Grievance Tracking & Reporting

User Guide

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Sept. 2013

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Grievance Tracking & Reporting Database

Introduction

The Grievance Tracking & Reporting Database was initially designed to simplify the administration of the modified grievance/arbitration process being used at Air Canada and Jazz. As the grievance data has accumulated, it has also proved to be a valuable tool for researching grievances. Currently there are over 2,400 grievances contained in the database emanating from almost every bargaining unit in CAW Local 2002. With the cooperation of everyone involved, the database can continue to grow in both size and value.

The success and usefulness of the database depends upon information being provided by those responsible for filing and processing grievances. The Unifor Local 2002 Grievance Coordinator will be maintaining and updating the database, but timely and accurate information provided by District Chairpersons and Bargaining Committee Representatives will continue be the backbone.

What you can do to help

- Use the Grievance Report Form and submit it to the Grievance Coordinator by email.

- Fill in the required fields on the Grievance Report Form carefully and accurately. If you're filling it out by hand, make sure your writing is legible.

- When describing the grievance, be descriptive enough so that anyone reading it can figure out what the grievance is about.

> *Use this description:*   *Change of shift without required notice on Dec. 1, 2007*
>
> *Not this:*   *Change of shift*

- If the grievance concerns discipline/discharge, send the Grievance Coordinator a copy of the letter the employee received. This will state why the employee was disciplined/discharged and can be used by the Coordinator to complete the grievance database document.

What Next?

- If you need to install the required programs, see Appendix 1, "Required Programs and Files" starting on page 41.

- If you want to know about the Grievance Form, see the section "Using the Grievance Report Form" starting on page 4.

- If you need help with the askSam Grievance Program, see the section "Using the Grievance Database" starting on page 16.

Using the Grievance Report Form

The Grievance Report Form has been developed to standardize the method of filing grievances. Using this form will ensure that the necessary information is provided in a consistent manner across all of the Local's bargaining units and will also make it easier to maintain the grievance database.

The preference is to have the form completed on your computer, but it's also possible to fill it in by hand (as long as your handwriting is legible!).

Completing the Form

To use the form, click on the Grievance Form hypertext link on the top menu. If you've elected to save a copy of the form on your desktop, double-click on its icon. Either method will open Adobe Reader and the Grievance Form.
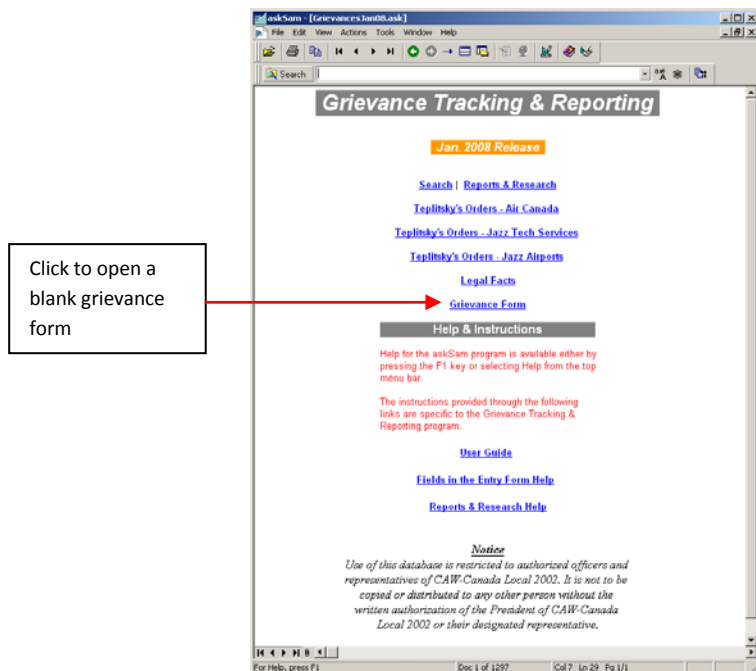
Completion of some of the fields is mandatory. This will ensure that some basic information required when filing a grievance is provided. If you click on Highlight Fields in Adobe Reader, the mandatory fields are highlighted with a red outline.

There are a couple of tools in Adobe Reader that will help you fill in some of the fields. The first is the auto-complete feature which will remember what you had entered in other forms and then make relevant suggestions as you type into a field. Once you enter a character into a field, a drop-down box displays a list of only the most probable matches. Double-click or press Down Arrow in an empty field to display an even larger list of possible matches.

To activate this feature in Adobe Reader, go to Edit > Preferences and then click on Forms in the left hand pane. Under the Auto-Complete section click the down arrow on the right side of the box, select Basic from the drop down list and then click OK. If you find the lists are getting too large and unwieldy, you can clear some or all of the choices by going through Edit > Preferences > Forms, clicking on Edit Entry List and then performing your desired action.

Select Forms from the Edit > Preferences Menu

Click the down arrow on the right and then select Basic from the list.

To clear Auto-Complete entries, select Edit Entry List.
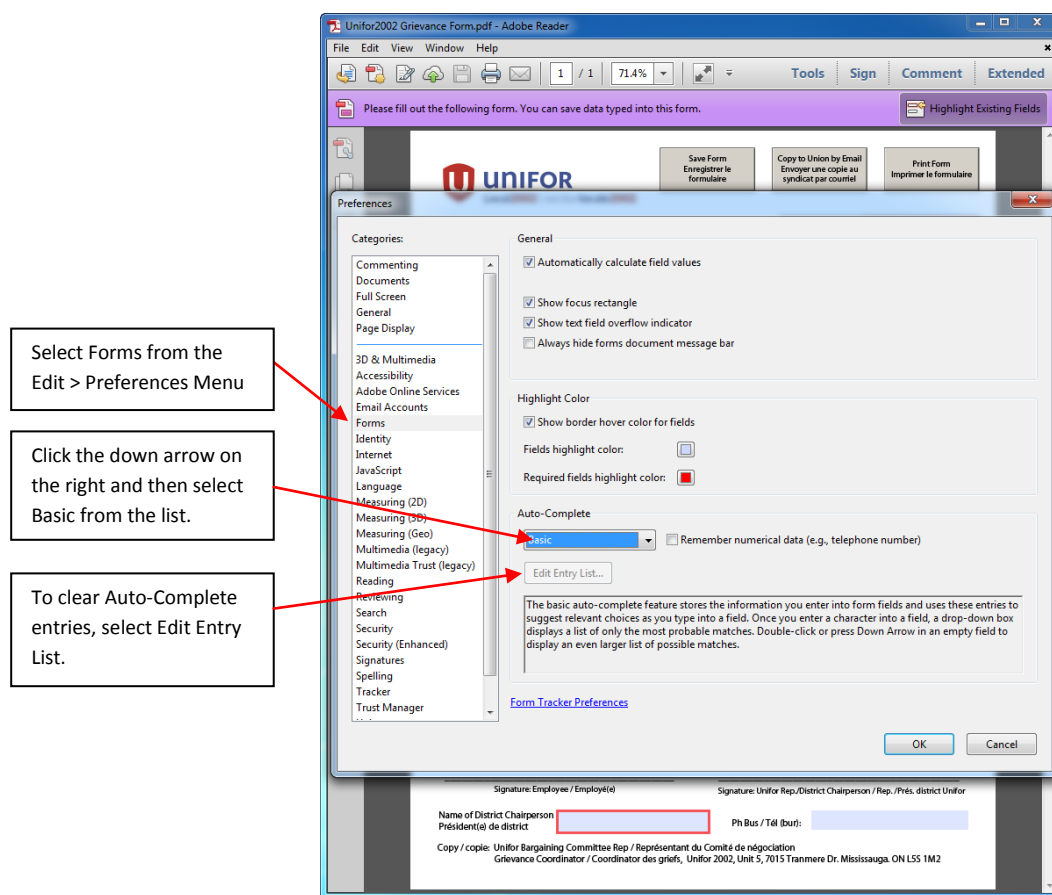
The other tool uses drop down lists which you can use to select the appropriate input. You will know you're in one of these fields when a down arrow appears to the right of the text entry area.

In the Submitted to box, you can either type in the Step the grievance is being submitted to, or you can click on the down arrow and select either Step 1 or Step 2:

For date fields, click the down arrow or press the down arrow on your keyboard and a calendar will be presented from which you can select a date:

In the Grievance Type box, click on the down arrow and select which of the two types the grievance falls into:

While you're encouraged to keep them brief and to the point, the violation description and settlement requested boxes will expand to fit the text you enter, with the form flowing over to a second page if necessary. As you enter the text beyond the original size of the box, a scroll bar will appear on the right side. Clicking outside the box, or moving to the next field, will cause the box to automatically resize to accommodate all the text that has been entered.

Once the form is completed, submit it to the responsible Company official, and provide copies to your Bargaining Committee Representative, the Grievance Coordinator and keep one for your file.

If you complete the form by hand - Fax a copy to the Grievance Coordinator, send the original to the responsible Company official and make copies to send to your Bargaining Committee Representative and for your file.

If you complete the form on your computer - Save a copy under its own name on your computer (use the Grievance No.). Click on the Save Form box, select the folder where you want to save the file and type in the name of the file in the File Name box.

Click on the button on the upper right corner to print out hard copies to send and for your file. Click on the Copy to Union by Email button to email a copy to the Grievance Coordinator.

You will get an error message if you try to email the form without having completed all of the mandatory fields.
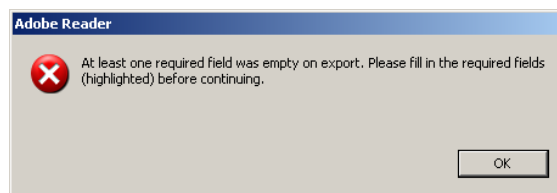
Check and make certain that all the mandatory fields have been filled in. If you haven't already, click on Highlight Fields at the top of the window to highlight the mandatory fields in red.

If you're going to email a copy to the Company, you should first convert the completed form into an Adobe PDF file by following the steps in the next section. Converting the form will ensure it cannot be changed.

Creating an Adobe PDF file

You can create an Adobe PDF of the completed form by printing it to a PDF Printer. The advantage of doing this is that the form is saved in a file that cannot be changed. This file can then be emailed to the company (or anyone else) without concern that it might subsequently be altered in some way.

To do this, you must have a PDF printer driver installed on your computer that will print the grievance to a file instead of a printer. If you haven't, see the section "doPDF Printer" starting at page 45 in Appendix 1.

To print a grievance to a PDF file using the doPDF printer driver, do the following:

1. Use Adobe Reader and the grievance form template to complete the grievance.

2. Click on the Print Form button on the form to bring up the printer dialog.

Click on the Print Form button to bring up the printer dialog

3. Click on the down arrow to the right of the printer name to bring up the list of printers installed on your computer. Click on doPDF to select it as the Printer to be used for printing the form. Click OK.

Click on the down arrow, then on doPDF and then Print.

4. At the next prompt, click on Browse, select the folder where you want to save the file and type in the name of the file in the File Name box. Click on OK to continue. You will have to give the file a name that is different from the name of the file you are printing from.

5. Adobe Reader will reopen and show you the newly created PDF file. If you are using Outlook or Outlook Express to handle your email, you can click on File > Attach to Email to bring up a blank message with the completed form attached. If you use an internet based email client like Hotmail, Yahoo or Gmail, you need to manually attach a copy of your saved form to an email.
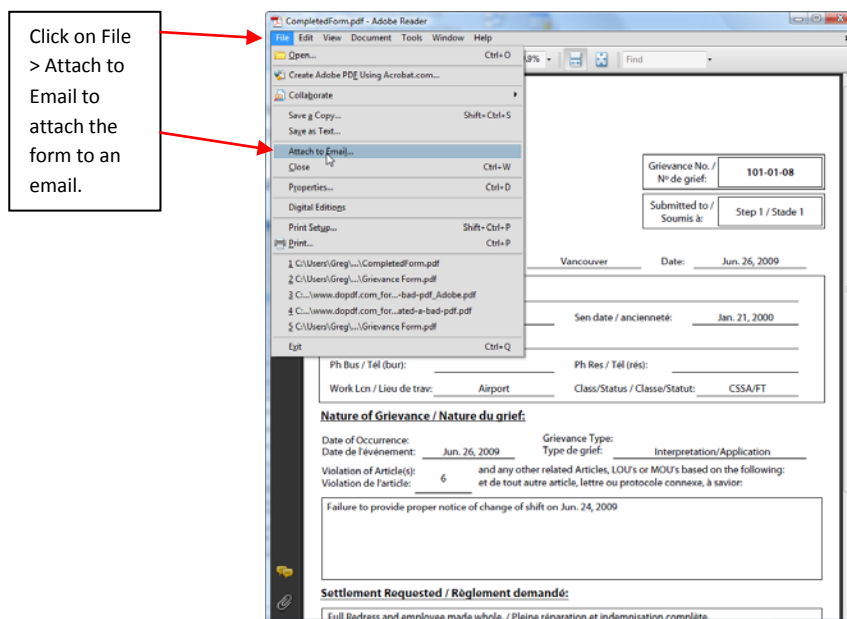
Click on File > Attach to Email to attach the form to an email.

If you want to print a hard copy, click on the printer icon to bring up the print dialog. If the doPDF printer is still shown in the printer name box, click on the down arrow and choose your regular printer.

Click on the printer icon to bring up the print dialog

If doPDF is still shown in the printer name box, click the down arrow and choose your regular printer.
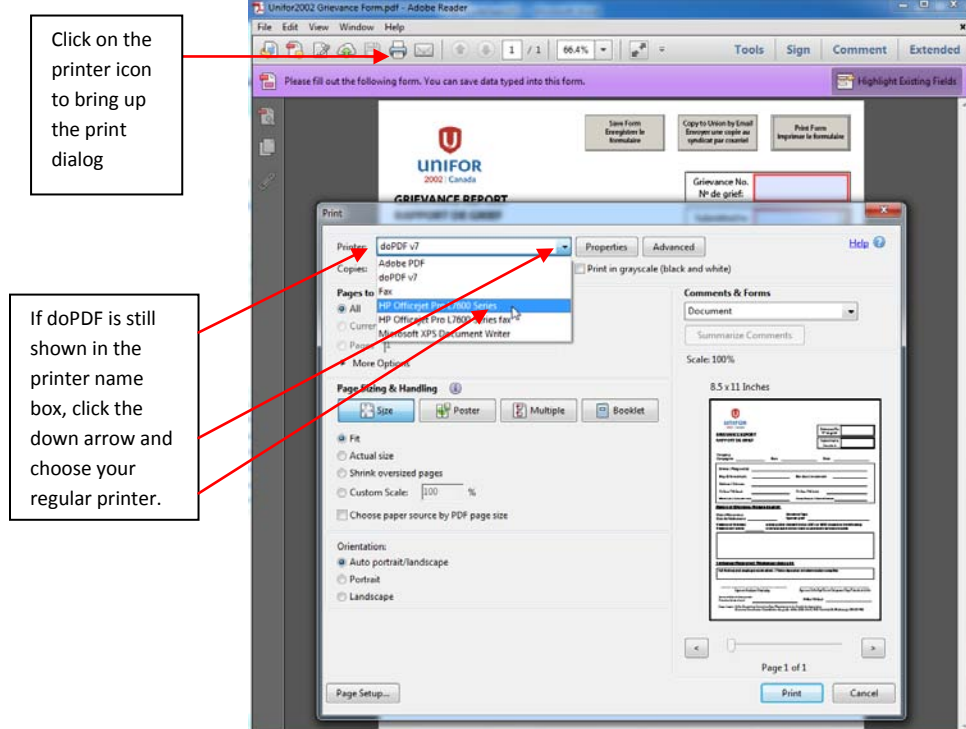
Grievance File Numbering

To help organize our grievance cataloguing and tracking system, a standardized numbering system for grievances that are filed across the system is being implemented. This will ensure that each grievance filed will have its own unique number, and make it easier to zero in on a particular grievance in the system.

For all Districts <u>except</u> those which encompass more than one base, the format is:

District No. – Grievance Sequence No. (at least 2 digits) – Year (2 digits)

For example, if District 100 is filing their 5th grievance in 2007, the number would be:

100-05-07

And if District 319 is filing their 12th grievance in 2007, the number would be:

319-12-07

For Districts which encompass more than one base:

Add the airport code for the base in which the grievance originated:

District No. – <u>Base</u> Grievance Sequence No. (at least 2 digits) – Year (2 digits) – Base City Code

For example, if District 344 was filing their 2nd grievance in 2007 for Sioux Lookout, the number would be:

344-02-07-YXL

Note that for Districts encompassing more than one base, the Grievance Sequence No. is based on the number of grievances filed in the Base, <u>not the District</u>. Thus, it doesn't matter that this may be the tenth grievance filed by District 344 in 2007 – what is counted is that it's the second grievance filed out of YXL/Sioux Lookout.

If your numbering system is different, please switch to this format as soon as possible. If sequence numbers have been used in your system, continue with the sequence but in the new format.

Policy Grievances

For Policy grievances filed by a Bargaining Committee representative the format is:

P - *(Unit identifier) – Grievance Sequence No. (at least 2 digits) – Year (2 digits)*

Use the following Unit identifiers:

Unit	Identifier
Aeroplan	AP
Air Canada Customer Service	ACC
Air Canada Crew Scheduling	ACS
Airport Terminal Services	ATS
Jazz Customer & Aircraft Services	QKC
Jazz Crew Scheduling	QKS
Jazz Technical Services	QKT
Airport Terminal Services	ATS
American Airlines	AA
Canadian North	CAN
CLS Catering	CLS
Dryden Air Services	DAS
First Air	7F
GTAA	GTA
Handlex	HDX
Hilton	HIL
Imperial Parking	IPK
Morningstar Air Express	MAE
ORNGE – Ont. Air Ambulance	OAA
Servisair	SER
Skyservice	SKY
United Airlines	UAL
Webb Airport Services	WAS
Worldwide Flight Services	WFS

For example, the 5th policy grievance filed by Jazz Technical Services in 2007 would be:

P-QKT-05-07

Using the Grievance Database

Starting the Program

Assuming you have all of the database components properly installed on your computer, you can start the program by double-clicking the shortcut icon on your desktop, or opening the Grievances folder and double-clicking on the GRIEVANCES.ask icon.
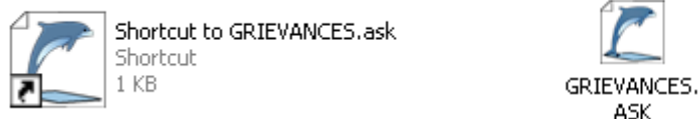
Note: The Grievances file will also have the release month and year in its name. For example, the file name for the August 2013 release is GrievancesAug13.ask.

The askSam Viewer Screen

The first time you open the file, you will be asked if you want to index the file:
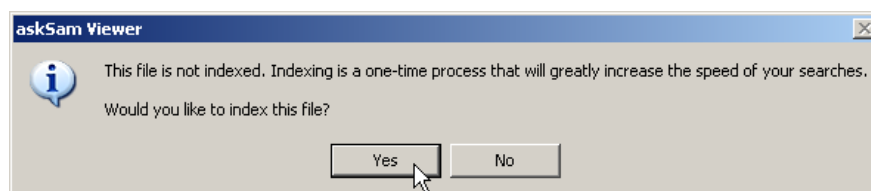
Click on Yes, and then on Index File:
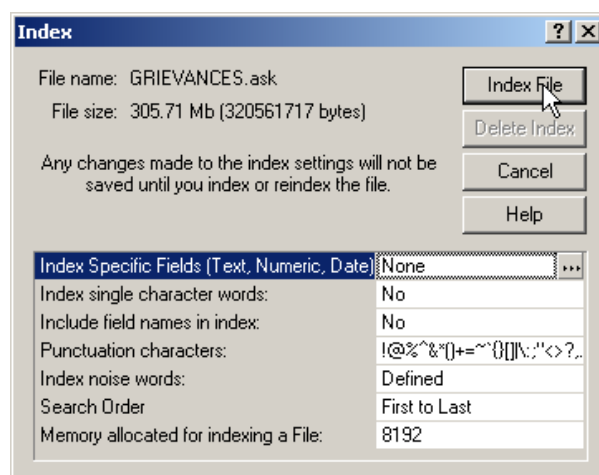
When the indexing is finished, click on Close:
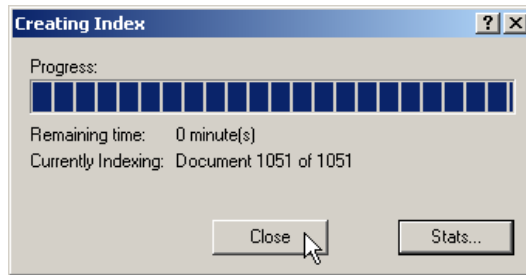
The Top Menu page will then display and will look something like this:

Folder view

Attachments

Paper Clip
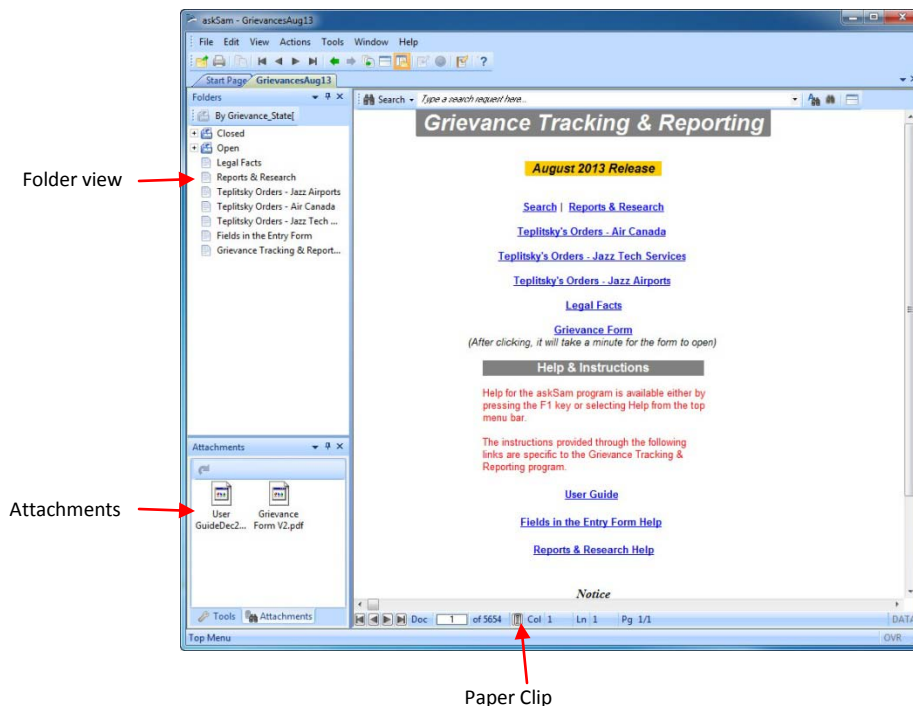
On the upper left side of the screen is what's known as Folder View window. This window can closed or opened by selecting View > Folders. The lower left side window shows the attachments to the document which is being viewed on the right side of the screen. This window can be closed by clicking on the 'x' in the upper left corner and can be opened again by clicking the paper clip icon in the lower bar of the right side of the screen.

The Screen Layout
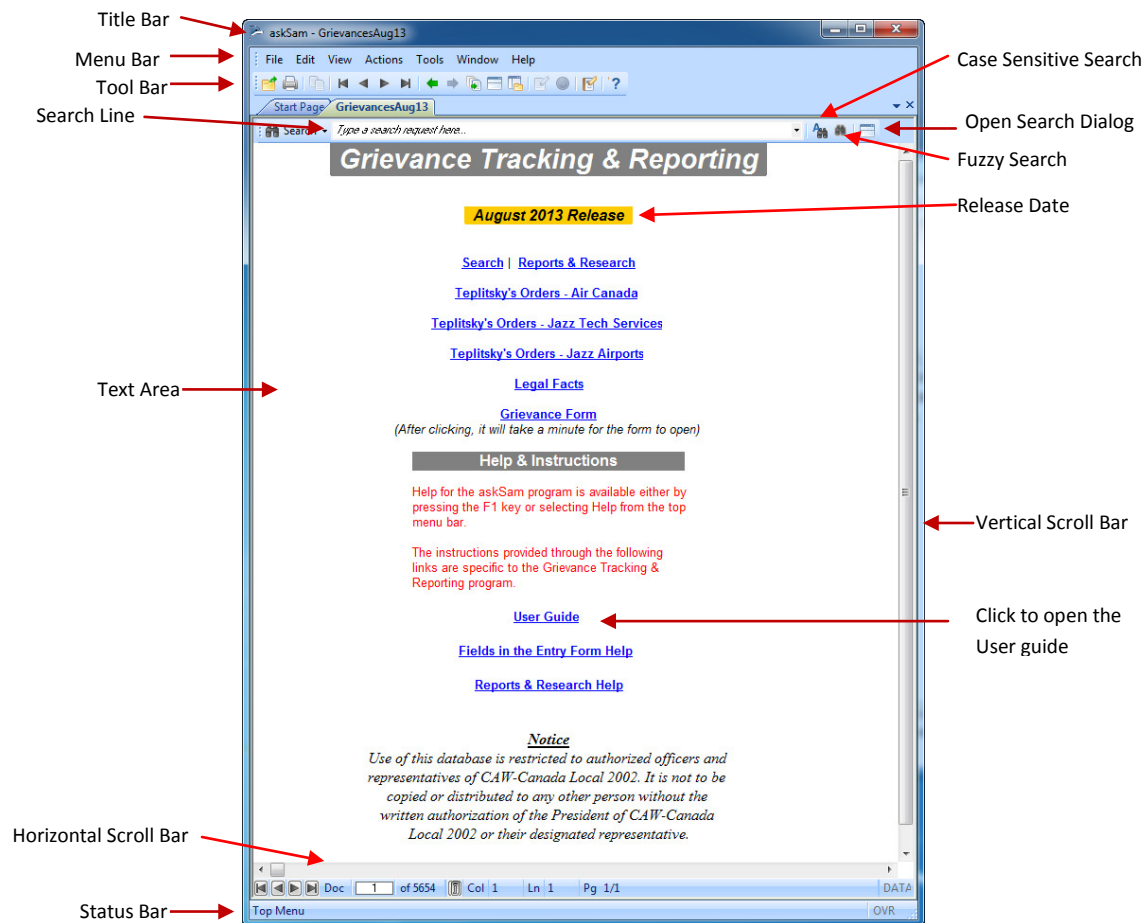
The first line on the screen is the TITLE BAR. It contains the name of the active application (askSam) and the name of the active file (GrievancesAug13).

The second line on the screen is the MENU BAR. From here you can access askSam Viewer's pull-down menus. While the basic functions of the grievance system are accessed through the links on the Top Menu document, the Menu Bar provides many more. Feel free to experiment.

The third line is the TOOL BAR. It contains Buttons (also sometimes called Icons). These Buttons provide quick access to askSam Viewer's functions.

The line beginning with the Search button is the SEARCH LINE. Here you can directly type requests for searches. You move to the Search Line by pressing the ESC key or CLICKING on the Search Line. After you enter a search, press ENTER or CLICK on the Search Button. askSam will search for your request. The Search Line also contains two buttons that affect searches. The Case Sensitive button toggles the Search from Case Sensitive to Non-Case Sensitive. The Fuzzy Search button turns on and off askSam's Fuzzy Search feature.

Underneath the Search Line is the TEXT AREA. This is where the information contained in the Grievances file is displayed. The opening document, works like a menu from which you can access most of the functions you'll be using. This is called the Top Menu document.

Horizontal and Vertical Scroll Bars are located at the bottom of your Text Area and on the right hand side of your screen. With these bars you can scroll through the document on screen using a mouse.

The Horizontal Scroll Bar also contains buttons ⏮ ◀ ▶ ⏭ in the lower left corner that let you move to the First, Previous, Next, or Last Document in the active askSam file. These buttons are also contained in the Toolbar at the top of the screen.

The bottom line on the screen is the STATUS BAR. Here askSam provides you with messages and information about your location on screen. It also contains a Document Counter which tells you which document you are at out of the total number of documents that are in the system.

There is also a SEARCH RESULTS Window that will appear underneath the Text Area – after you've entered a search. The Search Results Window displays a list of the Documents found by a search. Click on any item in the Search Results Window to display it in the Work Space. This will be explained in more detail later on.

With the Search Results Window open

Search Results
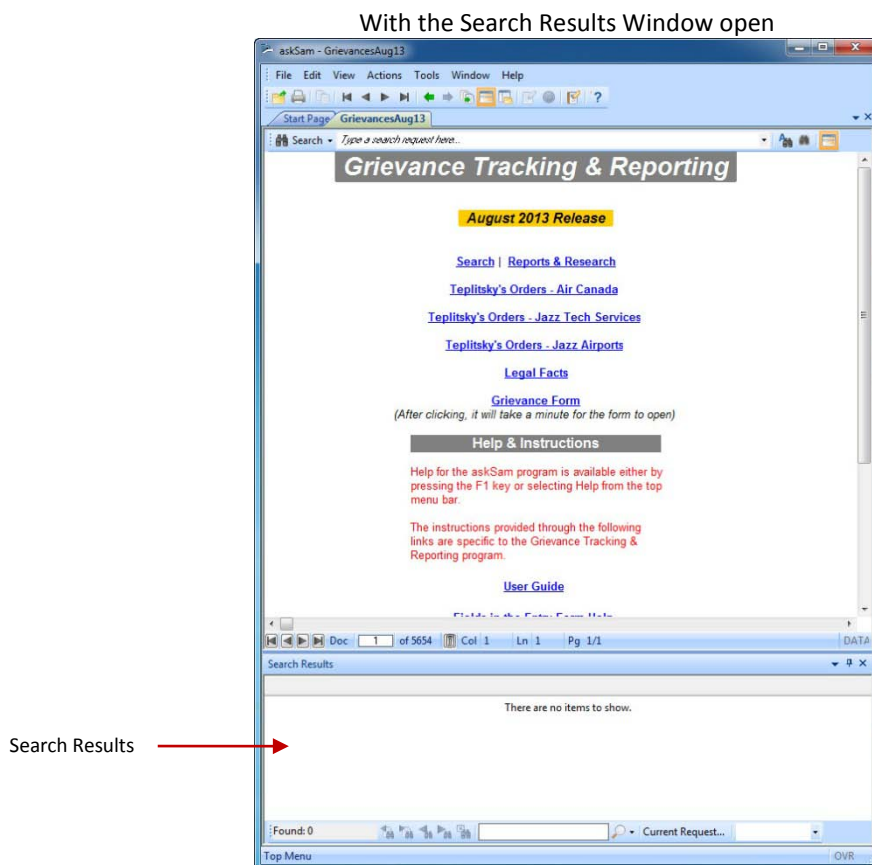
Navigating Through the Database

The Grievances database is comprised of individual data documents. Most contain information on a grievance which has been filed. Others contain menus from which other information can be accessed.

The Top Menu

The first document in the database is the Top Menu:
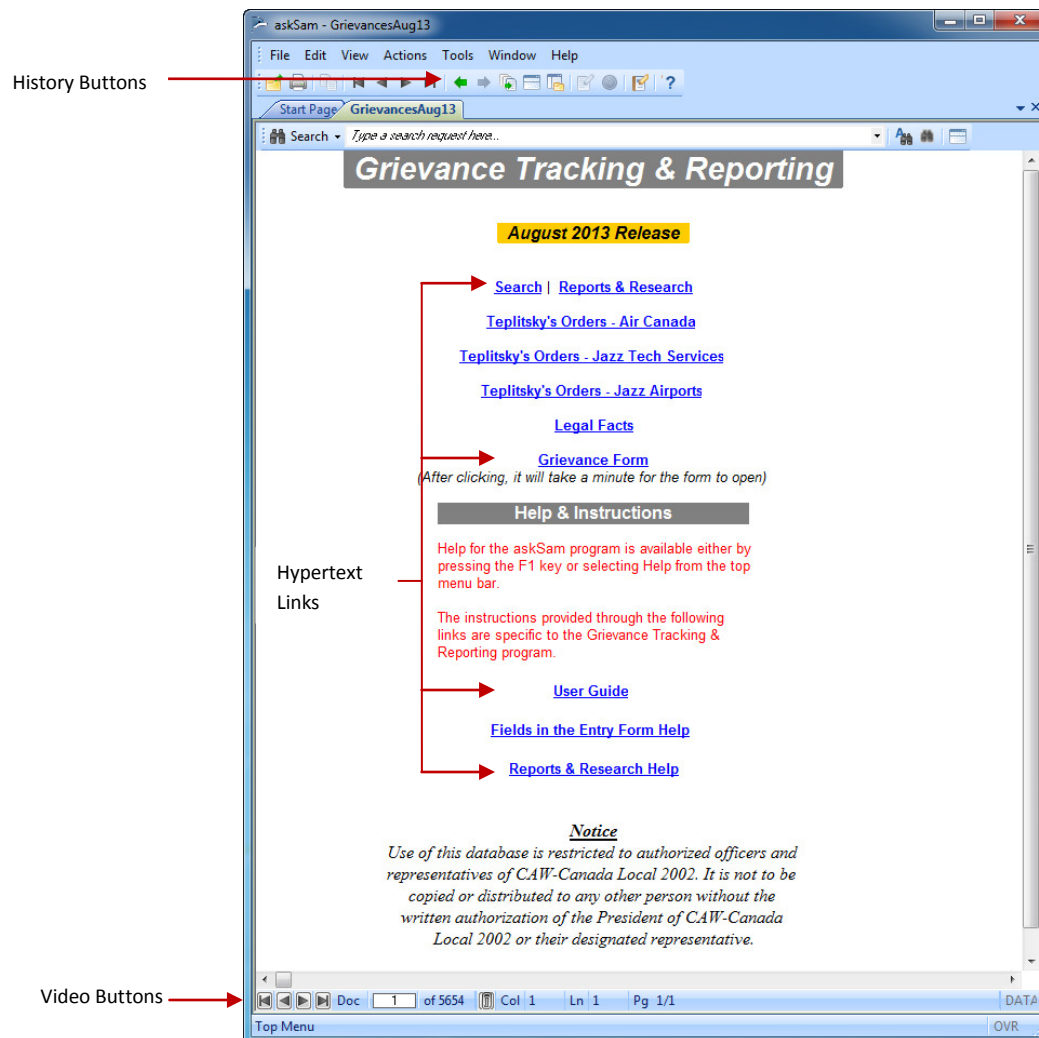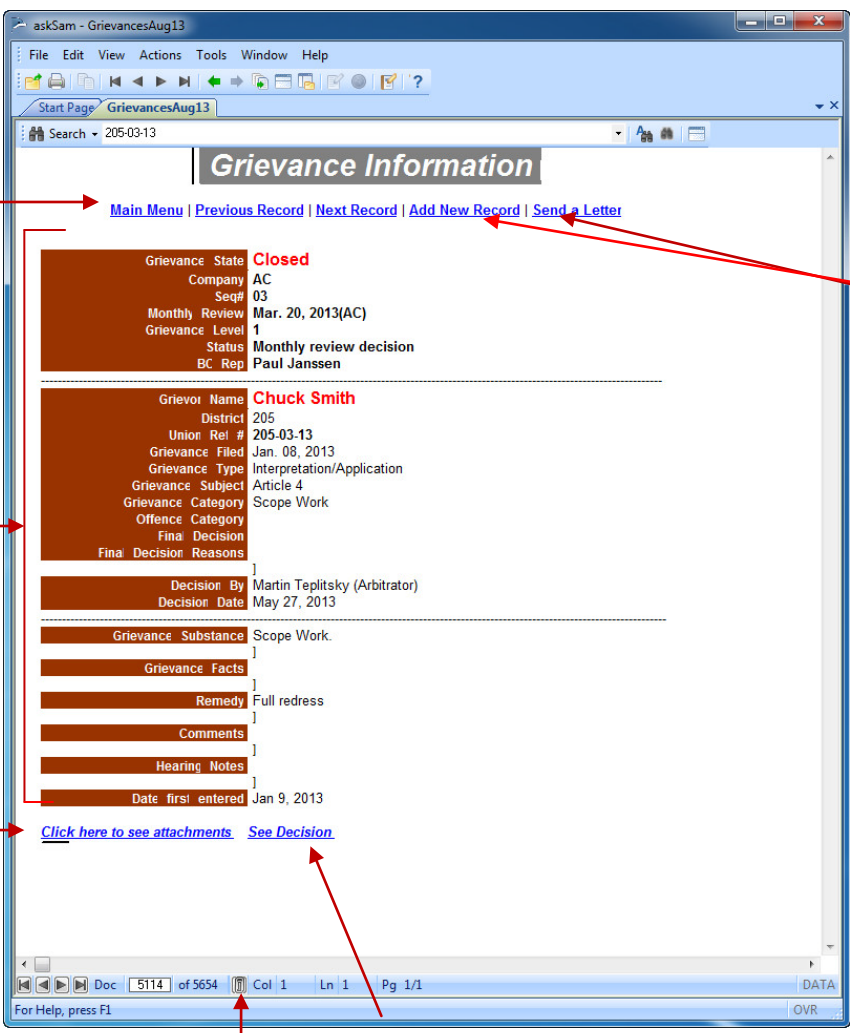
The text that is blue and underlined are Hypertext Links that provide a direct link to commands and documents that are frequently used. Hypertext links are used throughout the database. Move your cursor to the Hypertext and click to access the command or document.

You can also scroll back and forth through documents by clicking on the left and right arrow Video Buttons contained in the Tool Bar or the Horizontal Scroll Bar. The two outermost buttons will take you to either the very first or last document.

If you want to retrace your steps, use the History buttons ⊕⊕ contained in the Tool Bar.

Grievance Documents

Details for each grievance are entered into individual documents based on a template. Each document contains fields into which specific information is entered as it becomes available. At the top of the document are Hypertext Links for moving around the database. At the bottom there is a Hypertext Link which will open the window with the list of attachments (copies of letters, emails, decisions, etc.) that are relevant to that particular grievance. In some cases, there is also a link to the document containing the Teplitsky decision that applies to the grievance.

Fields in the Entry Form

Fields provide structure for the information in each document and make it easier to focus searches within the database. The following table explains what each field contains. This listing is also available through the "Fields in the Entry Form Help" Hypertext Link on the Top Menu.

Field	Information
Grievance State	Shows if the grievance is open or closed. Open = Still in process Closed = Grievance has been resolved or withdrawn
Company	Short forms are used to identify the Company involved: *All* - This is used for searches only. AP = Aeroplan AC = Air Canada Crew Sked = Air Canada Crew Sked AirCan Vacations = Air Canada Vacations AF = Air France ATS = Airport Terminal Services American = American Airlines AE = American Eagle Cdn North = Canadian North CLS = CLS Catering Dryden = Dryden Air Services First Air = First Air GTAA = GTAA Handlex = Handlex Hilton = Hilton YSJ Imperial = Imperial Parking JazzCW = Jazz Crew Sked JazzCS = Jazz Customer Service JazzTS = Jazz Tech Services Morningstar = Morningstar OAA = Ornge (Ontario Air Ambulance) SER = Servisair Skyservice = Skyservice UAL = United Air Lines Webb = Webb Airport Services WFS = Worldwide Flight Services
Monthly Review	The date of the first monthly review that the grievance was scheduled to be dealt with.
Grievance Level	Specifies if the grievance is being heard at Level 1, Level 2 or arbitration. The level is updated if the grievance goes to arbitration. 1 = Level 1 2 = Level 2 Arbitration

Field	Information
Status	The current status of the grievance. Updated as the grievance progresses. Level 1 outstanding Level 1 heard - denied Level 2 outstanding Level 2 heard - denied Settled Settled at monthly review Adjourned pending Held in abeyance Returned for further discussion Referred to pre-hearing officer Referred to arbitrator Arbitration Scheduled Withdrawn Resolved Dismissed
BC Rep Name	Name of the Bargaining Committee Rep responsible for the grievance.
Grievor Name	Who is covered by the grievance. Can also be Policy or Group.
District #	The CAW District # from which the grievance was filed. Policy grievances that aren't attached to a District are shown as "HQ".
Union Ref #	The number assigned by the Union for each grievance filed.
Grievance Filed	Date the grievance was originally filed.
Grievance Type	Specifies what type of grievance it is: Interpretation/Application or Discipline/Discharge
Grievance Subject	Identifies the Article/LOU/MOU violated or if the grievance involves Discipline or Discharge.
Grievance Category	Narrows the subject matter of the grievance, ie Wages, Benefits, Vacation, Discipline, etc.
Offence Category	Used for discipline/discharge cases. Describes the type of offence for which the grievor has been disciplined (eg attendance, theft, insubordination, etc).
Final Decision	Describes the outcome of grievance ie, what was decided. Input when a final decision is made. settled = a settlement was reached by the parties upheld = a decision was issued upholding the grievance partially upheld = a decision was issued partially upholding the grievance dismissed = a decision was issued dismissing/denying the grievance withdrawn = the Union withdrew the grievance
Final Decision Reasons	Outline of the reasons given for the decision. If a Monthly Review

Field	Information
	decision is brief, the whole decision would be included.
Decision By	Name of the manager/arbitrator who made the final decision.
Decision Date	Date of the final decision.
Grievance Substance	The description of the grievance used when the grievance was filed.
Grievance Facts	A brief detailed description of the facts. This field isn't used very often.
Remedy	Description of what has been requested by the Union as a remedy for the violation.
Comments	Place for free-flow comments that don't fit anywhere else. Will often contain information on the status of the grievance as it progresses through the process.
Hearing Notes	This is sometimes used by the Grievance Coordinator as a place for notes taken during a Teplitsky hearing.
Date First Entered	The date the grievance was first entered into the database.

Attachments

Most documents have attachments included. Usually a copy of the original grievance will be attached, and often there will be a copy of any decisions that have been received. There may also be copies of emails or other documents associated with the grievance. If the Attachments window is open, the attachments will be listed. If the window is not open, you can tell at a glance if a document has attachments by looking at the attachment paperclip next to the Video Buttons on the bottom left of the askSam screen.
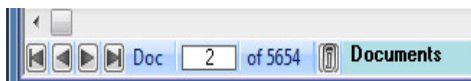
 A dimmed paperclip button means there are no attachments.
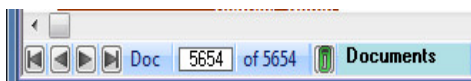
 A highlighted green paperclip means attachments are included.

To access the attachments, you can either click on the paperclip, which will open the window with the list of attachments if it is not already open. Click on the name of the attachment to view it.

Click on the file name to view the attachment.

Attachments window Click the 'x' to close the window.

Click on the hyperlink or the paperclip to open the attachment window.
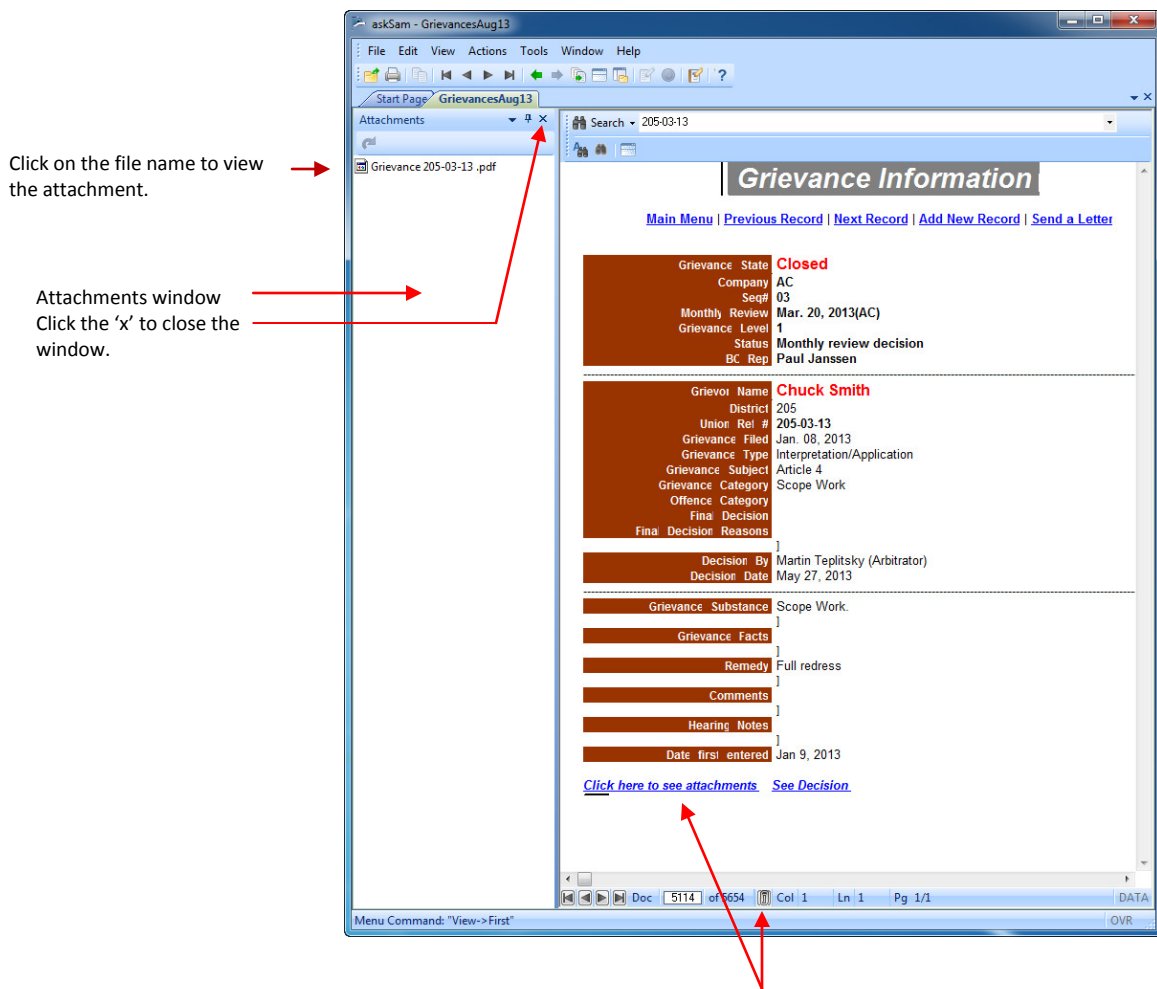
If you wish to close the attachments window, click on the 'x' in the upper right hand corner of the window.

Attachments are limited to 3 types:

Adobe Acrobat .pdf files – You must have Adobe Acrobat Reader installed on your computer to view these files and it should be the latest version. If you don't have it installed, it can be downloaded free from **www.adobe.com**. This application is also required for the Grievance Form.

Picture files – Occasionally, as in the above examples, photographs or other picture files (a copy of a fax for example) may be attached. Windows includes a picture viewer so no additional programs are required to view these files.

Text files – These files have a .txt extension and usually contain copies of an email or other simple notes. Windows includes a notepad application which can display these files.

Attaching files created by word processing programs (eg. Microsoft Word) is limited because these can only be viewed on computers that have those programs installed. There may be the odd attachment of this type in the database that you won't be able to view if you don't have the program installed. Also, you may happen upon an Acrobat .pdf attachment that Acrobat Reader is unable to open because of file corruption. In either event, let the Grievance Coordinator know so the attachments affected can be updated.

Searching

This is the most important and powerful function of the Grievance database. By using the search functions that are available, you can be as broad or narrow as you like in your search, depending on how specific you need the results to be. For example, you can just search for all grievance documents containing a particular word (a broad approach) or you can search for all grievance documents concerned with a particular issue, filed with a particular company in a particular base within a particular period of time (a narrow approach). The results you want will determine which of the search functions you use.

The Broad Approach

The easiest way to search is from the Search Line:

Enter your search term here   Fuzzy Search toggle button

By using the Search Line, it doesn't matter where in the document the search term is located – the entire document will be searched and any that contain the search term will be displayed.

Press the ESC key, or click in the Search Line, and type the search term. askSam will then search all of the documents from the beginning of the file to the end, the Search Results window will open and all of the documents that contain the search term will be listed with the first document found being displayed in the top half of the screen.

From the Search Results window you can:

- Scroll through the list and click on any that might be of interest to see the full document.
- See the context of the hit in the document.
- See the number of documents retrieved by your search.

If you're not sure of the spelling, click on the Fuzzy Search toggle button. For example, if you were looking for Documents containing the name "Kathy". You could use askSam's fuzzy search and find Documents with "Kathy", "Kathi", or "Cathy". The Fuzzy Search overlooks a single error in a word, which can be a missing letter, an extra letter, an incorrect letter, or a transposition (two neighbouring letters in reverse order). When you're finished with fuzzy search, make sure you click on the button again to turn it off.

Here's an example of the results using the Search Line to search on the word "sick".

Click to print the document that's displayed

Click to open or close the search results window

Click the 'x' to close the search results

Search results

Use the scroll bar to move up or down in the list

Number of documents found

Use these buttons to move through the search results or use the arrow keys on your keyboard.

When the search is initiated, the Search Results window opens and displays a summary list of documents containing the search term. In the list, the first document is highlighted and the complete document is displayed in the workspace above the list. You can move from document to document by using the arrow keys on your keyboard (make sure the search results window is active), or by clicking

with your mouse on the document in the list, and the complete document will display in the workspace above. You can also scroll through the list using the scroll bar until you see a document that might interest you, then click on it to display the full document in the workspace.

> ***The Video buttons on the Tool Bar and Horizontal scroll bar do not follow your search results and will take you from document to document in their physical order in the database.***

To close the search results window, you can either click on the 'x' in the upper right corner of the window, or click on the Search Results icon in the Tool Bar.

The Narrow Approach

In the example used for the broad search, 68 documents were found to contain the search term "sick". By using a more narrow approach, you can zero in on grievances that may be more relevant to what you're looking for.

Say you want to still search on "sick", but want the search restricted to documents where the grievance involved an appeal against discipline or discharge by an employee in the Jazz Technical Services unit. Begin by clicking on small downward triangle next to the Search button on the right side of the search line.
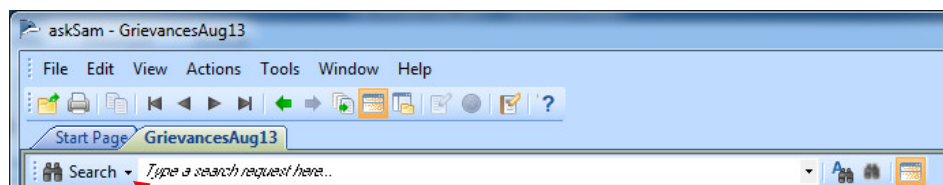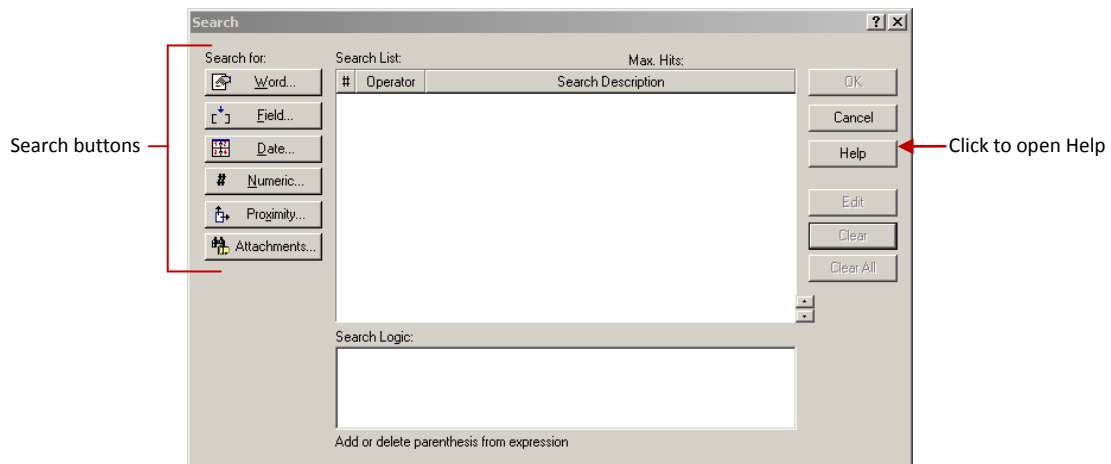

Click on the small downward triangle next to the Search button

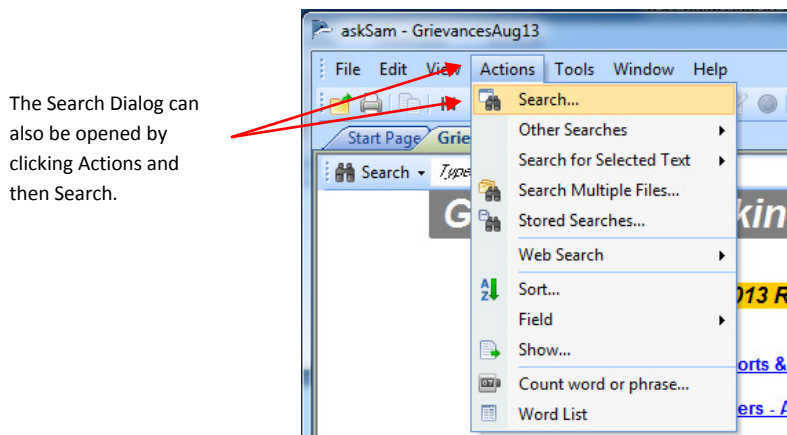And then select "Advanced" from the drop down list:
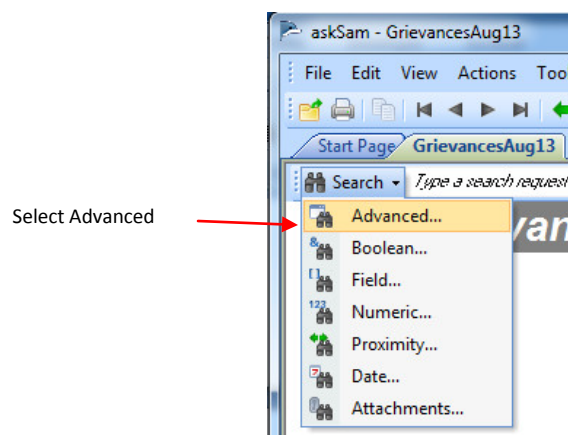
Select Advanced

This will open the Search Dialog:

The Search Dialog can also be opened by selecting Actions/Search using the menu bar.

Search buttons

Click to open Help

The Search Dialog can also be opened by clicking Actions and then Search.


The search buttons on the left of the Search dialog are search options and choosing a button will open the dialog for that search. Because the type of searching you will be doing will usually involve using the Word and Field buttons, this description will deal only with those.

Help on all aspects of the askSam Reader program is always available by clicking Help in the Menu Bar, or in any dialog box or by clicking on the Help button *in the Tool Bar.*

To begin the search, click on the Word search button to open the dialog. Under Word or Phrase, type "sick" (without the quotes) and then click on OK.

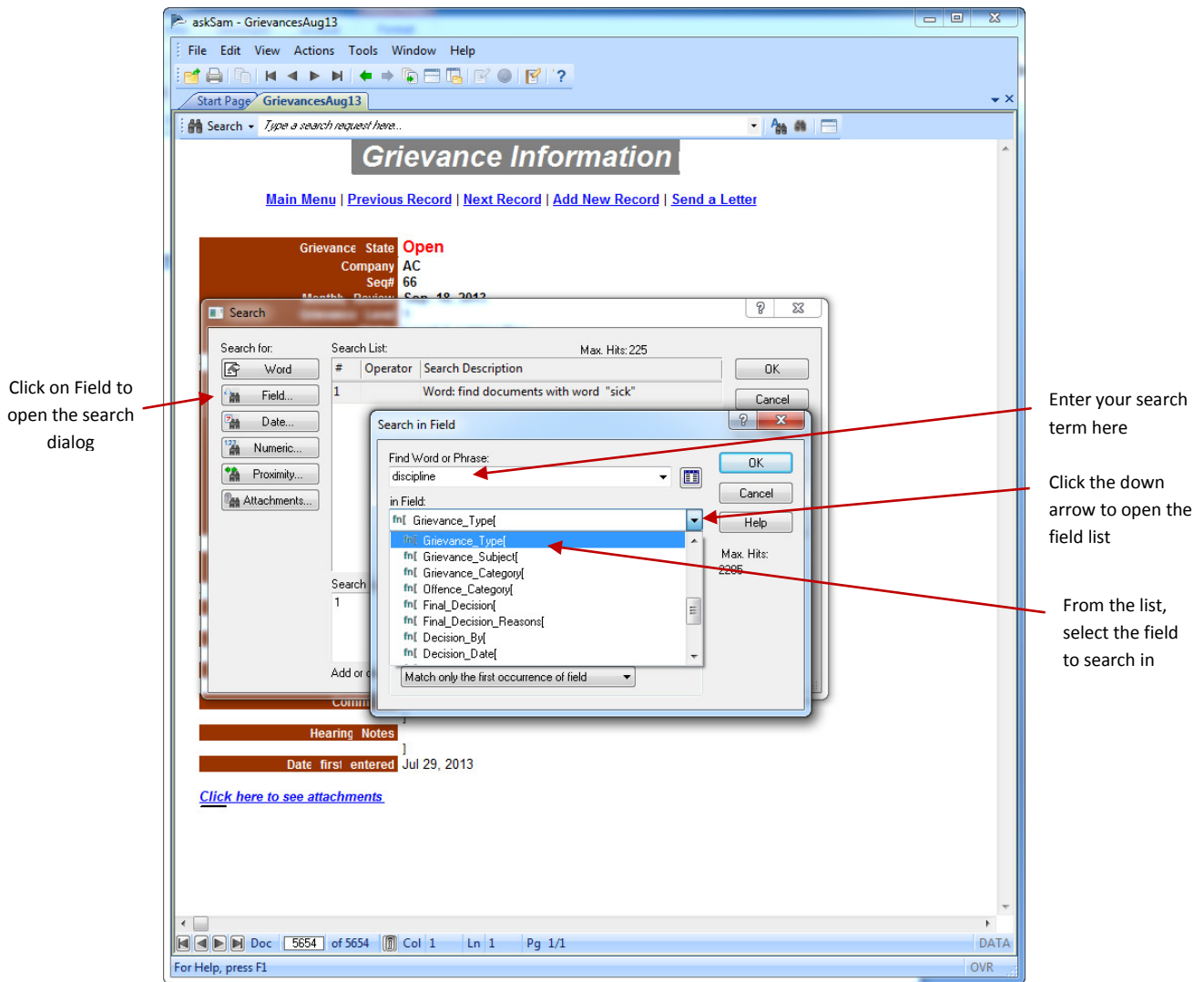Click on Word to open the search dialog

Enter your search term here
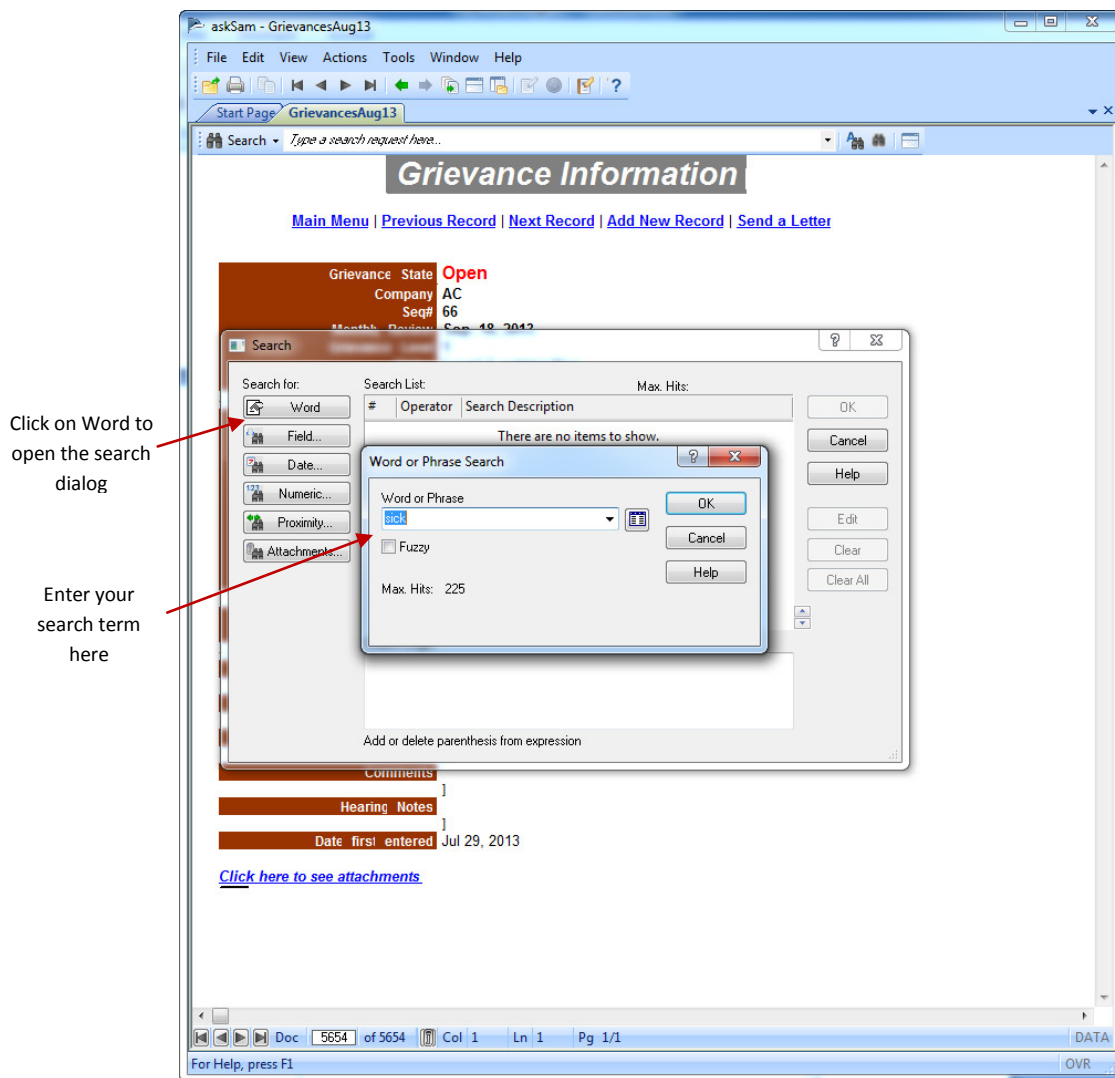
This will enter the search for the word "sick" into the Search list:
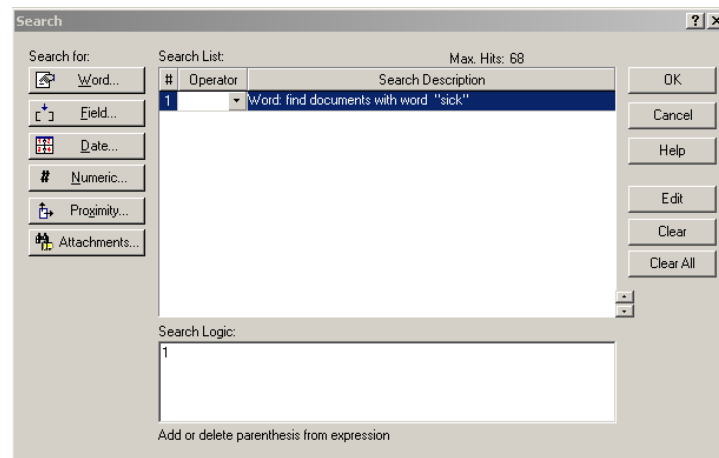
Then, because we want to narrow the search to grievances involving an appeal against discipline or discharge by an employee in the Jazz Technical Services unit, two other search criteria have to be entered. Both of these criteria are contained in fields that are contained in the Grievance Document, discipline/discharge being contained in the Grievance Type field and JazzTS (the shortform used for Jazz Technical Services) being contained in the Company field. Therefore, in defining your search, you'll want to tell askSam to search in the Grievance Type field for the word discipline (or discharge – it's not necessary to specify one or the other since both are contained in the field) AND to search in the Company field for the word JazzTS.

To do this, click on the Field button and type "discipline" into the box under Find Word or Phrase. Next, click on the down arrow next to the In Field Box to open the list of fields, scroll down to Grievance Type and click on it, then click OK. This will enter the search for the word "discipline" in the Grievance Type field into the Search List.

Click on Field to open the search dialog

Enter your search term here

Click the down arrow to open the field list

From the list, select the field to search in

Next, click on the Field button again, type "JazzTS" into the Find Word or Phrase box, open the list of fields, click on Company and then OK. This will enter the search for the word "JazzTS" in the Company field into the Search List. When you're finished, the Search Dialog will look like this:
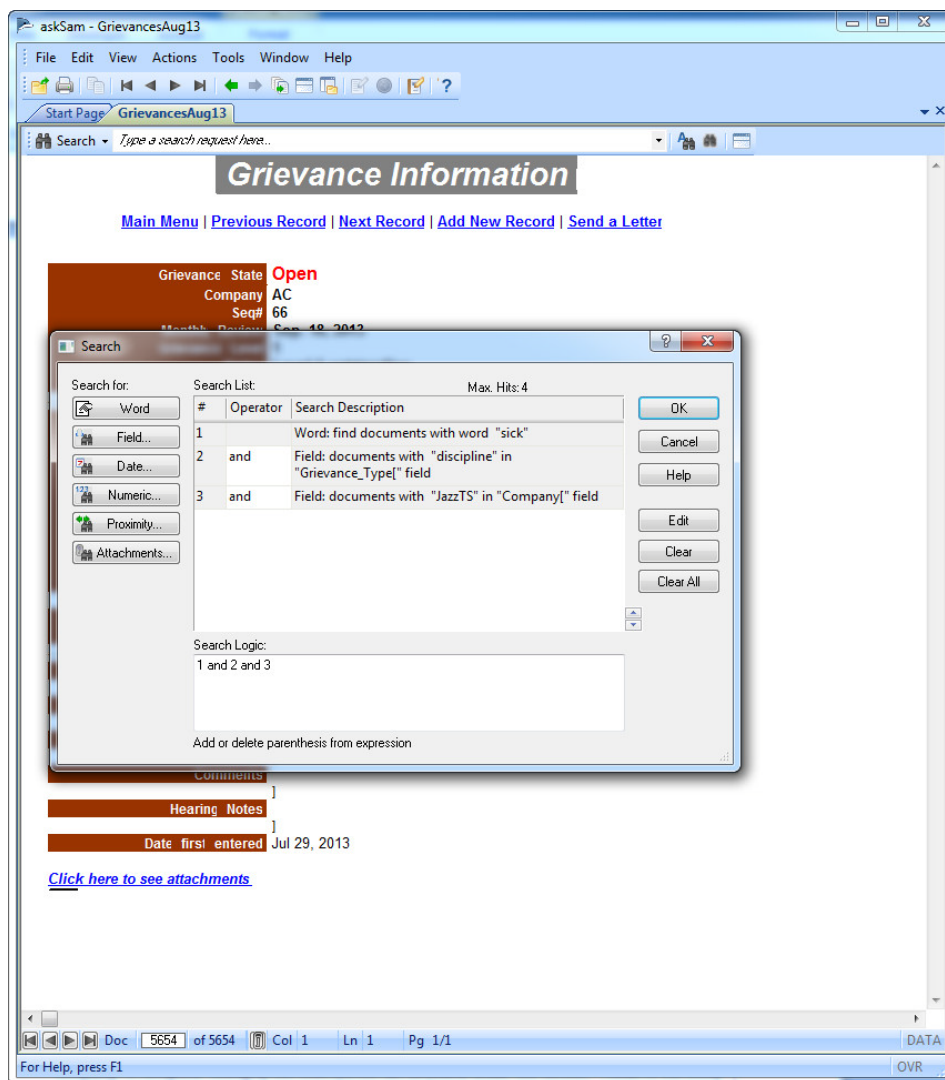
Click on the OK button for the search results. As you can see, narrowing the criteria to what's most relevant to your search, results in your being presented with three grievance which satisfy that criteria:

Click to print the document that's displayed

The specified search criteria is highlighted

Pre-programmed Searches

Sometimes, you'll want a simpler way of narrowing your search, or you'll want to see information on more grievances displayed on the screen when doing a search. Or you'll want to have a printed list, instead of print outs of each individual grievance document. All can be accomplished by using the Reports and Research function.

This function provides a variety of preprogrammed searches where the work of defining the search logic has already been done and where the information resulting from the search is presented in summary form. A description of all of the reports can be obtained by clicking on the Reports & Research Help link on the Top Menu:

Click on the Reports button to display a list of reports.

Click on the hypertext link to run a report
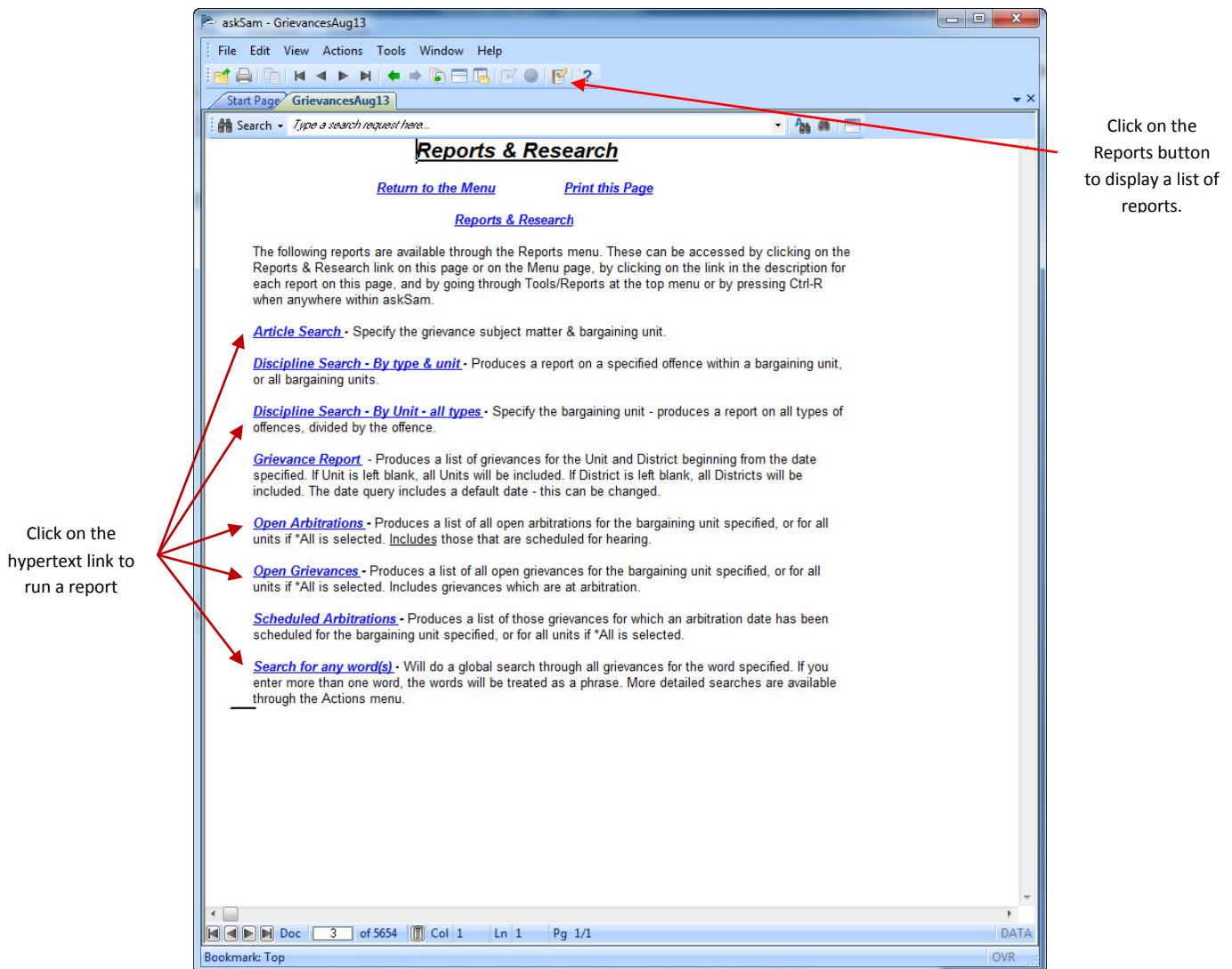
From here, you can run a report by clicking on the hypertext links for each report (the blue underlined heading). You can also run reports by clicking on the Reports & Research Hypertext link on the Top Menu, or by clicking on the Reports button on the Tool Bar when you're anywhere in the database. Whichever you choose, a listing of the reports available will be given and you can select the one you want to run. Once a report is selected, prompts are presented where you can select the search criteria from a list, or in some cases you will need to type in your search term, and then the report with the results will be displayed on your screen.

To print the report that's displayed, click the Printer icon on the Tool bar. In the Print Dialog, next to your printer name, click the Properties button and make sure the settings reflect that the document will print on legal-size paper in landscape orientation. Also make sure your printer is loaded with sufficient legal size paper. Once your settings are adjusted and the paper is loaded, click the OK button to start printing.

If you see a grievance listed on the screen report that you want more information on, double-click anywhere in the row on the report and the full grievance document will be displayed. To return to the report, click on Window in the Menu bar and select the Report that you want.
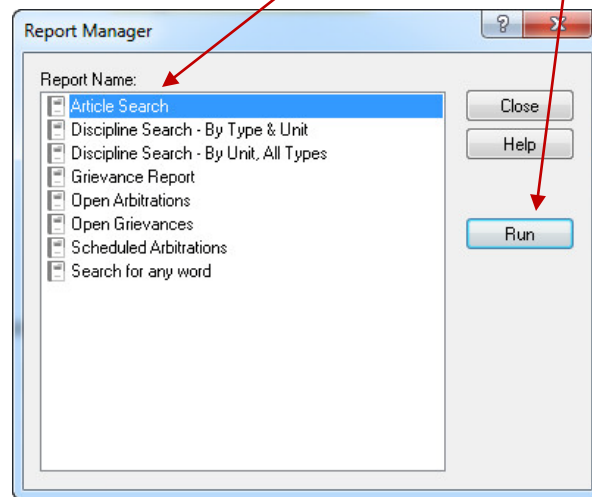
Here's an example using Article Search:

If you're at the Top Menu, click on the Reports & Research hypertext link to open the Report Manager.
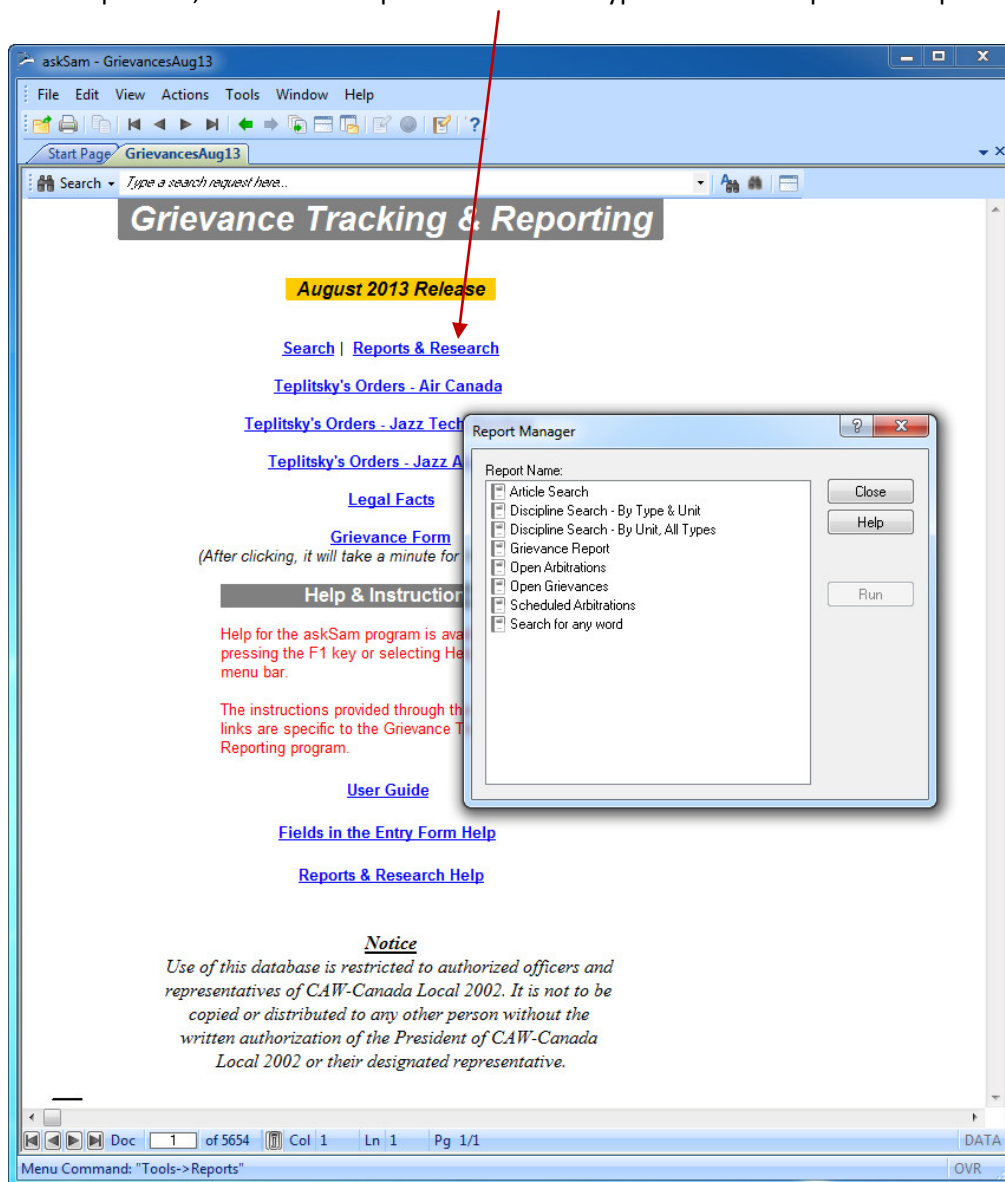
You can also open the Report Manager by clicking on the Reports button on the Tool Bar when you're anywhere in the database.
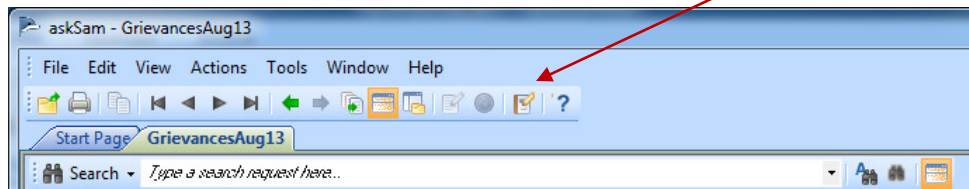
From the list in the Report Manager, click on Article Search and then on Run.

The first prompt asks for the Unit you want the search to focus on. If you want to search through all Units, just click OK to select All. In this example, we'll narrow the search to the Ont. Air Ambulance Unit by clicking on the down arrow on the right of the dialog and then clicking on the Unit name in the picklist that's presented.
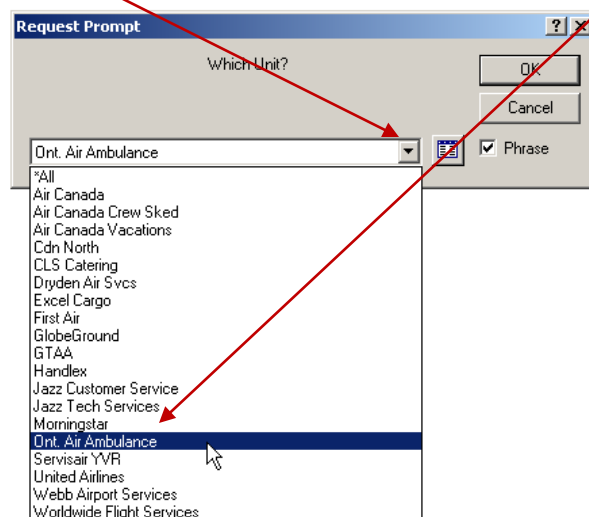
Click on OK to get to the next prompt which asks for the type of violation you're searching for. In this example, we'll narrow the search to Overtime & Recall by clicking on the down arrow on the right of the dialog and then clicking on Overtime & Recall in the picklist that's presented.
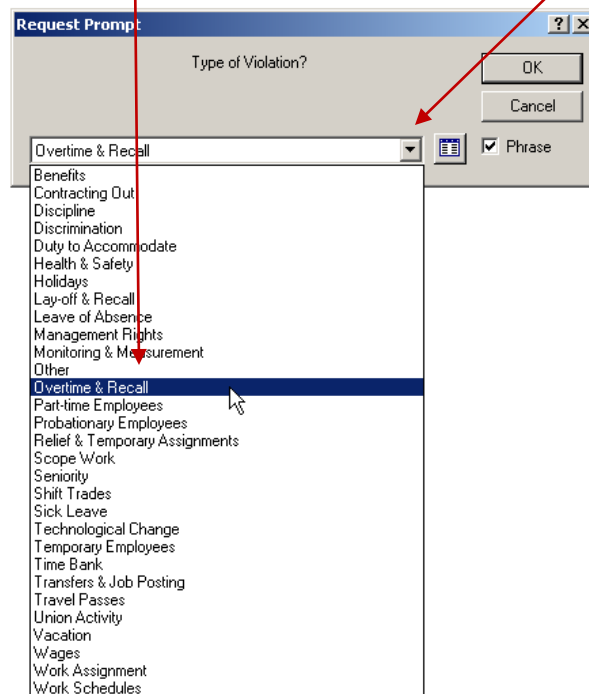
A report will then be presented in a separate window listing all of the grievances in the database which meet the search criteria.

Click on the Grievances tab to switch back to the main window.

When in the main window, click on the Report tab to return to the report.

Click on the 'x' to close the report.

Double-click anywhere between the dotted lines to switch back to the main window with the full document.

A copy of the report can be printed by clicking on the printer icon in the toolbar.

> ***All reports are formatted for printing on legal size paper in landscape orientation. Make sure your printer settings are changed so the report prints properly!***

To view the full document, double-click anywhere in the line on the report containing the summary. This can be done any number of times from the report window so it's easy to view the individual grievance documents contained in the report simply by switching back to the report window and double-clicking on the next grievance you want to view.

To switch back to the main window without closing the report, click on the tab with the Grievances file name on it. You can access the report again by clicking on the report tab. To close the report, click on the 'x' in the upper right when in the reports window.

Appendix 1 - Required Programs and Files

The following programs and files must be installed on your computer in order to take full advantage of all the features of the Grievance Tracking and Reporting database. All of the programs are easily downloaded from the internet and installed onto your computer without difficulty – and they're free! If don't have a high-speed internet connection or are otherwise technically challenged, please contact the Grievance Coordinator for help.

Adobe Acrobat Reader

The grievance form template and askSam require that you have the most recent version of Adobe Acrobat Reader (currently version 9.1) installed on your computer. If you don't yet have it , or if you have an older version installed, you can download and install the latest version from **www.adobe.com**.

Grievance Form Template

The template is included in the Grievance database file and can be opened from the top menu:
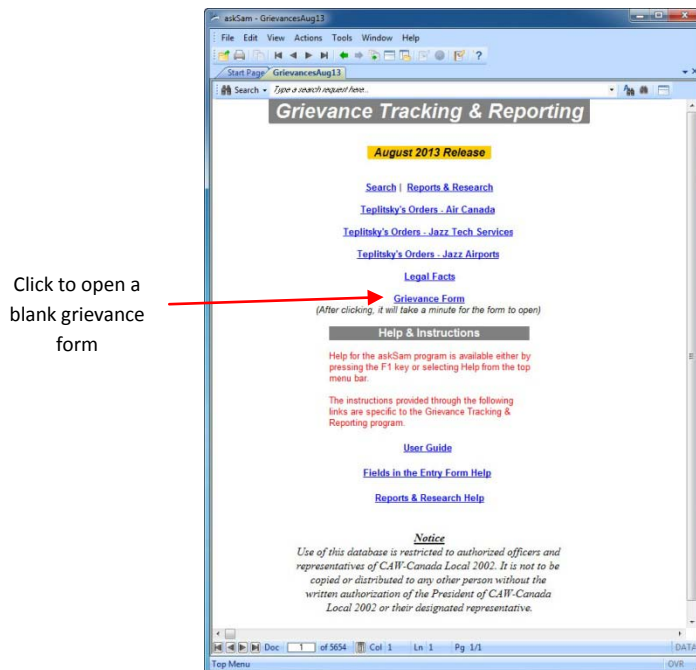
If you prefer to also have the template available through an icon on your desktop, open the template from within askSam and then save the file from the File > Save menu in Acrobat Reader, selecting the Desktop folder (or some other folder you prefer) as the location in which to save it. If you do this, make sure you protect the template file against accidental changes by following these steps:

1. Click on the Grievance form.pdf icon on your desktop to highlight it.

2. With the icon highlighted, click your right mouse button (assuming you're using a right-handed mouse) to open the dialog. Click on Properties on the list.
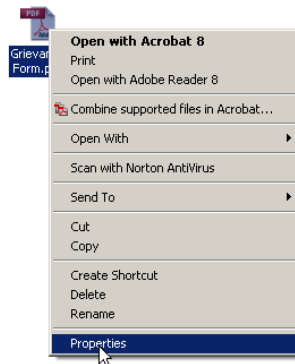
3. Make sure the Read-only box is checked. If not, click in the box to check it. Then click on OK.
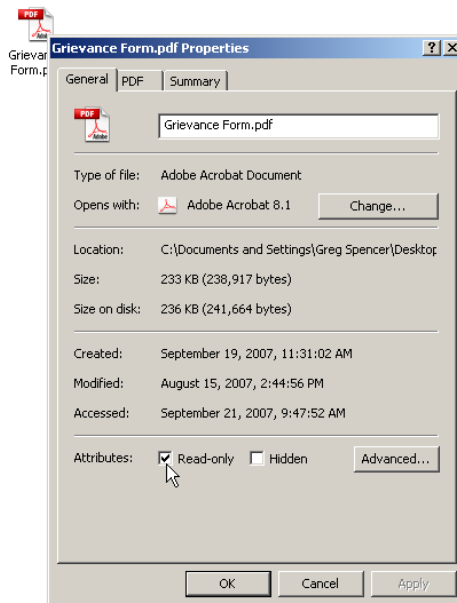

As long as the Read-only box is checked, the file will be protected against changes.

askSam Viewer Program

The askSam Viewer Version 7 program must be installed on your computer in order to open the grievance data file. it can be downloaded and installed from:

http://www.digifile.ca/caw2002files

When prompted enter the User name and Password included with the email sent announcing the new release of the grievance database.

At the prompt, enter the user name & password.
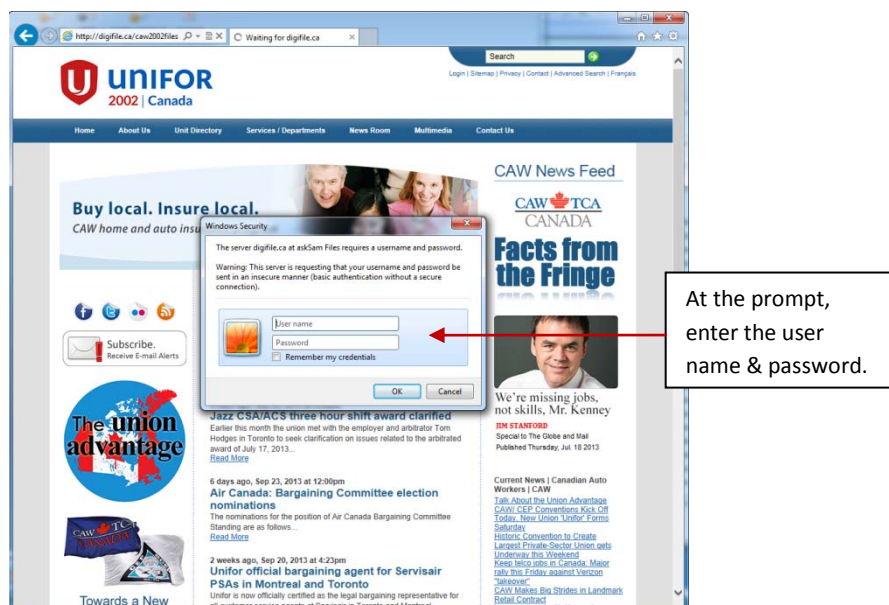
The next screen will list the files available for downloading. For example:
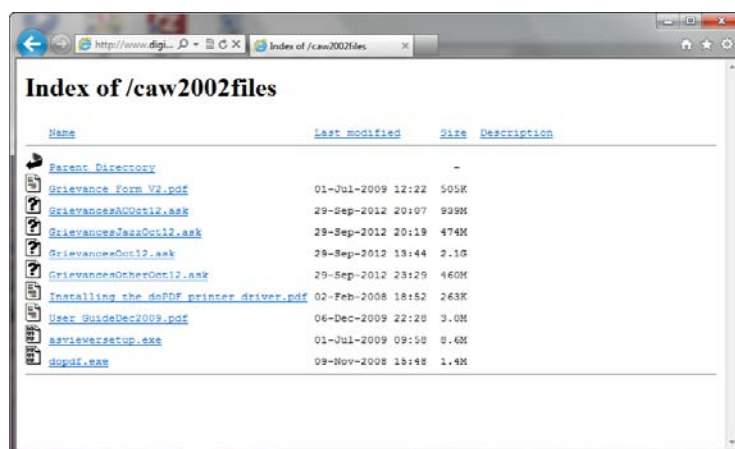
From here, click on asviewsetup.exe to start the download and then Save to designate where you want the file saved on your computer. Saving it to your Desktop will make it easy to find for the next step.

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Click on asviewsetup.exe to start the download

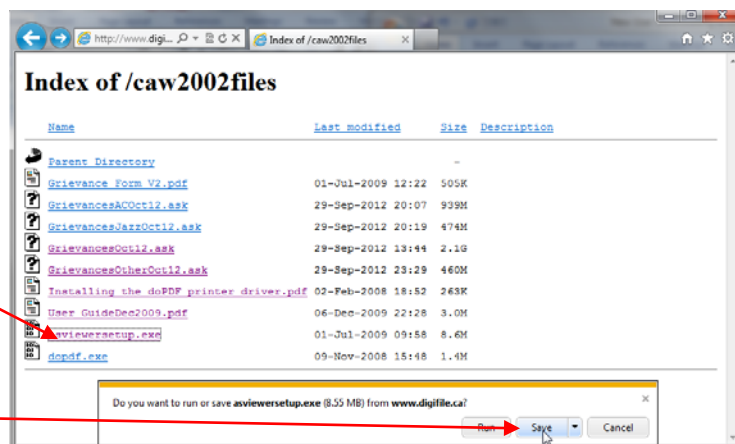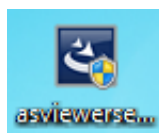**Then click on Save to save the file to your computer**
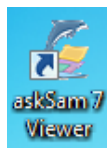
Once the download is complete, there will be an icon like this on your desktop:

Double-click on this icon to start the installation process. Follow the prompts from there to complete the installation.

Once the installation is complete, there may be a askSam Viewer icon on your desktop:

Since this icon is not necessary, you can delete it from your desktop if you wish. You can also delete the asviewsetup.exe file from your desktop.

Grievance Data File

This is the file where all of the grievance data is stored and you must have the askSam Viewer installed in order to open it. The file is usually updated quarterly and an email is sent out announcing the release. The email will include instructions on how to download the file over the internet and save it to your computer.

Associating the Grievances file with the askSam Viewer Program

If the Grievances icon looks like this:

instead of this:

you need to manually associate the Grievances file with the askSam Viewer program. You will only have to do this once.

Here are the steps to follow. The screenshots are from Windows 7 – other versions follow the same basic steps but the screen will look different than what's shown below:

1. After you've installed the file onto your computer, double-click on the Grievances icon, or on the shortcut icon you placed on your desktop.

2. You will get the response that Windows cannot open the file. Click on the dot next to Select the program from a list and then click OK.
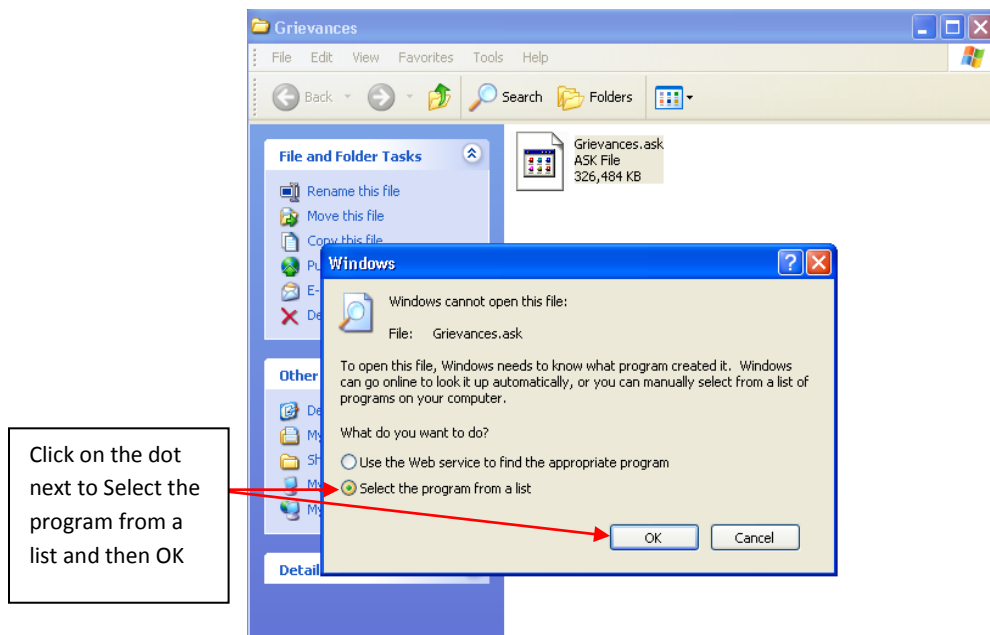
3. When the Open With dialog opens, click on Browse.
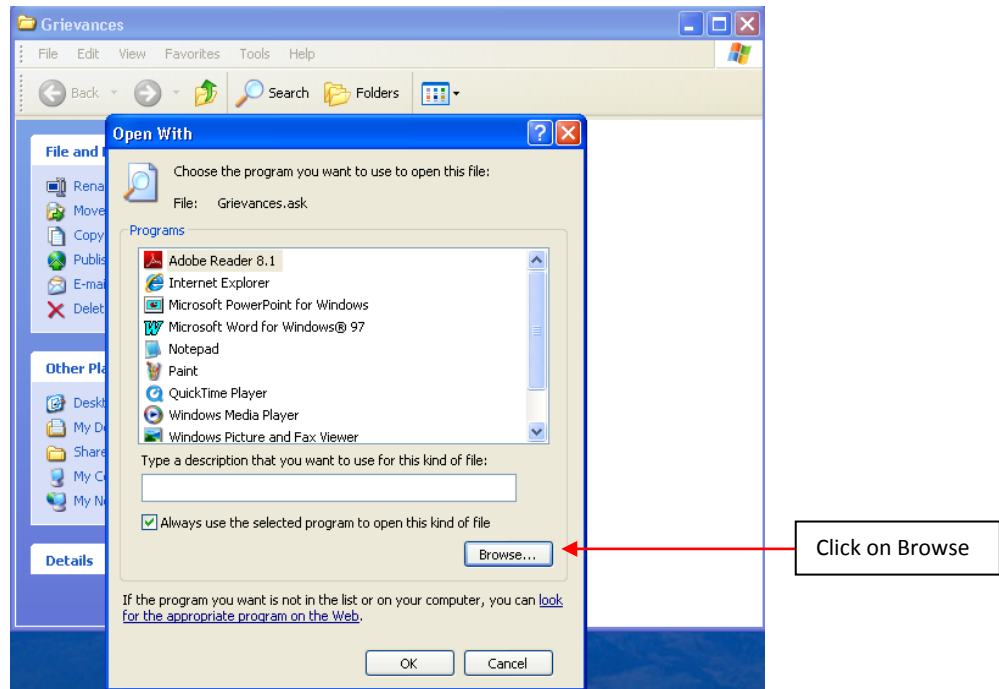
Click on Browse

4. At the next Open With dialog, double-click on the askSam Folder.

Double-click on the askSam folder
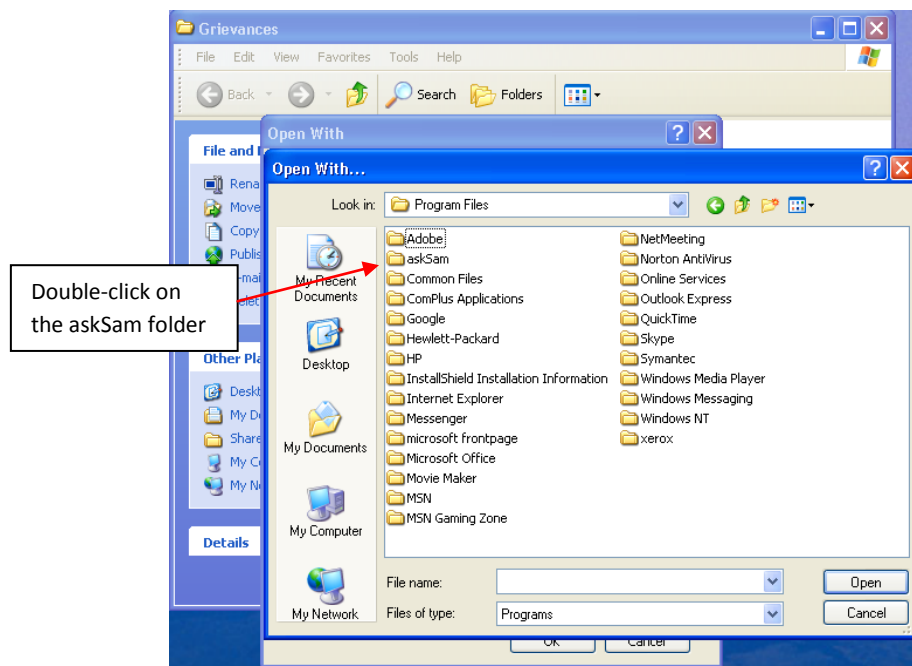
5. If you don't see the askSam folder, use the file browser to navigate to the Program Files (x86) folder & you'll find it there.
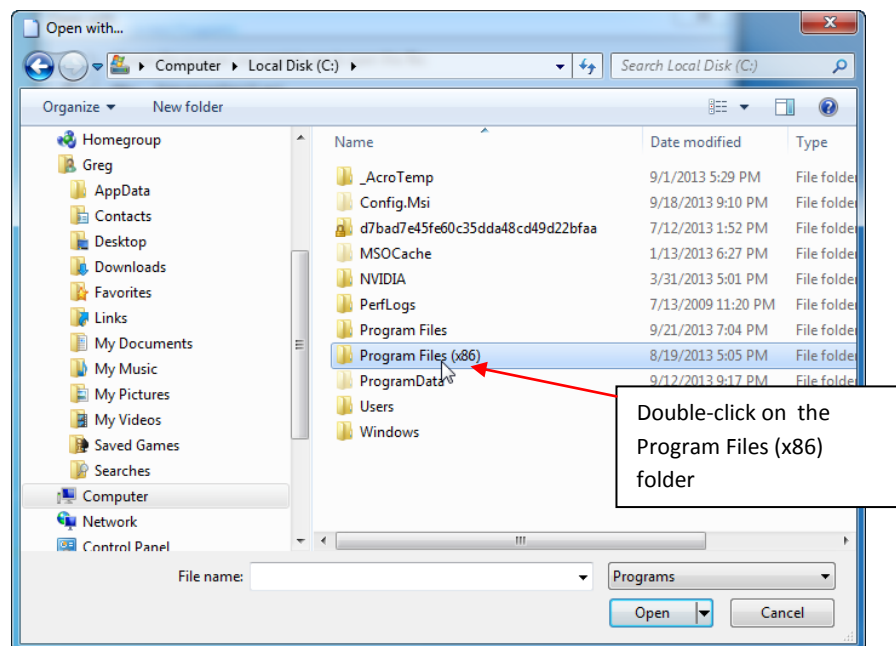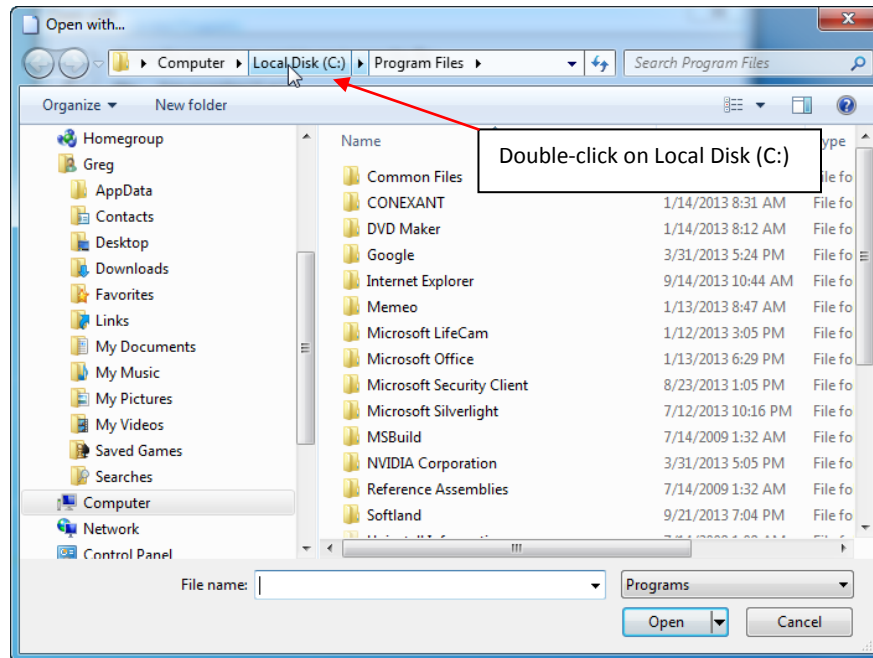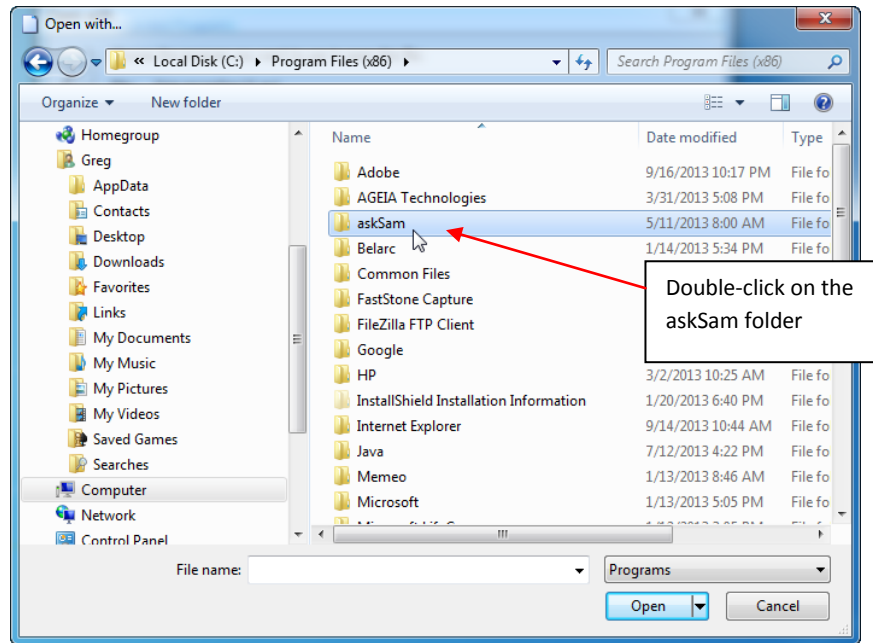
6. Once you've navigated to the askSam folder, double-click on the askSam 7 Viewer folder.
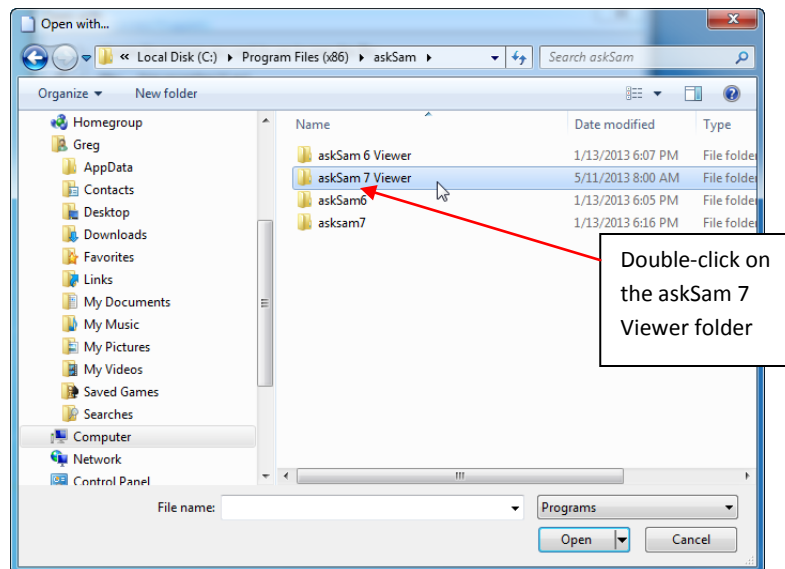
7. Make sure the ASViewer.exe icon is selected (as it is below) and then click on Open.

Make sure the ASViewer icon is selected.
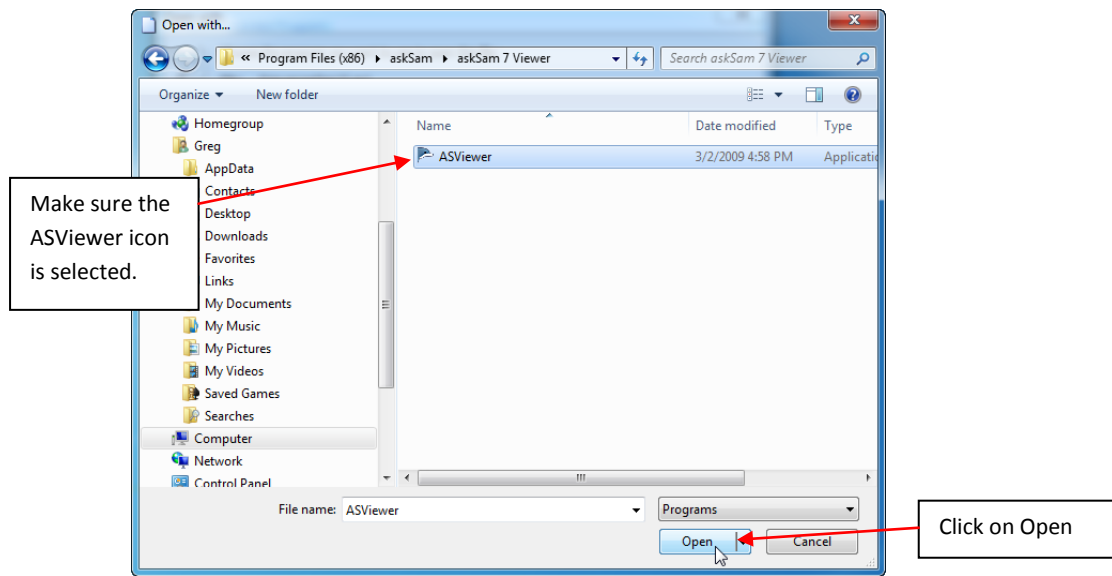
Click on Open

8. Make sure the askSam 7 icon is selected (as it is below) and click on OK.

Make sure the askSam 7 icon is selected.

Click on OK
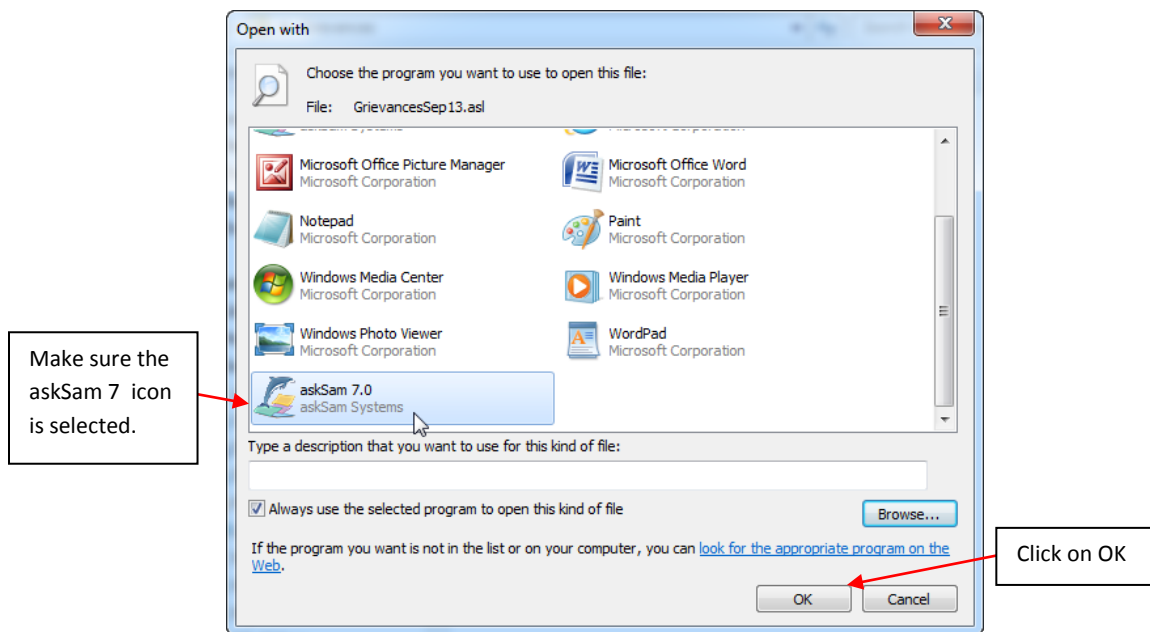
The Grievances file will now open in the askSam Viewer program.

doPDF Printer Driver

The doPDF printer driver allows the creation of PDF files using the print command in any application, be it word processing, spreadsheet or email.

You can use the doPDF printer driver to save a completed grievance form in a file that cannot be changed. This file can then be emailed to the company (or anyone else) without concern that it might subsequently be altered in some way.

The first step is to install the doPDF printer driver onto your computer. Once the installation process is started, the setup wizard will take you through the steps involved. The following describes these steps and how you can answer some of the prompts.

The doPDF-7.exe installation file from is available through the same link as for the askSam Viewer program and data files. Once the file has been downloaded onto your computer, go to the folder with the downloaded file and double-click on the doPDF icon to start the installation process.

dopdf-7

You will be asked to confirm that you want to run the file (click on Run to continue). You'll then be asked for the language you want the installation process to use and then you'll be taken to the Welcome screen. Click Next to continue.
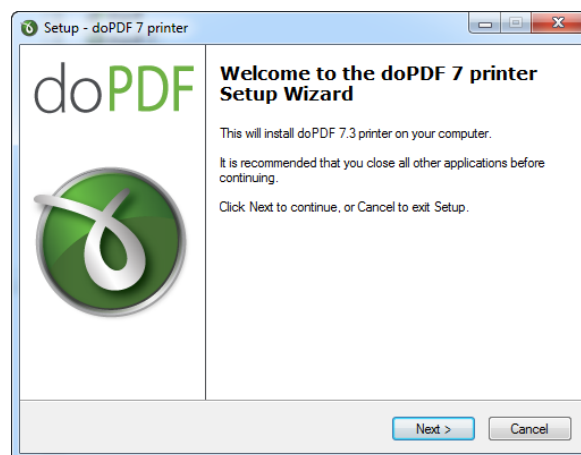

 The usual legal statement will come up. You can read it if you like, but you'll have to click on "I accept the agreement" and then Next to proceed to the next screen.

At the next screen you'll be asked to confirm which folder the printer will be installed in (the default location selected by the program is fine). You can also accept the default location for the Start Menu shortcut.

At the next screen you'll be asked "Do you want to select doPDF printer as the default printer?" – make sure that the checkmark is cleared. If there is a checkmark in the box, click on it to clear it. Then click the Next button.

Make sure this
box is empty
(not checked)
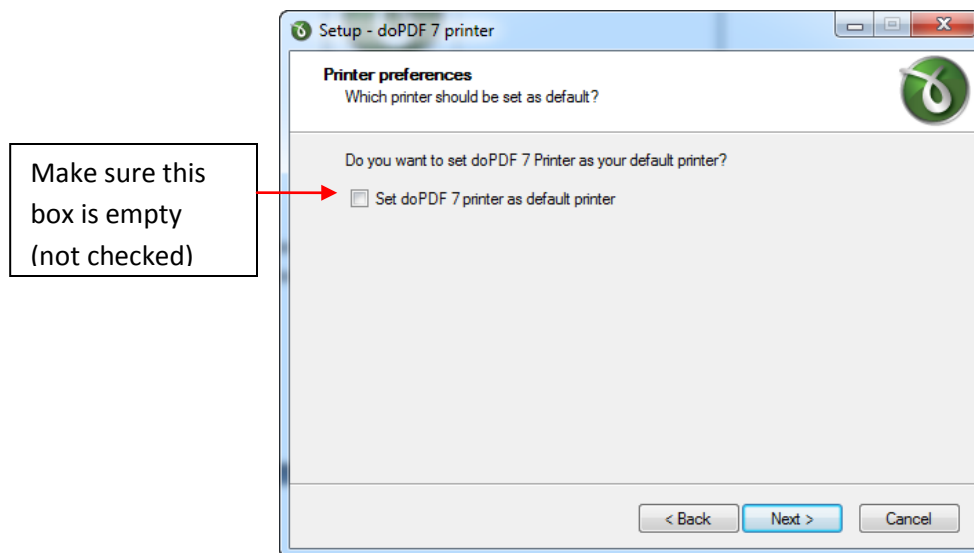
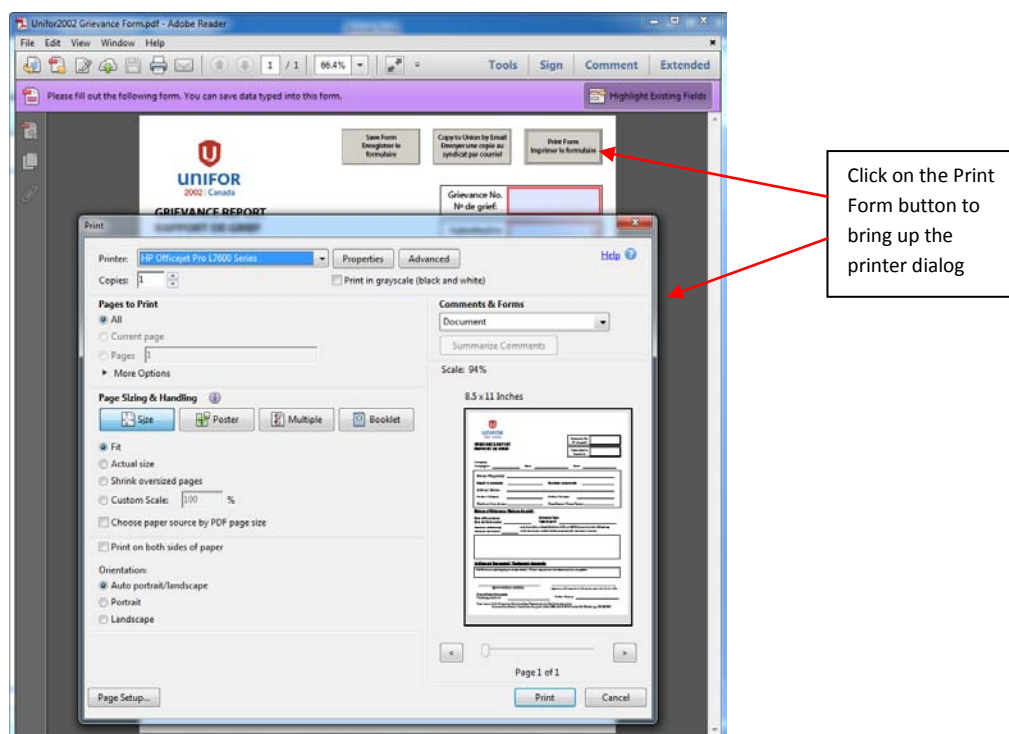At the Ready to Install screen, click on Install to complete the process.
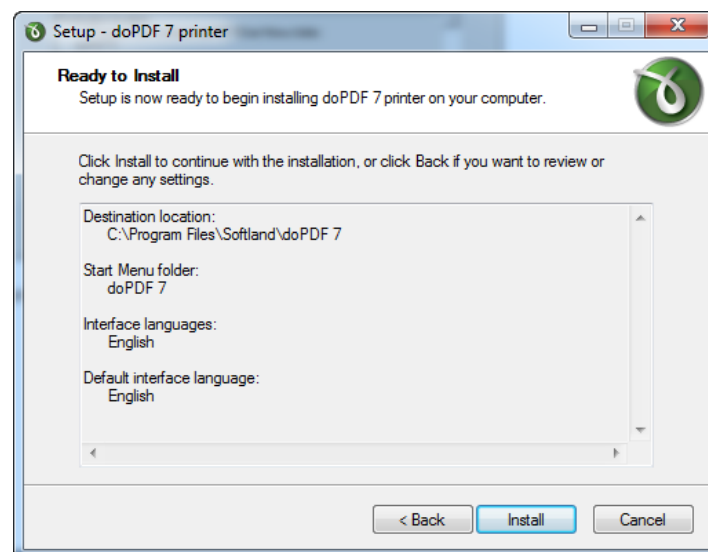
When the installation process is complete, you can delete the downloaded doPDF file from the folder it was saved in.
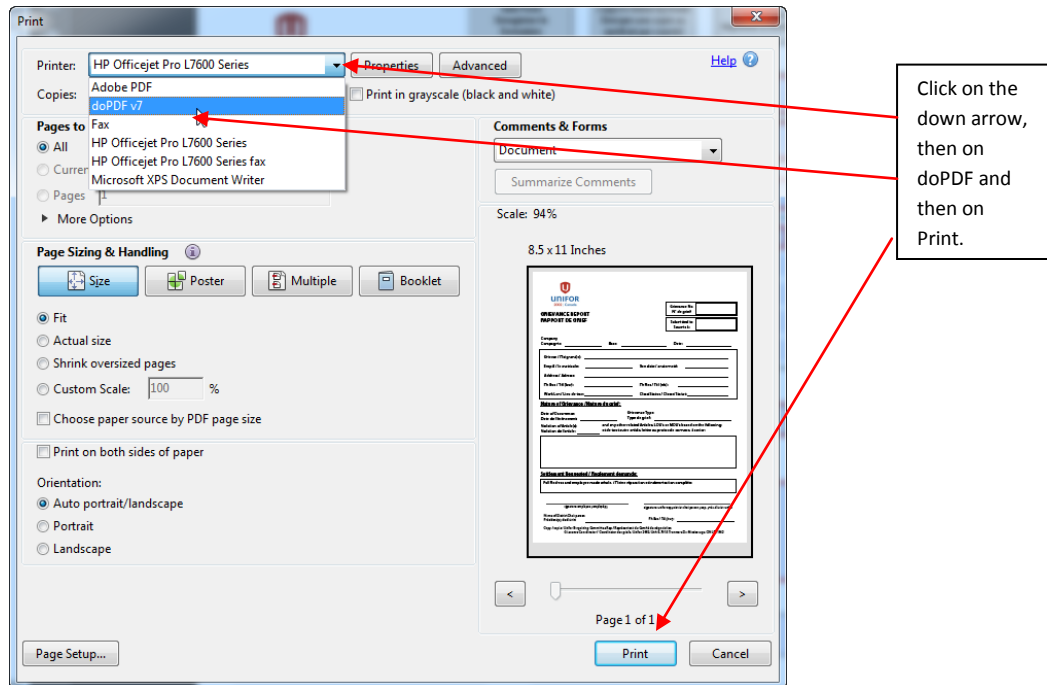
Creating an Adobe PDF file with doPDF

Once the doPDF printer is installed it can be used to create a PDF file of your completed grievance forms. The advantage of doing this is that the form is saved in a file that cannot be changed. This file can then be emailed to the company (or anyone else) without concern that it might subsequently be altered in some way.

To print a grievance to a PDF file using the doPDF printer driver, do the following:

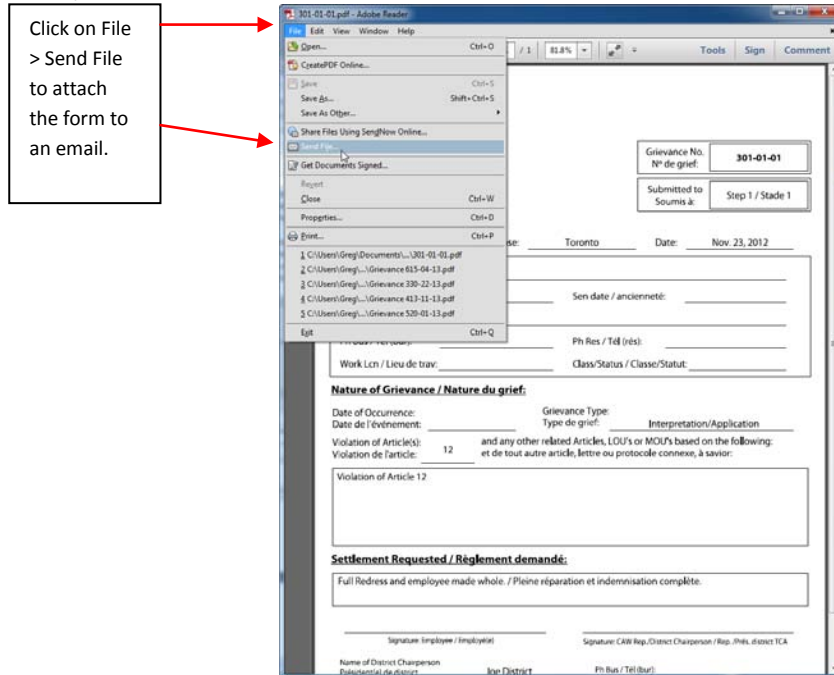1. Use Adobe Reader and the grievance form template to complete the grievance.

2. Click on the Print Form button on the form to bring up the printer dialog.

Click on the Print Form button to bring up the printer dialog

3. Click on the down arrow to the right of the printer name to bring up the list of printers installed on your computer. Click on doPDF to select it as the Printer to be used for printing the form. Click OK.

Click on the down arrow, then on doPDF and then on Print.

4. At the next prompt, click on Browse, select the folder where you want to save the file and type in the name of the file in the File Name box. Click on OK to continue. You will have to give the file a name that is different from the name of the file you are printing from.

5. Adobe Reader will reopen and show you the newly created PDF file. To email the form, click on File/Send File:

Click on File > Send File to attach the form to an email.

If you want to print a hard copy, click on the printer icon to bring up the print dialog. If the doPDF printer is still shown in the printer name box, click on the down arrow and choose your regular printer.

Click on the printer icon to print a hard copy.

If doPDF is still shown in the printer name box, click the down arrow and choose your regular printer.