Qlik Re-Platform Release Summary

Dashboards & Scheduled Reports

Contents

Purpose

Living document to facilitate testing phases and document specific differences between OBIEE and Qlik as reports and dashboards are re-platformed.

Qlik Menus and Navigation

Overview of new Qlik features and menus requested (not found in OBIEE)
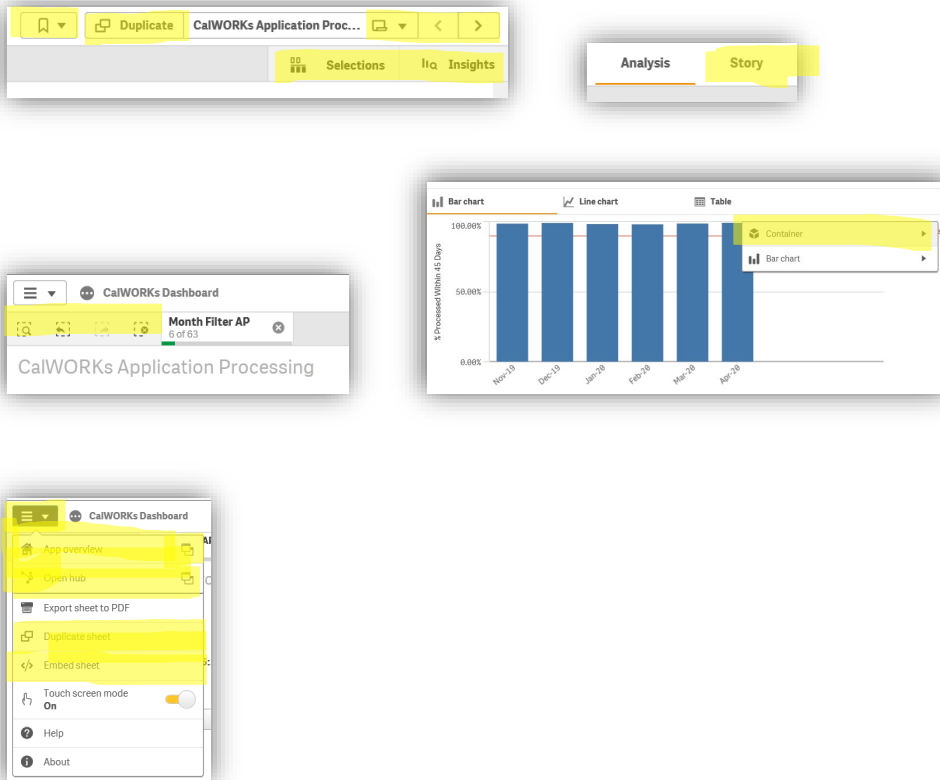
1. Filter Bar

In order, these buttons are *Smart Search, Step Back, Step Forward, Clear all selections*
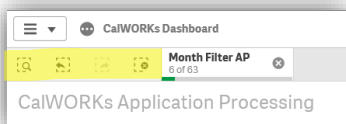
a. Smart Search

Smart Search allows you type in a filter you'd like to apply. For example, if you click smart search and type "division 01" you'll be given filter options that match that text:

Selecting Division 01 from this list then applies Division 01 filter across your view:

b. Step Back

Step Back allows you to go back to your last filter option - Similar to the back and forward buttons on a browser but for the filter bar.

For example: If you add a filter of division 01 to your filter, your filter bar looks like this:
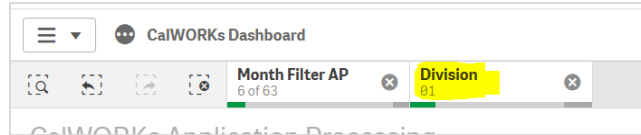
If you click the Step Back button, that filter is removed:
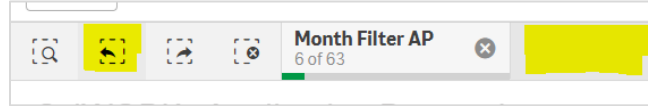
c. Step Forward

Step Forward allows you to go forward to your previous filter option - Similar to the back and forward buttons on a browser but for the filter bar.

Continuing the example above: If you click the Step Forward button, the Division 01 filter is re-applied:
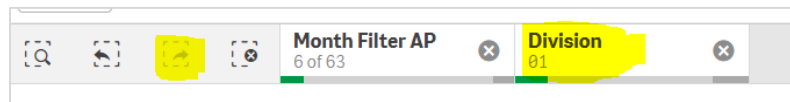
d. Clear All Selections

Clear All Selections allows you to clear all filters from your filter bar.

For example, if you have the last 6 months and division 01 filters selected, your filter bar looks like this:
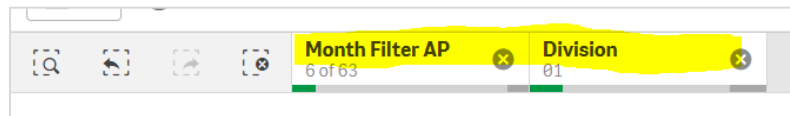
If you select the Clear All Selection button, all filters will be removed from your filter bar:

2. Container bar
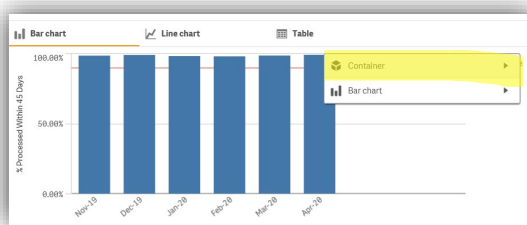
The container is an object that contains other objects. The container can contain all other sheet objects. The objects are grouped together and have common settings for font, layout, and caption. The container menu currently doesn't have anything more on it than the embed option, but should we add more complex objects there is a possibility to have options in the container menu.

3. Story tab
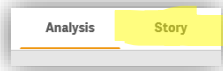
The story tab allows you to create presentations (similar to PowerPoint) using the data in Qlik to tell a story to an audience. The functionality is limited, with the primary benefit being the ability to use charts from the dashboards and have more interactivity than an actual PowerPoint. Stories put together here can be exported to PPT, but the interactive graphs will only be exported as images. More information about how to use this can be found on Qlik's website here:
https://help.qlik.com/en-US/sense/April2020/Subsystems/Hub/Content/Sense_Hub/StoryTelling/Story/build-story.htm

4. Hamburger Menu
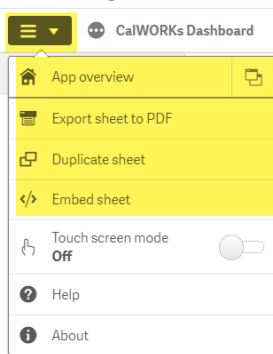
a. *Application overview*
Clicking the app overview option in the hamburger menu will take you to the application overview page. This is where you manage sheets, bookmarks, or stories. Public content is shown under Public sheets/Public bookmarks/Public stories. Your private content is displayed under My sheets/My bookmarks/My stories. For more information, see the Qlik website: https://help.qlik.com/en-US/sense/April2019/Subsystems/Hub/Content/Sense_Hub/Apps/app-overview-cloud-hub.htm

b. *Export Sheet to PDF*
Selecting this option allows you to export the screen to a pdf document.

c. *Duplicate sheet*
You can duplicate any sheet, regardless of whether it is a sheet that belongs to the app or a sheet you have created yourself. The purpose of duplicating sheets is to save time by reusing content, and to allow you to modify the duplicate so that it fits your needs better. A duplicated sheet contains the same visualizations as the original sheet and is

linked to the same master items. The duplicated sheet is a standalone sheet with no connection to the original sheet. Duplicated sheets appear under My sheets in app overview and in the sheet navigator. https://help.qlik.com/en-US/sense/April2020/Subsystems/Hub/Content/Sense_Hub/Sheets/create-sheets-for-structure.htm#anchor-11

d. *Embed sheet*

Brings up the embed sheet window and allows you to create a custom iframe for use in embedding into a webpage. https://help.qlik.com/en-US/sense/April2020/Subsystems/Hub/Content/Sense_Hub/Visualizations/embed-visualization-sheet.htm

5. Top Level Menu
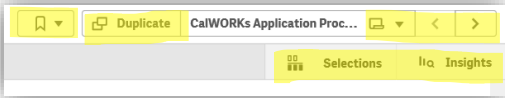
a. *Bookmark*

 Allows you to bookmark the page you're on, see pages you've previous book marked, or search through all your Qlik sense bookmarks

b. *Duplicate Sheet*
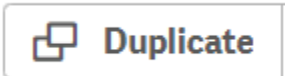
 Duplicate sheet (see 4.c description above)

c. *Sheet navigation buttons*
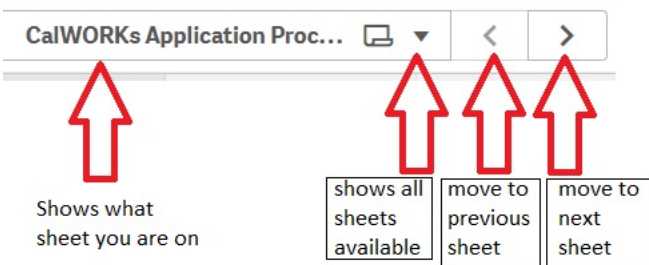
d. *Selections Tool*
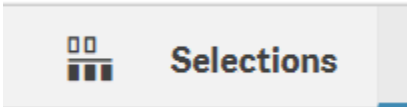
The selections tool gives an overview of every dimension and field in an app. It also gives a more detailed view of selected data, so that you can explore associations in

dimensions that have not been used. https://help.qlik.com/en-US/sense/April2020/Subsystems/Hub/Content/Sense_Hub/Selections/use-selection-tool.htm

e. *Insights (Use within the context of the selections tool)*
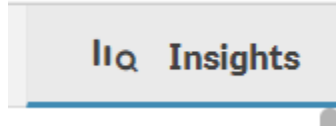
When generating insights, Qlik Sense looks at your selections and analyzes the excluded values in your data model. It then highlights data that may be of interest for further exploration. That data is displayed in cards, which can be clicked to provide a more detailed view. More information can be found here: https://help.qlik.com/en-US/sense/April2020/Subsystems/Hub/Content/Sense_Hub/Selections/associative-insights.htm

Dashboard Formatting Standards

1. Logo

The LA County Seal logo has been removed from the dashboard in Qlik and has been replaced with the logo "CalSAWS".

Qlik Example:

OBIEE Example:
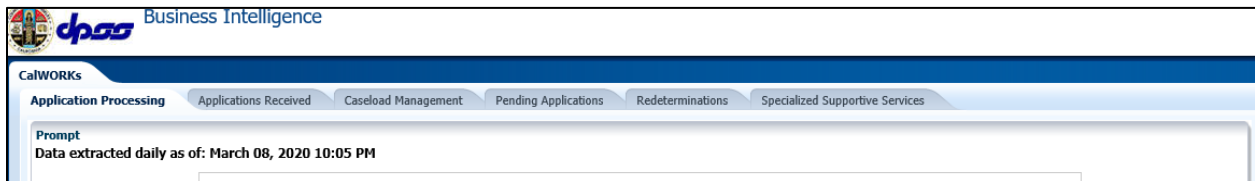
2. Branding, Fonts, and UI Colors

There is flexibility within the Qlik UI to create and maintain a branded appearance. This is primarily limited to the logo within a banner at the top of any given sheet, as well as the font and banner color itself. A standard image and color scheme are applied to all applications within a specified group to make them easily identifiable and to avoid confusion. Where possible we have implemented a similar style to OBIEE for consistency.
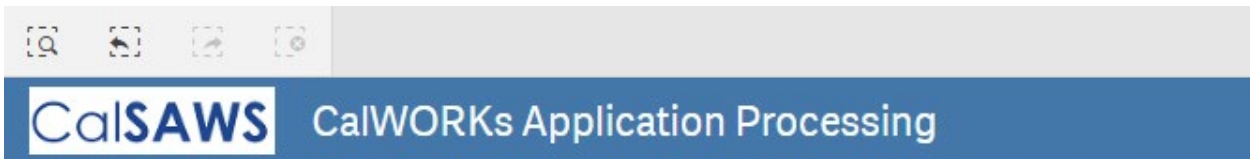
Key considerations:

- Additional and more granular customizations to the UI are possible, however they are generally not ideal as they must be reapplied and accounted for at each upgrade to prevent being overridden.

- The critical part is to be consistent across sheets and dashboards, of which there are many. An efficient way to accomplish this feat is to use a common theme across all dashboards, or to simply leave them in the default, out-of-the-box state.

The default Qlik font size, style, and color will be used in all charts, legends, mouseover tooltips, axis, and other objects. The exception to this rule is when the size of the font in pivot tables or tables needs

to be adjusted for better visibility. However, even this approach will be done consistently throughout all dashboards.

3. OBIEE tabs are now buttons

In OBIEE, navigation between dashboards for a program was displayed using tabs:
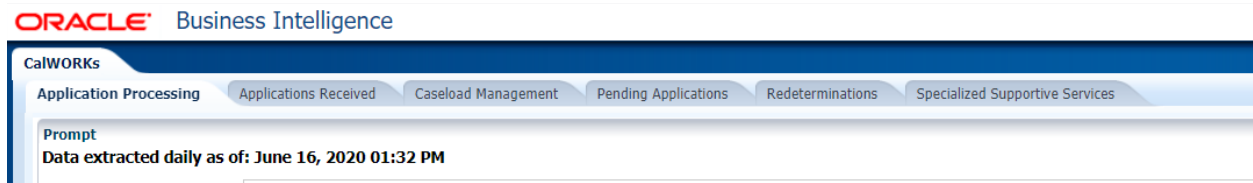
In Qlik, this same navigation is reflected using buttons:
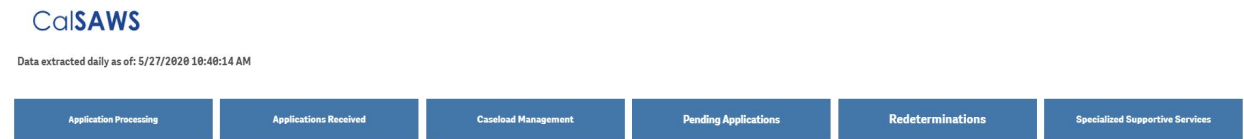
4. Chart Colors

The Qlik default color scheme is used wherever possible which will not necessarily match the OBIEE chart colors. The default color scheme includes a mix of colors for fewer dimensional values, with blue being the default for all charts. For circumstances where there are many more than 12 dimensional values, Qlik offers a 100-color spectrum that follows the same visual principals.
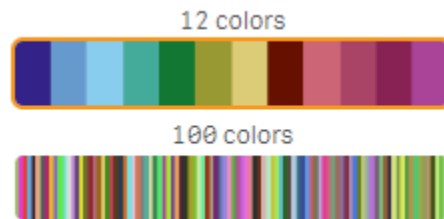
Figure 1 - Qlik's default color scheme

Key considerations:

- The default color schemes have been thoroughly vetted by Qlik as being effective at displaying variances with enough contrast to be easily identified, and they are friendly to those with various forms of color blindness or low vision.

- Maximum, minimum, or comparative values can be independently colored where it is otherwise difficult to distinguish between them or they need to be compared against a goal.

- Alternating or otherwise assigning arbitrary colors based on individual preferences for dashboards that are viewed by many users is not a recommended practice, as it negates the benefits of a color scheme designed to be visible to users with colorblindness or low vision.

Exceptions

The capability to modify colors to meet a specific chart requirement is a feature and a valid consideration when developing dashboards and reports. However, it must be weighed against uniformity, visual fidelity, developmental cost, and the overall platform environment. Where there is a specific need to use a particular color to highlight a value on a chart, we will document that requirement in the specific release notes section for that Dashboard.

5. Chart mouseover

In Qlik, the tooltip presented on mouseover is not editable in font size, style, or content, and is set based on the data available in the chart.

For example, in OBIEE, the mouse over for this chart adds a label to the division value being hovered over and the month value being hovered over:
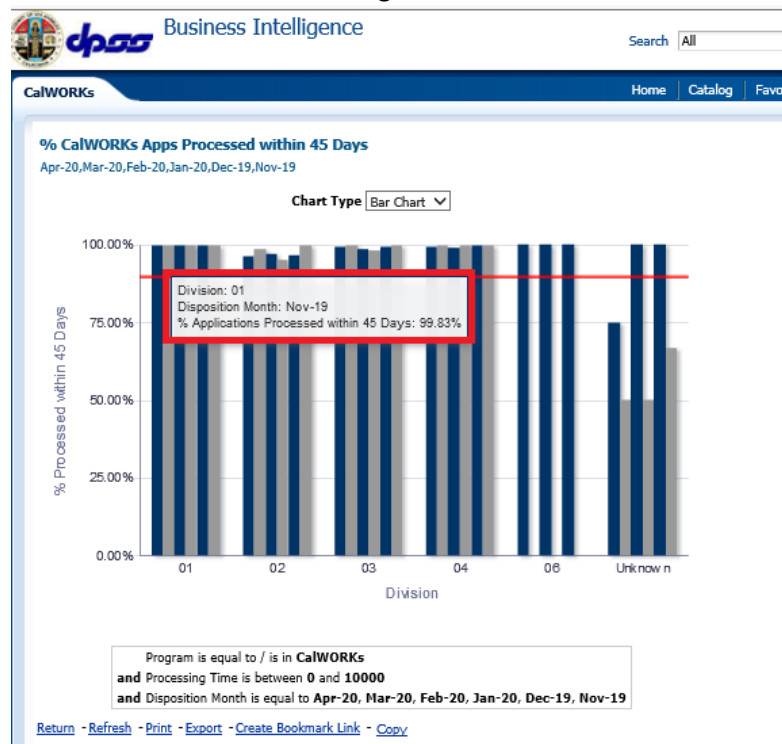
However, in Qlik, the mouse over lists the division value being hovered over and the month value being hovered over without a label, simply comma separating them as "Mar-20, 01" for values March 2020, Division 01:
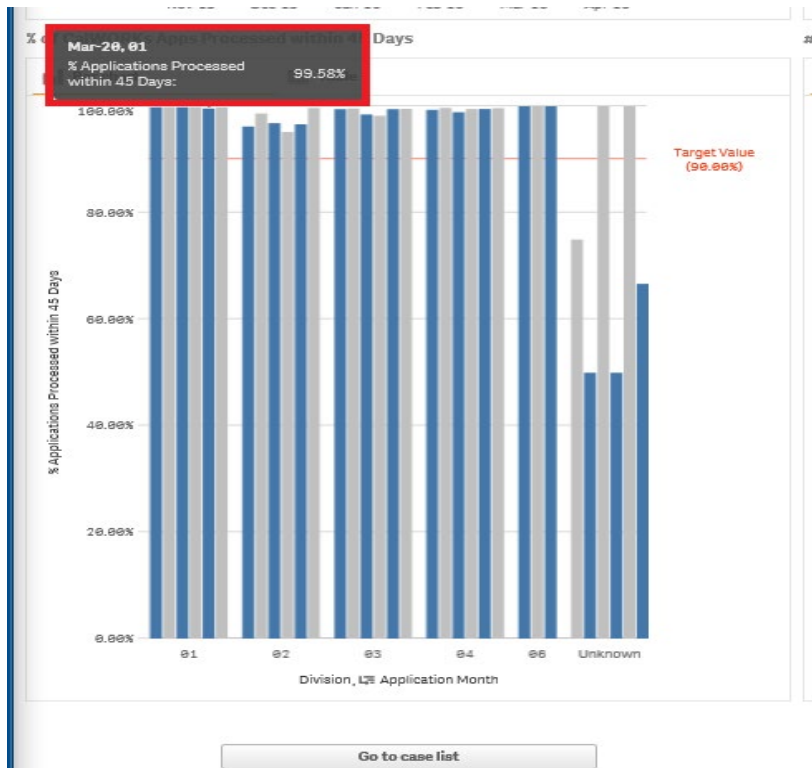
The mouse over will also display aspects such as values or counts that are not automatically displayed due to constraints outlined in the next section: Chart Sizing.

6. Chart Sizing

Chart sizing is very important, and Qlik Sense will automatically scale the charts to conform to the available screen space or monitor scaling options. On screens with lower resolution or DPI settings, Qlik may automatically adjust the chart to show only the key components, potentially hiding items such as legends, scroll bars, or axis and value labels.

Forcing these objects to appear in Qlik Sense is not always possible and can have adverse effects on the other chart elements. As an example, forcing a scrollbar may eliminate the dimension labels on the axis as the screen size decreases, rendering the chart more difficult to understand. Qlik's default scaling approach means that the most critical aspects of a chart will remain visible, even as the screen size shrinks.

For example, in OBIEE, the bar chart for Mental Health/Substance Use Disorder Cases Over 90 Days by Reason shows all offices reason code bars forced to shrink down to display all values. Even on a large monitor, this chart is hard to see and interact with:

Mental Health/Substance Use Disorder Cases Over 90 Days by Reason
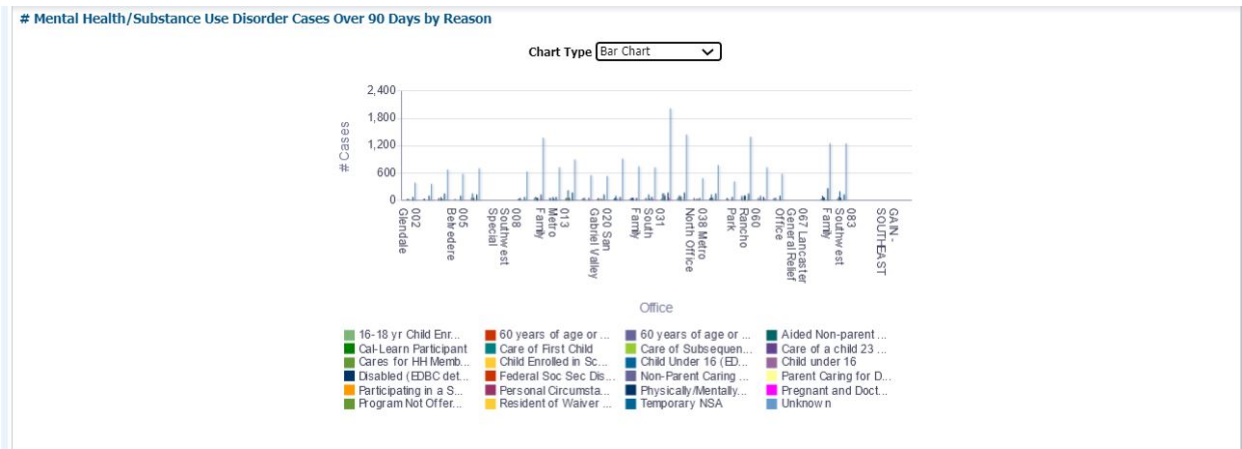
However, in Qlik, the default bar chart settings will apply a scroll bar to x-axis allow you to scroll through the offices to see all values while still being able to interact with the data:
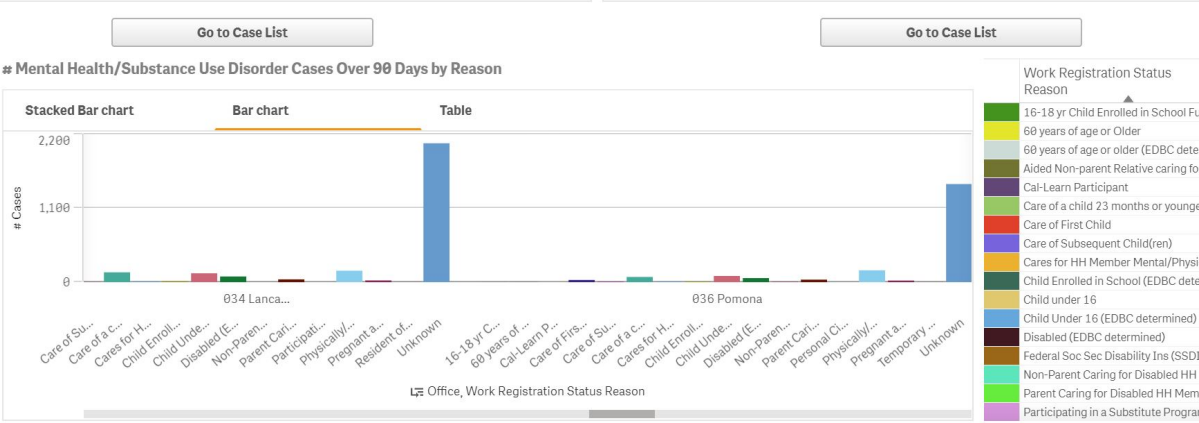
Having a large screen or higher DPI settings allows more values to appear while keeping a usable sized screen area for interacting with the data.

7. Scaling

Y-axis will not be on a fixed scale and will adjust based on the most accurate representation of the data – so scale may be higher or lower than OBIEE. Qlik is UI responsive so depending on the selection of data, the Y-axis will update appropriately.

CalWORKs Application Processing

 # CalWORKs Applications Processed
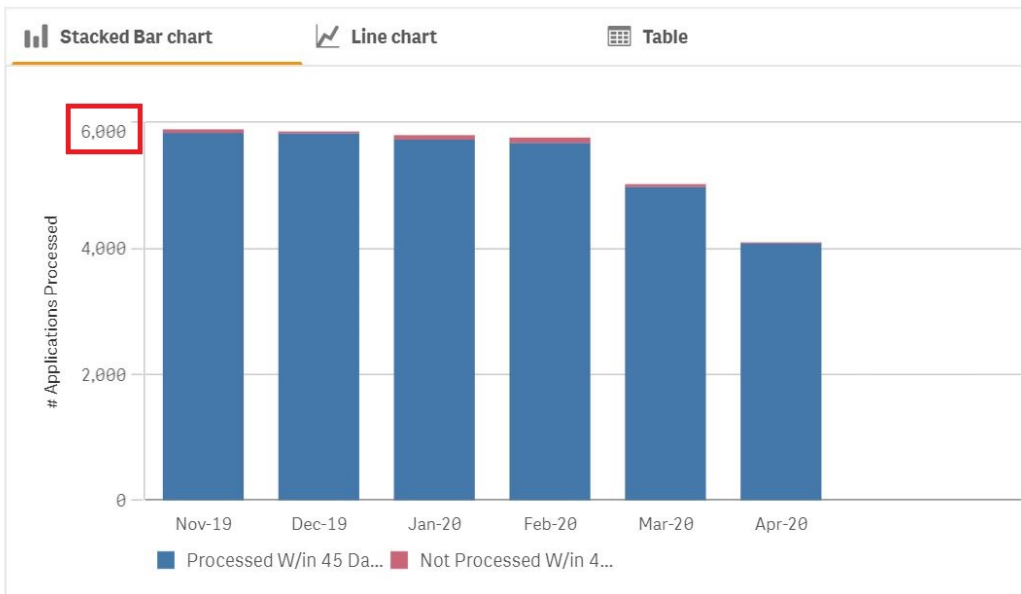
       i.   OBIEE has a fixed Y-axis.

OBIEE Example:
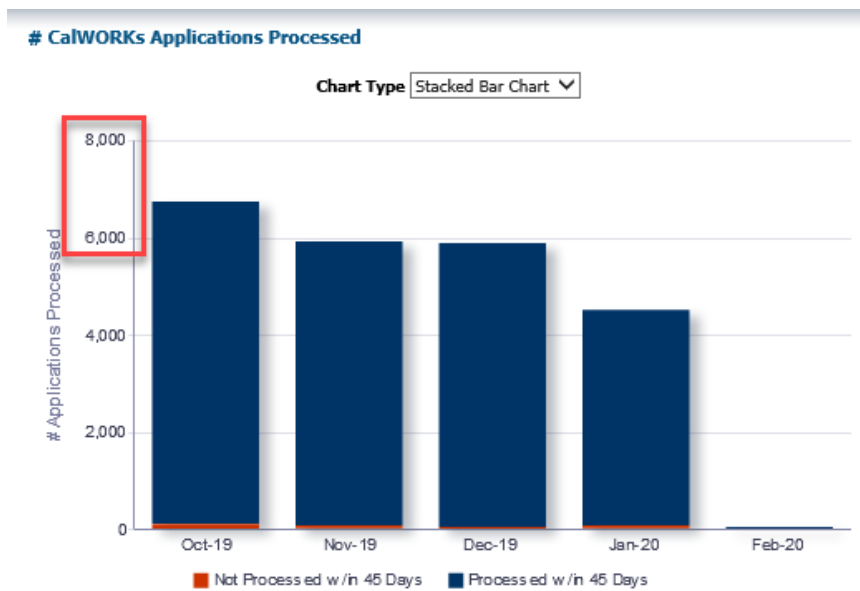
8. Chart values will not be abbreviated

In Qlik, values on chart will be displayed in whole numbers and not reported with a K distinction

For example, Qlik displays hundreds of thousands on the Y- axis.

CalFresh Active Caseload

| Bar chart | Line chart | Table |
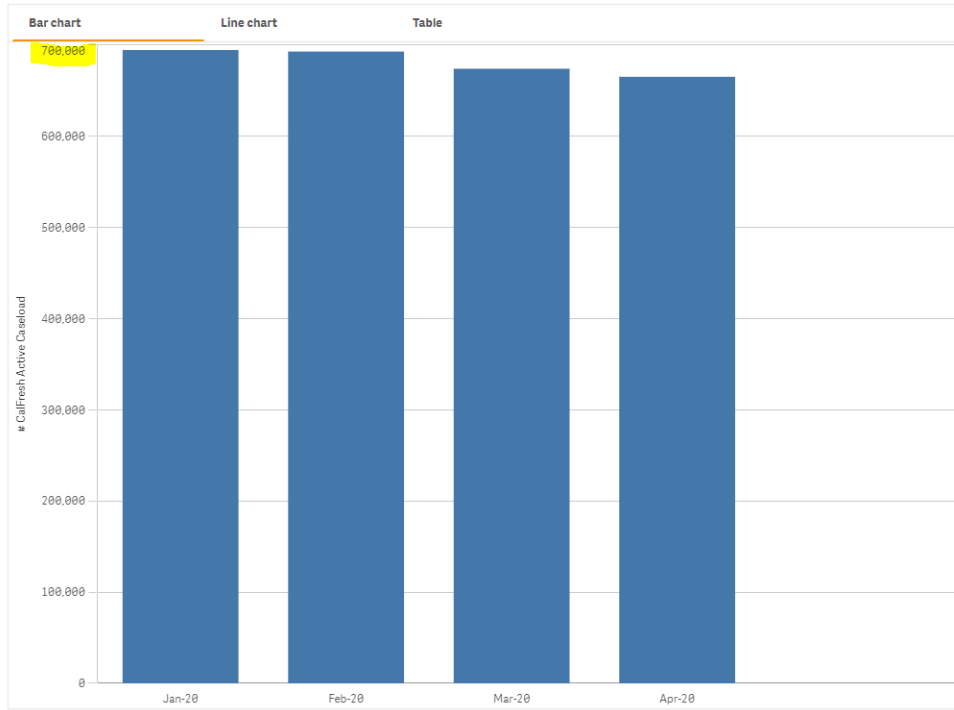
However, in OBIEE, this would be abbreviated with K:
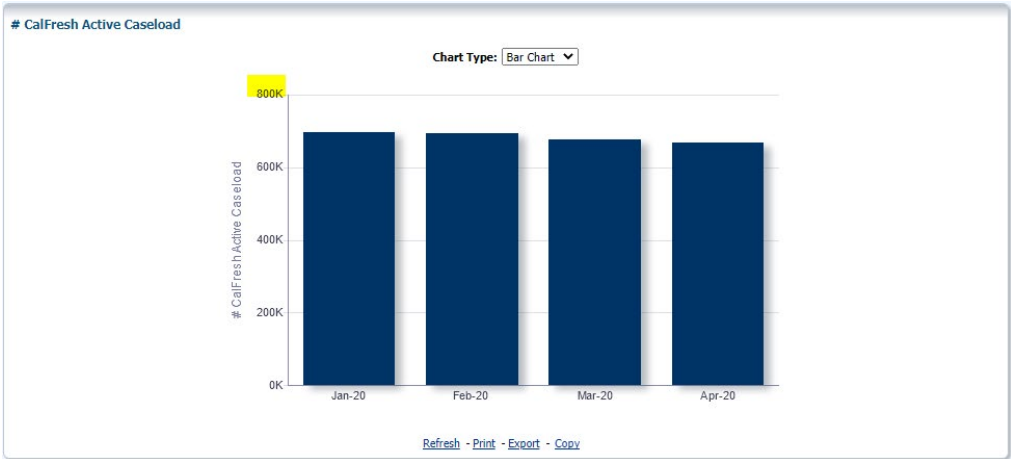
9. Chart Legend Text

Qlik will only display up to the 27th character in length text. For example:
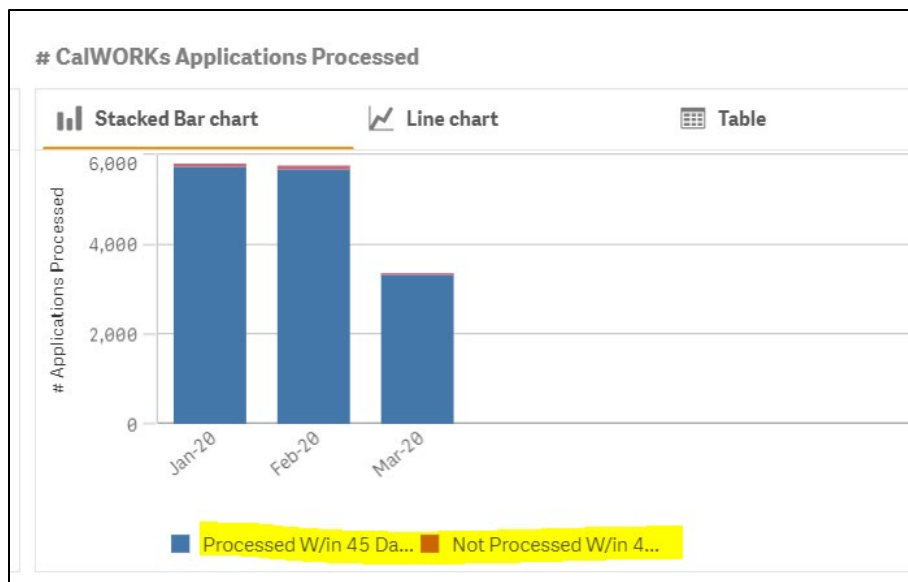
However, if you move the mouse over, all characters are displayed
(https://support.qlik.com/articles/000081071).

10. Date Filter

a. The Month filter will always have the label "Month" displayed on it even after a Month has been selected (as this is native Qlik functionality). Once a month has been selected, the selected Month will be displayed on the top filter Bar within Qlik. Compared to OBIEE, where the Month filter will display the Month that has been selected in the Filter itself. (This behavior occurs across all filter and data selections)

b. If a particular date (Month-Year) does not exist in the data source, the Month will not be displayed in the Month Filter. **please refer to Filter Behavior for more information

Qlik Example:
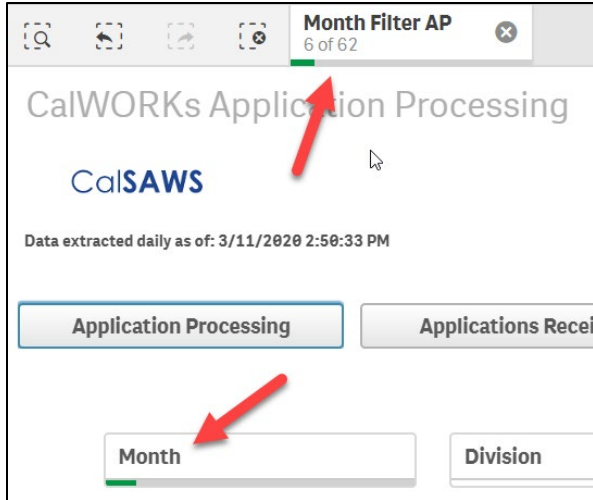
OBIEE Example:
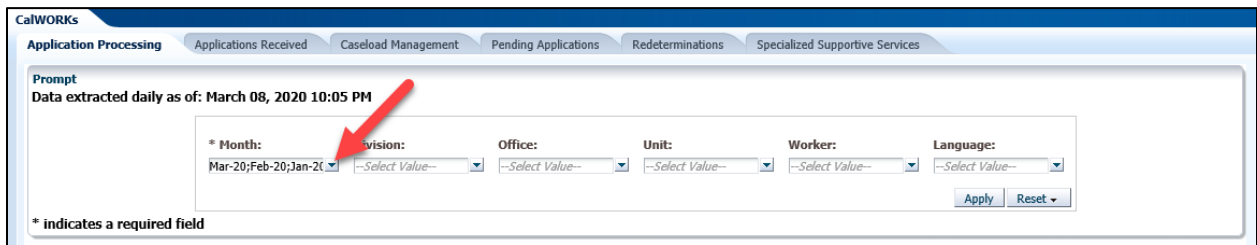
11. Filter Apply

In OBIEE there is an apply button to apply the Month Filter selection whereas in Qlik there is a green check mark to apply the month selection. Selections in Qlik can be removed individually by selecting the individual value in the filter. Filters can be reset by clicking the red X at the top bar filter or entirely by clicking the Reset button next to the filter.

Qlik Example:
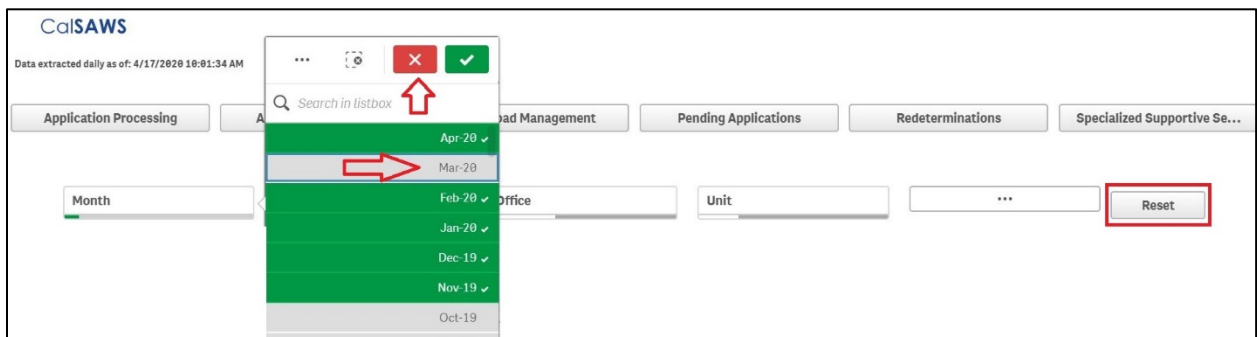
OBIEE Example:
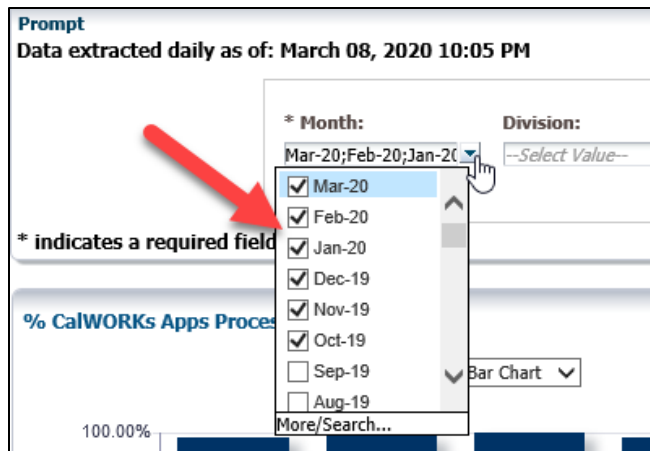
12. Filter Behavior

Selection

In Qlik, filters and dropdowns show associated values and checkmarks. See *Color Guide Key* below for further information.

Qlik Example:
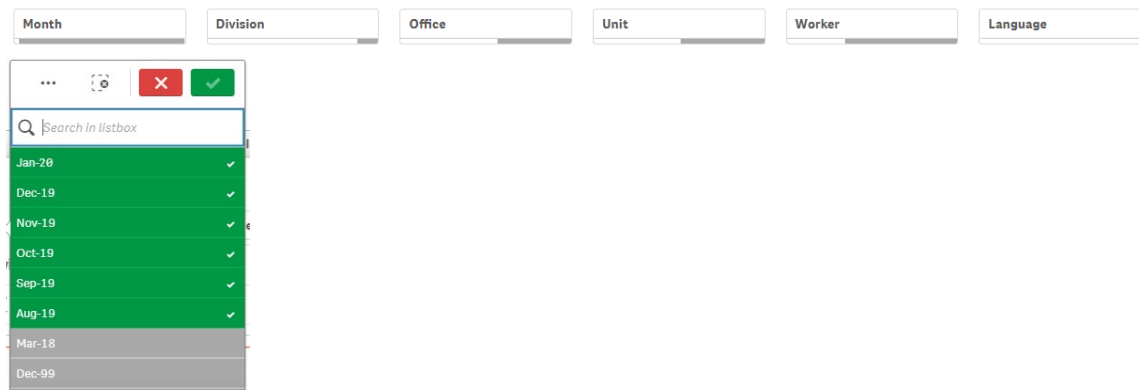
Color Guide Key

Colors Used for Different States	
Color	State
Green check	Selected
White	Possible
Light gray	Alternative
Dark gray	Excluded
Dark gray with a check mark	Selected excluded

OBIEE will have checkboxes in the dropdown

OBIEE Example:
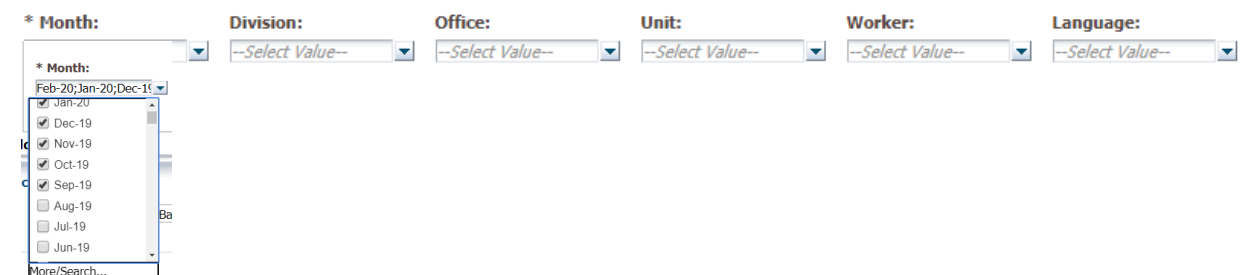
Filter Behavior for "Starts," "Contains" and "Ends"

In Qlik, users can perform this at the top level of the search using asterisks in place
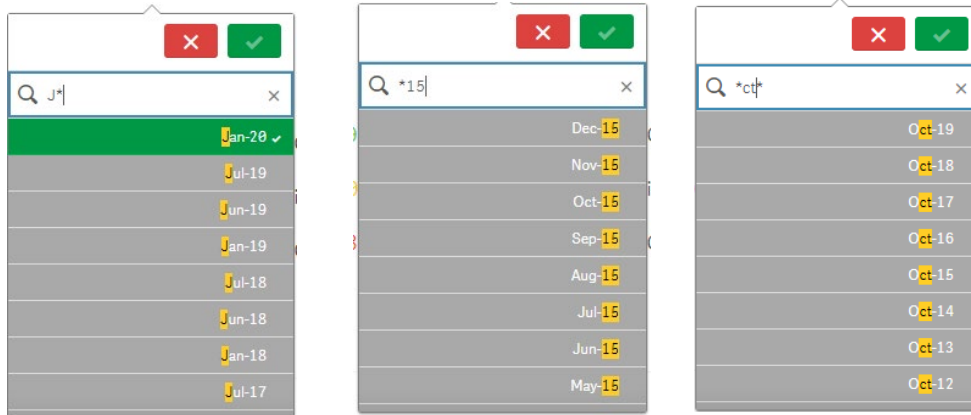
ii. in OBIEE, Users need to go into the "More/Search…" level to perform these searches
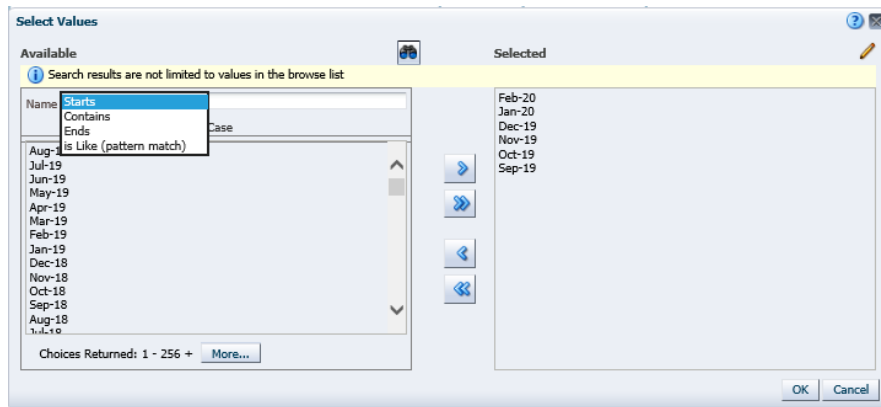
13. Chart Behavior

If no data exists for the selected filters, the charts will display without data for the excluded field value.

OBIEE Example:

Welfare-to-Work Mandatory

Chart Type: Pivot Table

	Nov-20	Dec-20
Assigned to Worker	0	0
%	0.00%	0.00%
Not Assigned to Worker	38,016	37,621
%	100.00%	100.00%

Qlik Example:

Pivot table		Stacked Bar chart			
Mandatory Reason 🔍	Month 🔍	Values			
		Nov-20		Dec-20	
	# Cases	%	# Cases	%	
Not Assigned to Worker	38,016	100.00%	37,621	100.00%	

14. OBIEE Refresh/ Qlik Reset

The OBIEE "Refresh" button is now titled "Reset" in Qlik. The "Reset" button is in the top right corner of the dashboard.

Qlik Example:

iii. Refresh button was at the bottom of every chart.

OBIEE Example:

Chart Type Bar Chart ▾
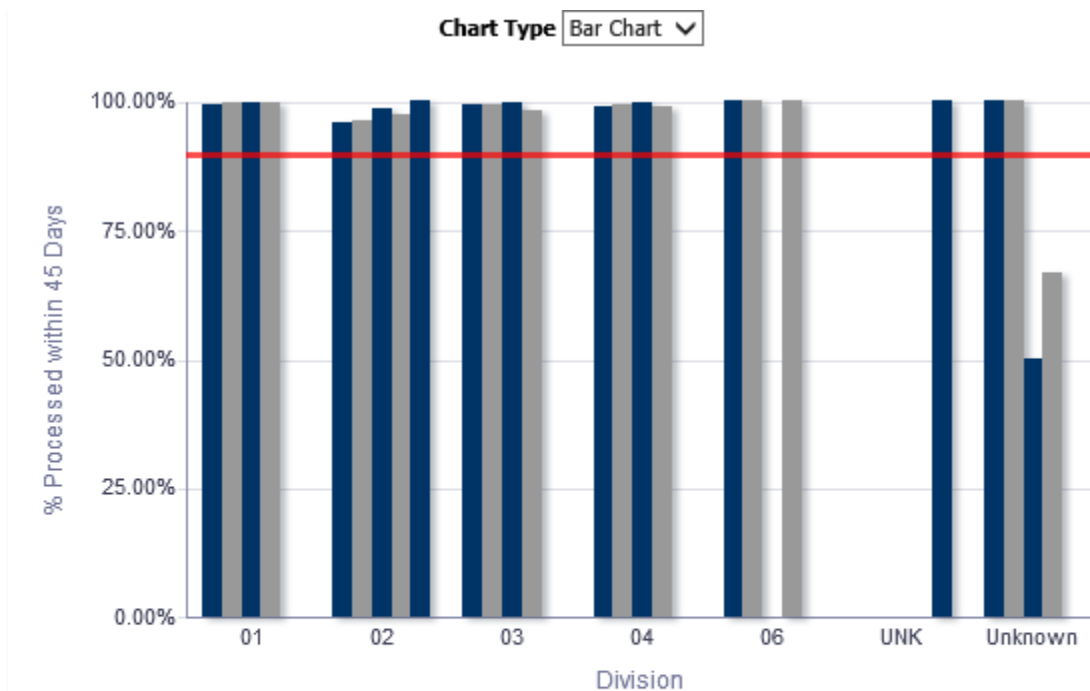
Program is equal to / is in **CalWORKs**
and Processing Time is between **0** and **10000**
and Disposition Month is equal to **Mar-20, Feb-20, Jan-20, Dec-19, Nov-19, Oct-19**

Return - Refresh - Print - Export - Create Bookmark Link - Copy

15. Exporting Charts

Qlik will not show download capabilities in Excel, PowerPoint, Web Archive, and Data (CSV, Tab Delimiter Format, and XML Format) like OBIEE does. In Qlik, export is available for PDF, Image, and Excel. To export, right click on a chart, then select chart type, then select export, and select your export option, or to export to PDF click the hamburger menu on the left-hand side and select "export sheet to PDF".

Important Notes: There is no direct to csv option from Qlik Sense. One would have to export the data into excel, open the document, then save the file as a csv. Additionally, there is a 1,000,000-row limit in excel exports. Rows beyond the limit will be truncated, and the user will be met with this screen confirming:

Export complete

Your exported data is ready for download. Please note that your dataset was too large and has been truncated.

Click here to download your data file.

Qlik Example:

To export in OBIEE, click the export button at the bottom of the chart.

OBIEE Example:

Additionally, in Qlik, you can duplicate the sheet or create a story for a more interactive PowerPoint like feel. For more information about sheet duplication and creating a story, please see **Qlik Menus and Navigation** in this document, sections 3 and 4.c.

Exports from Dashboards will not have any data or chart transformations. All values and fields will be exported directly from the chart and not subject to rounding or omission, etc.

16. Drill Downs and Levels (Month / Division)

Qlik's UI is responsive which makes drill down easy. To drill down to month/division click a division from the bottom charts and all data on the data dashboard will automatically be updated. From there, you can then select the "Go to Case List" button on the bottom of the dashboard.

Qlik Example:

Division Drill Down Example - Qlik

% of CalWORKs Apps Processed within 45 Days (Drilldown)
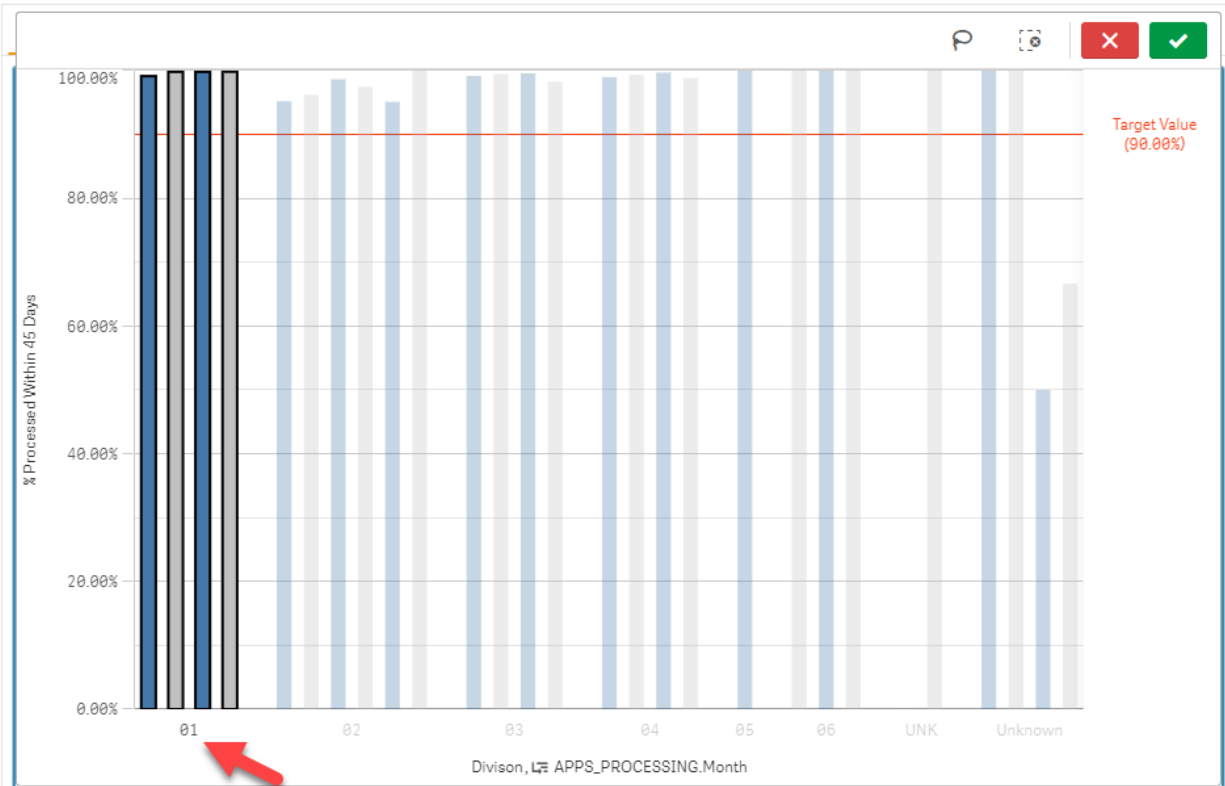
Case List Drill Down Example - Qlik
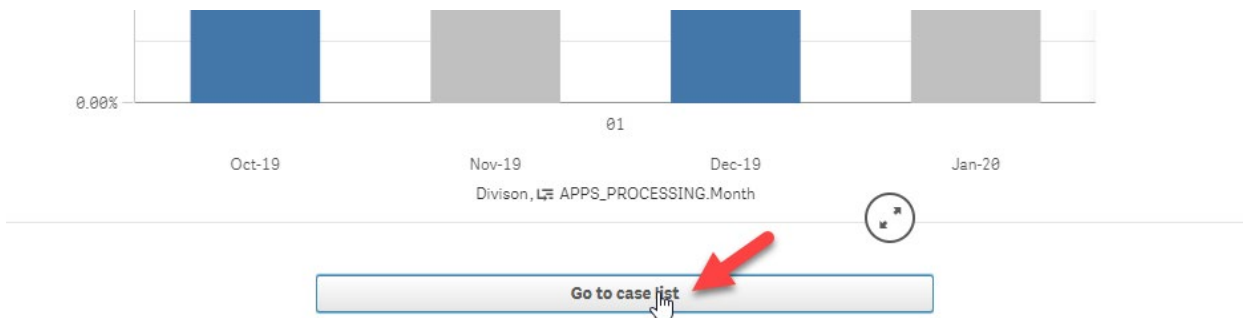
To drill down in OBIEE, right click on the graph and continue to right click on the graph until you drill down to the desired level.
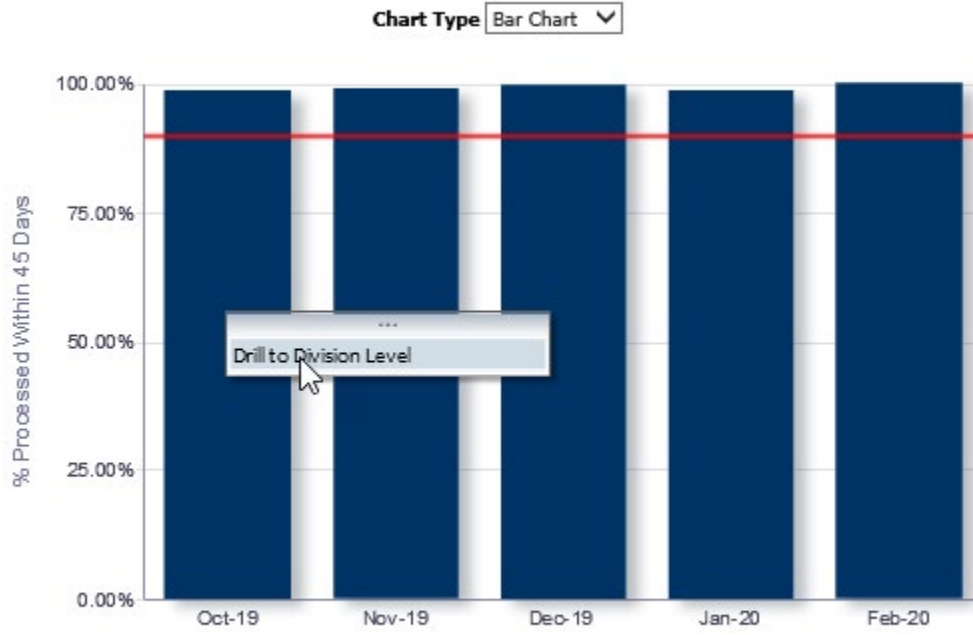
OBIEE

Division Drill Down Example - OBIEE

Case List Drill Down Example - OBIEE
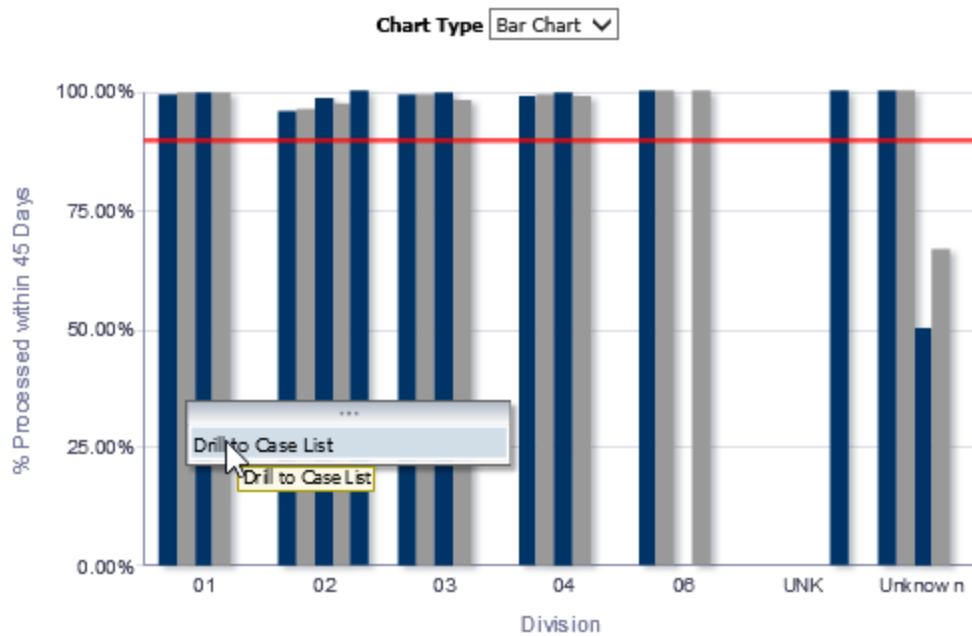
17. Case Number Links

There will be 2 Case Number fields in Qlik, one case number will be for the case number link and another for the actual fields.

Qlik Example:
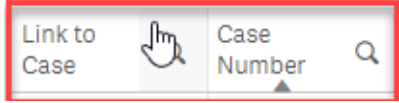
       iv. OBIEE only displays one case number.

Upon export of the case list with the 'Link to Case' field, the underlying hyperlink will export as opposed to the Case Number. The Case Number field is typically to the right of the Link to Case field and will export and display as expected.

	A	B
1	Link to Case	Case Number
2	https://web.c	

18. Sorting of Case Number

In OBIEE case number is sorted numerically and then alphabetically. In Qlik alphanumeric values are sorted in a natural sort order, where numerical parts are sorted based on their entire numerical value rather than per digit. In Qlik, sorting happens alphabetically first and then numerically

19. Pivot Table Field Order

Qlik will alphabetize fields in Pivot table and will also use natural sorting method.

Qlik Example:

	Care of a child 23 months or younger	Care of First Child	Care of Subsequent Child(ren)	Cares for HH Member Mental/Physically Impaired	Child Enrolled in School (EDBC determined)
002 Glendale	15	10	1	5	1
003 Pasadena	22	10	4	2	2
004 El Monte (San Gab. V. Serv. Center)	39	14	12	10	11
005 Belvedere	18	11	4	3	9
006 Cudahy	47	7	5	11	16
007 South Special	-	-	-	-	-
008 Southwest Special	-	-	-	-	-
011 East Valley	22	24	2	4	12
012 Exposition Park Family Service Center	66	30	4	1	12
013 Metro Family	44	27	6	2	9

OBIEE Example:

Office	16-18 yr Child Enrolled in School Full Time	60 years of age or Older	60 years of age or older (EDBC determined)	Aided Non-parent Relative caring for at risk child	Cal-Learn Participant	Care of First Child	Care of Subsequent Child(ren)	Care of a child 23 months or younger	Cares for HH Member Mental/Physically Impaired	Child Enrolled in School (EDBC determined)	Child Under 16 (EDBC determined)	Child under 16
002 Glendale			1			10	1	15	5	1	19	
003 Pasadena	1		1			10	4	22	2	2	17	
004 El Monte (San Gab. V. Serv. Center)		1	1		1	14	12	39	10	11	66	

20. Total Row is displayed at top and total column displayed left most

21. Extra ID column in Case Lists

In Qlik, total row count is displayed at the top rather than the bottom so that users do not have to scroll to the bottom to see the total row count. Likewise, total column is displayed as the left most column for the same reason.

22. Case List extra column

Some Case Lists will contain an extra column (PGM_ID, ID, or PGM_APP_ID) that is used to display all records that fit the filter criteria. By default, Qlik will hide duplicate records. To display each instance of a record and match the count shown on the Charts, an extra field must be added to the case list. The field is displayed in Qlik and not in OBIEE due to OBIEE's ability to hide specific columns (i.e. PGM_ID, ID, PGM_APP_ID). Qlik will not hide columns but will still display the records.

This field is displayed in Qlik and not in OBIEE due to OBIEE's ability to hide specific columns (i.e. PGM_ID, ID, PGM_APP_ID). Qlik does not hide columns but still display the records.

23. Case List Return Button

On each Case List sheet there is a return button below the Case List to return you to the main dashboard sheet you just came from. Clicking the return button to return to the main dashboard sheet will strip any custom filters from your filter bar and reset you back to the default filters for that sheet.

For example:

If you appeal an office number filter and region filter, then click to look on the case list for the Unassigned Pool with Mandatory Work Registration KPI, you'll be directed to the case list for that with filters still in place and listed at the top in the filter pane:

If you click the return button on this Case List sheet to go back to the WTW REP Activity Report Dashboard, it will remove your custom filters of Office number and Region and re-apply the default filter of most current month:

If desired, to restore your custom filters, just use the filter navigation bar at the top (after you have returned to the main dashboard) to reapply the last filter values you had set:
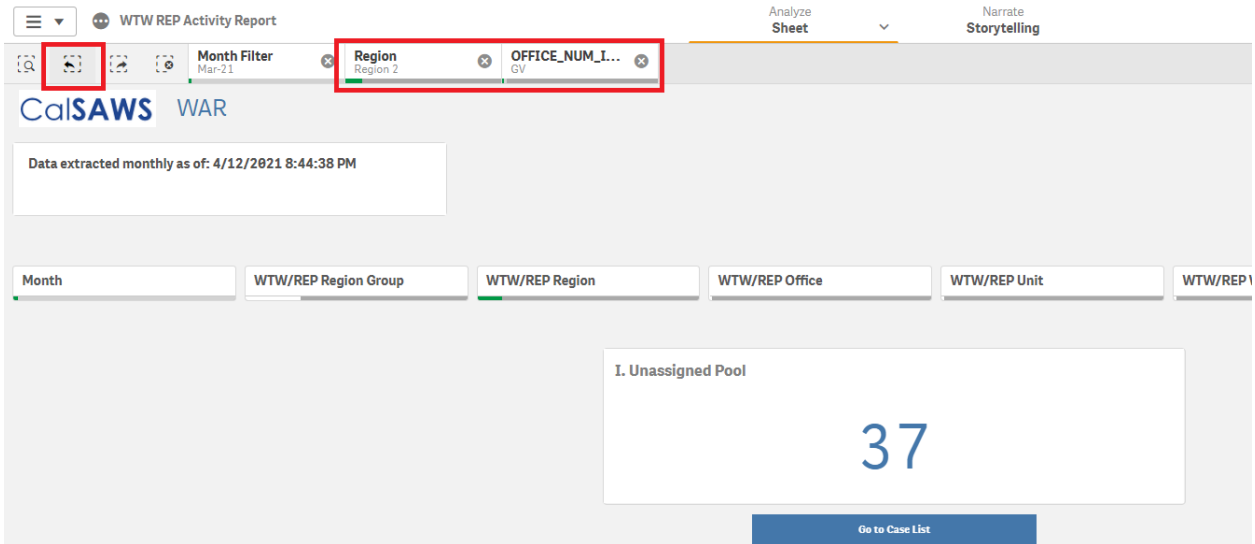
For more information on using the filter navigation bar, please see the above section "Qlik Menus and Navigation" -> "Filter Bar".

Report Formatting Standards

1. Report Title

Report Title should follow this standard:

In Newstand
County CODE_Report Name_P-PGM Code_A-Aid Code_RPT Month(MMDDYYYY)_Report Run Date(YYYYMMDDHHMMSS).xlsx

In Sys6
Report Name PGM Code/AID Code Date (MM-DD-YYYY)

2. Date Formatting

Date formats should be represented similarly across all reports.

- The suggested format is MM/DD/YYYY for daily values or MM/YYYY for monthly.
- It is recommended that timestamp columns it should be the same format with HH:MM TT (12-hour clock) included for ease of use.
- Run Dates for the titles of the reports should be in this format MMM-DD-YY HH:MM TT

3. Expected Variance Between Source & Target Output

In conjunction with following best practices, data types in reports should match the source data wherever possible. Below is a list of expected differences within the Source and Qlik Sense Reports

- Null values appear as '-' (not blank spaces).
- Zeros will appear as zeros (not blank spaces).
- Aggregations will appear as containing Null values and Zeros. These aggregations can typically be found on summary pages where there is no data present in the RDS table
- When there is no data in a table that has no RDS data present, it should appear as completely blank and will include the template with column data unless there are any type of aggregations included. Please ask the developer for clarification on this.
- Time or date-based strings will be converted to time or date format and will be aligned top and left.
- Strings will remain strings (including '09' county code as '09' instead of '9').
- Measures will be reported as numbers and aligned top and right.
- Numbers previously or erroneously represented as strings should be reported as numbers.

4. State Summary Reports

Formatting for existing state summaries within reports will only be formatted in the content (*highlighted in yellow*) being fed from data source (*see image below*):

- Font Type: Calibri
- Font Size: 12
- Alignment for numeric values: Right
- Font Color: not changed and kept as it exists in the form
- Font Bold: not changed and kept as it exists in the form

CalFresh
Participant by Race/Ethnicity, Sexual Orientation and Gender Identity
State-Only and Combined Households
CF 358S

DOWNLOAD REPORT FORM FROM:
https://www.cdss.ca.gov/inforesources/Research-and-Data/Report-Form-and-Instructions
EMAIL US FOR QUESTIONS ABOUT THE FORM OR INSTRUCTIONS:
admCF358FS@dss.ca.gov
EMAIL US FOR TECHNICAL SUPPORT QUESTIONS:
admdesdcfts@dss.ca.gov
Automated Form Updated: 07/24/19

COUNTY NAME	VERSION	REPORT MONTH	REPORT YEAR
Los Angeles	Initial	June	2020

Number of State-Only and Combined Households participating in CalFresh during July by race and residence status.

Race	A. Number of Household Contacts by Race			B. Number of Hispanic or Latino Household Contacts Reported in A. by Race		
	PA Households	NA Households	TOTAL Households	PA Households	NA Households	TOTAL Households
1. Household Contacts Who Marked Only One Race						
American Indian or Alaska Native	1 0	2 7	3 7	4 0	5 5	6 5
Asian Categories	7 36	8 610	9 646	10 0	11 0	12 0
Asian Indian	13 2	14 41	15 41	16 0	17 0	18 0
Cambodian	19 2	20 27	21 29	22 0	23 0	24 0
Chinese	25 11	26 61	27 72	28 0	29 0	30 0
Japanese	31 7	32 7	33 7	34 0	35 0	36 0
Filipino	37 8	38 312	39 320	40 0	41 0	42 0
Korean	43 8	44 40	45 48	46 0	47 0	48 0
Laotian	49 2	50 0	51 0	52 0	53 0	54 0
Vietnamese	55 3	56 49	57 52	58 0	59 0	60 0
Other Asian (not included above)	61 4	62 59	63 63	64 0	65 0	66 0
Reporting More Than One Asian Group	67 0	68 14	69 14	70 0	71 0	72 0
Black or African American	73 4	74 93	75 97	76 0	77 0	78 1
Native Hawaiian or Other Pacific Islander	79 0	80 5	81 5	82 0	83 5	84 5
Native Hawaiian	85 0	86 0	87 0	88 0	89 0	90 0
Guamanian	91 0	92 0	93 0	94 0	95 0	96 0
Samoan	97 0	98 1	99 1	100 0	101 0	102 0
Other Pacific Islander (not included above)	103 0	104 4	105 4	106 0	107 3	108 3
Reporting More than one Native Hawaiian or Pacific	109 0	110 0	111 0	112 0	113 0	114 0
White	115 246	116 1,403	117 1,649	118 5	119 101	120 106
2. Household Contacts Who Marked Two Races						
American Indian or Alaska Native and White	121 0	122 1	123 1	124 0	125 1	126 1
Asian and White	127 0	128 10	129 10	130 0	131 0	132 0
Black or African American and White	133 0	134 0	135 0	136 0	137 0	138 0

5. NPrinting Logo

Logo Formatting:

- Alignment: Left and Center
- Height: 0.36"
- Width: 1.3"
- 125 by 34 px
- Location at cell A1
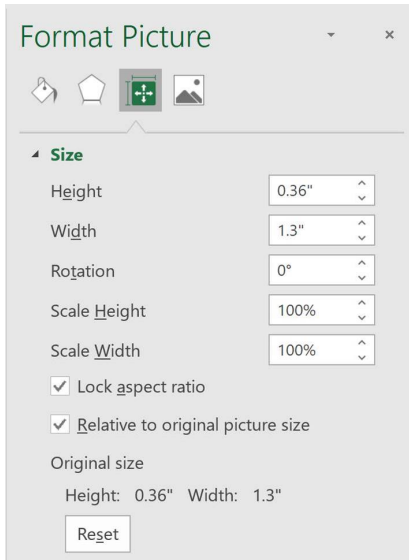
6. NPrinting Header Title Formatting

Font:

- Type: Calibri and Bold

- Size: 22
- Row Height: 28.5 (auto fit to height of font size)
- Column Width: 18.86

Alignment:

- Left and Center
- Location: Start at B1
- Merge cells to expand to the amount of cells to view the main headers
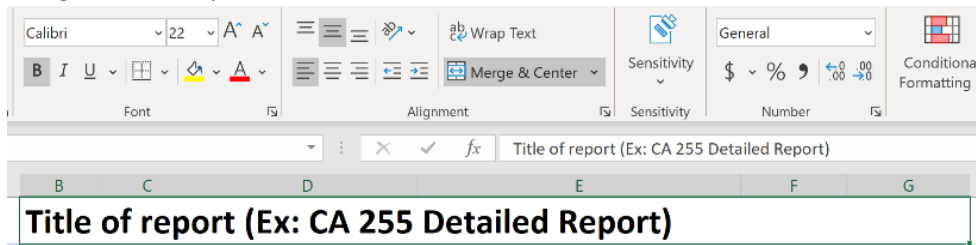
7. NPrinting Header Subtitle Formatting

Formatting for "Scheduled" reports headers will only include the following report dates (*see image below*):

- Row 2 → <County Name> (**Note**: County Name is listed without preceding label)
- Row 3 → Run Date: <Report Generation Date>
- Row 4 → Date: <Report Period>
  - o   Important: Scheduled reports will not include Begin Date and End Date
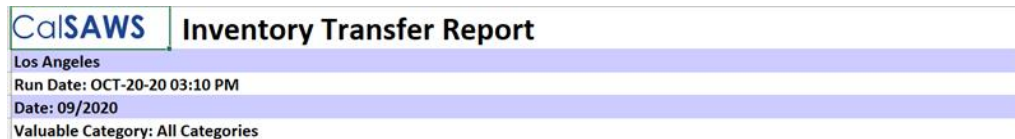
Font:

- Type: Calibri and Bold
- Size:12

Row Height:

- Auto fit to height of font size

Alignment:

- Bottom and Left
- Location: Row A2 for county name, Row A3 for Run Date and Row A4 for Report Period
- Merge Across to expand the cell headers across the report detail section
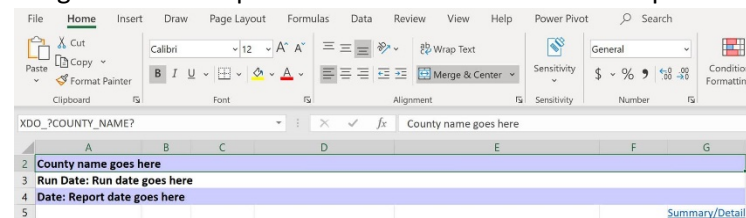
8. Detail Data

Formatting for all data within the Detail Section of each report

- Column Headers should be set to Calibri Bold Size 12
- Detail Data should be set to Calibri Size 12
- Alignment
  - Top left for text – Dimensions and/or Attributes (descriptions, names, case numbers...)
  - Top right for values and measures (calculations, amounts, …)
    Note: the data types on the dimensions should not be taken into consideration as some dimensions in nature have int, bigint.
- Word-wrap is disabled by default but may be enabled to aid in readability in some cases.
- There is no set standard for the required width or height of a cell other than it be wide enough and tall enough to comfortably display content.
  - Minor variations in size should not hinder the consumption of the report and thus should not be considered defects.
- There may be small differences in hue or color of certain text
  - An effort will be made to leave text as the default colors per Excel, but minor variances between versions may occur.

9. Sorting of Case Numbers

Natural sorting will be applied to the Case Numbers where basically Qlik looks at it as Character Alphanumeric value. When natural sorting happens on a character value it looks at the first block of values in characters or numeric and the sorting begins in ascending order as the sorting order will be set on Auto.

For example, the values LA019 vs. LA11 the second one will be sorted first or another example of a set of alphanumeric values L0C1111, L0C1111, L0CA222 will be order in ascending based on the block values of alpha or numeric. The natural sorting will view the order as alpha then numeric then alpha then numeric.

In the example below the value of TO71C16 is sorted in this position due the fact that natural sorting looks at the first alpha block of – T – then the numeric value of – 071 - as the second block.

T00E751
T00E751
T561802
T561802
T656177
T656177
T071C16
T071C16
T03FBD8

10. Report on-open default focus location

When open any sheet in the report the default focus location for all sheets should be cell A1
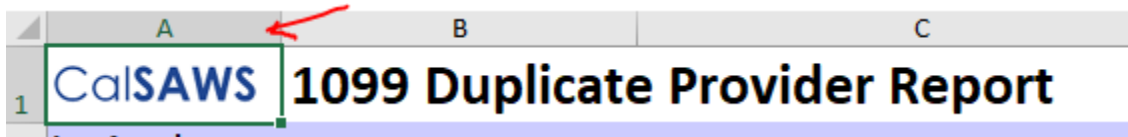
IMPORTANT: This should be applied to all reports and going forward starting on Release H as of 5/17/2020

11. Report date subtitle

The report date should match to the legacy report subtitle with its corresponding naming depending on the report date as either Report Month, Report Week, Report Date or any other date subtitle from the original OBIEE excel template of the legacy report.
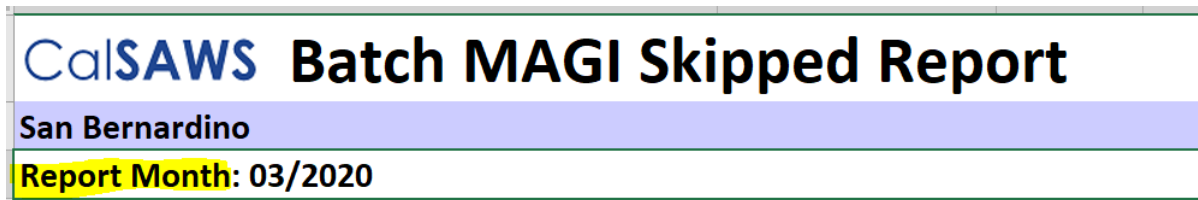
12. Complex formulas in excel

Complex and macro formulas in excel to manage dynamic totals or other calculations will be limited to excel limitations and functionality.

Release C Summary

Soft Launch Date 3/30/2020
Hard Launch Date 10/19/2020

Dashboards	Reports
CalWORKs	*None*
QA - Errors	

CalWORKs - Pending Applications Dashboard

Per County request chart colors for *CalWORKs Application Pending by Length of Time* were customized to show *226+ Days* value in red

Per County request data order was modified to following order:

31-45 Days, 46-60 Days, 61-90 Days, 91-135 Days, 136-180 Days, 181-225 Days, 226+ Days, Rescinded

CalWORKs - Specialized Supportive Services Dashboard

Per County request, *# Mental Health/Substance Use Disorder Cases Over 90 Days by Reason* bar chart was customized to force display a specific number of bars so that more offices showed at once on smaller screens/lower DPI.
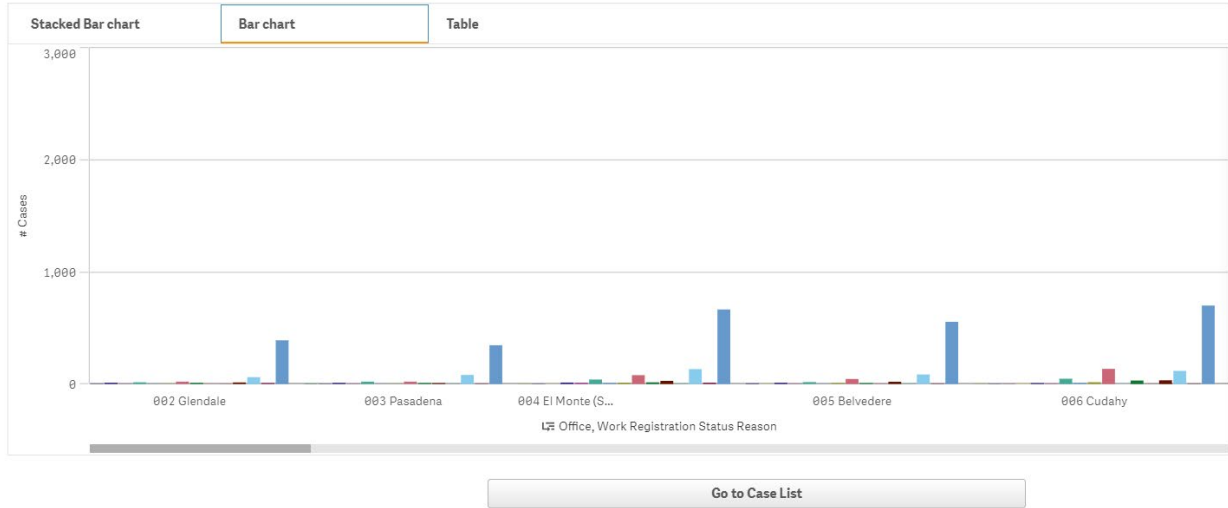
Per County request, interactive table was added to *# Mental Health/Substance Use Disorder Cases Over 90 Days by Reason* to display more legend values than Qlik allows:
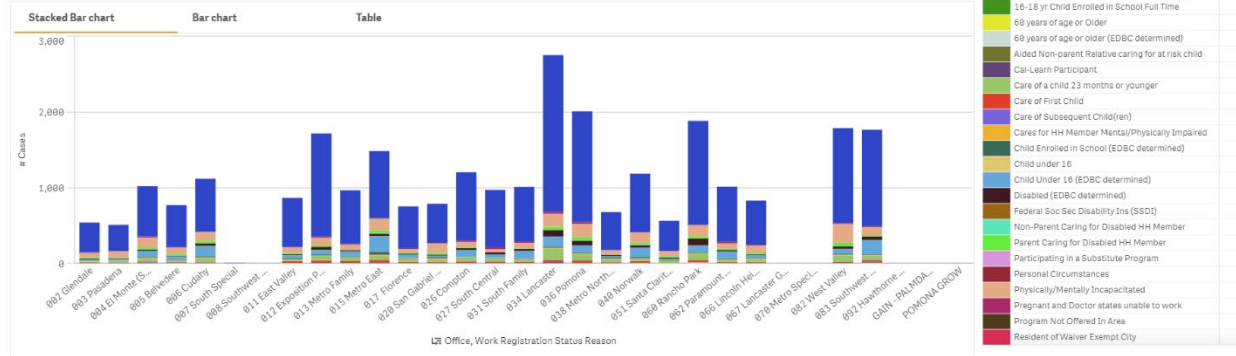
Release D specific Release Notes

Release D Summary

Soft Launch Date 6/30/2020
Hard Launch Date 10/19/2020
On-Request Reports can be found in the following document: "On Request Reports Replatform Release Summaries"

Dashboards	Scheduled Reports
CalFresh	1099 Duplicate Provider Report
CalFresh Meals	Aid Code Inter and Intra Program Transfer Report
Caseload Characteristics	Balderas Telephone Contact Report
Organizational Hierarchy	Batch MAGI Skipped Report
SSI/SSP	Batch RE Mixed Household Exception Report
	CA 237 CW
	CA 237 CW Line 8 Backup Report
	CA 237 KG-S
	CA 237 KG-F
	CA 253
	CA 255
	CalFresh Disaster Services Daily Report
	CalFresh EBT Production Reconciliation Report
	CalFresh EBT Repayment Report (Daily)
	CalFresh Supplemental Issuance Register
	CalHEERS Horizontal Integration Detail Report
	CalWORKs Caseload Backup Report
	CalWORKs Caseload Report
	Cash EBT Production Reconciliation Report
	Cash EBT Repayment Report (Daily)
	Child Care Former Recipient Report
	Child Care Manual Issuance Register
	Child Care Warrant Issuance Register
	Collections Benefit Grant Adjustment Cause Code Report
	Collections Benefit Grant Adjustment Monthly Report
	Collections Receipt Daily Report
	Collections Receipt Monthly Report
	Direct Deposit Transmittal Register
	Integrated Child Care Service Payment Detail Claiming Report (Daily)
	Integrated Child Care Service Payment Detail Claiming Report (Monthly)
	MAGI Discontinuance Report
	MAGI Error Report
	School Lunch Report

Caseload Characteristics Dashboard

The Caseload Characteristics (Geocoding) dashboard is a single Qlik app with multiple sheets, one for each geographical representation of data. All sheets contain similar data objects and layout with different geographical attribute applied to each sheet. The sheets included in this dashboard are below:

- Caseload Characteristics by Service Planning Area
- Caseload Characteristics by State Senate District
- Caseload Characteristics by Congressional District
- Caseload Characteristics by Assembly District
- Caseload Characteristics by City
- Caseload Characteristics by Zip Code
- Caseload Characteristics by District Office
- Caseload Characteristics by Supervisorial District

The following release notes will apply to similar visualization objects repeated on every sheet (with exception of *Age & Gender* and *Citizenship, Ethnicity, & Language*)

Color Scheme for Table Charts

Color formatting features originally in OBIEE are not available in the current version of Qlik Sense. Therefore, in each chart there is no color coding for each program title and rows are not displayed in alternating colors.

OBIEE:

Age of Active Persons	Total Active Persons				
	CAPI	CalFresh	CalWORKs	General Relief	Medi-Cal
Under 1		291	149		384
1-2		915	504		1,072
3-5		1,609	862		1,877
6-12		4,275	2,182		4,984
13-15		1,695	887		2,132
16-17		972	497		1,394
18		438	102	4	833
19	1	280	16	10	813
20		234	15	9	739
21-59	6	5,634	641	302	17,380
60-65	2	771	6	33	1,440
Over 65	33	1,092	2	4	1,969
Total	42	18,206	5,863	362	35,017

Qlik Sense:

Total Active Persons by Age

Age of Active P...	Program				
	CAPI	CalFresh	CalWORKs	General Relief	Medi-Cal
Total	**42**	**18,206**	**5,863**	**362**	**35,017**
1-2	-	915	504	-	1,072
3-5	-	1,609	862	-	1,877
6-12	-	4,275	2,182	-	4,984
13-15	-	1,695	887	-	2,132
16-17	-	972	497	-	1,394
18	-	438	102	4	833
19	1	280	16	10	813
20	-	234	15	9	739
21-59	6	5,634	641	302	17,380
60-65	2	771	6	33	1,440
Over 65	33	1,092	2	4	1,969
Under 1	-	291	149	-	384
Unknown	0	0	0	0	0

Chart Titles and Chart Layout Display

Qlik Sense will display chart titles in a different location than was previously displayed in OBIEE, which contains more descriptive column headers with no chart title shown. Minor changes were made to titles in some cases to show greater description of charts within Qlik Sense. Depending on the chart, tables will be displayed as straight tables or pivot tables.

OBIEE:

Citizenship Status of Active Persons	Total Active Persons				
	CAPI	CalFresh	CalWORKs	General Relief	Medi-Cal
Citizen		15,127	5,141	274	20,474
Legal Immigrants	37	1,153	94	36	3,999
Others	0	8	5	0	55
Undocumented Immigrants					7,035
Total	37	16,288	5,240	310	31,563

Qlik Sense:

Total Active Persons by Citizenship Status

[Citizenship Stat...	Program				
	CAPI	CalFresh	CalWORKs	General Relief	Medi-Cal
Total	**37**	**16,288**	**5,240**	**310**	**31,563**
Citizen	-	15,127	5,141	274	20,474
Legal Immigrants	37	1,153	94	36	3,999
Others	0	8	5	0	55
Undocumented Immigrants	-	-	-	-	7,035

Rows with Multiple Attributes

Format and the display of columns is different within Qlik Sense when displaying multiple row attributes within the same chart. Qlik also displays *Total* at top of chart instead of bottom as displayed in OBIEE.

For *Age Group and Gender of Active Persons* chart, OBIEE will display the multiple row attributes Age and Gender side by side and total will be displayed at bottom:

The equivalent attributes in Qlik Sense will be displayed as a single column and total will be displayed at top of chart:

Known Issues

CA-216912: ODI does not calculate age correctly and has some duplicate values

ODI Geo Coding Age logic was updated to use the difference between last day of report month and date of birth, instead of system date - date of birth. Using the system date results in incorrect age calculation for the monthly report values.
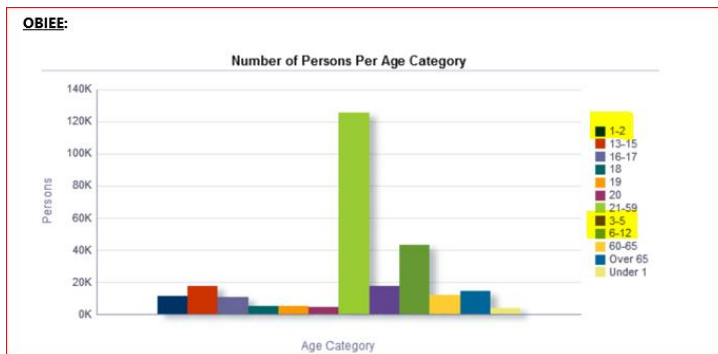
Additionally, the ETL logic was updated to fix a duplicate issue that was causing miscalculation in the Geo Coding Age logic.

Status: Test Complete

Targeted Release: 20.07

OBIEE displays age legend out of order

Legend for persons by age category on some of the sheets in OBIEE are listed out of order

Qlik will have these listed in order:

Qlik:

Small amounts do not show up in OBIEE bar chart

On Caseload Characteristics - Service Planning Area Sheet - Ethnic Origin of Active Persons, the pacific islander amount does not show up in OBIEE bar chart due to a scaling limitation in OBIEE. This is also the case for Number of Cases per Language where Qlik shows Farsi, but OBIEE doesn't.
Status: Tool limitation
Targeted Release: N/A. This is a limitation of the OBIEE tool.

SCR CA-217740/ AN – 6455: Age Group by Gender Tables delta

In OBIEE:

Per current design, the gender chart only shows counts for male or female gender in the age group by gender table chart. However, the total line for this chart display the count for all persons in this program regardless of gender. For example, in the OBIEE chart below there is 1 person in Medi-Cal that is not identified as male or female. That person is excluded from the counts for male/female in that column for adults and children but is included in the total line at the bottom. This results in the line items not adding up to the total line item for Medi-Cal.

Age Group of Active Persons	Gender of Active Persons	CAPI Persons	CalFresh Persons	CalWORKs Persons	General Relief Persons	Medi-Cal Persons	Refugee Persons
Adult	Female	548	42,117	3,479	1,034	116,351	6
	Male	357	27,631	1,083	1,344	85,661	12
Child	Female	2	22,331	8,759		44,132	
	Male	5	22,955	8,798		45,952	
Total		**912**	**115,034**	**22,119**	**2,378**	**292,097**	**18**

In Qlik, the Total active persons by age and gender table chart matches OBIEE for the line item counts of adult female, adult male, child female, and child male, for each set of programs. However, the total count listed in this chart only adds up those values and does not include a gender not displayed on this chart in the total count line on Total Active Persons by Age and Gender.

Status: SCR submitted (CA-217740)
Targeted Release: TBD

CA-217636 / AN-6599: OBIEE Service Planning Area filtering unknown gender from all chart totals

Caseload Characteristics by Service Planning Area – OBIEE is filtering out gender values that are not either male or female from all totals in all charts on this dashboard.
Status: Test Complete
Targeted Release: 20.07

CA-217569/AN – 6456: Number of Cases per Language Chart incorrect counts

Caseload Characteristics - all Dashboards/sheets - Number of Cases per Language Chart is incorrect in OBIEE.
Status: Test Complete
Targeted Release: 20.07

CA-217623/AN – 6457 Average Age of Active Adults count incorrect

On both Caseload Characteristics - District Office - Average Age of Active Adults table and Caseload Characteristics - City - Average Age of Active Adults table, OBIEE is showing averages under adult age.
Status: Test Complete
Targeted Release: 20.07

Managed Personnel – Organizational Hierarchy Dashboard

Table layout
The Qlik Sense straight table chart will not display the merged cell format. It will display distinct rows for each value.

OBIEE:

Qlik Sense:

Office Level	Section Level	Unit Level	Worker Level	Auto Assign	Assign Type Code	Task Program Code
002 Glendale - DI	#2 Adm Section - DP	Unit Name Unassigned - SU Unassigned		No	No Assign Type	No Tasks
002 Glendale - DI	#2 Adm Section - DP	Unit Name Unassigned - SU Unassigned		No	No Assign Type	No Tasks
002 Glendale - DI	#2 Adm Section - DP	Unit Name Unassigned - SU Unassigned		No	No Assign Type	No Tasks
002 Glendale - DI	#2 Adm Section - DP	Unit Name Unassigned - SU Unassigned		No	No Assign Type	Homeless - Perm

Release E specific Release Notes

Release E Summary

Soft Launch Date 9/30/2020
Hard Launch Date 2/22/2021
On-Request Reports can be found in the following document: "On Request Reports Replatform Release Summaries"

Dashboards	Scheduled Reports
Scorecard	CF 296
Program Assignment	CF 296 Line 6 Backup Report
Medi-Cal	Changed Payee Address and EBT Card Audit Report
AAP (CWS)	Collections Integrated Monthly Report
Kin-Gap (CWS)	Collections Program Cause Code Report
Foster Care (CWS)	Collections Reason Code Monthly Report
General Relief	CW 115
Managed Personnel	CW 115 - C-IV Version
	CW 115 A
	CW 115 A - C-IV Version
	Daily Claiming Adjustment Report
	DFA 256
	DFA 256 Detailed Report
	DHCS CMS Performance Indicator Master Data Request Detailed Report
	DHCS CMS Performance Indicators Master Data Request
	DHCS Renewals Master Request
	DHCS Renewals Master Request Detail
	Direct Deposit Production Reconciliation Report
	DPA 266
	DPA 266 Backup Report
	DPA 482
	DSS 466
	Duplicate Aid Report
	Excess Recoupment Report
	Excessive Manual/Special Payment Audit Report
	Excessive Rescind Audit Report
	Excessive Retro Payment Report
	FNS 209
	FNS 209 Line 3b Backup Report
	Inactive Programs with Outstanding Overpayments Report
	Integrated CalFresh Issuance Detail Claiming Report
	Integrated Payroll Benefit Issuance Detail Claiming Report
	Integrated Payroll Benefit Issuance Detail Claiming Report By Case
	Integrated Service Payment / Valuable Detail Claiming Report (Daily)
	Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
	Inventory Transfer Report
	Issuance Exception Report
	LIHEAP/SUAS Benefit Issuance Register (Daily)
	LIHEAP/SUAS Benefit Issuance Register (Monthly)
	LIHEAP/SUAS Benefit Production Reconciliation Report

	Main Payroll Benefit Direct Deposit Production Reconciliation Report
	Main Payroll Benefit EBT Production Reconciliation Report
	Main Payroll Benefit Issuance Direct Deposit Summary
	Main Payroll Benefit Issuance EBT Register
	Main Payroll Benefit Issuance EBT Summary
	Main Payroll Benefit Issuance Warrant Register
	Main Payroll Benefit Issuance Warrant Summary
	Main Payroll Benefit Warrant Production Reconciliation Report
	Main Payroll CalFresh EBT Production Reconciliation Report
	Main Payroll CalFresh Issuance Register
	Main Payroll CalFresh Issuance Summary
	MEDS Reconciliation Alerts Report
	MEDS Weekly Alerts Detailed Report
	Outstanding Collection Balance Report
	Outstanding Eligibility Determination Request Report
	RDB Provider Referral Report
	Recovery Account Transaction Report
	Rush Child Care Warrant Register
	San Bernardino Warrant Production Reconciliation Report

Release F specific Release Notes

Release F Summary

Soft Launch Date 1/15/2021
Hard Launch Date 7/7/2021
On-Request Reports can be found in the following document: "On Request Reports Replatform Release Summaries"

Dashboards	Scheduled Reports
CalWORKs/RCA Adults by Welfare-to-Work Category	ABCD 350
IEVS	CA 1037 Report
WTW/REP Activity Report	CA 237 EA
Task Management	CA 237 FC
Welfare Fraud Prevention & Investigation	CA 237 HA
	CA 800 ARC
	CA 800 CCR PIA Report
	CA 800 CCR RIA Report
	CA 812
	CalHEERS Horizontal Integration Report
	CF 358 F
	CF 358 S
	CMSP 237
	CMSP 237 Detailed Backup Report
	Daily Interface Payment Status Report
	Detailed Caseload Movement Report - Homeless Assistance
	Disaster CalFresh Daily Report
	FC1 - Continuum of Care Reform Facility Report
	Fiscal Batch Statistics Report
	GR 237 Report
	Integrated Nutrition Benefit Issuance Detail Claiming Report
	Integrated Payroll Summary Report
	Integrated Service Payment / Valuable Summary Report (Monthly)
	Integrated Service Payment / Valuable Summary Report (Quarterly)
	Main Payroll Benefit Issuance Direct Deposit Register
	Main Payroll Foster Care Issuance Summary
	Main Payroll Foster Care Warrant Production Reconciliation Report
	Nutrition Benefit EBT Production Reconciliation Report
	Nutrition Benefit Supplemental Issuance Register Report
	RS 51
	Rush Benefit Issuance Warrant Register
	Rush Service Payment Warrant Register
	Service Payment EBT Issuance Register
	Service Payment Manual EBT Issuance Register
	Service Payment Manual Issuance Register
	Service Payment Warrant Register
	Skipped Issuance Report
	SOC 808
	SOC 808 Backup Report
	STAT 45
	STAT 47
	STAT 47 Part F Backup Report

	Supplemental Benefit Issuance Direct Deposit Register
	Supplemental Benefit Issuance EBT Register
	Supplemental Benefit Issuance Warrant Register
	Supplemental Benefit Manual Direct Deposit Issuance Register
	Supplemental Benefit Manual EBT Issuance Register
	Supplemental Benefit Manual Warrant Issuance Register
	TEMP 2035 EBT THEFT - Skimming
	TEMP 2313 EBT THEFT - Scam
	Text Notification Report
	Unposted Receipt Report
	Warrant Production Reconciliation Report
	WINS 2
	WINS Benefit Issuance Register Daily Report
	WINS Benefit Production Reconciliation Report
	WINS Cert
	WTW 25
	WTW 25A

Case List Toggle Select

The Operations Reports Dashboard (CW/RCA Adults by WTW Category) case lists will be accessed differently in Qlik. They will follow the typical path with the user selecting values as they drill down and clicking on the "Go to case list" button.

In OBIEE the user will click on the value they would like to drill down to and select the "Drill to Case List" option.

CalWORKs/RCA Aided

Chart Type: Pivot Table

	Nov-20	Dec-20
Welfare-to-Work Mandatory	38,016	37,621
Welfare-to-Work Exempt	7,340	7,162
Welfare-to-Work Other	41	42

Refresh - Print - Export - Copy

CalWORKs/RCA Aided

| | Pivot table | | Stacked Bar chart |

RCA Aided Reason Q	Month Q	
	Nov-20	Dec-20
Welfare-to-Work Exempt	7,340	7,162
Welfare-to-Work Mandatory	38,016	37,621
Welfare-to-Work Other	41	42

Go to case list
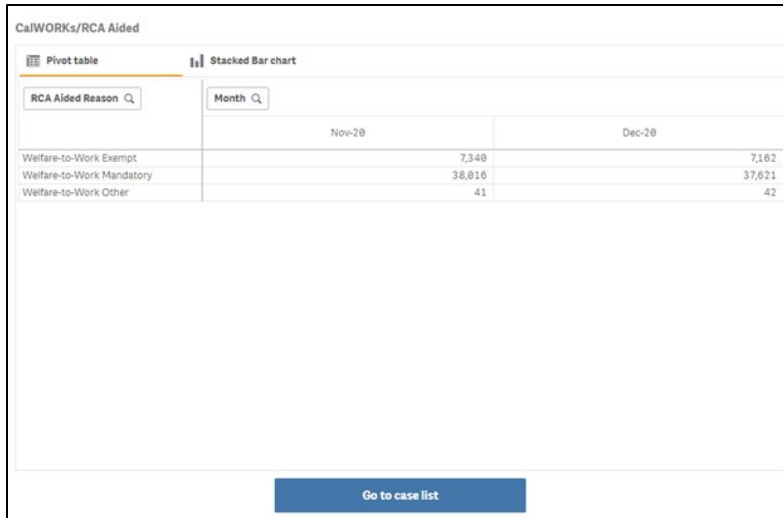
In Qlik, after the user has clicked the button and is on the case list page, they will click the filter that is above the case list table to make their selection for the correct field. The Selection criteria will correspond to the row on the month level view. The case list will update based on the selection.
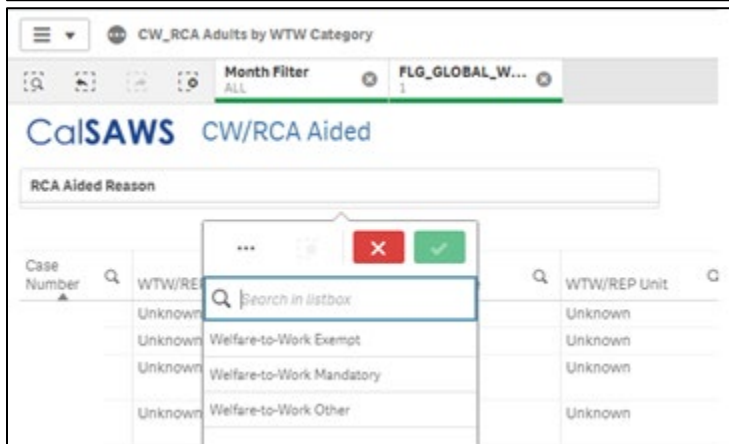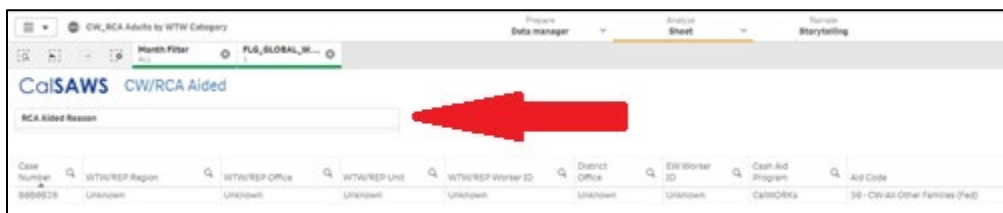
IEVS Processed Bar Chart View

The **# IEVS Processed Stacked Bar Chart** (Division level) in the **IEVS Processing tab** in the **IEVS Dashboard** in OBIEE uses an approach where multiple dimensions are show in one chart. In Qlik, this will be displayed across the two charts in the established conventional Qlik approach of a Month level chart at the top level and at a Division level in the bottom chart labeled as such. It will retain the dimensions across the chart and should be easier to view the smaller values that are not as easily visible in the OBIEE chart.

IEVS Processed

Chart Type: Stacked Bar Chart

Legend:
- 01, Processed more than 45 Days
- 02, Processed more than 45 Days
- 03, Processed more than 45 Days
- 04, Processed more than 45 Days
- 06, Processed more than 45 Days
- Unknown, Processed more than 45 Days
- 01, Processed within 45 Days
- 02, Processed within 45 Days
- 03, Processed within 45 Days
- 04, Processed within 45 Days
- 06, Processed within 45 Days
- Unknown, Processed within 45 Days

Calendar Month Name is equal to Jan-21, Dec-20, Nov-20, Oct-20, Sep-20, Aug-20

Return - Refresh - Print - Export - Create Bookmark Link - Copy

The Division level will continue to show the Division value on the x axis and the stacked bar will display the # processed more than 45 days and those Processed within 45 days

IEVS Processed (Division Drill Down)
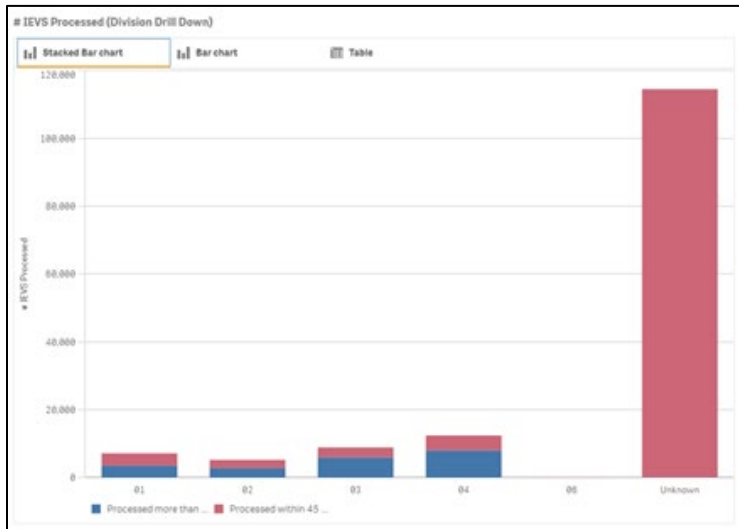
Release G specific Release Notes

Release G Summary

Soft Launch Date 3/31/2021
Hard Launch Date 7/7/2021
On-Request Reports can be found in the following document: "On Request Reports Replatform Release Summaries"
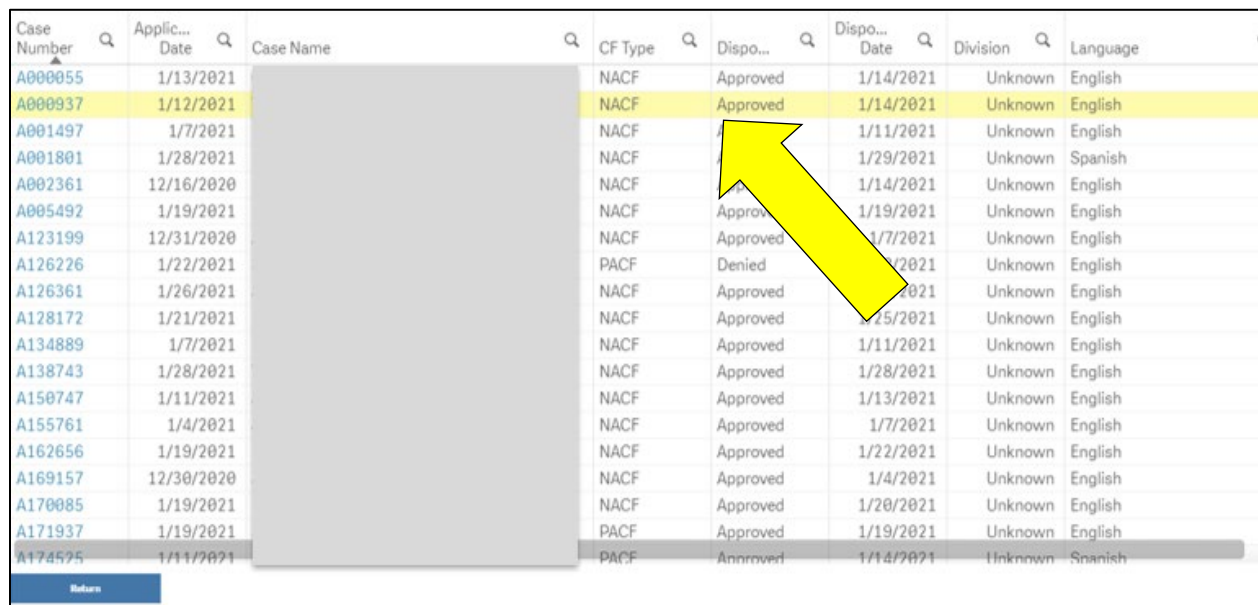
Dashboards	Scheduled Reports
Reception Log	Integrated Payroll Foster Care Issuance Detail Claiming Report
	Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
	Issued Valuable Inventory Report
	Medi-Cal Caseload Line 13 Backup Report
	Medi-Cal Caseload Line 6 Backup Report
	Medi-Cal Caseload Report
	RDB Contract Fiscal Claiming Report
	Release Note Report
	Valuable Inventory Report

Case List Line Hover Functionality – New Functionality

When viewing a Case List in QLIK, when the user hovers the mouse over a row in the Case List, the row will highlight in 'yellow'.

Dashboard "Return" Button Functionality

When the user clicks the "Return" button at the bottom of the screen, the user will return to the main dashboard page with all the filters previously selected cleared.

QLIK ID Column Update

When viewing the Case List, there was a column labeled "ID". This column has been updated to be displayed as "Qlik ID" as this number is specific to QLIK and how the record is identified in QLIK.

Reception Log Links

When accessing the Reception Log Dashboard from the landing page, there will now be 3 links available to select instead of 1.

The user can also access the other dashboards via buttons at the top of each of the Reception Log Dashboards. The button links will display on all the Reception Log Dashboards.

Data extracted daily as of: 6/2/2021 11:29:28 PM

| Reception Log - Historical | Reception Log - County View | Reception Log - Office View |

📅 Select date range ▼

Office

Reception Source

Reset

Number of Visits & Avg Wait Time Per Day

200

1.00

■ # of Visits

— Average Wait Time (in minutes)