

Career Connect Reports Overview

May 19, 2022



Overview & Contents

Staff have access to most of the “canned” reports in Career Connect. This document provides a general overview of how to access and run the reports. It also includes links to additional reporting resources.

1. Reports Basics

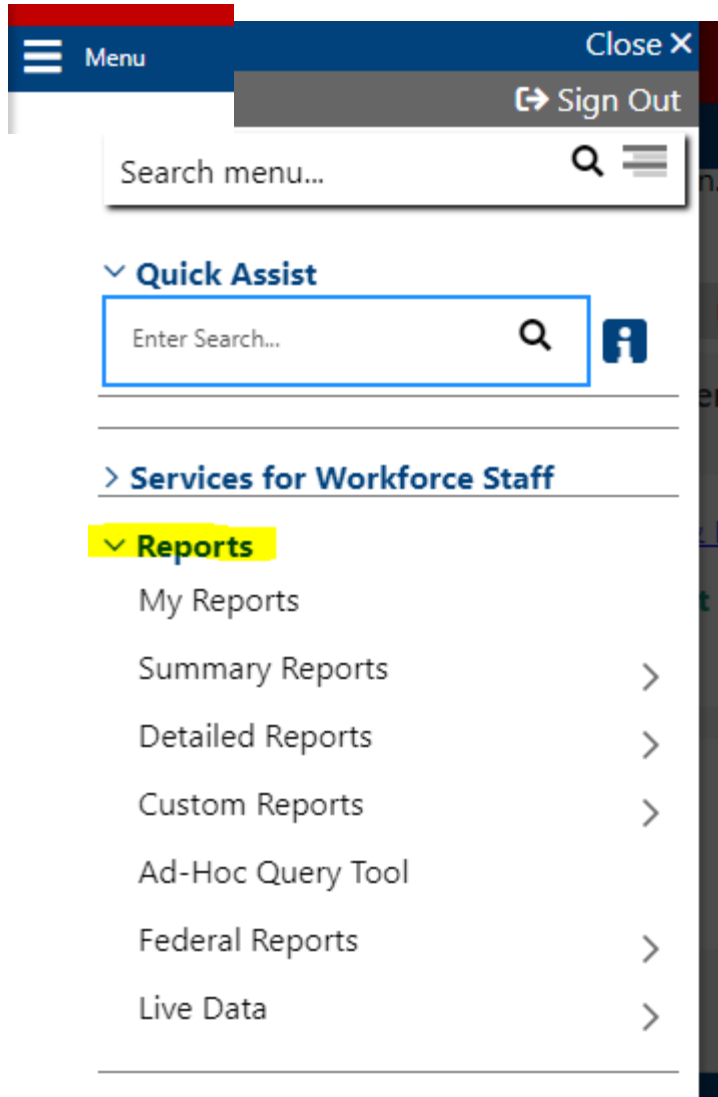
- Navigation
- Filtering
- Downloading
- Saving to “My Reports”

2. Report Guide

3. WIOA Performance Reporting Resources



Report - Navigation




- Open the left-hand navigation menu and find the “Reports”
- Click on “Reports” to access the main reports menu page.

Pro Tip: If you know which section the report is in, click on the sub-header and then the report section. The Reports Menu page will have that section expanded.




Reports - Navigation

The Reports Menu page has multiple sections and sub-sections. Use the “+” and “-” signs or the arrows to expand or collapse sections.

 For help click the information icon.

[Expand All / Collapse All](#)

-  Report Tools 
 -  Last Viewed 
 -  Reports Finder 
 -  Reports Menu 
-



Reports - Navigation

- The Reports screen has 4 main sections:
 - **Report Tools:** links to “My Reports” and “Query Tools”
 - **Last Viewed:** quick links to the last 2 reports ran
 - **Reports Finder:** search function
 - **Reports Menu:** directory of reports by menu and sub-menu.



Reports – Navigation

Reports Menu:

- Click the arrow next to the menu header to expand and see the available reports
- Most commonly used reports are in the “Detailed Reports” section.
- The reports guide (described below) provides the menu path for common reports.

☰ Reports Menu

▶ Summary Reports

Dashboard, Executive, Master and Trending reports. Select this option to view executive summary reports and dashboards sur

▼ Detailed Reports

Outline specific information in the system by a variety of parameters and filters. Areas include Attendance, Case Management, 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 indicat

▶ Employer Reports

The Employer Reports group provides data such as internal and external job order information, employer registration in

▶ Individual Reports

The Individual Reports group provides data on registered or enrolled individuals, mainly from information provided by in

▶ Provider Reports

Reports displaying information about provider institutions, their programs, and contacts.

▶ 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.

▶ Custom Reports

Create, edit and share custom reports with your team, department or even other states. Select this option to view reports deve



Last Viewed: click the link to re-run one of the last two reports ran

 **Last Viewed**

Last Viewed Reports

[CaseManagement - CaseLoad - CasesByParticipation 5/16/2022 5:33:06 PM](#)

[Participant Summary - Participant Summary WIA 5/13/2022 6:24:05 PM](#)



Reports Tools:

- Click the “My Reports” link to saved reports
- Instructions for saving reports to “My Reports” are below

Report Tools

My Reports

Manage your saved reports and view ones from other regions. Select this option to display specific reports that you have previously saved.

[My Reports](#)

Report Basics

- All reports have some common features:
 - Filters to tailor the data
 - Filters listed at the top of the report results screen
 - Ability to 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 customer record. (Hyper links only work on-screen – not in downloaded reports.)



Report Filtering

- Filter options vary by report
- Most common filters are: Program, Customer Group (for WIOA), Office, Date Filter (i.e., date type) & Date Range
- The guide provides recommended filters for each report

Program

Program:

Customer Group:

Office Location:
(Press Ctrl to select multiple items)

Date Filter:

Date Range:

From: (MM/DD/YYYY)

To: (MM/DD/YYYY)

[Reset Dates](#)



Report Filtering

- 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)



Report Filtering



The “Date Filter” option varies by the type of data, but “create date” is always the day the record (e.g. application, service, job order, etc.) was entered in Career Connect. “Last Edit Date” is the day the record was last updated.



The screenshot displays a report filtering interface. At the top, there is a dark blue header bar. Below it, the 'Date Filter:' label is highlighted in yellow. A dropdown menu is open, showing the following options: 'Create Date' (highlighted in blue), 'Last Edit Date', 'Projected Begin Date', 'Actual Begin Date', 'Projected End Date', and 'Actual End Date'. To the right of the dropdown, there is a date range section with 'From:' and 'To:' labels. The 'To:' field is populated with '05/18/2022'. A calendar icon is visible next to the date. To the right of the date range, there is a '(MM/DD/Y)' label. Below the date range, there is a 'Reset Dates' link.



Report Filtering

The Date Range for “Current Program Year” and “Previous Program Year” is always July 1st thru June 30th. If you have an Oct. 1st – Sept 30th contract, use the “Custom Date” option and set the “To/From” dates.

Date	
Date Range:	Current Program Year ▼
From:	07/01/2017  (mm/dd/yyyy)
To:	06/30/2018  (mm/dd/yyyy)

Date	
Date Range:	Custom Date ▼
From:	10/01/2017  (mm/dd/yyyy)
To:	09/30/2018  (mm/dd/yyyy)

[Reset Dates](#)



Report Results Screen

- 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.

Active Cases Report			
- Report Type: LWIA/Office Location			
- Program: Title I - Workforce Development			
- LWIA/Region: Chicago Cook Workforce Partnership			
- Date Range: 07/01/2017 - 06/30/2018			
Office/Location	Active Cases	Closed Cases	Exit Cases

[Reset Search Criteria](#) / [Update Search Criteria](#)

Select Another Case Load Report





Report Results Screen

Click on arrows in column header to sort by that column

Office/Location
Erie Neighborhood House-Healthcare Bridge (7176)
Phalanx Family Services (1002)
ServiceWorks (1026)
LaGrange Department of Special Education
Maywood Workforce Center (7200)
Boys & Girls Clubs of Chicago-S. Emerald S
Erie Neighborhood House - Mnfg Bridge (71
National Able Network (8150)
Aunt Marthas Youth Services (7105)
Cicero Workforce Center (7600)

Report
 Office Location
 Force Development
 Workforce Partnership
 17 - 06/30/2018

Closed Cases	Exit Cases
0	0

Active Cases Report
 - Report Type: LWIA/Office Location
 - Program: Title I - Workforce Development
 - LWIA/Region: Chicago Cook Workforce Partnership
 - Date Range: 07/01/2017 - 06/30/2018

Office/Location	Active Cases	Closed Cases	Exit Cases
A.E.R.O. Special Education Cooperative (7101)	51	10	10
African American Christian Foundation (7103)	31	1	1
Albany Park Community Center (1262)	23	0	0
Alternative Schools Network (1000)	281	0	0
America Works of Illinois (7012)	59	0	0
Arlington Heights Workforce Center (8100)	604	18	18
Asian Human Services (1501)	56	1	1
Aspira, Inc. of Illinois (1060)	66	0	0
Aunt Marthas Youth Services (7105)	68	5	5
Bethel Community Facility (7130)	41	3	3
Boys & Girls Clubs of Chicago S. Emerald St (1127)	61	1	1



Report Results Screen

Active Cases R

- Report Type: LWIA/Offic
- Program: Title I - Workforce
- LWIA/Region: Chicago Cook Wc
- Date Range: 07/01/2017

Office/Location	Active Cases
Erie Neighborhood House-Healthcare Bridge (7176)	2
Phalanx Family Services (1002)	44




Click on blue #’s to see detailed sub (child)-report

User ID	Stat
258041	
72631	389500
47817	381012

Click on blue User ID to go to customer’s record

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

Staff Email Search

1 of 2 ? > > |  100%  

Active Cases Detailed Report



Report Exporting

- Click on the disc icon near the top of the reports results screen to select a download option.
- CSV is the best option for manipulating the data. The file will open in Excel, but does not have all of the formatting.

Staff Email Search

1 of 2

Active Cases Report

Type: LWIA/Office Location
Title: Workforce Development
Chicago Cook Workforce Partnership
Date: 07/01/2017 - 06/30/2018

Office/Location	Active Cases	Closed Cases	Exit Cases
Erie Neighborhood House-Healthcare Bridge (7176)	2	0	0
Phalanx Family Services (1002)	44	0	0
ServiceWorks (1026)	2	0	0
LaGrange Department of Special Education (7139)	44	11	11
Maywood Workforce Center (7200)	385	32	32
Boys & Girls Clubs of Chicago-S. Emerald St (1127)	61	1	1
Erie Neighborhood House - Mnfg Bridge (7174)	1	0	0



Report Exporting

- Many reports have confidential, personally identifiable information.
- Be sure to save reports in a secure location
- Do not share reports with individual-level information with people that should not have access to that information

Active Cases Report

Report Type: LWIA/Office Location

Program: Title I - Workforce Development (WIOA)

LWIA/Region: Chicago Cook Workforce Partnership

Date Range: 5/18/2022 - 5/18/2022

Report Run Time: 5/18/2022 3:06:30 PM

This Report contains Confidential Information and is intended for the Authorized Staff Users Only. Under no circumstances should this report or Individual Information contained therein be distributed or shared with Unauthorized Users.

↓	↓	↓	↓
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Saving to “My Reports”

“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

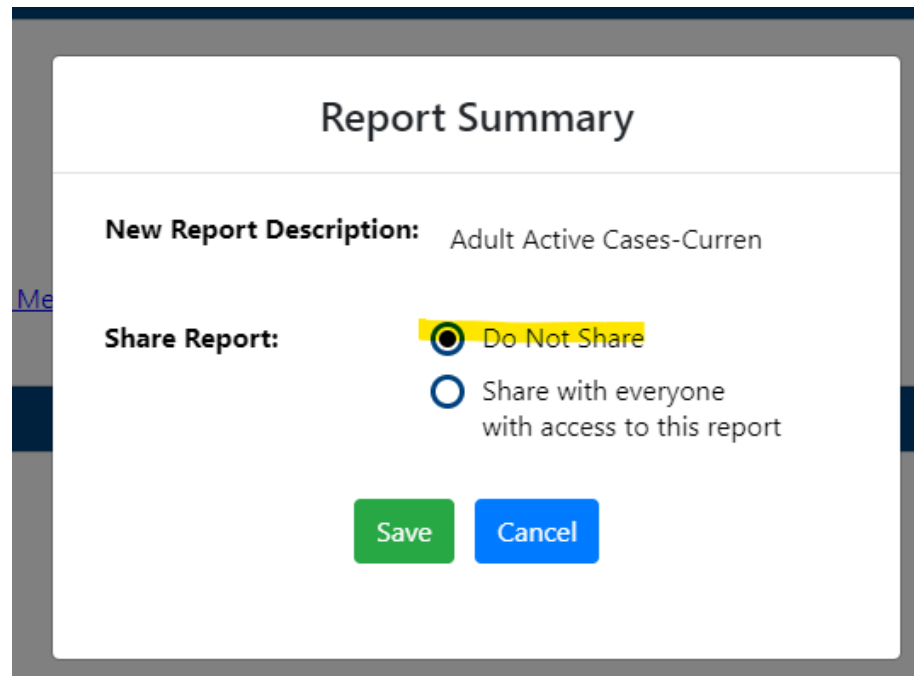
[Save to My Reports]

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



Saving to “My Reports”

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”



Report Summary

New Report Description: Adult Active Cases-Curren

Share Report:

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

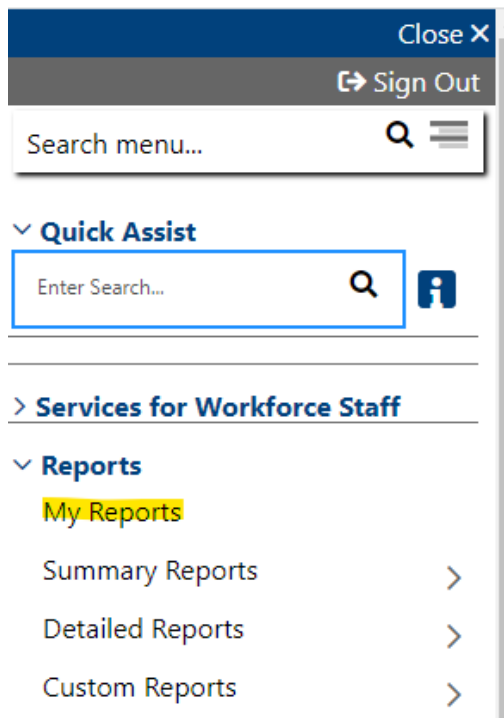
Save **Cancel**



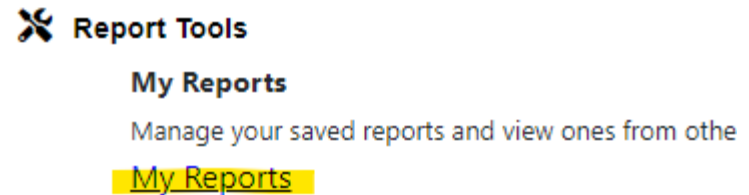
Saving to “My Reports”

6. To retrieve your report:

From the left-hand menu, go to *Reports* > *My Reports*



From the main reports menu page click *My Reports*



Saving to “My Reports”

7. Click on the “+” to expand the *My Reports* section. (You may need to filter by Region/LWDB and office to see your reports.)

The screenshot displays a web application interface with a dark blue header bar. On the left, there is a globe icon and the text "Location". Below this, there are four filter sections:

- Region/LWDB Status:** Three radio buttons are present: "Active" (selected), "Inactive", and "All".
- Region/LWDB:** A dropdown menu is open, showing "None Selected" (highlighted in blue), "IL Tollway", and "Chicago Cook Workforce Partnership".
- Office Status:** Three radio buttons are present: "Active" (selected), "Inactive", and "All".
- Office Location:** A dropdown menu is open, showing "None Selected" (highlighted in blue).

At the bottom of the interface, there is a dark blue sidebar with three items, each with a gear icon on the left and a plus sign on the right:

- My Reports:** The plus sign is highlighted in yellow, indicating it is the target of the instruction.
- My Scheduled Reports:** The plus sign is white.
- Shared Reports:** The plus sign is white.





Saving to “My Reports”

- 8. Click on “Display Report” to display with the original filters
- 9. 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:	
Report Description	Action
Adult Active Cases-Current PY	Update Filters Display Report Edit



Report Guide

- Lists commonly used reports including recommended filters and a description.
- Excel file with multiple worksheets:
 - WIOA Case Management
 - WIOA Performance
 - Business Services & Events
 - Non-WIOA Program Case Mngt
 - List-All Reports: a list of all the available reports in the system (not all reports are applicable to all staff / programs)
- <https://workforceboard.zendesk.com/hc/en-us/articles/6503046470541>



Report Guide

- Most tabs include the following:
 - *Report Title*: Career Connect report name
 - *Report Path*: Provides the path to navigate to the report via the menu
 - *Filters*: lists recommended report filters
 - *Description* includes:
 - Brief description of the report data
 - Instructions for any sub-reports
 - Other notes about the report data
 - *Monthly Report Item*: If the report is used for the WIOA monthly reports this column describes which monthly report item(s) it includes.
 - *Report # from Old Guide*: This is the report number from the prior version of the guide (for reference).



- For WIOA Performance report resources, also see the *WIOA Performance Webinar Series*:

<https://workforceboard.zendesk.com/hc/en-us/articles/360059762371>



Reports Next Steps

- Now that you have the basics:
 - Experiment with other filters
 - Try running other reports
 - Let us know if you find any good ones that aren't in the guide
- Email any reports questions or issues to the help desk: helpdesk@chicookworks.org (please include the report path and the filters selected).

