

UAT Guide – Release #21, Cycle 1- Reports

Reports – Provider Management

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Overview

This guide directs stakeholders through the User Acceptance Testing (UAT) for **IWDS 2.0 Release 21, Cycle 1 Reports**. The upgraded reporting module features an automated data-rendering workflow: once query filters are configured and applied, the system dynamically populates a standardized set of default data fields. Testers should utilize these criteria to validate report outputs against intended business logic and design specifications. Reports are listed on the reports landing page.

UAT Release #21 – Reports / Cycle 1 Expectations & Homework

Homework Areas

Navigate to test each of the following public-facing pages:

- **Reports Landing Page**
 - Navigate Report Search Filters
 - Navigate Name Expansion Chevrons (View Description, Report Data, Filter Criteria, Grouping and Aggregation, and Available Views)
- Navigate Sorters & Filters / Summary Cards / Pagination
 - Run Reports / Custom Run Reports / Report Parameters / Export Button
 - View Data Fields
- **Provider Management Category**

*Note: This User Acceptance Testing (UAT) assignment focuses **exclusively** on **Provider Management reports**. Be sure to review all components of the reports listed below. Document any required modifications, missing fields, questions, or general feedback/concerns.*

- Report- [Detail LWIA-Provider Relationship](#)
- Report- [Detail Service Provider Registration](#)
- Report- [Detail Training Provider Entity](#)
- Report- [New Certified Training Programs](#)
- Report- [Training Programs by Status](#)
- Report- [Training Programs Nearing \(or Past\) Recertification Date](#)

For this UAT cycle, tasks will focus on the following key areas:

- **Visual Review** – Review each page for layout, design consistency, and image quality
- **Description** – Verify that the description accurately reflects the details
- **Report Data** – Check for correct data field input
- **Filter Criteria** – Validate query parameters for proper filtering
- **Responsive Design** – If possible, test pages at different screen sizes (desktop, tablet, mobile)
- **Content Accuracy** – Verify text content matches the approved requirements

Due Date

Please complete your testing in these areas and submit your feedback by **EOD on Thursday, June 4th**. This will give us an opportunity to address any issues prior to the next release.

Access to UAT Environment

To access the pages for testing in your browser, follow the link provided here: [UAT Release #21 Cycle 1 - Provider Management Reports](#)

Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our shared notebook [UAT #21 Cycle 1 - Reports](#). The main purpose of using a shared notebook is for collaboration between members of the UAT team and Business Analysts. This will cut down on duplicate issues being reported.

When logging your entries:

- Document issues as you complete your UAT work
 - Be concise but detailed
 - Log each issue separately for clarity
 - Add your name/initials and date to each entry
 - Include screenshots when possible
- **If you have issues accessing the OneNote notebook-** Please contact one of the Business Analysts (BA) on the team. The business analysts are:
 - Laura Menke- laura.menke@siu.edu
 - Andi Grabemeyer- andi.grabemeyer@siu.edu
 - Al Menke- al.menke@siu.edu
 - Kelly Trimble- kelly.trimble@siu.edu
 - Lynette Tritz - lynette.tritz@siu.edu
 - Olivia Miller- olivia.miller@siu.edu

Expectations for UAT

As you test these areas, please keep in mind the following best practices:

- **Test Thoroughly:** Ensure that you navigate through all functions and features within these areas. Pay attention to any discrepancies between expected and actual results. Please explain your expected results and the actual results you found.
- **Detail-Oriented:** When reporting issues, provide as much context as possible, including:

- Steps to reproduce the issue
 - Screenshots or recordings, if possible
 - Browser or device used during testing
 - Actual outcome vs. Expected outcome
- **Feedback Categories** – The SIU team will categorize your findings into three (3) possible classifications.
 - **Bugs**- When the system does not perform as expected, and the system is not performing according to the requirements, then a bug will be reported, tracked, fixed, and retested.
 - **Issues**- If the system is performing according to the requirements, but the user feels that the requirement was not captured correctly or now the user feels like the requirement is just not working as expected, then this is recorded as an issue. Issues are tracked and prioritized for change.
 - **Enhancements**- Once we are in UAT and the users recognize an area that could be improved, then this will be also logged as an issue and tagged as an enhancement.

Best Practices for Effective UAT

- **Think like the end user:** Approach your testing from the perspective of someone unfamiliar with the system. This will help us identify usability issues and areas for improvement.
- **Be specific and thorough:** The more specific your feedback, the easier it will be to address. Include specific steps, expected outcomes, and actual results.
- **Provide context:** Always give context for your feedback. For instance, explain why an enhancement would improve the user experience or system performance.

By following these guidelines and providing detailed feedback, you're helping to ensure the final product meets user expectations and performs as intended.

Purpose of the Reports

The purpose of IWDS 2.0 reports is to provide comprehensive, data-driven insights across all areas of workforce administration, enabling users to easily track performance, manage compliance, and analyze system data. To ensure efficient navigation, the reports are organized into twelve distinct categories:

- Data Extract
- Data Lag
- Federal
- Grants
- Participant
- Performance Management
- Provider Management
- Resource Room/Referral Tracking

- Security
- Summary
- TAA
- TAA Monitoring

Within each category, individual reports feature customizable queries that allow you to isolate the exact data fields you need, with options to instantly view the results on-screen or export them for external analysis.

Navigation of the Reports Landing Page

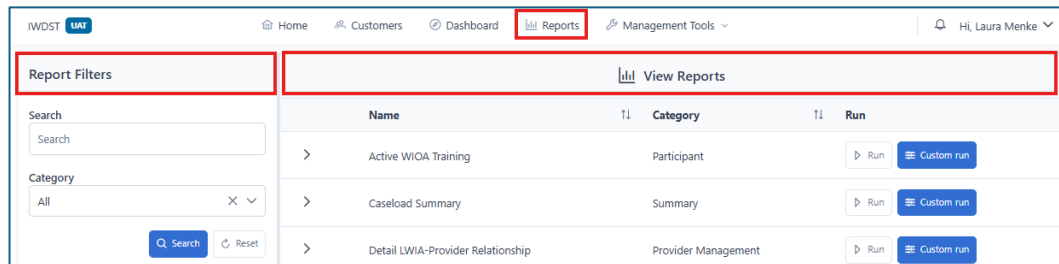
The Reports landing page in IWDS 2.0 UI utilizes a streamlined, **two-panel workspace** designed for efficient report navigation and retrieval. When you open the page, it automatically loads a comprehensive, split-screen interface:

- **Left Panel (Report Filters):** A dedicated search and filter panel used to quickly narrow down data options and execute targeted queries.
- **Right Panel (View Reports):** The main display list, which automatically loads the first full page of available reports upon arrival for immediate visibility.

This dual-panel layout allows you to easily manage, filter, and browse your reports from a single, intuitive screen.

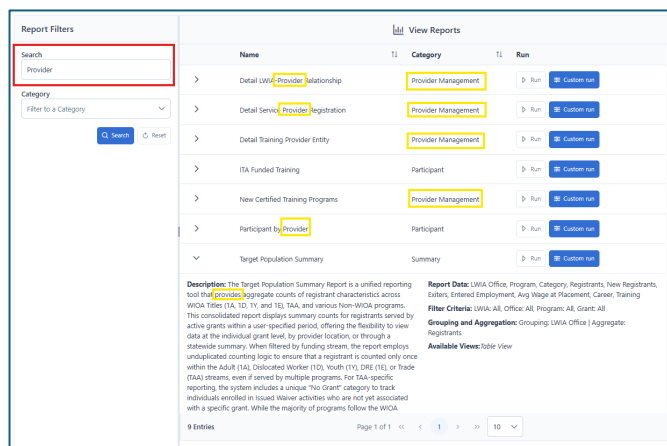
Navigating Report Search Filters

1. Use the top menu bar and select **Reports**.



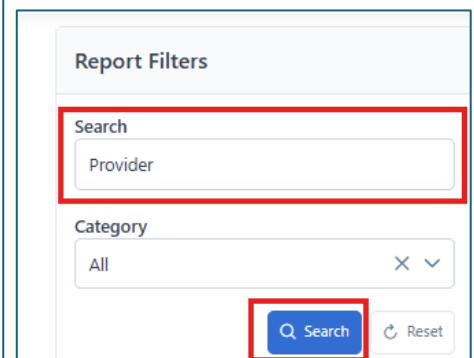
***Note:** You can filter by using the Report Filters or the View Reports Area.*

2. Click into the **Search** field and type in a keyword (e.g., Provider).



3. Click the **Search** button.

***Note:** Entering keywords into the Search field performs a comprehensive search across all report*



attributes, including the Name, Category, Description, Report Data, etc.

4. Click the **Reset** button to clear all applied filters and restore the default view.

Name	Category	Run
> Active WIOA Training	Participant	Run Custom run
> Caseload Summary	Summary	Run Custom run
> Detail LWIA-Provider Relationship	Provider Management	Run Custom run
> Detail Service Provider Registration	Provider Management	Run Custom run
> Detail Training Provider Entity	Provider Management	Run Custom run
> IEBS Customer Listing	Participant	Run Custom run
> ITA Funded Training	Participant	Run Custom run
> New Certified Training Programs	Provider Management	Run Custom run
> Participant by Employment	Participant	Run Custom run
> Participant by Grant	Grant	Run Custom run

5. Click the **Category** dropdown and select **Participant**.

6. Click the **Search** button.

Note: The *View Reports* panel will update to display only the reports

categorized under "Participant".

Name	Category	Run
> Active WIOA Training	Participant	Run Custom run
> IEBS Customer Listing	Participant	Run Custom run
> ITA Funded Training	Participant	Run Custom run
> Participant by Employment	Participant	Run Custom run
> Participant by Provider	Participant	Run Custom run
> Participants Exceeded Training Limit	Participant	Run Custom run
> UI Profilee	Participant	Run Custom run
> Wage Analysis	Participant	Run Custom run
> WIOA Co-Enrolled in LWIA 90	Participant	Run Custom run
> WIOA Exters	Participant	Run Custom run

7. Click the **Reset** button

*Note: Clicking the **Reset** button will clear this selection, automatically returning the View Reports panel to display "All" reports.*

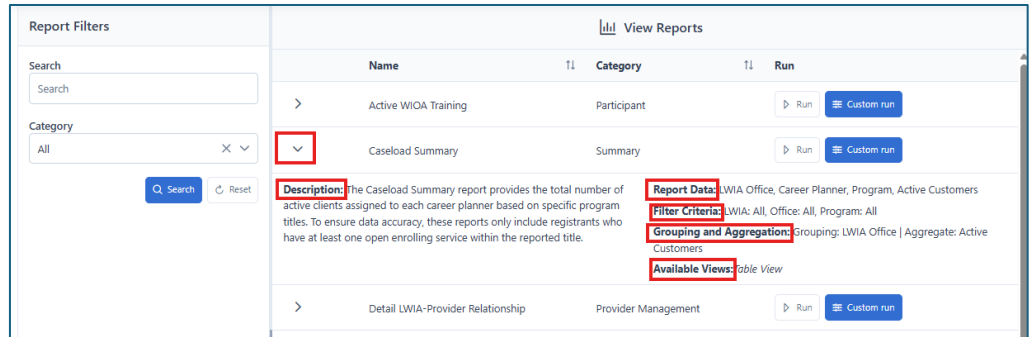
Name	Category	Run
> Active WIOA Training	Participant	Run Custom run
> Caseload Summary	Summary	Run Custom run
> Detail LWIA-Provider Relationship	Provider Management	Run Custom run
> Detail Service Provider Registration	Provider Management	Run Custom run
> Detail Training Provider Entity	Provider Management	Run Custom run
> IEBS Customer Listing	Participant	Run Custom run
> ITA Funded Training	Participant	Run Custom run
> New Certified Training Programs	Provider Management	Run Custom run
> Participant by Employment	Participant	Run Custom run
> Participant by Grant	Grant	Run Custom run

Navigate Name Expansion Chevrons

Each report on the landing page features an interactive chevron that allows you to dive deeper into a report's specific configurations without leaving the main list. Use the following steps to open the expanded layout, verify the underlying documentation, and collapse the view when finished.

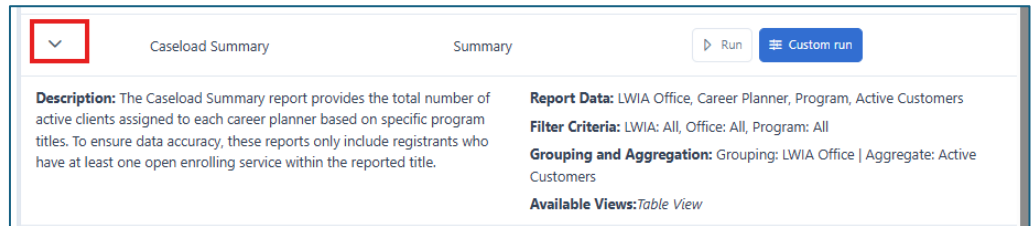
1. Click the **expansion chevron** next to the Report Name.

Note: The expansion area shows the report Description, Report Data, Filter Criteria, Grouping & Aggregation, and the Available Views.

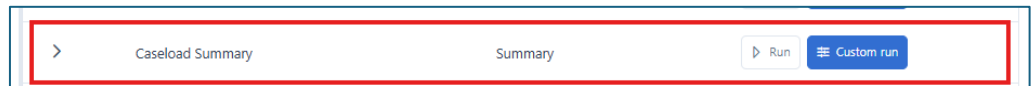


2. Review the expanded details (Description, Report Data, Filter Criteria, Grouping/Aggregation, and Available Views).

Note: Ensure all expanded detail items (above) are thoroughly proofed and accurate for the specific report selected.



3. Close the **expansion chevron** to return to the default view.



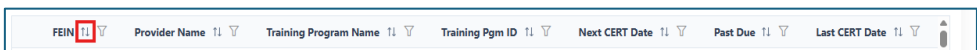
Navigate Sorters and Filters / Summary Cards / Pagination

The three column headers (Name, Category, and Run) in the **View Reports** panel features sorting capabilities, allowing you to arrange the list in ascending or descending order. The top of the report page features a **Summary row** made up of *quick-reference cards*. Use the **Pagination Bar** at the bottom of the view reports panel to track your results and navigate through multiple pages. The list defaults to **10 entries per page**, which can be customized using the dropdown menu on the right. Navigate between pages using the directional arrows or view the total record count on the left.

1. Click on the **Report Name**, "Training Programs Nearing (or Past) Recertification Date."

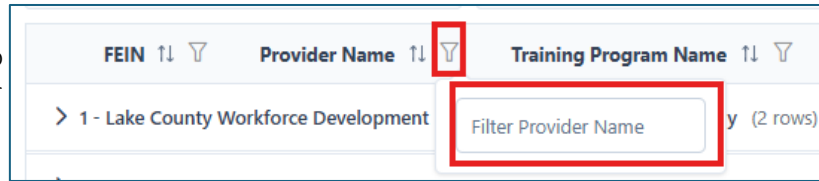


2. You can sort the report by selecting a sorter icon or the column header. Click on one of the Data Field **Sort Icons** to ascend or descend the view.



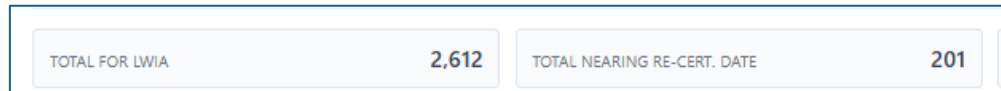
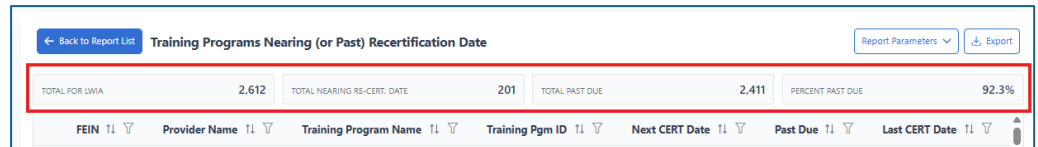
3. You can filter all rows in the report using Filter rows input

field. Click on one of the Data Field **Filters** and type a word into the field and the report will filter that word.

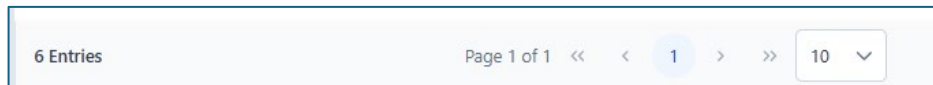


Note: The top of the report page features a row of **Summary Cards** that are specific to each report and load automatically.

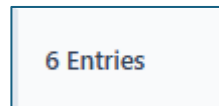
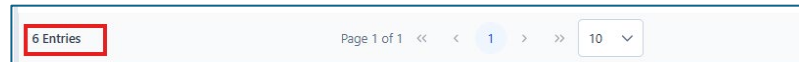
Note: A close-up example for viewing (showing 2 of the 4 in the above screen shot).



4. **Pagination Bar** at the bottom of the "View Reports" page splits your reports into manageable pages, defaulting to show 10 items per page with navigation links to view the rest.



Note: Located on the left, the entry display identifies the total volume of reports within that specific category, so you always know the full count. i.e., (6) Entries



Run Reports / Custom Run Reports / Report Parameters / Export

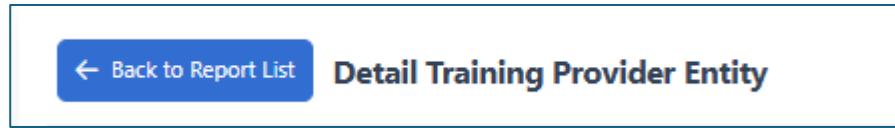
Users can execute reports from the **View Reports** panel in two ways: via the **Run Report** button for an immediate launch using default data fields, or via the **Custom Run** button, which launches a pop-up modal (e.g., *Run: Detail LWIA-Provider Relationship*) for targeted parameter adjustments.

1. To run the report, you use one of two buttons. Click the **Run Button** on any Provider Management Report.



Note: The Run Button will run the report with the default selection criteria.

2. Back to Report List Button



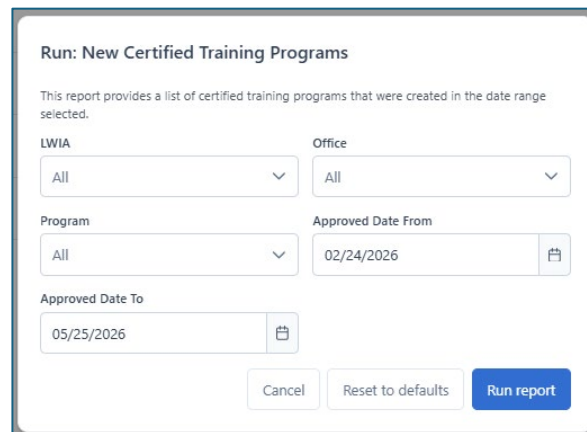
3. Click the Custom Run Button.



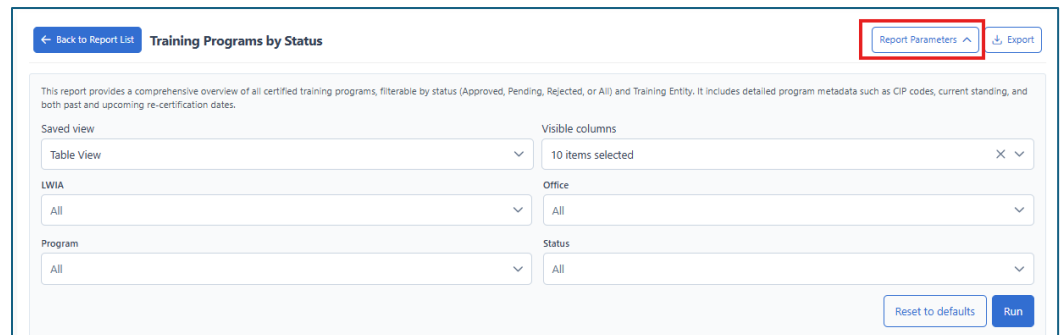
Note: The Custom Run Button will provide a Popup window to set up custom criteria. Each modal is specific to individual reports.

3. Pop-Up Modal

- LWIA
- Office
- Program
- Approved Date From
- Approved Date To
- Cancel/Reset/Run Report

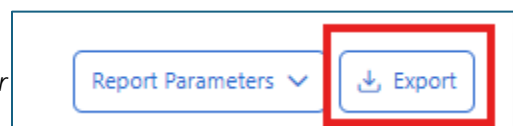


4. Click the Report Parameters button to see the specific rules, filters, or values that a user selected before running a report to customize and limit the data that is displayed.



5. Click the Export Button

Note: The Export button allows you to download the report's data and save it directly to your computer in a portable file format (such as an Excel)



spreadsheet) so you can view, print, or analyze it outside of the system.

View Data Fields

Each report features a standardized set of default data fields. These columns populate automatically once you configure and apply your desired query filters.

1. Report Title
2. Office Name
3. Data Fields
4. Chevrons
4. Report Parameters
5. Export Button
6. Back to Report List Button

FEIN	Provider Name	Training Program Name	Training Pgm ID	CIP	Current Status	Next Cert. Date
0 - DCEO Main Campus (1 rows)						
0 - DCEO Northwestern Memorial Healthcare (1 rows)						
36-3152959	Northwestern Memorial HealthCare	Medical Assistant	28994	51.0899	Approved	03/24/2027
1 - Lake County Workforce Development Department 160 Driving Academy (6 rows)						

Program Name	Training Pgm ID	CIP	Current Status	Next Cert. Date	Last Cert. Date	Reject Date	Reject Reason
nt	28994	51.0899	Approved	03/24/2027	03/18/2025		
emy (6 rows)							
College Inc (18 rows)							

Provider Management Category Reports (Six)

Note: For this UAT assignment, please focus **only** on the **Provider Management reports**. Review each report's layout and data thoroughly, and be sure to call out any modifications, missing elements, questions, or concerns you identify.

Report Filters

Search

Category
Provider Management
✕ ▾

Search
Reset

[View Reports](#)

	Name	Category	Run
>	Detail LWIA-Provider Relationship	Provider Management	▷ Run Custom run
>	Detail Service Provider Registration	Provider Management	▷ Run Custom run
>	Detail Training Provider Entity	Provider Management	▷ Run Custom run
>	New Certified Training Programs	Provider Management	▷ Run Custom run
>	Training Programs by Status	Provider Management	▷ Run Custom run
▾	Training Programs Nearing (or Past) Recertification Date	Provider Management	▷ Run Custom run

Description: This report provides a list of certified training programs that are 30 days or less from their mandatory Recertification date. It also lists programs that are past their recertification date.

Report Data: LWIA Office, FEIN, Provider Name, Training Program Name, Training Pgm ID, Next CERT Date, Past Due, Last CERT Date

Filter Criteria: LWIA: All, Office: All, Program: All

Grouping and Aggregation: Grouping: LWIA Office | Aggregate: Training Pgm ID

Available Views: Table View

6 Entries
Page 1 of 1 << < 1 > >>
10 ▾