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Conventions Used In This Guide

The following are the typeface conventions used throughout this guide:

**Bold** Indicates either one of the following: emphasis of a specific word or phrase specific selection from a list or option.
Example: Click on the **OK** button

Names of window screens, directories, pull-down menus, buttons and dialog boxes.
Example: select **Exit > Exit GRARB** from the Windows toolbar

> symbol Sequence in which you should select a menu option.
Example: select **Exit > Exit GRARB** from the Windows toolbar
Functional Overview
This diagram depicts the overall process for the Grievance & Arbitration System users.
Users and Roles
The functions of the system have various levels of sensitivity and are not appropriate for access by all users. All users of the system are assigned specific roles and privileges. Roles describe a user’s work responsibility and privileges determine the access to functions of the system as well as access to data based on collective bargaining units. Privileges are assigned to each role and roles are then assigned to each user. The table below describes the various types of users and roles in the use of the Grievance & Arbitration System.

<table>
<thead>
<tr>
<th>Users</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO Users</td>
<td>System Administrator Role</td>
</tr>
<tr>
<td></td>
<td>Labor Relations Role</td>
</tr>
<tr>
<td></td>
<td>Employee Relations Role</td>
</tr>
<tr>
<td></td>
<td>General Counsel Role</td>
</tr>
<tr>
<td>Campus Users</td>
<td>Staff Role</td>
</tr>
<tr>
<td></td>
<td>Staff Assistant</td>
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<tr>
<td></td>
<td>Faculty Role</td>
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<tr>
<td></td>
<td>Faculty Assistant</td>
</tr>
<tr>
<td></td>
<td>OptOut Role</td>
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<tr>
<td></td>
<td>UAW Role</td>
</tr>
<tr>
<td></td>
<td>UAW Assistant</td>
</tr>
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</table>
Chancellor’s Office Roles And Assigned Privileges
This table describes the system roles and privileges for the various Chancellor Office users.

<table>
<thead>
<tr>
<th>System Role</th>
<th>Assigned Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO User - System Administrator Role</td>
<td>List Grievances menu</td>
</tr>
<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Grievances</td>
</tr>
<tr>
<td></td>
<td>→ Add/Modify Grievances</td>
</tr>
<tr>
<td></td>
<td>→ Modify Closed Grievance Cases</td>
</tr>
<tr>
<td></td>
<td>→ Remove Grievance Level</td>
</tr>
<tr>
<td></td>
<td>→ Remove Grievance Issue</td>
</tr>
<tr>
<td></td>
<td>→ Remove Grievant</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>→ Upload Grievance Level Attachment by Campus Level Access</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>→ Upload Grievance Level Attachment by CO Level Access</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>→ Download Grievance Level Attachment by Campus Level Access</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>→ Download Grievance Level Attachment by CO Level Access</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>Maintain Arbitrations sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Arbitrations</td>
</tr>
<tr>
<td></td>
<td>→ Add/Modify Arbitrations</td>
</tr>
<tr>
<td></td>
<td>→ Remove Consolidated Cases</td>
</tr>
<tr>
<td></td>
<td>→ Upload Arbitration Attachment</td>
</tr>
<tr>
<td></td>
<td>→ Download Arbitration Attachment</td>
</tr>
<tr>
<td></td>
<td>Maintain Reference Tables sub-menu</td>
</tr>
<tr>
<td></td>
<td>Maintain Attachments sub-menu</td>
</tr>
<tr>
<td>CO User - Labor Relations Role</td>
<td>List Grievances menu</td>
</tr>
<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Grievances</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>→ Download Grievance Level Attachment by Campus Level Access</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>→ Download Grievance Level Attachment by CO Level Access</td>
</tr>
<tr>
<td>Row Level Privileges</td>
<td>Maintain Arbitrations sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Arbitrations</td>
</tr>
<tr>
<td></td>
<td>→ Add/Modify Arbitrations</td>
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<tr>
<td></td>
<td>→ Remove Consolidated Cases</td>
</tr>
<tr>
<td></td>
<td>→ Upload Arbitration Attachment</td>
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<tr>
<td></td>
<td>→ Download Arbitration Attachment</td>
</tr>
<tr>
<td></td>
<td>Maintain Reference Tables sub-menu</td>
</tr>
<tr>
<td></td>
<td>Maintain Attachments sub-menu</td>
</tr>
<tr>
<td></td>
<td>Ultra Search menu</td>
</tr>
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</table>
Chancellor’s Office Roles And Assigned Privileges (continued)

<table>
<thead>
<tr>
<th>System Role</th>
<th>Assigned Privileges</th>
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<tbody>
<tr>
<td></td>
<td>List Grievances menu</td>
</tr>
<tr>
<td>CO User - Employee Relations Role</td>
<td>Maintain Grievances sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Grievances</td>
</tr>
<tr>
<td></td>
<td>→ Add/Modify Grievance Level only</td>
</tr>
<tr>
<td></td>
<td>→ Add Grievance Issue only</td>
</tr>
<tr>
<td></td>
<td>→ Upload Grievance Level Attachment by Campus Level Access</td>
</tr>
<tr>
<td></td>
<td>→ Upload Grievance Level Attachment by Co Level Access</td>
</tr>
<tr>
<td></td>
<td>→ Download Grievance Level Attachment by Campus Level Access</td>
</tr>
<tr>
<td></td>
<td>→ Download Grievance Level Attachment by CO Level Access</td>
</tr>
<tr>
<td></td>
<td>→ Maintain Arbitrations sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Arbitrations</td>
</tr>
<tr>
<td></td>
<td>→ Download Arbitration Attachment</td>
</tr>
<tr>
<td></td>
<td>Ultra Search menu</td>
</tr>
<tr>
<td>CO User - General Counsel Role</td>
<td>List Grievances menu</td>
</tr>
<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
</tr>
<tr>
<td></td>
<td>→ Search Grievances</td>
</tr>
<tr>
<td></td>
<td>→ Download Grievance Level Attachment by Campus Level Access</td>
</tr>
<tr>
<td></td>
<td>→ Download Grievance Level Attachment by CO Level Access</td>
</tr>
<tr>
<td></td>
<td>→ Maintain Arbitrations sub-menu</td>
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<tr>
<td></td>
<td>→ Search Arbitrations</td>
</tr>
<tr>
<td></td>
<td>→ Download Arbitration Attachment</td>
</tr>
<tr>
<td></td>
<td>Ultra Search menu</td>
</tr>
</tbody>
</table>
## Campus Roles And Assigned Privileges

This table describes the system roles and assigned privileges for the various campus users.

<table>
<thead>
<tr>
<th>System Role</th>
<th>Assigned Privileges</th>
<th>CBID</th>
</tr>
</thead>
</table>
| Campus User – Staff Role | List Grievances menu  
                          | Maintain Grievances sub-menu  
                          | Search Grievances  
                          | Row Level Privileges → | Add/Modify Grievances (for CBID by Campus)  
                          | R01, R02, R04, R05, R06, R07, R08, R09, R10, CSUEU mixed unit code.  
                          | Remove Grievance Level (for CBID by Campus)  
                          | Remove Grievance Issue (for CBID by Campus)  
                          | Remove Grievant (for CBID by Campus)  
                          | Row Level Privileges → | Upload Grievance Level Attachment by Campus Level Access  
                          | Row Level Privileges → | Download Grievance Level Attachment by Campus Level Access  
                          | Row Level Privileges → | Download Grievance Level Attachment by CO Level Access  
                          | Maintain Arbitrations sub-menu  
                          | Search Arbitrations  
                          | Download Arbitration Attachment  
                          | Ultra Search menu  
                          | Active/Inactive Cases Report  
                          | Response Deadlines Report  
                          | Campus Submission sub-menu  
                          | Search Grievances by Campus (Restrict Campus by user access)  
| Campus User – Faculty Role | List Grievances menu  
                          | Maintain Grievances sub-menu  
                          | Search Grievances  
                          | Row Level Privileges → | Add/Modify Grievances (for CBID by Campus)  
                          | R03  
                          | Remove Grievance Level (for CBID by Campus)  
                          | Remove Grievance Issue (for CBID by Campus)  
                          | Remove Grievant (for CBID by Campus)  
                          | Row Level Privileges → | Upload Grievance Level Attachment by Campus Level Access  
                          | Row Level Privileges → | Download Grievance Level Attachment by Campus Level Access  
                          | Row Level Privileges → | Download Grievance Level Attachment by CO Level Access  
                          | Maintain Arbitrations sub-menu  
                          | Search Arbitrations  
                          | Download Arbitration Attachment  
                          | Ultra Search menu  
                          | Active/Inactive Cases Report  

Campus Roles And Assigned Privileges (continued)

<table>
<thead>
<tr>
<th>System Role</th>
<th>Assigned Privileges</th>
<th>CBID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Response Deadlines Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Campus Submission sub-menu</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➔ Search Grievances by Campus (Restrict Campus by user access)</td>
<td></td>
</tr>
<tr>
<td>Campus User – UAW Role</td>
<td>List Grievances menu</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➔ Search Grievances</td>
<td></td>
</tr>
<tr>
<td>Row Level Privileges ➔</td>
<td>➔ Add/Modify Grievances (for CBID by Campus)</td>
<td>R11</td>
</tr>
<tr>
<td></td>
<td>➔ Remove Grievance Level (for CBID by Campus)</td>
<td></td>
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<tr>
<td></td>
<td>➔ Remove Grievance Issue (for CBID by Campus)</td>
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<tr>
<td></td>
<td>➔ Remove Grievant (for CBID by Campus)</td>
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<tr>
<td></td>
<td>➔ Upload Grievance Level Attachment by Campus Level Access</td>
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<td></td>
<td>➔ Download Grievance Level Attachment by Campus Level Access</td>
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<td></td>
<td>➔ Download Grievance Level Attachment by CO Level Access</td>
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<td>Maintain Arbitrations sub-menu</td>
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<td></td>
<td>➔ Search Arbitrations</td>
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<td></td>
<td>➔ Download Arbitration Attachment</td>
<td></td>
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<tr>
<td>Ultra Search menu</td>
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<td></td>
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<tr>
<td>Active/Inactive Cases Report</td>
<td></td>
<td></td>
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<tr>
<td>Response Deadlines Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campus User – Staff Assistant Role</td>
<td>List Grievances menu</td>
<td></td>
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<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
<td></td>
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<tr>
<td></td>
<td>➔ Search Grievances by Campus</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➔ Search Grievances by CBID</td>
<td>R01, R02, R04, R05, R06, R07, R08, R09, R10, CSUEU mixed unit code.</td>
</tr>
<tr>
<td>Row Level Privileges ➔</td>
<td>➔ Add/Modify Grievances for CBID by Campus</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➔ Remove Grievance Level (for CBID by Campus)</td>
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<tr>
<td></td>
<td>➔ Remove Grievance Issue (for CBID by Campus)</td>
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<td></td>
<td>➔ Remove Grievant (for CBID by Campus)</td>
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<tr>
<td></td>
<td>➔ Upload Grievance Level Attachment by Campus Level Access</td>
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<td>➔ Download Grievance Level Attachment by Campus Level Access</td>
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<td></td>
<td>➔ Download Grievance Level Attachment by CO Level Access</td>
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<tr>
<td>Active/Inactive Cases Report</td>
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<td>Search Grievances by CBID</td>
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## Campus Roles And Assigned Privileges (continued)

<table>
<thead>
<tr>
<th>System Role</th>
<th>Assigned Privileges</th>
<th>CBID</th>
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<tbody>
<tr>
<td>CBID</td>
<td>Response Deadlines Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Search Grievances by Campus</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Search Grievances by CBID</td>
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</tr>
<tr>
<td><em>Campus User – Faculty Assistant Role</em></td>
<td>List Grievances menu</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
<td></td>
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<tr>
<td></td>
<td>Search Grievances by Campus</td>
<td></td>
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<tr>
<td></td>
<td>Search Grievances by CBID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add/Modify Grievances for CBID by Campus</td>
<td>R03</td>
</tr>
<tr>
<td></td>
<td>Remove Grievance Level (for CBID by Campus)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Remove Grievance Issue (for CBID by Campus)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Remove Grievant (for CBID by Campus)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Upload Grievance Level Attachment by Campus Level Access</td>
<td></td>
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<tr>
<td></td>
<td>Download Grievance Level Attachment by Campus Level Access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Active/Inactive Cases Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Search Grievances by Campus</td>
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</tr>
<tr>
<td></td>
<td>Search Grievances by CBID</td>
<td></td>
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<tr>
<td></td>
<td>Response Deadlines Report</td>
<td></td>
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<tr>
<td></td>
<td>Search Grievances by Campus</td>
<td></td>
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<tr>
<td></td>
<td>Search Grievances by CBID</td>
<td></td>
</tr>
<tr>
<td><em>Campus User – UAW Assistant Role</em></td>
<td>List Grievances menu</td>
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<tr>
<td></td>
<td>Maintain Grievances sub-menu</td>
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<tr>
<td></td>
<td>Search Grievances by Campus</td>
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<td></td>
<td>Search Grievances by CBID</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add/Modify Grievances for CBID by Campus</td>
<td>R11</td>
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<td>Remove Grievance Level (for CBID by Campus)</td>
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<tr>
<td></td>
<td>Remove Grievance Issue (for CBID by Campus)</td>
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<tr>
<td></td>
<td>Remove Grievant (for CBID by Campus)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Upload Grievance Level Attachment by Campus Level Access</td>
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<tr>
<td></td>
<td>Active/Inactive Cases Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Search Grievances by Campus</td>
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</tr>
<tr>
<td></td>
<td>Search Grievances by CBID</td>
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<tr>
<td></td>
<td>Response Deadlines Report</td>
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<td>Search Grievances by Campus</td>
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<td></td>
<td>Search Grievances by CBID</td>
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<tr>
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<td>Campus Submission sub-menu</td>
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</table>
## Campus Roles And Assigned Privileges (continued)

<table>
<thead>
<tr>
<th>System Role</th>
<th>Assigned Privileges</th>
<th>CBID</th>
</tr>
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<tbody>
<tr>
<td></td>
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<tr>
<td></td>
<td>→ Restrict Campus by user access</td>
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<td>Campus User – OptOut Role</td>
<td>File Transfer menu</td>
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<tr>
<td>Row Level Privileges →</td>
<td>Campus Submission sub-menu</td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ Upload/Download OptOut File</td>
<td></td>
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<tr>
<td></td>
<td>Campus Level Access</td>
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</tr>
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</table>
Campus Roles At The Grievance Level

The table below describes the additional security for the campus user roles at the grievance level for the grievance cases based on CBID.

<table>
<thead>
<tr>
<th>System Role</th>
<th>CBID Access</th>
<th>Grievance Level Access</th>
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</thead>
<tbody>
<tr>
<td>Campus User – Staff Role, Staff</td>
<td>R02, R05, R07, R09, CSUEU mixed unit code.</td>
<td>2, 3 (Obsolete as of 01/15/2007)</td>
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<tr>
<td>Assistant Role</td>
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<td>1, 2 (Effective as of 01/16/2007)</td>
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<td>Campus User – Staff Role, Staff</td>
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<td>2, 3</td>
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<td>Assistant Role</td>
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<tr>
<td>Campus User – Staff Role, Staff</td>
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<td>2 (Obsolete as of 11/07/2006)</td>
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<tr>
<td>Assistant Role</td>
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<td>1 (Effective as of 11/08/2006)</td>
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<td>Campus User – Staff Role, Staff</td>
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<td>Assistant Role</td>
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<td>Campus User – Faculty Role,</td>
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<tr>
<td>Faculty Assistant Role</td>
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<td>Assistant Role</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table below describes the additional security for the type of cases that can be added and or modified based on CBID.

<table>
<thead>
<tr>
<th>CBID</th>
<th>Type Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>R03, R04</td>
<td>Grievance, Policy, Complaint</td>
</tr>
<tr>
<td>R01, R02, R05, R06, R07, R08, R09, R10, R11, R12</td>
<td>Grievance, Complaint</td>
</tr>
</tbody>
</table>
Logon To The Grievance & Arbitration System
Open Internet Explorer and type in the following URL:
http://www.calstate.edu/es/intranet/applications/

The Enterprise Applications page will display. Using the scroll bar, navigate to the applications listed under Human Resources. Click on the **Grievance & Arbitration** link.

The Grievance & Arbitration page will display. Click on the **Application Logon Screen** link.
Logon To The Grievance & Arbitration System (continued)

Initial Logon
The first time this application is accessed from a desktop computer, a Java Runtime Environment (JRE) version will need to be downloaded and installed. Click on the following URL for instructions to download the applet: http://www.calstate.edu/es/java-runtime-environment.shtml. To properly install the applet, technical support may be needed to provide you with ‘administrator privileges’.

Subsequent Logons
A Logon window will open and prompt you for your Oracle User Name and Password. Enter your user name and password for the Grievance & Arbitration System. Click on the Connect button.

NOTE: The first time you log on, you will be asked to change your password. Please refer to the section titled Change Your Oracle Password for specifics.
Logon To The Grievance & Arbitration System (continued)

Successful Logon
The main screen for the Grievance & Arbitration System will display when a valid user name and password have been entered.

Unsuccessful Logon
This dialog box will display when an invalid user name and/or password have been entered. Click on the OK button and re-enter your user name and password. Please send an email to arb_support@calstate.edu should you need assistance.
To Close And Logoff
To logoff the system, select Exit > Exit GRARB from the Windows toolbar.

The Logon Window will display. Click on the Cancel button > click on the ‘X’ icon in the upper right hand corner of your screen to close your browser.
Change Your Oracle Password

Enter your user name and password. Click on the Change Password icon.

The password change dialog box will display. Enter your current password > a new password. Re-enter the new password to confirm your entry.

The password must adhere to the following requirements:
• Must be different from the old password by at least 3 characters
• Must contain at least three (3) out of the four (4) following character types:
  – At least one uppercase alphabetic character (A-Z)
  – At least one lowercase alphabetic character (a-z)
  – At least one special character. The special character should be an underscore '_'
  – At least one number (0-9)

Click on the Change Password
The Grievance & Arbitration Main Screen

The system functions selected from this screen are based on the roles and privileges assigned to each user. Based on your privileges, you may have access to:

- **List Grievances**
  A summary of the cases based on a set of user defined search criteria

- **Maintenance**
  Online maintenance of grievance and arbitration related data

- **Ultra Search**
  Displays the arbitration documents/awards based on a set of search criteria

- **System Administration**
  Online maintenance of all reference related data

- **Reports**
  Pre-defined reports based on a set of user defined search criteria

- **File Transfers**
  Transfer the monthly UAW Opt Out report from the campus to the Chancellor’s Office

- **Contract Info.**
  Displays the contract documents based on a set of user defined search criteria
About These Icons
These icons are used to perform specific tasks within the screen. Each task associated with the icon is described below. It is important to understand the use of these icons so that you can navigate the screens.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves your changes. Used whenever you Add, Delete or Update a record.</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Searches the database for all records that fulfill the search criteria. Enter the search criterion in the field you want to search.</td>
</tr>
<tr>
<td><img src="image" alt="Insert New Record" /></td>
<td>Inserts a blank record after the record where the cursor is positioned.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>Deletes the record or data field.</td>
</tr>
<tr>
<td><img src="image" alt="Clear Current Record" /></td>
<td>Clears the screen of all values except the search parameter(s).</td>
</tr>
<tr>
<td><img src="image" alt="Clear Form" /></td>
<td>Clears the screen of all values.</td>
</tr>
<tr>
<td><img src="image" alt="Show editor" /></td>
<td>Show editor invokes the editor associated with the current text item in the form</td>
</tr>
</tbody>
</table>
Selecting A Value From The Dropdown Box
Dropdown boxes are used for single or multiple-choice selections in a screen.

1. To display a list of the valid values from the dropdown box, click on the downward arrow to the right of the data field.
2. Use the scroll bar to page forward or backward > select a value from the list > click on the OK button.
3. Click on the Search icon.
Selecting A Value From The Dropdown Box

Find Mode

The Find Mode queries the table for all records that fulfill the search criteria as specified.

1. Click in front of the % symbol and enter a value in the Find box.
2. Click the Find button. All values matching the search criteria are displayed.
3. Select a value > click on the OK button.
4. Click on the Search icon.

<table>
<thead>
<tr>
<th>Campus Name</th>
<th>Find Mode Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sacramento</td>
<td>60</td>
</tr>
<tr>
<td>San Bernardino</td>
<td>63</td>
</tr>
<tr>
<td>San Diego</td>
<td>65</td>
</tr>
<tr>
<td>San Francisco</td>
<td>75</td>
</tr>
</tbody>
</table>

The percent symbol is used as a wildcard for performing a search. In the example, the search is performed for any campus name that starts with a ‘S’.
1. Select **List Grievances** from the main menu.

2. The **List Grievances** screen will display. Select your search parameter(s). At least 1 search parameter must be specified. Multiple search parameters will refine the search. NOTE: To search for multiple 'Issue ID's', enter the ID's separated by a comma, e.g., 10, 11, 13.

3. Click on the **Search** icon.

4. All records that match the search criteria will display.

5. To clear any entries on the form, click on the **Clear Form** icon.
Grievance Display Detail Grievance Information

1. Search for a grievance based on your search criteria (see section titled 'Search For A Grievance').

2. The system returns all records that match the search criteria. Double click on the Case ID to select and display the detail information.

3. Information related to the case selected will display.
Add A New Grievance

1. Select **Maintenance > Maintain Grievances** from the main menu.

2. Enter the Grievance Case Details, Grievance Levels, and Grievant. The following data fields must be entered: Campus, CBID, Calendar Year, Issue ID, and Grievant Name. The Chancellor’s Office will fill out the CO Manager’s Last Name field after the grievance has been filed.

3. Click on the **Save** icon.

4. Once the grievance has been added, an email will automatically be sent to the Union Representative associated with the selected bargaining unit and the Chancellor’s Office Human Resources Labor Relations department.
Update A Grievance

1. Select **Maintenance > Maintain Grievances** from the main menu.

2. Select the **Case ID** and click on the **Search** icon.

3. Update the data fields where necessary. The updateable fields are highlighted.

4. Click on the **Save** icon.

5. A message will display when the updates have been successfully saved. Click on the **OK** button. **NOTE:** Upon closing a grievance case, an email will automatically be sent to the Union Representative associated with the selected bargaining unit, the campus user, and the Chancellor's Office Human Resources Labor Relations department.
Upload A Grievance Level Attachment

1. Select Maintenance > Maintain Grievances from the main menu.

2. Select the Case ID > click on the Search icon.

3. Click on the Paperclip icon.
Upload A Grievance Level Attachment (continued)

4. The Attachment box will display. In the Upload Attachment area of the Attachment box click on the **Path Name** icon.

5. Select the path and file you want to attach.

6. Enter a Title for the attachment using the standard naming convention > Click on the **Save** button. NOTE: Naming convention is Case ID + Level + F (filing) or R (response). For example: R04-2006-108 L2R.

7. Click on the **Cancel** button to exit.

8. Double click the attachment to view the file.
Download A Grievance Level Attachment To A Specific Folder

1. Select **Maintenance > Maintain Grievances** from the main menu.

2. Select the **Case ID** > click on the **Search** icon.

3. If the grievance level consists of attachments, the Attachment box is checked. Click on the **Paperclip** icon.

4. The Attachment box will display. Select the attachment from the list > Click on the **Path Name** icon. Double click the attachment to view the file.

5. Enter the File Name with proper extension > select the Path Name. Click on the **Save** button to save the file name.

6. Click on the **Save** button to save and display your attachment. Close your attachment.

7. Click on the **Cancel** button to close the window.
Download A Grievance Level Attachment To Your Computer Desktop

1. Select **Maintenance > Maintain Grievances** from the main menu.

2. Select the **Case ID** > click on the **Search** icon.

3. If the grievance level consists of attachments, the Attachment box is checked. Click on the **Paperclip** icon.

4. The Attachment box will display. Select the attachment title from the list. The name of the file will display in the **Save As File Name** box.

5. Either click the **Open** box to save and display your attachment, or double click the attachment to view only without saving it to your desktop. Close your attachment.

6. Click on the **Cancel** button to close this window.
Remove Issue ID, Level ID, or Grievant

1. Select Maintenance > Maintain Grievances from the main menu.
2. Select the Case ID and click on the Search icon.
3. Select Issue ID, Level ID, or Grievant to be deleted. These fields are highlighted.
4. Click on the Delete icon.
5. A message will display to confirm the data field to be deleted. Click on the Yes button to confirm.
6. A message will display when the updates have been successfully saved. Click on the OK button.
View And Print A Grievance Log

1. Select **Maintenance > Maintain Grievances** from the main menu.

2. Select the **Case ID** > click on the **Search** icon.

3. Once a Case ID has been selected, click the **PDF** icon to view the Grievance log. The Grievance log will be displayed.

4. To print the Grievance log, click on **File** from the Windows toolbar > **Print**.

5. Select your printer then click on the **OK** button.
Arbitrations
Search For An Arbitration

1. Select **Maintenance > Maintain Arbitrations** from the main menu.

2. Select a **Case ID** or enter a **Legacy Key** > click on the **Search** icon.

3. Double click to select a case from the Consolidated Case List. A message will display to inform you the field is protected against update > click on the **OK** button. The detail case information is displayed.

Step 1

Step 2

Step 3

Double click, to select a case from the Consolidated Case list.

If the Case ID is a Lead Case, the Lead Case box is checked.

The Umpire check box is displayed when CBID is R03 and Issue ID is 12 or any variation of 12 (e.g., 12.1, 12.2). When checked, this box identifies the arbitrator as also being the umpire.
Arbitrations
Add A New Arbitration

1. Select Maintenance > Maintain Arbitrations from the main menu.

2. Select a Case ID or enter a Legacy Key > click on the Search icon.

3. Enter the Arbitration Details and/or Consolidated Case ID's. Click on the Save icon.

4. A message will display when the updates have been successfully saved. Click on the OK button.
Update An Arbitration

1. Select `Maintenance > Maintain Arbitrations` from the main menu.

2. Select a `Case ID` > click on the `Search` icon.

3. Update the data fields where necessary. The updateable fields are highlighted.

4. Click on the `Save` icon.

5. A message will display when the updates have been successfully saved. Click on the `OK` button.
Upload An Arbitration Attachment

1. Select **Maintenance > Maintain Arbitrations** from the main menu.

2. Select a **Case ID** or enter a **Legacy Key** > click on the **Search** icon.

3. Click on the **Paperclip** icon.
Upload An Arbitration Attachment (continued)

4. The Attachment box will display. In the Upload Attachment area of the Attachment box click on the **Path Name** icon.

5. Select the path and file you want to attach.

6. Enter a Title for the attachment using the standard naming convention > click on the **Save** button. NOTE: Naming convention is Case ID + Case Name + type of hearing. For example: ‘R03-2006-210 Jones arbitrability’.

7. Click on the **Cancel** button to exit.
Download An Arbitration Attachment To A Specific Folder

1. Select Maintenance > Maintain Arbitrations from the main menu.

2. Select a Case ID or enter a Legacy Key > click on the Search icon.

3. If the arbitration consists of attachments, the Attachment box is checked. Click on the Paperclip icon.
Download An Arbitration Attachment To A Specific Folder (continued)

4. The Attachment box will display. Select the attachment from the list > click on the Path Name icon.

5. Enter the File Name with the proper extension > select the Path Name. Click on the Save button to save the file name.

6. Click on the Open button save and display your attachment, or double click to view the file. Close your attachment.

7. Click on the Cancel button to close the window.
Download An Arbitration Attachment To Your Computer Desktop

1. Select **Maintenance > Maintain Arbitrations** from the main menu.

2. Select a **Case ID** or enter a **Legacy Key** > click on the **Search** icon 📦.

3. The Attachment check box is checked if attachments are available. Click on the **Paperclip** icon 📁.

4. The Attachment box will display. Select the attachment from the list. The name of the file will display in the **Save As File Name** box.

5. Click on the **Open** box to save and display your attachment. Close your attachment.

6. Click on the **Cancel** button to close this window.
Remove A Consolidated Case For The Arbitration

1. Select **Maintenance > Maintain Arbitrations** from the main menu.

2. Select a **Case ID** or enter a **Legacy Key**

3. Click on the **Search** icon.

4. Select a case from the list of consolidated cases > click on the **Delete** icon.

5. A message will display to confirm the data field to be deleted. Click on the **Yes** button to confirm.

6. A message will display when the updates have been successfully saved. Click on the **OK** button.
Search For Arbitration Documents by Keyword

1. Select **Ultra Search** from the main menu.

2. Enter a value in the keyword search. Multiple keywords can be entered separated by a comma. Various types of searches that can be performed such as:
   - **Exact Match**
     Search for documents that match the terms within the quotation mark. Example: “Union” or “Place of hearing”.
   - **Word Positioning**
     Search for documents that contain the terms next to each other, or within close proximity to each other. Example: “California NEAR Faculty” will order results according to how close California is to Faculty.
Search For Arbitration Documents by Keyword (continued)

- **Boolean Combinations**
  Search for documents that match the term specified the using Boolean logic. Boolean logic consists of the following three logical operators:

<table>
<thead>
<tr>
<th>Boolean Logic</th>
<th>Example</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR</td>
<td>California OR Texas</td>
<td>Retrieves documents where one of the term or both terms are present.</td>
</tr>
<tr>
<td>AND</td>
<td>California AND Texas</td>
<td>Retrieves documents where both terms are present.</td>
</tr>
<tr>
<td>NOT</td>
<td>California NOT Texas</td>
<td>Retrieves documents where ONLY one of the terms is present.</td>
</tr>
</tbody>
</table>

3. Click on the **Search** icon 🕵️‍♂️.

4. Double click on the title to display the document for viewing.
5. Click on **File** from the Windows toolbar > select a function to send, print, or save the document.
Reports
A set of predefined reports have been created which will allow you to quickly retrieve information from the database based on your search criteria. These reports are available based on your user role and includes:

- Active/Inactive Cases Report
- Arbitration Decisions Report
- Response Deadlines Report
- Statutory Grievance Cases Report
- Permanent Umpire Arbitration Cases Report
- Scheduling ART 12 Umpire Arbitration Cases Report
- Bi-Monthly Scheduled Arbitrations Report
- Active Grievance Count
1. Select **Reports > Active/Inactive Cases Report** from the main menu. The Active/Inactive Cases screen will display for you to select at least one parameter from the Search Parameters area.

2. A detail and summary version of this report is available for you to display online and/or download to your computer. To display the report, click on the **View Detailed Report** button or the **View Summary Report** button. To download the report directly to your computer, click on the **Download Detailed Report** button or the **Download Summary Report** button.
Reports
Active/Inactive Cases (continued)

Sample - Detailed Report

Sample - Summary Report
1. Select **Reports > Arbitration Decisions Report** from the main menu. The Arbitration Decisions Report screen will display for you to select a value for each search parameter.

2. Click on the **View Report** button.

3. The Arbitration Decisions Report will display based on the set of search criteria.
Sample Report

<table>
<thead>
<tr>
<th>CBID</th>
<th>Case ID</th>
<th>Legacy Key</th>
<th>Campus</th>
<th>Arbitrator</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Award Status</th>
<th>Arb. Date</th>
<th>Decision Date</th>
<th>Issue ID(s)</th>
<th>Grievant</th>
<th>Case Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CBID</th>
<th>Case ID</th>
<th>Legacy Key</th>
<th>Campus</th>
<th>Arbitrator</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reports
Response Deadlines Report

1. Select Reports > Response Deadlines Report from the main menu. The Response Deadlines Report screen will display for you to select at least one parameter from the Search Parameters area.

2. Click on the View Report button to display the report.

3. The report will display. To save the report, select File > Save As from the Windows toolbar. The dialog box will display for you to select a Windows folder to receive the file.
Reports
Response Deadlines Report (continued)

Sample Report

![Labor Relations Grievance & Arbitration System Response Deadlines Report]

<table>
<thead>
<tr>
<th>Level ID</th>
<th>Filing Date</th>
<th>Meeting Date</th>
<th>Comments</th>
<th>Response Deadline Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01/14/2011</td>
<td>02/18/2011</td>
<td>INFORMAL</td>
<td>03/18/2011</td>
</tr>
</tbody>
</table>
1. Select **Reports > Statutory Grievance Cases Report** from the main menu. The Statutory Grievance Cases Report screen will display for you to select the search parameters.

2. Click on the **View Report** button to display the report.

3. The report will display. To save the report, select **File > Save As** from the Windows toolbar. A dialog box will display for you to select a Windows folder to receive the file.

4. To down the report in Excel format, click on the **Download Report (as excel)** button.
Sample Report

<table>
<thead>
<tr>
<th>Case ID</th>
<th>Grievant</th>
<th>Issues</th>
<th>President's Decision</th>
<th>Pres. Decision Date</th>
</tr>
</thead>
</table>
Reports
Permanent Umpire Arbitration Cases Report

1. Select Reports > Permanent Umpire Cases Report from the main menu. The Permanent Umpire Arbitration Cases Report screen will display for you to select the search parameters.

2. Click on the View Report button to display the report.

3. The report will display. To save the report, select File > Save As from the Windows toolbar. A dialog box will display for you to select a Windows folder to receive the file.

4. To download the report in Excel format, click on the Download Report (as excel) button.
Reports
Permanent Umpire Arbitration Cases Report (continued)

Sample Report

<table>
<thead>
<tr>
<th>Case ID</th>
<th>Grievant</th>
<th>Issues</th>
<th>Pres. Decision</th>
<th>Pres. Decision Date</th>
<th>Grievance Type</th>
<th>Decision Date</th>
<th>Award Status</th>
</tr>
</thead>
</table>
Reports
Scheduling Art 12 Umpire Arbitration Cases Report

1. Select **Reports > Scheduling Art 12 Umpire Arbitration Cases Report** from the main menu. The Scheduling Art 12 Umpire Arb Cases Report screen will display for you to select the search parameters.

2. Click on the **View Report** button to display the report.

3. The report will display. To save the report, select **File > Save As** from the Windows toolbar. A dialog box will display for you to select a Windows folder to receive the file.
Reports
Scheduling Art 12 Umpire Arbitration Cases Report (continued)

Sample Report

<table>
<thead>
<tr>
<th>Campus :</th>
<th>Bakersfield</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>Legacy Key</td>
</tr>
<tr>
<td>R03-2007-007</td>
<td>JENNY</td>
</tr>
</tbody>
</table>
Contract Search

1. Select **Contract Info.** from the main menu.

2. Select by CBID or enter a value in the keyword search. Multiple keywords can be entered separated by a comma. The default is faculty ‘R03’.

3. Click on the **Search** icon.

4. Contract documents that match the search criteria will display. Double click on the title to display the document for viewing.

5. The contract will display.
Monthly Opt Out Report
Opt Out Processing Procedures

The step-by-step procedure for the Opt Out Report is as follows:

1. On the first workday of each month (after 10:00 am), download the CIRS Report A30 or A32. Refer to section titled Reporting Requirements for specifics.

2. Format your report according to the format requirements for A30 or A32. Refer to section titled Data Description for A30 Report or Data Description for A32 Report.

3. Open Internet Explorer and type in the following URL: https://zeta.calstate.edu:8250/webdoc/grarb.html

4. Logon using your account assigned to you for the Grievance and Arbitration System. Refer to section titled Logon To The Grievance & Arbitration System.

5. Transfer your file to the Chancellor's Office. Refer to section titled To Transfer Your File To The CO.

6. Verify that your file was successfully transferred. Refer to section titled To View or Delete An Uploaded File.

7. Logoff the system. Refer to section titled To Close And Logoff.
Monthly Opt Out Report
Reporting Requirements
In compliance with the current MOU, campuses are being asked to supply Systemwide Labor Relations with 2 directory listings of all R11 employees who have NOT opted out from disclosure. To assist with this, two Compendium Reports are available on CIRS. Please follow the instructions below for each report.

R11 Active or On-Leave Employees (A30)
Provides UAW with a directory listing of all employees who are active or on-leave as of the end of the reporting month.

- Download CIRS report code A30, which should be available on the first workday of each month after 10:00 am. The cycles designate the reporting month. For instance, the data available on April 3rd reflecting the reporting month of March will have a cycle of 0603.
- Import the downloaded file into Excel as a tab delimited file starting the import on row 3 so the following heading lines are skipped:
  *** R11 EMPLOYEE DIRECTORY
  *** DATA AS OF mm/dd/yy *** PROGRAM=PDC2400 – TAB DELIMITED FILE
- Retain the column headings
- Remove employees who have opted out from disclosure of their directory information (including any duplication of names). The CIRS report is sorted by last name. An employee may be listed more than once due to the employee having more than one position. The entire row(s) of the employee’s data must be removed.
- REMOVE COLUMN B, SSA, FROM THE FILE. Although disclosure of confidential information is not an issue with the “file transfer” process, uniformity is helpful to Systemwide HR when compiling individual campus reports into one systemwide report.

R11 Employees Who Received Payment(s) During The Current Business Month (A32)
Provides UAW with a directory listing of all employees who were issued regular pay for any pay period during the closing business month.

- Download CIRS report code A32, which should be available on the first workday of each month after 10:00 am. The cycles designate the reporting month. For instance, the data available on April 3rd reflecting the reporting month of March will have a cycle of 0603.
- Import the downloaded file into Excel as a tab delimited file starting the import on row 3 so the following heading lines are skipped:
  *** R11 EMPLOYEE DIRECTORY
  *** DATA AS OF mm/dd/yy *** PROGRAM=PDC2401 – TAB DELIMITED FILE
- Retain the column headings
- Remove employees who have opted out from disclosure of their directory information (including any duplication of names). The CIRS report is sorted by last name. An employee may be listed more than once due to the employee having more than one payment. The entire row(s) of the employee’s data must be removed.
- REMOVE COLUMN B, SSA, FROM THE FILE. Although disclosure of confidential information is not an issue with the “file transfer” process, uniformity is helpful to Systemwide HR when compiling individual campus reports into one systemwide report.
Monthly Opt Out Report
CIRS Reporting Requirements

Due Date
Per the MOU, the systemwide list is due to UAW the last day of the first full week of every month. CSU and UAW agree that report deadlines will be extended to the following Friday when a holiday occurs in the 1st full week of any month.

To accommodate this schedule, each campus must upload both CIRS files to Systemwide Grievance and Arbitration Database at least two (2) days before the due date. Please forward both reports to Systemwide HR each month whether or not you had any employees who opted out.

CIRS Access
It is the responsibility of each campus to determine who has access to CIRS and is able to download the reports. If your department does not have a CIRS user, you may want to inquire at Human Resources or the payroll department.

Contacts
➢ Questions on this data request can be directed to Ruth Hirai at (562) 951-4409.
➢ Questions on downloading the CIRS reports can be directed to CIRS Hotline at (916) 323-5694.
### Monthly Opt Out Report

**CIRS Reporting Requirements**

**Data Description for A30 Report**

PLEASE KEEP REPORT COLUMNS IN THE SAME ORDER AS IN CIRS. THIS WILL AID SYSTEMWIDE HR WHEN COMPILING SEPARATE CAMPUS DATA INTO COLLECTIVE SYSTEMWIDE DATA.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Excel Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Code</td>
<td>A</td>
<td>The two character code representing the campus</td>
</tr>
<tr>
<td>SSA</td>
<td>B</td>
<td>Social Security Number (beginning with 0604 cycle)</td>
</tr>
<tr>
<td>Last Name</td>
<td>C</td>
<td>Employee’s last name (sorted by)</td>
</tr>
<tr>
<td>First Name</td>
<td>D</td>
<td>Employees’ first name and middle initial</td>
</tr>
<tr>
<td>Class Code</td>
<td>E</td>
<td>Code that identifies the job classification as shown in the CSU Salary Schedule</td>
</tr>
<tr>
<td>Class Title</td>
<td>F</td>
<td>This represents the abbreviated class title</td>
</tr>
<tr>
<td>CBID</td>
<td>G</td>
<td>Collective Bargaining Identifier. Represents the unit to which the employee belongs</td>
</tr>
<tr>
<td>Campus</td>
<td>H</td>
<td>Campus name</td>
</tr>
<tr>
<td>Department Code</td>
<td>I</td>
<td>The code of the department to which an employee has been assigned on PIMS</td>
</tr>
<tr>
<td>Department Name</td>
<td>J</td>
<td>The name of the department to which an employee has been assigned on PIMS</td>
</tr>
<tr>
<td>Address 1</td>
<td>K</td>
<td>The employee’s home address (street address)</td>
</tr>
<tr>
<td>Address 2</td>
<td>L</td>
<td>The employee’s home address (city, state, zip)</td>
</tr>
</tbody>
</table>

### Data Description for A32 Report

PLEASE KEEP REPORT COLUMNS IN THE SAME ORDER AS IN CIRS. THIS WILL AID SYSTEMWIDE HR WHEN COMPILING SEPARATE CAMPUS DATA INTO COLLECTIVE SYSTEMWIDE DATA.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Excel Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Code</td>
<td>A</td>
<td>The two character code representing the campus</td>
</tr>
<tr>
<td>SSA</td>
<td>B</td>
<td>Social Security Number (beginning with 0604 cycle)</td>
</tr>
<tr>
<td>Last Name</td>
<td>C</td>
<td>Employee’s last name (sorted by)</td>
</tr>
<tr>
<td>First Name</td>
<td>D</td>
<td>Employees’ first name and middle initial</td>
</tr>
<tr>
<td>Class Code</td>
<td>E</td>
<td>Code that identifies the job classification as shown in the CSU Salary Schedule</td>
</tr>
<tr>
<td>Campus</td>
<td>F</td>
<td>Campus name</td>
</tr>
</tbody>
</table>
Monthly Opt Out Report
CIRS Reporting Requirements
Questions & Answers

Q: In running the A30 and A32 reports this month…we found no SSNs on either report. That was problematic since SSNs are the data elements by which our Registrar checks for Unit 11 student-employees who have “opted out.” I respectfully request that SSNs be added to both reports for future R11 reporting purposes.
A: SSNs have been added to both campus compendium reports (A30 and A32) and will be available beginning with the 0604 cycle. It is very important to remove SSNs before emailing reports to Chancellor’s Office as email is not considered a secure method of transmitting confidential information.

Q: Why are some student employees’ home addresses blank on the A30 report?
A: Employees with a missing address indicate those who have indicated their desire to have their address withheld. The employee would have completed a “Request for Nondisclosure of Employee Home Address” form in their payroll office. This is different than those who opt out of the directory listings.

Q: Is the data contained on both compendium reports (A30 and A32) considered confidential information? If HR downloads the information and needs to send it to their payroll department, would email transmission be violating confidentiality rules because it contains detailed employee information for some opt out employees?
A: As a general rule emailing of confidential information is not to be done unless the data is encrypted. Now that SSNs have been included, the file is considered confidential. The campus can contact their Information Security Office for more direction on this.

Q: If the monthly deadline falls within a holiday week, shouldn’t the deadline be extended to the following Friday?
A: Yes, the parties have mutually agreed upon the contractual interpretation of reporting deadlines. CSU and UAW agree that report deadlines will be extended to the following Friday when a holiday occurs in the 1st full week of any month. The 2006 schedule, provided with the reporting instructions, has been updated.

Q: Currently our office does not have access to CIRS; we elect to use PeopleSoft for our data reporting. Do you see a problem with us generating the report from PeopleSoft instead of PIMS?
A: The data must be pulled from CIRS (PIMS), which means that the campuses will have to coordinate with a CIRS user, either within or outside the department. If your department does not have a CIRS user, you may want to check with Human Resources or the payroll department.

Q: When will the A30 and A32 reports be available to download from CIRS each month?
A: Both compendium reports (A30 and A32) should be available to download the first workday of every month after 10:00 a.m. For example, April's reports should be available April 3 after 10:00 a.m.
Monthly Opt Out Report
CIRS Reporting Requirements
Questions & Answers

Q: I don't find the reports available in CIRS. Are they not yet mounted, or does this mean I need to contact HRA to get my access changed? If not yet mounted, when will they be so I can test them?
A: The reports (A30 and A32) should be available to download the first workday of the month after 10:00 a.m.

Q: What data is provided to assist us with name checking if we have duplicate names?
A: The campus reports are sorted by last name so if any duplicate names exist, they will be grouped together.

Q: Why is the population between the 2 files different?
A: Employees who are separated would not appear on the A30 file. However, they may have received pay in the reporting month and would appear on the A32 file.

Q: How should the files be named?
A: There is no current naming convention. It is suggested that the CIRS compendium code be included in the file name (A30 or A32) and perhaps the month/year that reports are being submitted.
Monthly Opt Out Report
To Transfer Your File To The CO

1. Select File Transfers > Campus Submission from the main menu.
2. Select the campus from the dropdown list. Values displayed for the month and year are for the current reporting process.
3. Click on the Transfer File(s) button.
4. The Upload/Download File(s) box will display. Click on the Path Name icon.
Monthly Submission of the Opt Out Report
To Transfer Your File To The CO (continued)

5. The Open box will display for you to select the path and file name of your Opt Out report. Click on the Open button.

5. The Upload/Download File(s) box will display with the file name that you selected. Enter a name for the Opt Out report > click on the Save button.

6. The Submitted box identifies the status of the campus submission. The box will be checked to identify that the campus Opt-Out Report has been successfully submitted.
Monthly Opt Out Report
To View or Delete An Uploaded File

1. Select **File Transfers > Campus Submission** from the main menu.

2. Select the **campus** from the dropdown list. The month and year displayed are for the current reporting process.

3. Click on the **Transfer File(s)** button.
Monthly Opt Out Report
To Delete An Uploaded File

4. The Upload/Download File(s) box will display. Select the report you want to view or delete.

5. To view the report, click on the **Open** button. The report will display.

6. To delete report, click on the **Delete** icon.

7. A message will display to confirm the file to be deleted. Click on the **Yes** button.
Data Field Definitions

List Grievances

Case ID
System generated to uniquely identify a case. The format of the case ID is as follows: CBID, calendar year, and sequence number. For example: R03-2005-001.

Campus
Two-digit campus code.

Calendar Year
Identifies the calendar year. Format: YYYY

CBID
Identifies the collective bargaining unit.

CO Manager's Last Name
Identifies the last name of the Chancellor’s Office (CO) manager who has been assigned the case. The CO will fill out this field after the grievance has been filed.

Level ID
Identifies the grievance level as 1,2,3 or 4

Issue ID
Identifies an alleged contract violation. Typically, the issue is a contract provision. An issue is associated with a collective bargaining unit (CBID).

Active/Open Cases
Identifies all active cases.

InActive/Closed Cases
Identifies all inactive cases.

Grievant
Identifies the employee’s full name or in the case of a union grievance, the union. The format is first name (space) last name. For example: Jane Doe

Case Create Date
Date the grievance record was created. This is not necessarily the date the grievance was officially filed.

Case Close Date
Date the case was closed. Unless the case is withdrawn or settled at the campus level, the CO is where the case is officially closed.
Data Field Definitions
Maintain Grievances

Case ID
System generated to uniquely identify a case. The format of case id is as follows: CBID, calendar year, and sequence number. For example: R03-2005-001.

Campus
Two-digit campus code.

Calendar Year
Identifies the calendar year. Format: YYYY

CBID
Identifies the collective bargaining unit.

Case Close Date
Date the case was closed. Unless the case is withdrawn or settled at the campus level, the CO is where the case is officially closed.

Case Description
Identifies comments at the case level.

CO Manager’s Last Name
Identifies the last name of the Chancellor’s Office (CO) manager who has been assigned the case. The CO will fill out this field after the grievance has been filed.

Type
Identifies the type of case. i.e. G= Grievance, P=Policy, C=Complaint. Type is associated with a collective bargaining unit (CBID).

Issue ID
Identifies an alleged contract violation. Typically, the issue is a contract provision. An issue is associated with a collective bargaining unit (CBID).

Legacy Key
Identifies a case ID that is associated with a case in the past or a legacy case.
Data Field Definitions
Maintain Grievances (continued)

Grievance Levels ID
Identifies the grievance level as 1, 2, 3 or 4. Grievance Levels ID is associated with a collective bargaining unit (CBID).

Grievance Levels Filing Date
Date the level was filed.

Grievance Levels Meeting Date
Date the meeting was held.

Grievance Levels Response Date
Date campus response is due. This field is manually entered by the campus as the parties may mutually agree to extensions in order for the campus to fully investigate grievances.

Grievance Levels Extension
Number of days agreed upon by the campus & union to extend the designated response deadline.

Grievance Levels Settlement Date
Date the case was settled.

Grievance Levels Comments
Identifies comments, such as new issues raised or whether an extension was granted, at each level.

Grievance Levels Attachment
Stores the file name of the document attached. Typically, the campus should attach grievance filings, responses and other relevant information presented. The campus should be descriptive in naming attachments (i.e., 5-01-006LVL2resp.doc for the level two response or 5-01-006LVL2filing.doc for the filing).

Grievant Name
Identifies the employee's full name or in the case of a union grievance, the union. The format is first name (space) last name. For example: Jane Doe

Grievant President's Decision
The fields in the President's Decision frame are enabled when Statutory Grievance is specified for the type, CBID is R03, and the Level 2 Response Date has been entered.
Data Field Definitions
Maintain Arbitrations

Case ID: CBID, calendar year, and sequence number. For example: R03-2005-001.

Campus Name
The name of campus associated with the case.

Grievant
Identifies Grievant name associated with a particular case.

Legacy Key
Identifies a case ID that is associated with a case in the past or a legacy case.

Arbitrator’s Last Name
Identifies the Arbitrator’s Last Name.

Umpire
Identifies the arbitrator as also being the umpire. This field is displayed only for R03 and Issue ID must consist of 12 or any variation of 12 (e.g., 12.1, 12.2). For statutory grievance, the President’s decision must be rejected. For contract grievance, only the common rules apply.

Arbitration Filing Date
Date the Arbitration was filed. Mandatory.

CO Manager’s Last Name
Identifies the last name of the Chancellor’s Office (CO) manager who has been assigned the case. The CO will fill out this field after the grievance has been filed.

Arbitration Scheduled Request Date
Requested Date for the Arbitration.

Arbitration Dates & Status
Actual Arbitration Date along with any status changes to a date.
Data Field Definitions
Maintain Arbitrations (continued)

Union Position Comments
CO summary of the union’s arguments at the hearing.

CSU Position Comments
CO summary of the University’s arguments/defenses at the hearing

Arbitrator’s Decision
CO summary of the arbitrator’s ruling.

Decision Date
Date the arbitration decision was made.

Award Status
Identifies the award status whether the case was sustained, denied, split or found arbitrable.

Settlement Date
Date the arbitration was settled. The settlement date can be lesser than, equal to, or greater than the arbitration date.

Lead Case
Identifies the Consolidated Case ID.

Case ID
Identifies the Consolidated Case ID.
Data Field Definitions

Ultra Search

Keywords
Allows the user to identify keywords or terms for the search engine to find.

Title
List the title/name of the documents that contained the terms identified in an Ultra Search.

Arbitrator
Identifies the Arbitrator's Last Name.

Case Number
Identifies the Consolidated Case ID.

Campus Name
The name of campus associated with the case.

Grievant Description
A brief description of the grievance.
Data Field Definitions
Reports
Active/Inactive Cases Report

Active/Open Cases
Identifies all active cases.

Campus
The campus code of the campus associated with the case.

CBID
Identifies the collective bargaining unit.

Filing Date (From)
The Beginning date that the case was filed.

Filing Date (To)
The Last date that the case filed.

Grievant
Identifies the employee’s full name or in the case of a union grievance, the union. The format is first name (space) last name.

Issue ID
Identifies an alleged contract violation. Typically, the issue is a contract provision. An issue is associated with a collective bargaining unit (CBID).

Response Date (From/To)
Identifies the beginning and ending range of the date that the campus response. This field is manually entered by the campus as the parties may mutually agree to extensions in order for the campus to fully investigate grievances.
Data Field Definitions
Reports
Arbitration Decisions Report

Role
Identifies the role for which the report is being prepared. Valid values are: FAC, UAW, and STAFF.

Decision Date (From/To)
Identifies the beginning and ending dates of when a decision was made with the arbitrator.
Data Field Definitions
Reports
Response Deadlines Report

Campus
Two-digit campus code of the campus that is associated with the case.

CBID
Identifies the collective bargaining unit.

Grievant
Identifies the employee's full name or in the case of a union grievance, the union. The format is first name (space) last name.

Meeting Date (From/To)
Identifies the beginning and ending dates of the meeting that was scheduled with the grievant.
Data Field Definitions
Reports
Statutory Grievance Cases Report

Campus
Two-digit campus code of the campus that is associated with the case.

President's Decision
Identifies all statutory grievance cases that were 'accepted' and/or 'rejected' by the President.

President's Decision Date (From/To)
Identifies the dates of when the decision was selected and entered.
Data Field Definitions

Reports

Permanent Umpire Arbitration Cases Report

Campus
Two-digit campus code of the campus that is associated with the case.

Umpire
Identifies arbitration cases where the arbitrator is also the umpire.
Data Field Definitions

Reports

Scheduling Art 12 Umpire Arbitration Cases Report

Case ID
System generated to uniquely identify a case. The format of case id is as follows: CBID, calendar year, and sequence number. For example: R03-2005-001.

Campus
Two-digit campus code.

CBID
Identifies the collective bargaining unit.

Grievant
Identifies the employee’s full name or in the case of a union grievance, the union. The format is first name (space) last name.

Arb. Filing Date (From/To)
Identifies the beginning and ending dates.
Data Field Definitions

File Transfer

Campus Submission

**Campus**
Two-digit campus code associated with the campus name.

**Month**
Identifies the processing month of the Opt-out Report. The system defaults to the current reporting month.

**Year**
Identifies the processing year of the Opt-out Report. The system defaults to the current reporting year.

**Code**
See Campus.

**Campus Name**
The descriptive short name of the campus for report submitted.

**Submitted**
The Submitted Box identifies the status of the campus submission. The box will be checked to identify that the campus Opt-Out Report has been successfully submitted.