User Guide

Master Modules

Version 1.0

**Date: Tuesday, 25th Oct 2021**

What is Master data?

Basically in the applications, data are divided into two parts: One is Master data & another one is Transaction data. Master data are the backbone of the application because without master data we can't run the application.

And also in our EI application, master data are divided into two types: 1. Knowledge Masters 2. Operational Masters.

Knowledge masters are the main masters, in these we have defined the treatments, assessments, evaluation parts. We can't don any modification on these masters easily because it linked with the application process flow.

Operational Masters are block masters, panchayat, village, hierarchy master, user master etc., We can easily add, edit, delete these operational data.

Only IT Person/administrator have permission to access the Master pages.
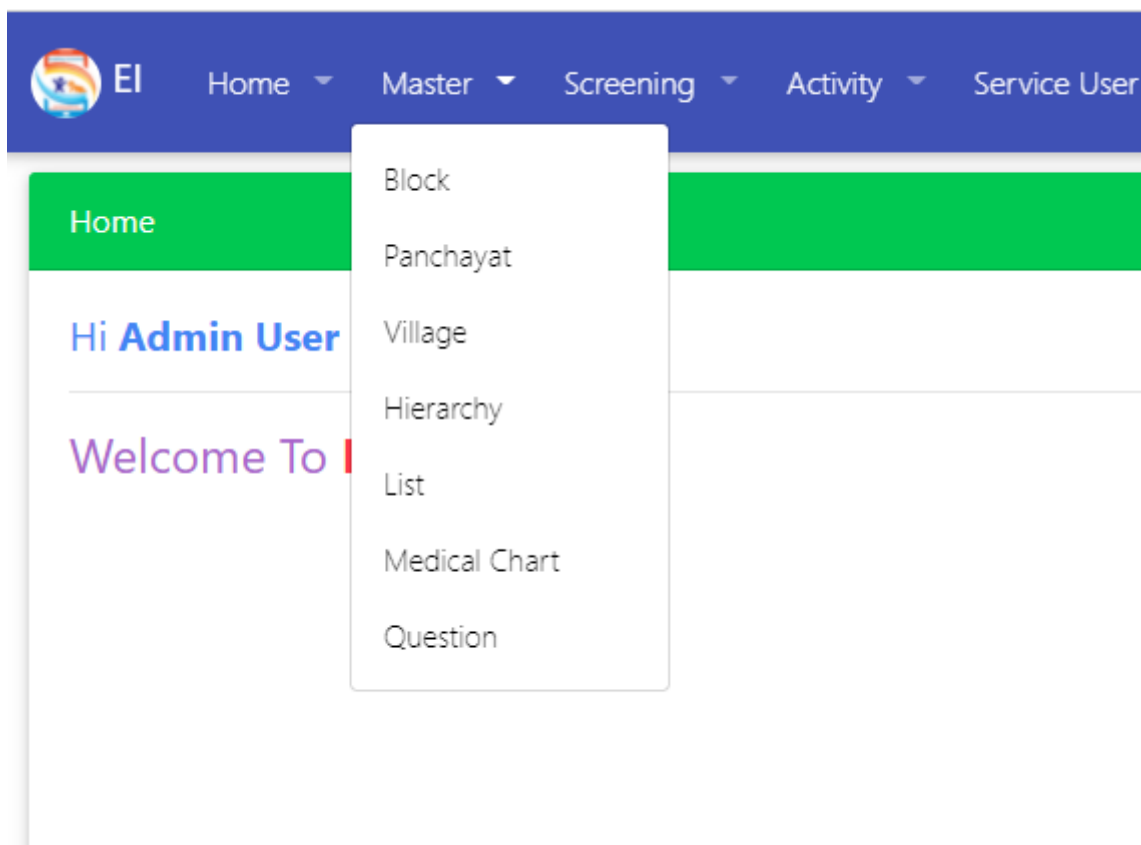
Block Master:

Block Master is the main master in EI app. All our modules are working based on block master.

Click on the "id" field to edit the existing block data.

Add the blocks by clicking "+" symbol

Delete the blocks by clicking this symbol

After clicking on the + symbol, a pop-up window will open, there we have to type the block name and save it.

type the block name and save the detail

Panchayat Master:

After creation of the block master, we need to add the Panchayat detail. Block is like a parent item and Panchayat is a child item for the block.
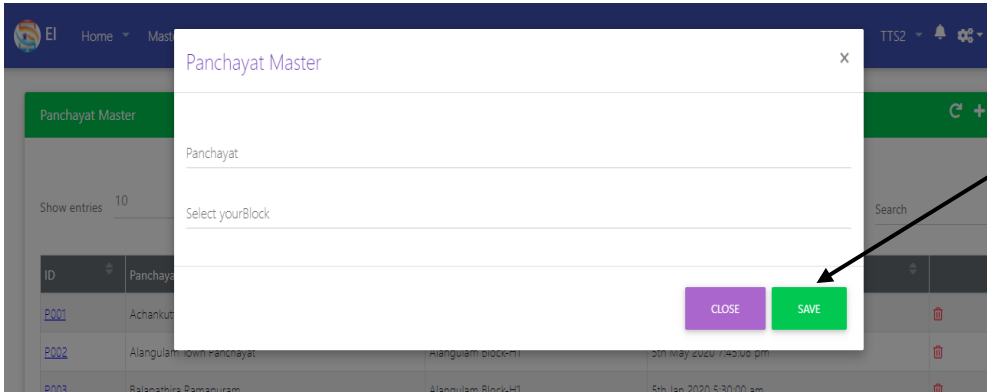

Add the Panchayat by clicking "+"

Delete the Panchayat by clicking this symbol

After clicking on the + symbol, a pop-up window will open, there we have to select the block from the list and then type the name of the panchayat and save it.
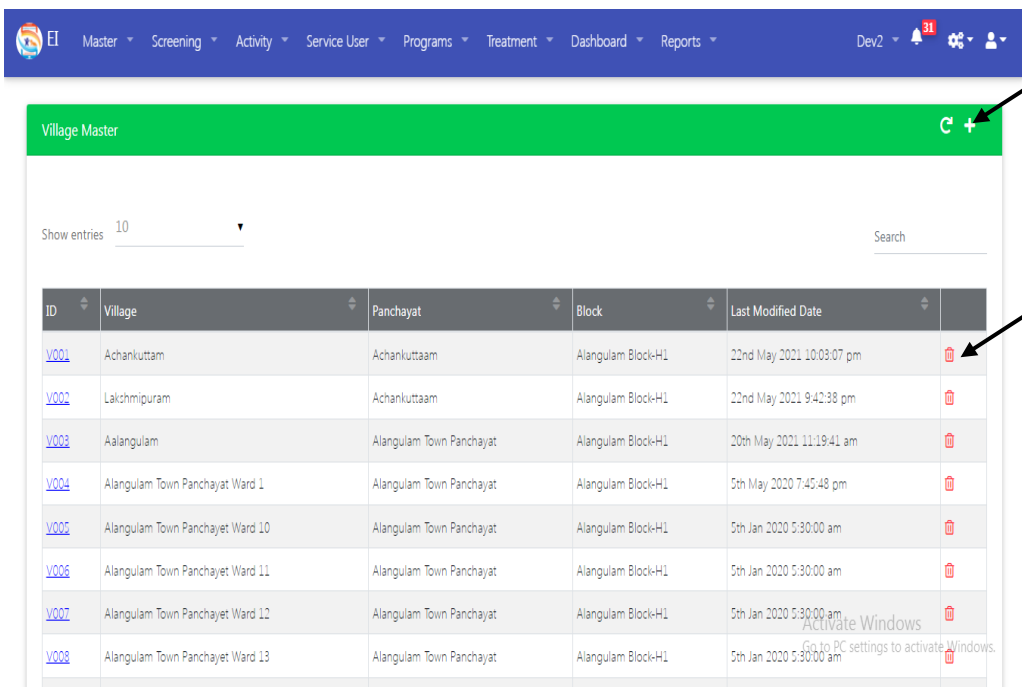
Click on the "id" field to edit the existing panchayat data.

type the Panchayat name and select the block and save the detail

Village Master:

After Creation of the block and panchayat, we need to add the village detail.

Add the village by clicking "+" symbol

Delete the village by clicking this symbol

After clicking on the + symbol, a pop-up window will open, there we have to select the block, panchayat from the list and then type the name of the village and save it.

Click on the "id" field to edit the existing village data.

type the Village name and save the detail
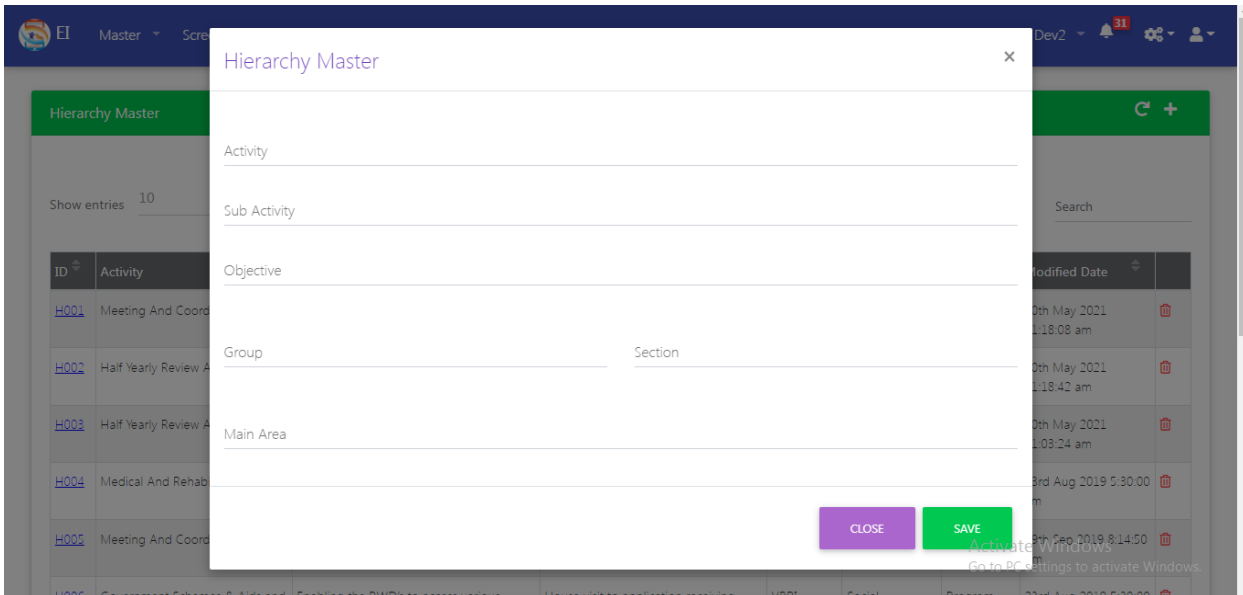
Hierarchy Master:

The data on hierarchy master are using on ATPs.

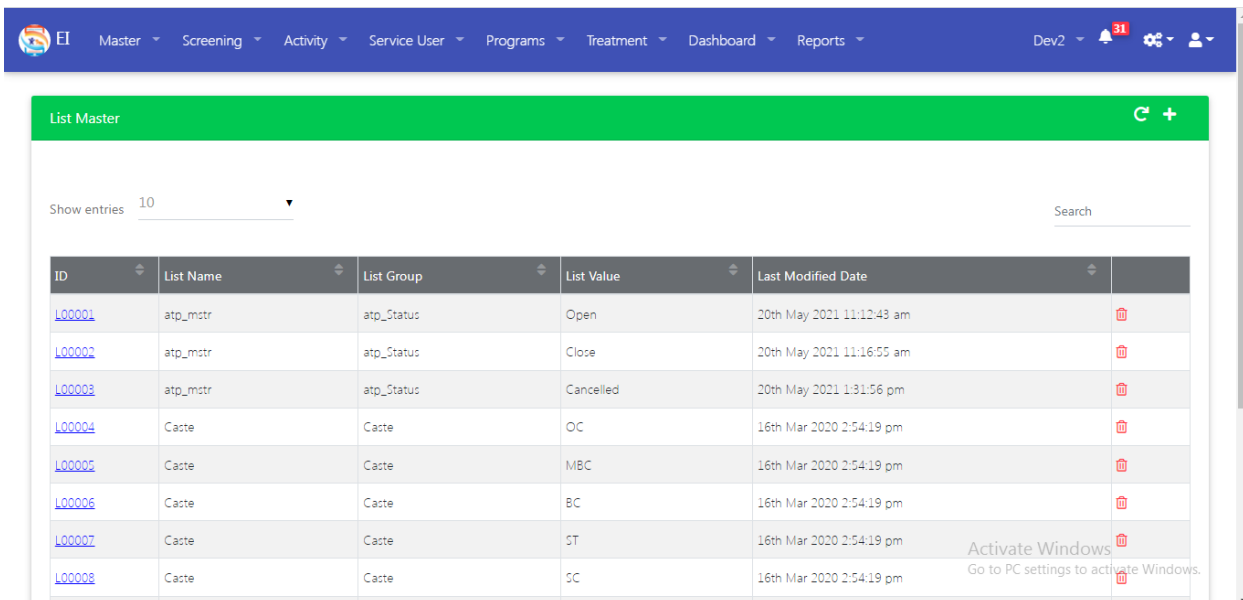Delete the hierarchy by clicking this symbol

Click on "+" symbol to add new hierarchy information, objective is the parent item, activity is the sub parent and the sub activity is the child item.

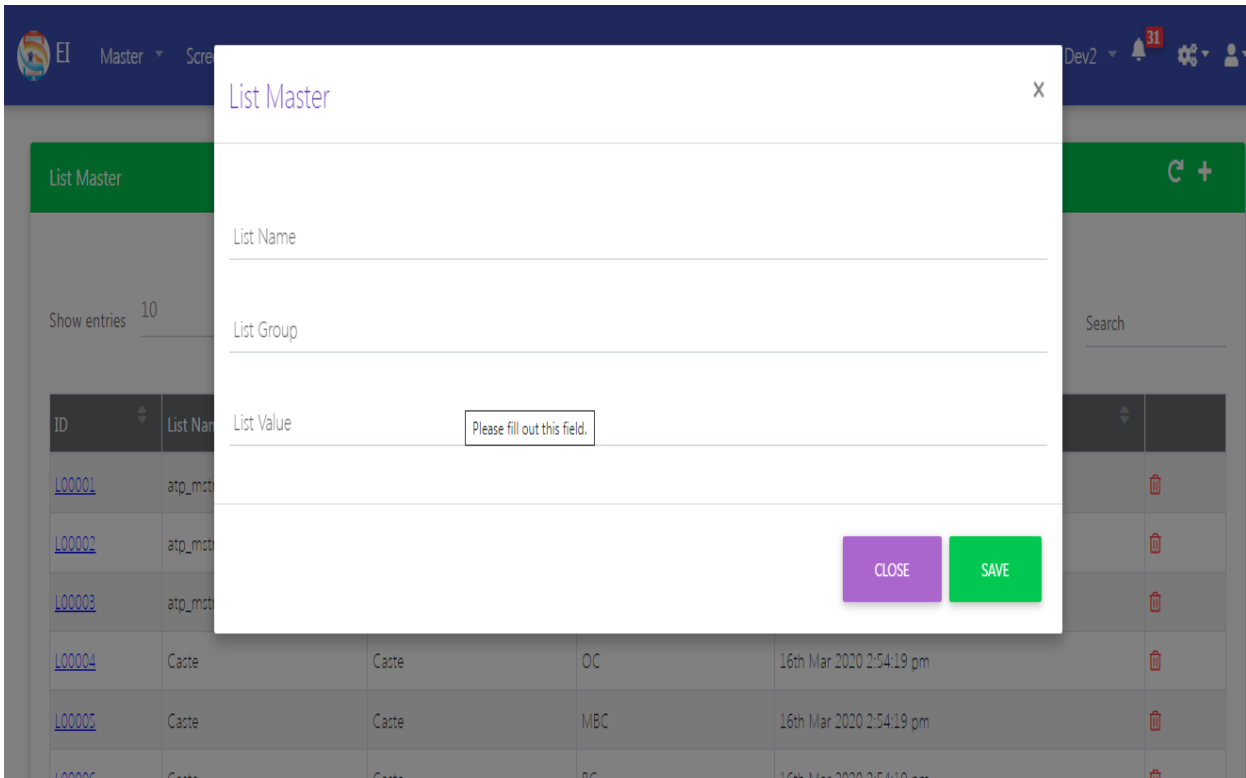Click on "id" field to edit the existing hierarchy data.

List Master:

List master is used for other masters like Centre list, caste list etc.,

By clicking on the + symbol, we can add the new item in the list master and by clicking on ID, we can edit the existing data. In the list master, we can add the data only on existing list group, we can't create new list group.

Medical Chart:

Medical chart master is one of the main Knowledge master in the application, all treatment and evaluation data are retrieved from this master. Since it is a main knowledge master, we can't add new items.

To edit the existing data, click on the data which we want to modify then fill the problem, goal and treatment and save the detail.

Question Master:

Question master is second main Knowledge master in the application, all feedback and assessment questions are retrieved from this master. Thorough this question master, we can easily add/edit the questions in assessment & feedback forms.

Click on "+" to add new question: in the form type field select form name (General assessment/special assessment/parents feedback etc.,) on which we want to add the question. In question head, we have to give heading label for the question. QH order no is Question heading order number. Question, order no and question type (dropdown, multiple options, single options, textbox, etc.,), if a question type is dropdown or option based then we have to give the values in the choices field.

If we want to add a question based on answer of other question, then we have to mention that question in dependency field.

If we want to edit existing questions, search the question name using search line on the right side, then click on the "ID" link of the concerned question and edit the information and save it.

Settings:

Under settings icon on the top right corner, we have users, roles, access rights, holiday, service user page setup masters are there.

Authorization Master:

In authorization master, we can create the authorization label

By click + symbol we can add the new authorization name and their description. Then Save the details.

Authorization Access Master:

In authorization access master, we can set the access rules for the authorization label which we have created in authorization master.

We can add authorization access details by clicking "+" icon. Following creation page will display, first select the authorization label for which we want to add the rules through search icon. Second give the page name & tab name clearly then select the authorization permission and then save.

To edit the existing rule, click on the "ID" link and edit the information.

Profile Master:

In profile master we can create the profile labels.

Clicking on the + icon will open the window below, and then we will need to fill in the profile name and description to create a new profile.

To edit the existing rule, click on the "ID" link and edit the information.

Profile Assignment:

In profile assignment we can set the authorization rules to the profile

For example, if we want to grant master module permission to FTL role users, then we must first select the profile as FTL and click on the master related check boxes.
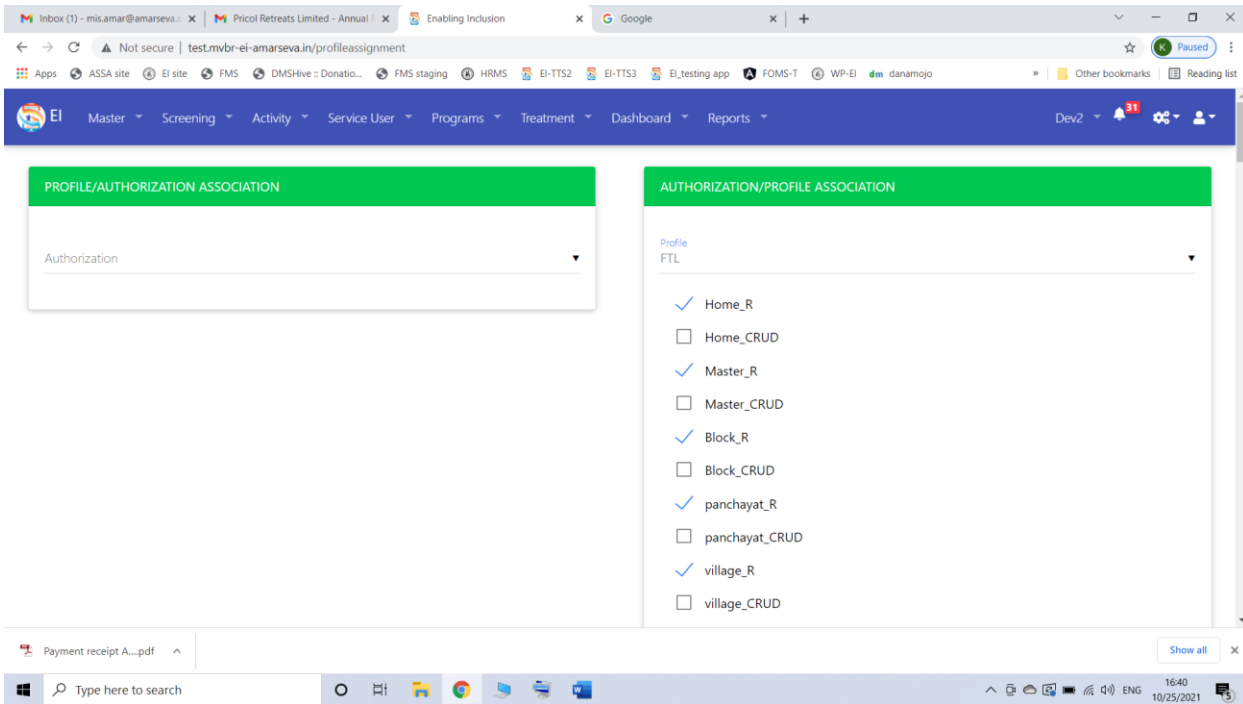
User Maintenance:

We can add "n" no of app users through "User maintenance" page.

By clicking on "+" symbol we can add the users.

In the user page, we have users on/off provision to deactivate or activate the existing users.

To add new users, following information are much needed: Block, user role, user manager and Is mobile. "Is mobile" field for to identify the user type whether the user is mobile app user then we have to check this field or no need check on it.

Holiday Master:

We have to save the holiday details in the application through this master, then the application will skip those dates while assigning the treatment plan.

By default, the app will skip the Sundays so no need to define Sundays on holiday master.

Clicking on the + icon and fill the required details and save it..

Browse Data:

Browse master have a many sub masters. Here we can access the page design master which is used for Service user page designing, label Master, State Master, Country Master.

No need to make any changes on other masters like form mappings, domain master, division master etc.,

Page Design Master:

Through page design master, we can edit the service user page fields. For example, if we want to add additional field values in "Consent by" dropdown list, open the field by clicking on the "ID" link and click on "edit" button and make required changes on the field value and save it.

Country Master:

We can add new country by clicking on + symbol.

State Master:

We can add new states by clicking on + symbol, while adding a new state, we have to mention the state's country also. Click on the "ID" link to edit the existing state labels.