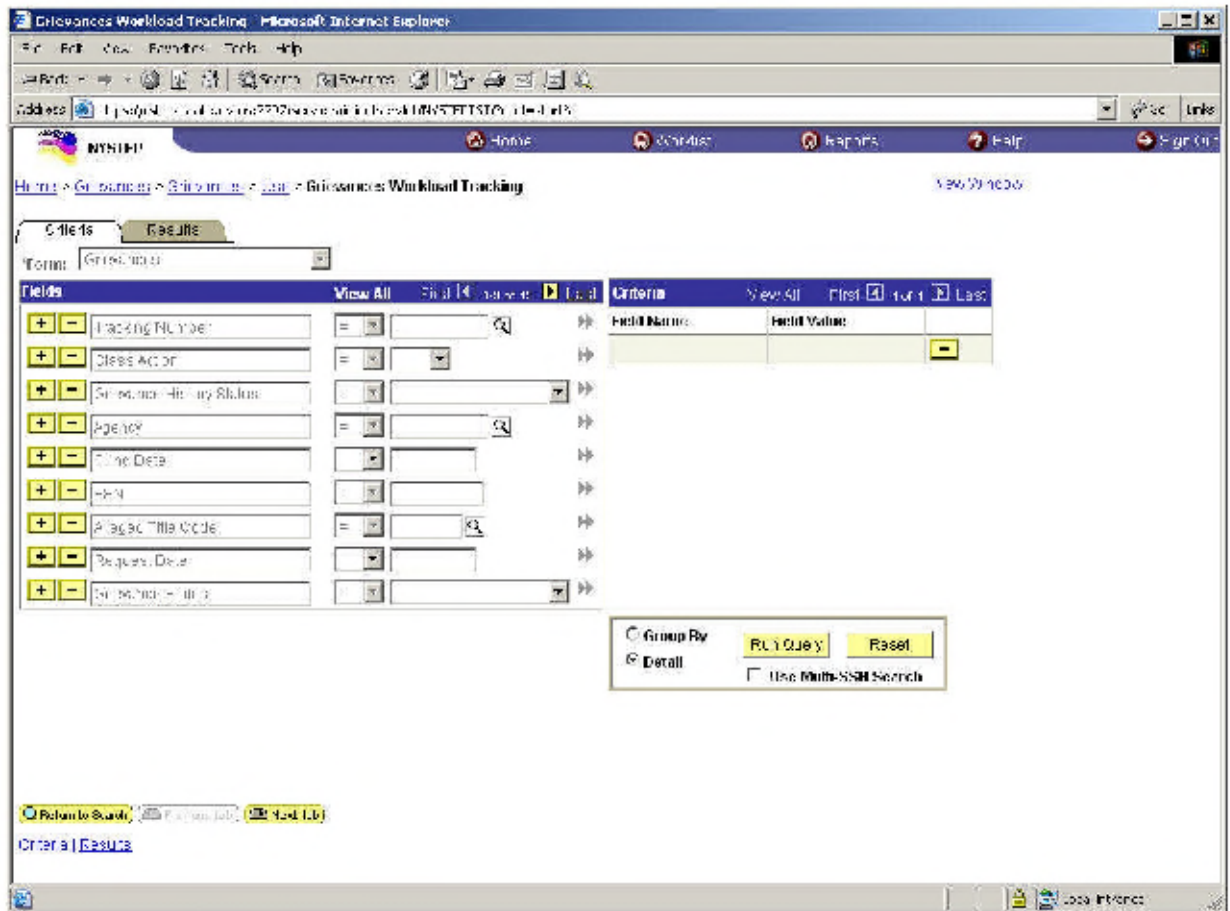
Through **Grievances Work Load Tracking**, a user can retrieve information using many criteria, individually or in combination. The criteria available will depend on the transaction type being searched, but some common fields include: **Tracking Number**, **Agency Code**, **Alleged Title Code**, **Step**, **Filing Date** or **Assigned Analyst**. These data entry fields can also order the way the information displays in the **Order By** fields.

The information is displayed in rows across the page. Clicking the hyperlink on the **Tracking #** at the beginning of the row will call the transaction up in another window.

### Access the Page

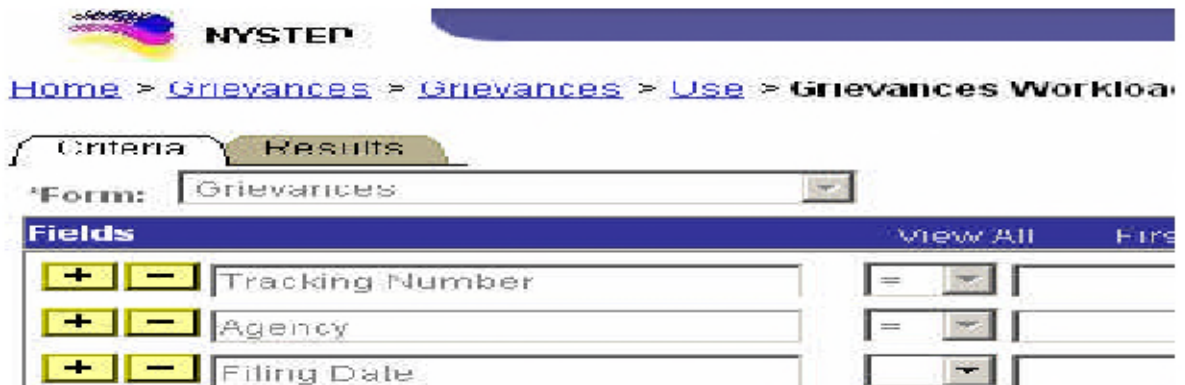


1. Click **Grievances, Grievances, Use, Grievances Work Load Tracking**.  
*A Search Dialog Box will display*



**NOTE:** Field descriptions for this page are found at the end of the Grievances Work Load Tracking section.

2. In the **Form** field, you will see **Grievances**



3. Select the **Field(s)** to search by. In the appropriate field, enter the necessary data or click and select the code(s). Press **Tab**.



**NOTE:** The criteria available depend on the transaction type being searched for. The data entry fields can also order the way the information displays in the **Order By** fields.



**NOTE:** The data search fields can be modified by adding and deleting rows. To add a row, press the button. Pressing will bring up a list of available fields that can be added.

To delete a row, press the button. A message will appear asking the user to confirm the delete. Press **OK** to delete the row. Despite the message, the row will be deleted immediately upon clicking **OK**.

4. After selecting the data search field(s), click to move that data to the **Criteria** box.



**NOTE:** The system has no information with which to search until data fields have been placed in the **Criteria** box. At least one data field must be entered to begin a search.

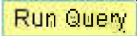


**NOTE:** The criteria fields can be modified by adding and deleting rows. To add a row, press the button in the **Fields** box. To modify a field, press the button to remove it from the criteria. It can then be modified in the **Fields** box and placed back into the search criteria.

To remove a field completely, press the button. A message will appear asking the user to confirm the delete. Press **OK** to delete the row.



Despite the message, the row will be deleted immediately upon clicking **OK**.


- To run the report, select how the report should be organized and click the **Run Query**  button. The results can be shown in one of two fashions – by **Group** or **Detail**. **Group** will break down transactions by agency code and group them together with a count of the number of transactions. **Detail** will break out the transactions by individual request.



**NOTE:** Detail Reports that contain fewer than 100 rows of information will appear at the bottom of the **Criteria** page. If there are more than 100 rows of information, a new page will appear under the **Results** tab. Results of the **Group By** sort are on the bottom of the **Criteria** page.



The results of a **Group** search will show rows of information grouped by title code, and will contain the fields **Agency, Agency Name, Title Code, Job Title, and Count**.

Results of a **Detail** search also show rows of data. To access the transaction, click on the **Tracking #** to call the request up on another page.

The results of a **Detail** search can be sorted in a variety of ways by using the **Order By** fields. Press the  and select the field by which the results should be sorted. The data can be ordered by three different fields. **Field 1** will order first, followed by **Field 2** and then **Field 3**. Click **Sort** and the data will order as specified.

- To run another report, click **Reset** and enter the information for another search.

**Criteria Page Field Descriptions**

Field	Description
<b>Form</b>	The general type of transaction being requested, (e.g., Grievances.).
<b>Fields</b>	The area in which to specify the search fields.
	Insert another row of data to search by.
	Delete a row of search data.
<b>(Data Field Name)</b>	Name of the data field.
<b>(Search Qualifier)</b>	Specifies the condition of the data (e.g. equal to, less than, etc.).

<b>Field</b>	<b>Description</b>
<b>(Data)</b>	Specific data to search for (e.g. Grievant Name, Agency 08000, etc.).
<b>▶▶ OR ◀◀</b>	Places or removes the data into the Criteria box for searching.
<b>Criteria</b>	Specifies exact data name(s)/qualifier to search for.
<b>Field Name</b>	Name of the data field being searched.
<b>Field Value</b>	Specific data being searched for and any qualifying conditions.
<b>-</b>	Deletes a row of search criterion.
<b>Group By</b>	Sorts search result data by title code.
<b>Detail</b>	Sorts search result by individual Tracking #.
<b>Run Query</b>	Runs the search.
<b>Reset</b>	Clears and resets all data fields to conduct another search.
<b>Use Multi-SSN Search</b>	When checked, displays all the named grievants entered in the system in Multi-SSN transactions.

***Results – Group By Field Descriptions***

<b>Field</b>	<b>Description</b>
<b>Agency</b>	Numeric code of the agency.
<b>Agency Name</b>	Alpha description of the agency.
<b>Title Code</b>	Title code for which the transaction is requested.
<b>Job Title</b>	Alpha description of the title.
<b>Count</b>	Number of transactions for that particular title code/description.

***Results Page Field Descriptions***

<b>Field</b>	<b>Description</b>
<b>Form</b>	The general type of transaction being requested (e.g., Grievances.).
<b>Order by</b>	Displays the search outcome as specified.
<b>Field 1</b>	Orders the displayed results by the data field chosen (e.g. Action Code, Title Code. etc.).

<b>Field</b>	<b>Description</b>
<b>Field 2</b>	Orders the displayed results by the data field chosen (e.g. Action Code, Title Code. etc.). Secondary sort order.
<b>Field 3</b>	Orders the displayed results by the data field chosen (e.g. Action Code, Title Code. etc.). Third level sort order.
<b>Sort</b>	When clicked, arranges the search results in the order specified by the <b>Order By</b> fields.
<b>Detail Results – (Description)</b>	The area in which the results of a transaction search is shown.
<b>Tracking #</b>	System generated number that designates and identifies an individual transaction request.
<b>(Data Fields)</b>	Important data fields from the transaction request.



## Using the Worklist

Within NYSTEP, transactions are typically routed automatically to the next level of processing. When an operating agency sustains a grievance, it is sent to the Worklist or electronic “inbox” of the appropriate C&C staff. When OER submits a Step 3 appeal or reconsideration request (Step 3 ½) of an agency determination, the grievance is routed to the agency and C&C.

If a union wants to withdraw a grievance that is awaiting a determination by the agency, the agency should simply withdraw the transaction. No Worklist will be generated. Once the grievance has been sustained at Step 2 or appealed to OER, the withdrawal request will be processed by OER and a Worklist will be sent to both the agency and C&C designees.



### Access the Page

1. Access the NYSTEP Home page.
2. Click  Worklist  
*A Worklist page will appear.*

NYSTEP Home Worklist Reports

Home > PeopleTools > Worklist > Use > Worklist

Worklist for User One					First	1 of 3	Last
Detail	Business Process	Activity	Worklist	Count			
1 <a href="#">Detail</a>	NY - DOB Freezes & Waivers	DOB Waiver Approval	Agency Worklist	107			
2 <a href="#">Detail</a>	OTW Grievance	Agency Reviewed	Extended OTWG Payment Ltr	4			
3 <a href="#">Detail</a>	OTW Grievance	OER Determination	Extended OTWG Payment Ltr	3			

Field 1:  Field 2:  Field 3:

Details			Find   View All	First	1 of 1	Last
Available	Sent From	WL Comments				
1						



**NOTE:** Field descriptions for this page are found at the end of the Using the Worklist section.

The **Worklist** is made up of transaction request data grouped by the **Business Process** (i.e. OTW Grievance), its **Activity** (i.e. C&C Reviewed, OER Determination), and the Worklist (i.e. Appeal/Reconsider, OER Determination).



- Determine the row the request to be worked is in. Click the **Detail** button. The individual transaction requests will appear in a **Details** box at the bottom of the page.

Home > PeopleTools > Worklist > Use > Worklist [New Window](#)

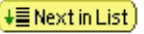


Worklist for User One					First 13 of 2 Last
	Detail	Business Process	Activity	Worklist	Count
1	<a href="#">Detail</a>	NY - DOB Freezes & Waivers	DOB Waiver Approval	Agency Worklist	107
2	<a href="#">Detail</a>	OTW Grievance	Agency Reviewed	Extended OTWG Payment Ltr	4
3	<a href="#">Detail</a>	OTW Grievance	OER Determination	Extended OTWG Payment Ltr	3


Field 1:  Field 2:  Field 3:  [Sort](#) [Save Comments](#)

Details										Find   View All First 14 of 4 Last
Mark Worked	Grv Tracking#	Filing Dt	Agency	Title Code	Grv Status	Available	Sent From	WL Comments		
1 <input checked="" type="checkbox"/>	Available <a href="#">Work It</a>	2005-02-5108	05/05/2005	01030	2501210	Agy Sustained	03/07/2005	Cockfield, Donna ID		
2 <input checked="" type="checkbox"/>	Selected <a href="#">Work It</a>	2005-03-5051	03/07/2005	33333	3016000	Reconsidered	03/08/2005	OTG One		
3 <input checked="" type="checkbox"/>	Available <a href="#">Work It</a>	2005-02-5108	05/05/2005	01030	2501210	Agy Sustained	03/09/2005	Cockfield, Donna ID		
4 <input checked="" type="checkbox"/>	Available <a href="#">Work It</a>	2005-02-5108	05/05/2005	01030	2501210	Agy Sustained	03/09/2005	Cockfield, Donna ID		


The results of a **Detail** search can be sorted in a variety of ways. Press the  at the end of the **Field (1/2/3)** data box and select the field by which the results should be sorted. The data can be ordered by three different fields. **Field 1** will order first, followed by **Field 2** and then **Field 3**. Click  and the data will order as specified.

- To work an individual transaction request, click **Work It**. The Worklist page will be replaced by the **Grievance** page.

To work another transaction without returning to the worklist, click the  OR  buttons, or click on **View All** and scroll to the appropriate sequence. To return to the worklist, click the  button.

Brief explanatory comments, limited to 30 characters, can be made in the worklist regarding a request. In the **WL Comments** data field, enter any applicable notes. To keep these comments, the  button must be clicked. Once comments are entered, they cannot be deleted, but they may be edited.

Prior to a request being selected from the Worklist, an item will be marked **Available**. After having clicked the **Work It** hyperlink, the transaction will be marked **Selected** when the Worklist is next accessed.

To clear a transaction from the worklist, highlight the row and click . This will immediately remove the request row from the Worklist.



**NOTE:** If a transaction is inadvertently marked worked and removed from a worklist, it can still be accessed using the menu items and Find an Existing Transaction. Enter the transaction information into the search dialog box.

***Worklist Field Descriptions***

<b>Field</b>	<b>Description</b>
<b>Detail</b>	When pressed, calls up all transactions with common workflow characteristics.
<b>Business Process</b>	The type of the transaction.
<b>Activity</b>	Describes where the transaction is in grievance process/NYSTEP workflow.
<b>Worklist</b>	Last action taken against the request.
<b>Count</b>	The number of transactions within each row of the worklist.
<b>Field 1</b>	Orders the displayed results by the data field chosen (e.g. Action Code, Title Code. etc.).
<b>Field 2</b>	Orders the displayed results by the data field chosen (e.g. Action Code, Title Code. etc.). Secondary sort order.
<b>Field 3</b>	Orders the displayed results by the data field chosen (e.g. Action Code, Title Code. etc.). Third level sort order.
<b>Sort</b>	When clicked, arranges the search results in the order specified by <b>Field (1/2/3)</b> .
<b>Save Comments</b>	When pressed, saves any comments entered into WL Comments.
<b>Mark Worked</b>	Deletes the transaction from the worklist.
<b>(Available/Selected)</b>	Indicates whether or not the request has been accessed.
<b>Work It</b>	Opens the request.
<b>Grv Tracking #</b>	System generated number displayed upon saving or submitting.
<b>Filing Dt</b>	Date entered as the date grievance was filed
<b>Agency</b>	Numeric code of the agency.
<b>Title Code</b>	The title code in which the grievant is serving.
<b>Grv Status</b>	The current status of the grievance; i.e. Grievance.
<b>Available</b>	Date the item became available on the worklist.

Field	Description
Sent From	Individual from whom the request was last routed.
WL Comments	Open field for brief explanatory notes.

NYSTEP Home Worklist Reports

Home > PeopleTools > Worklist > Use > Worklist

Worklist for User One					First	1-3 of 3	Last
Detail	Business Process	Activity	Worklist	Count			
1 <a href="#">Detail</a>	NY - DOB Freezes & Waivers	DOB Waiver Approval	Agency Worklist	107			
2 <a href="#">Detail</a>	OTW Grievance	Agency Reviewed	Extended OTWG Payment Ltr	4			
3 <a href="#">Detail</a>	OTW Grievance	OER Determination	Extended OTWG Payment Ltr	3			

Field 1:  Field 2:  Field 3:  [Sort](#) [Save Comments](#)

Details			Find   View All	First	1 of 1	Last
Available	Sent From	WL Comments				
1		<input type="text"/>				