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Tableau Reporting Guide
# WIOA Title IB and Partner Programs

Purpose: This guide is intended as a resource for users of the Tableau reporting system for the purpose of monitoring program data collected in AZJobConnection.gov (AJC), the system of record for the WIOA Title IB and partner programs.

Contents

Navigation and Basic Functions
Upon login, users will be taken to the Home screen. This screen contains a Navigation pane on the left side, and folders and reports displayed in the main content area. These folders and reports are categorized by Favorites, Recents - those that have been accessed by you most recently, and Recommendations based on your viewing habits. Those categories are also accessible in the left-side navigation pane.
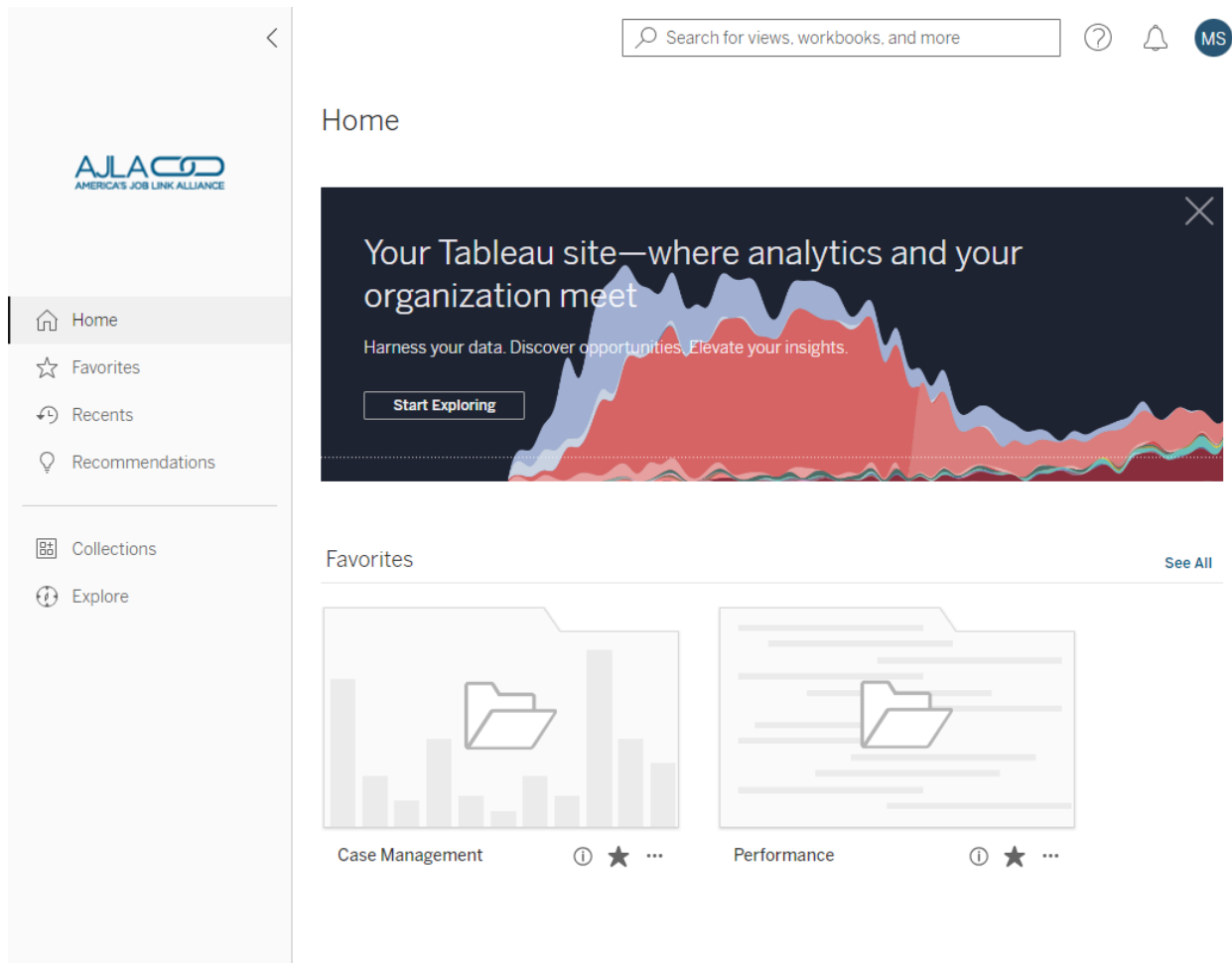

To view all folders and reports, select Explore. Then select the Arizona folder.
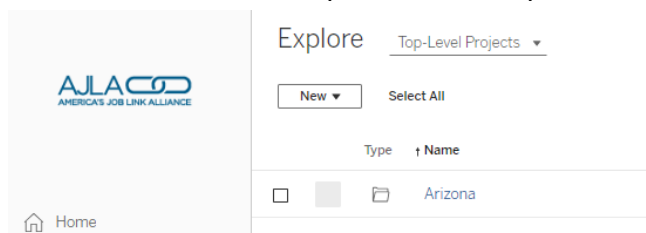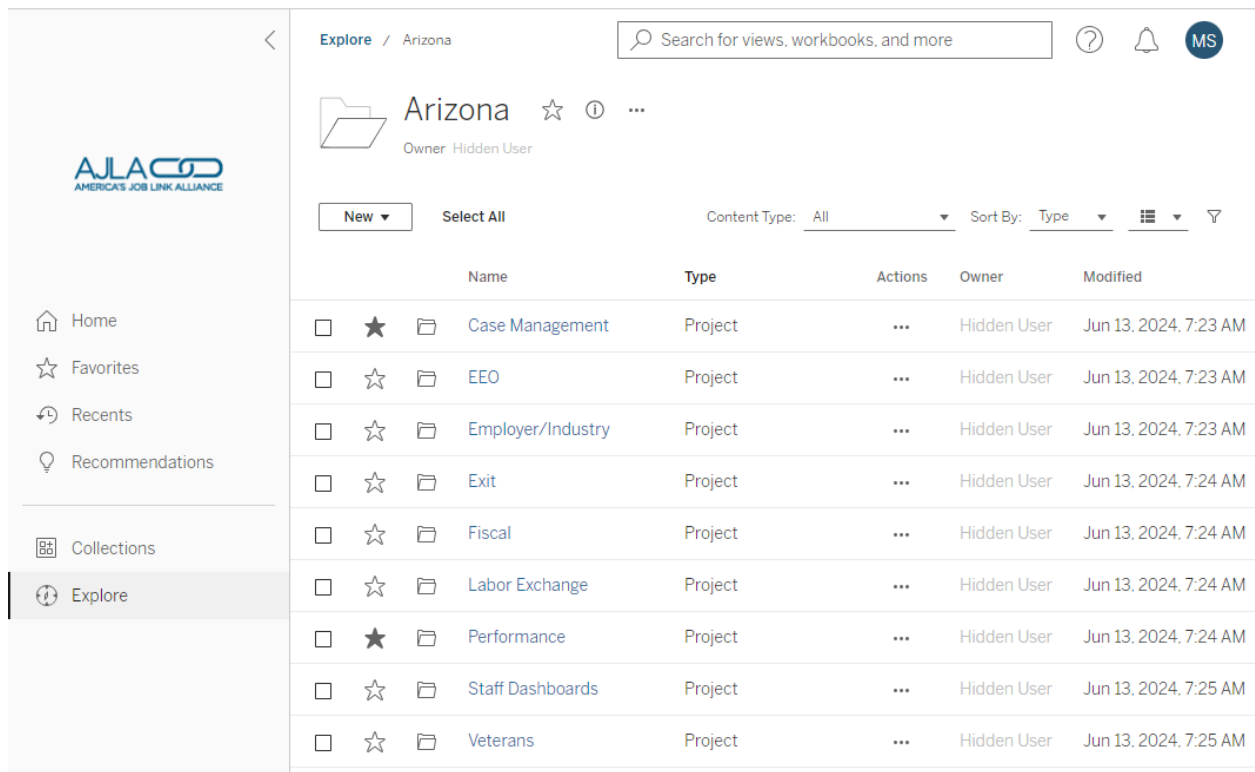
Here users will find all reports, grouped into folders, associated with AJC data. Notice the filled-in Star next to the Performance folder in the example screenshot above. This indicates a "favorite." To add a new favorite folder or report, simply click the star to highlight it. It will then appear on your Home screen under the Favorites category - as well as the Favorites section from the Navigation pane.
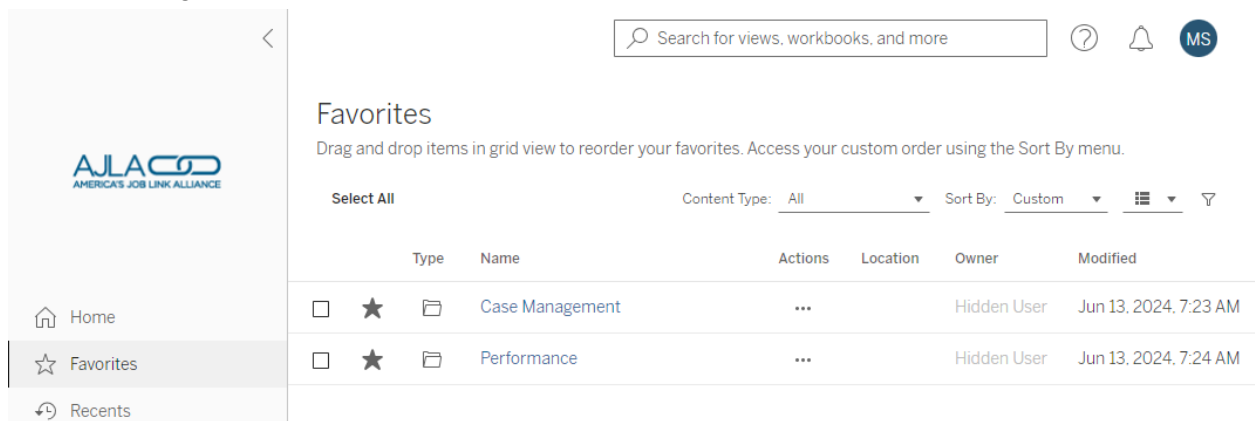
The search bar is a helpful way of navigating the system and locating reports or even specific data fields within reports. The system provides suggested results as you type.
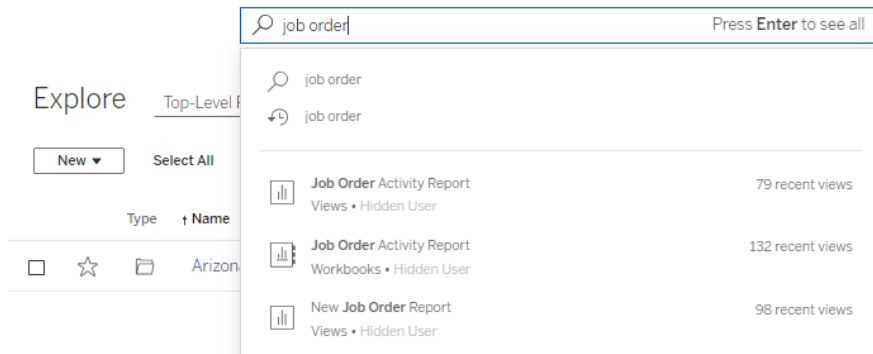

Press enter to see all results. Results can be filtered according to Content type, Modified date, and Tags.
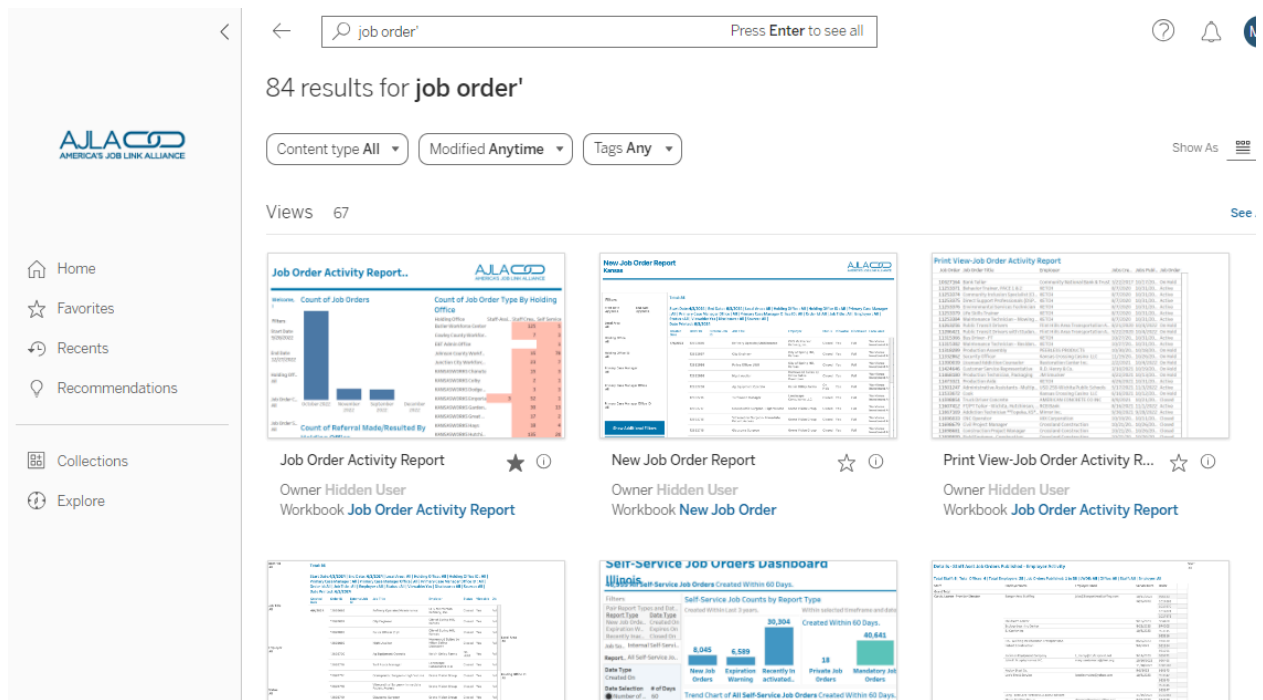
Report layout (General): Each report in Tableau is unique in its content and features, but most follow a similar basic structure. This section will cover the common items in reports, using the Enrollments Report (located in the Case Management folder) as an example.

The features described below are numbered to match the screenshot that precedes them.
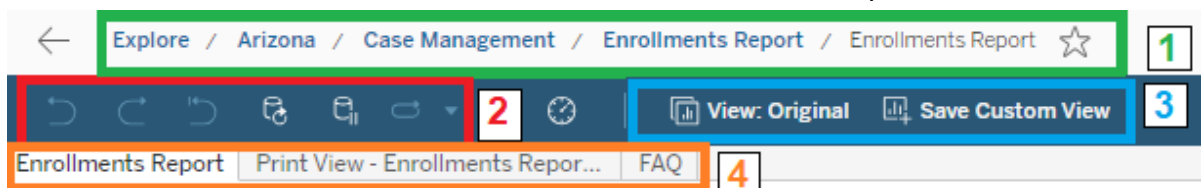
1. Pathway: Each report displays the pathway associated with it at the top of the screen. This is helpful in returning to a previous folder or for general navigation within the system.
2. Function menu:
   ○ : Undo last action
   ○ : Redo last action
   ○ : Reset View
   ○ : Refresh data
   ○ : Pause auto updates. When selected, this function will prevent the report from refreshing with every action. This is helpful when setting multiple filters.
      ■ : Resume auto updates. When ready to allow actions to take place, select the Resume button where the Pause button previously appeared.
3. Custom Views
   ○ View: Original: Select this function to switch to or manage custom views.

- Save Custom View: Select this function to save the current view.
    - Saving a view allows users to return to a report with the filters set the same way.

4. Report Views
   - Each report has default views that are accessible via the tabs just above the report title.
   - Print View: Most reports have a Print View, which displays the selected records in a format that is easy to print or export to a spreadsheet.
   - FAQ: Most reports have an FAQ tab, which contains helpful information about the report, its data source(s), and specifications
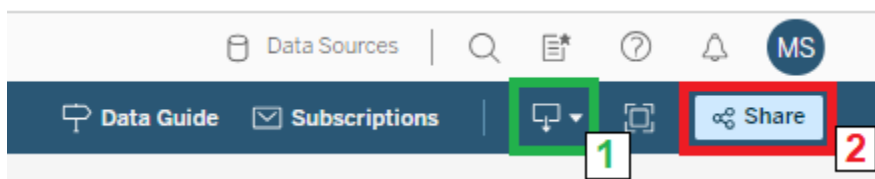
1. Export: Allows users to export the report or report data in various formats. Tip: If the "Data" option in the Export menu appears unavailable (see screen shot to the right), select any cell within the report data to highlight it, then select it again to remove the highlight. The Data export option should now appear available.
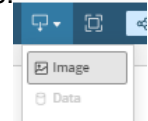
2. Share: Allows users to share the report via hyperlink. Individuals who receive the link will need to log into the system.

Filters are a critical component to any report in Tableau. They are covered in detail in the Report Customization and Filters section of this document.

1. Total Records and Distinct Count of Participants: A quick way to see how many records, duplicated or unique, exist within report filter parameters.
2. Report filter parameters: Displays the selections made in the Filters

System Customization

Tableau offers a variety of system customization options. Some examples of these features are outlined in this section.

- Favorites: As mentioned earlier in this document, folders and reports can be identified as "Favorites," by clicking the star icon next to their name.
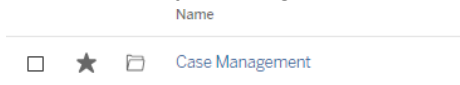
The star icon also appears in the report pathway at the top of any report view.
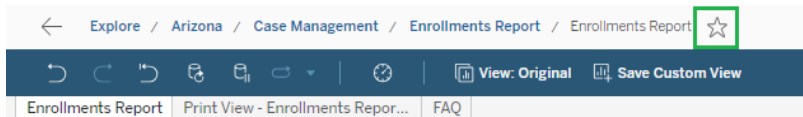
Identifying a folder or report is a great way of creating a shortcut to frequently used areas of the system. Selections will appear on the home screen and in the Favorites section.

- Collections: Collections are similar to Favorites, but allow for organizing into unique groups.
  - To create a Collection, select the Collections link in the Navigation pane, then select the "New Collection" button.
  - When the cursor hovers over the name of the Collection, an option to edit it appears to the right of the name.
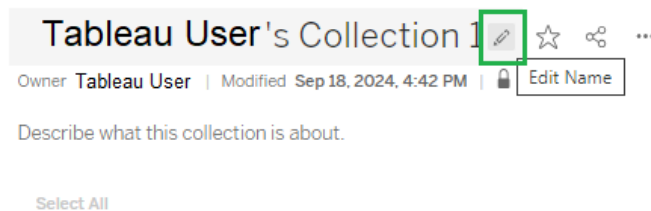
  - The same edit option appears when the cursor hovers over the "Describe what this collection is about." text.
  - In the example below, a Collection called, "Enrollment Trends" has been created.
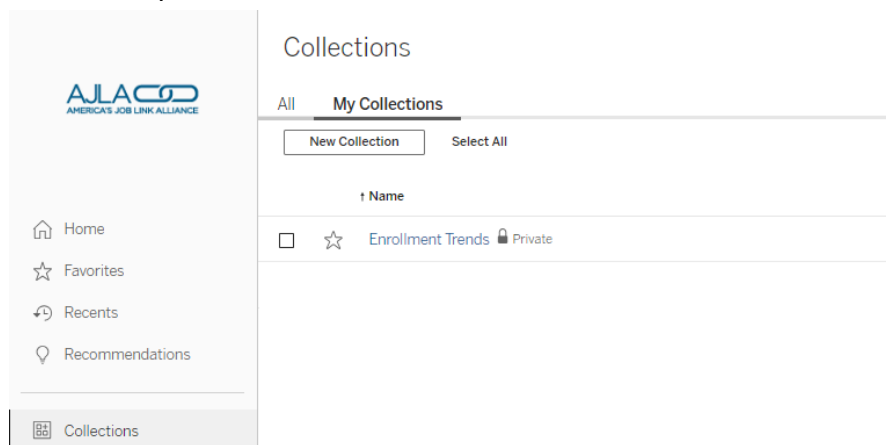
  - To add items to the collection, locate folders and/or reports using the Explore or search functions.

- In the example below, multiple items have been identified, and a checkmark has been placed in the check box to the left of their names. To add these items, select the Actions drop down near the top of the screen, then "Add to Collections".
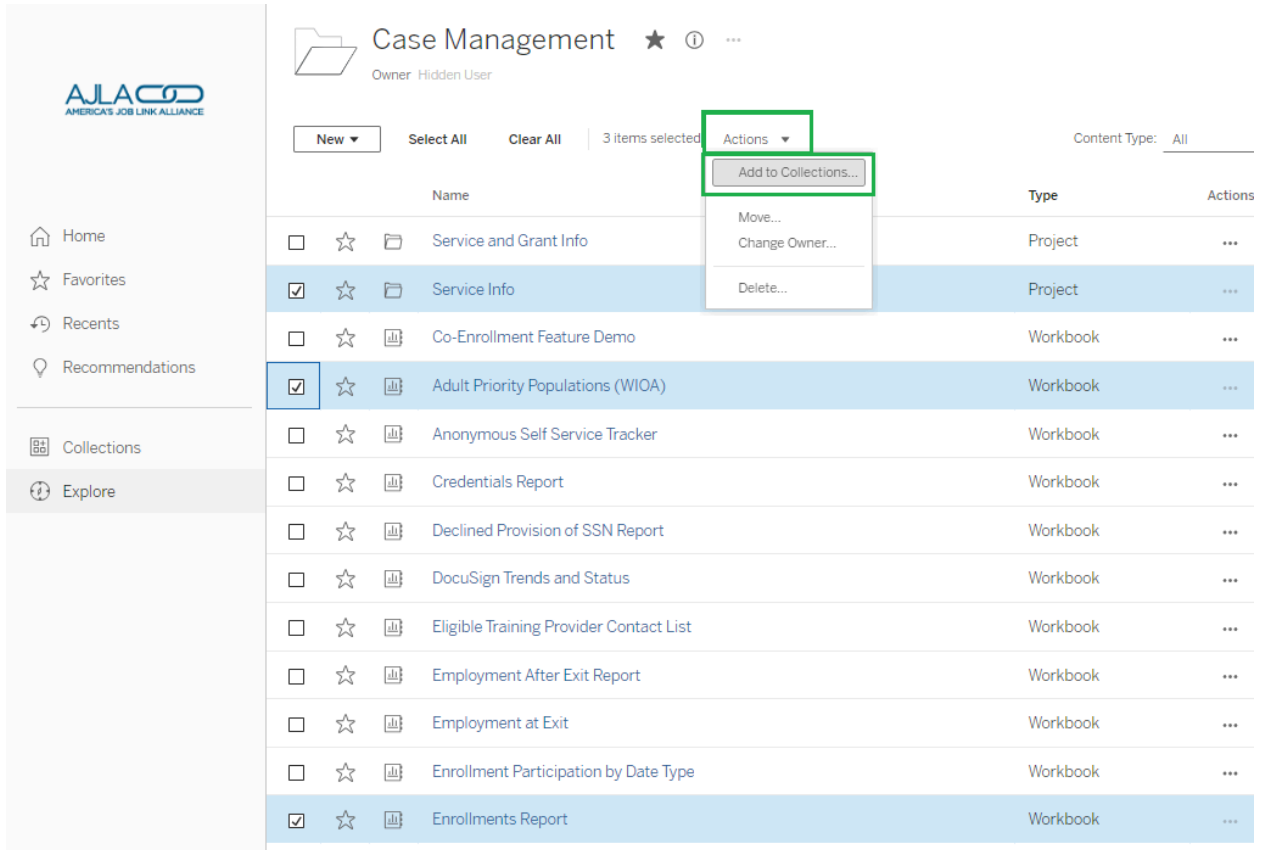
- In the dialog box that appears, locate your Collection and click the Add button. You can also create a new Collection from this screen by clicking the +New Collection button.
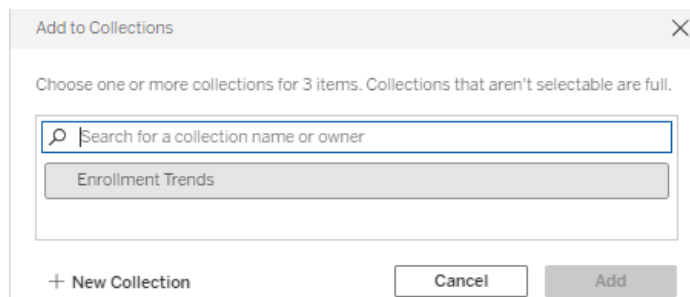
- The items will now appear in your Collection.

Enrollment Trends ☆ ⌁ …

Owner **Tableau User** | Modified Sep 18, 2024, 4:57 PM | 🔒 Private

Reports relating to Title IB program enrollments and associated data

Select All

		Type	Name
☐	☆	🗁	Service Info
☐	☆	⊞	Adult Priority Populations (WIOA)
☐	☆	⊞	Enrollments Report

Report Customization and Filters

The customization of reports using filters is a fundamental function of Tableau. This section provides instructions and definitions associated with this important feature of the system.

Reports and dashboards within the Tableau system can vary widely in terms of filter options. It is strongly recommended that users utilize the **FAQ** tab (located near the top of the report view), which will almost always include a "Filter Descriptions" section. All report content within Tableau is related to AJC data in some way, and the FAQ tab can help make the connection between the Tableau content and AJC data fields.

While filters and the options within them will vary, some common filters are:
- Date Type: Allows users to select the type of date range they would like to apply to the data.
  - Participant between: Records of individuals who have a program participation date on or prior to the date range, and an exit date during or after the date range (or have not exited).
  - Exited between: Records of individuals with a program exit date within the date range.
 - Enrolled between: Records of individuals with an enrollment start date within the date range
  - Enrolled after: Records of individuals with an enrollment start date on or after the date entered in the "Start Date" field in the Filter menu (Approved enrollments only)
  - Pending, Denied, Inactive, Exempt: Records of individuals with an enrollment status that corresponds with these selections
  - Currently Open: Records of individuals with an enrollment start date, and no program exit date at the time of the report's most recent data refresh (Approved enrollments only)
- Program: Corresponds with the Program Registration in AJC.
  - Examples include: Workforce Innovation and Opportunity Act, Employment Service, Reemployment Services
- Enrollment: Corresponds with the Program Enrollment in AJC.
  - Examples include: Adult, Dislocated Worker, Youth, Employment Service, RESEA
- Local Area: Local Workforce Development Areas
- Office: Offices aligned with AJC assignment
- Primary Case Manager: Individual assigned to the Program Enrollment in AJC
- Participant ID: AJC Participant ID (Unique identifier for every job seeker account in AJC)

Filtering Tips
- Use the "Pause Auto Updates" function before selecting multiple filters
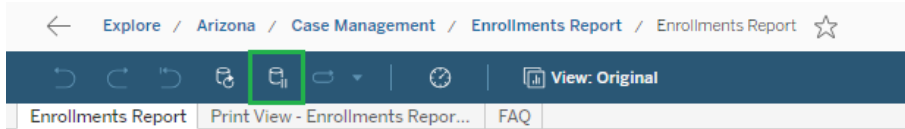
- ○ Many reports in Tableau are built using very large datasets and take time to load. If the Auto Updates are not paused, the report will refresh with each filter selection. Pausing while setting filters can save a significant amount of time.
  - ○ After filters are selected, click the Resume button where the Pause button previously appeared. The report will refresh with filters applied.
- Double-check filters
  - ○ It is a good practice to review filters for accuracy. When a report auto updates, filters will occasionally reset unintentionally. Users may encounter situations where a filter has reset to default and needs to be entered again.
- Create Custom Views for Repeated Use
  - ○ One very helpful way to increase efficiency in the Tableau system is to create Custom Views. The Save Custom View button appears after the report has been altered in some way from its default view.
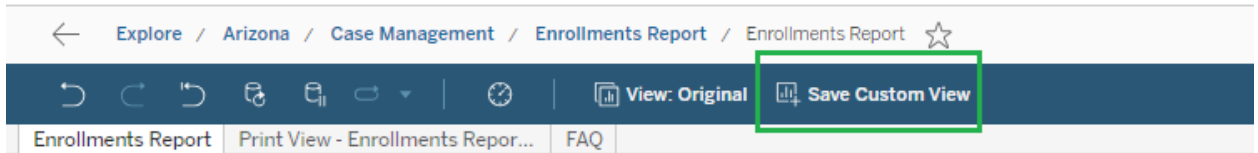
- ○ Example: Monthly new Youth Program enrollments at the ARIZONA@WORK Yuma County office, "CRC - Yuma"

- ○
  - ■ In the dialog box that opens, give the Custom View a name.
  - ■ Select "Make it my default" to see the report with these filters each time you open the report.

○ After saving, the report will refresh.
○ The "Enrollments Report" will now open with these filters set each time. In this example, the date range is saved for the month of July, 2024, and would need to be updated for subsequent months.

Performance Reports

Reports relating to the WIOA Performance Indicators and similar metrics can be found in the Performance folder.

The WIOA primary indicators of performance are defined, in detail, in Training and Employment Guidance Letter (TEGL) 10-16, Change 3. In Tableau, these indicators can be found in either the WIOA Annual or WIOA Quarterly reports, within the Performance folder. These report layouts were built in accordance with United States Department of Labor (DOL) specifications.

- WIOA Annual Reports

  - The default view of an Annual Report has the same Function and View menus at the top of the screen as other reports.
  - Views
    - WIOA Annual Report (...): Default view
    - Details: Displays records that exist within a given data field in the report.

Details - Dislocated Worker - WIOA Annual Report

Total Records: 519

Participant ID		Program ID	Enrollment ID	Participation Date DE 900	Exit Date DE 901	In Numerator	Case Manager	Employment Status	Employed 2nd Quarter After Exit 2*	Em
1385		7944604	7934654	20220622	Null	N/A	Byron Christopher	No		
7226		7760550	7750444	20220104	20220916	N/A	Byron Christopher	No	Employed, UI, WRIS & Supp wages	Inf
25536		8090293	8080575	20221116	Null	N/A	Iris George	No		
27263		8173719	8163968	20230203	Null	N/A	GRACE YETTA Askew	No		
36479		7757844	7747734	20220104	20230306	N/A	Ivonne Lucero	No	Information Not Yet Available	Inf
37799		6468774	6462653	20200916	20220916	N/A	Gregory Doyle	No	Employed, UI, WRIS & Supp wages	Inf
38429		7936350	7926395	20220627	Null	N/A	Noel Cantero	No		
40574		8227443	8217737	20230403	Null	N/A	Bonnie Santoyo	No		

Count Type: Training Services - Participa...
Case Manager:
Participant ID:
Job Seeker:
Program ID:
Enrollment ID:
In Numerator: N/A

- ● Note the filter menu on the right side of the Details page. This allows for quick filtering to view records within a given data field.
  - ■ Measurable Skill Gains: Lists the counts of individuals in each Measurable Skill Gain (MSG) type category.
  - ■ Details - Measurable Skill Gains: Individual records within each MSG type category
  - ■ Negotiated Performance: Displays the target levels of performance for each indicator, statewide and by local area for a given program year.
  - ■ FAQ - Descriptions of the report and its components
- ○ Filters

WIOA Annual Report (Dislocated Worker) Arizona

Filters

Program Year	LDWB	Office
2023	(All)	(All)

Participant & MSG Cohort Date: 07/01/2023 to 06/30/2024
Exiter Cohort Date: 04/01/2023 to 03/31/2024
Employment Rate Q2 & Median Earnings Cohort Date: 07/01/2022 to 06/30/2023
Employment Rate Q4 & Credential Attainment Cohort Date: 01/01/2022 to 12/31/2022

Measurable Skill Gains

FAQ

- ■ The filters on the default view appear first. Making a selection in the Program Year field will display associated cohort dates. The dates that are displayed in the "Employment Rate Q2 & Median Earnings" and "Employment Rate Q4 & Credential Attainment" cohorts are *Exit Dates* of participants. Individuals who exited during those time frames are included in the associated indicators.
- ■ LDWB: Local Workforce Development Board (LWDB) is mislabeled in the current version of the Annual report layout, but this filter allows users to display performance associated with individual local areas.
- ■ Office
- ○ Participant Characteristics: The Annual Reports contain participant characteristics and associated performance metrics for the following categories:

- Demographics
  - Sex
  - Age
  - Ethnicity & Race
- Employment Barriers
  - Performance Indicators

By Participant Characteristics

Negotiated Performance	Total Participants Served	Total Participants Exited	Employment Rate (Q2)	Employment Rate (Q4)	Median Earnings	Credential Rate	Measurable Skill Gains
Total Statewide - Numerator			519	534		260	305
Total Statewide - Denominator			663	724		368	389
Total Statewide	1,031	602	78.28%	73.76%	$10,133.78	70.65%	78.41%

- The WIOA Performance Indicator columns have a numerator and denominator for the rate-based metrics.
- One very useful Tableau function is the ability to "View Details" for any count in this report (and most other reports). This function will display all records that make up the selected count.
  - Example: Credential Rate denominator (all individuals impacting the Credential Attainment Rate indicator, positively or negatively)
    - Select the number in the Total Statewide - Denominator in the Credential Rate column, then hover the mouse over the selected cell.

Negotiated Performance	Total Participants Served	Total Participants Exited	Employment Rate (Q2)	Employment Rate (Q4)	Median Earnings	Credential Rate	Measurable Skill Gains
Total Statewide - Numerator			519	534		260	305
Total Statewide - Denominator			663	724		368	389
Total Statewide	1,031	602	78.28%	73.76%	$10,133.78		
Female - Numerator			271	270			

Total Credential Rate - Denominator: 368
View Detail

- Select View Detail in the dialog box
- The report will move to the Details View, displaying the 368 records (in this example) that make up this count.

WIOA Annual Report (Dislocat... | Details - Dislocated Worker - W... | Measurable Skill Gains - Disloc... | Details - Measurable Skill Gain... | Negotiated Performance | FAQ

Details - Dislocated Worker - WIOA Annual Report

Total Records: 368

Participant ID	Job Seeker	Program..	Enrollmen..	Participation..	Exit Date D..	In Numerat..	Case Manager	Employment ..	Employed 2nd Quarter After I
7226		7760550	7750444	20220104	20220916	Yes		No	Employed, UI, WRIS & Supp wa
8368		7712278	7783400	20211110	20220228	Yes		Employed	Employed, UI, WRIS & Supp wa
27861		7568115	7558060	20210712	20220107	Yes		No	Not Employed
37799		6468774	6462653	20200916	20220916	No		No	Employed, UI, WRIS & Supp wa
39262		7347653	7341653	20210210	20220201	Yes		No	Employed, UI, WRIS & Supp wa
70290		7612827	7602462	20210817	20220216	Yes		No	Employed, Non UI verification
89402		7558258	7548390	20210621	20220131	Yes		No	Not Employed

Count Type
Total Credential Rate - Deno...

Case Manager

Participant ID

Job Seeker

Program ID

Enrollment ID

In Numerator
(All)

- ○ The "Count Type" filter on the right side identifies the selected count
  - ○ The In Numerator column of the report identifies which participants are impacting performance positively (Yes) or negatively (No).
  - ○ There is also a filter for "In Numerator" if the user prefers to see only participants who are impacting positively or negatively.
- ■ The available tools within the WIOA Annual Report can assist Boards, providers, and program staff to:
  - ● Ensure accuracy in data quality
  - ● Monitor performance
  - ● Identify improvement opportunities
  - ● Identify disparities in equity of service
- ● WIOA Quarterly Reports
  - ○ Quarterly reports are built from the same source data as Annual reports, but have a different layout and allow users to view the data in different cohort periods.

WIOA Quarterly Report (Dislocated Worker) Arizona

Filters

Quarter	1 Qtr or 4 Rolling Qtr	LWDB	Office
September 30, 2024 ▼	Quarterly ▼	(All) ▼	(All) ▼

PY 2024 Q1 Performance Report
Participant, MSG & VPOS Cohort Date: 7/1/2024 - 9/30/2024
Exiter Cohort Date: 4/1/2024 - 6/30/2024
Employment Rate Q2 & Median Earnings Cohort Date: 7/1/2023 - 9/30/2023
Employment Rate Q4 & Credential Attainment Cohort Date: 1/1/2023 - 3/31/2023

FAQ

- ○ Filters
  - ■ Quarter: Identifies quarters by the last day of the quarter.
    - ● For example: Quarter 1 of Program Year 2024 (7/1/2024 - 9/30/2024) is identified as "September 30, 2024"
  - ■ 1 Qtr or 4 Rolling Qtr
    - ● Quarterly: Displays data associated with the single selected quarter
    - ● Rolling 4Q: Displays data associated with the selected quarter and three most recent quarters
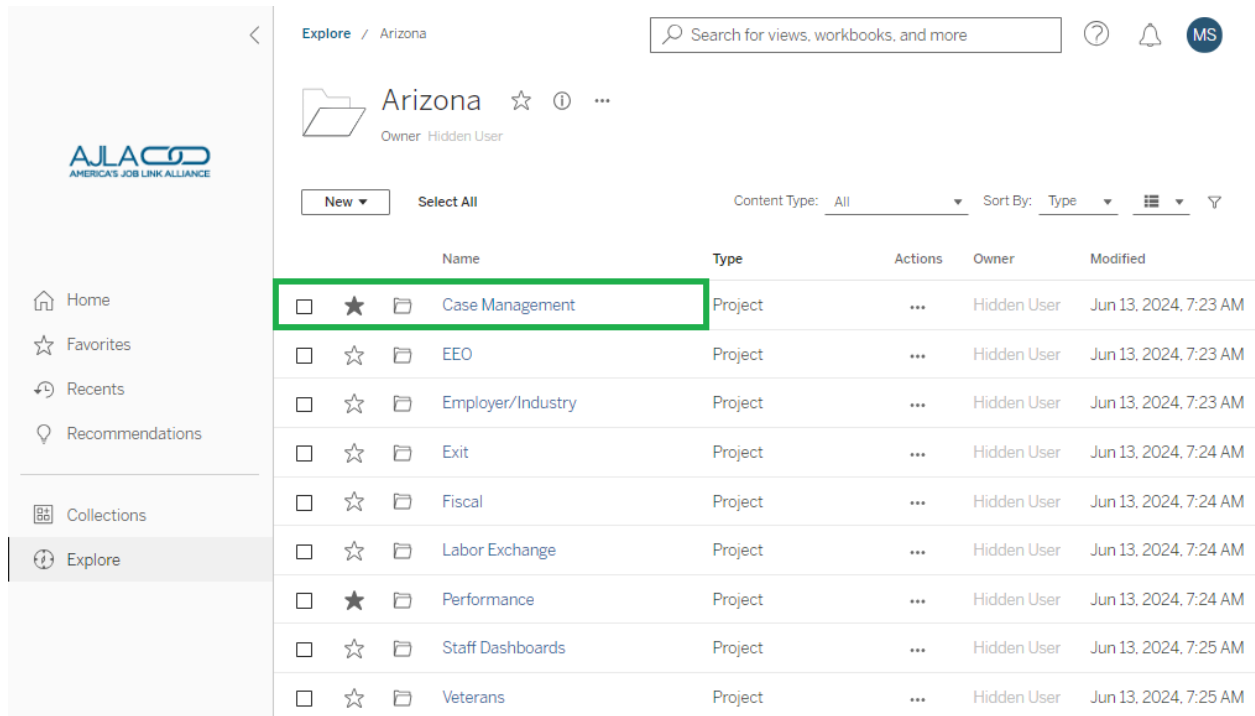 - ○ Service Categories

		Performance Items	Basic Career Service	Individualized Career Service	Training Service	Total Current Period
A. Summary Info		1. Total Exiters	55	234	271	560
		2. Total Participants	105	406	482	993

- ■ The Quarterly Report layout includes columns for distinct service category groups.
  - ● These groups are unduplicated, and sum to the "Total Current Period" column.
  - ● This feature can provide insights into performance outcomes among these groups. Performance indicators are located at the bottom of the table in the Quarterly layout.

		Performance Items	Basic Career Service	Individualized Career Service	Training Service	Total Current Period
A. Summary Info		1. Total Exiters	55	234	271	560
		2. Total Participants	105	406	482	993
D. Core Indicators of Performance	Negotiated Performance	1. Entered Employment Q2 - Numerator	19	269	392	680
		1. Entered Employment Q2 - Denominator	28	351	517	896
		1. Entered Employment Q2 - Rate	67.86%	76.64%	75.82%	75.89%
		2. Entered Employment Q4 - Numerator	15	261	431	707
		2. Entered Employment Q4 - Denominator	27	377	587	991
		2. Entered Employment Q4 - Rate	55.56%	69.23%	73.42%	71.34%
		3. Median Earnings	$9,711.60	$8,433.11	$9,956.12	$9,099.12
		4. Credential Rate - Numerator			403	403
		4. Credential Rate - Denominator			561	561
		4. Credential - Rate			71.84%	71.84%
		5. Measurable Skill Gains - Numerator		0	326	326
		5. Measurable Skill Gains - Denominator		0	396	396
		5. Measurable Skill Gains - Rate			82.32%	82.32%

Case Management Reports
Case management reports contain a wide variety of individual-level data across the programs that utilize AJC. Client demographics, services received, dates of enrollment and participation, status and outcomes are examples of the type of data that populate these reports.
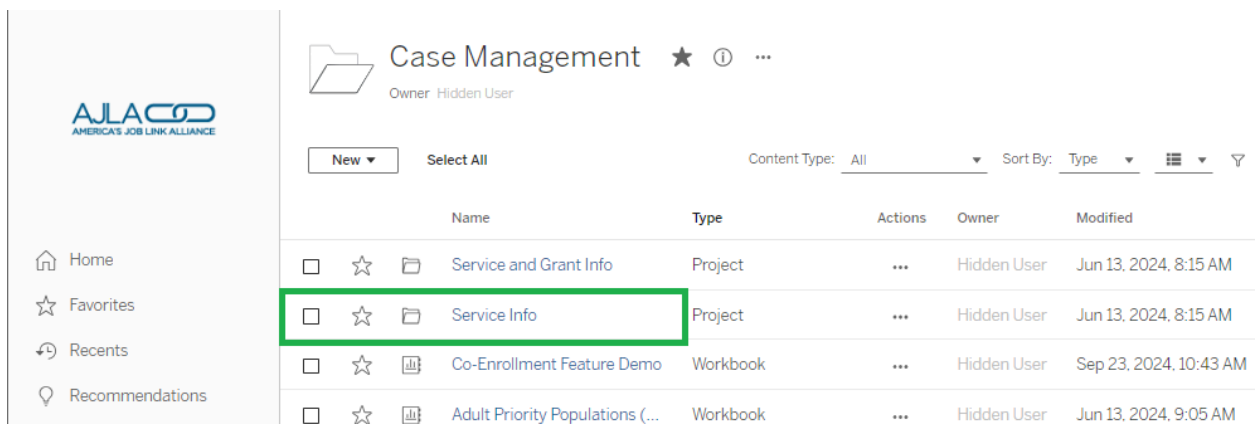

A selection of the reports in the Case Management folder:
- Service Info

- ○ The Service Info reports contain the most comprehensive view of services delivered to job seekers by programs utilizing AJC. Some examples of questions one might answer using Service Info reports are:
  - How many participants successfully completed Healthcare training last month?
  - Did our office achieve our quarterly target for Job Referrals?

- Which training provider was most utilized in our local area by WIOA Youth participants last year?
  - The Service Info folder contains individual reports for each program registration in AJC.

  - In addition to the standard upper actions menu and left-side filter menu, the default view of a Service Info report functions like a dashboard, providing quick references to counts of services by Enrollment Name, by Service Name, Service Status, and Service Start Date.

- ○ The "Show Additional Filters" button in the filter menu allows for additional customization.
- ○ When selected, a new menu appears with options to filter by:
  - ■ Service
  - ■ Service Status
  - ■ Service Provider
  - ■ CIP: Classification of Instructional Programs - for educational or training services
  - ■ O*NET: Standard Occupational Classification codes - for training or work-based learning services
  - ■ Participant Group: AJC allows users to create custom participant groups, which can then be used to filter Service data to view only services delivered to individuals within those groups
  - ■ Training Program Name
  - ■ Training Program ID
  - ■ Has an ITA (Individual Training Account)
- ○ The Print View tab (near the top of the screen), like with other reports previously mentioned in this document, allows users to export or print the filtered data in a spreadsheet format.
- ● Enrollments Report: Participant-level data for all job seeker enrollments in AJC.
  - ○ Examples of questions this report can help answer:
    - ■ How many Adults were enrolled at our office last quarter? (or Dislocated Workers, Youth, Employment Service, etc.)
    - ■ How many veterans exited in our local area last quarter?
- ● Job Seeker Demographics: Participant-level demographic data for all job seekers in AJC.
  - ○ Columns include:
    - ■ Email Address
    - ■ Residential address
    - ■ DOB and age
    - ■ Sex
    - ■ Disability status
    - ■ Race and ethnicity
    - ■ Single parent
    - ■ Limited English and Primary language
    - ■ Citizenship status
    - ■ School Status
    - ■ Employment Status
    - ■ Veteran Status
  - ○ Examples of questions this report can help answer:
    - ■ How many disabled veterans were served by the Employment Service program last year?
    - ■ What are the email addresses for all spanish-speaking program participants living in Pima county?

- Adult Priority Populations: Participant-level data for job seekers enrolled in the WIOA Adult program, who are basic skills deficient, low-income, or public assistance recipients at the time of program entry.
    - Examples of questions this report can help answer:
        - What proportion of our current Adult program participants are considered Basic Skills Deficient?
        - How many Public Assistance Recipients were served in the Adult program at our office last month?
- Last Contact Report: Displays the most recent "contact" data associated with job seekers, based on the "Contact Method" field in case notes. Also includes contact information.
- Last Notes Report: Displays the most recent case note data associated with job seekers.
- Measurable Skill Gains: Participant-level data for WIOA program participants who are included in the Measurable Skill Gains (MSG) performance indicator.
    - This report is useful in identifying potential issues with MSG data entry.
    - The report includes a column for "Diploma or Equivalent Attained," because this particular MSG type requires data entry in the AJC Outcomes tab, rather than the MSG section. The column in this report helps by identifying individuals who may have attained their diploma or GED but the necessary data entry has not yet been completed.
- Exit Status (Youth School Status): Participant-level data from the Exit Questions in AJC Program Details, including:
    - Other Reasons for Exit (Exclusionary Exits)
    - School Status at Exit: This field is a required data element for Youth Program reporting. This report can be used to monitor and ensure completion of its data entry.

Exit Reports

There are two reports currently available in the "Exit Reports" folder in Tableau.

- Exit Warning: This report contains participant-level data for open enrollments, for which all service end dates or estimated end dates are in the past.
  - This information is helpful in identifying cases that will exit if 90 days pass without a service being delivered.
  - The filter menu for this report has sliders for date ranges, but users can type days and dates manually, as well, by clicking on the number of days or date.

- Recently Exited: This report contains participant-level data for enrollments which have exited, meaning at least 90 days have passed since their last service.
  - This information is helpful in identifying cases which may be due for - or benefit from - follow-up services

Employer/Industry Reports

Data associated with services delivered to employers in AJC can be found in the Employer/Industry folder.

- Employer Activity: Provides the total counts of employer contacts, staff-assisted job orders entered and published, and job development. Data can be filtered by local area, office and staff, as well as service date. Users can select a count to display employer-level record data.
- Employer Contact Tracking: Provides data associated with the Contact Tracking and Case Notes sections of AJC Employer Details.
- Employer Last Contact Report: Displays days since last contact, according to Employer Details Contact Tracking and case notes.
- Employer Lookup by Distance from Office
- Employer Service Management Report: Comprehensive report containing employer service data.
  - Includes both self service and staff-assisted employers
  - Can be used to monitor and manage staff contacts and services to employers
- Jobs and Jobseeker Dashboard: Interactive dashboard providing visual tools to identify active jobs in AJC, along with job seeker resume and job viewing activity.
- ONET Dashboard - Arizona: Interactive report providing information about the most commonly posted jobs by O*NET (Occupational) Code.
- Open Jobs by Employers
- Registered Apprenticeship: Dashboard and report providing information on Registered Apprenticeships at the statewide, local area, and county levels.
- State Employer (Micro 202) Lookup: Tool to search for employers in the state tax database, not limited to those with accounts in AJC.
- Tagged Employers:Displays employer-level data for records with "tags" associated in AJC and the ability to filter by those tags. Examples of tags include:
  - In-Demand Industry
  - Background Friendly
  - Actively Recruiting People who have a Disability
  - Have Telework Opportunities