



MakeMyReport.com

Frequently Asked Question v0.1

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Contents

Unit – I: All Users	4
1. System Requirements for Make my Report.com	4
2. What is my access URL?	5
3. How can I Sign in?	6
4. How do I change my password?.....	6
5. What is the difference between admin user and contact user?.....	6
6. How can I update my profile details?	6
Unit – II: Admin User(s)	7
1. What are the privileges I have as admin user?	7
2. Who can use the admin account?	7
3. How to create an admin account?.....	7
4. How do I create a new contact?.....	7
5. How can I edit a contact?.....	7
6. How do I deactivate a contact?.....	7
7. How can I create a report?	7
8. How can I design the report?.....	8
9. Can I see the preview of the report?	8
10. How can I assign the report to my contacts?.....	8
11. How to check reply from contacts?	8
12. How can I track the response received from contacts?.....	8
13. How can I create a PDF or print the form that I designed?.....	8
14. How can I export the replies from all the contacts to excel sheet?	9
15. How can I use the formula tab available in the screen showing report results?.....	9
16. Can I see the analytics for a particular field in chart?.....	9
17. How to check the archive reports?.....	9
18. How can I assign a report to myself?.....	9
19. How can I submit the assigned report by myself?.....	9
20. An admin user can create how many reports and how many contacts?.....	9

21. The limitation of creating contact or creating report for an admin account user can be changed or not?	9
22. Can the admin user use the Mobile App?	9
Unit – III: Contact Users.....	10
1. How do I submit a report assigned to me?	10
2. What if I leave the compulsory field as blank?	10
3. Can I upload any type of file in the form where upload option is given?.....	10
4. I have wrongly filled up some data in a report, can I edit the report?	10
5. Can I edit a form if submission date is exceeds?.....	10
6. Can I view the submitted report?.....	10
7. Can I delete a submitted report?.....	10
8. What is the Reject button?	10
9. What may be the reason if a reject button is not showing against some reports?	11
10. Can a contact user use the mobile app to submit the report?	11
11. On what platform can a user use the Mobile App?	11
12. How can a contact use the mobile app of MakeMyReport.com?.....	11

Unit – I: All Users

1. System Requirements for Make my Report.com

MakeMyReport.com is fully web-based and hosted solution, so there's nothing to download or install. You can use MakeMyReport.com on a Windows, Mac or Linux computer as long as you're using a supported web browser and have an Internet connection. The supported browsers are:

- Internet Explorer 9.0+
- Firefox - **Recommended**
- Safari
- Opera
- Google Chrome

You must have JavaScript and cookies enabled in your browser.

Note: While MakeMyReport.com will work with older browsers, such as Internet Explorer 8, we do recommend keeping your browser updated to the latest version for the best possible experience. You can download the latest version of IE here and the latest version of Firefox here. If you're using Internet Explorer 8 or greater, **please make sure Compatibility View is turned off.**

Please note, from time to time you may need to clear your cache when we make updates to the platform to make sure you are using the current version.

Here are instructions to clear your cache on the particular browser you are on:

Chrome:

- Go to `chrome://chrome/settings/clearBrowserData`
- Check “Empty the Cache”
- Choose “From the Beginning of time”
- Click “Clear Browsing Data”

IE:

- Click the “Tools” menu bar.
- Choose “Internet Options”
- On the “General” tab, click “Clear History”
- When it asks “Delete all items in your History folder?”, click “OK”
- Click “OK”

Firefox on OSX:

- On the menu bar, click on the Firefox menu and select Preferences
- Select the Advanced panel

- Click on the Network tab
- In the Cached Web Content section, click “Clear Now”
- Close the Preferences window

Firefox on Windows:

- Go to Options (if you’re running recent versions of Firefox, you click the orange Firefox button, then go to options, and then options again)
- Click “Advanced”
- In the Cached Web Content Section, click Clear Now.

Safari on OSX:

- Click Safari
- Click Reset Safari
- Uncheck everything but “Remove All Website Data”
- Click Reset

Safari on Windows:

- Click the Cog on the right side of the search bar
- Click Reset Safari
- Uncheck everything but “Remove All Website Data”
- Click Reset

Opera:

- Click Opera
- Click Preferences
- Click Advanced
- Click History
- Click the “Empty Now” button in the same row as Disk cache

2. What is my access URL?

The access URL is the assigned URL for your organisation which is usually as follows:

<http://www.makemyreport.com/cor/{organisation domain}>

Say you have your organisation domain as **nalcopoc**, then your access URL is:

<http://www.makemyreport.com/cor/nalcopoc>

3. How can I Sign in?

For signing in, it is important that you should have a valid User ID and password obtained from your Organisation Administrator.

With User ID and password you can visit the access URL for your organisation and then sign in to your account.

4. How do I change my password?

Go to change password button on top right corner. After clicking the link you will be asked to enter the old password and enter new password and confirm password. After validating the system will change the password and you will get a confirmation message as the password has been changed successfully. If it fails you will be notified about the same.

5. What is the difference between admin user and contact user?

Admin user in MakeMyReport.com is the user with the privilege to Create, Design and Assign a report to the users in the contact list. And the contact user is the one who submits the report assigned by the admin user. Admin user can assign a report to himself/herself and also can submit the same.

6. How can I update my profile details?

Click on the profile button on top right corner then update the full name, mobile no., date of birth field and click on save button to update the profile details.

Unit – II: Admin User(s)

1. What are the privileges I have as admin user?

As admin user you can perform the following tasks;

- a. Create a user.
- b. View the contact list, edit the user etc.
- c. Create a new report.
- d. Design the report and assign it to contacts.
- e. View reports submitted.
- f. View expired reports.

2. Who can use the admin account?

An admin account can be used by the head user of the organization who wants to collect some information in reports from subordinates.

3. How to create an admin account?

An admin account will be created by technical team of makemyreport.com

4. How do I create a new contact?

Go to create new contacts submenu of my contacts menu, then fill up the details of contact and click on submit button to save the contact.

Here you have two options:

1. Create a single contact: by filling up the form on the left of the page.
2. Bulk upload: by filling up the excel sheet with required data and uploading it to server. The application then imports the contacts to the contact list.

5. How can I edit a contact?

You can edit a contact by clicking on the EDIT button available against the contact details in the list. Edit the details and then update the contact.

6. How do I deactivate a contact?

You can deactivate a contact by clicking the deactivate button against the contact in the contact listing screen.

7. How can I create a report?

Go to my report menu then click on the sub menu as create a new report. Fill up all fields like name of the report, description of the report, date of submission then click on save button to save the report.

The points that you need to know are:

- If you select the report type as INSTANT then you can select how many times the report can be submitted by the contact.
- DAILY, WEEKLY and MONTHLY report types can be submitted by the contacts only once as applicable.

8. How can I design the report?

Go to my report menu, then click on the sub menu as design your report & assign to contacts. Now check the list of created reports and click on ADD FIELDS button against the report that you wish to add the fields for.

Now you are in the form design page. You can add fields by selecting the field type from the left panel. When you click the field on the left, a field type is added to the right which shows the report that you are creating.

Now you can edit the properties of the field you selected by just clicking on the input type on the form design panel. You can change the label name, add options for checkboxes, select box, radio buttons. You can set the min and max range for the text fields.

In case you wrongly selected an input type you can remove it by clicking the cross button on top of the template.

9. Can I see the preview of the report?

Yes, you can preview the report by clicking the link on the right hand side of the screen to preview.

10. How can I assign the report to my contacts?

Once the report design will be completed, then click on the ASSIGN button on the right side of the screen to assign the report to your contacts. In the next screen, select the contact check boxes then click on save button to assign the report to selected contacts.

11. How to check reply from contacts?

Click on the submenu as view reply on assigned reports of my reports menu.

12. How can I track the response received from contacts?

Check the response report submenu of my reports menu.

13. How can I create a PDF or print the form that I designed?

To create the PDF or print the form for reference you can click on the Preview form button on the extreme right of the screen. On the next screen, top right you will find a button to print or create a PDF of the displayed form.

14. How can I export the replies from all the contacts to excel sheet?

In the view response button in the report listing page, you have an option to export the result to excel sheet. The excel sheet by default exports the columns that is visible in the page. To export the whole result, you need to select all the fields in the ***SELECT YOUR FIELDS TAB*** on top of the screen.

The exported excel is downloaded and saved to your system, you can print and create reports as per your choice.

15. How can I use the formula tab available in the screen showing report results?

The formula tab can be used if your report contains numeric or decimal fields. Then you can apply the available formula options in the tab.

Example: say you have a field called amount which is numeric and you have received responses from the contacts. You can first select the column to be shown from the ***SELECT YOUR FIELDS TAB*** and then go to the Formula Tab and apply the formulas like SUM, AVERAGE etc. the result will be shown right below your list.

16. Can I see the analytics for a particular field in chart?

Yes, you can view the chart just by clicking the chart icon besides the field heading in the listing. You can also select to see the bar chart by clicking the bar chart option on the screen.

17. How to check the archive reports?

Check archive reports submenu of my reports menu.

18. How can I assign a report to myself?

Go to view reply on assigned reports submenu under my report menu, click on assign button then select the first check box names as “***you***” under the user list and save it.

19. How can I submit the assigned report by myself?

Click on the submenu as submit a report of my reports menu.

20. An admin user can create how many reports and how many contacts?

An admin user can create 100 reports & 1000 contacts.

21. The limitation of creating contact or creating report for an admin account user can be changed or not?

Yes, as per the requirement the limitation of creating contacts and reports can be changed.

22. Can the admin user use the Mobile App?

Yes, but just to submit any report assigned to him/her. The App cannot be used to create, design or assign reports.

Unit - III: Contact Users

1. How do I submit a report assigned to me?

The recently assigned report to you is shown on the home screen after you sign in to your account. You can click on the SUBMIT button then fill up the assigned report and click on submit.

Also you can view all reports by clicking on Submit a report submenu of my reports menu. This will show you all the reports assigned to you. You can click on submit against the report you wish to submit.

2. What if I leave the compulsory field as blank?

It will show a validation message to fill up the mandatory fields and it will not allow to save the form until the mandatory fields have not been filled up.

3. Can I upload any type of file in the form where upload option is given?

No, file upload is limited to few extensions and file size. This is mentioned in red besides the file upload option.

4. I have wrongly filled up some data in a report, can I edit the report?

Yes, you can edit the fields of the report. To do this you need to click VIEW button in the report listing against the report you are willing to edit. In the next screen you will have the option to edit the entry that you wish to.

5. Can I edit a form if submission date is exceeded?

No, you cannot edit the form if the submission date is exceeded.

6. Can I view the submitted report?

Yes, you can view the submitted report by clicking the VIEW button against the report in the listing page. The screen will show you the details that you entered to fill up the report.

7. Can I delete a submitted report?

Yes, you can delete a submitted report you made earlier by clicking the delete button on the listing.

8. What is the Reject button?

Reject is an option for you when you feel the report has been wrongly assigned to you and you do not have any data for the report. Then you need to click on reject button. Once you click Reject you will be asked to give a reason (compulsory field) for the same which you can fill up and the report will be marked rejected.

9. What may be the reason if a reject button is not showing against some reports?

If the reject button is not showing against some reports, it is obvious that you have submitted the report or the report has expired. Some of the reports are set to be submitted multiple times, so if you submit a particular report once the Reject button will be hidden.

10. Can a contact user use the mobile app to submit the report?

Yes, a contact user can use the mobile app to submit the report.

11. On what platform can a user use the Mobile App?

Presently the Mobile App is for the Android platform but shortly it will be available for iOS and Windows device.

12. How can a contact use the mobile app of MakeMyReport.com?

The app can be installed on Android device and on the first launch the app asks the user to enter the Corporate ID. After the Corporate Id is entered by the user the user can login and see the reports assigned and submit the reports.