

UAT Guide – Release #27-Cycle 2

Reports: Monitoring Reports for September 23 Training

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Overview

This guide directs stakeholders through the User Acceptance Testing (UAT) for **IWDS 2.0 Release #27-Cycle 2; GMS Reports**.

There are **sixteen reports** (merged two) that we prioritized for Monitoring Training. The **WIOA Plan vs Actual Summary report** is available in 2.0 under Grant Management (available via report soon). We have **Eight reports** available in Prod. For any missing reports, we have **spreadsheets** that can be exported in production on demand. A detailed request procedure is provided for the scripted reports. We are currently working on the **Target Population Summary report**, and the **Active TAA report**; both are available soon.

In addition, we need to make an additional discovery to discuss the **Training and Service Review report**. The following two reports are available through the Dashboard, 1) **Customers with Days Since Last Case Note** and 2) **Days Since Last Active Service**. Finally, the **IEBS Report** will be available on the IEBS side.

UAT Release #27 – Reports Expectations & Homework

Homework Areas

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

Reports

- Report – **Plan vs Actual** (WIOA Plan vs Actual Summary)- *Available through Grant Management STEPS to Follow:*
 - Management Tools > Grant Management > Select Program Type > Search
 - Select a Program Type
 - Click Search
 - Select Grant
- Report – **Participant History**- Participant Category
- Report – **Participants Nearing Exit** - Participant Category (Registrants Nearing 120 Day Exit Limit)
- Report – **Participants W/O Selective Service** - Participant Category (Registrants W/O Selective Service)
- Report – **Exit Participants with Employment W/O Follow Up** - Participant Category (WIOA Exiters with Employment w/o Follow Up)
- Report – **Youth Exit Participants W/O Follow Up** - Participant Category (WIOA Youth Exiters without Follow Up)
- Report – **Participants with No Open Services**- Participant Category (Registrants with No Open Services)
- Report – **Active Participants with No Career Planner**- Participant Category
- Report – **Participants Assigned to Inactive Career Planner**- Participant Category

Scripts – Excel Spreadsheet

- Script – **Active Trade (TAA) Participants**- Participant Category (Active TAA Report) [Active TAA](#)

Dashboard

- **Customers with Days Since Last Case Note**
- **Days Since Last Active Service**

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

By NOON on Wednesday, September 30.

Access to UAT Environment

To access the pages for testing in your browser, follow the link provided here:

[UAT Test Environment](#)

Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our *shared notebook*:

[UAT Release #27 - Cycle 2 - Reports: Monitoring](#) 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:
 - Al Menke - al.menke@siu.edu (Project Manager)
 - Kelly Trimble - kelly.trimble@siu.edu (Outreach Manager)
 - Laura Menke - laura.menke@siu.edu (BA)
 - 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 distinct categories:** *Data Extract, Data Lag, Federal, Grants, Participant, Performance Management, Provider Management, Resource Room/Referral Tracking, Sector Summary, TAA, and TAA Monitoring.*

For Reference only; we are not discussing during today's UAT – 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 (see below).

Report Filters

Search

Search

Category

All

✕

▼

🔍 Search

↺ Reset

View Reports

	Name	Category	Frequency	Last Run
>	Exit Participants with Employment W/O Follow Up	Participant	1	09/14/2026
>	Participant History	Participant	1	09/14/2026
>	Participants Nearing Exit	Participant	0	
>	Participants W/O Selective Service	Participant	1	09/14/2026
>	Youth Exit Participants W/O Follow Up	Participant	0	

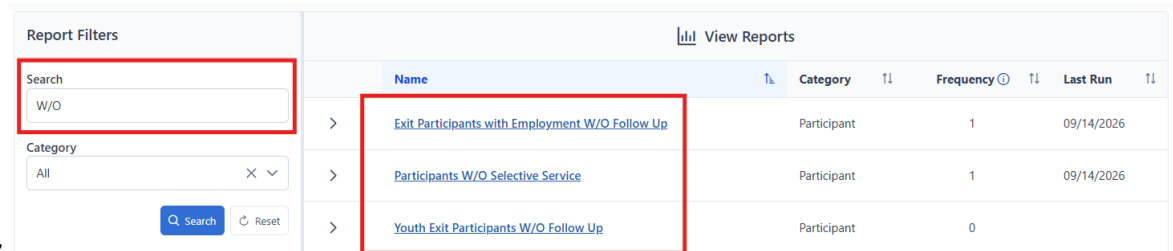
Navigating Report Search Filters; reference only (not reviewing during today's UAT)

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

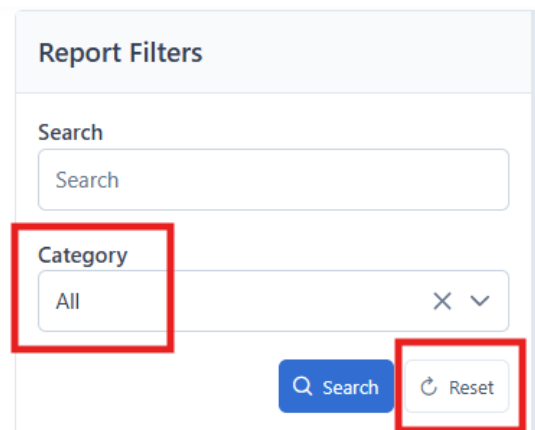
2. Click on the **Search** field (Left Panel) and type in a keyword (i.e., Summary).

3. Click the **Search** button.

4. Click the **Reset** button to clear all applied filters to restore the default view (**All**).

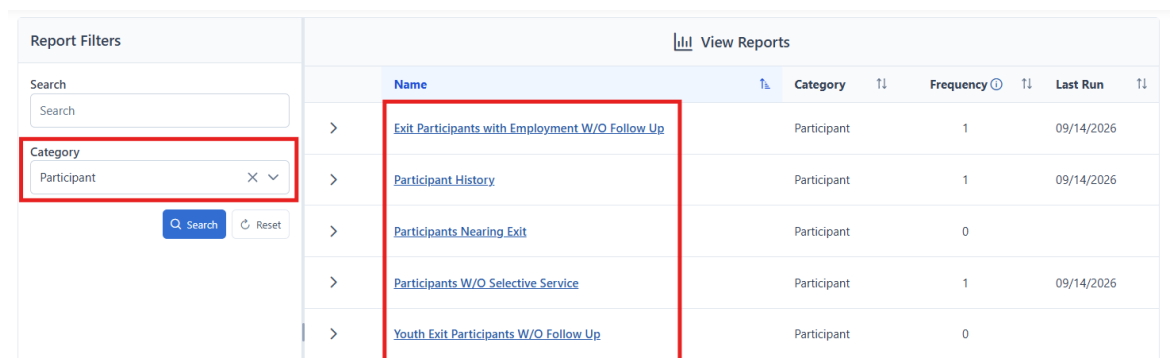


Name	Category	Frequency	Last Run
Exit Participants with Employment W/O Follow Up	Participant	1	09/14/2026
Participants W/O Selective Service	Participant	1	09/14/2026
Youth Exit Participants W/O Follow Up	Participant	0	



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

6. Click the **Search** button.



Name	Category	Frequency	Last Run
Exit Participants with Employment W/O Follow Up	Participant	1	09/14/2026
Participant History	Participant	1	09/14/2026
Participants Nearing Exit	Participant	0	
Participants W/O Selective Service	Participant	1	09/14/2026
Youth Exit Participants W/O Follow Up	Participant	0	

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

View Reports					
	Name	Category	Frequency	Last Run	
>	Exit Participants with Employment W/O Follow Up	Participant	1	09/14/2026	
>	Participant History	Participant	1	09/14/2026	
>	Participants Nearing Exit	Participant	0		
>	Participants W/O Selective Service	Participant	1	09/14/2026	
>	Youth Exit Participants W/O Follow Up	Participant	0		

- **Name / Sorter icon**
 - Click on any report **Name** link to open its **Report Parameters** page and customize filters.
 - Select the **chevron** (>) next to a report name to **view** its Description, Report Data, Filter Criteria, Grouping & Aggregation, and Report Formats.
 - Sorts table rows alphabetically (A–Z / Z–A) by report.
 - Interactive column header is used to sort items in ascending or descending order by Name.
- **Category / Sorter Icon**
 - The **Category** field indicates the classification assigned to each report
 - Interactive column header is used to sort items in ascending or descending order by Category.
- **Frequency (Info Bubble) / Sorter Icon**
 - The Frequency is the number of times the report has been ran this month.
 - Interactive column header is used to sort items in ascending or descending order by Frequency.
- **Last Run / Sorter Icon**
 - The **Last Run** column records the timestamp of the report's most recent run.
 - Interactive column header is used to sort items in ascending or descending order by Date.
- **Pagination Bar (see below)**

5 Entries	Page 1 of 1	<<	<	1	>	>>	10	▼
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- 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).