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Business Services Reports Training

May 26, 2021

Training Agenda



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- Reports Overview
- Demonstration of Common BSR Reports
- Questions
- Resources
- Upcoming Trainings

Straw Poll...



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**Bendy, Straight,
or Wacky?**

Reports Overview



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- All staff have access to all Career Connect “canned” reports.
- All reports have some common features:
 - Filters to tailor the data
 - Filters listed at the top of the report results screen
 - Ability Reset or Update filters
 - On screen sorting
 - Ability to export into multiple formats
- Many reports have blue hyper links to sub-reports and/or the employer / job order / participant record. (Hyper links only work on-screen – not in downloaded reports.)
- You can save frequently used reports / filters for 1-click access.

Reports Overview - Navigation



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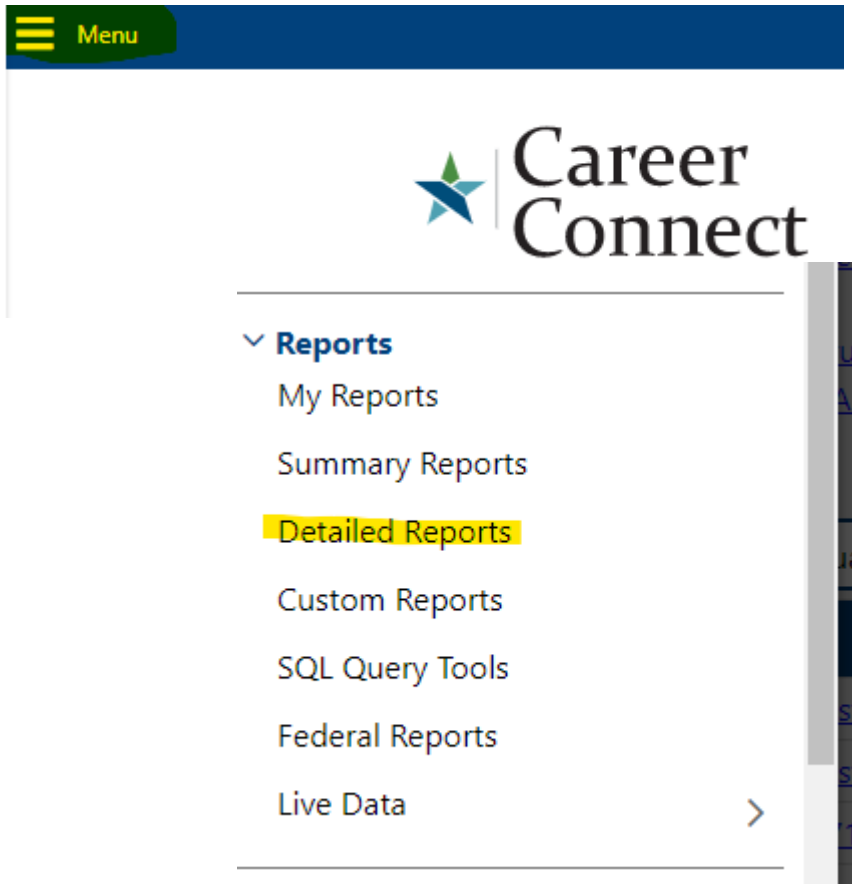
- [Case Mngt & BSR Report Guide](#) contains the key reports needed to submit monthly reports & manage your data.
- Report Title & Monthly Report includes:
 - Career Connect report title
 - applicable section of the monthly report that agencies submit to Programs
- Navigation: Provides the path to run the report
- Filters & Instructions:
 - Lists the basic filters for returning the data for monthly reports
 - Any special instructions
- Description: Brief description of the report data

Reports Overview - Navigation



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- Access reports using the Left Navigation Menu – Reports Menu
- Most reports can be accessed via “Detailed Reports”
- “My Reports” is where you’ll find your saved reports.

Reports Overview - Filters



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- Filter options vary by report
- Most common filters are Office & Date Range
- Create Date / Last Edit Date pulls data based on when the record was initially created (typed in) or last edited in Career Connect
- The reports guide lists recommended filters

Office Location:
(Press Ctrl to select multiple items)

None Selected

A.E.R.O. Special Education Cooperative (71 ...)

African American Christian Foundation (71 ...)

Albany Park Community Center (1262)

Filter By Date:

Create Date

Date Range:

Last 7 Days

From: 04/30/2019 (MM/DD/YYYY)

To: 05/06/2019 (MM/DD/YYYY)

Reports Overview - Filters



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- Some filters have a select multiple option. To select multiples, hold down the Control “Ctrl” button and click each selection.
- To return all data in a filter category, use “None Selected”.

Office Location:

(Press Ctrl to select multiple items)

None Selected

A.E.R.O. Special Education Cooperative (7101)

African American Christian Foundation (7103)

Albany Park Community Center (1262)

Reports Overview – On-Screen Tools

- Reports return with the report name and selected filters listed at the top.
- If you chose an incorrect filter, use the “Update Search Criteria” link (at the bottom of the screen) to update your filters.
- “Reset Search Criteria” resets all the report filters.

Services Provided Employer Reports - List
Region/LWIA: Chicago Cook Workforce Partnership
Actual Date: 7/1/2019 - 6/30/2020
Report Run Time: 5/19/2021 3:01:53 PM

Location	Service Code	Staff Reported	Cre Da
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[Reset Search Criteria](#) / [Update Search Criteria](#)

Select Another Services Provided Employer Report

Return to Manage Reports

Reports Overview – On-Screen Tools

- Reports may span across multiple pages. Click the arrows on either side of the number of pages to navigate between pages on-screen.



Job Order Report - List

- Region/LWIA: Chicago Cook Workforce Partnership
- Active Date: 7/1/2018 to 6/30/2019

- Reports may display wider than your computer screen. Scroll to the bottom of the report screen to access the side-to-side scroll bar.

Emp. ID	Company Name	Industry	Contact	Location	Service Code	Staff Reported	Create Date	Actual Date
Total Rows: 1,634								



Reports Overview – On-Screen Tools

Job Order Report - by Employer

DisplayFormat: Job Order Information Only
 Region/LWIA: Chicago Cook Workforce Partnership
 Active Date: 7/1/2019 to 6/30/2020
 Report Run Time: 5/19/2021 3:06:37 PM

Employer	Total Job Orders	Total Job Openings	Total Job Referrals
ABC Company	1	1	0
ABC Company	1	4	0
ABC Company	1		
ABC company	1		
abc company	1		
ABC Company	1		
ABC Company	1		
ABC Company	1		
ABC Company	1		
ABC Company	2		
ACME	1		
Ain't She Sweet Cafe	1		
Alden Estates of Evanston	1		
Apex Construction Group, Inc	1		
Avcoa	1		
Dana's Bizness	1		

Click on any column header to sort by that column



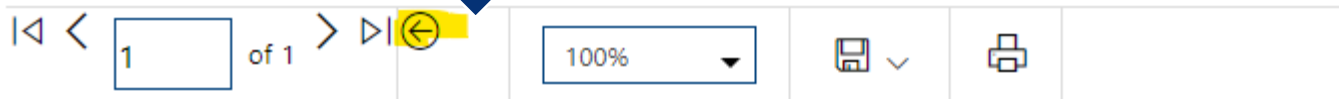
Job Order Report - by Employer

DisplayFormat: Job Order Information Only
 Region/LWIA: Chicago Cook Workforce Partnership
 Active Date: 7/1/2019 to 6/30/2020
 Report Run Time: 5/19/2021 3:06:37 PM

Employer	Total Job Orders	Total Job Openings	Total Job Referrals
Dana's Bizness	1	50	0
Wm Wrigley Jr Co	1	50	0
ABC company	1	5	0
abc company	1	5	0
ABC Company	1	5	0
ABC Company	1	5	0
ABC Company	1	5	0
ABC Company	1	5	0
ACME	1	5	0

Reports Overview – On-Screen Tools

Click the on-screen “back” button to go back to the summary (parent) report



Job Order Report - by Employer

DisplayFormat: Job Order Information Only

Region/LWIA: Chicago Cook Workforce Partnership

Active Date: 7/1/2019 to 6/30/2020

Report Run Time: 5/19/2021 3:06:37 PM

Click on blue links to see detailed sub-report (child report)

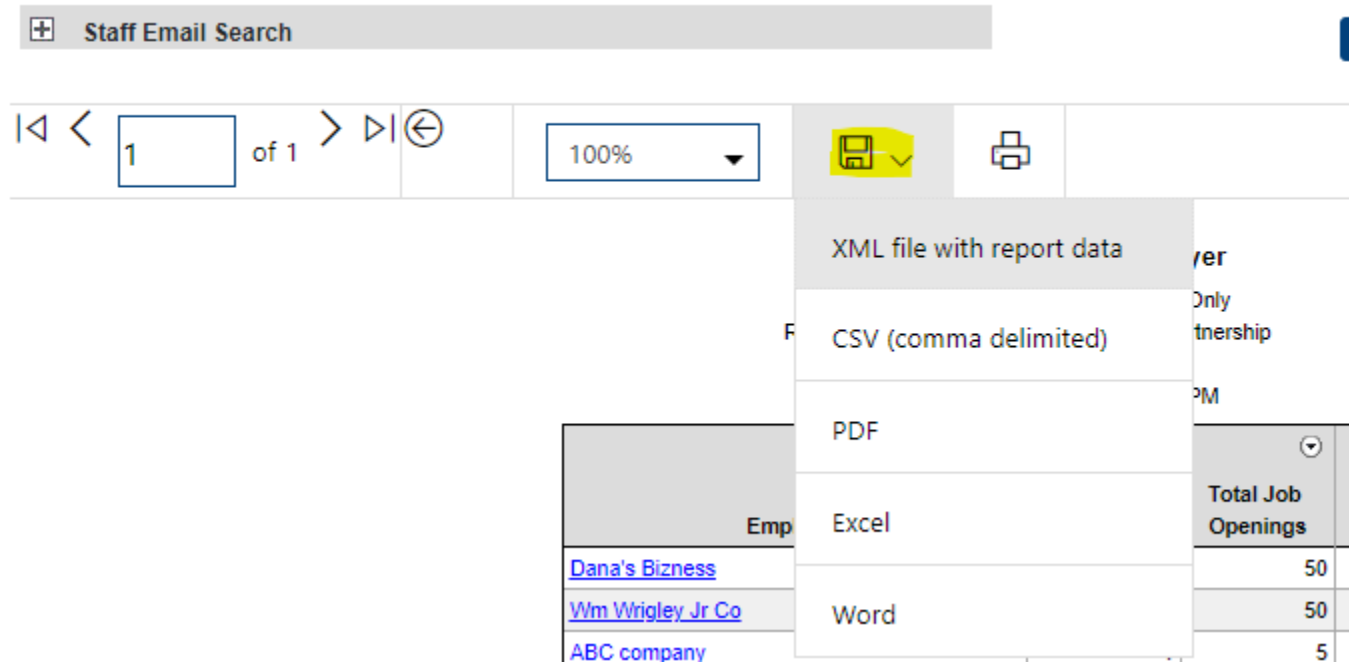
Employer	Total Job Orders	Total Job Openings
Dana's Bizness	1	50
Wm Wrigley Jr Co	1	50
ABC company	1	5

Click on blue ID # to go to record (i.e. Job Order or Employer)

Order #	Job Title	Occupation Code (O*Net)	Occupation Description (O*Net)	Employer	Employer Worksite	Ch
14635	Parts Clerk	41202200	Parts Salespersons	Dana's Bizness	Dana's Bizness	Ch

Reports Overview – On-Screen Tools

- Click on the arrow next to the disk icon towards the top of the report to select a download option.
- Excel or CSV are the best options for manipulating the data.



The screenshot shows a report titled "Staff Email Search". The interface includes a navigation bar with a page number "1 of 1", a zoom level of "100%", and a download icon (a disk with a checkmark) that is highlighted in yellow. A dropdown menu is open from the download icon, listing the following options: "XML file with report data", "CSV (comma delimited)", "PDF", "Excel", and "Word". Below the menu, a table is visible with columns for "Emp" and "Total Job Openings". The table contains three rows of data:

Emp	Total Job Openings
Dana's Bizness	50
Wm Wrigley Jr Co	50
ABC company	5

Reports Overview – “My Reports”



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“My Reports” allows you to save reports that you run frequently & run them with one click:

1. On the reports filter page, set your filters.
2. Click “Save to My Reports”.



Run Report



[Save to My Reports]

[[Select Another Case Load Report](#)]

Reports Overview – “My Reports”



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3. A pop-up box will appear. Enter a descriptive name for the report. (For example, “Adult Active Cases-Current Program Year”)
4. Keep “Do Not Share” selected
5. Click “Save”

A screenshot of a web application's 'Report Summary' pop-up box. The box has a white background and a dark blue header with the word 'Date' in white. The title 'Report Summary' is centered at the top. Below the title, there are two sections: 'New Report Description:' with a text input field containing 'Job Order PY 2019', and 'Share Report:' with two radio button options: 'Do Not Share' (selected) and 'Share with everyone with access to this report'. At the bottom, there are two buttons: a green 'Save' button and a blue 'Cancel' button.

Date

Report Summary

New Report Description: Job Order PY 2019

Share Report:

- Do Not Share
- Share with everyone with access to this report

Save Cancel

Reports Overview – “My Reports”



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6. To retrieve your report, go to *Reports > My Reports > My Reports (section)*

▼ Reports

My Reports

Summary Reports

Detailed Reports

Custom Reports

SQL Query Tools

Federal Reports

Live Data

Location

Region/LWDB Status: Active Inactive All

Region/LWDB:
Tollway

Office Status: Active Inactive All

Office Location:
A Safe Haven (CCLC)
A.E.R.O. Special Education Cooperative (7101)
African American Christian Foundation (7102)

My Reports

Report Description
Job Order PY 2019
Shared Placement IT Sector

Reports Overview – “My Reports”



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7. Click on “Display Report” to display with the original filters
8. Click on “Update Filters” to update any filters. (Note if your original date range was a custom range through the current date, you will need to update the “To” date every time you run the report.)

My Reports	
<u>Report Description</u>	<u>Action</u>
Job Order PY 2019	Update Filters Display Edit Delete Schedule
Shared Placement IT Sector	Update Filters Display Edit Delete Schedule

Common BSR Reports



Report Name	Report #*
All reports in the Business Services Reports section	BSR-1 to BSR-10
All reports in the Events Reports section	EV-1 & EV-2
Obtained Employment	5a
Shared Placements	5b
Training (filter for OJT & Customized Training codes)	8a
On-the-Job Training	8b
Work Experience	8c
Wage Reports	21
New Hire Query	25a
Background Employment Query	25b
DETS/Rapid Response Event for WIOA Participants	27

*Report # refers to the number in the [Case Management & BSR Report Instructions](#).

New Report – Job Order Contact



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- Detailed Reports > Misc. > Contact > Job Orders
- Provides details of job orders, including employer and job order contact
- To see only open job orders:
 - Set the “Staff Job Order Status” filter to “Open and Available”
 - Set “Filter by Date” to “Active Date”
 - Set “Date Range” to “Today”



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Questions?

For further assistance contact the Career Connect
Help Desk at:

<https://workforceboard.zendesk.com/hc/en-us>

or

helpdesk@chicookworks.org



- **Case Management & BSR Report Instructions:**

<https://workforceboard.zendesk.com/hc/en-us/articles/115002782311>

- **ISTEP & OJT Service Procedure:**

<https://workforceboard.zendesk.com/hc/en-us/articles/115003199131>

- **Shared Placement Procedure:**

<https://workforceboard.zendesk.com/hc/en-us/articles/360029587491>

Upcoming Trainings



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- **BSR Reports Training - 5/26 BSR Meeting**

<https://attendee.gotowebinar.com/register/3417302340343705100>

- **Career Connect Business Services Training 5/27/21**

<https://attendee.gotowebinar.com/register/4365821334807472651>

- **Customized Training 6/1/21**

<https://attendee.gotowebinar.com/register/4460653113194877964>

- **On-The-Job Training 6/8/21**

<https://attendee.gotowebinar.com/register/4897422012701037324>