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Posted By : Kailash Kumawat
D109
Date & Time : 05-07-2016 10:17:AM
point no. 10

New module for custom report.
only superadmin can create report,
it is not good to give this option to supervisor.
all reports created by this module will be shown to all supervisors(in current system all rights are designation based).
If you have any doubt in above process let me know.
Posted By : Navika Desai
D109
Date & Time : 05-07-2016 11:05:AM
What is the proposed flow and output? What will be the module design and interface?

Posted By : Kailash Kumawat
D109
Date & Time : 05-07-2016 11:16:AM
you can see in excelsheet, screens are also confirmed by you.
it is for customized reports for cases data. related with particular client, activity, product, location.
Posted By : Navika Desai
D109
Date & Time : 05-07-2016 07:23:PM
Supervisors need to have the option for extracting report as per the client or process requirement.
Reports shown to all supervisors are ok, but on clicking the data to be provided only as per the employee rights assigned to that Supervisor.

In the excel i had mentioned - Sub menu not to be created for each report, the report name will be just a list as

hyperlink and the software will navigate to that report page on clicking
Please ensure this.
Posted By : Kailash Kumawat
D109
Date & Time : 06-07-2016 06:45:PM
1) Reports will be created by superadmin only. Is it OK?
2) supervisor will see all reports created by superadmin, they can click on reports and will see reports filter set
by admin. Is it OK?
3) they can search case data from given filters
filters are fixed(below),
Zone
center
subcenter
Client
Acitivity
Product
date range(by case create_date)
Approved by you on given screens.Is it OK?
4) Analytical reports are not possible like counting of cases.(it was discussed)
user filter data for cases and download reports. is it OK?
Posted By : Navika Desai
D109
Date & Time : 07-07-2016 09:54:AM
1) No. Supervisor need to have option for creating report.
2) Supervisor should be able to create report. Hence this is not applicable.
3) Date filters as per create date & send to client date (either or both).
4) ok

Posted By : Kailash Kumawat
D109
Date & Time : 08-07-2016 10:02:AM
Supervisor can not create report and it was discussed and it was confirmed by you.
module is uploaded as per discussion.
supervisor don't know fields from field master , so how will create report.
supervisor know templates fields showing in web-form,
There is no relation of templates with these reports.
Screens was confirmed by you in excel sheet.
If you need supervisor to create report then it must be main template wise reports.
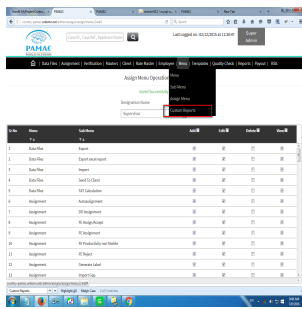and you need to train supervisors, what are main templates , because they can not see any template design related
modules?
supervisor first select main template and then create reports. it is altogether a new requirement.
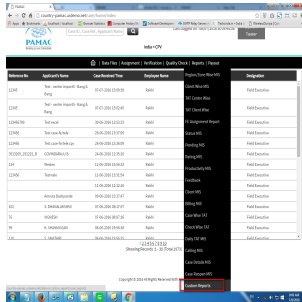We created custom reports as per discussion.
If you need supervisor to create report then add new requirement and we need to discuss flow again. It is really
difficult to work with you because you change requirement after completion of module, everything was
discussed with you and confirmed now you are changing.

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admin link

[↓ Download]

user link

Posted By : Navika Desai
D109
Date & Time : 12-07-2016 05:53:PM
The above mentioned development has been tested ok on country demo. However on clicking the report hyperlink, the reports is downloaded on screen directly, this has to show data only on searching and not default. Can we have any other field for date picker other than added date? Can that option be made dynamic?

Posted By : Super Admin
D109
Date & Time : 14-07-2016 10:06:AM
Ok, we are doing only following

>> The above mentioned development has been tested ok on country demo. However on clicking the report hyperlink, the reports is downloaded on screen directly, this has to show data only on searching and not default. Can we have any other field for date picker other than added date? Can that option be made dynamic?
Posted By : Rakhi Gaud
D109
Date & Time : 15-07-2016 05:07:PM
Added date is fixed date field. We can manage other date fields also but it needs additional time.
And also the fields will be predefined and fixed in coding.
Posted By : Navika Desai
D109
Date & Time : 15-07-2016 05:21:PM
How much additional time?

Additional date fields would be send to client date and Fe submit date
Posted By : Rakhi Gaud
D109
Date & Time : 15-07-2016 05:38:PM
It will take 1 day.

Posted By : Navika Desai
D109
Date & Time : 15-07-2016 07:18:PM
Please implement that change with one additional day and make a note of this in task list.
Posted By : Rakhi Gaud
D109
Date & Time : 18-07-2016 08:58:AM
all 3 date fields will be visible in report page.
1. Created Date
2. Send to client date
3. Fe submit date
Posted By : Navika Desai
D109
Date & Time : 18-07-2016 10:47:AM
okay
Posted By : Rakhi Gaud
D109
Date & Time : 18-07-2016 05:56:PM
Done with the changes discussed above.

User should select atleast one date range.
Export button will be enable after search.
Bydefault there will be no record visible.

Please check and confirm.

Posted By : Super Admin
D109
Date & Time : 25-07-2016 09:44:AM
waiting for confirmation ...
Posted By : Kailash Kumawat
D109
Date & Time : 28-07-2016 02:47:PM
waiting to conclude this point from pamac side.
Posted By : Super Admin
D109
Date & Time : 28-07-2016 02:54:PM
why its taking so long?
Posted By : Navika Desai
D109
Date & Time : 28-07-2016 04:35:PM
Busy with other tasks and points,
Posted By : Navika Desai
D109
Date & Time : 01-08-2016 01:06:PM
The changes done by rakhi for added date, fe submit date and send to client date have been tested ok.

Can we move the Custom reports add/edit/ delete menu under report creation only? As it is one type of report.
Can we add the name of the report on the top as page heading for the specific report page?
How much time will this take?

W Custom reports.docx

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Posted By : Super Admin
D109
Date & Time : 02-08-2016 03:29:AM
Thanks for answer ... some times same is situation at our end.
We hope your kind enough to understand that.

ShimBi Team proceed
Posted By : Rakhi Gaud
D109
Date & Time : 02-08-2016 11:54:AM
Hi Navika,

It will take one day for changes and testing on demo site.
Posted By : Navika Desai
D109
Date & Time : 02-08-2016 12:18:PM
Can we move the Custom reports add/edit/ delete menu under report creation only? As it is one type of report.
Can we add the name of the report on the top as page heading for the specific report page?
This is not required.

Please upload the remaining changes on live.
Posted By : Rakhi Gaud
D109
Date & Time : 09-08-2016 09:31:AM
Going to upload this point on live site today.
I will update once done.
Posted By : Rakhi Gaud
D109
Date & Time : 09-08-2016 04:04:PM
Uploaded this point on live.
Please verify and confirm.
Posted By : Navika Desai
D109
Date & Time : 10-08-2016 12:19:PM
Test report 1 has been added in custom reports. But page goes blank on selecting the report.

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[w] D109.docx
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Posted By : Navika Desai
D109
Date & Time : 18-08-2016 03:02:PM
Update?
Posted By : Rakhi Gaud
D109
Date & Time : 30-08-2016 11:07:AM
There was error in some model function. Now I have replace that function with other function and issue is resolved.

Please verify now.
Posted By : Navika Desai
D109
Date & Time : 30-08-2016 06:09:PM

For test report 1, i selected fe submit date for Order by section, but the MIS report is still sort by Case id.

Please resolve or rectify if my understanding is incorrect.

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[x] report (10).xls
[⇩ Download]
Posted By : Rakhi Gaud
D109
Date & Time : 31-08-2016 11:09:AM
Yes, there was an issue in order by fields. Condition was not added for this.
Now rectified it.
Order field will sort the records in descending order.
Please verify.
Posted By : Navika Desai
D109
Date & Time : 31-08-2016 01:31:PM
Sort by order is rectified.

Another issue -
- Test report 1 is for PD activity only
- Test Sup (P127) has Delhi < Delhi sub center rights for PD & other rights as per screen shot
- After test sup login, activity proceeded was CPV and Custom report - test report 1 was searched. Added date:1Sep15 to 31Aug 16; Fe submit date: 1Aug16 to 31 Aug 16.
- Report result showed cases of all centers

Screen shots and reports attached.

Did i do something incorrect here that is not as per discussion?

[📦] Custom report.zip
[⇩ Download]
Posted By : Rakhi Gaud
D109
Date & Time : 02-09-2016 04:40:PM
Resolved above mentioned issues.
Please verify.
Posted By : Navika Desai
D109
Date & Time : 02-09-2016 06:35:PM
As discussed on skype, checked okay.
Posted By : Kailash Kumawat
D109
Date & Time : 16-09-2016 11:59:AM
Question is closed.
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