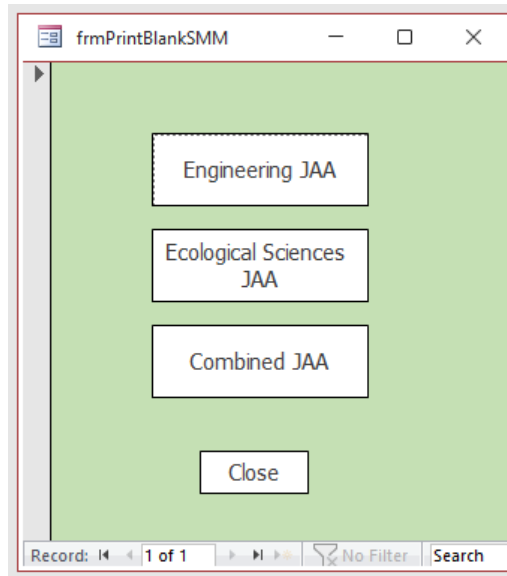


Generating Reports with the IA Job Approval Authority Database

Print Latest Skills Matrix Master

Overview: Get a print preview of a blank version of a JAA chart.

1. Choose which type of JAA chart you want to view: Engineering, Ecological Sciences, or Combined and click on the corresponding button.
2. Click Close to go back to the Main Menu.



Create a Report For an Individual

Overview: Generate a JAA report for one individual.

Basic Process

1. Enter the name of the individual you wish to generate a report for.
2. Make selections to narrow down the amount of data returned in report.
3. Click View Report.

JAA that has not been approved by either an Area Engineer or an Area Resource Conservationist will be displayed in red.

Full Chart

1. Enter the name of the individual you wish to generate a report for.
2. If you specifically want an Engineering JAA Chart or an Eco Sci JAA Chart, select either *CED* (Engineering) or *ESD* (Eco Sci) under *Discipline Category*. If you want a Combined JAA Chart, leave Discipline Category blank.
3. Check the box next to *All Practices*: This will show results for all practices and controlling factors regardless of whether the individual has JAA in them.
4. Click **View Report**.

NOTE: Do not make selections other than Name and Discipline Category in conjunction with the All Practices box. Adding any other selections will result in an error message.

The screenshot shows a web form titled "Filter Data for an Individual Report". The form has a blue header and a white body. It contains several input fields and checkboxes. Numbered callouts are placed over the form:

- 1**: Points to the "Name" dropdown menu, which currently shows "User, Test".
- 2**: Points to the "Discipline Category" dropdown menu, which currently shows "CED: Engineering".
- 3**: Points to the "All Practices" checkbox, which is checked.
- 4**: Points to the "View Report" button.

Other visible elements include: "Updated: 6/20/2023", "Lead Discipline SubCategory:", "Practice Code:", "Practice Name:", "Practice Last Updated (Date):", "Max Approval Authority", "Inventory and Evaluation/ Planning:", "Design/ Development:", "Construction/ Installation/ Certification:", "All Controlling Factors:", "Concurred By:", "Concurred By Title:", "Concurred By Date:", "Determined By:", "Determined By Date:", "Return to Main Menu", "Reset Form", "Help", and a status bar at the bottom showing "Record: 14 1 of 1".

Full charts are formatted roughly in alphabetical order with connected practices grouped together. A black line denotes a new practice/group of connected practices. Connected Controlling Factors are denoted by sharing a background color. JAA that has not been approved by either an Area Engineer or an Area Resource Conservationist will be displayed in red.

Report for One Practice

1. Enter the name of the individual you wish to generate a report for.
2. Enter or select either the *Practice Code* or *Practice Name* that you wish to base the report on.
3. If there are *Controlling Factors* for that Practice, do one of the following:
 - a. Select the desired *Controlling Factor*
 - b. OR Leave *Controlling Factor* blank: This will show results for every controlling factor the individual has JAA in
 - c. OR Check the box next to *All Controlling Factors*: This will show results for every controlling factor regardless of whether the individual has JAA in it.
4. Click View Report.

The screenshot shows a web form titled "Filter Data for an Individual Report" with the subtitle "Select a name, continue making one or more selections to narrow amount of data returned in report".

Numbered callouts on the form:

- 1**: Points to the "Name" field, which contains "User, Test".
- 2**: Points to the "Practice Code" field, which contains "000".
- 3**: Points to the "All Controlling Factors" checkbox, which is checked.
- 4**: Points to the "View Report" button.

Other visible fields and options include:

- "Discipline Category" dropdown (CED: Engineering, ESD: Ecological Sciences).
- "Updated" date field (6/20/2023).
- "Practice Name" dropdown (Any practice).
- "Practice Last Updated (Date)" dropdown.
- "Select Controlling Factor" dropdown.
- "Max Approval Authority" section with checkboxes for "Inventory and Evaluation/ Planning", "Design/ Development", and "Construction/ Installation/ Certification".
- "Concurred By" section with dropdowns for "Concurred By Title" and "Concurred By Date", and checkboxes for "Concurred By is populated" and "Concurred By field is blank".
- "Determined By" section with dropdowns for "Determined By Title" and "Determined By Date", and checkboxes for "Determined By is populated" and "Determined By field is blank".
- Buttons at the bottom: "Return to Main Menu", "Reset Form", "View Report", and "Help".

JAA that has not been approved by either an Area Engineer or an Area Resource Conservationist will be displayed in red.

Other Selection Criteria

- A. **No Selections:** Click View Report without making any selections to generate a report that displays all practices that the individual has JAA in. Any practices the individual does not have JAA in will not be displayed.
- B. **Discipline Category:** Select a *Discipline Category* (CED-Engineering or ESD-Eco Sci) from the corresponding drop-down list to specify which to get results for.
- C. **Lead Discipline SubCategory:** Select a *Lead Discipline Subcategory* from the corresponding drop-down list to specify which to get results for.
- D. **Practice Last Updated:** Next to *Practice Last Updated*, choose <, >, =, ≤, or ≥ in the left drop-down list and enter the desired date in the right box to specify the timeframe the practice(s) were last updated.
- E. **Max Approval Authority:** Next to *Max Approval Authority*, choose <, >, =, ≤, or ≥ in one or more of the left drop-down lists and input the desired Job Class level (numerically) in one or more of the right *Max Approval Authority* boxes to specify the Approval Authority value. This can be done for one or more of the following categories: *Inventory and Evaluation/Planning*, *Design/Development*, or *Construction/Installation/Certification*.
- F. **Concurred:**
 - **Concurred By:** Select a name from the *Concurred By* drop-down list to specify who concurred the JAA.
 - **Concurred By Title:** Select a job title from the *Concurred By Title* drop-down list to specify the job title of who concurred the JAA.
 - **Concurred By Date:** Next to *Concurred By Date*, choose <, >, =, ≤, or ≥ in the left drop-down list and input the desired date in the right box to specify when the JAA was concurred.
 - **Concurred populated:** Check the box next to *Concurred By is populated* to narrow down results to only JAA that has been concurred.
 - **Concurred blank:** Check the box next to *Concurred By field is blank* to narrow down results to only JAA that has not been concurred.

NOTE: Because an individual's entire chart is concurred all at once, if the individual's JAA has not been edited since it was last concurred, the utility of these selection criteria will be limited.

- G. **Determined:**
 - **Determined By:** Select a name in the *Determined By* box to specify who determined the JAA.
 - **Determined By Date:** Next to *Determined By Date*, choose <, >, =, ≤, or ≥ in the left drop-down list and input the desired date in the right box to specify when the JAA was determined.
 - **Determined populated:** Check the box next to *Determined By is populated* to narrow down results to only JAA that has been determined.
 - **Determined blank:** Check the box next to *Determined By field is blank* to narrow down results to only JAA that has not been determined.

Selection Criteria can be mixed and matched to get the desired results.

Make Selections to Create a Report for an Individual

Filter Data for an Individual Report

Select a name, continue making one or more selections to narrow amount of data returned in report

Name: User, Test **Discipline Category:** CED: Engineering
ESD: Ecological Sciences

Updated: 6/20/2023 **Lead Discipline SubCategory:**

Practice Code: **Practice Name:**

D **Practice Last Updated (Date):**

E **Max Approval Authority**

Inventory and Evaluation/ Planning: ☐ ☐
Design/ Development: ☐ ☐
Construction/ Installation/ Certification: ☐ ☐

All Controlling Factors: ☐
All Practices: ☐

F **Concurred By:** ☐ ☐
Concurred By Title: ☐ ☐
Concurred By Date: ☐ ☐

OR, Specifically ☐ Concurred By is populated **OR, Specifically** ☐ Concurred By field is blank

G **Determined By:** ☐ ☐
Determined By Date: ☐ ☐

OR, Specifically ☐ Determined By is populated **OR, Specifically** ☐ Determined By field is blank

Return to Main Menu **Reset Form** **View Report** **Help**

Record: 14 1 of 1 No Filter Search

Other Buttons:

Return to Main Menu: Closes the window and opens the Main Menu.

Reset Form: Removes all selections made.

Help: Provides additional notes and helpful tips.

Create a Report

Overview: Generate a JAA report for a group of people.

Basic Process

1. Select whether you want to sort by *Employee Name* or *Practice* in the *Sort By* section.
2. Make selections to narrow down the amount of data returned in report.
3. Click View Report.

JAA that has not been approved by either an Area Engineer or an Area Resource Conservationist will be displayed in red.

Sort By:

- **Employee Name:** Groups JAA by employee. Result will look like a list of practices grouped by employee with page breaks in between. Works well for a long list of practices or a single practice with many controlling factors.
- **Practice:** Groups JAA by practice. Result will look like a list of employees grouped by practice/controlling factor with page breaks in between. Works well for long lists of people.
NOTE: At the end of each list, it will say how many people with EJAA are on it.

Selection Criteria

- A. **Area:** Select an *Area* from the corresponding drop-down list to specify which to get results for.
- B. **Team:** Select a *Team* from the corresponding drop-down list to specify which to get results for.
NOTE: the teams listed in the drop-down list are specific to the area selected. If no area is selected, there will be no teams to choose from.
- C. **Location:** Select a *Location* from the corresponding drop-down list to specify which to get results for. NOTE: the locations listed in the drop-down list are specific to the team selected. If no team (and by extension, no area) is selected, there will be no locations to choose from.
- D. **Affiliation:** Select an *Affiliation* (ie *NRCS*, *IDALS*, *SWCD*, *IDNR*, etc.) from the corresponding drop-down list to specify which to get results for.
- E. **Lead Discipline Category:** Select a *Lead Discipline Category* (*CED-Engineering* or *ESD-Eco Sci*) from the corresponding drop-down list to specify which to get results for.
- F. **Lead Discipline SubCategory:** Select a *Lead Discipline Subcategory* from the corresponding drop-down list to specify which to get results for.
- G. **Skill Matrix Last Updated:** Next to *Skill Matrix Last Updated*, choose $<$, $>$, $=$, $\leq$, or $\geq$ in the left drop-down list and enter the desired date in the right box to specify the timeframe the JAA chart was last updated.
- H. **Practice Code/Name:** Select or enter either the *Practice Code* or the *Practice Name* in their respective drop-down lists to specify which practice to get results for.
 - **Controlling Factors:** If there are Controlling Factors for the selected practice, do one of the following:
 - Select the desired *Controlling Factor*
 - OR Leave Controlling Factor blank: This will show results for every controlling factor the resulting employees have JAA in
 - OR Check the box next to *All Controlling Factors*: This will show results for every controlling factor regardless of whether the resulting employees have JAA in it.

- I. **Practice Last Updated:** Next to *Practice Last Updated*, choose <, >, =, ≤, or ≥ in the left drop-down list and enter the desired date in the right box to specify the timeframe the practice(s) were last updated.
- J. **Max Approval Authority:** Next to *Max Approval Authority*, choose <, >, =, ≤, or ≥ in one or more of the left drop-down lists and input the desired Job Class level (numerically) in one or more of the right *Max Approval Authority* boxes to specify the Approval Authority value. This can be done for one or more of the following categories: *Inventory and Evaluation/Planning*, *Design/Development*, or *Construction/Installation/Certification*.
- K. **Concurred:**
- **Concurred By:** Select a name from the *Concurred By* drop-down list to specify who concurred the JAA.
 - **Concurred By Title:** Select a job title from the *Concurred By Title* drop-down list to specify the job title of who concurred the JAA.
 - **Concurred By Date:** Next to *Concurred By Date*, choose <, >, =, ≤, or ≥ in the left drop-down list and input the desired date in the right box to specify when the JAA was concurred.
 - **Concurred populated:** Check the box next to *Concurred By is populated* to narrow down results to only JAA that has been concurred.
 - **Concurred blank:** Check the box next to *Concurred By field is blank* to narrow down results to only JAA that has not been concurred.
- L. **Determined:**
- **Determined By:** Select a name in the *Determined By* box to specify who determined the JAA.
 - **Determined By Date:** Next to *Determined By Date*, choose <, >, =, ≤, or ≥ in the left drop-down list and input the desired date in the right box to specify when the JAA was determined.
 - **Determined populated:** Check the box next to *Determined By is populated* to narrow down results to only JAA that has been determined.
 - **Determined blank:** Check the box next to *Determined By field is blank* to narrow down results to only JAA that has not been determined.

Selection Criteria can be mixed and matched to get the desired results.

Make Selections to Create a Report

Filter Data for Report

Make one or more selections in order to narrow amount of data returned in report

Area: **A** Lead Discipline Category: CED: Engineering **E**
 Team: Lead Discipline SubCategory: **F**
 Location: **C** Sort By: ☒ Employee Name
 Affiliation: ☐ Practice
 Skills Matrix Last Updated by Individual (Date): All Controlling Factors: ☐

Practice Code: Practice Name: **H**
 Practice Last Updated (Date): **I**

J **Max Approval Authority** Inventory and Evaluation/ Planning:
 Design/ Development:
 Construction/ Installation/ Certification:

K Concurrred By: **OR, Specifically** ☐ Concurrred By is populated **OR, Specifically** ☐ Concurrred By field is blank
 Concurrred By Title:
 Concurrred By Date:

L Determined By: **OR, Specifically** ☐ Determined By is populated **OR, Specifically** ☐ Determined By field is blank
 Determined By Date:

Return to Main Menu Reset Form **View Report** Help

Record: 14 1 of 1 No Filter Search

Other Buttons:

Return to Main Menu: Closes the window and opens the Main Menu.

Reset Form: Removes all selections made.

Help: Provides additional notes and helpful tips.