

Cases

Summary:

The Cases screen was based upon the Service Request Business Component. Though the concept and logic of the Siebel Vanilla Service Request screen was similar to the requirements of the OCTS Cases screen, customization was required to specifically meet client needs. Rather than being “product” and “area” oriented as is a Vanilla Service Request, an OCTS Case is “issue” related. Several new fields were required to facilitate the intake of all necessary issue information. Pick lists were utilized to create issue categories and issue sub-categories which are related only to the chosen category. Assignment Manger business rules were created so that new cases will automatically be assigned to a member of the appropriate team. The majority of the views found within the OCTS Cases screen contain the Case detail or list applets as well as an applet based upon another screen (i.e., the Activities screen). To understand the customization required for these non-Case applets, please see the appropriate section of the customization report for the screen in question.

Data Mapping :

For a detailed data mapping summary, please refer to Appendices A1-A2.

Picklists:

The following is a list of new picklists that were added for the OCTS 2.0 system.

- Original Issue Category
- Revised Issue Category
- Original Issue Sub-Category
- Revised Issue Sub-Category
- Referred By
- Customer Expectation Category
- Customer Expectation Sub-Category

For a list of the values in these picklists, please refer to Appendix B1.

VB Code:

Customization of the Cases screen did not require any VB Code.

Charts:

Title: All Cases by Date Received

Business Component: Service Request

Chart Summary: Displays number of cases (Y) by the date the case was received (X).

Title: All Cases by Original Issue

Business Component: Service Request

Chart Summary: Displays number of cases (Y) per original issue category (X).

Title: All Cases by Ombudsman Specialist

Business Component: Service Request

Chart Summary: Displays number of cases (Y) per assigned Ombudsman Specialist (X).

Title: Open Cases by Date Received

Business Component: Service Request

Chart Summary: Displays number of open cases (Y) by the date the case was received (X).

Title: Open cases by Original Issue

Business Component: Service Request

Chart Summary: Displays number of open cases (Y) per original issue category (X).

Title: Open cases by Ombudsman Specialist

Business Component: Service Request

Chart Summary: Displays number of open cases (Y) per assigned Ombudsman Specialist (X).

Title: Closed Cases by Date Received

Business Component: Service Request

Chart Summary: Displays number of closed cases (Y) by the date the case was received (X).

Title: Closed cases by Original Issue

Business Component: Service Request

Chart Summary: Displays number of closed cases (Y) per original issue category (X).

Title: Closed cases by Ombudsman Specialist

Business Component: Service Request

Chart Summary: Displays number of closed cases (Y) per assigned Ombudsman Specialist (X).

Title: Closed Cases by Date Closed

Business Component: Service Request

Chart Summary: Displays number of closed cases (Y) by the date the case was closed (X).