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Overview

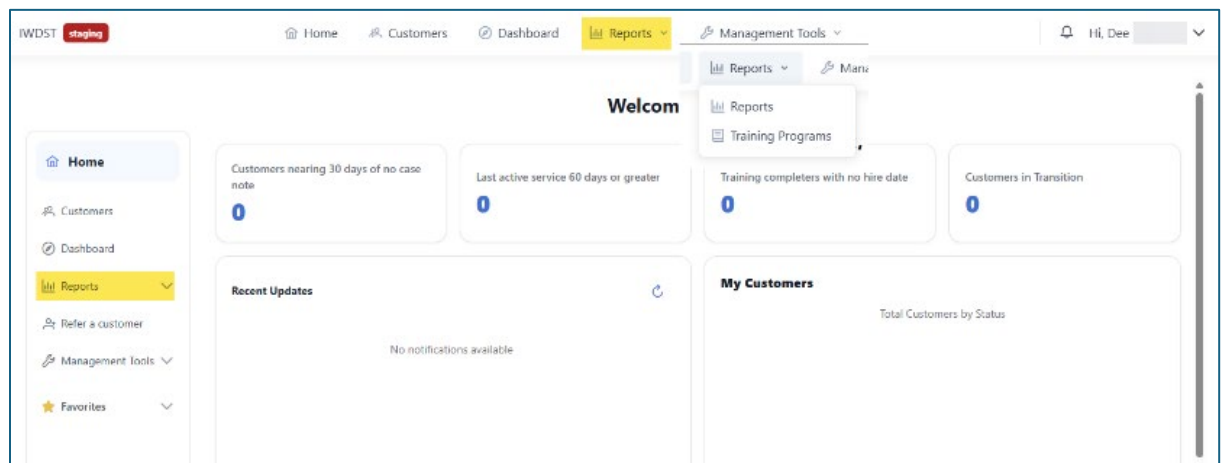
These instructions show how to find, run, filter, and export a report in IWDS 2.0, using the Participant History report as the example. The same steps apply to every report on the View Reports page.

This guide covers reports released on or before September 17, 2026. Reports added after that date may not be shown here, but you find and run them the same way.

Open the Reports page

- 1) Sign in to IWDS 2.0. The **Home** page opens.
- 2) In the top navigation bar, hover over **Reports**.
- 3) Select **Reports** from the menu.
 - You can also select **Reports** from the left-hand menu on the Home page.

Result: Opens to the Two-Panel Reports Landing Page.



Result: Dual-panel layout allows you to easily manage, filter, and browse reports from a single screen.

The **Left Panel** (Report Filters) is a dedicated search and filter panel used to quickly narrow down data options.

The Right Panel (View Reports) is the main display list, which automatically loads the first full page of available reports; defaults to All categories. It lists each report available to you with its **Name**, **Category**, **Frequency**, and **Last Run** date.

Report Filters

Search

Search

Category

All

×

▼

Search

Reset

View Reports

Name	Category	Frequency	Last Run
> Active Participant Assigned to Inactive Career Planner	Participant	83	10/14/2026
> Active Participants with No Career Planner	Participant	67	10/14/2026
> Active Trade (TAA) Participants	Participant	18	10/12/2026

Search for a report

Use the **Report Filters** panel on the left side of the View Reports page.

- 1) In the **Search** box, type a keyword from the report name (for example, *Active*).
- 2) Select **Search**. The list shows only reports that match.
- 3) (Optional) To filter by type, open the **Category** dropdown and select a category.
 - (a) All
 - (b) Data Extracts
 - (c) Data Lag
 - (d) Federal
 - (e) Grants
 - (f) Participant
 - (g) Performance Management
 - (h) Provider Management
 - (i) Resource Room
 - (j) Referral
 - (k) Sector Center
 - (l) Summary
 - (m) TAA
 - (n) TAA Monitoring
- 4) To clear your search and filters, select **Reset**. The full report list returns.

Tip: Select a column header (Name, Category, Frequency, or Last Run) to sort the report list.

Report Filters

Search

Category
All

Search
Reset

Report Filters

Search

Category
All

All
CCWP
Data Extracts
Grant
Participant
Provider
Provider Management
Sector Center
Summary

View Reports

Name	Category	Frequency	Last Run
> Active Participant Assigned to Inactive Career Planner	Participant	1	10/01/2026
> Active Participants with No Career Planner	Participant	0	09/21/2026
> Active Trade (TAA) Participants	Participant	2	10/01/2026
> Active WIOA Training	Participant	0	09/22/2026
> Caseload Summary	Summary	0	09/24/2026
> Customer Address Extract	Data Extracts	2	10/01/2026
> Customer Contact Information by Career Planner	Data Extracts	1	10/01/2026
> Customer Employer Extract	Data Extracts	0	07/31/2026

51 Entries
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1 10

Review report details

Check the report's details before running it to confirm it has the data you need.

- 1) Select the arrow (>) to the left of the report name.
- 2) Review the details panel that expands below the report:
 - **Description:** what the report shows / **Potential Use:** What the report is used for.
 - **Report Data:** the fields included in the results.
 - **Filter Criteria:** the parameters you can set.
 - **Grouping and Aggregation:** how results are grouped and counted.
 - **Report Formats:** the export options (Excel and PDF).
- 3) Select the arrow again to collapse the panel.

View Reports

Name	Category	Frequency	Last Run
Active Participant Assigned to Inactive Career Planner	Participant	1	10/01/2026

Description: This report lists all Participants that are assigned to an Inactive Career Planner.

Report Data: LWIA, Office, Name, DOB, ID, Program, Application Date, Career Planner, User ID

Filter Criteria: LWIA, Office

Grouping and Aggregation: Grouping: Office | Aggregate: Name

Report Formats: Excel, Pdf

Open a report and set parameters

- 1) Select the report name link (for example, **Participant History**). The report's parameters page opens.
- 2) (Optional) Use **Saved View** to choose how results display (for example, Table View).
- 3) Review the **LWIA** field. It is required, as marked by the asterisk (*).
 - Depending on your access, your LWIA may already be filled in and locked.
 - If it is not filled in, open the dropdown and select your LWIA.
 - Office locations are based upon the entities associated with your LWIA
- 4) (Optional) Set any other parameters to narrow your results (based on the report):

Parameter	Type
LWIA*	Dropdown
Office	Dropdown
Career Planner	Dropdown
Participant Status	Dropdown (Applicant, Active Participant, Exited Participant)
Program	Dropdown
In vs Out of School Youth	Dropdown
Participation Date	Date range (From / To)
Exit Date	Date range (From / To)
Service Date	Date range (From / To)
Exit Reason	Dropdown
Grant Number	Dropdown
Service Level	Dropdown

- 5) (Optional) Use **Visible Columns** to choose which columns appear in the results.
 - a) LWIA
 - b) Office
 - c) Career Planner
 - d) Participant Name
 - e) Participant Age
 - f) Program
 - g) Status
 - h) Application Date
 - i) Registration Date
 - j) Exit Date
 - k) Exit Reason
 - l) Service Start Date
 - m) Service End Date
 - n) Successful Completion

o) Participation Date

Tip: Select **Reset to Defaults** to clear all parameters and start over. Parameters vary by report; check Filter Criteria in Step 3 for the list.

Run the report and review results

- 1) Scroll to the bottom of the parameters and select **Run**.
- 2) Wait for the report to load. A loading message appears while data is retrieved.
- 3) Review the **summary tiles** at the top of the page. They show **Participant History** and a count for each program.
- 4) Below the tiles, results are grouped by **Office**. The total record count for each group appears on the right.
- 5) Select the arrow (>) next to a group to expand it and see individual records. Large groups may take a moment to load.

Office	Career Planner	Participant Name	Participant Age	Program	Status	Application Date
Symbol Training Institute	B	II	65	WIOA - Dislocated Worker (1D)	Exited Participant	04/25/2023
Symbol Training Institute	B	II	65	WIOA - Rapid Response (1E)	Exited Participant	04/25/2023
Symbol Training Institute	B	II	65	National Dislocated Worker Gra...	Exited Participant	04/25/2023
American Job Center in Wheelin...	V		52	WIOA - Dislocated Worker (1D)	Exited Participant	07/29/2020
American Job Center in Wheelin...	V		52	WIOA - Rapid Response (1E)	Exited Participant	07/29/2020
American Job Center in Wheelin...	V		52	National Dislocated Worker Gra...	Exited Participant	07/29/2020

Sort and filter columns

Sort and filter the expanded results without rerunning the report.

To sort a column:

- 1) Select the sort arrows next to the column name; Ascending and descending order (for example, **Participant Name**).
- 2) Select again to reverse the sort order.

To filter a column:

- 1) Select the funnel icon next to the column name (for example, **Career Planner**).
- 2) Type the value you want to see in the filter box (for example, a career planner's last name).
- 3) The table updates to show only matching records.
- 4) To remove the filter, clear the text in the filter box.

To view more columns: Use the horizontal scroll bar above the table to scroll right. Additional columns include Application Date, Registration Date, Exit Date, Exit Reason, Service Start Date, Service End Date, and Successful Completion.

Adjust report parameters

Change your parameters from the results page without going back to the report list.

- 1) Select **Report Parameters** at the top right of the results page. The parameters panel expands.
- 2) Change the parameters you need (for example, set **Participant Status** to *Active Participant*).
- 3) Select **Run**.
- 4) Wait for the updated results to load. Larger reports can take longer; do not navigate away while the report is loading.

Tip: Select **Report Parameters** again to collapse the panel.

Export the report

- 1) Select **Export** at the top right of the results page.
- 2) Choose **Excel** or **PDF**.
- 3) A **Downloading** notification confirms the download has started.
- 4) Open the file from your browser's downloads or your Downloads folder.
 - The file name includes the report name and the date and time it was run (for example, *Participant History 20260930-103347.xlsx*).
 - If Excel opens the file in Protected View, select **Enable Editing** to work with the data.

What's in the Excel file:

Tab	Contents
Report Data	The report results, one row per record, with all visible columns
Query Criteria	The report name, run date and time, who ran it, and the value of each parameter used

Tip: Keep the Query Criteria tab with the data. It shows exactly how the report was run if you need to rerun or explain it later.

Data security: Exported reports contain participant information. Store and share them according to your agency's data security policies.

Return to the report list

- 1) Select **Back to Report List** at the top left of the report page.
- 2) The View Reports page opens, where you can choose another report.

Troubleshooting

Issue	What to do
I don't see a report I need	Select Reset to clear search filters. If it still isn't listed, the report may not be available for your role, or it may have been released after this guide.
The LWIA field is locked	Your LWIA is set by your access. Contact your administrator if it is incorrect.
The report is taking a long time to load	Large reports can take a minute or more. Wait for the loading message to clear and avoid leaving the page. Narrowing parameters (for example, a date range or office) can speed things up.
No results appear	Check your parameters for conflicting values, then select Reset to Defaults and run again.
The download didn't start	Check your browser's downloads list and any pop-up or download blocker.
The Excel file won't let me edit	Select Enable Editing in the Protected View banner.

Need more help? Submit a support ticket from the IWDS 2.0 Home page.

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