UAT Guide – Release #31- Reports

Reports: Reports + General Navigation (reference only)

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Overview

This guide directs stakeholders through User Acceptance Testing (UAT) for IWDS 2.0 Release 31 Reports, focusing on **Active Caseload Summary, Adult Priority, ITA Funded Training, Participants by Application Status,** ~~**Participants by Career Planner**~~**, Participants by Employment History, Paused Active Participants,** and **Training Programs Nearing Expiration.**

UAT Release #31 – Reports Expectations & Homework

Note: We are adding Potential Use to All Reports soon.

Homework Areas

Navigate to test each of the following Reports:

- Active Caseload Summary
  - Combines Caseload Summary and Caseload Summary Youth from IWDS 1.0.
- Adult Priority
- Previous Non-Priority Adult (1A). Added a filter for priority and non-priority participants.
- ITA Funded Training
- Participants by Application Status
- Previously Participants by Customer Status
- Participants by Employment History
- Paused Active Participants
  - New report for IWDS 2.0
- Training Programs Nearing Expiration
  - Previous 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 Tuesday, Dec 1st. 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:
IWDST UAT Environment (Pink Banner with THIS IS A TEST SITE logo)

Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our shared notebook.
This Notebook link can also be accessed directly from this page: IWDST Full Resources

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:
  - 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 twelve distinct categories (*subject to change*):

- Data Extracts
- Data Lag
- Federal
- Grants
- Participant
- Performance Management
- Provider Management
- Referrals
- Resource Room
- Sector Center

- 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 -

This Section is for Reference Only; reviewed during previous UAT

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:

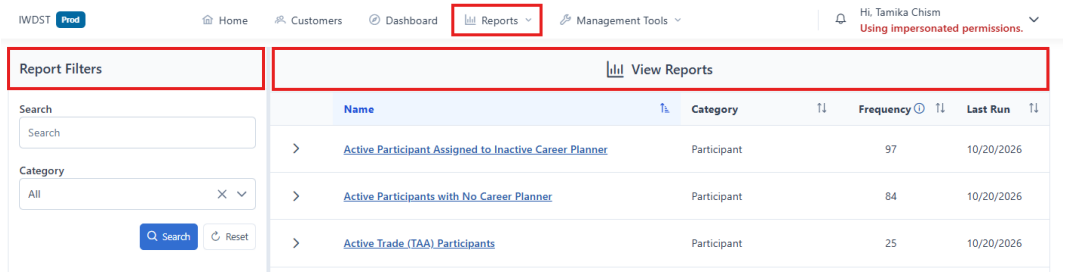
- **Left Panel (Report Filters):** A dedicated search and filter panel used to quickly narrow down data options and execute targeted queries.
- **Right Panel (View Reports):** The main display list, which automatically loads the first full page of available reports upon arrival for immediate visibility.

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.*



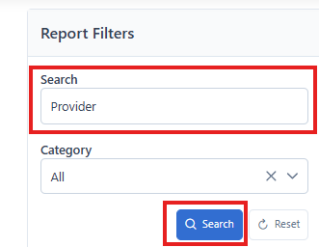
2. Click into the **Search field** and type in a keyword (e.g., Provider).

3. Click the **Search button.**

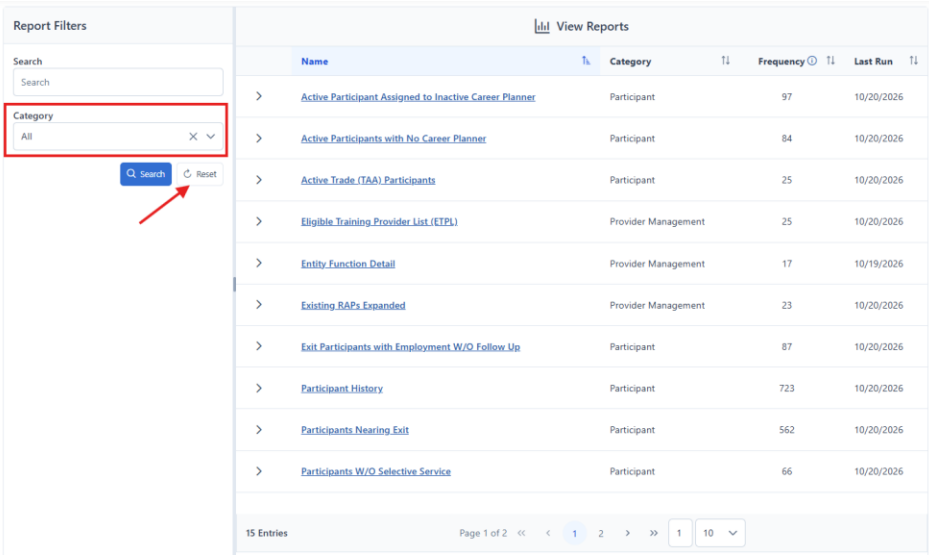


Note: *Entering keywords into the Search field performs a*

comprehensive search across all report attributes, including the Name, Category, Description, Report Data, etc.

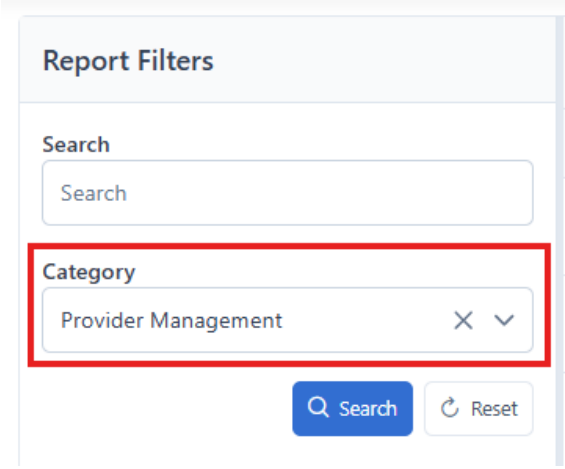


4. Click the **Reset button** to clear all applied filters and restore the default view.

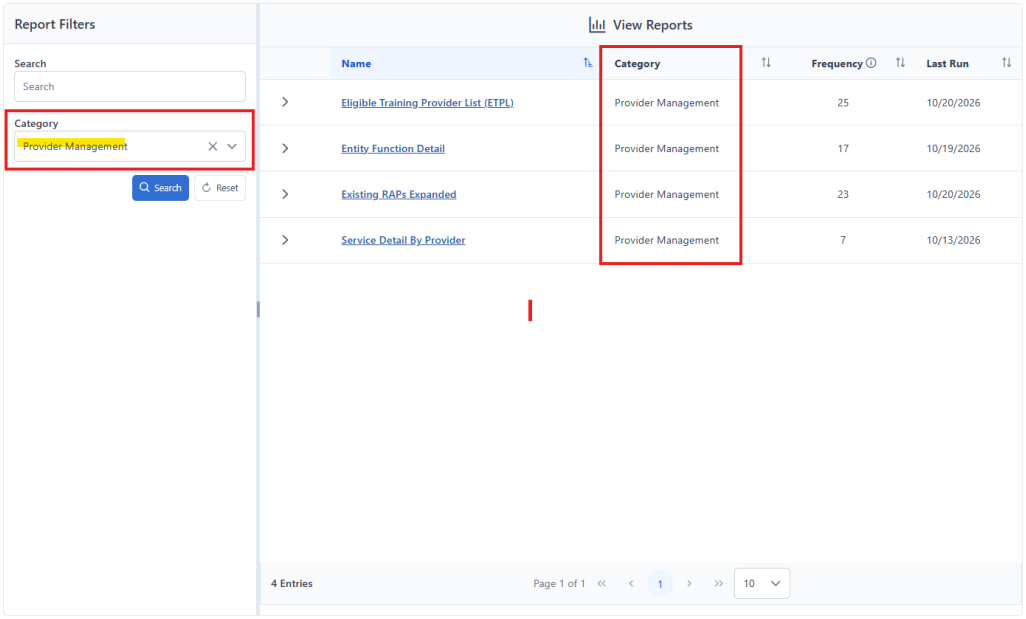


5. Click the **Category** dropdown and select **Provider Management.**

6. Click the **Search** button.

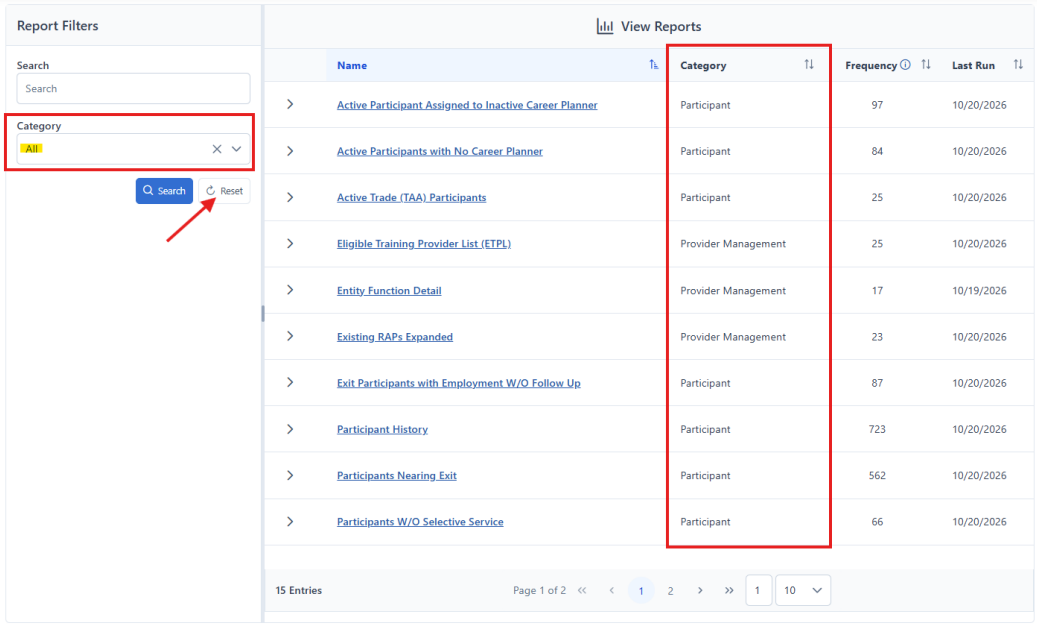


***Note**: The *View Reports* panel will update to display only the reports categorized under **"Provider Management"**.*



7. Click the **Reset button**

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

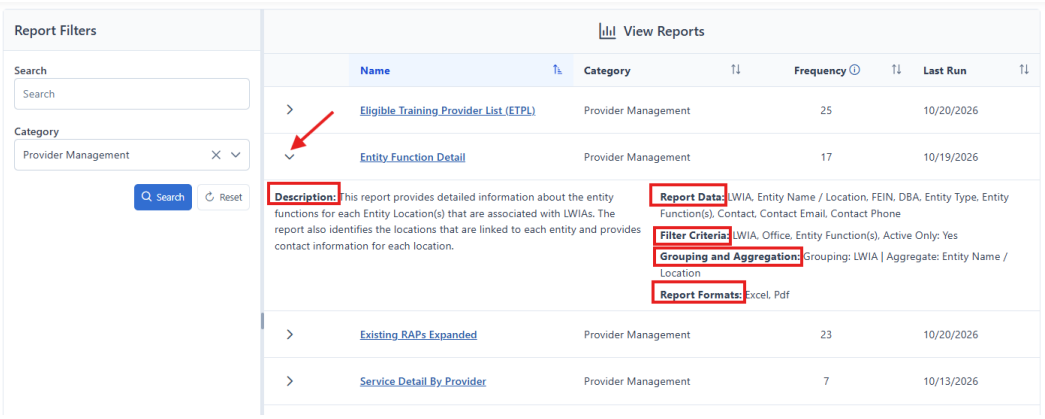


Navigate Name Expansion Chevrons

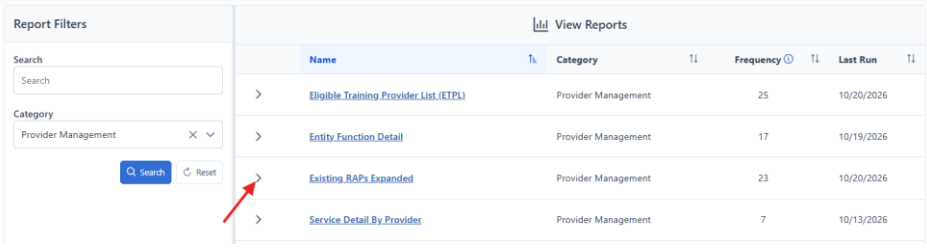
Each report on the landing page features an interactive chevron that allows you to dive deeper into a report's specific configurations without leaving the main list. Use the following steps to open the expanded layout, verify the underlying documentation, and collapse the view when finished.

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



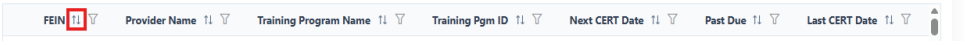
Navigate Sorters and Filters / Summary Cards / Pagination

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*."

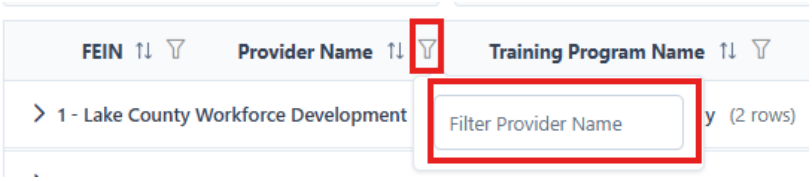


2. You can sort the report by selecting a sorter icon or the column header. Click on one of the Data Field **Sort Icons** to ascend or descend the view.

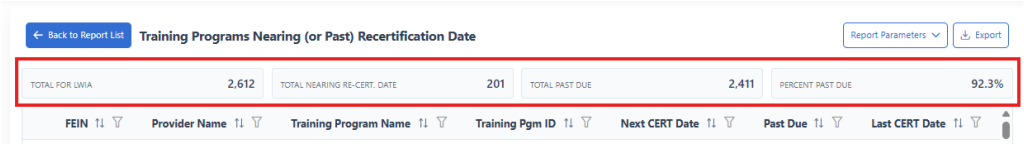




3. You can filter all rows in the report using Filter rows input field. Click on one of the Data Field **Filters** and type a word into the field and the report will filter that word.



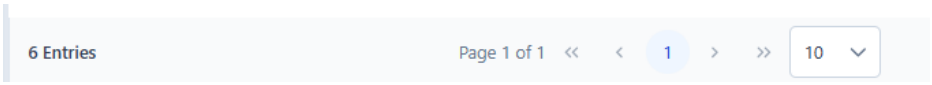
***Note**: The top of the report page features a row of **Summary Cards** that are specific to each report and load automatically.*



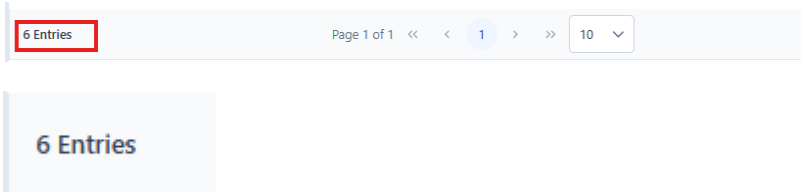
***Note:** A close-up example for viewing (showing 2 of the 4 in the above screen shot).*



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

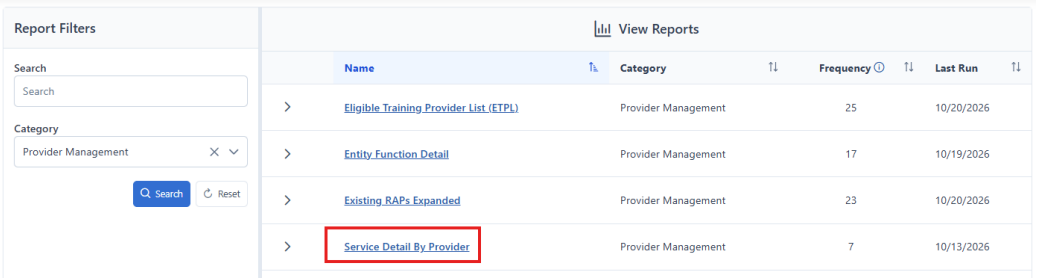


Run Reports / Report Parameters / Export

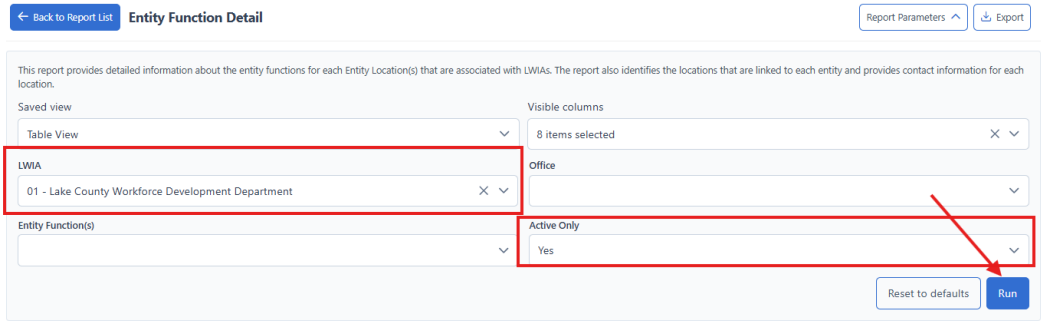
Users can execute reports from the **View Reports** panel in two ways: via the **report Name hyperlink** for an immediate launch using default data fields, or via the **Run Button**. (e.g., *Run: Service Detail by Provider*) for targeted parameter adjustments.

1. To run the report, you use one of two buttons. Click the **Hyperlink Report Name.**

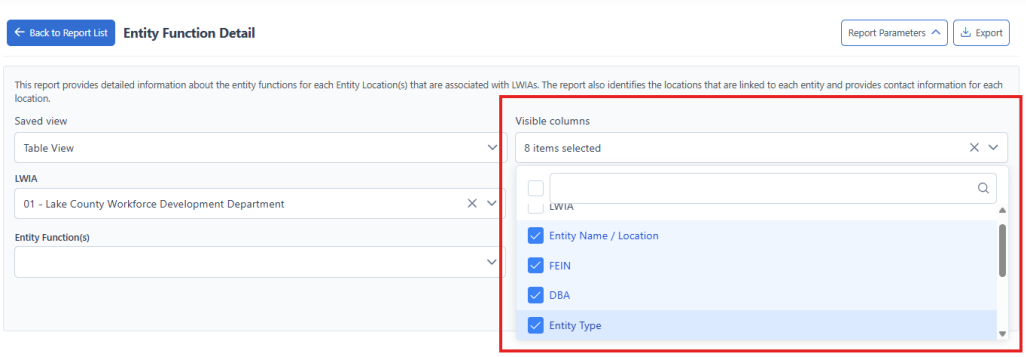
***Note**: The link will run the report with the default selection criteria.*



2. Select the Report Parameters and click the **Run Button**.



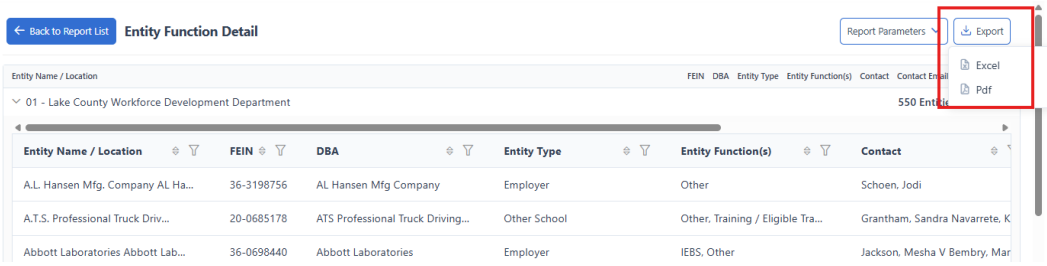
3. If needed, go back to the **Report Parameters** and use the **Visible columns** to filter Data Column selections to modify the data fields layout.



4. Click the **Run Button** to run the Report

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

