

Qlik Re-Platform Release Summary

On Request Reports

On Request Reports Re-platform Release Summary Contents

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1. Report Filters Sheet

Below are the standards set for the Report Filters sheet of the Qlik on Request reports

1. Location of sheet
 - a. The Report Filters sheet will be the very first sheet in the App
2. Naming conventions
 - a. Sheet name is "Report Filters"
 - b. Button names are "Reset" and "Generate Results"
 - c. Filter headers should match the source filter name, except for Organizational Name → "Division". This is inconsistent in the source systems and will be standardized to "Department" in Qlik
3. "Data as of:" KPI
 - a. **Location:** top left corner
 - b. This is last reload time and may not match source
4. Filters
 - a. **Location & size:** data covering the entire space, i.e. columns need to be pulled till the end of sheet, filter values should be aligned to the left
 - b. Filters should include all options available on the source front-end
 - c. Dates
 - i. **Location:** right side of sheet
 - ii. Filter panes outside of the container are to be used
 1. Most recent month/day should be at the top of the list
 - iii. The Qlik date picker will not be used to display dates as the user flow and UI is confusing to users and there is no option to search for dates.
 - d. Containers
 - i. Containers are used when there are multiple views in the front-end application
 - ii. Icon is displayed for each filter pane
 - iii. Example Containers:
 1. Office: Office ID, Office Name, Office type
 2. Unit: Unit Type, Unit ID, Division
 3. Worker: Name, Worker id, classification title, employee number
 - e. **Order:** (this ordering accounts for most but not all possible filters)
 - i. 1. General Container
 - County, Region, District, Department, WTW Office, Program
 2. Office Container
 - Office ID, Office Name, Office type
 3. Unit Container
 - Unit Type, Unit ID
 4. Worker Container
 - Name, Worker id, classification title, employee number
 - f. filters that need to be selected for the report to properly generate will include a * in the filter name. (ex. 'County *')
5. Buttons

- a. "Reset"
 - i. **Location:** bottom left, **Behavior:** clear the filters
- b. "Generate Results"
 - i. **Location:** Bottom right
 - ii. **Behavior:** When not all mandatory selections have been made, the button will display "Please Select Required Fields *" and the button will not be clickable. When all the mandatory fields are selected, the button will display "Generate Results" when clicked it will navigate the user to the next sheet

2. Summary and Detail Sheets

1. Location
 - a. These sheets are to come after the "Report Filter" sheet in the order of what is in the source report template.
2. Header Row
 - a. "Return to Selections" Button
 - i. Behavior: Navigate to "Report Filters" sheet, clear selections
 - b. "Data Extracted Daily As Of:"
 - i. Displays most recent time of data extraction
 - c. "County:"
 - i. Displays County name
 - d. "User:"
 - i. Displays user who generated the report
 - e. **Order:** "Return to Selections", "Data Extracted Daily As Of:", "County:", "User:"
3. Navigation Buttons
 - a. **Location:** below the header row starting from the left side
 - b. **Order:** should match sheet order on source report
 - c. **Behavior:** navigate to sheet
 - d. **Size:** Each button will be of equal size
4. Overall look and feel should be as in the below screenshot

The screenshot shows the CalSAWS Program Summary interface. At the top, there are four buttons: "Return to Selections", "Data extracted daily as of: 03/18/2021", "County: Los Angeles", and "User: woodn". Below these are two more buttons: "Worker Summary" and "Worker and Program Details". The main content is a table titled "Program Summary" with the following data:

Program	Carried Forward	New	Restored	Approved	Denied	Cancelled/Withdrawn	Pending
Totals	14694393	9588013	127481	4396864	2812447	185361	6819688
AAP	65835	8897	732	7248	314	1	23021
Adult Protective Services	0	0	0	2	0	0	0
Cal-Learn	31418	1666	0	5329	0	0	23979
CalFresh	3422467	3799836	0	1682219	629283	92562	1291124
CalWORKs	960461	622654	115893	185926	284778	34895	312148
CAPL	39405	14841	782	5815	5243	619	12754
CFET	58458	0	0	0	582	0	66612
Child Care	386988	63072	0	35537	33851	4	168451
Child Protective Services	284592	0	0	133455	17	0	0

3.Data Formatting and Alignment

1. Data Formatting
 - a. The suggested date format is "MM/DD/YYYY" for daily values and "MM/YYYY" for monthly.

2. Data Alignment

- a. Qlik Auto alignment is used for on request reports. Auto Alignment aligns text values on the left, and number/date values on the right. When there is no data in the report, Qlik cannot tell what the data type of the column is and will align column headers on the right side.

4. Sheet Formatting

1. CALSAWS logo will be displayed on the top left of each sheet
2. No redundancy in the Buttons, Labels or KPI's used
3. Source sheet names like "sheet1", "sheet2" are suggested to be updated to have a relevant name

5. Expected Mismatches

1. Report filters
 - a. The values of the filters may not match what is seen in LRS
 - i. This is because there is both c-iv and LRS data in Qlik
 - ii. In Qlik, once some selections have been made other selections may be greyed out, this is because that combination of selections does not exist in the data
 - b. Primary and Secondary sort will not be included in Qlik as the user can directly sort in the tables
2. Null values appear as '-' (not blank spaces "").
3. Zeros will appear as zeros (not blank spaces).
4. Exports cannot exceed 1Million records as this is an excel limitation
5. Excel Export would be non-formatted, and users need to manually create multiple excel sheets as needed
6. Qlik has a natural sort order which may cause a sort difference from source
7. Some Qlik tables will include a "Qlik ID" column, this column is added to reports so duplicate records are displayed properly
8. Null values (-) are unable to be filtered on in Qlik table objects

6. On Request Qlik Behavior

1. Dynamic Views

1. The user needs to make one request and wait for the dynamic view to load before a new selection can be made. If a new selection is made before the first one is done loading the following error will occur "An existing request is in progress, please wait for it to finish". To resolve this error, please wait for the first request to finish and the error will resolve itself.
2. If there are multiple sheets in a report, each sheet will reload when the user navigates to that sheet. For example, A user selects and clicks the "Generate Results" button, they are navigated to the next sheet, the summary sheet, and the dynamic views load. The user then navigates to the Details sheet, again the dynamic views will need to load.
3. Exporting data in excel is possible through right click table > Download as> Data. However, the exported Excel would not have formatting and each table will need to be exported independently, the export limit is 1,000,000 rows per Excel limitation.

2. Sorting

1. Once a table is generated, apply a sort by clicking the column header, one click will sort the values in ascending order and two clicks will sort the values by descending order. Qlik will display an arrow to indicate if a sort is ascending or descending.

An Up Arrow Indicates ascending order:

IHSS App Date	Q	Days Elapsed Since IHSS App Date	Q	Referral Date	Q
01/26/2015		2,341		03/23/2017	
04/15/2015		2,262		02/24/2017	
09/26/2016		1,732		09/26/2016	
12/09/2016		1,658		03/09/2017	
02/09/2017		1,596		02/09/2017	

A Down Arrow indicates descending order:

IHSS App Date	Q	Days Elapsed Since IHSS App Date	Q	Referral Date	Q
01/22/2021		153		01/22/2021	
01/08/2021		167		01/08/2021	
12/31/2020		175		12/31/2020	
12/31/2020		175		12/31/2020	
12/24/2020		182		12/24/2020	

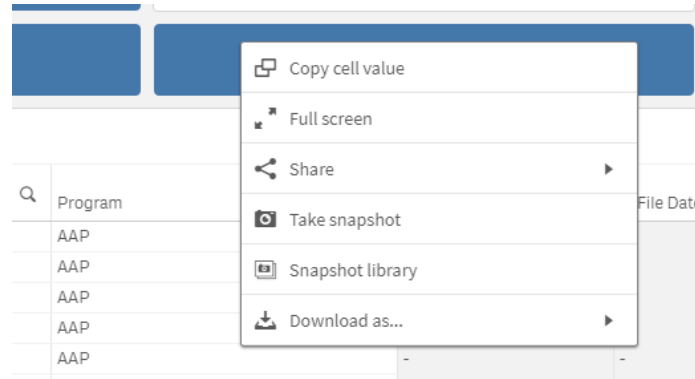
2. To apply two sort criteria, to start sort the column you want to sort second, then sort the column you want to sort first.
 - a. Example: I want to sort by columns "IHSS App Date" then "Days Elapsed Since IHSS App Date". I would first click on the "Days Elapsed Since IHSS App Date" header, then I would click on the "IHSS App Date" header to achieve the sort I want.

3. Browsers

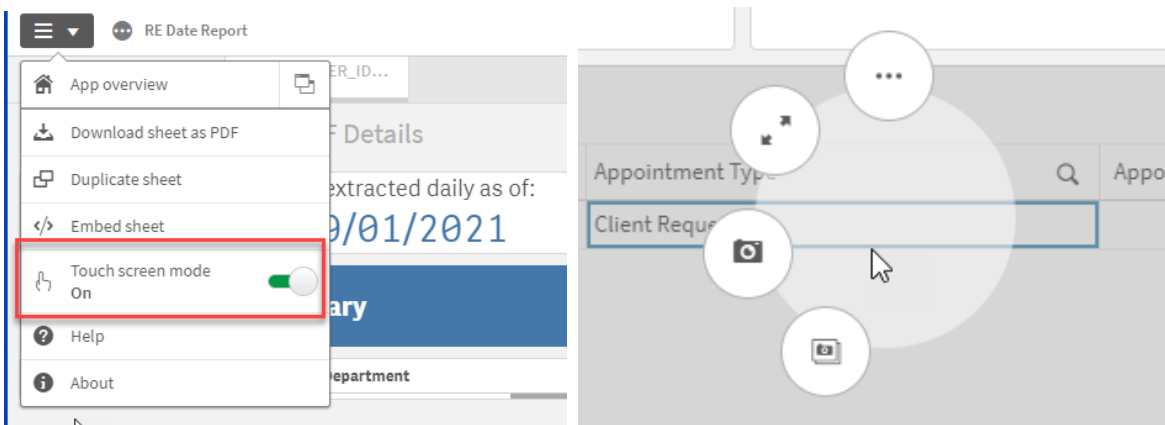
1. Qlik supports the following browsers
 - a. Google Chrome
 - b. Microsoft Edge
 - c. Mozilla Firefox
2. Qlik does not support Internet Explorer
 - a. There is a bug when generating Dynamic views when using internet explorer where the table does not generate and displays a red circle icon. To fix this error either zoom in or out on the window

4. Menu Options

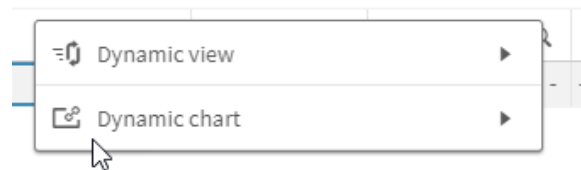
1. To display the menu options of an object the user right clicks the object. Depending on what type of object is clicked determines what options are shown.
2. Examples of the most common menu options
 - a. When a table object is right clicked



- b. When a table object is right clicked with touch screen enabled



- c. When a dynamic view is right clicked

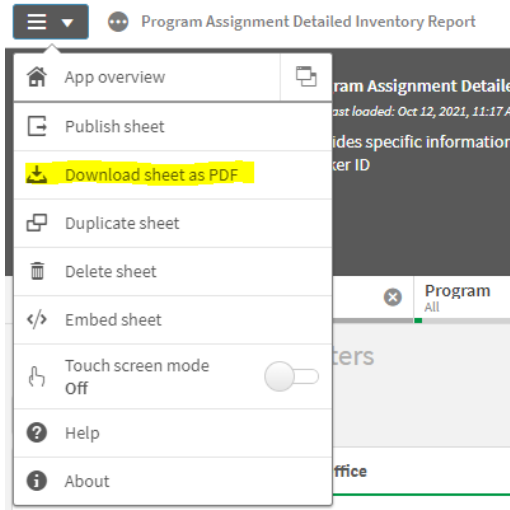


- d. When a table inside of a container is right clicked



4. Download Sheets/objects as PDF

1. Users can “download sheets as PDF” by clicking the hamburger menu and selecting “Download Sheet as PDF”



2. Users can download individual Qlik objects to PDF the following
 - a. Curated on request reports
 - i. right clicking the object → download as .. → PDF
 - b. dynamic view reports
 - i. right click object → dynamic chart → download as .. → PDF
3. Limitations
 - a. Dynamic Views are not supported in the “Download sheet as PDF” option. The user will see the error, "an error occurred during export please try again", or the PDF download will be blank where dynamic views exist.
 - b. The data downloaded will not encompass all the data in each table, but just the data that is in view when the user downloads, like how a screenshot would work.

7. Release F Specific Release Notes

Release Summary

Soft Launch Date 1/15/2021

Hard Launch Date 6/15/2021

On Request reports
Application Activity Report
Child Care Delinquent Approvals Report

<p>Collections Integrated Daily Report Customer Reporting Progress Detail Report Customer Reporting Progress Report EBT Card Reissued on Closed Case Audit Report EDBC not run in Over One Year Audit Report Open Program Audit Report Pending Applications Report Primary Applicant Address Audit Report Scheduled Activities of Active Members Report Short Term Approval Audit Report Time Limit Report Unredeemed Voucher Report</p>

8. Release G Specific Release Notes

Release Summary

Soft Launch Date 3/31/2021

Hard Launch Date 7/7/2021

On Request Repots
<p>1099 Reconciliation Report Caseload History Report Employment Services Customer Reporting Report RE Date Report</p>

9. Release H Specific Release Notes

Release Summary

Soft Launch Date 6/30/2021

Hard Launch Date 9/8/2021

1099 Detail Report
Active End-Dated Activities Report
Activity Report
Administrative Disqualification Hearing Caseload Activity Report
Batch Eligibility Report
Caseload Inventory Report
Child Support Exception Report
CMSP Caseload Report
CMSP Pending Applications Report
Customer Latest Activity Report
DCFS Vendor Overpayment Detail Processing Report
Direct Deposit Status Report
EC-EA Tracking Report
Employee Contact List
Employment Services Program Assignment Report
Employment Summation Detail Report

Employment Summation Report
Engagement Analysis Report
Expedited Service CalFresh Management Report
Foster Care Recovery Account Report
FTB Weekly Intercept Amount Error Report
FTB Weekly Intercept Report
FTB/TOP Weekly Cleared Edit Report with Control Totals
FTB/TOP Weekly Individual Edit Error Report
Home Call Summation Report
IHSS Referral Management Report
Inventory Warrants Voided Report
Longitudinal Analysis Report
MEDS Alerts Summary Report
Needs Status Report
Override/ Manual EDBC Report
Pending Recovery Account Report
Program Assignment Detailed Inventory Report
Program Assignment Summary Report
Quality Assurance Reviewed Workload Inventory Report
Quality Control Summation Report
Quality Review Caseload Activity Report
Quality Review Class Code Findings Report
RDB Service Type and Provider Change Report
Recovery Account Uncollectible Zero Report
Recovery Accounts With Aid Restored Report
Referral Report
Rush Warrant Delivery Confirmation Report a. Expected filter page mismatch: Control Number Filters - As per onshore Comment, On the report filters page, the control number selection cannot be replicated in Qlik. The solution is to add the column "Warrant Number" to the Detail table and the user will be able to make the selection there. (Refer AN-14646 comments) https://change.calsaws.net/browse/AN-8850
Sanction Request Report
Task Completion Report
Task Creation Report
Task Expiration Report
Task Report
Task Workload Report
TOP Weekly Intercept Amount Error Report
TOP Weekly Intercept Report

TOP Weekly Intercept Transaction Report
TOP Weekly Reversal Report
Unassigned Program List
Unverified E-Notification Request Report
Voided Warrants Report
Work Participation Rate Report

10. Release I Release Specific Notes

Release Summary

Soft Launch Date 11/10/2021

Hard Launch Date 2/3/2022

Active SSI-SSA Cases Foster Care Discontinued Report
Active SSI-SSA Cases With Trust Balance Report 1. replatformed report will not have "Trust Balance" on the filter page. Instead, the user can search for "Trust Balance" in the generated report.
CalWORKs and CalFresh Redetermination or Recertification Appointment Report
DCFS MEDS Journal Detail Exception Report
DCFS Outstanding Overpayments Report
DPSS End of Day Cash Receipt Report
DPSS Summary Cash Receipts Report
E2LITE Audit Report
WTW Provider Invoice Reconciliation Report
Vendor Payment Report
CCSAS Download Report- All Distributions
Staff Management Report
DE 542 Report
Inventory Transfer Report
Issued Valuable Inventory Report
RDB Contract Fiscal Claiming Report
RDB Provider Referral Report
Release Note Report 2. replatformed version will not have "Keyword" on the filters page. Instead, the user can search for "Keyword" in the generated report.
Valuable Inventory Report