WorkinTexas.com Reports Management Training Guide

Approved by the

Texas Workforce Commission

Training and Development Department

Training and Development Mission

We are here to help TWC, and our partners enhance employee workplace skills and productivity through the development, coordination, and delivery of quality learning opportunities.

Texas Workforce Commission

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WorkinTexas.com Reports Management

Course Objectives

After completing this course, you will be able to:

- understand how to find a report in the system.

- understand general tasks such as downloading, uploading, scheduling, saving, and modifying report outcomes.

- understand parent and child report designations.

- define report time parameters and report types.

- be knowledgeable of the report categories.

About This Training

As we progress through this training guide, you will be working as a Staff user type to access and generate system reports. Although your staff training account privileges will be set high, your staff privileges when operating in production WIT may not be as robust. The benefit of this scheme enables training participants to realize how powerful the WIT system can be.

The data in the training environment is fictitious. Make sure that you do not enter any Personal Identifiable Information (PII) in the training environment.

Glossary of Terms

Throughout the case management training you will receive, we will reference the following terms:

- **Individual or Job Seeker** – Terms used interchangeably to describe a person who receives program services.

- **Applicant** – An Individual for whom program eligibility determination has yet to be determined.

- **Participant** – A program applicant who is actively receiving program services.

- **Staff** – Synonymous with case manager or workforce agency employee, a program expert who manages service delivery for program participants.

- **Assist** – Following system registration, staff can access a customer's profile by selecting **Manage Individuals > Assist an Individual** to manage the customer's information.

- **Currently Managing** – The section located within staff's left navigation menu that displays the name of the individual (or employer) whose account the staff user is currently managing.

- **Left Navigation Menu** – The list of staff user options staff access by selecting the **Menu** hyperlink at the top left center portion of the WIT screen.

- **Release Individual** – A hyperlink command displayed in the Currently Managing section that when selected, enables staff to stop assisting the current individual (or employer).

- **Ribbons** – The panels or containers displayed on the Programs tab screen for each program that maintain specific program details such as program services.

- **Widgets** – Quick links to specific information that are commonly used and easily accessed from the Staff dashboard. The job seeker and employer dashboards also have corresponding widgets. Widgets can be configured and customized by the staff member, job seeker or employer.

- **Wizard** – A step-by-step guide for completing a process in WIT, such as a program application form to determine program eligibility.

- **Dashboard** – Primarily used as the landing page, or the first page displayed upon log in. The dashboard is a quick way for staff members to view common items and information through widgets.

- **Enrollments** – A term synonymous with program activities or services provided to a program participant.

- **Registration** – A term with dual meaning. System Registration is how an individual (or staff user on their behalf) create an account profile, while Program Registration refers to completion of the program application form.

- **Soft Exit** – The process by which the system automatically closes a participant's active service delivery for a single program (i.e., Wagner Peyser, WIOA, SNAP E&T, Choices, or Trade) due to non-service for 90 consecutive days.

- **Combined Soft Exit** – The process by which the system automatically closes a participant's active service delivery in

two or more programs (i.e., Wagner Peyser, WIOA, SNAP E&T, Choices, and/or Trade), due to non-service for 90 consecutive days for each program affected.

- **Hard Exit** – The process by which staff manually creates a program outcome for the individual. This usually occurs if the individual satisfies a global exclusion reason. (i.e., the individual is deceased).

- **Case Closure** – An interim step/process to officially stop the delivery of **planned** program services until the soft (or hard) exit process occurs.

- **Authorized Staff** – Staff users whose privileges enable them to perform specific functions in the system.

- **Co-enrollment** – This term is applied when an individual is enrolled in two or more federal programs simultaneously. In this context, the combined soft exit procedure will apply to individuals co-enrolled in the Wagner Peyser, WIOA, SNAP E&T, Choices, or Trade programs.

- **Case Assignment** – The process by which an individual is assigned to a specific case manager or a group of case managers for the purpose of receiving specialized assistance.

- **Formula Eligibility Determination** – The automated process by which the system determines applicant eligibility for program services based solely on the data entry performed and the business rules that govern eligibility determination.

- **Business Rule** – In software development, a **logic qualifier** usually in the form of an **If-Then** clause that enforces local, state, and federal regulatory requirements.

- **Grant Enrollment** – The process by which staff manually set WIOA program eligibility for specific grant codes. This occurs in addition to formula eligibility determination.

- **Document Management** – The process by which staff obtain client documents electronically and add them to the client's account profile.

- **Remote Signature** – The ability to affix required signatures digitally on various program forms on behalf of staff, the individual, and others as needed.

- **Case Note** – Staff-entered documentation that provides a fact-based description of an individual's interaction with the Work in Texas system.

- **Credentials (Ribbon)** – This is a common ribbon for each program, whereby staff may enter credentials an individual earned by successfully completing a training program.

- **Parent-level Report** – This is the initial report view generated for staff user analysis.

- **Child-level Report** – This is the secondary report view achieved when a staff user selects a hyperlink displayed in the parent-level view.

- **SQL** – Structured query language (SQL) is a programming language for storing and processing information in a relational database.

- **PIRL** – The Participant Individual Record Layout (PIRL) is a federal Department of Labor (DOL) mandated reporting layout that provides a standardized set of data elements, definitions

and reporting instructions that are used to describe the
characteristics, activities, and outcomes of WIOA participants.

Getting Started: Staff Login

To manage report generation in the WIT system, staff must first log in to the system, just as they would to manage service delivery for individuals in any of the programs that WIT includes.

Note: Staff users do not create their own accounts. The System Administrator creates and manages staff accounts, staff logins, staff privileges, and Workforce Area assignments.

The production environment uses a single sign-on approach which enables you to use the same login credentials for other Workforce applications. The staff training login is generic and applies to the training environment only.

To log in as a staff user type, follow these steps:

1. Access the Home page according to the trainer's directions.

2. Click the **Sign In / Register** button.

3. Enter **Username**.

4. Enter **Password.**

5. Select **I'm not a robot** checkbox for reCAPTCHA. This may not show in the training site.

6. Click **Sign In**.

7. Review Staff Sign-in Notice text.

8. Click **I agree**.

Reports Overview

The Work in Texas system provides a robust list of reports and report categories to assist with all types of system reports. Report categories are organized in a logical manner so that users can locate pertinent reports with relative ease. Report outcomes are organized to provide an extensive amount of information based on data input. Users can create reports that display:

- Information about the individuals and employers using the system and the methods they use to access information in the system.

- Information on services that are provided to these users.

- Statistical information on case management programs, job orders, job applicants, and résumé.

- Case management data related to goals, program applications, enrollments, skill attainment rates, program exits, and other caseload and predictive reports.

To access, generate, and otherwise manage reports in WIT, staff must have the appropriate privileges. Otherwise, when staff attempts to access a report category, for example, the system will display a notification message similar to the following:

No Permissions
You are not authorized to view this page.
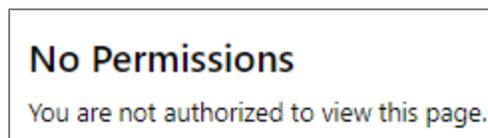
Sample No Permissions Notification Message

Reports Access from the Left Navigation Menu

The WIT system includes a Reports group maintained along the left navigation menu that displays the main report categories as shown in the following figure:
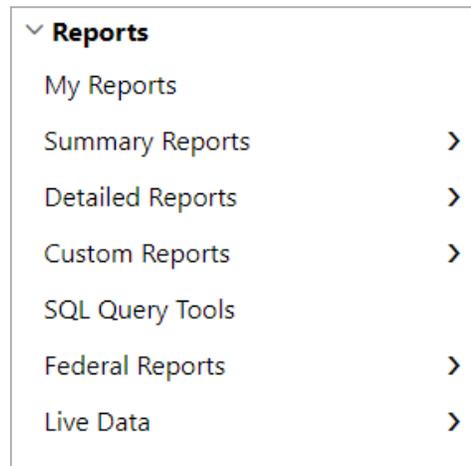
Reports Group in Left Navigation Menu

Staff may select from the following:

- **My Reports** – Displays reports saved by the staff member, reports saved by other staff and shared with you, saved SQL queries (both yours and those shared by your fellow staff). Also saved are the actual report parameters selected to generate the report before saving it.

- **Summary Reports** – Displays options to view executive summary and dashboard reports that summarize key information for senior staff and other stakeholders.

- **Detailed Reports** – Offers access to reports on detailed information in the system with a variety of parameters and filters (e.g., registered individuals, enrolled individuals, services provided, and case management reports).

- **Custom Reports** – Displays reports developed specifically for Virtual OneStop (aka, VOS Sapphire) state customers (e.g., a state's unique SQL query converted to standard Virtual OneStop parameters and controls).

- **SQL Query Tools** – Enables skilled, authorized staff to directly query the WIT database to create custom reports utilizing a free-form basic SQL template or a guided wizard.

- **Federal Reports** – Displays report titles that meet the requirements of federally mandated reports required for the workforce development industry.

Note: Federal reports do not apply to Agency Defined Programs. They apply to federal programs in WIT, such as Wagner-Peyser, WIOA, TAA, Choices, and SNAP E&T.

- **Live Data** – Enables staff to look at graphs of real-time transaction data that automatically refreshes every 60 seconds. These include the following transactions:

  - Individual system registrations

  - Employer system registrations

  - Resumes created.

  - Job orders created.

Note: The Live Data report category is not operational for the WIT system.

Report Navigation

Training Objectives

After completing this lesson, you will be able to:

- successfully navigate to the Reports group.

- recognize components of the Reports group.

- Locate desired report categories and report titles.

The Reports Options page provides multiple ways to find reports to generate, as well as to access staff's My Reports page and SQL Query Tools. The Reports Options page is divided into four sections that you can expand and collapse by clicking the heading or plus/minus sign symbols on the right side of the page.

To access the Reports Options page:

- From the left navigation menu, click **Reports**. The Reports Options page displays. By default, the Report Tools and Reports Menu sections are expanded (see figure below).
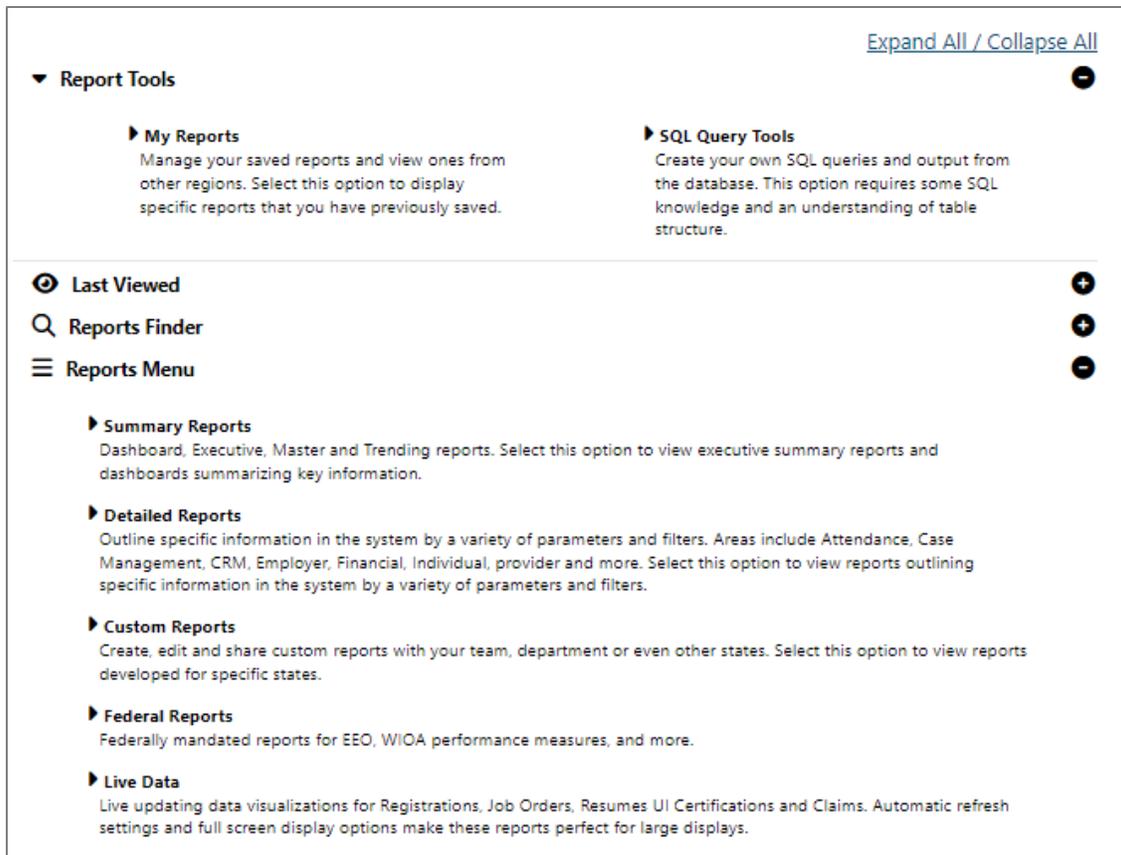
Reports Options Screen Sections

These sections are briefly described below and covered in greater detail in the sections that follow:

- **Report Tools** – Provides access to My Reports and SQL Query Tools. (My Reports is still accessible directly from the left navigation menu.)

- **Last Viewed** – Contains links to both your last-viewed Reports and last-viewed Ad-Hoc Queries.

- **Reports Finder** – Displays search criteria fields allowing staff to search for reports by keyword or by drilling down into groups, categories, and subcategories. The results table

displays the Report Title (hyperlink), Report Path, and Description.

- **Reports Menu** – Displays all reports available to the user in the system. Use the arrow symbols to expand and drill down into the reports taxonomy until you find the desired report link.

Report Tools Section

The Report Tools section provides access to your My Reports area and to the suite of SQL Query Tools.
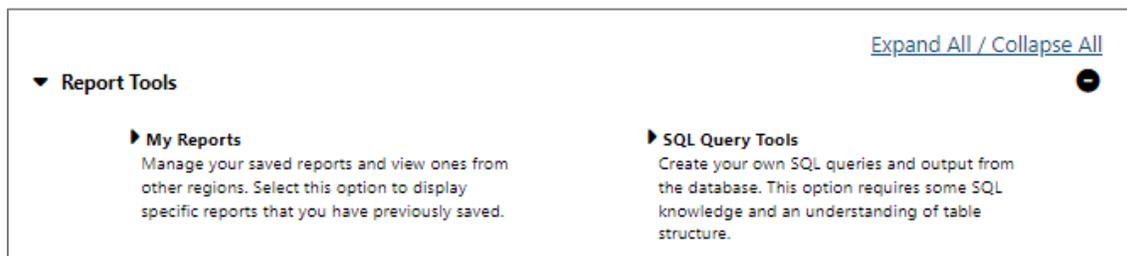
Report Tools Section of Reports Options Page

This section contains links to the following:

- **My Reports** – Manage your saved reports and view ones from other regions. Select this option to display specific reports and SQL queries that you have previously saved. For more information, see the My Reports Category topic.

- **SQL Query Tools** – Create your own queries and output from the database. Use of these tools requires special privileges and some SQL knowledge, with an understanding of database table structure. For more information, see the SQL Query Tools section.

Last Viewed Section

The new Last Viewed section lists the last few reports and Ad-Hoc Queries you ran.

Last Viewed Section Provides Links to Your Last Viewed Reports and Ad-Hoc Queries

Reports Finder Section

The Reports Finder feature offers two search methods: by keyword or by locating a report by its location in the report's taxonomy, including report type, group, category, and subcategory.

Searching for Reports by Keyword in Reports Finder Section

**Searching for Reports by Drilling Down into Reports Taxonomy
in Reports Finder Section**

Report Generation

Training Objectives

After completing this lesson, you will be able to:

- successfully generate reports.

- utilize report output features such as emailing and printing reports.

The process to generate reports is the same, regardless of the report a user generates. Users make a choice from the Report Options screen and then select a specific report within that category. Selecting a specific report may open a page that allows the user to further refine the report. All reports come with controls that let the user define filters and parameters, before generating the final report.

Each report offers a wide variety of filtering criteria to help fine tune the data, depending on the report. These criteria may include demographics, client groups, and supportive service options, including the ability to report by state, ZIP Codes, city, county, Metropolitan Statistical Area (MSA), legislative district (if configured), etc. The system can report, where appropriate, by office, contractor, local areas, regions, and the entire state. The filters within the report will vary, based upon the relevant information provided in the system. Some reports contain more than 100 filterable items.

Selection Criteria

Report Type

Report Type: | LWIA/Office Location ▾

Program

Program: | Title III - Wagner-Peyser (WP) ▾

Customer Group:
```
None Selected
JVSG
MSFW
Self-Service/Registered Individual Only
```

Location

State Region Status: ◉ Active ○ Inactive ○ All

State Region:
(Press Ctrl to select multiple items)
```
State Region 1
```

Region/LWDB Status: ◉ Active ○ Inactive ○ All

Region/LWDB:
(Press Ctrl to select multiple items)
```
None Selected
Alamo WF Board
Borderplex WF Board
Brazos Valley WF Board
Cameron County WF Board
```

Office Status: ◉ Active ○ Inactive ○ All

Office Location:
(Press Ctrl to select multiple items)
```
None Selected
```

Case Assignment

Group Status: ◉ Active ○ Inactive ○ All

Case Manager Group: | None Selected ▾

Case Manager Status: ◉ Active ○ Inactive ○ All

Assigned Case Manager:
None Selected ▾   Select Me

Date

Date Range: | Last 7 Days ▾

From: | 08/26/2023 📅 (MM/DD/YYYY)

To: | 09/01/2023 📅 (MM/DD/YYYY)

Reset Dates

Run Report

[Save to My Reports]

[Select Another Case Load Report]

Sample Filter Criteria Screen

The WIT system includes a wide variety of standard reports. Most of these reports include basic functionality that enables staff users to:

- View a total record count and a total percentage amount when generating summary report data.

- View the applicable filters applied to the report at the top of the report results page.

- Sort data by column headings and sort column by column, in both ascending and descending order.

- Choose the number of records to display per page.

- Export the report results into any of the following formats: Excel, Text, CVS, PDF, and Graph capabilities, when applicable.

- Save the report to run it again quickly without having to reapply the filters each time.

- Select report output, in the form of hyperlinks on detailed list reports, to access a specific individual or employer's record (provided the staff user has the appropriate security privileges).

- Print the report by clicking the print icon or by exporting the report and printing from that application (e.g., Adobe PDF).

Regardless of the report type (summary report, detailed report, or custom report), the outputs for all WIT reports are consistent in their look, feel, and content. Most reports contain the following consistent elements:

- Title – The title of the report will show above the report body, centered and in bold typeface.

- Heading – The heading will include the date filters for the report and any other filter selected for the report.

- Body of the Report – The report will display in table format with a black, 1-pixel outline. The header, sub header, data, and total rows will have different background colors. Text cells are left justified and numeric cells are right justified. Numeric cells contain commas as appropriate. Dollar amounts will include a dollar sign.

- Report Footer – Each report will contain display the ability to change the report criteria, select another report, or return to the main Reports menu.

Saving a Report

To save report criteria to My Reports for convenient access:

1. Find and run the report you want to save to My Reports.

2. On the Selection Criteria page, ensure the options are the way you want them stored.

3. Scroll down to the bottom of the page and click the **Save to My Reports** link. A Report Summary pop-up window displays (see figure below).
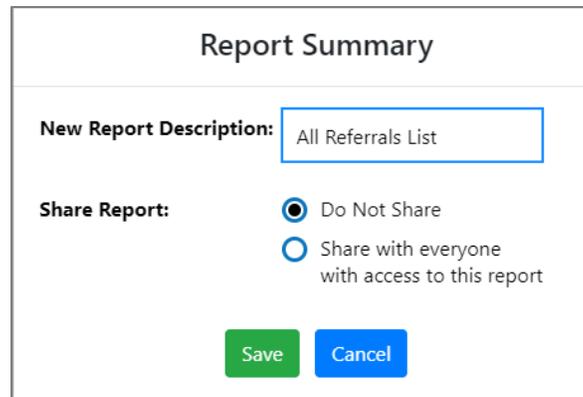
Report Summary Pop-up Window

4. Enter a short, descriptive name for the report, which will display in the My Reports list.

5. Select whether to share the report, which makes it available to staff in your office or LWDB who have access to that report.

6. Click **Save**. This saves the report with your name and with all filtering, sorting, and other options that were selected.

Exporting a Report

Staff can export most reports to popular file formats, including Word, Excel, Power Point, PDF, CSV (comma delimited), XML, etc.

To export a report:

1. Find and run the report you want to export.

2. On the report results page, click the disk icon in the toolbar above the report title and select the appropriate file format (see figure below).

Report Export Format Options

Depending on your browser settings, the file may be downloaded or open in a separate browser window.

My Reports Category

The My Reports category is a repository for system reports and Ad Hoc reports you generated and chose to save, as well as those system reports and Ad Hoc reports your colleagues generated and chose to share with authorized staff such as yourself.

To retrieve the report presets saved to My Reports:

1. From the left navigation menu, in the **Reports** group, click the **My Reports** link (see figure below).
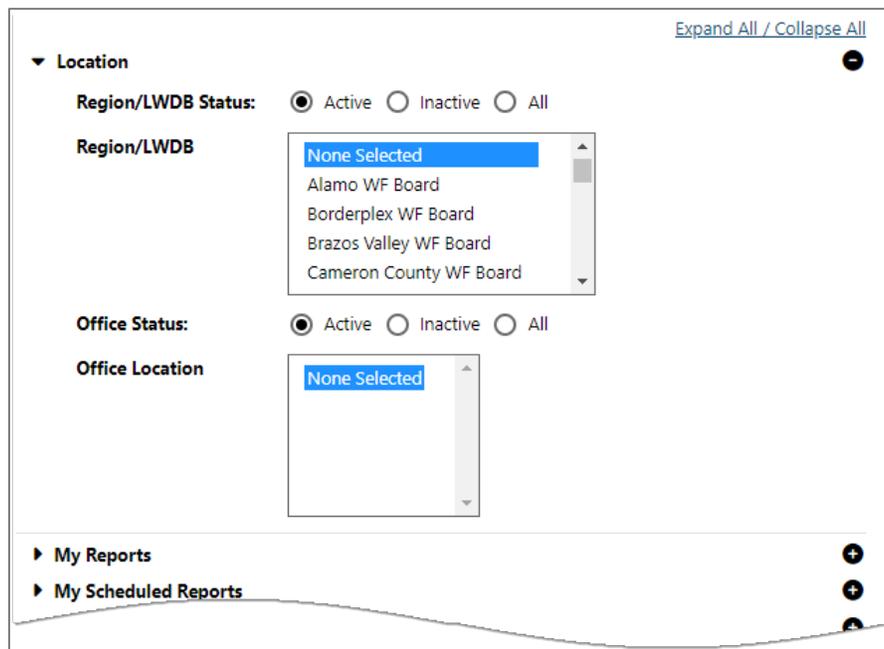
Report Options Page – My Reports Section

2. (Optional) Staff can filter their saved reports by selecting a Region/LWDB and corresponding office.

3. Click the **My Reports** ribbon to expand that section of the page. A list of your saved reports displays (see figure below).
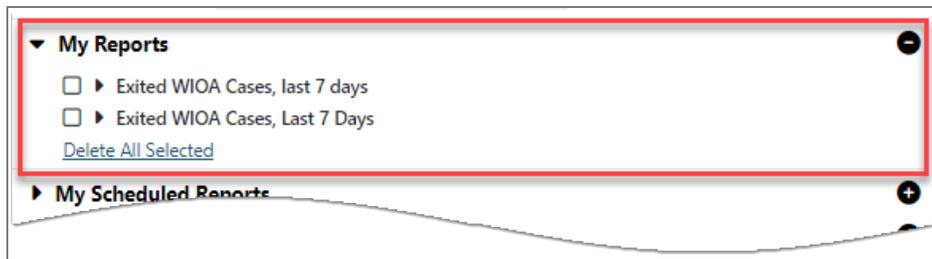
My Reports Page with Saved Reports

From this view, you can select a desired checkbox and click **Delete All Selected** if you want to remove any saved reports.

To access other options available, click a desired report title (see figure below). In response, WIT will expand the section to display the hyperlink options.
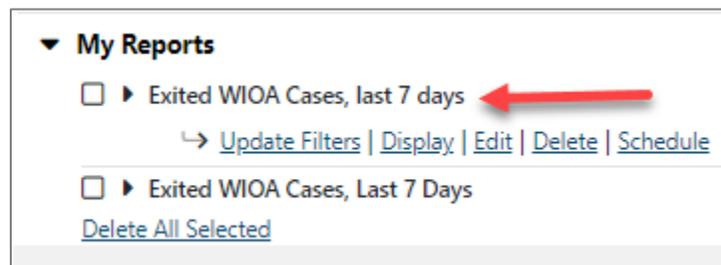
Selecting a Report Tile to Access More Options

You can perform the following actions by clicking the appropriate link on the corresponding row to manage your saved reports:

- **Update Filters** – Displays the Selection Criteria page populated with the stored settings for this report. You can change the parameters for the report.

- **Display** – Displays the report results. This is the same as clicking the Run Report button from the Selection Criteria page.

- **Edit** – Displays the Report Summary pop-up window, where you can modify the report description or change whether the report is shared with others in your office.

- **Delete** – Lets you delete the report after confirming **OK**. To delete multiple reports, select their preceding checkboxes and click the **Delete All Selected** link(s) beneath the saved report titles.

- **Schedule** – Displays a scheduling page, where you can schedule the report to run automatically by defining:

  o Who the report is emailed to with the Email To field (optional).

  o How often the report generates with the Frequency fields.

  o For how long the scheduled report will be generated with the Duration fields.

  o What type of file is generated for the report with the Report Format field.

  o Date range for the report with the Report Date field.

You can view your scheduled reports and delete them in the My Scheduled Reports section of the My Reports page.

The following figure displays the My Reports screen with all corresponding title bars closed. Staff may simply click to expand any bar to utilize a desired feature.
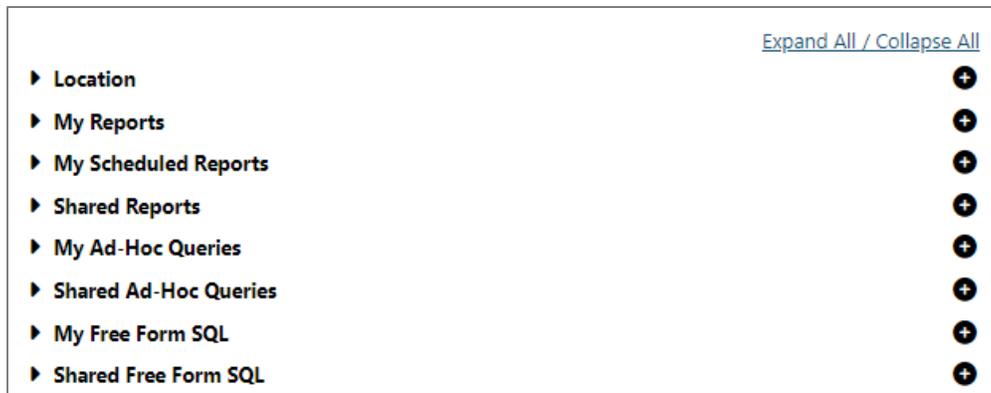
My Reports Page with All Sections Collapsed

Additional title bars displayed as expandable/collapsible rows within the My Reports screen include the following:

- **Location** – Enables staff to filter their saved reports by region and/or office affiliation.

- **My Reports** – Maintains all the reports that you saved.

- **My Scheduled Reports** – Maintains all the saved reports that staff has scheduled to be generated by the system automatically.

- **Shared Reports** – Maintains all the saved reports that staff has shared with other authorized staff such as yourself.

- **My Ad Hoc Queries** – Maintains all the ad hoc query reports that you generated and saved.

- **Shared Ad Hoc Queries** – Maintains all the ad hoc query reports that staff has generated, saved, and has shared with other authorized staff such as yourself.

- **My Free Form SQL** – Maintains all the free form SQL query reports that you generated and saved.

- **Shared Free Form SQL** – Maintains all the free form SQL query reports that staff has generated, saved, and shared with other authorized staff such as yourself.

Similar to how you can manage link options within the My Reports ribbon, you can manage link options for saved reports in the other ribbons, too. For example:

- To delete multiple saved reports, click the desired checkbox(es) and then select the **Delete All Selected** link.

- To perform additional tasks (for example, to **update report filters**; to **display** the report; to **edit** the report title and/or sharing option; to **delete** the report; to create a report **schedule** for the system to automatically execute), select the report title and choose the hyperlink option that now displays beneath the report title.

Summary Reports Category

These reports provide quick summaries of activity totals for a defined period of time and for a selected LWDB Region or one-stop location. These reports offer quick access to information such as the number of registered individuals and employers, staff activity summary, or a monthly comparison of job openings.

Summary Reports Menu

The Summary Reports category include:

- **Dashboards** – These reports use tables, charts, and/or graphs to display summary information about individuals, employers, job orders, and programs.

- **Executive** – These reports include summary information on employment statistics, services provided, job postings and placements, training programs, etc.

- **Master Summary** – These reports include statistical summaries and totals regarding activities by LWDB, by office, by staff member, etc.

- **Trend** – These reports offer data on workforce trends and comparisons between various elements (e.g. comparisons of employers, job openings, etc.).

Note: The data contained within these reports is extracted from cubes pulling data for all users created during the prior two years from the current calendar year to the current date for up to a

period of three calendar years (Past 2 Years + YTD). With each change in the calendar year, the initial collection year increments one year to start the next two-year period of extraction up to current date.

Dashboard Reports

Dashboard reports are divided into three categories and offer information on some of the most frequently used pieces of information staff need in the course of their daily work.

The following figure displays the Dashboard Reports menu.

▼ Dashboards
View dashboard reports documenting specific data on activity by: grant, jobs (openings, orders and referrals), and registered accounts (individual and employer).

▼ Grant
These reports provide data on youth or adult dislocated worker training activity by grant, and enrollment activity by grant.

Adult, DW Activity Dashboard   Enrollment Dashboard
Youth Activity Dashboard

▼ Job
View reports displaying data on job openings, job orders, and job referrals.

Total Job Openings Dashboard   Total Job Orders Dashboard
Total Job Referrals Dashboard

▼ Registered Users
Reports offering information on registered individuals and employers.

Registered Employer Dashboard   Registered Individual Dashboard

Dashboard Reports Menu

The Dashboard Reports category is broken down into the following subcategories:

- **Grant** – The reports in this category display data on youth or adult dislocated worker training activity by grant, as well as enrollment counts by grant.

- **Job** – The reports in this category provide data on job openings, job orders, and job referrals.

- **Registered** – The reports in this category offer information on registered individuals and employers.

The following figure displays a sample Enrollment Dashboard Report:

Regional Planning Unit = ALL
Lwia/Region = ALL
Office = ALL
Date Type: by Create Date
Start Date: 2002-11-03
End Date: 2022-11-09

Funding Group	Grant Description	Enrollments
Adult		162
Dislocated Worker		44
Statewide Dislocated Worker		6
Youth		17
Youth - ARRA (Stimulus) INACTIVE		2
National Dislocated Worker Grant (NDWG)	BZ NDWG	3
Statewide Adult	BZ Statwide Adult Grant 1	1
National Dislocated Worker Grant (NDWG)	OJT	1
Adult	Test Grant	44
Dislocated Worker	Test Grant	16
Youth	Test Grant	6
Total:		302

ENROLLMENT by GRANT

Sample Dashboard Report – Enrollment by Grant

Executive Reports

Executive reports offer monthly or annual statistics on industry employment, services, job postings, placements, referrals, training programs and services. They include general *Executive* reports and Program Management reports.

Executive Reports Menu

Executive reports open immediately when you click title link (on the Executive Reports page). For many executive reports, you can then filter the report after it displays by clicking the fly-out **Filters** tab at the top, right of the page. Clicking the fly-out **Filters** tab opens a fly-out Filter section where users can set the filtering parameters for the display.

The following figure displays a sample Executive – Facilitated Services Report:
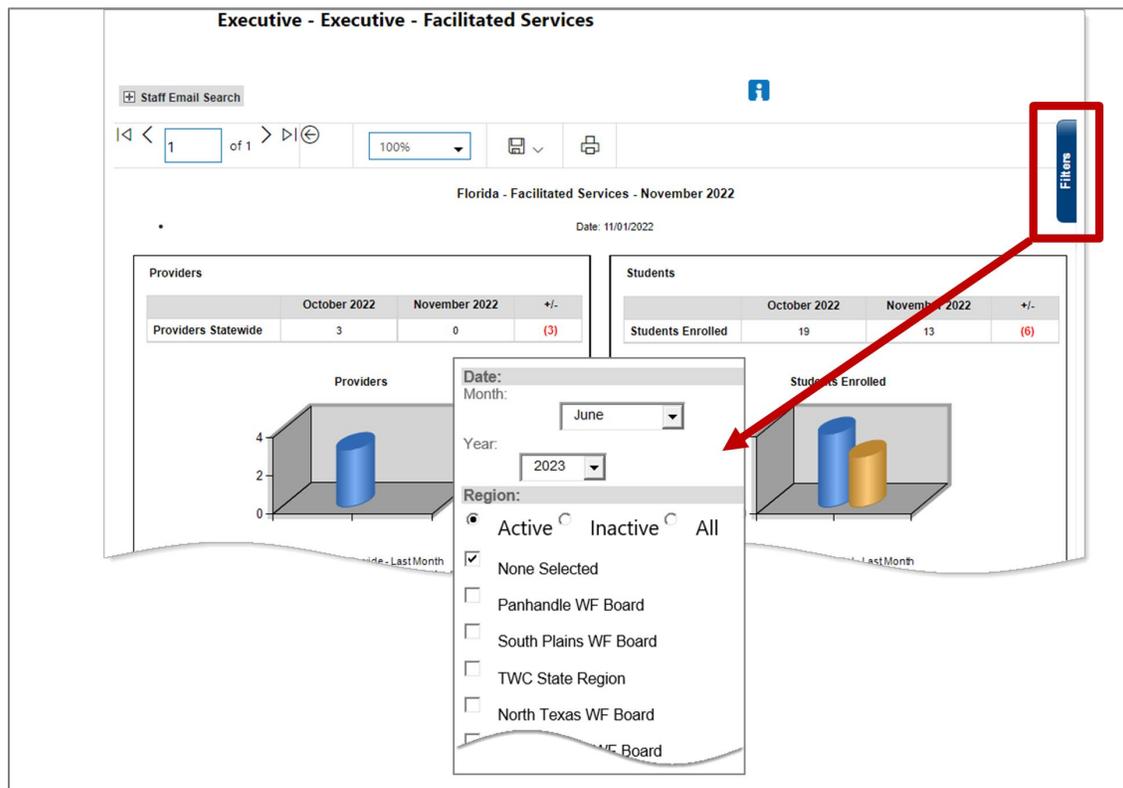
Fly-out Filter Tab & Filter Options

Some Executive reports include information in tables and some offer links (e.g., the Job Placements report shown below). On the Job Placements report, expanding the link (by clicking the plus sign) displays the Region data. Expanding the Region link displays the Office data. (Simply clicking on the link in the *Year* column lets the user toggle between annual and monthly job placements data).

Year	Region	Office	Internal Job Placements	External Job Placements	Total Job Placements	% Direct Placements
⊞ 2007			72,002	15,112	87,114	712.00%
⊞ 2008			67,125	22,552	89,677	10000.00%
⊞ 2009			58,551	27,266	85,817	10000.00%
⊞ 2010			65,368	39,675	105,043	10000.00%
⊞ 2011			53,043	81,989	135,032	10000.00%
⊞ 2012			58,455	234,340	292,795	0.00%
⊞ 2013			59,772	49,400	109,172	7109.00%
⊞ 2014			65,654	34,094	99,748	6538.00%
⊞ 2015			75,233	30,215	105,448	0.00%
⊞ 2016			75,284	30,915	106,199	6750.00%
⊞ 2017			69,438	26,761	96,199	6741.00%
⊞ 2018			30,194	19,394	49,588	6037.00%
⊟ 2019			20,807	16,086	36,893	6656.00%
	⊞ CareerSource Brevard		219	436	655	
			139	261	400	
			394	457	851	
	⊞ CareerSource Broward		1	0	1	
			105	67	172	
			203	153	356	
			512	123	635	
	⊞ CareerSource Capital Region		137	182	319	
			46		98	

Job Placements Reports Page – Table Links

Master Summary Reports

The Master Summary reports include statistical summaries and totals regarding activities by LWDB, by office, by staff member, etc. The Staff Activity Summary shows activity by staff and can be sorted by federal program. It shows the number of individuals staff assisted, job orders they created, and referrals they made. The Detailed Master Summary reports, as expected, show more information than the other Master Summary reports.

▼ **Master Summary**
View activity counts by: LWIA, region, office, month, staff, and programs. For a broad overview, select the Detail Master Summary report, or analyze trends using the Activity Trend report.

    ▼ **Master Summary**
    Reports displaying statistical summaries and totals for activities by LWIA, office, staff member and more.

Activity by Region Summary	Activity Summary by Month
Activity Trend	Detail Master Summary
Detail Master Summary by LWDB	Detail Master Summary by Office
Master Summary	Master Summary by LWDB
Master Summary by Office	Programs Summary
Staff Activity Summary	

Master Summary Reports Menu

Some reports contain links to drill down to more detailed information, although the Detail Master Summary Report by LWDB below does not.

The following figure displays a sample Detail Master Summary by LWDB report:

Detail Master Summary Report by LWDB	
State Region: State Region 1	
Region/LWDB : All	
Office: All	
Date Range: 01/01/2023 - 06/15/2023	
Report Run Time: 6/15/2023 4:58:31 PM	
Summary	**Total**
INDIVIDUAL AND TOTAL SERVICES	
Individuals that Registered	
0 - Not Available	1
03 - North Texas WF Board	1
06 - Dallas WF Board	2
08 - East Texas WF Board	2
14 - Capital Area WF Board	8
20 - Alamo WF Board	2
26 - Central Texas WF Board	2
28 - Gulf Coast WF Board	12
Information Not Provided	1
Total number of Individuals that Registered	31
Distinct Individuals Receiving Services	
01 - Panhandle WF Board	5
04 - North Central WF Board	1
05 - Tarrant County WF Board	1
06 - Dallas WF Board	3
07 - Northeast Texas WF Board	1
14 - Capital Area WF Board	11
17 - Deep East Texas WF Board	1
20 - Alamo WF Board	2
25 - Texoma WF Board	1
28 - Gulf Coast WF Board	13
Total number of Distinct Individuals Receiving Services	39

Sample Detail Master Summary by LWDB Report

Trend Reports

Trend reports let staff analyze trends in individual and employer registrations, compare individuals or employers registered within certain time frames, and evaluate job opening trends and comparisons. The reports are divided into three categories – Monthly, Quarterly, and Yearly.

- **Monthly** – These reports compare the selected item (e.g., individuals, employers, etc.) month-over-month and display trend data by month.

- **Quarterly** – These reports compare the selected item (e.g., individuals, employers, etc.) quarter-over-quarter and display trend data by quarter.

- **Yearly** – These reports display compare the selected item (e.g., individuals, employers, etc.) year-over-year and display annual trend data.

The three subcategories of Trend reports are:

- **Job** – These Trend reports display trends or comparisons of job openings, job orders, and referrals.

- **Registered** – These Trend reports display trends or comparisons of registered employers.

- **WIOA Activity** – These Trend reports display trends or comparisons of WIOA program activities by participants.

The following figure displays the Trend Reports Menu.

Trend Reports Menu

The following figure displays a sample Registered Individual Monthly Trend Forecast report.
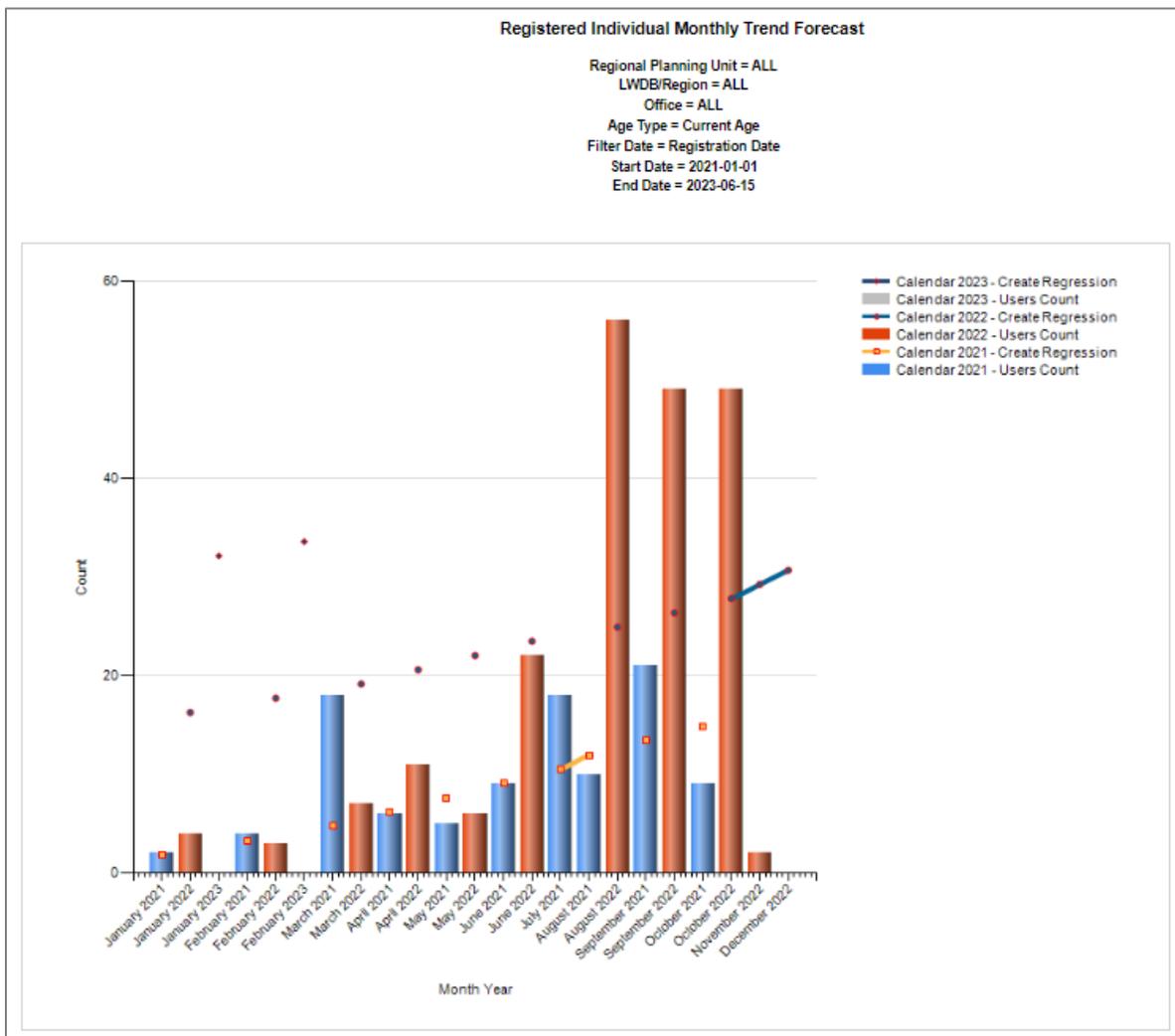
Sample Registered Individual Trend Forecast Report (Monthly)

Detailed Reports Category

The WIT system includes an extensive number of Detailed Reports, which include reports on administrative, case management, employer, financial individual, provider, services, and staff efficiency. These are not the state and federally required reports; however, they include numerous reports that are very useful to staff members for case management, assessing performance data, or for analyzing specific data on individuals, employers, résumés, activities, and other information available within the system. Most reports options include many subcategories of reports, as indicated in the figure below.

The following figure displays the Detailed Reports menu.

▼ **Detailed Reports**
Outline specific information in the system by a variety of parameters and filters. Areas include Attendance, Case Management, CRM, Employer, Financial, Individual, provider and more. Select this option to view reports outlining specific information in the system by a variety of parameters and filters.

▶ **Administrative Reports**
Administrative reports for staff alerts, staff by privilege group, and staff services.

▶ **Case Management - Program Specific**
Reports grouped by a specific federal or local program containing detailed information unique to that program.

▶ **Case Management Reports**
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

▶ **Employer Reports**
The Employer Reports group provides data such as internal and external job order information, employer registration information, job referrals and more.

▶ **Financial Reports**
The Financial Reports group includes reports for managing Individual Fund Tracking (IFT).

▶ **Individual Reports**
The Individual Reports group provides data on registered or enrolled individuals, mainly from information provided by individuals to the system.

▶ **Services Reports**
View reports providing data on staff-provided services to either individuals or employers.

▶ **Staff Efficiency & Tracking Reports**
Track services associated with events, system measures, messaging, and survey results.

Detailed Reports Menu

The following sections briefly describe the various types of Detailed Reports available.

Administrative Reports

The Administrative reports category offers report titles to provide information that management or organizational staff would want to know, including the activities that staff do and do not execute. The figure that follows displays the Administrative Reports menu.
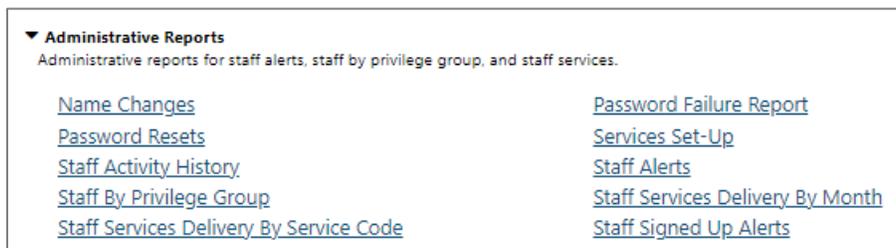
Administrative Reports Menu

The following figure displays a sample Staff Signed Up Alerts report.

Staff User ID	First Name	Last Name	Job Title	LWDB Region	Alert ID	Alert Name	Date Created	Staff Status	Alert Days	Notification Type
29274	Tim	Thompson	WTP Case Manager	Panhandle WF Board	103	Choices Sanction overdue from HHSC	05/02/2023	Active	0	N/A
2100	GSI	Staff	Job title	State Staff	100	SNAP sanction (penalty) Disposition entered	06/16/2023	Active	0	N/A
2100	GSI	Staff	Job title	State Staff	101	SNAP Good Cause about to expire	06/16/2023	Active	30	Everyday after
2100	GSI	Staff	Job title	State Staff	102	Sanction overdue from HHSC	06/16/2023	Active	0	N/A
Staff User ID	First Name	Last Name	Job Title	LWDB Region	Alert ID	Alert Name	Date Created	Staff Status	Alert Days	Notification Type
Total Alerts 4										

Sample Staff Signed Up Alerts Report

Case Management – Program Specific Reports

The system includes case management reports, organized by a specific federal or local program, that detail information unique to the program. These include reports on caseloads and activities, client actions, active program enrollments, and other valuable information. The figure that follows displays the Case Management – Program Specific Reports menu.

Case Management – Program Specific Reports Menu

The types of reports shown in each section correspond to the WIT system modules in place.

Generic Programs Reports

The Generic Programs category is also called the Agency Defined Programs category. The module enables authorized staff working as a system administrator user type to create custom program forms. These forms collect desired applicant information as

required by the State, local workforce boards, or both. Once the program forms are in place, staff who manage generic (aka, agency defined) programs will manage client enrollment in these programs in much the same way they would for a federal program, in terms of the program workflow and staff's ability to track fundable services provided through these generic programs. The figure that follows displays the Generic Programs Report menu.
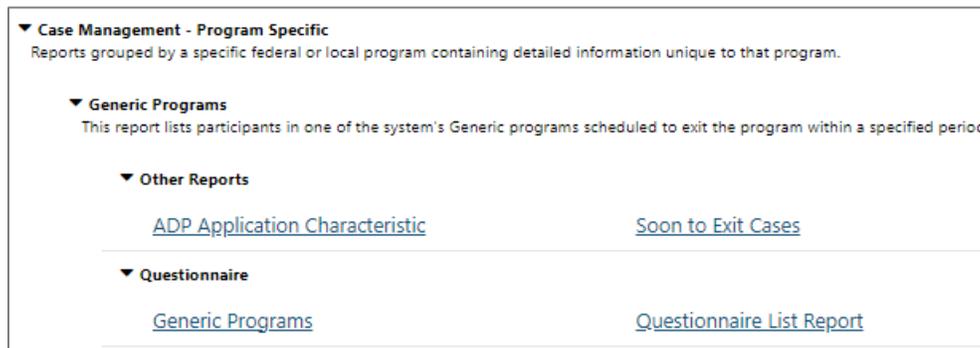
Generic Programs Report Menu

The following figure displays a sample Generic Programs report:

Sample Generic Programs Report

SNAP Reports

Staff may generate SNAP program reports working from the SNAP menu.

▼ **SNAP Employment and Training**
Reporting for the Supplemental Nutrition Assistance Program, displaying data on enrollment, user counts, case assignment, and 583.

Appointments to be Scheduled	Assigned or Unassigned Cases
Block Grants Annual Summary	by Component
Component Enrollment	Deregistered by DHS
DHS Import Errors	DHS Notification
DHS Referral Report	Management Report
Outreach Report	Participant Performance Report
Participation Requirements	Sanctions Initiated
SNAP Employment and Training 583 For Block Grants	Work Registrants and Placements

SNAP Program Reports Menu

The following figure displays a sample SNAP program report.

App ID	State ID	Case Number	Last 4 SSN	Last Name	First Name	Application Date	Office Location	Case Manager	Participation Type
9863	10358		5873	Test	Melissa	04/11/2023	939 WF SOL Dallas Pleasant Grove	Dallas, 161	Voluntary - Gen Pop
App ID	**State ID**	**Case Number**	**Last 4 SSN**	**Last Name**	**First Name**	**Application Date**	**Office Location**	**Case Manager**	**Participation Type**

Total Rows: 1 Unique App IDs: 1

Sample SNAP Assigned or Unassigned Cases Report

Trade Adjustment Assistance (TAA) Reports

Staff may generate Trade program reports working from the Trade Adjustment Assistance menu.

Trade Adjustment Assistance (TAA)
Trade reports displaying data on participants, petitions and petition number, TAA follow-up, and more.

List	by TAA Decision Date
by TAA Employer	by TAA Petition Number
Layoff TAA Petition by Employer	Potential RTAA Eligible Individuals
TAA Beyond 30 Day Enrollment Period List	TAA Customer Group
TAA Eligible Customers Outreach	TAA Enrolled individuals with Expired Work Authorizations
TAA Enrollments Report	TAA Follow Up Details & Summary
TAA Follow Up Employment	TAA Incumbent Worker Report
TAA Participant Followup Service	TAA Revocation Waiver
TAA Training Payment	TAA Waiver
TAA Waiver Review by Calendar	TRA Payment Details
TRA Payment Report	

Trade Program Reports Menu

The following figure displays a sample Trade program report:

Employer	Total Workers Affected
GSI NH	1
Test Employer	1
Grand Total:	2

Sample Layoff TAA Petition by Employer Report

Wagner-Peyser Reports

Staff may generate Wagner-Peyser program reports working from the Wagner Peyser menu.

Wagner-Peyser
Reporting for Wagner-Peyser displaying data for ineligible applications, and participant tracking by layoff date and employment entered by assistance or self-service.

Entered Emp Self Service vs Staff Assisted	Incomplete Applications with Participation Activity
Ineligible Applications	Migrant Seasonal Farmworkers
Registration by Layoff Date	Reportable Individuals
WP Verifications	

Wagner-Peyser Program Reports Menu

The following figure displays a sample Wagner-Peyser program report.

LWDB/Region	Office	Number of Applications	Percent
⊞ Worknet Pinellas, Inc.		6	100.00%
LWDB/Region	**Office**	**Number of Applications**	**Percent**
Grant Total		**6**	**100.00 %**

Sample Wagner-Peyser Reportable Participants Report

WIOA Title I Reports

Staff may generate WIOA program reports working from the WIOA Title 1 menu.

▼ WIOA Title I
Reports organized by specific federal WIOA program groups displaying detailed data unique to WIOA programs.

Compliance Monitoring	Credentials for WIOA ETP Performance
Customer Group	Dislocated Worker Projected Layoff Date
Dislocated Workers by Dislocation Event	Follow Up Details & Summary
Follow Up Employment	Follow-Up By Contact Attempts
On-Line Characteristics	Outcomes by Highest Service Level
Participant Followup Service	Participants by Training Occupation and Geography Area
Priority Summary - Adult	Priority Summary - Dislocated Worker
Selective Service Candidacy	Staff Case Workload
Summary of First Services	Targeted Population Summary
Training Justification	

WIOA Program Reports Menu

The following figure displays a sample WIOA program report.

Priority Level	Total Eligibility Priority	Enrolled Priority	Difference	% Eligible	% Enrolled	Received Ind. Career Svc or Training	% Ind. Career Svc or Training	Priority of Service Rate
1 - Veterans and Eligible Spouses who are Public Assistance Recipient OR Low Income OR Basic Skills Deficient	0	0	0	0.00%	0.00%	0	0.00%	0.00%
2 - Non-Covered Persons who are Public Assistance Recipient OR Low Income OR Basic Skills Deficient	2	1	1	100.00%	100.00%	0	0.00%	0.00%
5 - Non-Covered Persons Outside the WIOA-Priority Groups	0	0	0	0.00%	0.00%	0	0.00%	0.00%
Totals	2	1	1	100.00%	100.00%	0	0.00%	0.00%
Priority Level	Total Eligibility Priority	Enrolled Priority	Difference	% Eligible	% Enrolled	Received Ind. Career Svc or Training	% Ind. Career Svc or Training	Priority of Service Rate

Total Rows: 3

Sample Adult Priority of Service Summary Report

WIOA Youth Reports

Staff may generate WIOA Youth program reports working from the WIOA Youth menu.

WIOA Youth Program Reports Menu

The following figure displays a sample WIOA Youth program report.

LWDB/Region Office	Total Youth Participant	Youth	Statewide Youth
⊟ Worknet Pinellas, Inc.	1	1	0
CareerSource Pinellas - 4444- Tarpon Spring center	1	1	0
LWDB/Region Office	Total Youth Participant	Youth	Statewide Youth

WIOA Youth Program Youth Enrollment Eligibility Report

Choices

Staff may generate Choices program reports working from the WTP menu.

▼ WTP
Reporting for transition programs from assistance toward employment displaying data on participation, activities, enrollments and services.

Choices Cooperation Notices	Countable Activities By Case Manager
Countable Activities By LWDB/Office	Engagement List - Individual Details
Engagement Summary By Case Manager	Engagement Summary By LWDB & Office
Limited Benefit Plan	Participant Characteristics
Participant Characteristics By ZipCode	Promise Job Annual Report
TANF Sample Attendance Tracking Report	WTP Attendance Record Summary
WTP Barrier Summary	WTP Case Load
WTP DSS TFA Report	WTP Events
WTP IEP Expiration Date	WTP IEP Plan Review Date
WTP IEP Report	WTP No Countable Work Activity
WTP Sanction Report	WTP Services

Choices/TANF Program Reports Menu

The following figures display a sample Choices/TANF program report.

LWDB	Office	State ID	WTP Client ID	Case Number	VOS App ID	Name	Participation Status	Participation Status Date
01-Panhandle WF Board	601 WF Solutions Panhandle	10358	999741258		9874	Test, Melissa	Active	5/2/2023
14-Capital Area WF Board	123 WF SOL Capital Area East	10333	867565646		9850	Tester, Test	Post TFA	4/27/2023
28-Gulf Coast WF Board	456 WF Solutions Northline	10364	223999777		9872	Test, Liliya	Active	4/14/2023
28-Gulf Coast WF Board	483 WF Solutions Humble	10383	905030215		9910	Skylar, Jennifer	Active	6/13/2023
LWDB	Office	State ID	WTP Client ID	Case Number	VOS App ID	Name	Participation Status	Participation Status Date

Total Rows: 4

Sample Engagement - Individual Details Report, part 1 of 2

⇳ Assigned Staff	⇳ Closure Date	⇳ Core Activities Only	⇳ Core+ Activities Only	⇳ Core And Core+ Activities	⇳ Deferred With Activity	⇳ Deferred With No Activity	⇳ Pre Penalty/ Pending Sanction With Activity	⇳ Pre Penalty/ Pending Sanction With No Activity	⇳ In Other Activities	⇳ No Activities for 15 Days	⇳ No Activities for 30 Days	⇳ No Activities more than 30 Days
Thompson, Tim		N	N	N	N	N	N	N	Y	N	N	N
Thompson, Tim		N	N	N	N	N	N	N	Y	N	N	Y
Houston, 194		N	N	N	N	N	N	N	Y	N	N	N
Not Assigned		N	N	N	N	N	N	N	Y	Y	N	N
⇳ Assigned Staff	⇳ Closure Date	⇳ Core Activities Only	⇳ Core+ Activities Only	⇳ Core And Core+ Activities	⇳ Deferred With Activity	⇳ Deferred With No Activity	⇳ Pre Penalty/ Pending Sanction With Activity	⇳ Pre Penalty/ Pending Sanction With No Activity	⇳ In Other Activities	⇳ No Activities for 15 Days	⇳ No Activities for 30 Days	⇳ No Activities more than 30 Days
		0	0	0	0	0	0	0	4	1	0	1

Sample Engagement - Individual Details Report, part 2 of 2

Case Management Reports

The system includes case management reports not related to federal reporting items that allow staff members to manage and quantify workloads. Local regions can manage their performance by using predictive reports that estimate performance based on wage data collected by staff, in real time.

▼ **Case Management Reports**
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

▶ **Case Status**
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

▶ **Documentation**
Case note and document management reports where staff can retrieve a case note in the system, multiple case notes sharing a common keyword, or documentation provided by program enrollees.

▶ **Predictive**
Reports to assist staff in predicting the reporting results and outcomes of data that parallels WIOA quarterly and annual reports.

▶ **Staff Referrals**
View reports on the services, follow-up activities, or training referrals made by staff. Track referrals by referral type, provider, or staff.

▶ **Training**
Reports displaying WIOA program training statistics by grant, office, provider, region/LWIA, and by staff assigned.

Case Management Reports Menu

The types of reports shown in each section correspond to the WIT system modules in place.

Case Load Reports

The Case Load reports, located within the Case Status section, provide a snapshot of various case management activities, such as program enrollment, case assignment, case closures, case notes, and other program data. Case load reports apply to all programs included in the WIT system.

Many Case Load reports include active links that will take staff to specific screens within the system. Staff privileges determine whether the staff user may access details of an individual's account profile by selecting a hyperlink displayed from the report. The figure that follows displays the Case Load Reports Menu.

▼ Case Management Reports
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

▼ Case Status
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

▶ Case Load ℹ️

Active Cases	Active Enrollment
Application	Assessment of Educational Functioning Levels
Assigned Case Load	Case Closure Employment
Case Closure Information	Case Closure Reportable Performance Indicators
Case Summary By Application Date	Closed Never Enrolled
Co-Enrollment Customer Groups	Co-Enrollment Summary
Credentials	Credentials Required
Days since Last Active Service	Eligibility Enrollments
Enrollment in Homeless Veterans Reintegration Program	Enrollment Summary By LWDB
	Exit Reason Summary
Exited Cases	Expiring Work Authorization
Hourly Wage Before and After Enrollment	Individual Barriers
Individual Disability	Measurable Skill Gains
Measurable Skill Gains Required	Obtained Employment
Participants by Training Occupation	Participants Co-enrolled in Partner Programs
Projected Begin Dates	Projected End Dates
Quarterly Follow Up Status	Soon to Exit Cases
Staff Assisted Summary	Staff Caseload by Program and Status
Summary	Targeted Measurable Skill Gain
Timeliness of Data Input	Training
Veteran Data Discrepancies	

▶ Eligibility Explorer ℹ️

List

▶ Non-WIOA - JFES/IEP ℹ️

IEP Objective Information	IEP Report

▶ OJT/Work Experience ℹ️

On the Job Training	Work Experience

Case Load Reports Menu

Case Status report titles are broken down into the following subcategories:

- **Case Load** – Applies to most every facet of case management activities and is therefore the most extensive subcategory displayed.

- **Eligibility Explorer** – Applies to the Eligibility Explorer module which enables individuals to select programs they are interested in applying for, provide basic information about themselves and their circumstances, and then submit the pre-application to one-stop center staff for evaluation and eligibility determination.

- **Non-WIOA, JFES/IEP –** This report category does not apply to WIT.

- **OJT/Work Experience** – Applies to individuals who receive On the Job Training (OJT) services and/or Work Experience (WE) services.

The following figure displays a sample Case Load report.

Last Name	First Name	Date of Birth	App	State ID	LWDB	Office	Program Name	Customer Group	Case Manager	Create Date	IEP Status	Exit Date	Exit Rea
Baggins	Frodo	05/02/1986	546	653	Gulf Coast WF Board	426 WF Solutions Huntsville	Title III - Wagner-Peyser (WP)	Self-Service/Registered Individual Only, Wagner-Peyser		11/18/2022		11/18/2022	Institutionalized
Baggins	Frodo	05/02/1986	1946	653	Gulf Coast WF Board	426 WF Solutions Huntsville	Trade Adjustment Assistance (TAA)	TAA	GSI,Staff	11/18/2022		11/18/2022	Institutionalized
GSIELTest	Jimmy	01/01/2000	2009	1049	Gulf Coast WF Board	406 WF Solutions Northshore	Title I - Workforce Development (WIOA)	Adult, Youth	Elizabeth,Lafontaine	06/18/2023		05/11/2023	Health/Medical
Jj	Aj	12/30/1976	1955	924	Gulf Coast WF Board	406 WF Solutions Northshore	Trade Adjustment Assistance (TAA)	TAA	GSI,Staff	03/13/2023		03/13/2023	Soft Exit (system set)
Jj	Aj	07/12/1976	1953	938	Gulf Coast WF Board	406 WF Solutions Northshore	Trade Adjustment Assistance (TAA)	TAA	GSI,Staff	03/13/2023		03/13/2023	Soft Exit (system set)
Last Name	First Name	Date of Birth	App	State ID	LWDB	Office	Program Name	Customer Group	Case Manager	Create Date	IEP Status	Exit Date	Exit Rea

Total: 5

Sample Case Load and Exited Cases Report

Documentation Reports

The Documentation reports group enables staff to search for documentation created as a case note for a client or obtained via uploading or scanning documentation. The following figure displays the Documentation Reports menu.
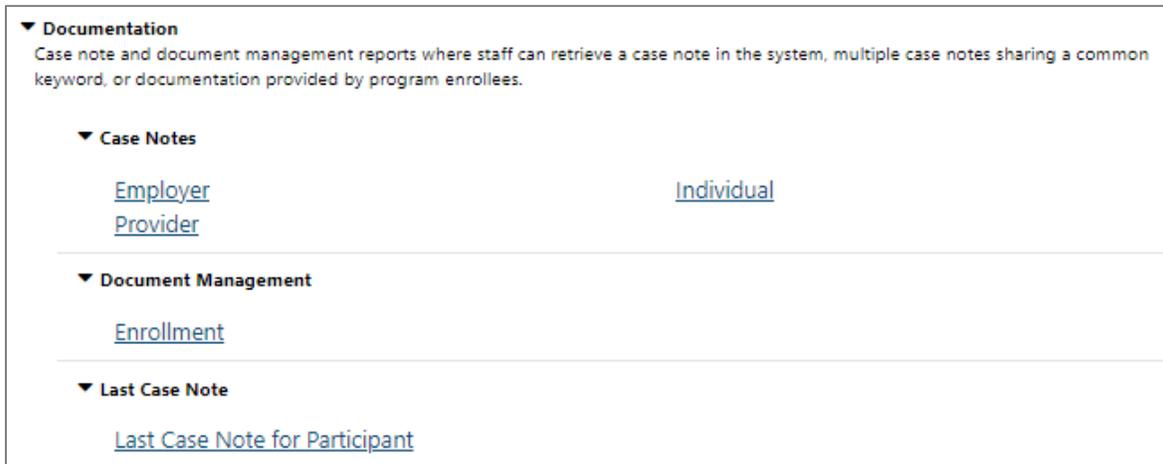
Documentation Reports Menu

Following is a sample Documentation report.

Emp ID	Company Name	Created By	Create Date	Contact Date	Last Edited By	Edit Date	Case Subject	Case Notes
				Case Management Report - Case Notes - Employer Case Notes Report				
				Report Type: Exact Match				
				Start Date: 11/16/2021				
				End Date: 11/15/2022				
				Report Run Time: 11/15/2022 9:54:21 AM				
1950	My Baseball Team	Thirty One, Staff	1/13/2022	1/13/2022	Thirty One, Staff	01/13/2022	114 Staff Assisted Job Search	Program specialist assisted customer with job search on 1/13/2022 via EFM.
2841	FCWD 2	Two, Staff	5/3/2022	5/3/2022	Two, Staff	05/03/2022	employer registration	Verified employer's registered with Sunbiz and spoke with Joyce Harris.
12141	Montessori Academy of the Upper Keys	Member Five, Staff	2/18/2022	2/18/2022	Member Five, Staff	02/18/2022	Reviewed	Job order was reviewed by Job Bank.
12162	Amigo Pallet	Alvarez, Victor	5/16/2022	5/16/2022	Alvarez, Victor	05/16/2022	E35 Placement	A placement has been entered on job order number 10573735 - TEST
12174	Heavenly Biscuits	Staff, Wdbtc	2/15/2022	2/15/2022	Staff, Wdbtc	02/15/2022	Informational session	On 2/15/2022 provided an informational session regarding substance abuse disorder and recovery in the workplace.
12196	Shirts for Less	Staff, Wdbtc	3/18/2022	3/18/2022	Staff, Wdbtc	03/18/2022	Job order creation-candidate prescreening-referred resume	On 3/18/2022 created new job order, verified specifics and conducted candidate prescreening. Reviewed and referred Douglas Curly as he meets the minimum requirements.
12196	Shirts for Less	Staff, Wdbtc	3/18/2022	3/18/2022	Staff, Wdbtc	03/18/2022	Job order creation- candidate prescreening- referred resume	On March 18th created new ob order, verified the specifics and conducted prescreening, reviewed and referred Edd Mister as he meets the minimum requirements.
12229	University Movers	Biggs, Marilyn	12/21/2021	12/21/2021	Biggs, Marilyn	12/21/2021	Job Order #10573835 Initial Contact	Received request to post a Mover Helper position from University Movers at $10-15 per h/r based on experience. Reviewed job description and salary range and completed job order form. Job Description Move freight, stock, or other materials to and from storage or production areas, loading docks, delivery vehicles, ships, or containers, by hand or using trucks, tractors, or other equipment. Sort cargo before loading and unloading. Attach identifying tags to containers or mark them with identifying information. Read work orders or receive oral instructions to determine work assignments or material or equipment needs. ...ations, such as transit sheds or in holds of...

Sample Employer Case Notes Report

Predictive Reports

The reports are provided to let staff generate unofficial reports related to the WIOA program rather than waiting for the quarterly or annual reports to be generated. These reports are an opportunity for staff to see how they are doing at a set point in time (e.g., the number of people they are serving, the number of people who have exited, etc.). This is in preparation for reporting for common measures that are carried out at a federal level.

The following figure displays the Predictive Reports menu.

Predictive Reports Menu

The following figure displays a sample Predictive report.

LWDB	Total	With Disability	Veteran	WP	JVSG	AD	DW	DWG	Youth	NFJP
15 - Tampa Bay Workforce Alliance	3	0	0	0	0	1	0	0	1	0
LWDB	Total	With Disability	Veteran	WP	JVSG	AD	DW	DWG	Youth	NFJP
Total Records:	3	0	0	0	0	1	0	0	1	0
Total Rows: 1										

Sample Predictive Report – WIOA Reportable Indicators

Staff Referrals

These reports provide information on the services, follow-up activities, or training referrals made by staff. Referrals can be made for federal and local programs in the WIT system. The following figure displays the Staff Referrals Reports Menu.

Staff Referrals Reports Menu

To display on this report, staff must create referrals to providers in the following way:

- **Assist an Individual > Staff's General Profile > Activities Tab > Staff Referrals to Providers**

The following figure displays a sample Staff Referrals report.

Individual User ID	Individual's name	Individual State ID	Referral Date	Referral Type	Staff Referred	Provider/ Partner	Provider Contact Name	Referral For	Referral Outcome	Special Program
9565074	Collins, Cohen	44791	10/31/2022	Support Service Referral	Thomas, Kim	Chipola College	Contact Person	Needs transportation assistance	Support Service Referral Result	
9565074	Collins, Cohen	44791	10/31/2022		Thomas, Kim	St. Petersburg College	Joe Hennessey	Training	NA	
9565074	Collins, Cohen	44791	10/31/2022		Thomas, Kim	Happy Workers Day Care Center	Miss Mable	Need to demo the referral	Successful Referral	
9565074	Collins, Cohen	44791	09/26/2022	Coordinated Child Care Referral	Thomas, Kim	Happy Workers Day Care Center	Ms. Spiers	Arrange Child Care	Child Care Arranged by Coordinated Child	

Sample Staff Referral Report List Report

Training Reports

The Training Reports display information about the individuals who have participated in training programs and the service providers who offer the training.

Training Reports Menu

The Training Reports include:

- **Alison Metrics** – This report shows the individuals who have taken online training courses through the Alison website.

- **Financial Aid** – This report displays Pell Grant recipients and includes links to the Staff's Profile screen. The report includes the activity code, projected and actual begin and end dates, and the type and amount of financial aid.

- **Metrix Online Training** – This report displays information for participants in online training courses provided by Metrix Learning.

- **Provider Funding** – This report enables staff to monitor ITA funding allocated for each training provider and review total obligated or paid amounts.

- **Training** – These reports display WIOA program training statistics with specific focus by grant, by office, by provider, by region/LWDA, and by staff assigned. Participants are listed as hyperlinks, which go to the Staff Profile tab for assisting individuals.

The following figure displays a sample Training report.

Customer Group	User ID	State ID	First Name	Last Name	Create Date	End Date	Provider	Course and Location	Cost	Completion Date
Adult	5343	1052	Testingpir	Woundedone	01/31/2023					
Customer Group	User ID	State ID	First Name	Last Name	Create Date	End Date	Provider	Course and Location	Cost	Com

Total Rows: 1

Sample Training List Report

Employer Reports

The Employer reports provide data such as internal and external job order information, employer registration information, and job referrals.

Employer Reports Menu

The Employer reports are divided into these categories:

- **Client Relationship Management (CRM)** – Reports within this category track appointments with employers and provide access to outcomes.

- **Contact** – These reports list contact information to assist staff members in contacting employers.

- **Equal Employment Opportunity** – EEO reports documenting employer, job order, and staff information, related to the demographics of applicants who applied for jobs from preferred employers.

- **Job Order** – This category includes reports for internal and external job orders, statistical reports for top job positions by O*NET code and NAICS sectors, and executive reports on suppressed job order data.

- **Questionnaire** – These reports track question sets customized for generic programs or created for a specific employer.

- **Referrals and Referral Results** – View reports listing details for job referrals by region, office, referring staff member, and referral type. Generate detailed reports for internal or external job order referrals or both at once.

- **Registered Employer** – These reports display the information provided by employers during system registration.

- **Security** – These reports are designed to assist staff in locating potentially fraudulent employers by reviewing data such as employer ID, or suspicious message activity.

- **WARN** – These reports display details of the layoff or closure associated with the WARN notice.

To learn more about these subcategories of Employer reports, please see the topics that follow.

CRM (Client Relationship Management) Reports

The system's Client Relationship Management (CRM) reports enable staff members to track appointments made with employers. The reports can be run by staff member, region, work item, etc.

CRM Reports Menu

The following figure displays a sample CRM List report.

Employer	Emp Id	Contact Name	City	State	Create Date	Lead Source	Map	Appt Total	% Total
PuppiesRGreat	4215	Test, Sandy	Austin	TX	03-09-2023		Map	0	0.00%
Test	4216	test, Test	Winter Garden	FL	03-10-2023		Map	0	0.00%
Nikyl & Dyme Accounting Test Company	4217	Juan-Synt, Tester	AUSTIN	TX	03-23-2023		Map	0	0.00%
ABC	4220	Derk, Kit	DALLAS	TX	04-11-2023		Map	0	0.00%
Employer	Emp Id	Contact Name	City	State	Create Date	Lead Source	Map	Appt Total	% Total
Total Rows: 4							Map All Records	0	100%

Sample CRM List Report

Contact Reports

These reports list contact information to assist staff members in contacting employers. These reports can be filtered by the employer's registration date or by the last date they accessed the system. Employer contact reports also can be generated by the associated job orders and job order referrals.

Contact Reports Menu

The following figure displays a sample Employer Contacts report.

Sample Contact Report – Employer Registration

Equal Employment Opportunity Reports

These reports document employer, job order, and staff information as they relate to the age, race, and ethnicity of applicants who applied for jobs from preferred employers.

> ▼ **Equal Employment Opportunity**
> EEO reports documenting employer, job order, and staff information, related to the demographics of applicants who applied for jobs from preferred employers.
>
> Employer   Job Order
> Job Order Deviation   Job Order Percentages
> OFCCP Employer Summary

Equal Employment Opportunity Reports Menu

The following figure displays a sample EEO report.

Management EEO Report - By Job Orders
- Job order status: Open and available
- Job order create date: 01/27/2014 - 04/02/2014

Job Order #	Job Title	Gender	Latino		White		Black/African American		American Indian/Alaskan Native		Asian		Native Hawaiian/Other Pacific Islander		Not Dislcosed		TOTAL	
			Applied	Hired	Applied	Hired	Applied	Hired	Applied	Hired	Applied	Hired	Applied	Hired	Applied	Hired	Applied	Hired
96	Accountant	Female	0	0	0	0	5	0	0	0	0	0	0	0	0	0	5	0
97	Accountant	Female	0	0	0	0	5	0	0	0	0	0	0	0	0	0	5	0
98	Accountant	Female	0	0	0	0	5	0	0	0	0	0	0	0	0	0	5	0
100	Dancer	Female	0	0	0	0	4	0	0	0	0	0	0	0	0	0	4	0
	Dancer	Male	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
101	Dancer	Female	0	0	0	0	4	0	0	0	0	0	0	0	0	0	4	0
110	Accountant Manager	Female	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
112	Accountant Manager	Female	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
114	accountant	Female	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
115	Cook with sharon	Female	0	0	0	0	3	0	0	0	0	0	0	0	0	0	3	0
	Cook with sharon	Male	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total			**0**	**0**	**0**	**0**	**26**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**26**	**0**

Sample Equal Employment Opportunity Job Orders Report

Job Order Reports

This category of Employer reports displays report titles for internal and external job orders, statistical reports for top job positions by O*NET code and NAICS sectors, and executive reports on suppressed job order data.

Job Order Reports Menu

Job order reports are broken down into the following categories:

- **Executive** – The two sub-categories in this section document pending referral requests and suppressed job order data.

- **External** – External Jobs are reported on only those jobs that are active at the time of the report being created. Attempting to re-run a report for a prior date will result in differences in numbers because an external job could have closed from the source's website.

- **Internal** – These reports document data from job orders created by preferred employers (employers who registered in the system) and external jobs (jobs that were imported from other job banks). More data can be collected from internal job orders, but some information can also be gleaned from external job orders.

- **Summary** – These reports summarize statistics, such as top job positions by O*NET code and NAICS sectors. The information incorporated here pertains to both external and internal jobs.

The following figure displays a sample Job Order report.

Job Title	Employer	Location	Salary	Salary Unit	OCC Code (O*Net)	ONet Occ Title	ONet Occ Group	ONet Group Title	NAICS Ind Code	NAICS Ind Title	Source	Post Date	Close Date
!!!! Hiring Immediately Maintenance Mechanic !!!	Not Available	Corona	20.00	Hour	99999999	N/A	99	Total other occupations	N/A	N/A	Private Job Board	3/31/2022	
!!NOW HIRING!! Dietary Positions, Calhoun	Georgia Culinary	Calhoun	N/A	N/A	99999999	N/A	99	Total other occupations	N/A	N/A	Job Distributor	3/23/2022	04/22/2022
"B" Machinist	RBC Bearings Incorporated	Compton	N/A	N/A	51404100	Machinists	51	Production Occupations	332991	Ball and Roller Bearing Manufacturing	Corporate	9/30/2021	
"Business Analyst"	Not Available	Chicago	N/A	N/A	15121100	Computer Systems Analysts	15	Computer and Mathematical Occupations	N/A	N/A	Private Job Board	8/19/2021	
"Data Analyst"	Not Available	Philadelphia	N/A	N/A	15205101	Business Intelligence Analysts	15	Computer and Mathematical Occupations	N/A	N/A	Private Job Board	6/25/2021	

Sample External Job Order Report

Questionnaire Reports

Questionnaire reports track information as questions sets customized for generic programs and questions set created for a specific employer.

Questionnaire Reports Menu

The following figure displays a sample Questionnaire report.

Sample Questionnaire List Report

Referral and Referral Results Reports

These reports list details for job referrals by region, office, referring staff member, and referral type. Generate detailed reports for internal or external job order referrals or both at once.

Referral and Referral Results Reports Menu

The Referral and Referral Results reports are divided into the following categories:

- **External** – These reports list job referrals from external or **spidered** jobs, which are imported into the WIT system. Data from these job referrals is limited.

- **Hire** – This report is designed to identify individuals that were hired resulting from internal job referrals and shows job referral services provided to individuals along with the

outcomes, including hire, negative referral result, or other. If an individual is active in more than one program, the report displays all the program codes, separated by a comma.

- **Internal** – These reports list job referral information for preferred employer jobs. These are also known as internal jobs.

- **Referral** – These reports list job referrals by region, office, referring staff member, and referral type.

- **Results** – These reports list job order referral results, where the outcome of the job order referral is known and documented.

The following figure displays a sample Referral and Referral Results report:

User ID	State ID	Service ID	First Name	Last Name	City, State & Country	Referral	Referral Type	Method of Referral Entry	Referring Office	Referring Staff	Referral Date
14009	2595	302991	Greta	Fleet	Mcallen, TX US	External Job Referral by Staff	Staff	Staff	601 WF Solutions Panhandle	GSI Staff	03/08/2023
14009	2595	302992	Greta	Fleet	Mcallen, TX US	External Job Referral by Staff	Staff	Staff	601 WF Solutions Panhandle	GSI Staff	03/08/2023
14009	2595	302993	Greta	Fleet	Mcallen, TX US	External Job Referral by Staff	Staff	Staff	405 Houston VA Regional Office	GSI Staff	03/08/2023
14009	2595	302994	Greta	Fleet	Mcallen, TX US	External Job Referral by Staff	Staff	Staff	405 Houston VA Regional Office	GSI Staff	03/08/2023
26321	8531	302997	Theresa	Portaltester	Austin, TX US	External Job Referral by Staff	Staff	Staff	405 Houston VA Regional Office	GSI Staff	03/10/2023
User ID	State ID	Service ID	First Name	Last Name	City, State & Country	Referral	Referral Type	Method of Referral Entry	Referring Office	Referring Staff	Referral Date
Total Referrals: 5											

Sample External Job Order Referrals List Report

Registered Employer Reports

These reports provide information about a selected group of employers or all the employers who have registered in the system. Most of the Registered Employer reports are based on data entered during registration by the employer or by staff working on behalf of the employer.

▼ **Registered Employer**
View information on employers registered in the system, using data provided during registration.

   ▼ **Access**

      by Access History   by Summary Access Status
      by Summary Employer History   List

   ▼ **Activity**

      Employer Activity

   ▼ **Apprenticeship**

      Completed Apprentices

   ▼ **Employer**

      by ADA Compliance   by Affirmative Action
      by Assigned Case Manager   by Assigned One Stop Location
      by Benefits Offered   by County/Parish
      by Employer Type   by Federal Contractor Status
      by Industry   by Industry Sector
      by Mailing Information   by Number of Employees
      by One Stop of Registration by Region/LWDB
      by Staff Created   by State
      by Worksite Locations   by Zip Code
      DOR Delinquent Employers Report List

Registered Employer Reports Menu

Registered employer reports are broken down into the following categories:

- **Access** – These reports document an employer's access rights, whether throughout their history with the system or currently.

- **Activity** – This employer activity report includes a Count of Résumé Views, Individual Job Seeker Views, Open Job Orders and Summary Counts of Total Activity between specified dates.

- **Apprenticeship** – This report displays completed apprenticeships by registered employer.

- **Employer** – These reports cover many sub-categories for filtering to see breakdowns (such as by Zip code, county, or number of employees). Most of these categories deal with questions that were asked during the two-page registration form for employers. The information provided by these reports presents information about a selected group of employers or all the employers who have registered in the system.

The following figure displays a sample Registered Employer report.

Registered Employer	Employer Site ID	Contact Name	City	State	Access Status	Registration Type	Registration Completed Date	Display Second Chance Status to Job Seekers	Map
PuppiesRGreat	4215	Sandy Test	Austin	TX	Enabled	Recruiting	03/09/2023	NA	Map
Test	4216	Test test	Winter Garden	FL	Enabled	Recruiting	03/10/2023	NA	Map
Nikyl & Dyme Accounting Test Company	4217	Tester Juan-Synt	Austin	TX	Enabled	Recruiting	03/23/2023	NA	Map
ABC	4220	Kit Derk	Dallas	TX	Pending Verification	Recruiting	04/11/2023	NA	Map
Registered Employer	Employer Site ID	Contact Name	City	State	Access Status	Registration Type	Registration Completed Date	Display Second Chance Status to Job Seekers	Map

Total Rows: 4

Sample Registered Employer List Report

Security Reports

These reports are designed to assist staff in locating potentially fraudulent employers by analyzing information such as the number of individuals they viewed or the number of messages they sent or received.

Security Reports Menu

Security Reports are broken down into the following categories:

- **IP Location** – These reports are designed to identify masked IP addresses, show primary worksite locations that do not have a latitude or longitude (possibly by using a fake address) and employers that register in one IP location but whose primary worksite is a significant distance away. These reports are designed to point out possible malicious employers so that staff can investigate them further.

- **Security** – These reports are designed to assist staff members in locating potential fraudulent employers and other customer groups by showing the number of individuals viewed and the number of messages they sent or received.

The following figure displays a sample Security Report

User ID	User Type	Emp/Staff Name	Company Name	Individual User ID	Individual	View Timestamp	Individual Detail Views	Resume Views	Resume ID	Resume Title
2144778268	Individual		THE DAMPER HAMPER QA TEST COMPANY	2144778925	Miles, Joe	5/10/2023 02:28:15	0	1	24670	Chef 2
2144778268	Individual		THE DAMPER HAMPER QA TEST COMPANY	2144778925	Miles, Joe	5/10/2023 02:28:20	0	1	24670	Chef 2
2144778268	Individual		THE DAMPER HAMPER QA TEST COMPANY	2144778925	Miles, Joe	5/10/2023 02:28:25	0	1	24670	Chef 2
2144778268	Individual		THE DAMPER HAMPER QA TEST COMPANY	2144778099	Dent, Arthur	5/10/2023 02:44:13	0	1	24364	CRW Test 0200-05-24 00

Sample Security Report – Individual Trace Report

WARN Reports

These reports display details of the layoff or closure associated with the WARN notice.

WARN Reports Menu

The following figure displays an example of the WARN Summary by Month Report.

Sample WARN Summary by Month Report

Financial Reports

Financial reports return information such as budget data, obligation data, and expenditure data. These reports also include Individual Fund Tracking (IFT) management information and fund stream information.

Access to the financial or fund management reports is normally only enabled for select staff members who are involved with managing the Advanced IFT components of Virtual OneStop. In

other words, the staff members who not only monitor and manage limitations on obligations, payments and refunds related to individual services for programs, but who also manage related budgets and budget or program limits, are usually given additional permissions to generate this set of reports.
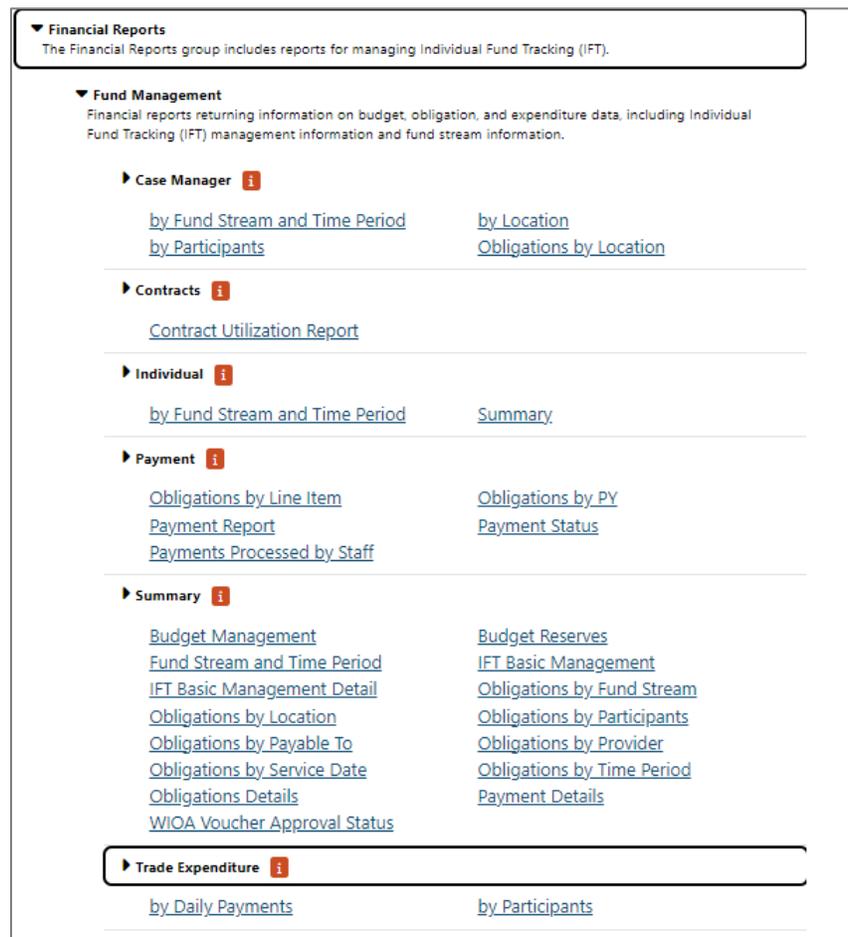
Financial Reports – Fund Management Reports Menu

Financial reports within fund management are divided into the following categories:

- **Case Manager** – These reports display information on the case managers whose clients are enrolled in fundable services.

- **Contracts –** These reports display information about program services provided under contract, to include service provider information.

- **Individual** – These reports display information on individuals enrolled in funded services and budget fund stream information.

- **Payment** – These reports display information on payment transactions.

- **Summary** – This category includes reports on IFT and Budget Management, Obligations and WIOA Voucher Approvals.

- **Trade Expenditure** – These reports provide information on participants involved in Trade program services.

The following figure displays a sample financial report.

Fund Management Reports - Budget Management
- Level Desired: State
- Program: Workforce Innovation and Opportunity Act (WIOA) Program
- Fund Stream Status: Active
- Time Period: 01/01/2000 - 12/31/2016

Fund Stream Name	Time Period	Budget Source	Program	Budget Amount	Total Enrollment Cost	Funded Costs	Budget Bal Available	% Budget Available	Obligations	Bal Avai to Obligate	Obligation Rate
LWDA 1 Dislocated Worker	LW01P131DSLWK14 (7/1/2013-6/30/2015)	LWDA 01	Workforce Innovation and Opportunity Act (WIOA) Program	$0.00		$0.00	$0.00	0.00 %	$0.00	$0.00	0.00 %
LWDA 1 Dislocated Worker	LW01F141DSLWK14 (10/1/2013-6/30/2015)	LWDA 01	Workforce Innovation and Opportunity Act (WIOA) Program	$0.00		$0.00	$0.00	0.00 %	$0.00	$0.00	0.00 %
LWDA 1 Dislocated Worker	LW01P141DSLWK15 (7/1/2014-6/30/2016)	LWDA 01	Workforce Innovation and Opportunity Act (WIOA) Program	$0.00		$0.00	$0.00	0.00 %	$0.00	$0.00	0.00 %
LWDA 1 Dislocated Worker	LW01F151DSLWK15 (10/1/2014-6/30/2016)	LWDA 01	Workforce Innovation and Opportunity Act (WIOA) Program	$645,702.00	$59,478.40	$62,656.98	$583,045.02	90.30 %	$50,038.23	$12,618.75	79.86 %
LWDA 1 Dislocated Worker	LW01F132DWRSP13 (9/15/2014-6/30/2015)	LWDA 01	Workforce Innovation and Opportunity Act (WIOA) Program	$158,878.00	$89,812.09	$68,214.09	$90,663.91	57.07 %	$64,127.24	$4,086.85	94.01 %

Sample Budget Management Report

Individual Reports

Individual reports provide statistical or account information about all individuals registered in the system or a selected group of

individuals. Reports can be filtered by several criteria, including age, desired salary, driver's license type and endorsement, education level and occupational experience.

Note: These reports are not related to whether the individuals are engaged in federal programs or using the system; they simply indicate individuals who have registered at one-stop locations.

▼ **Individual Reports**
The Individual Reports group provides data on registered or enrolled individuals, mainly from information provided by individuals to the system.

▶ **Assessment Results**
Reports displaying the most common assessment results for a particular area or region.

▶ **Background Information**
Information from data provided by registered individuals to the system through the Background Wizard, including drivers license type and endorsements, desired salary, education, and work experience.

▶ **Contact**
Reports listing contact information to assist staff members in contacting individuals.

▶ **Enrolled Individual**
View reports on enrolled individuals by various criteria, such as age, education and work status, with filters by program, subprogram, type, county, or veteran status, among others.

▶ **Registered Individual**
Report data from information entered into the system by individuals during registration.

▶ **Resume**
Reports detailing information on the resumes created by individuals in the system.

Individual Reports Menu

Assessment Results Reports

Assessment Results reports allow staff members to retrieve data showing the most common assessment results for a particular area or region.

Assessment Results Reports Menu

Assessment Results reports are broken down into the following categories:

- **Rating** – These reports display the results of the Work Interest Analyzer and the Work Values Assessment tool.

- **Results** – These reports allow staff members to retrieve data showing the most common assessment results for a particular area or region. If an area, for example, has several registrants that have a Chef and Head Cook background, one would tend to see skill sets related to this O*NET occupational title to be commonplace in the Assessment Results Reports. Likewise, if only a select few individuals have completed a skill set with specific skill sets related to nursing, and nursing is quickly becoming an In Demand occupation, those individuals that have a nursing background could be quickly retrieved.

- **Skills** – These reports display information on the individuals with O*NET job skills.

The following figure displays a sample Assessment Results report.

Skill	# Reported	%
note discrepancies in financial records	3	33.33%
prepare tax reports	3	33.33%
prepare financial reports	3	33.33%
maintain account records	3	33.33%
use spreadsheet software	3	33.33%
use accounting or bookkeeping software	3	33.33%
compile data for financial reports	3	33.33%
fill out business or government forms	2	22.22%
provide customer service	2	22.22%
reconcile or balance financial records	2	22.22%
Skill	# Reported	%

Total Rows: 10

Sample Job Skills Summary Report

Background Information Reports

Background Information reports provide information gathered in an individual's Background Wizard. The reports include information such as driver's license type and endorsement, desired salary, education, work experience, and desired work location.

▼ Background Information
Information from data provided by registered individuals to the system through the Background Wizard, including drivers license type and endorsements, desired salary, education, and work experience.

List   By Access to Motor Vehicles
By Actual Occupation Experience   By Desired Occupation
By Desired Salary   By Desired Work Location
By Drivers License Endorsements   By Drivers License Type
By Education Level   By Educational Category
By Individual Relies on Public Transportation   Days Since Last Employment

Background Reports Menu

The following figure displays a sample Background Information report.

Education Achievement Level	Total
10th Grade Completed	1
11th Grade Completed	1
12th Grade Completed & Did not receive diploma or equivalent	1
High School Equivalency Diploma	2
High School Diploma	34
1 Year at College or a Technical or Vocational School	2
2 Years at College or a Technical or Vocational School	1
3 Years at College or a Technical or Vocational School	1
No School Grades Completed	6
Vocational School Certificate	1
Associate's Degree	3
Bachelor's Degree	8
Master's Degree	3
Education Level not defined	11
Education Achievement Level	Total

Total Rows: 14

Background – By Education Acheivement Report

Contact Reports

These reports list contact information to assist staff members in contacting individuals. These reports can be filtered by the individual registration date or by the last date they accessed the system.

▼ **Contact**
Reports listing contact information to assist staff members in contacting individuals.

Analyst Registration   Individual Mini-Registration
Individual Registration   Profile and Resume Pictures
Scan Card with Age

Contact Reports Menu

The following figure displays a sample Contact report:

Report Date	State ID	First Name	Last Name	Primary Phone	Alt Phone	Email	Addr / City / State / Zip	County	In School	Educ Level	Working	Vet Eligible	Vet Status	O*NET	Preferred Communication Method
06/23/2023	11103	Jaimie	Duncan	(888) 555-1234			789 Any St Austin, TX 78702	Travis County		HS	No	No	No	53303100	
06/29/2023	11113	Marsha	Fox	(918) 251-1158			219 Parking Way Austin, TX 73301	Travis County		HS	No	No	No	29129200	
05/03/2023	10356	Interface	One	(888) 888-8888		interfacetest1@gmail.com	123 Main Street Austin, TX 73301	Travis County		HS	No	No	No	41201100	Internal Message
05/03/2023	10356	Interface	One	(888) 888-8888		interfacetest1@gmail.com	123 Main Street Austin, TX 73301	Travis County		HS	No	No	No	41201100	Internal Message
										HS	No	No	No	41201100	Internal Message

Sample Contact – Individual Registration Report

Enrolled Individual Reports

These reports provide information about some or all individuals who are enrolled in a specific program (i.e., WIOA or Wagner-Peyser). This report can be sorted by various criteria (e.g., by age, education, work status), and filtered by variables such as program, subprogram, type, county, veteran status, etc. Examples of typical reports staff may generate might include a breakdown by ZIP code for all individuals enrolled in WIOA who have a disability, or a breakdown by education level for all individuals enrolled in Wagner-Peyser who have been veterans for over 180 days.

▼ **Enrolled Individual**
View reports on enrolled individuals by various criteria, such as age, education and work status, with filters by program, subprogram, type, county, or veteran status, among others.

▶ **Enrolled** ℹ️

List | by Age
by Attending School Status | by Cookie Location
by County/Parish | by Desired Occupation
by Disability Status | by Educational Achievement
by Employment Status at Participation | by Gender
by Grant by Zip Code | by Hispanic Ethnicity
by Migrant/Seasonal Farm Worker Types | by NEG Grant
by One Stop Office | by Race
by Region/LWDB | by Registration Source
by Selective Service Registration | by Staff Assigned
by Unemployment Status | by Ward/Borough/Township
by Web Site Access Location | by WIOA 15 Percent Grant
by WIOA Partner Program | by Work Status
by Working in Agricultural ONET Occupation Code Status | by WP Special Program
by Zip Code |

▶ **Summary** ℹ️

Individuals Characteristics | Repeat Customer

▶ **Veteran** ℹ️

by Discharge Status | by Military Spouse/Dependent Status
by Potential Eligibility for Veteran Benefits | by Veteran Campaign Status
by Veteran Disability Status | by Veteran Eligible Person
by Veteran Significant Barrier to Employment (SBE) | by Veteran Status
by Veteran Transitional Service Member |

Enrolled Individual Reports Menu

These reports are broken down into the following categories:

- **Enrolled** – These reports combine information from an individual's registration form with basic case management fields. It is one of the primary reports that staff members can initially run when documenting case management program information on a group of individuals. Examples of typical reports staff may generate might include a breakdown by zip code for all individuals enrolled in WIOA who have a disability status, or a breakdown by education level for all individuals

enrolled in Wagner-Peyser who have been veterans for over 180 days.

- **Summary** – These reports provide an overview of individual characteristics such as demographic information and training allowances per fiscal year.

- **Veteran** – These reports combine information from an individual's registration form with basic case management fields. It is one of the primary reports that staff members can initially run when documenting case management program information on a group of individuals.

The following figure displays a sample enrolled individual report.

User Name	State ID	App ID	First Name	Last Name	Age at Partic.	Primary Phone	Email	Address
29228	10336	9849	Hannah	Tester	33	(727) 510-8908	noemail@geosolinc.com	123 Tester Way
User Name	State ID	App ID	First Name	Last Name	Age at Partic.	Primary Phone	Email	Address

Total Enrolled Individuals: 1

Sample Enrolled Individuals – List Report

Registered Individual Reports

Registered Individual reports display information from individuals' registration, such as age, race, gender, education, employment status, etc.

▼ **Registered Individual**
Report data from information entered into the system by individuals during registration.

▶ **Characteristics** [i]

Participant Profile

▶ **Registered** [i]

List	by Age
by Attending School Status	by Cookie Location
by County/Parish	by Disability Status
by Education Achievement	by Employment Status
by Gender	by Heard About WebSite
by Hispanic Ethnicity	by IP Location
by Migrant Farmer Worker Types	by Military Spouse/Dependent Status
by No Virtual Recruiter	by Office
by ONET Occupation Group	by Preferred Language
by Race	by Region/LWDB
by Registration Source	by UI Update Date
by Unemployment Status	by VR Services
by Ward/Borough/Township	by Website Access Location
by Works in Agricultural ONET Occupation	by Zip Code
Disability	Limited English Proficiency

▶ **Veteran** [i]

by Disabled Veteran Status	by Potential Eligibility for Veteran Benefits
by Transitioning Service Members	by Veteran Discharge Status
by Veteran Eligible Person	by Veteran Status

Registered Individual Reports Menu

These reports are broken down into the following categories:

- **Characteristics** – These reports provide numerous attributes of an individual's registration data.

- **Registered** – These reports take all the fields from individual registration and allow staff members to run reports on them.

- **Veteran** – These reports take all the fields from individual registration and allow staff members to run reports on them.

The following figure displays a sample Registered Individual report.

Education Achievement Levels	Total	% Total
No School Grades Completed	30	0.29%
1st Grade Completed	4	0.04%
2nd Grade Completed	7	0.07%
3rd Grade Completed	14	0.13%
4th Grade Completed	10	0.10%
5th Grade Completed	13	0.12%
6th Grade Completed	56	0.54%
7th Grade Completed	21	0.20%
8th Grade Completed	83	0.79%
9th Grade Completed	122	1.17%
10th Grade Completed	158	1.51%
11th Grade Completed		
12th Grade Completed & Did not receive diploma or equivalent		
High School Equivalency Diploma		
High School Diploma		
1 Year of College or a Technical or Vocational School		
2 Years of College or a Technical or Vocational School		
3 Years of College or a Technical or Vocational School		
Vocational School Certificate		
Associate's Degree		
Bachelor's Degree		
Master's Degree		
Doctorate Degree		
Specialized Degree (e.g. MD, DDS)		
NA		
Total Rows: 25		

Records per page: 50

Excel   CSV   Pipe Delimited   Graph   Print

List of all Registered Individuals by Educational Achievement Where Registration Date is between 03/20/2010 and 03/26/2010.

Sample Registered Individuals Report by Education Achievement Report

Résumé Reports

Résumé reports list individuals who have Résumés in the system and track the results of those Résumés. These reports indicate which resumes are generating responses and which individuals may need additional help with their resumes. The Résumé reports offer a variety of sorting and filtering choices.

Resume Reports Menu

These reports are broken down into the following categories:

- **Resume** – These reports document information concerning individuals and the résumés they create in the system.

- **Worker** – These reports document information concerning individuals' education, years of work experience, and occupations listed.

The following figure displays a sample Resume report.

User ID	State Id	First Name	Last Name	City	Date Created	Résumés Title	Desired Occupation	Résumés Online	Review Staff	Date Reviewed
15386	3127	Ashley	Adams	Austin	06/19/2023	Driver	Civil Engineers	Yes	NA	N/A
29283	10370	Katniss	Bluebonnett-GSI	Galveston	05/23/2023	Teacher	Medical Secretaries and Administrative Assistants	No	NA	N/A
29254	10355	Test	Jones	Winter Garden	03/10/2023	test	Health Informatics Specialists	Yes	NA	N/A
29220	10328	Jeff	Smith	Winter Garden	01/04/2023	test	Bioinformatics Technicians	Yes	NA	N/A
29232	10340	Shesa	Tester	San Antonio	03/23/2023	Shesa Accountant Resume	Paramedics	No	NA	N/A
29232	10340	Shesa	Tester	San Antonio	03/23/2023	Shesa Accountant Resume	Accountants and Auditors	Yes	NA	N/A
User ID	State Id	First Name	Last Name	City	Date Created	Résumés Title	Desired Occupation	Résumés Online	Review Staff	Date Reviewed

Total Rows: 20

Sample Résumé List Report

Services Reports

The Services reports include the following:

- **Services Provided Employer –** These reports display information about the services staff provide to employers.

- **Services Provided Individual –** These reports display information about the staff-provided services delivered to individuals by program.

▼ **Services Reports**
View reports providing data on staff-provided services to either individuals or employers.

   ▼ **Services Provided Employer**
   View reports displaying information on the services provided by staff to employers.

List	by Current & Past Year Comparison
by Employer	by Office
by Region/LWDB	by Service
by Service Status	by Staff
by Staff and Services	

   ▼ **Services Provided Individual**
   View reports displaying information, by program, on the services provided by staff to individuals.

     ▶ Service ℹ️

List	by Access Location
by Activity Completion Status	by Age
by County	by Disability Status
by Disabled Veteran Status	by Discharge Status
by Education Level	by Enrollment Characteristics
by Ethnicity	by Gender
by Grant	by Individual
by MSFW Status	by Office
by Potential Eligibility for Veteran Benefits	by Provider
by Race	by Region/LWDB
by Selective Service	by Service Assistance Type
by Services	by Services with Rapid Response Event
by Staff Assigned	by Staff Edit
by Staff Reported	by Veteran Campaign Status
by Veteran SBE	by Veteran Status
by Work Status	by Zip Code

Services Reports Menu

Services Provided Employer

These reports display information about the services staff provide to employers. The number of filters for employer services are more limited than the reports for individual services since the service possibilities for employers are more limited.

The system includes the following Services Provided Employer reports:

- **List** – This report provides a list of all preferred employers and the services that were provided to them, the staff member, service dates, and comments. The Employer Username is NOT a link to the employer's profile folders.

- **By Employer** – This report lists preferred employers and the number of services provided to them by staff. Click the **Employer** link to open the Services Provided Employer List**.**

- **By Region/LWDB** – This report provides a list of all services provided employers by Region/LWDB.

- **By Service Status** – This report lists service statuses (e.g., Successful Completion) and the number of employers and number of services provided with that status. Click the **Service Status** link to open **the** Services Provided Employer – List report.

- **By Staff and Services** – This report lists all services provided employers by Staff & Services.

- **By Current and Past Year Comparison** – This report lists a comparison of services, by employer per year, for general services, resume search job order, and for each year that

services occurred, staff can click to see details report on the specific services breakdown (clicking on the Yes indicator in the Year column).

- **By Office** – This report lists one-stop offices and the number of employers they served and the number of services they performed for preferred employers. Click the **<u>Office</u>** link to open a detailed report of the employers who received services through the selected one-stop office.

- **By Service** – This report lists services provided employer reports, by service.

- **By Staff** – This report lists staff members and the number of employers they served and the number of services they performed for preferred employers. Click the **<u>Staff Reported</u>** link to open a detailed report of the employers who received services through the selected staff person.

▼ **Services Provided Employer**
View reports displaying information on the services provided by staff to employers.

List	by Current & Past Year Comparison
by Employer	by Office
by Region/LWDB	by Service
by Service Status	by Staff
by Staff and Services	

Services Provided Employer Reports Menu

The following figure displays an example of the Services Provided Employer – by Service report.

Services Provided Employer Reports - by Service
- Region/LWIA: CareerSource Escarosa
- Actual Date: 11/27/2015 - 12/03/2015

Service	Total Employers	Total Services
E09 - Delivered Applications/Resumes	1	2
E30 - Entered into Recruiting Agreement	1	1
E34 - Job Order	6	7
E35 - Job Referrals and Placement	1	1
E03 - Provided Job Order Follow-up	27	41
E04 - Provided Mass Recruitment Services	1	1
E90 - Referred Qualified Applicants	17	31
Service	Total Employers	Total Services
Total Rows: 7	54	84

Services Provided Employer – by Service Report

Services Provided Individuals

These reports display information about the staff-provided services delivered to individuals by program. The reports can be sorted by various criteria, e.g., age, county, staff member assigned, etc. and filtered by parameters such as program, registration date range or last one-stop access date, etc.

The Services Provided to Individuals reports include those shown in the following figure.

Service

List	by Access Location
by Activity Completion Status	by Age
by County	by Disability Status
by Disabled Veteran Status	by Discharge Status
by Education Level	by Enrollment Characteristics
by Ethnicity	by Gender
by Grant	by Individual
by MSFW Status	by Office
by Potential Eligibility for Veteran Benefits	by Provider
by Race	by Region/LWDB
by Selective Service	by Service Assistance Type
by Services	by Services with Rapid Response Event
by Staff Assigned	by Staff Edit
by Staff Reported	by Veteran Campaign Status
by Veteran SBE	by Veteran Status
by Work Status	by Zip Code

Services Provided Individual Reports Menu

A sample report is shown below. Clicking the *User ID* link opens the individual's Profile screen.

User Id	Office	First Name	Last Name	City, State Country	Service	Staff Created	Staff Edited	Create Date
2763	Region 1 Career Center - South County	Matt	Smithe	Dunedin, FL US	200 - Individual Counseling	Staff, Cathy	Staff, GSI	7/19/2013 11:03:00 AM
2766	Region 1 Career Center - Mid County	Renee	GSI-Hall	Saint Petersburg, FL US	101 - Orientation	McGovern, Lois	Staff, GSI	7/5/2013 2:02:00 PM
2766	Region 1 Career Center - Mid County	Renee	GSI-Hall	Saint Petersburg, FL US	300 - Occupational Skills Training - Approved Provider List (ITA)	McGovern, Lois	Staff, GSI	7/5/2013 2:27:00 PM
2766	Region 1 Career Center - South County	Renee	GSI-Hall	Saint Petersburg, FL US	412 - Objective Assessment	Staff, GSI	Staff, GSI	2/13/2014 2:10:00 PM
2780	Region 1 Career Center - South County	Jack	Sparrow	Saint Petersburg, FL US	102 - Initial Assessment	Staff, GSI	Staff, GSI	1/22/2014 10:02:00 AM
Total Rows: 38								

Sample Services Provided to Individuals Report – List

These reports have extensive lists of filtering options. The reports can be filtered by program, staff, activity, as well as many options that are specific to the individuals. These filters include such items as age, race, education, and unemployment, selective service, or disability status.

Staff Efficiency & Tracking Reports

The reports in this category address features, functions, and system modules that improve staff efficiency and reduce staff effort as they use the system to manage the needs of their clients.

The following figure displays a sample Staff Efficiency and Tracking Reports menu.

▼ **Staff Efficiency and Tracking Reports**
Track services associated with events, system measures, messaging, and survey results.

▶ **Event Scheduler**
Track services associated with events created through the Events calendar, associate service codes with events, and track individuals registered for events.

▶ **Help Desk**
Reports tracking the Live Chat feature, including chat requests, details by user, and live chats by AOR/FAQ.

▶ **Messages**
View reports for invalid email addresses and messages sent by Case Manager, Region/LWIA, and Subject Match.

▶ **Mobile App**
View reports on mobile app usage that display statistical data for first-time users, devices used, search data and more.

▶ **Survey**
View a report summary of answers to customer satisfaction surveys submitted by system users.

▶ **Tracking**
Tracking reports displaying information for system measures informing staff of the most-used areas of the system, or the total number of times users logged into the system.

▶ **VOS Greeter®**
Reports for the VOS Greeter® module displaying data for office visitor check-ins.

Staff Efficiency and Training Reports Menu

Event Scheduler

The Event Scheduler reports track services associated with events created through the Events calendar. The Attendance Tracking feature can assist staff members to associate service codes with events and track individuals who sign up for the events.

- **List of Events – Detailed** – This report displays a list of events, based on the selected criteria, along with the event date(s), type, category, Region/LWDA, etc.

- **Event Capacity Summary** – This report displays a list of the capacity for each event.

- **Registered Event Type Summary** – This report lists events and the number of registrants and attendees, as well as the number who cancelled or rescheduled or were no-shows.

- **Detailed Attendance Tracking** – This report lists the individuals associated with events (registered, attended, canceled, etc.) as well as basic event information.

- **Registered Event Summary** – This report displays a list of events, with the event date, and the number of participants who registered and attended. On the report, click the link in the Event column to open a detailed report that displays the individuals who attended the event and their registration date.

▼ **Event Scheduler**
Track services associated with events created through the Events calendar, associate service codes with events, and track individuals registered for events.

List of Events - Detailed	Detailed Attendance Tracking
Event Capacity Summary	Registered Event Summary
Registered Event Type Summary	

Event Scheduler Reports

The following figure displays an example of the Registered Event Summary Report.

Event ID	Event Name	Start Date	Start Time	End Date	End Time	Class Size Ind	Class Size Emp	Inactive	Event Type	Event Category
1043	20000K	08/01/2019	1 :00PM		5 :00PM	999	0	N	Recurring - Bi-Weekly	Job Fair
1862	848266 event	06/23/2023	4 :00PM	06/23/2023	5 :00PM	5	0	Y	One Time	Meetings
845	Adult Orientation WIOA	07/24/2019	8 :00AM		11:00AM	5	0	N	Recurring - Weekly	Orientation
683	Amanda Job Fair	07/18/2019	10:00AM		12:00PM	0	0	N	Recurring - Monthly	Job Fair
1442	Aramark Hiring Event	08/19/2019	8 :00AM		5 :00PM	4	0	N	Recurring - Once Monthly	Job Fair
917	Are YOU Ready? Workshop	07/30/2019	2 :00PM		4 :00PM	0	0	N	Recurring - Monthly	Workshop/Training
939	Are YOU Ready? Workshop	07/30/2019	2 :00PM		4 :00PM	0	0	N	Recurring - Monthly	Workshop/Training
237	BSU Meeting	07/15/2019	2 :00PM		5 :00PM	0	0	N	Recurring - Monthly	Meetings
614	Celebration	07/17/2019	2 :30PM		5 :00PM	50	0	N	Recurring - Once Monthly	Other Events
441	Center Service				2 :30PM	15	0	N	Recurring - Weekly	Orientation
							0	N	Recurring - Weekly	Orientation

Sample Event Scheduler – Registered Event Summary Report

Help Desk

Provides reports tracking the Live Chat feature, including chat requests, details by user, and live chats by AOR/FAQ.

▼ **Help Desk**
Reports tracking the Live Chat feature, including chat requests, details by user, and live chats by AOR/FAQ.

Chat Details by User   Chat History by Staff
Live Chats by AOR/FAQ   Number of Incoming Chat Requests
Number of Incoming Requests by AOR

Help Desk Menu

Messages

The Message report displays messages sent during the selected date range. The report can be filtered by Case Manager, Region/LWDA, and Subject Match (exact or contains).

▼ **Messages**

View reports for invalid email addresses and messages sent by Case Manager, Region/LWIA, and Subject Match.

Invalid Email Addresses   Messages Sent Report

Messages Menu

The following is a sample Messages report.

From User	Subject	Sent Date	Messages Sent
2646	staff no restrictions	08/09/2013	4
2646	provider no restrictions	08/07/2013	3
2646	testing no restrictions	08/07/2013	3
2646	message 2 lwia only	07/31/2013	3
2646	message with full privs	07/31/2013	3
2776	Planning Meeting for Correspondence Workshops	03/13/2014	3
2776	Possible candidates	11/22/2013	2

Messages Sent Report

Sample Messages Report

Mobile App

View reports on mobile app usage that display statistical data for first-time users, devices used, search data and more.

Mobile App
View reports on mobile app usage that display statistical data for first-time users, devices used, search data and more.

App First Time Users   By Device Type
By Sessions Duration   Mobile App Job Searches
Mobile App Sessions   Mobile App Statistics
Mobile App Users by City   User Demographics Compare

Mobile App Menu

Survey

The Survey report displays the answers to customer satisfaction surveys submitted by system users. The report can be filtered by Login Type (Analyst, Individual, Employer, or Guest), User Type (Youth, Job Seeker, Employer, etc.), Region/LWDA, and date range.

Which type of user best describes you?		
Answer	**Number of Times Answered**	**Percent of Times Answered**
Youth (18 years old or less)	1	2.3%
Jobseeker	38	88.4%
Employer	1	2.3%
Labor Market Analyst/Researcher	1	2.3%
Other	2	4.7%
		Total: 43

Indicate the primary purpose for which you will be using this information		
Answer	**Number of Times Answered**	**Percent of Times Answered**
Job Search	34	79.1%
Career planning/Occupational Research	1	2.3%
Research/Reports	1	2.3%
Just looking around	4	9.3%
Employer looking for candidates	1	2.3%
Other	2	4.7%
		Total: 43

Sample Survey Customer Feedback Report

Tracking

Tracking reports track information important for system performance measures. The reports can inform staff of the parts of the system being used the most. For example, the reports may show the total number of times that users logged into the system and accessed educational services.

- **By Service** – This report lists the total number of users who logged into the system during the selected date range and the number of users who visited specific locations within Virtual OneStop during that time.

- **By Location –** This report lists the method used to access the site (i.e., internet) during the selected date range. Staff can click the link to open a detailed report of the user types that accessed the site during that time.

- **By LWDB –** This report lists all tracking information by LWDB/Region.

by Location   by LWDB
by Service

Tracking Reports Menu

The following figure displays an example of the Tracking by Service Report.

Tracking - by Service
Date Range: 3/10/2024 - 4/8/2024
Report Run Time: 4/8/2024 2:55:08 PM

Service Description	Total
Login Totals	4,043
Education Services	3
Employer Services	44
Labor Services	76
Veteran Services	5
Service Description	Total
Total Rows: 5	4,171

Sample Tracking by Service Report

VOS Greeter

The reports available in this sub-category rely upon the VOS Greeter module, as they display data for office visitor check-ins.

The following figure displays the VOS Greeter Reports menu:

▼ **VOS Greeter®**
Reports for the VOS Greeter® module displaying data for office visitor check-ins.

List	by Hour
by Office	by Staff Assisted
by Visit Reason	by Weekday
Edited Visit Reasons	EEO
Office SnapShot	Staff Operating Times
State Reason Code Usage by Region/Office	Weekly Summary

VOS Greeter Reports Menu

The following figure displays a sample VOS Greeter List report.

Checkin Date	Checkin Time	Day of Week	Individual	User ID	State ID	Phone Number	E-mail	LWDB	Office	
02/10/2022	3:29 PM	Thursday		27913	9425	(214) 395-1133	amari12@yahoo.com	Dallas WF Board	949 WF SOL Dallas Irving	Employmer
02/10/2022	2:38 PM	Thursday		27896	9410	(214) 395-1133	bossamir_@yahoo.com	Dallas WF Board	949 WF SOL Dallas Irving	RESEA Ori
02/10/2022	2:38 PM	Thursday		27896	9410	(214) 395-1133	bossamir_@yahoo.com	Dallas WF Board	949 WF SOL Dallas Irving	Employmer
06/09/2020	3:41 PM	Tuesday		19847	5020	(800) 999-0000	Red7@yohoo.com	Capital Area WF Board	129 WF SOL Capital Area North	01. It's m
06/09/2020	3:47 PM	Tuesday		19847	5020	(800) 999-0000	Red7@yohoo.com	Capital Area WF Board	123 WF SOL Capital Area East	02. I r
06/10/2020	1:56 PM	Wednesday		19847	5020	(800) 999-0000	Red7@yohoo.com	Capital Area WF Board	123 WF SOL Capital Area East	Asse
02/09/2022	2:06 PM	Wednesday		27873	9387	(214) 914-8612	sunshineanderson@gmail.com	Dallas WF Board	949 WF SOL Dallas Irving	RESE
02/09/2022						(214) 914-8612	sunshineanderson@gmail.com	Dallas WF Board	949 WF SOL Dallas Irving	Employm

Sample VOS Greeter List Report

Custom Reports Category

The Custom Reports menu option offers staff access to customized, ad hoc reports that were created by other state customers. Although staff members cannot modify Custom Reports, they can select desired geographic filters that are TX-specific, as well as date filters.

The Custom Reports include the following:

- **Locally Developed** – These reports cover a wide range of topics. Some are case management related, some are statistical, and some document some aspect of labor exchange.

- **RESEA** – These reports display RESEA related reports.

- **State Performance** – These reports display information on state performance in various programs, as well as information on the employment rate and job openings.

Custom Reports

Locally Developed

This list of custom reports includes those developed by various states. The reports are described below and are listed by the state of origination.

Locally Developed Custom Reports Menu

This section describes the reports available from each participating state.

> **Note:** The order in which these locally developed reports display may vary.

Wyoming

- **Provider Programs - No. of Participants** – This report lists the number of participants in a specific provider program.

District of Columbia

- **Case Management** – This is an extensive report that lists several columns of information regarding individual enrollments in federal programs.

- **Exiters** – This report lists WIOA program exiters and basic information pertaining to their WIOA exit experience.

- **Rapid Response** – This report lists information pertaining to participants in Rapid Response events.

- **Generic Youth Active** – This report provides information on youth enrolled in generic programs.

- **WIOA Follow-up** – This report provides extensive information regarding WIOA participants and their follow-up information after exiting the program.

- **Profiling** – This report provides profiling information on WIOA participants.

- **UI Claimants in Training** – This report lists information regarding Unemployment Insurance recipients who are enrolled in a training course through a federal program, such as WIOA.

- **Exited WIOA Youth** – This report provides information on WIOA youth who have exited from the system.

- **WIOA and Generic Active Youth** – This report documents youth enrolled in WIOA and/or local generic programs.

- **Training** – This report lists the number of participants in various categories of training services.

- **TEP** – This report documents individuals enrolled in the TEP program.

- **Occupation** – This report lists information on individuals enrolled in WIOA by O*NET occupation, with the ability to filter with up to 5 different O*NET occupation codes.

Florida

- **In School at Participation** – This report lists the number of participants who are in-school youth at the time of participation. The links in the *Total* column open a detailed view of the report where staff can review participant information, such as LWDA, Username, Last Name, First Name, SSN, Customer Group, and School Status. In Detailed View, click the Username link to open the individual's Profile screen.

- **Out of School at Participation** – This report lists the number of participants who are out-of-school youth at the time of participation. The links in the *Total* column open a detailed

view of the report where staff can review participant information, such as LWDA, Username, Last Name, First Name, SSN, Customer Group, and School Status. In Detailed View, click the **Username** link to open the individual's Profile screen.

- **Customer Counts by Customer Group** – This report lists the total number of WIOA participants by customer group (i.e., Adult, Younger Youth, and Older Youth). The links in the *Customer Group* column open a detailed view of the report where staff can review participant information, such as LWDA, Username, Last Name, First Name, and partial SSN. In Detailed View, click the **Username** link to open the individual's Profile screen.

Maryland

- **Native Language Users Monthly** – This report lists the number of non-English-speaking users by specific language types (Polish, Apache, etc.) on a monthly basis.

- **Services** – This extensive report displays participants in the selected program. The report data includes the office, assigned staff, the individual's age, gender, race, reading and math levels, and exit date and reason, as well as much more.

- **Placement** – This extensive report displays placement information for individuals and is otherwise similar to the **Services** report described above.

- **Active Participants** – This extensive report displays information on active program participants and is otherwise

similar to the **Services** and **Placement** reports described above.

California

- **Enrollment Roster** – This extensive report lists information on participants in the WIOA program. Click the **<u>Username</u>** link to open the individual's Profile screen.

- **Exits** – This report lists individuals who have exited from the program, including their school status, basic skills deficiencies, and exit reasons. Click the **<u>Username</u>** link to open the individual's Profile screen.

- **Demographics** – This extensive report lists demographic information (race, gender, etc.) regarding federal program participants.

- **Training** – This extensive report lists training information about participants enrolled in various training programs. Click the <u>Username</u> link to open the individual's Profile screen.

- **Case Management** – This report shows WIOA cases by office location, by case manager, and then by program. The report also includes Training Data Summary and Detail information.

- **Youth Numeracy Literacy** – This report provides information on youth literacy-numeracy results in WIOA.

- **New Registrations** – This report provides information on new registrants in the system.

- **Ex-Offender Enrollments** – This report lists information on participants identified as ex-offenders.

- **OJT/Work Experience** – This report lists information on participants identified as being active in On-the-Job Training or Work Experience Contracts.

Louisiana

- **Premier Customer** – This report provides information on preferred employers who are identified as **premier customers,** receiving extensive customer service from workforce business services teams.

- **Job Order Applicants** – This report lists individuals who applied to job orders in the system.

Indiana

- **Registered Individuals - JAG** – This report provides information on college-age registered individuals and their education status as part of Jobs for America's Graduates.

New Mexico

- **Placement** – This report lists individuals who have been placed with jobs by preferred employers in the system.

- **Demographics** – This extensive report lists individuals with such information as city, race, age, gender, language, and veteran, education, employment, and UI status.

Rhode Island

- **Training** – This report lists the number of participants in various categories of training services.

The following figure displays an example of the Enrollment Roster report.

UserName	First Nar	Exit Date	me	Zip Code	App. Number	JTA App. Number	Agency Code	Agency Name	Case Number	Case Manager	One Stop	ARRA Summer	CA. Grant Code	VOS Customer Group	In/Out School	Participation Date	Date Enrolled in Grant	Close Date	Exit Date
GSISJYTH081027	William	NA		93940	117	2300007	021	MO CO ONE-STOP SEASIDE	2300015	NA	NA	NA	301	Younger Youth	InSch	10/27/2008	10/27/2008	10/27/2008	NA
GSISJYTH081027	William	NA		93940	117	2300007	560	SILVER STAR YOUTH RESOURCE CNT	2300015	NA	NA	NA	301	Younger Youth	InSch	10/27/2008	10/27/2008	10/27/2008	NA
GSIVETGRANT	GSI	NA	N	93906	77	2301057	021	MO CO ONE-STOP SEASIDE	1000026	NA	NA	NA	201	Adult	OutSch	3/20/2008	3/20/2008	NA	NA
GSIBMYOUGOALS	Bm	9/12/2008	als	93940	106	2301084	015	MO CO ONE-STOP SALINAS	2301049	NA	NA	NA	301	Younger Youth	InSch	5/8/2008	5/8/2008	9/12/2008	9/12/2008
GSIBMYOUGOALS	Bm	9/12/2008	als	93940	106	2301084	502	ARBOR, INC.	2301049	NA	NA	NA	301	Younger Youth	InSch	5/8/2008	5/8/2008	9/12/2008	9/12/2008
UserName	First Nar	Exit Date	me	Zip Code	App. Number	JTA App. Number	Agency Code	Agency Name	Case Number	Case Manager	One Stop	ARRA Summer	CA. Grant Code	VOS Customer Group	In/Out School	Participation Date	Date Enrolled in Grant	Close Date	Exit Date
Total Rows: 35																			

Sample Enrollment Roster Report

RESEA

This custom reporting option displays reports used to manage the Reemployment Services and Eligibility Assessment (RESEA) program, which is a grant program for states to assist individuals receiving unemployment insurance (UI) benefits. The reports include the numbers of participants scheduled for participation, as well as those who were assessed, excused, exited, and disqualified from the programs.

The following figure displays the RESEA Custom Reports menu.

RESEA Custom Reports Menu

When staff select a state name, the system displays those custom report titles developed by other state agencies, as described below. Like Locally Developed reports, the query itself cannot be changed by TWC staff, but they can choose geography and data filters.

Report titles within this category under individual states include the following:

- **Profile Ranking under Maryland** – This report lists participants who are eligible under Maryland's Early Intervention program, and it includes basic profile ranking information for supportive eligibility. Click the **Username** link to open the individual's Profile screen.

- **Initially Scheduled/ Not Resulted under Florida** – This report lists participants in the RESEA program and the scheduled date and time for their respective program participation. Click the **Username** link to open the individual's Profile screen.

- **Total Assessed under Florida** – This report lists the total number of RESEA participants who are assessed.

- **Yellow Flag under Florida** – This report lists RESEA participants and crucial information on attendance for RESEA events that are approaching, or just passed, and if they have a yellow flag monitoring status by staff. Click the **Username** link to open the individual's Profile screen.

- **Scheduled PREP Exempted under Florida** – This report lists participants in RESEA with Scheduled Meeting Exemptions and what specifically the Exemption is. Click the **Username** link to open the individual's Profile screen.

- **Total Excused under Florida** – This report lists individuals who are excused from the initial orientation in the programs.

- **No Show under Florida** – This report lists participants who did not show up for RESEA orientation sessions. Click the **Username** link to open the individual's Profile screen.

- **Total Scheduled under Florida** – This report lists participants who are scheduled for RESEA events. Click the **Username** link to open the individual's Profile screen.

- **Red Flag under Florida** – This report lists RESEA participants and crucial information on attendance dates for RESEA events that have passed, and which have a Red Flag Status to be monitored by staff. Click the **Username** link to open the individual's Profile screen.

- **Total Disqualified under Florida** – This report lists the total number of individuals who are disqualified from the programs.

- **Total Rescheduled under Florida** – This report lists the total number of RESEA participants who have been rescheduled for another orientation session.

The following figure displays a sample UI Duration Summary Report (from Nevada).

Groups	Individuals Count	Weekly Payments Count	Average Payment Count
Non-Participant Comparison Group - Not Eligible for RSM	0	0	0.00

Estimated Trust Fund Savings Measurements	Non-Participant Comparison Groupâ€" Not Eligible for RSM	Non-Participant Comparison Group â€" Eligible for RSM	Total Non-Participants
Non-Participant Average Weeks of UI Payments	0.00	0.00	0.00
Participant Average Weeks of UI Payments	0.00	0.00	0.00
Average Weeks of UI Saved	0.00	0.00	0.00
Average Weekly Benefit Payment Amount	$0.00	$0.00	$0.00
Average Weekly Benefit Payment Savings	$0.00	$0.00	$0.00
Total Program Participants	0	0	0
Estimated Trust Fund Savings By Program	$0.00	$0.00	$0.00

Sample UI Duration Summary Report

State Performance

The State of Florida created multiple custom reports that track unique variations of the WIOA performance measures. The following figure displays the Florida State Performance Reports menu.

▼ State Performance

   ▼ Florida

      Employment Rate for those Receiving Training   Regional MSFW
      WIOA Adult Employed Worker Outcome Rate   WIOA Adult Entered Employment Rate
      WIOA DW Entered Employment Rate   WIOA In School Youth Outcome Rate
      WIOA Out of School Youth Outcome Rate   WIOA Timeliness of Data Input For Exits
      WIOA Timeliness of Data Input For Participations   WIOA Youth Skill Attainment Rate
      WIOA YY Exiters With Positive Outcomes

Florida State Performance Reports Menu

Following are descriptions of reports available within this custom report sub-category.

- **Employment Rate for Those Receiving Training** – This report shows the employment rate of participants involved in training activities. In the Primary View, the Numerator and Denominator are links to a detailed view of the report; in the Detailed View, the Username is a link to the individual's Profile screen.

- **WIOA DW Entered Employment Rate** – This report provides a list of participants in the WIOA program, Dislocated Worker Customer Group, and their entered employment rates. In the Primary View, the Numerator and Denominator are links to a detailed view of the report; in the Detailed View, the Username is a link to the individual's Profile screen.

- **WIOA In School Youth Outcome Rate** – This report provides a list of participants in the WIOA In School Youth program and their Outcome Rate. In the Primary View, the Numerator and Denominator are links to a detailed view of the report; in the Detailed View, the Username is a link to the individual's Profile screen.

- **WIOA Youth Skill Attainment Rate** – This report provides a list of WIOA youth participants by numerator and denominator. In the Primary View, the Numerator and Denominator are links to a detailed view of the report; in the Detailed View, the Username is a link to the individual's Profile screen.

- **WIOA Timeliness of Data Input for Participations** – This report examines how effective regions are at entering participation data for WIOA participants in a timely manner. In the Primary View, the Participant links open a detailed view of the report that includes the Application ID, Username, First and

Last Name, Participation Date, Creation Date, and Elapsed Days. In the Detailed view, the Username is a link to the individual's Profile screen.

- **Regional MSFW** – This report provides a list of Migrant Seasonal Farm Workers based on location and time period. Click the **Username** link to open the individual's Profile screen.

- **WIOA Adult Entered Employment Rate** – This report provides a list of participants in the WIOA program and their entered employment rates. In the Primary View, the Numerator and Denominator are links to a detailed view of the report; in the Detailed View, the Username is a link to the individual's Profile screen.

- **WIOA Adult Employed Worker Outcome Rate** – This report provides a list of adult participants in the WIOA program and their entered employment rates. In the Primary View, the Numerator and Denominator are links to a detailed view of the report; in the Detailed View, the Username is a link to the individual's Profile screen.

- **WIOA Out of School Youth Outcome Rate** – This provides a list of out of school youth participants in the WIOA program and is similar to the WIOA In School Youth Outcome Rate report.

- **WIOA YY Exiters with Positive Outcomes** – This report provides a list of participants in the WIOA program, Younger Youth, and their Positive Outcome information. The Username is a link to their profile folders.

- **WIOA Timeliness of Data Input for Exits** – This report examines how effective regions are at entering exit data for WIOA participants in a timely manner. Click the **<u>Username</u>** link to open the individual's Profile screen.

- **Daily Job Openings** – This report gives a list of active job openings by region. Information is only retained for 24 hours before it is replaced by new job openings data. The report organizes jobs data by internal job orders, internal openings, external job openings, and total job openings. Each column contains links to specific job orders.

The following figure displays and example of the WIOA Youth Skill Attainment Rate Report.

Custom Reports - WIA Youth Skill Attainment Rate			
LWIA	**Numerator**	**Denominator**	**Rate**
01	1	2	50.00%
Total Rows: 1	**1**	**2**	**50.00%**

Sample WIOA Youth Skill Attainment Rate Report

Federal Reports Category

The Federal Reports category enables authorized staff to generate and review the information provided in the Employment and Training Administration (ETA)-required reports related to the federal programs and services configured for the WIT system.

The following figure displays the Federal Reports menu.

Federal Reports Menu

Note: TWC produces federal reports according to the PIRL schema using its enterprise data warehouse and will not rely on the WIT system to generate these reports. Therefore, this training lesson will provide a high-level overview of the Federal Reports available in the WIT system.

Equal Employment Opportunities

The WIT system can generate Equal Employment Opportunity (EEO) reports to assist employers who are required to report EEO data related to their recruiting efforts. Staff can also provide these

reports to registered employers upon request. In addition, qualified registered employers can generate a report that can be used to validate the employer's compliance with Office of Federal Contract Compliance Programs (OFCCP) requirements for federal contractors. The report breaks down applicants by race, ethnicity, age, disability status, etc.

▼ **Equal Employment Opportunities**
Display Federal Equal Employment Opportunities Reports.

Service Types - Adult and Dislocated Worker   Program Participations - Adult and Dislocated Worker
Wagner Peyser - Age and Disability Status   Wagner Peyser - Ethnicity and Race
WIOA Youth Program - Detailed   WIOA Youth Program - Summary
WP Participant Services by Race, Ethnicity and Gender

Equal Employment Opportunities Reports Menu

	Total	Hispanic or Latino		White		African American/Black		American Indian/Alaskan Native		Asian		Hawaiian/Other Pacific Islander		More than 1 Race	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F
⊞ Eligible	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
% to Total		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
⊞ Participants (Registrants)	4	0	2	0	1	1	0	0	0	0	0	0	0	0	2
% to Total		0.0%	50.0%	0.0%	25.0%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%
⊞ Exiters	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
% to Total		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	M	F	M	F	M	F	M	F	M	F	M	F	M	F
		Hispanic or Latino		White		African American/Black		American Indian/Alaskan Native		Asian		Hawaiian/Other Pacific Islander		More than 1 Race	

Total Rows: 21

Sample Equal Employment Opportunities - Program Participations - Adult and Dislocated Worker Report

Foreign Labor Certification

Employers seeking Foreign Labor Certification (FLC) under H-2A or H-2B can enter these jobs directly into the WIT system. As individuals are referred to the jobs, WIT tracks these referrals. At the end of the quarter, authorized staff can run the ETA-9127 report to review the numbers.

▼ Foreign Labor Certification
Display Foreign Labor Certification Reports

ETA 9127

Foreign Labor Certification Report Menu

	H-2B Workload	H-2B Regular	H-2B Special Procedures
1	Total number of active Job Orders FROM previous report (quarter)	1	
2	Total number of new Job Orders received	0	
3	Total number of Job Orders processed	0	
4	Total number of SWA staff assisted intrastate referrals	0	
5	Total number of SWA staff assisted interstate referrals	0	
6	Total number of interstate job orders transmitted to other SWAs	0	
7	Total number of interstate job orders received FROM other SWAs	0	
8	Total number of Union contacts made	0	
9	Total number of active Job Orders remaining at the end of the quarter	1	
10	List the most common deficiencies noted on job orders:		
11	Provide comments or other issues noted during quarter:		

Sample ETA 9127 Report, part 1 of 2

	H-2A Workload	H-2A Regular	H-2A Special Procedures
1	Total number of active Job Orders FROM previous report (quarter)	0	
2	Total number of new Job Orders received	0	
3	Total number of Job Orders processed	0	
4	Total number of SWA staff assisted intrastate referrals	0	
5	Total number of SWA staff assisted interstate referrals	0	
6	Total number of interstate job orders transmitted to other SWAs	0	
7	Total number of interstate job orders received FROM other SWAs	0	
8	Total number of active Job Orders remaining at the end of the quarter	0	
9	Total number of prevailing wage surveys completed	0	
10	Total number of employment practice surveys completed	0	
11	Total number of housing inspections completed by SWA staff	0	
12	Total number of housing inspections completed by alternative method	0	
13	Total number of sleeping units inspected	0	
14	Total capacity of sleeping units inspected	0	
15	Total number of housing self-certifications received FROM employer	0	
16	List the most common deficiencies noted on job orders:		
17	Provide comments or other issues noted during the quarter:		

Public Burden Statement:
According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 2 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is mandatory (20 CFR 653.112) Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor, Office of Foreign Labor Certification, Room C-4312, 200 Constitution Avenue, NW, Washington, D.C. 20210, or by email to ETA.OFLC.Forms@dol.gov and reference the OMB Control Number 1205-0457. Note: Please do not return the completed ETA-9127 form to this address.

Sample ETA 9127 Report, part 2 of 2

Legacy Performance

The Legacy Performance reports display WIA, WP and ARRA Legacy Performance Reports.

▼ **Legacy Performance**
Display WIA, WP and ARRA Legacy Performance Reports.

▶ **ETA WIA 9090 Quarterly**
Reports displaying information about ETA WIOA 9090 Quarterly.

▶ **ETA WIA 9091 Annual**
Reports displaying information about ETA WIOA 9091 Annual.

▶ **ETA WP 9002/VETS200 Quarterly**
Reports displaying information about ETA WP 9002/VETS200 Quarterly.

Legacy Performance Reports Menu

Supplemental Nutrition Assistance Program (SNAP)

The WIT system generates the standard SNAP E&T and Choices WTP reports required by the U.S. Department of Agriculture and U.S. Department of Health and Human Services.

▼ **SNAP Employment and Training**
Display Federal SNAP Employment and Training Reports.

Annual State Component Details	Annual Summary Report
Completion of Component Details	Median Earnings Details
Participant Characteristics	SNAP Employment and Training 583
Unsubsidized Employment 2nd Quarter Details	Unsubsidized Employment 4th Quarter Details

SNAP Reports Menu

Component	Month 1	Month 2	Month 3	Quarterly Total	Fiscal YTD
Number of ABAWD Applicants and Recipients participating in qualifying components	0	0	0	0	0
Number of Non-ABAWD applicants and recipients (including ABAWDs involved in non-qualifying activities participating in components	0	0	0	0	0
Component	Month 1	Month 2	Month 3	Quarterly Total	Fiscal YTD
Report Totals	0	0	0	0	0
					Total Rows: 2

Sample SNAP 583 Fiscal Year Report

Veteran Priority of Service

The Veteran Priority of Service Survey report provides information about the state and local agency implementation of Priority Services for Veterans. Staff can filter the report by Region LWDB, Office, and date.

The report displays the number of post 9/11 participants and the number of new enrollees receiving intensive or staff assisted services.

▼ Veteran Priority of Service

  Priority of Service Federal Survey

Veteran Priority of Service Report Menu

State	TX
Number of Post 9/11 Participants	0
Number of new enrollees receiving intensive or staff assisted services	0

Sample Priority of Service Report

WIOA Performance

The WIT system complies with U.S. Department of Labor-mandated Participant Individual Record Layout (PIRL) Data

Extracts that enable TWC to report through the Workforce Integrated Performance System (WIPS). The system uses these extracts to generate Quarterly (ETA-9173) and Annual (ETA-9169) performance reports. Staff can specify the parameters for the federal extracts, such as reporting quarter and file location. States may run separate ETA-9173 (PIRL) reports by Local Workforce Development Board (LWDB), which can be accessed and reviewed by regional staff.

WIOA Performance Reports Menu

SUMMARY INFORMATION				
Service	Participants Served	Participants Exited	Funds Expended	Cost Per Participant Served
Career Services	0	0		
Training Services	0	0		
Percent training-related employment:		Percent enrolled in more than one core program:		Percent Admin Expended:
0.00%		0.00%		0.00%

BY PARTICIPANT CHARACTERISTICS													
	Total Participants Served Cohort Period: 04-01-2023 - 06-30-2023	Total Participants Exited Cohort Period: 01-01-2023 - 03-31-2023		Employment Rate (Q2) Cohort Period: 04-01-2022 - 06-30-2022		Employment Rate (Q4) Cohort Period: 10-01-2021 - 12-31-2021		Median Earnings Cohort Period: 04-01-2022 - 06-30-2022	Credential Rate Cohort Period: 10-01-2021 - 12-31-2021		Measurable Skill Gains Cohort Period: 04-01-2023 - 06-30-2023	
				Num/ Den	Rate	Num/ Den	Rate	Earnings	Num/ Den	Rate	Num/ Den	Rate
Total Statewide	0	0	Negotiated Target		0.00%		0.00%	$0.00		0.00%		0.00%
			Actual	0 / 0	0.00%	0 / 0	0.00%	$0.00	0 / 0	0.00%	0 / 0	0.00%
Sex												
Female	0	0		0 / 0	0.00%	0 / 0	0.00%	$0.00	0 / 0	0.00%	0 / 0	0.00%
Male	0	0		0 / 0	0.00%	0 / 0	0.00%	$0.00	0 / 0	0.00%	0 / 0	0.00%

Sample ETA 9169 – WIOA Statewide and Local Performance Report

Live Data Category

This category contains Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

▼ **Live Data**
Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

Employer Registrations   Individual Registrations
Job Orders   Resumes
UI Weekly Certifications

Live Data Menu

SQL Query Tools Reports Category

When staff work from the left navigation menu, locate the Reports group, and select **SQL Query Tools**, the system displays the following menu:

SQL Query Tools

Ad-Hoc Query Tool
The Ad-Hoc Query Tool is a feature in this system that assumes the user has a working knowledge of managing and retrieving data from relational database systems. It is not designed to be used by people who are not familiar with database queries.

Free Form SQL Tool
This tool allows you to create and save free-form ad-hoc queries of the system using the SQL programming language. This functionality should only be used by staff who are knowledgeable in constructing queries in SQL.

Easy Query
This tool allows you to create simple ad-hoc queries by clicking on selections. It also allows you to save the results to Excel, CSV or PDF files.

Data Warehouse
This tool allows you to develop and run 3 dimensional data cubes against the Data Warehouse.

Data Dictionary
This tool allows you to view table and column descriptions.

SQL Query Tools Options Screen

Note: The Data Warehouse option is not in use at this time.

Refer to the topics that follow to learn more about these tools.

Ad-Hoc Query Tool

The Ad Hoc Query Tool guides the user step-by-step through report creation and provides the ability to sort, group, and filter the data. After staff create an ad hoc report, the system can store the query definitions in a shared area for use by other users.

Using the Ad Hoc Query Tool, staff can post custom reports for access with the other standard reports, using all the standard

filtering and sorting controls, and incorporating those controls into their custom report. With this capability, users can design their own on-demand reports to monitor services and required follow-up.

Once the query is finalized, staff can view, test, and verify results. The system displays the results in tabular fashion based on the columns selected in the query. The user can then re-do the query if an issue exists, or save, export, and print the results through in various formats.

To generate an Ad-Hoc Query report, staff perform the following:

1. Select the **Ad-Hoc Query Tool** link.

2. Perform the following steps in the Query Builder section:

    i.   In the Object Type section, select **Tables and Views**.

Object Type Section of the Ad-Hoc Query Tool

    ii.   In the Category section, select the following checkboxes:

       1) Individual Registration

       2) Programs Applications

       3) Lookup Tables

Category Section of the Ad-Hoc Query Tool

iii.   In the Primary Table section, select **tbl_case**.

Primary Table Section of the Ad-Hoc Query Tool

iv.   In the Optional Joins section

1) Maintain the **JOIN** radio button selection.

2) From the Select Table to JOIN from list box, select **ind**.

3) From the Select Column to JOIN from list box, select **ind.col_UserID**.

4) Maintain the value of **tbl_case.col_caseid** in the Select Column to JOIN to list box.

5) Select the **plus sign** in the right margin to save your selections.

Optional Joins Section of the Ad-Hoc Query Tool

v. In the Selected tables section, select **ind**.

vi. In the Available Columns list box, select the following column names and then select the right-facing arrow to push these columns to the Selected Columns list box:

Note: Experienced users might prefer to hold down the **Ctrl** key while selecting desired column names.

1) Ind.col_UserID

2) Ind.firstname

3) Ind.lastname

4) Ind.ssn_v

5) Ind.mailaddress1

6) Ind.mailaddress2

7) Ind.mailcity

8) Ind.mailstate

9) Ind.mailzip

Note: Staff can remove a selected columns name by clicking that name and then clicking the left-facing arrow to put the column name back in the Available Columns list box. Staff can also change the display order by clicking a selected column name and then clicking the up or down arrows displayed beneath the list box.

vii. Click the **plus sign** in the right margin to save your selections.
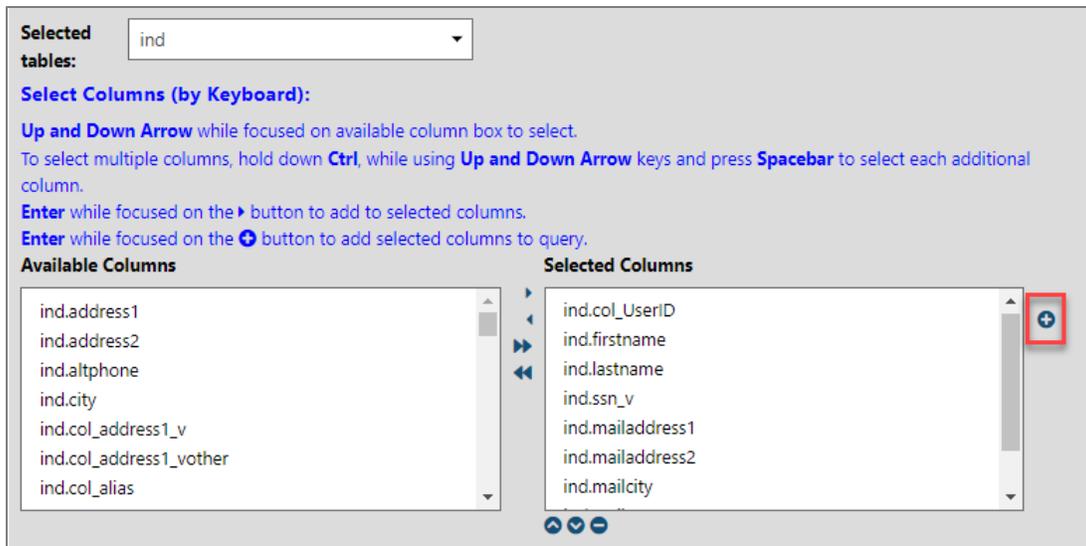
Selected Tables Section of the Ad-Hoc Query Tool

viii.   Ignore the Column Options section.
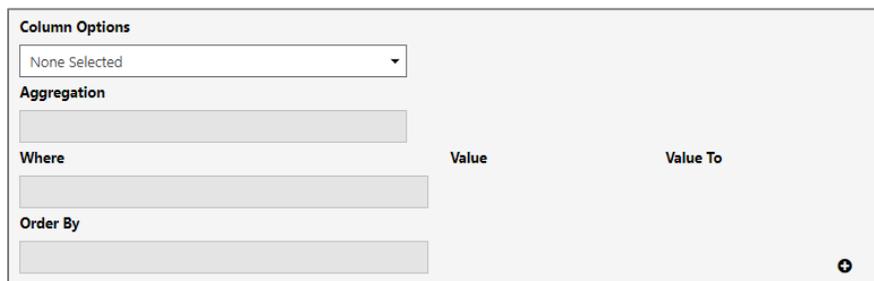
Column Options Section of the Ad-Hoc Query Tool

ix.   In the Preview section, select **Execute**.

Note: The system displays all staff's selections in this section. Besides executing the query, staff can parse the query (to check the SQL syntax), start the query over again, or save the query for future use.
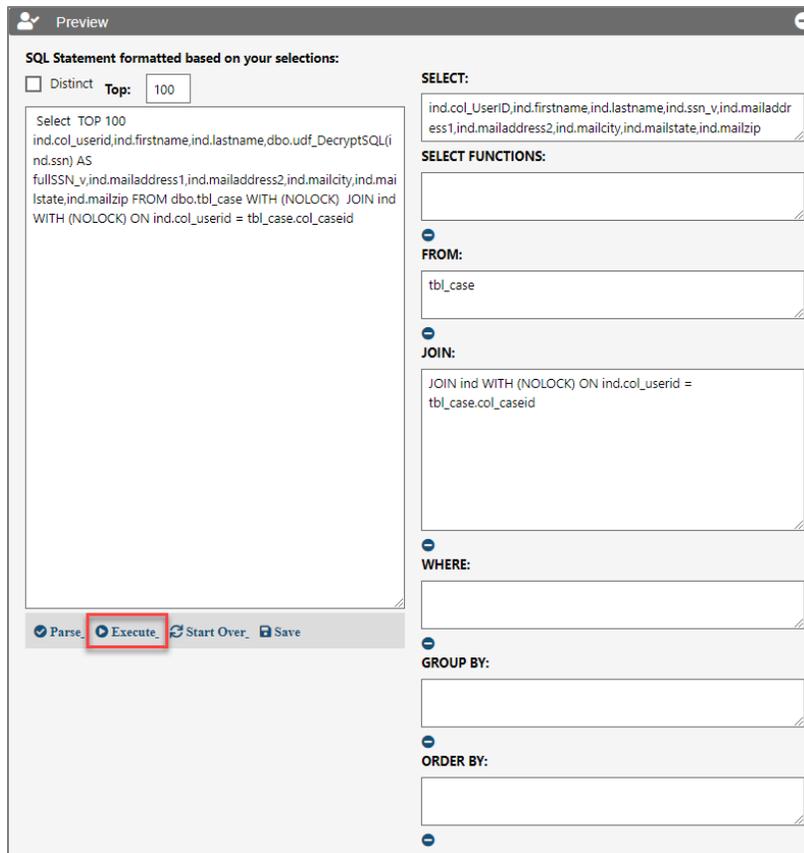
Preview Section of the Ad-Hoc Query Tool

x. Staff can view the results of the query in the Results section, as shown below.

Results Section of the Ad-Hoc Query Tool

Free Form SQL Tool

Authorized staff with knowledge of SQL can create queries directly within the WIT system to generate data from any of the underlying data tables in a free-form query window. The free-form query tool allows the user to create a range of queries from simple select queries to sophisticated SQL queries requiring joins across many tables, nested conditions, aggregated result sets, and column ordering. As with the Ad Hoc Query Wizard, once the query is finalized, staff can view, test, and verify results. The system displays the results in tabular fashion based on the columns selected in the query. The user can then re-do the query if an issue exists, or save, export, and print the results through in various formats.

Following is a sample free form query.
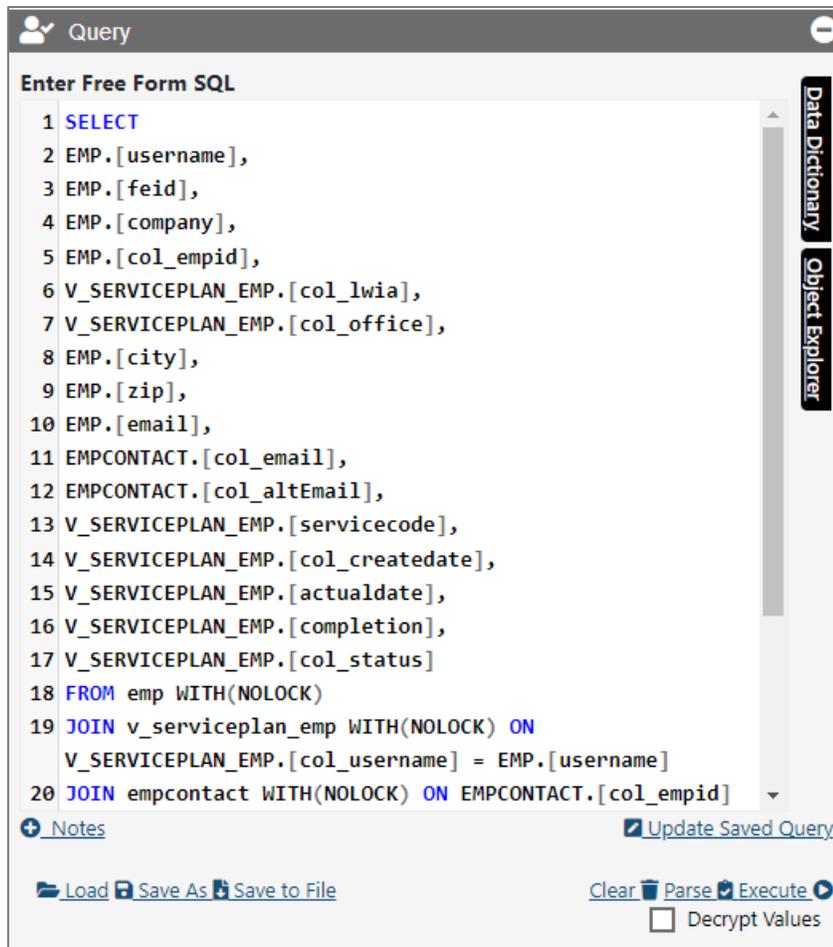
Sample Free Form Query

When staff clicks **Execute**, the system will display the report output in the Results window, as shown below.

Results Section of the Free Form SQL Tool

Easy Query

This tool eliminates much of the guesswork involved in selected tables and columns to join data for report generation purposes. Novice users will probably prefer this SQL query tool for its simplicity.

To create a custom report using the Easy Query Tool:

1. Select the **Easy Query** link.

2. In the top section, click the **Click here to add a new column** link.

3. Select **Individual > Ind > (All)**.
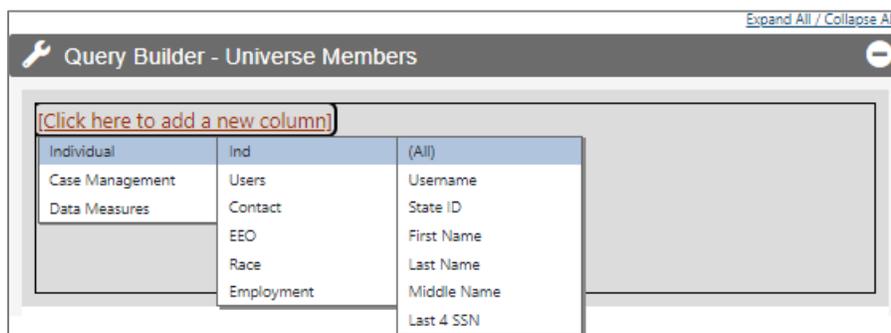
Column Selection for the Easy Query

4. Skip the section to add new conditions.

5. Access the Preview section to view the system-generated SQL query.

```
SELECT ind.username [Username],indstaff.StateID,ind.Firstname,ind.lastname,ind.Middle,
ind.col_lastfourssn as [Last 4 SSN]
FROM (ind AS ind WITH ( NOLOCK )
    LEFT OUTER JOIN indstaff AS indstaff WITH ( NOLOCK ) ON (ind.username =
indstaff.username ))
```

Preview Section of the Easy Query

6. Access the Results section to view the custom report.

Excel CSV PDF Print

Username	StateID	Firstname	lastname	Middl
10000	928	Pancho	Pantera	
10001	929	Mitsy	Owens	
10002	930	Blue	Pineapples	
10003	931	New	User	
10004	932	Lynda	Carter	
10005	933	John	Smith	J
10006	934	Pickles	TheChi	M
10007	935	Boyd	Sheffield	
10008	936	JOHN	DOE	1
10010	937	Chris	Evans	A

Results Section of the Easy Query

Data Dictionary

To assist staff in creating ad hoc reports, staff can view all the available tables to query and the column and column properties within the table through the Data Dictionary functionality. Staff can select a table they want to view via drop-down control and the system will display all the columns in that table, the column data type, and any specific values in those columns, where applicable. The user will also be able to identify the columns that are listed as the primary or foreign keys to aid in joining tables. This feature provides the user the ability to quickly identify the tables they may want to use in an ad hoc query, research different tables and column information, and help troubleshoot issues in query design.

To use the Data Dictionary:

1. Select the **Data Dictionary** link.

2. Enter **username** for the keyword.

3. Enter **ind** for the table name.

4. From the list of match results, select **ind**.

5. Click **Search**.

Welcome to the Data Dictionary

Keyword:

username

Database:

VOS ▾

Table:

ind

🔍 Search

Keyword Search for the Data Dictionary

6. In response, the system displays the following information:

Table Information: ind

Column Name: username
PK
CHECK
Data Type: varchar(20)
GSI Description: Unique User Name to maintain system integrity
GSI Notes: This cannot be modified.

Data Dictionary Search Results