UAT Guide – Release #26

Reports: General Navigation and Provider Management (Category) Reports

Contents

Overview 1
UAT Release #26 – Reports Expectations & Homework 2
Homework Areas 2
Navigate to test each of the following public-facing pages: 2
For this UAT cycle, tasks will focus on the following key areas: 2
Due Date 3
Access to UAT Environment 3
Reporting Issues 3
Expectations for UAT 4
Best Practices for Effective UAT 4
Purpose of the Reports 5
Navigation of the Reports Landing Page 5
Navigating Report Search Filters 6
Navigate Name Expansion Chevrons 10
Navigate to Report Parameters – RUN Report 11
Navigate Sorters and Filters / Summary Cards 13
Navigate to Export 14
Provider Management Category Reports (Eight) 17

Overview

This guide directs stakeholders through the User Acceptance Testing (UAT) for **IWDS 2.0 Release 26 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 #26 – Reports Expectations & Homework

Homework Areas

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

- **Reports Landing Page**
  - Navigate Search Report Filters: ***Left Panel*** (Search and Category fields, Search & Reset buttons)
  - Navigate View Report: ***Right Panel*** (Name Expansion Chevrons, View Description, Report Data, Filter Criteria, Grouping and Aggregation, and Report Formats)
- **Reports Navigation**
  - Parameters / Run Reports / Sorters / Summary Cards / Export
  - Run and Review Provider Management Reports
- **Provider Management Category**

Note: *This User Acceptance Testing (UAT) assignment focuses* ***exclusively*** *on* ***UI Navigation*** *and* ***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- Eligible Training Provider List (ETPL)
- Report- Existing RAPs Expanded
- 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, August 27. *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 #26 – Reports: UI Navigation / Provider Management

Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our *shared notebook* UAT Release #26 - 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) or Managers on the team:
  - Laura Menke - laura.menke@siu.edu (BA)
  - Al Menke - al.menke@siu.edu (Project Manager)
  - Kelly Trimble **-** kelly.trimble@siu.edu (Outreach Manager)
  - Lynette Tritz - lynette.tritz@siu.edu (BA)
  - Olivia Miller - olivia.miller@siu.edu (Product Manager)
  - Robert Kelch - robert.kelch@siu.edu (BA)

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:

- CCWP
- Data Extract
- Data Lag
- Federal
- Grants
- Participant
- Performance Management
- **Provider Management**
- Resource Room/Referral Tracking
- Sector Summary
- Security
- Summary
- TAA
- TAA Monitoring

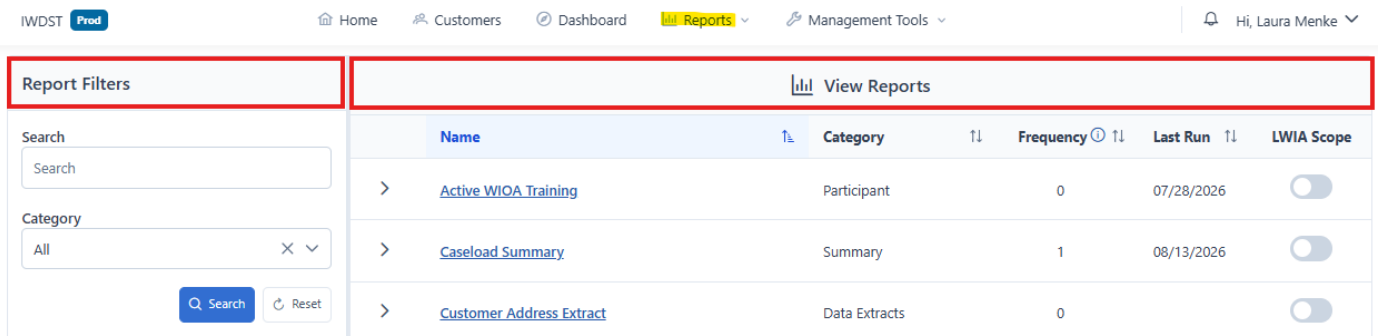
Within each category, individual reports feature customizable queries that allow you to isolate the exact data fields you need, with options to instantly view the results on-screen or export them for external analysis.

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:

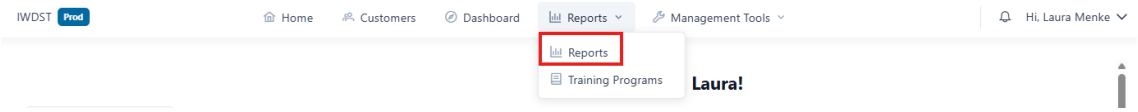
- **Left Panel (Report Filters):** A dedicated search and filter panel used to quickly narrow down data options and execute targeted queries.
- **Right Panel (View Reports):** The main display list, which automatically loads the first full page of available reports upon arrival for immediate visibility;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

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

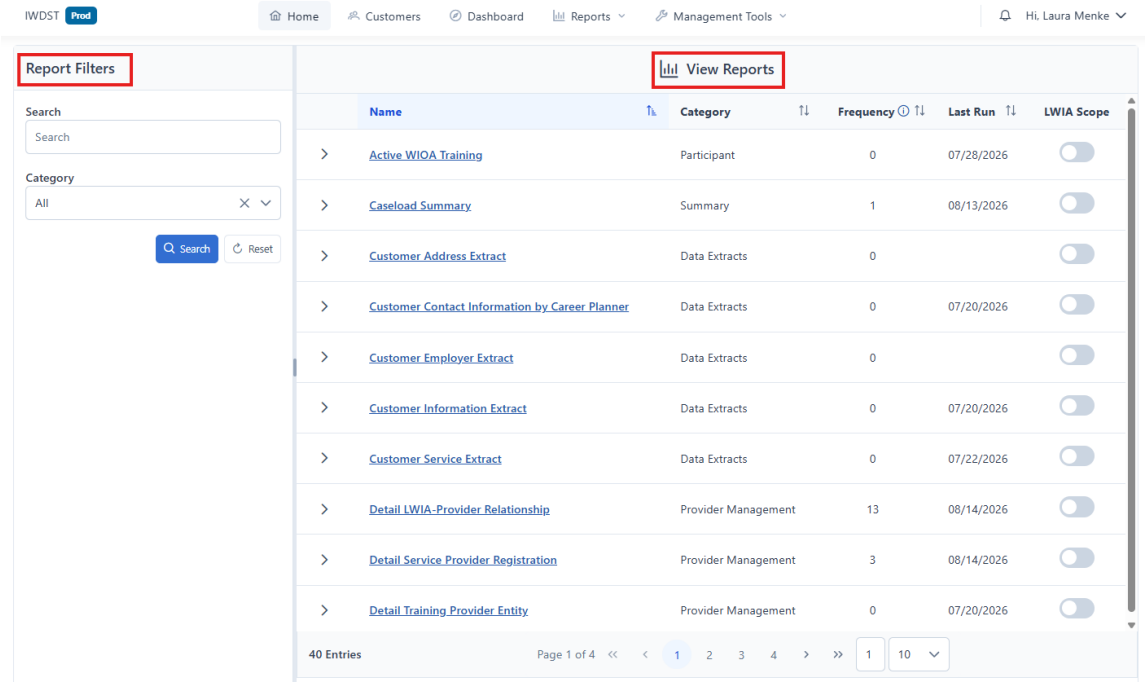


Navigating Report Search Filters

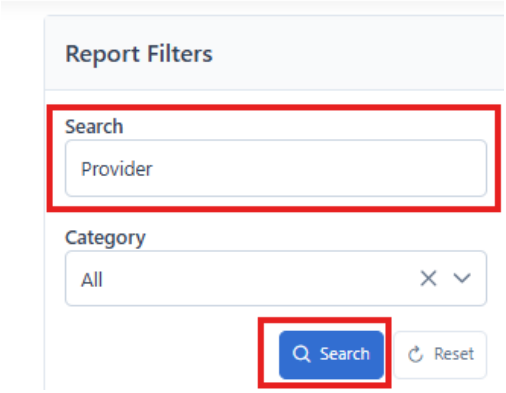
1. Use the top menu bar and select **Reports**.



Note: *Two-Panel Landing Page*

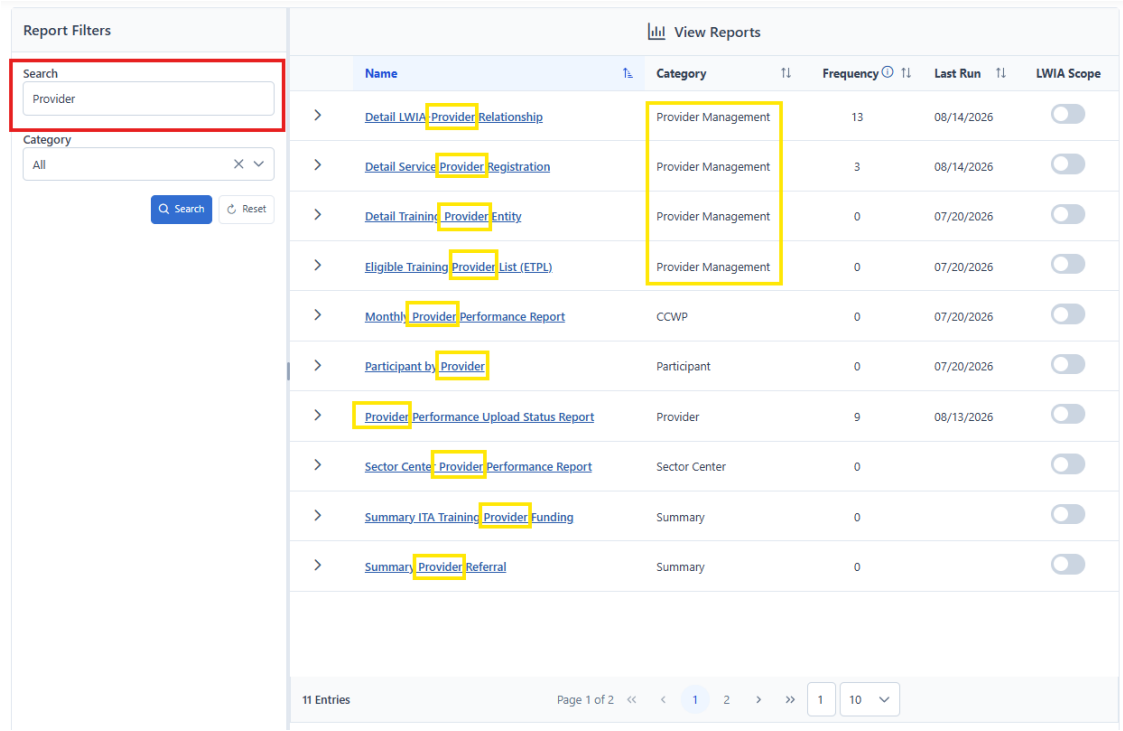


2. Click into the **Search field** (Left Panel) and type in a keyword (e.g., **Provider**).

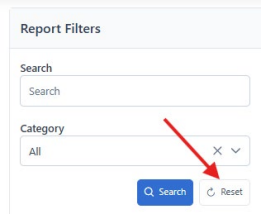


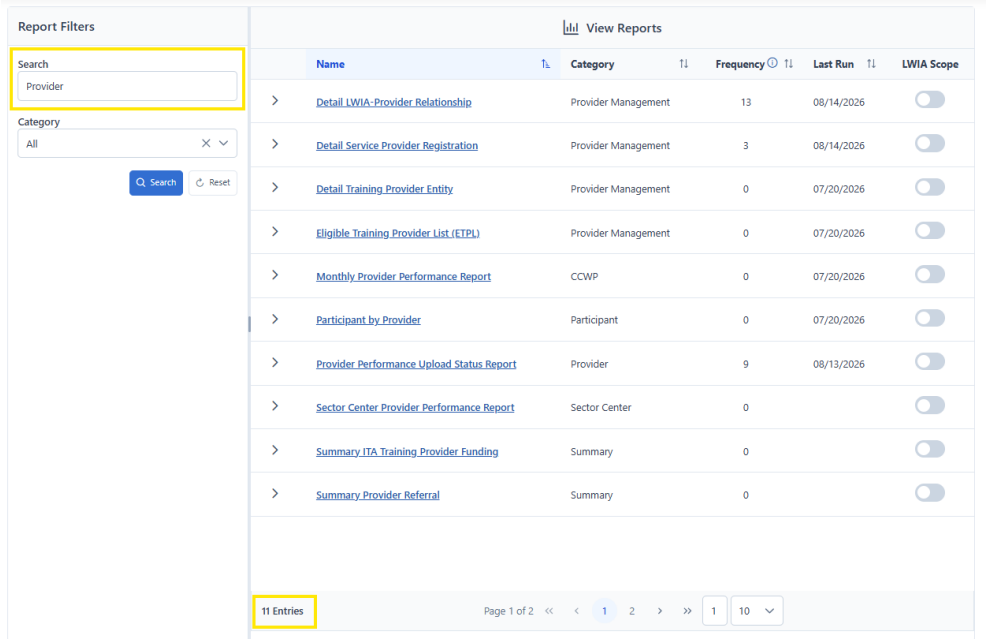
3. Click the **Search button.**

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 (**Provider**) and restore the default view (**All**).



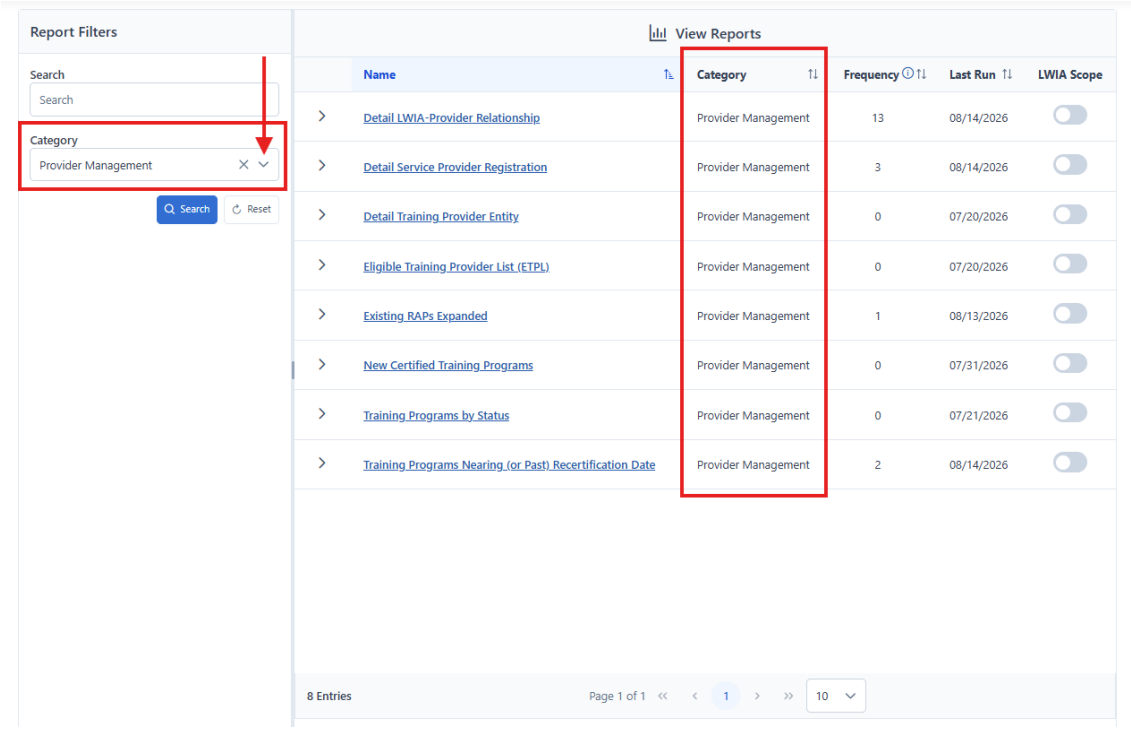


5. Click the **Category** dropdown and select **Provider Management.**

6. Click the **Search** button.

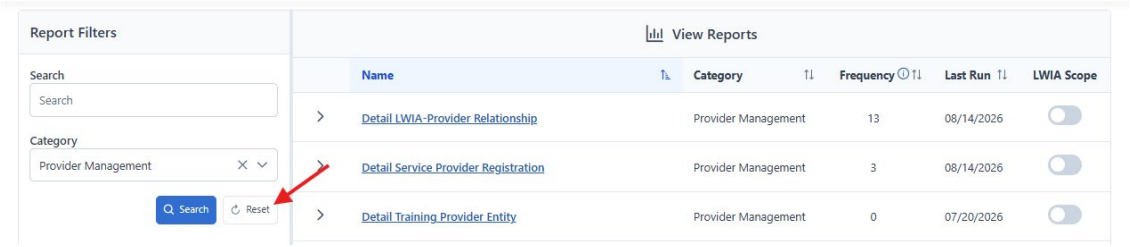
Note: The *View Reports* panel will update to display only the reports categorized under

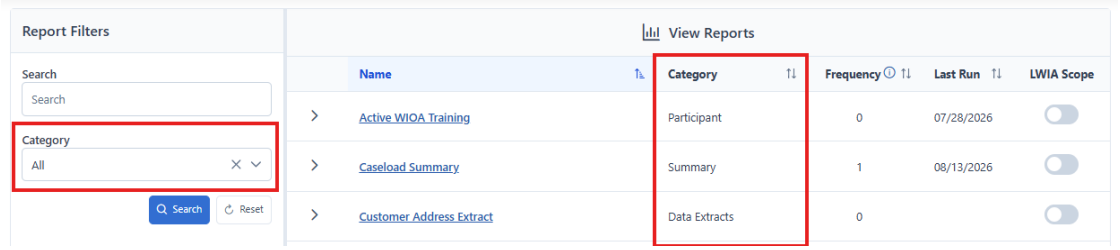
"Provider Management".



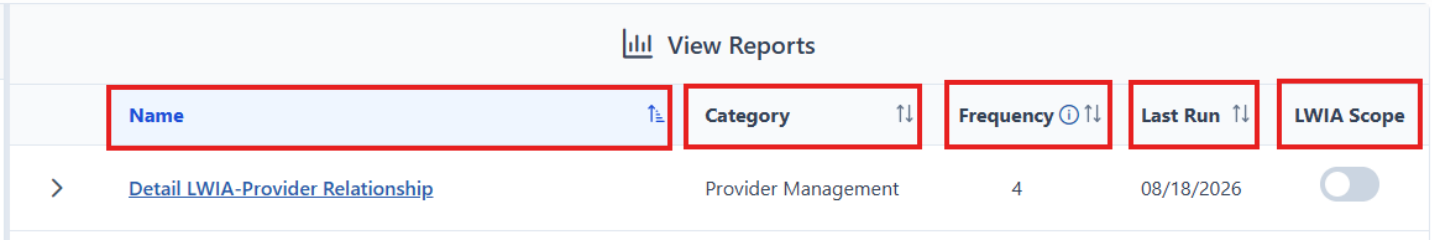
7. Click the **Reset button**

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





8. Get familiar with the **View Reports** (Right Panel of Reports Landing Page) **shown below**.



- Name / Sorter icon
    a. Click on any report **Name** link to open its **Report Parameters** page and customize filters.
    b. Select the **chevron** (>) next to a report name to **view** its Description, Report Data, Filter Criteria, Grouping & Aggregation, and Report Formats.
    c. Sorts table rows alphabetically (A–Z / Z–A) by report.
    d. Interactive column header is used to sort items in ascending or descending order by Name.
- Category / Sorter Icon
    a. The **Category** field indicates the classification assigned to each report
    b. Interactive column header is used to sort items in ascending or descending order by Category.
- Frequency (Info Bubble) / Sorter Icon
    a. The Frequency is the number of times the report has been ran this month.
    b. Interactive column header is used to sort items in ascending or descending order by Frequency.
- Last Run / Sorter Icon
    a. The **Last Run** column records the timestamp of the report's most recent run.
    b. Interactive column header is used to sort items in ascending or descending order by Date.
- LWIA Scope
    a. The LWIA Scope is an on/off switch that can be set per report by an administrator from the reports list. It controls whether users see data for every LWIA or only for the LWIAs they are assigned to.
        i. When it is **ON**
            1. Users see ONLY the LWIAs assigned to them on their user account.
            2. Some users are not restricted and always see every LWIA; Super User, Data Steward, Development Team, and anyone assigned to the DECO LWIA
        ii. When it is **OFF**
            1. No restriction. Anyone who can open the report sees every LWIA, whatever their assignments.

    Note: *<u>it is restricted by</u>* ***LWIA Only****. It does not narrow by Office or by Career Planner*

- Pagination Bar
    a. The **Pagination Bar** allows users to navigate multi-page tables, track total record counts, and adjust page sizes.
        i. **Total Entries Display** (8 Entries): Shows the total number of records available in the current data set (per Category).
        ii. **Page Status** (Page 1 of 1): Displays the current active page and total number of pages.

iii. **First Page Button** (<<): Navigates directly to the first page of results.

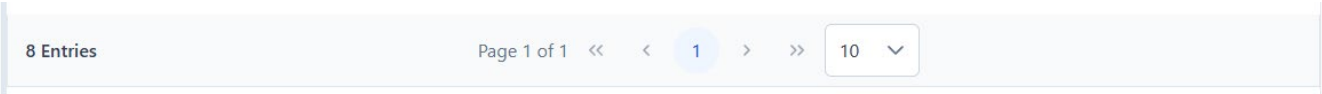
iv. **Previous Page Button** (<): Moves back to the preceding page.

v. **Page Numbers** (1): Indicates current page selection and allows direct jumping to specific pages.

vi. **Next Page Button** (>): Advances to the following page.

vii. **Last Page Button** (>>): Navigates directly to the final page of results.

viii. **Rows Per Page Dropdown** (10): Adjusts how many entries display per page (e.g., 10, 25, 50).

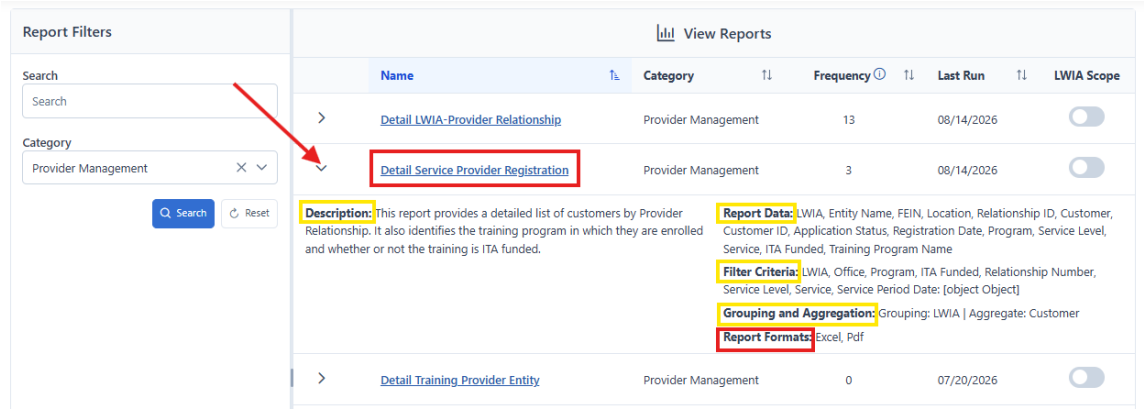


Navigate Name Expansion Chevrons

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** to the left of the Report Name.

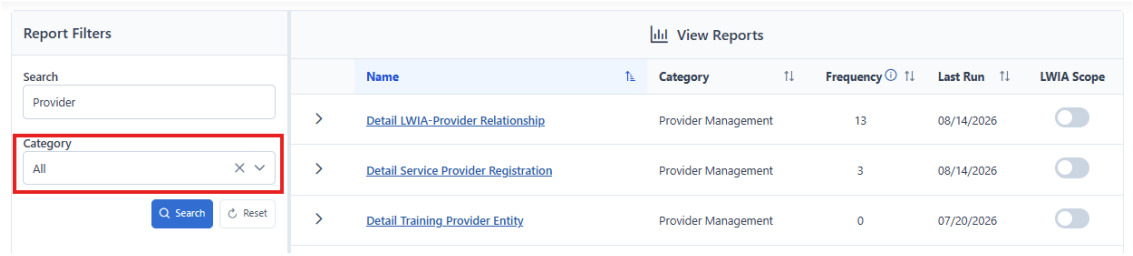
Note: *The expansion area shows the report* ***Description, Report Data, Filter Criteria, Grouping & Aggregation, and the Report Formats****.*



2. Review the expanded details

Note*: Ensure all expanded detail items (above) are thoroughly validated and correct for*

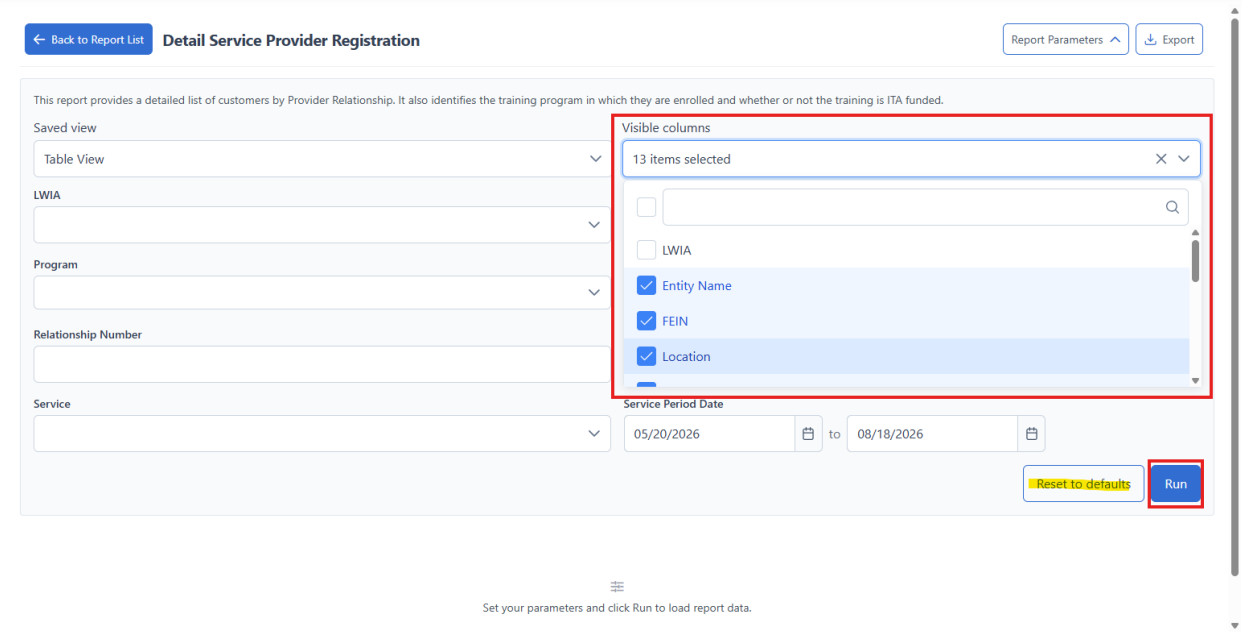
the specific report selected.



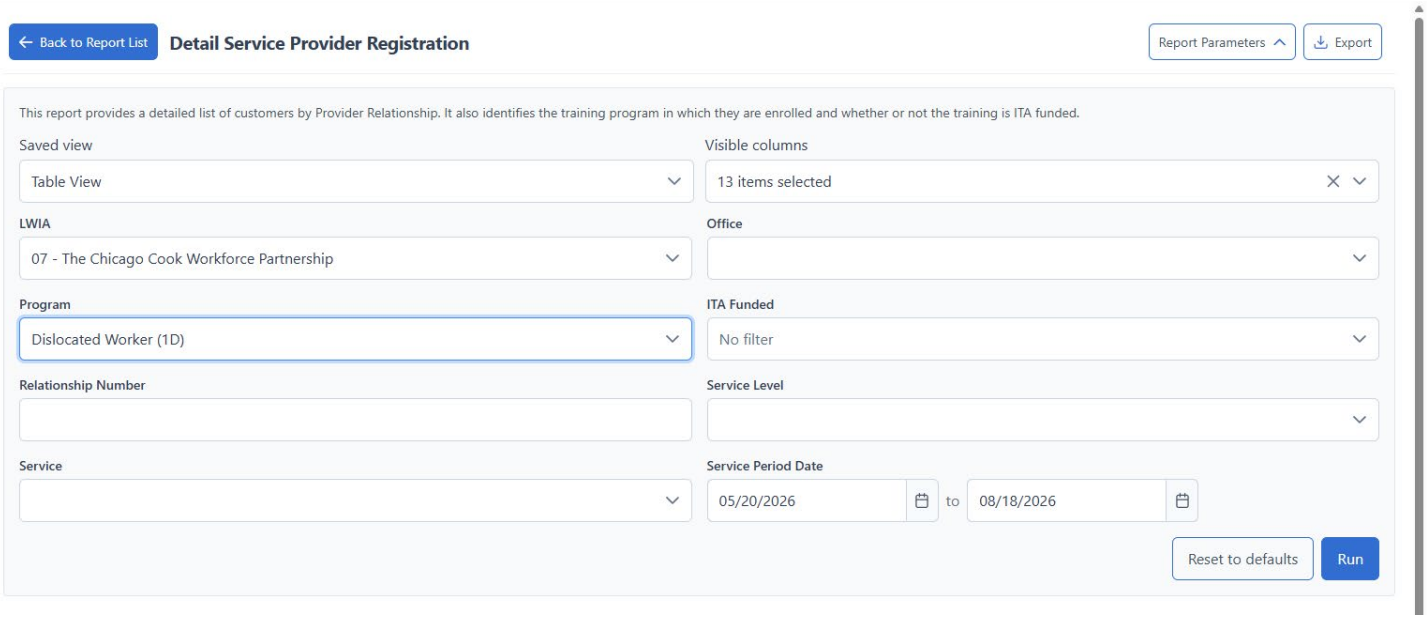
3. Close the **expansion chevron** to return to the default view.

Navigate to Report Parameters – RUN Report

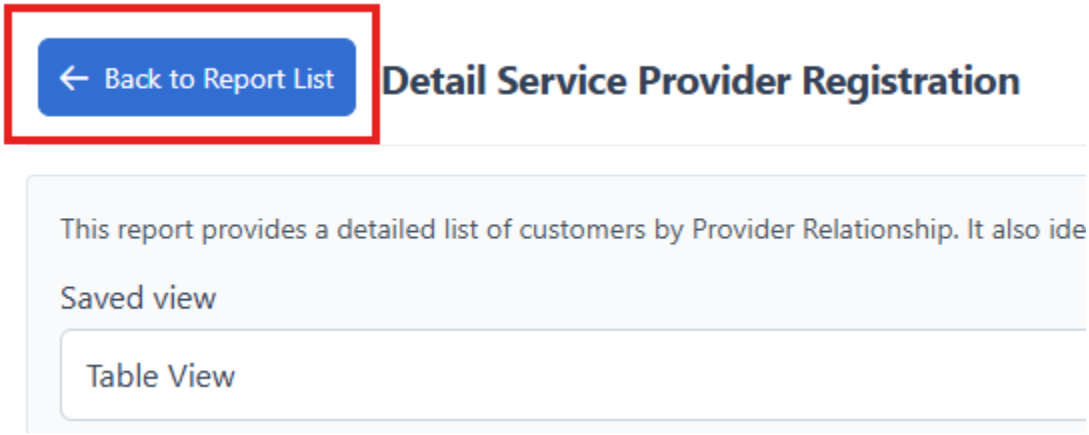
Configure the report parameters and visible columns, then select **Run** to execute the query and update the data view. Select **Reset to defaults** to restore initial filter settings.



The below example has LWIA 7, Program as Dislocated Worker (1D), and Service Period Dates selected.



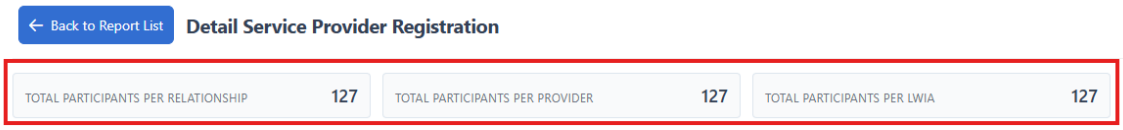
1. **Report Parameter Configuration:** Users can filter report output by defining inputs for available filter fields (*LWIA*, *Office*, *Program*, *ITA Funded*, *Relationship Number*, *Service Level*, *Service*, and *Service Period Date*).
2. **Execution:** Clicking the **Run** button validates selected parameters and queries the database to update the report view.
3. **Control Actions:**
    a. **Run**: Applies selected filter parameters and generates filtered results.
    b. **Reset to defaults**: Reverts all filter inputs and column selections to system default settings.
4. **Back to Report List:** Users can click the Back to Report List button (top left-hand side) anytime it is available to navigate to the previous page (see below):



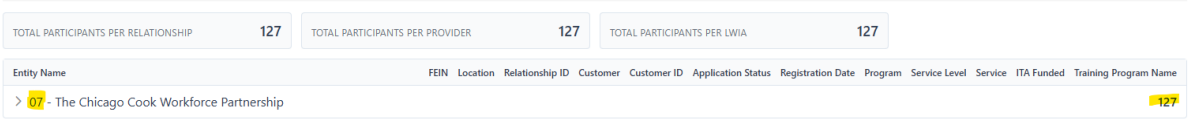
Navigate Sorters and Filters / Summary Cards

Once executed, reports display quick-reference **Summary Cards** (if applicable) and a **Data Bar** at the top of the page. Users can click the entity name chevron to view filtered report details and use interactive sort and filter icons on each data field to customize their view.

1. After clicking the **Run button**, the User will see "Summary Cards" at the top of the page.



2. Under the Summary Cards, The User will see the **Data Bar**.

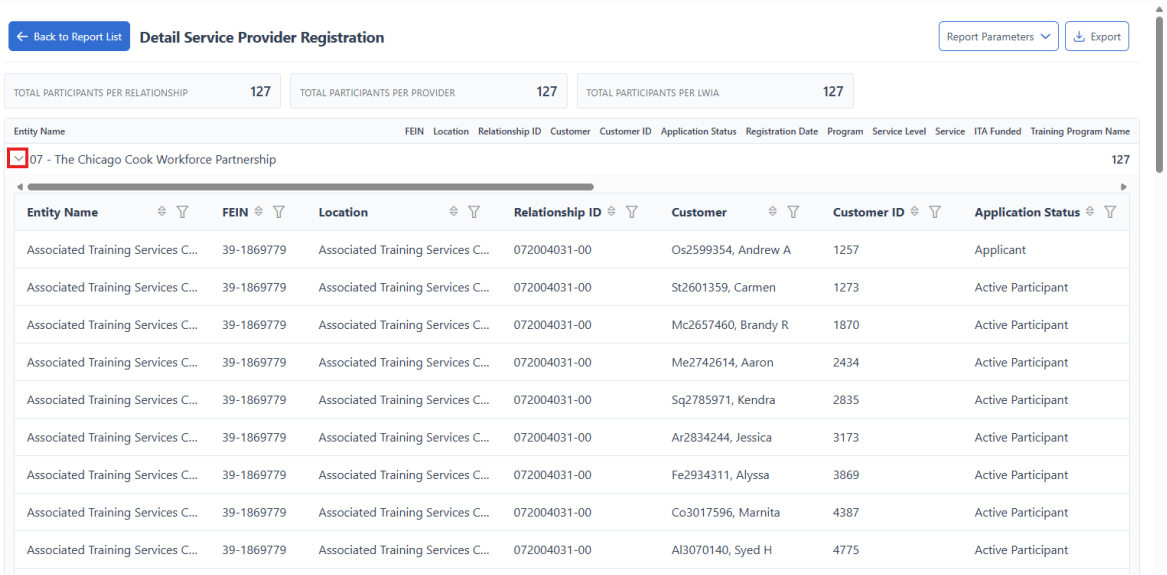


3. Click the **Entity Name Chevron** to open and view the report.

Note: Each report is laid out to match the selected Report Parameters.

4. Click the **Sort Icons** and **Filter Icons** (for each **Data Field**) to get familiar with how they work.

Note: Use the scroll bar to maneuver Left-Right and Up-Down.

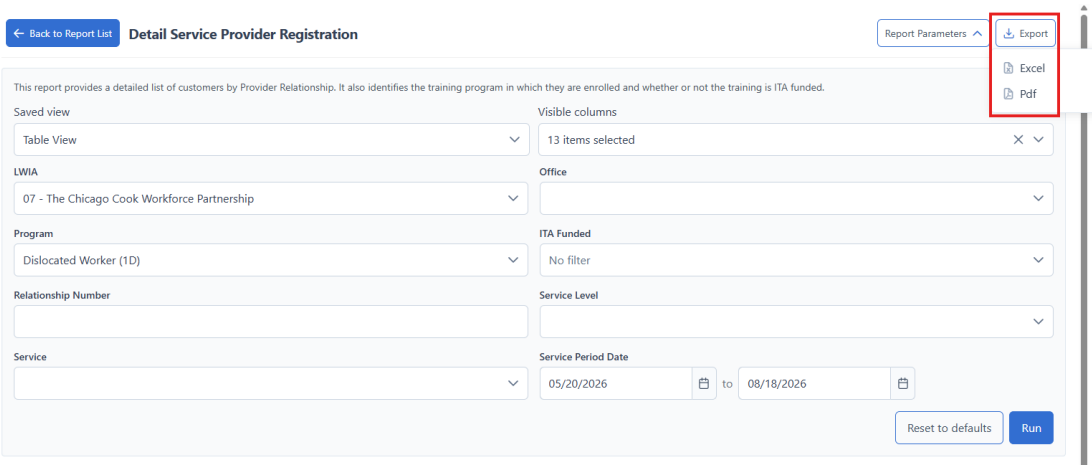


Navigate to Export

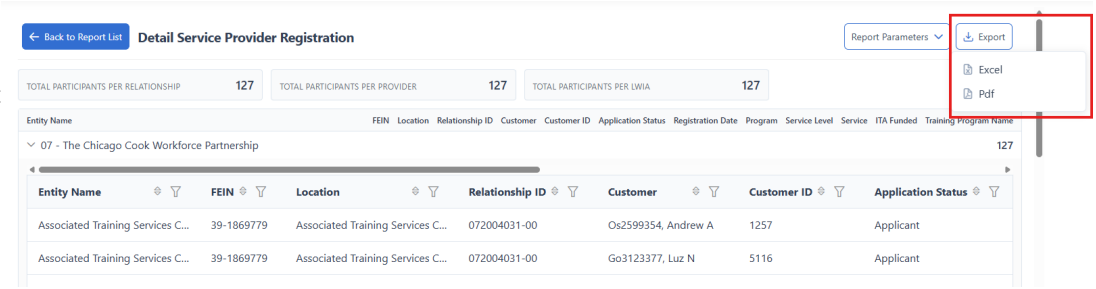
To export a report, click the **Export** button in the top-right corner and select your preferred file format: **Excel** for customizable data analysis or **PDF** for a print-ready document. The file will download automatically with your current filter criteria applied.

1. There are *two areas* to Export a Report.

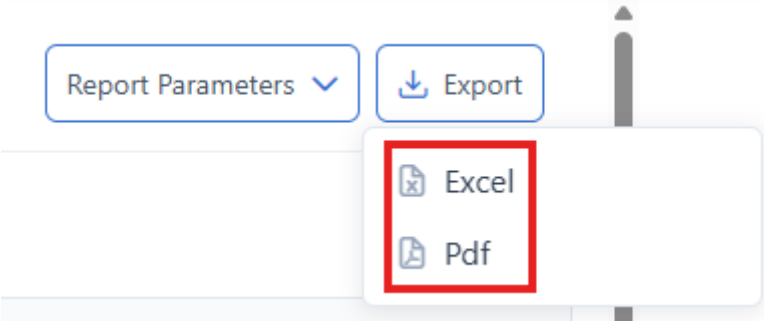
   a. Click the Export button at the top right of the Report Parameters Filter area



   b. Click the Export button at the top right of the Report View page



2. There are *two formats* for Exporting Reports; **Excel / Pdf**



3. Export Excel and Pdf Examples

Note**: **Excel** Version - There are two tabs in excel exports: **Data Fields** and **Query Criteria

	A	B	C	D	R
1	LWIA	Entity Name	FEIN	Location	
2	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
3	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
4	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
5	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
6	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
7	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
8	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
9	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
10	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
11	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
12	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
13	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
14	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
15	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
16	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
17	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
18	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
19	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
20	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
21	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
22	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
23	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
24	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
25	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07
26	07 - The Chicago Cook Workforce Partnership	Associated Training Services Corp.	39-1869779	Associated Training Services Corp	07

Report Data | Query Criteria

***Note:** The Query Criteria tab has the Name of the Report, Time Stamped when exported, the name of the user that exported, the Filter and Values*

	A	B	C	D	E	F
1	**Detail Service Provider Registration**					
2	**08/19/2026 03:09 PM**					
3	**Laura Menke**					
4						
5	**Filter**	**Value**				
6	LWIA	07 - The Chicago Cook Workforce Partnership				
7	Office					
8	Program	WIOA - Dislocated Worker (1D)				
9	ITA Funde					
10	Relationsl					
11	Service Le					
12	Service					
13	Service Pe	05/21/2026 - 08/19/2026				
14						
15						
16						
17						
18						
19						
20						
21						
22						

Report Data | Query Criteria

***Note**: Pdf Version*

Detail Service Provider Registration

07 - The Chicago Cook Workforce Partnership

Entity Name	FEIN	Location	Relationship ID	Customer	Customer ID	Application Status	Registration Date	Program	Service Level	Service	Training Program Name	ITA Funded
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Os2599354, Andrew A	1257	Applicant	05/29/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	St2601359, Carmen	1273	Active Participant	06/17/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Mc2657460, Brandy R	1870	Active Participant	05/29/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Me2742614, Aaron	2434	Active Participant	05/30/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Sq2785971, Kendra	2835	Active Participant	06/11/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Ar2834244, Jessica	3173	Active Participant	06/09/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Fe2934311, Alyssa	3869	Active Participant	06/12/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services Corp.	39-1869779	Associated Training Services Corp	072004031-00	Co3017596, Marnita	4387	Active Participant	05/23/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		
Associated Training Services	39-1869779	Associated Training Services	072004031-00	Go3123377, Luz N	5116	Applicant	06/04/2026	WIOA - Dislocated Worker (1D)	Training Services	Occupational Skills Training		

08/19/2026 03:31 PM Page 1 of 15

Note: *Scroll to the bottom of the Pdf to see the Query Criteria*

Detail Service Provider Registration

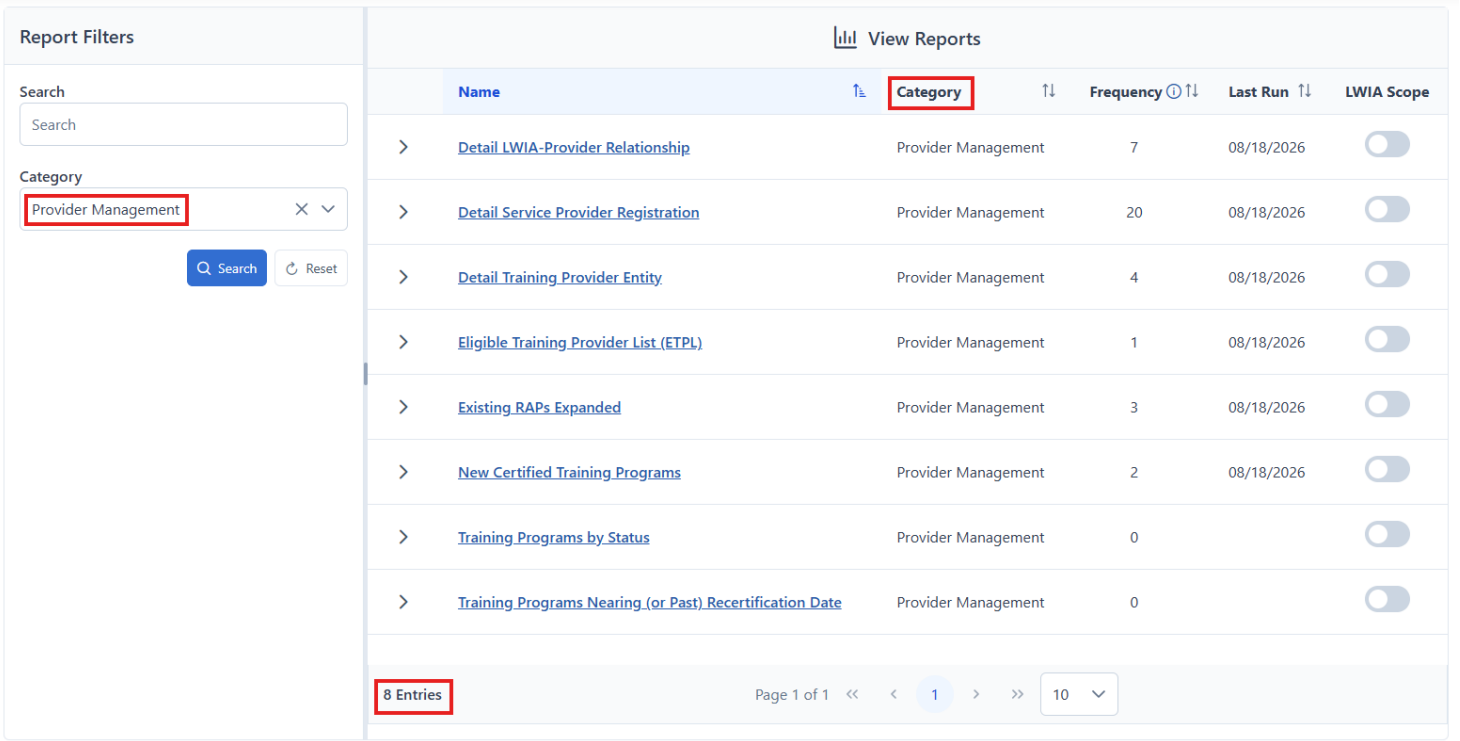
Detail Service Provider Registration
08/19/2026 03:31 PM
Laura Menke

Query Criteria

Filter	Value
LWIA	07 - The Chicago Cook Workforce Partnership
Office	
Program	WIOA - Dislocated Worker (1D)
ITA Funded	
Relationship Number	
Service Level	
Service	
Service Period Date	05/21/2026 - 08/19/2026

08/19/2026 03:31 PM Page 15 of 15

Provider Management Category Reports (Eight)

UAT Scope & Instructions:

- Focus Area: *Provider Management Reports only.*
- Action Required: *Validate the visual layout and data accuracy of each report* ***(including the name of each report).***
- Feedback: *Document of any bugs, missing fields, modifications, or questions encountered.*