

USAID | DELIVER PROJECT MIS R3.0 Release Notes

Product:	USAID DELIVER PROJECT MIS
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Table of Contents

MIS Features 2
Features Not Included in Release 3.0 2
Known Issues Related to ORION 3
Known Issues Related to the MIS Website..... 3
Enhancements/Things to Note 5

MIS Features

ORION v. 10.4.5 with JSI Customization 3.0
Data Warehouse v. 1.0
USAID DELIVER PROJECT website v. 2.0
CPT NEWVERN v. 16.3

Features Not Included in Release 3.0

Shipping notes database and reports on the website.	R. 3.1
Freight Rate Calculation	R. 3.1
Excel exports for all reports	R. 3.1
ORION reports for supply operations	R. 3.1
UPS EDI (211 and 214)	R. 3.1
CPT (will be part of Demand Planning feature)	R.4.0

Known Issues Related to ORION

<p>Referential integrity not enforced ORION does not currently enforce referential integrity for fields used from master views. This may cause incomplete or missing rows in web reports. DB Checks developed to find these data issues.</p>	
<p>Field size does not match character limit in reports Orion Address1 & Address2 field sizes do not match the character limit that can print on Orion reports.</p>	#15941
<p>GRNs in inventory view Inventory view needs to include unapproved GRNs</p>	#15939
<p>Item data corrections needed The following item data corrections will be made to the ORION Product Catalog after the release of 3.0: Duofem UOM = cycle Depo-Provera UOM=vial Jadelle UOM=implant</p>	
<p>Item data corrections needed Some products listed in the item dropdown menu appear to be duplicates (although they are not) because the name is too long to display all of it. The name should be corrected so each item has a unique name.</p>	#15902

Known Issues Related to the MIS Website

<p>General Web Site</p>	
<p>Inconsistent style on admin page Inconsistent style is displayed for the Publications and Tools sub tab on the admin page. This issue affects only the admin page for content contributors.</p>	#15006
<p>Inconsistent wording On the Family Planning page the portlet title should say “Related Resources”</p>	#15302
<p>View Shipments</p>	
<p>Client field in Shipment Details pdf wraps and pushes down funding source field This problem occurs in the pdf for Shipment Details: if the client name is too long for the amount of space allowed for this field, the line will wrap and push the funding source field down to the next line, which causes the label and value of the funding source field to be misaligned.</p>	#15909
<p>Discrepancy between sorting of items on Order Details page html and pdf The Items on the Order Details page are not sorted in the same way on the html and pdf reports.</p>	#15916

<p>Discrepancy between sorting of items on Shipment Details page html and pdf</p> <p>The Items on the Shipment Details page are not sorted in the same way on the html and pdf reports.</p>	#15918
Quantity Value Summary Reports	
<p>Six-Year and Two-Year should be capitalized in flyout menu</p> <p>The flyout menu on the left hand navigation shows the Six-Year and Two-Year report titles without capitalized Y.</p>	#15808
Inventory	
<p>Handling of kitting in inventory reports</p> <p>The reports were implemented as originally specified, but due to kitting being introduced late in the process, a redesign was not feasible. The kitting process involves obtaining commodities using existing processes, but moving the commodities to a "kitting location" (either within an existing warehouse or offsite at a kitting service provider) where they are made into kits. Our Inventory reports capture the commodities as they are procured, but they disappear from the reports when they are at the kitting location. When the kits are moved to the regular warehouse, they will appear in the reports. In addition, commodities procured for kitting at a kitting services vendor will appear under a separate "kitting" warehouse throughout the procurement process, whereas commodities procured for kitting at an existing warehouse will appear under that warehouse's stock until they are moved to the kitting location to be made into kits. The resulting inventory reports may be slightly confusing as they don't include stock being kitted and as the grouping of the stock is not separated by purpose but by warehouse destination.</p>	
<p>Column header does not repeat on inventory pdf report</p> <p>On the inventory report export to pdf, the top level column header does not repeat on subsequent pages. Individual column headers are repeated on every page.</p>	#15813
<p>Item and manufacturer columns in stock report slightly overlap</p> <p>In the pdf report for Stock by product, Age and Batch, the column for item slightly overlaps with the column for manufacturer. This may cause a letter in the item to be half way hidden.</p>	#15904
<p>Warehouse "NA" is displayed in the dropdown</p> <p>In the inventory report, the dropdown for warehouses shows the value "NA". Since the user would not want to select this value it should be suppressed.</p>	#15910
<p>The text "by" should be lower case</p> <p>On the result table header in the Stock by Product, Age, and Batch report, the text "by" should be lower case.</p>	#15903
Account Statement	
<p>Inconsistency in how negative values are displayed</p> <p>In the account statement and World Wide Loans reports, the negative</p>	#15911

balances are displayed in different formats: -\$xxx.xxx.xx versus (\$xxx.xxx.xx). Formatting should be consistent.	
Product Catalog	
Wording for categories in product catalog search are slightly different than the menus The listing of categories in the search drop-downs of the product catalog uses different wording than the menu item categories.	#15855

Enhancements/Things to Note

ORION	
No validation between project and client There is currently no validation between project and client when entering an RO. A user can enter an unrelated project & client (labeled "Project" and "Client Address Code").	
No process for changing client address – (SOP) Process needs to be developed for situations that require changes to client address on an existing project.	
General Web Site	
Content must reside inside p tags The style sheet for website content relies on the P tag. All content must be inside p tags in order for the correct gutter space to be applied. This issue affects all content pages on the website.	#15043
Login redirects to home page Upon logging in, the user gets sent back to the home page regardless of where the user was when he/she clicked the login button. Users must always navigate from the home page upon logging into the site. This issue affects all users logging in.	#15330
Validation enhancement in CMS admin interface The admin interface for CMS users could be improved by adding validation.	#15320
Error message on Countries page could be improved If a user tries to subvert the page functionality by altering the url, an error message appears with system output.	#15856
Site map includes “goodbye”page The site map currently includes all view level pages, which a user has access to. This includes pages used by applications such as the “goodbye” page which does not display relevant content out of context. Ideally, these pages would be hidden from the tree.	#15913
Mouseover Hints for Column Headers Add “mouseover hints” to some of the column headers in reports where it’s not readily understandable what the term means. For example, if a column header says "shipping out" and a user moused over the header, a hint would	#15944

appear with the explanation "goods shipping out from the warehouse".	
My Commodities Section	
Display data refresh dates Some tables in the data warehouse contain static data which gets refreshed on a regular schedule. If users are expecting certain data to update at a certain time, it may be helpful to display the date and time of data refresh for any reports using these tables.	#15528
Filters indicated in report headers The report headers for html and PDF results tables do not precisely reflect the true filters of the data. Rather the headers are an indication of which search parameters the user chose to run the report.	#15629
Bread crumb trail in My Commodities does not retain search criteria The bread crumb trail links in the My Commodities section are not designed to retain the current search criteria that a user has entered. For example, if a person has navigated to the order details page for RO-114, clicking on the "View Shipments" link in the bread crumb trail will link back to the page without any search results.	#15765
Inconsistency in font size for some pdf reports Due to page size restrictions, the font size in some reports have been reduced to 9 pt. The standard font size is 10 pt.	#15796
Item in dropdown not listed alphabetically if lower case For any item that starts with a lowercase letter, this item will not be listed alphabetically in the select item prompt's dropdown. Instead, this item is listed at the end of the list.	#15865
Country drop down filters on recipient country When a user selects a country from the country drop down, please note that the country used to filter records is the "program country" (the country that the recipient serves) and not a geographic location for shipments.	
Loan account is considered separate funding source A loan funding source is always attached to a parent funding source (such as Malaria and Malaria Loan). However, they are listed as two different funding sources in the drop down menu and display as two different fund sources in reports. This issue affects any drop down menu and report where the user may filter by funding source: View Shipments, Quantity/Value reports showing funding source, and Account Statement reports.	#15934
Combine certain malaria subcategories In the subcategory dropdowns, it would be helpful to recombining certain subcategories so all items of a certain kind can be viewed together, such as artemether items.	#15946
Add automatic date conversion When entering dates in My Commodities reports it might be helpful if the user can type in 01-01-08 and have the system convert this to 01-Jan-2008 versus having to type 01-Jan-2008.	#15947
Simplify report headers in My Commodities Report headers are hard to read because they are written out as opposed to	#15948

using a format that lists the selected prompts. It would be helpful to simplify report headers to use a type of listing format.	
Add "All Task Orders" option When selecting task order, i.e., Public Health, AI and Malaria, why not have "Select All" as an option, versus having to input each one at a time, if you happen to control all 3 task orders?	#15949
Add filtering for all dropdowns In the My Commodities section, only some of the dropdowns are filtered, such as country an recipient. It would be helpful to add filtering to all dropdowns if possible.	#15951
View Shipments	
NEWVERN shipment id numbers not displayed The View Shipments section shows orders and the related items on each shipment or order. The itemized list for an order does not show individual NEWVERN shipment id numbers. This issue affects only NEWVERN orders.	#15942
Required fields label may be misaligned in certain browsers The label for *required field on the View Shipments page may be misaligned in certain browsers and/or certain screen resolutions.	#15716
Minor inconsistencies in alignment of columns in Order Details page Since html table cells conform to their content, there may be slight differences in how columns display for individual items on an order.	#15804
Minor inconsistencies in alignment of columns in View Shipments page Since html table cells conform to their content, the columns in the View Shipments results table may shift.	#15817
Hard to distinguish recipient names in View Shipments result table Because some recipient names are the same, it is hard to distinguish one shipment from another if a users searches on all countries. It would be helpful to add a country column to the View Shipments result table.	#15867
Shipment Details query could be improved If a shipment BOL exists but no ship date exists (not a valid business scenario), the link to "View Shipment Details" will appear but not records will be found.	#15906
MAWB field should be updated by 214 EDI The MAWB field must be populated for the Shipment Details page to display correctly. At the moment this is a manual process. The EDI 214 HAWB & MAWB fields should map to Orion's HAWB & MAWB fields so that the 214 will update those fields.	#15940
Add SKU to batch information page On the batch information page it might be helpful to add SKU.	#15945
Quantity Value Summary Reports	
Reports not showing unit of measure The following reports could be improved by showing unit of measure in the header: Quantity and Value Summary Report, Six Year Quantity Summary	#15799

Report, Two year Quantity Summary by Status Report.	
Handling of unlike subcategories Some quantity value summary reports show aggregate data for the quantity of subcategories. For any subcategory where items do not have the same unit of measure, NA will be displayed instead of summing up “unlike” items.	
Variance in dropdown choices for subcategories The dropdown menu for item does not display the “All items” option for any subcategory with “unlike” items. Due to differences in the unit of measure for items in an “unlike” subcategory, the items cannot be summed up.	
Inventory	
Inventory report extends past screen width The inventory report was designed to show unit cost and WAC side by side. This causes the report to extend beyond the screen width for most users.	#15529
Add main menu items to flyouts On the flyout (mouseover) menus on the left side, only submenu items are listed. This may be confusing to the user so an improvement could be to add the main menu item to the flyout. For example, add inventory to the flyout for that section.	#15952
Account Statement	
Foot note displays on next page on account statement On the Account Transaction History Report the foot note displays after the Details section of the report and before the Donation section starts. If the Details data ends on last line of the page, the note will appear at the top of next page.	#15772
“Through” date is always today’s date on the current account statement When running an Account Transaction History Report with a “through” date in the future, the report automatically displays the end date as today’s date since this is a report of historical data.	#15783
Account statement error message outputs system information If a user runs an account statement and no result is returned, a window pops up some system output and the error message: no data matches your search criteria. This message could be improved by hiding the system output.	#15798
Account statement rounding Due to the splitting out of costed value items, the current account statement may have minor rounding errors (a discrepancy of \$0.01 has been observed).	
Account statement includes blank page when no donations In the account statement, the report will include a blank page at the end of the report if there are no donations.	
Freight charge is not listed by item, but by SO If an order has several items on one SO, commodities charges in the account history view are listed as separate records for each item, but the freight estimate is listed as one charge for the SO.	#15917
Donation Adjustments If an adjustment to a donation transaction is posted, it will report correctly	#15943

for the donor's account, but will not show at all in the donee's account reports, regardless of whether it's a negative or positive adjustment. Change this behavior to report positive and negative adjustments to the donee account.	
Expand date range for account history report For the Account Transaction History Report it might be helpful to allow a user to select a range of 36 or 60 months.	#15950
Product Catalog	
Indication of registration waiver In the product catalog, a registration waiver for a certain country is indicated by a red graphic next to the product description. This design could be improved by using a clearer indicator.	#15569
Estimated prices in product catalog Estimated prices in the Product Catalog currently display with two decimals only. The actual estimated price may require more than two decimals to display the exact price. This issue affects all estimated prices in the catalog.	