

Qlik Replatform Release Summary

On Request Reports

On Request Reports Replatform 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 (Key Performance Indicator)
 - 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	8097	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	1683219	629283	92562	1291124
CalWORKs	968461	622654	115893	185926	284778	34895	312148
CAPL	39495	14941	782	5615	5243	619	12754
CDET	53459	0	0	6	592	0	68612
Child Care	386998	63872	0	35537	33851	4	160451
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 only the filter values that have data will be seen
 - iii. 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 within Qlik cells appear as '-' and not as blank spaces.
3. Zeros will appear as zeros and not as blank spaces.
4. Excel exports cannot exceed 1 million records as this is an Excel limitation. It is recommended user will apply further filtering to reduce the size of the output.
5. Excel exports are non-formatted and to a single tab. Users will 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.

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 by right-clicking on the body of the metric, table, or case list, then select "Dynamic Chart" > "Download as" > "Data" (see example below).

Batch Eligibility Report

County: Los Angeles | Status: All | Program: CalWORKS | BegDate: 08/26/2021 | EndDate: 08/30/2021 | Office Name: 002 Glendale | Office Type: District

CalSAWS Detail

Data Extracted Daily As Of: 08/30/2021

Return to Selections

Worker ID	Case Number	Case Name	Program	Benefit Month	Batch Process Date
19DP02R0C96	B1F2Q77		CalWORKS	09/01/2021	08/26/2021
19DP02R0C96	B1F2Q77		CalWORKS	10/01/2021	08/26/2021
19DP021S93	B1QLP65		CalWORKS		08/26/2021
19DP021S93	B1QLP65		CalWORKS		08/26/2021
19DP021S93	B1YW520		CalWORKS		08/26/2021
19DP021S93	B1YW520		CalWORKS		08/26/2021
19DP021S93	B158989		CalWORKS		08/26/2021
19DP021S93	B158989		CalWORKS		08/26/2021
19DP021S93	B189901		CalWORKS		08/26/2021
19DP021S93	B189901		CalWORKS		08/26/2021
19DP021S93	B189901		CalWORKS		08/26/2021
19DP021S93	L1DBC95		CalWORKS		08/26/2021
19DP021S93	L1DBC95		CalWORKS		08/26/2021
19DP021S93	L1DBC95		CalWORKS	09/01/2021	08/27/2021
19DP021S93	L1DBC95		CalWORKS	09/01/2021	08/27/2021
19DP021S93	L1F74A5		CalWORKS	09/01/2021	08/27/2021
19DP021S93	L1F74A5		CalWORKS	10/01/2021	08/27/2021

- The Excel export will be into a single tab and will not have formatting; including only the column header row and data, as well as a generic file name (see example variance below).

OBIEE

Activity Report 8-17-2021 113151.xls

Activity Report

Los Angeles

Run Date: AUG-17-21 11:30 AM

Organization: COUNTY Los Angeles

Program: Welfare to Work

Date: 08/10/2021 - 08/17/2021

Total:		15,488	683	338	5	547	2	5	113	13	21	0		
		Active			Completed			Closed						
Worker ID	Case Number	Activity Type	Active Carried Forward	Refer	Atten	Empl	Success	Ddn	Interrupt	NoSho	Reschd	Trans	LD	Unsat
19DP022D22	B1Y5631	Employment	Y											
19DP131A1Y	B23W440	Employment	Y											
19DP171H08	B18J94	Family	Y											

Qlik

bfb690e-d433-424f-84c-d7522a362319.xlsx

Worker ID

Worker ID	Case Number	Activity Type	Active Carried Forw	Active-Refer	Active-Atten	Completed-Empl	Completed-Succes	Closed-Ddn	Closed-Interrupt	Closed-NoSh
19DP022D22	B1Y5631	Employment	Y							
19DP131A1Y	B23W440	Employment	Y							
19DP171H08	B18J94	Family	Y							
19DP265Y1V	B0XV016	Assessment	Y							
19DP265Y1V	B0XV016	Assessment	Y							
19DP26610G	B1JHM78	Employment	Y							
19DP26A601	B1C6Z00	Domestic Violence	Y							
19DP344W04	B06CQ09	Employment	Y							
19DP345Y1Z	B0NW484	Employment	Y							
19DP627D2R	B0W8198	Employment	Y							
19DP825Y2F	B1U7R70	Employment	Y							
19ESGN1800	B051603	Job Skills Training	Y							
19ESGN1800	B0VY193	Employment	Y							
19ESGN1800	B0WBD80	Employment	Y							
19ESGN1800	B0WGN58	Employment	Y							
19ESGN1800	B0WMB27	Paid Work Experie	Y							
19ESGN1800	B16C689	Voc/Ed Training	Y							
19ESGN1800	B16C689	Community Service	Y							
19ESGN1800	B17X968	Paid Work Experie	Y							
19ESGN1800	B183H64	Paid Work Experie	Y							

5. This behavior is as per Qlik Dashboard product

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. Supported Browsers

3. Qlik supports the following browsers
 - a. Google Chrome
 - b. Microsoft Edge
 - c. Mozilla Firefox
 - d. Internet Explorer (not recommended as it will no longer be supported by Microsoft)
 - i. 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

7.Release F Specific Release Notes

Release Summary

Soft Launch Date 1/15/2021

Hard Launch Date 7/7/2021

On Request reports
Application Activity Report
Child Care Delinquent Approvals Report
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

8.Release G Specific Release Notes

Release Summary

Soft Launch Date 3/30/2021

Hard Launch Date 7/7/2021

On Request Repots
1099 Reconciliation Report
Caseload History Report
Employment Services Customer Reporting Report
RE Date Report

9.Release H Specific Release Notes

Release Summary

Soft Launch Date 6/30/2021

Hard Launch Date 9/15/2021

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 <ul style="list-style-type: none"> 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