

Ombudsman Case Tracking System 2.0

Customization Report

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Siebel Customization Report Summary

The following Siebel Customization Report summarizes how the base Siebel application was configured to meet the requirements of the Office of the Ombudsman. The application development team made as few changes to the Base Siebel application as possible. To meet the client's data and functional requirement needs, various types of changes were required, such as adding data fields, creating code using Siebel Visual Basic, changing picklist values, and creating screen navigation aids.

This document is broken down by the individual screens within OCTS 2.0. A Siebel screen refers to what a user views in the application when a tab is clicked. For example, the Cases Screen is visible when the Cases Tab is clicked. Once a screen is visible, the left side contains a viewbar listing all the views available on that screen. Each section of this report contains the following:

1. A summary describing the screen, the views on that screen, and changes that were made to the Base Siebel Application.
2. A reference to the Data Mapping Appendix for that screen, which describes which data values were added.
3. A list of picklists that were added to the screen, as well as a reference to the Picklist Appendix for that screen.
4. A summary of Siebel Visual Basic (VB) code that was created for the screen, if any, and a reference to the VB Code Appendix for that screen.
5. A list of all charts that were added to that screen, including summaries of what each chart shows.

There is also a section within this document covering Assignment Manager. Even though Assignment Manager is not a screen, it still required configuration to meet client requirements.

Appendices to the Siebel Customization Report:

The following Appendices are included to provide more detailed information:

1. **Data Mapping** – contains tables that show the names of the data fields and the columns and tables to which the data fields are mapped.
2. **Picklists** – the names and actual values are listed for all new picklists. Additional values added to Siebel Vanilla picklists are also listed.
3. **VB Code** – contains the actual code that was written for each screen.
4. **SmartScript Scenarios** – contains the names of the questions, the question text, and the location where the answers are saved, listed in the order they appear in the script.
5. **Assignment Manager** – contains information on the rules that were set up to assign cases to Ombudsman Specialists.

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 Manager 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).

Issues

Summary:

Siebel Vanilla does not provide the ability to have multiple issues related to a case/single service request (please see the section on the customization of the “Cases” screen). The Service Request business component does, however, have a natural relationship with the Product Defect business component; it allows each service request to have multiple product defects. To provide the desired OCTS 2.0 functionality, an Issue screen was created and based upon the Siebel Vanilla Product Defect business component. In OCTS 2.0, each case may have multiple issues by adding issues through the Case Issues view of the Cases screen. Information about individual issues will be found on various views of the Issues screen. Several new fields were required to facilitate the intake of all necessary issue information. Picklists were utilized to create issue categories and issue sub-categories that are related only to the chosen category. The detail below illustrates the customization implemented for the Issues applets. For information on the Activity applet, please see the Customization Report section devoted to the Activity Screen. The other applets used in Issues views are Vanilla applets which did not require modification.

Data Mapping:

For a detailed data mapping summary, please refer to Appendices A3-A4.

Picklists:

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

- Issue Category

- Issue Sub-Category

For a list of the values in these picklists, please refer to Appendix B2.

VB Code:

On the OCTS Issue List, Entry, and Form Applets, VB was used to automatically populate Sub-Status with “Resolved” if the Status selection is “Closed”.

For the actual VB Code, please refer to Appendix C1.

Charts:

Title: Number of Issues by Status

Business Component: Product Defect

Chart Summary: Displays number of issues (Y) categorized by issue status (X).

Title: Number of Issues by Sub-status

Business Component: Product Defect

Chart Summary: Displays number of issues (Y) categorized by issue sub-status (X).

Title: Number of Issues by Ombudsman

Business Component: Product Defect

Chart Summary: Displays number of issues (Y) categorized by the assigned Ombudsman Specialist(X).

Title: Number of Issues by Date Opened

Business Component: Product Defect

Chart Summary: Displays number of issues (Y) by the date it was opened (X).

Title: Number of Issues by Date Closed

Business Component: Product Defect

Chart Summary: Displays number of issues (Y) by the date it was closed (X)

Accounts

Summary:

The Accounts Screen was based upon the Account business component. Customization was necessary to meet the client's requirements. For the client's application, an account could be either a person or a company. Several new fields were created to facilitate the intake of all necessary Account information. One of these new fields, called "Reminders," shows error messages. This was necessary since pop-up message boxes are not supported in Thin Client. New picklists were created for several of the fields. The Account Entry applet was designed to mirror the Contact Entry applet, as most of the information will be duplicated. Siebel VB code was added to provide functionality not available in basic Siebel Tools configuration (see below for details). Two new views, Account Results and Account Partners, were added to the Accounts Screen. The Account Partner view filters the Account list based on the Account Type value of Partner. The Account Results view is based on the new Results Screen. All other views on this screen were copied from Siebel Vanilla, except for use of the name "Cases" instead of "Service Requests" and "Loans" instead of "Assets." The modified Loans view shows the detailed loan information associated with each account.

Data Mapping:

For a detailed data mapping summary, please refer to Appendices A5-A8.

Picklists:

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

Suffix
Contact Method

For a list of the values in these picklists, please refer to Appendix B3.

VB Code:

Code Summary:

Siebel VB code was written on the Account Business Component, under Bus_Comp_SetFieldValue. When the Account is a student, the Account field will be populated with the student's social security number and the Account Type field will be 'Customer.'

If the Account Type is 'Customer,' the code checks the length of the Account field, and if the length is 9, it will format the number as ###-##-####. If the length is not 9 digits, an error message is displayed in the Reminders field. The code also checks the length of the zip code, and if there are 4 extra digits, it will be formatted as #####-####. The email address fields may be populated with home page addresses.

The code will check to see whether or not the data is an email address or a homepage. If the data is a homepage, the format is checked. If the format is incorrect, a message will display in the Reminders field. When the Contact Method is chosen from the picklist, the code will verify that the field that matches the chosen contact method is populated. If it is not, then an error message is displayed in the Reminders field. When 1st email or 2nd email is chosen as the contact method, the code will verify that these fields are not empty, as well as the home phone number field.

For the actual VB Code, please refer to Appendix C2.

Charts:

Title: Number of Accounts by Account Type

Business Component: Account

Chart Summary: Displays number of accounts (Y) categorized by the account type (X).

Title: Number of Accounts by State

Business Component: Account

Chart Summary: Displays number of accounts (Y) categorized by the state where the account is from (X).

Contacts

Summary:

The Contacts Screen was based upon the Contact business component. Customization was necessary to meet the client's requirements. Several new fields were created to facilitate the intake of all necessary Contact information. Also, new picklists were created for several of the new fields. The link between the Contact and Account address information was removed, allowing a completely separate Contact address to be captured. Pick Maps were added to the Contact views to automatically populate certain fields, eliminating the need for duplicate data entry. Many of the Contact fields are populated with data from the same type of fields in Account, but the user has the ability to overwrite the data if necessary. Two new views, Contact Partners and Contact Customers, were added to the Contacts Screen. These views filter the Contact list based on the Contact Type values of Partner and Customer. All other views on this screen were copied from Siebel Vanilla, except for use of the name 'Cases' instead of 'Service Requests.'

Data Mapping:

For a detailed data mapping summary, please refer to Appendices A9-A10.

Picklists:

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

- Suffix
- Contact Type
- Relationship/Title
- Contact Method

For a list of the values in these picklists, please refer to Appendix B4.

VB Code:

Code Summary: No VB Code was added to the Contact screen.

Charts:

Title: Number of Contacts by Contact Method

Business Component: Contact

Chart Summary: Displays number of contacts (Y) categorized by the contact method (X).

Title: Number of Contacts by Contact Type

Business Component: Contact

Chart Summary: Displays number of contacts (Y) categorized by the contact type (X).

Activities

Summary:

The Siebel Vanilla Activities screen provided most of the functionality and fields required by the OCTS 2.0 system. The major addition to the Activities screen was a field called “Duration in Minutes.” The purpose of this field is to track how long an activity takes from “Actual Start” time to “Actual Completion” time. Because an activity is a very specific action, it is expected that most activities will take a short amount of time, thus duration is calculated in minutes. The detail below illustrates the customization implemented for the Activity screen. The other applets used in Activities views are Vanilla applets which did not require modification.

Data Mapping:

For a detailed data mapping summary, please refer to Appendices A11-A12.

Picklists:

No new picklists were added to the OCTS 2.0 System.

For a list of changed values in existing picklists, please refer to Appendix B5.

VB Code:

VB Code Summary:

The VB code calculates the number of minutes between the “Actual Start” time and the “Actual Completion” time.

For the actual VB Code, please refer to Appendix C3.

Charts:

Title: Number of Activities by Status

Business Component: Action

Chart Summary: Displays number of activities (Y) categorized by the activity’s status (X).

Title: Number of Activities by Priority

Business Component: Action

Chart Summary: Displays number of activities (Y) categorized by the activity’s priority (X).

Title: Number of Activities by Due date

Business Component: Action

Chart Summary: Displays number of activities (Y) categorized by the activity's due date (X).

Literature

Summary:

The Siebel Vanilla Literature screen did not require customization. The Vanilla functionality and business component relationships fulfilled the client requirements.

Results

Summary:

The Results screen was based upon the Solution business component. Though the concept and logic of the Siebel Vanilla Solution screen was similar to the requirements of the OCTS Results screen, customization was required to specifically meet client needs. New data elements were required to facilitate the intake of all necessary result information. Pick applets were utilized to pick the values for the corresponding data elements. The details below illustrate the customization implemented for the Results applets. The majority of the views found within the Solution screen contain the Result detail as well as an applet based upon another screen (i.e., the Results screen). To understand the customization required for these results applets, please see the appropriate section of the customization report for the screen in question.

Data Mapping:

For a detailed mapping summary, please refer to Appendices A13-A14.

Picklists:

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

- Category
- Sub Category
- Status
- Proposed By (Contacts Table)
- Implemented By (Contacts Table)

For a list of the values in these picklists, please refer to Appendix B6.

VB Code:

VB code was written on the Solution SR/PD Business Component. This code was written in order to prevent user updates to the category and sub category fields where the user is establishing a new relationship to an existing result. In order to do this, a global variable was established. During a NewRecord or a CopyRecord, this global variable is set. If the user tries to change the category or

subcategory fields, the code checks the global variable to determine whether or not to accept the change. For detailed information regarding necessary VB coding, please refer to Appendix C5.

Calendar

Summary:

The Siebel Vanilla Calendar screen did not require customization. The Vanilla functionality and business component relationships fulfilled the client requirements.

SmartScript

Summary:

SmartScripts are designed to help the Intake Specialist gather data from a caller in an accurate and consistent manner. The client has expressed concern that many fields within OCTS 1.0 were not routinely populated. SmartScripts will help to facilitate this.

Based on answers to initial questions within the Greeting, one of 5 scripted scenarios will be executed. Siebel Vanilla was referenced for all scenarios. However, Scenarios 1 and 2 required customization using VB code in order to save a single field across the Account, Contact and Service Request business components. Scenarios 3, 4 and 5 required customization to achieve the same result. See the Siebel VB Code section for details.

Scripting Scenarios:

1. New Customer/New Case – Borrower Calls: Utilized to create a new case when the caller is the borrower and has not called the Office of the Ombudsman before.
2. New Customer/New Case – Third Party Calls: Utilized to create a new case when the caller is a third party and has not called the Office of the Ombudsman before.
3. Existing Customer/Existing Case – Status or Demographic Update: Utilized when an existing customer calls back to the Office of the Ombudsman to request a status update or make changes to information they provided earlier.
4. Existing Customer/New Case – Borrower Calls: Utilized when a customer exists in the database but is creating a new case. The caller is the borrower.
5. Existing Customer/New Case – Third Party Calls: Utilized when a customer exists in the database but is creating a new case. The caller is a third party.

For the actual questions used in each scenario, please refer to Appendices D1-D5.

VB Code

Siebel VB code was used extensively within all 5 scripts and appears at the script level and/or question level. It was required in order to save data across multiple business components, create data relationships, utilize pick-lists and pick-applets within script questions, populate questions dynamically, populate the dashboard, search the decision issues within the encyclopedia and to dynamically connect scripts together.

In Scenarios 1 and 2, individual script questions were used for each field to be populated. Many of these fields appeared in at least two of the three business components populated through scripting. Because of this there was a need to connect the answers to questions across all business components where the field appeared. VB code that did not exist in Siebel Vanilla was required for this at both the script and question levels.

For Scenario 3, no VB code was required.

For scenarios 4 and 5, pick applets were used to add new data and the connectivity between business components existed through the application. Although some VB code was required for this, much of it existed within Siebel Vanilla and was modified for OCTS 2.0 use.

For the actual VB Code, please refer to Appendix C4.

Assignment Manager

Summary:

Assignment manager was constructed using the Siebel Vanilla “Service Request” Assignment Object. Some workflow columns and assignment attributes were created to utilize fields not included in the Vanilla assignment object. Assignment rules and criteria were built; employee skills were identified, and workload rules were defined to determine to whom a case will be assigned.

Assignment Rules:

Referred By – “White House” or “Congressional Office”: The primary assignment rule, which overrides all others: if a case has a “referred by” value of “White House” or “Congressional Office,” the case will be assigned to Joyce DeMoss or other specified member of the Ombudsman Office.

The remainder of the rules are based upon the loan servicing agent:

Servicing Agent - “Unknown”: The client expressed concern that new cases often have the incorrect servicing agent listed. Since assignment manager will rely upon the “servicing agent” field to determine an appropriate owner of the case, this information must be entered correctly or the value of “unknown” must be selected until such time as NSLDS data is available on a regular basis. This is an important point to make in training: if the intake specialist is not confident that the correct servicing agent has been provided, then “unknown” should be selected. Any case with an “unknown” servicer will be assigned to Joyce DeMoss so that the appropriate servicing agent can be determined and the case can be assigned to the correct group.

Servicing Agent – “DCS”: The case will be assigned to a member of the DCS team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to the DCS team lead, Martha Windsor.

Servicing Agent – “Direct Loans”, loan type **NOT** “Direct Consolidation”: The case will be assigned to a member of the Direct Loan team (Chris Joy is only current team member). Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to the DCS team lead (Joyce Demoss).

Servicing Agent – “Direct Loans”, loan type - “Direct Consolidation”: The case will be assigned to a member of the DL Consolidation team, specifically Lisa Howell.

Servicing Agent – not “DCS,” “DL,” “Unknown”: The case will be assigned to a member of the NCS team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to Joyce DeMoss.

Appendices

Appendix A – Data Mapping

Appendix A1: Cases Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Application Generated
Y	N	Referred By	Source	ATTRIB_05	S_SRV_REQ_X		"SR_Source" picklist
N	Y	Last Name	Contact Last Name	LAST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	First Name	Contact First Name	FST_NAME	S_CONTACT		SR Contact Pick Applet
N	Y	Account	Account	NAME	S_ORG_EXT		OCTS SR Account Pick Applet
Y	N	Home Phone	Contact Business Phone	ATTRIB_03	S_SRV_REQ_X		User Entry
Y	Y	Original Issue Category	Version	ATTRIB_04	S_SRV_REQ_X		SR Area Pick Applet
Y	Y	Original Issue Sub Category	Severity	SR_SEV_CD	S_SRV_REQ		Hierarchical Pick Applet
Y	Y	Original Issue Summary	Original Issue Summary	ORIGINAL_ISSUE_SUMMARY	S_SRV_REQ_X		User Entry
Y	N	Revised Issue Category	Revised Category	SR_REPRODUCE	S_SRV_REQ		SR Area Pick Applet
Y	N	Revised Issue Sub Category	Priority	SR_PRIO_CD	S_SRV_REQ		Hierarchical Pick Applet
Y	N	Revised Issue Summary	Sub-Area	REVISED_ISSUE_SUMMARY	S_SRV_REQ_X		User Entry
N	N	Intake Person	Owned By Id	OWNER_EMP_ID	S_SRV_REQ		Application Populated
N	N	Status	Status	SR_STAT_ID	S_SRV_REQ		SR Status

							Pick Applet
N	N	Sub-Status	Sub_Status	SR_SUB_STAT_ID	S_SRV_REQ		SR Status Pick Applet
N	N	Ombudsman	Owner	LOGIN	S_SRV_REQ		Assignment Manager

Appendix A2: Cases List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N		Case #	SR Number	SR_NUM	S_SRV_REQ	Cases / Activities	Application Generated
Y		Referred By	Source	ATTRIB_05	S_SRV_REQ_X		"SR_Source" picklist
N	Y	Last Name	Contact Last Name	LAST_NAME	S_CONTACT	Contacts / Cases	SR Contact Pick Applet
N		First Name	Contact First Name	FST_NAME	S_CONTACT		SR Contact Pick Applet
N	Y	Account	Account	NAME	S_ORG_EXT	Accounts / Cases	OCTS SR Account Pick Applet
Y		Home Phone	Contact Business Phone	ATTRIB_03	S_SRV_REQ_X		User Entry
Y	Y	Original Issue Category	Version	ATTRIB_04	S_SRV_REQ_X		SR Area Pick Applet
Y	Y	Original Issue Sub Category	Severity	SR_SEV_CD	S_SRV_REQ		Hierarchical Pick Applet
Y	Y	Original Issue Summary	Original Issue Summary	ORIGINAL_ISSUE_SUMMARY	S_SRV_REQ_X		User Entry
Y		Revised Issue Category	Revised Category	SR_REPRODUCE	S_SRV_REQ		SR Area Pick Applet
Y		Revised Issue Sub Category	Priority	SR_PRIO_CD	S_SRV_REQ		Hierarchical Pick Applet
Y		Revised Issue Summary	Sub-Area	REVISED_ISSUE_SUMMARY	S_SRV_REQ_X		User Entry
N		Intake Person	Owned By Id	OWNER_EMP_ID	S_SRV_REQ		Application Populated
N		Status	Status	SR_STAT_ID	S_SRV_REQ		SR Status Pick Applet
N		Sub-Status	Sub_Status	SR_SUB_STAT_ID	S_SRV_REQ		SR Status

							Pick Applet
N		Ombudsman	Owner	LOGIN	S_EMPLOYEE		Assignment Manager
N		Date Received	Created	System Generated Field	N/A		Application Populated
N		Date Closed	Closed Date	ACT_CLOSE_DT	S_SRV_REQ		User Entry/Calendar
Y		Customer Expectation Category	Customer Category	SR_DATABASE	S_SRV_REQ		SR Area Pick Applet
Y		Customer Expectation Sub Category	Resolution Code	RESOLUTION_CD	S_SRV_REQ		SR Status Pick Applet
Y		Customer Expectation Summary	Abstract	CUSTOMER_EXPECT_SUMMARY	S_SRV_REQ_X		User Entry
Y		Web Notes	Description	CLOSED_NOTES	S_SRV_REQ_X		User Entry
N		Date Modified	Updated	System Generated Field	N/A		Application Populated
Y		Servicing Agency	Servicing Agency	ATTRIB_01	S_SRV_REQ_X		OCTS Servicing Agency PickList
Y		Loan Type	Product	NAME	S_PROD_INT		PickList SR Internal Product
Y	Y	Loan Status	Loan Status	ATTRIB_40	S_SRV_REQ_X		OCTS Loan Status PickList

Appendix A3: Issues Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Issue #	Issue Number	DEFECT_NUM	S_PROD_DEFECT		Application Generated
Y	Y	Issue Category	OI Category	ATTRIB_01	S_PROD_DEFECT_X		SR Area Pick Applet
Y	Y	Issue Sub Category	OI Sub Category	ATTRIB_02	S_PROD_DEFECT_X		SR Sub Area Hierarchical Pick Applet
Y	N	Issue Summary	OI Summary	ATTRIB_47	S_PROD_DEFECT_X		User Entry
N	N	Intake	Created By Name	LOGIN	CREATED BY PERSON system field		Application Populated
N	Y	Status	Status	STATUS_CD	S_PROD_DEFECT		PickList SR Status
N	Y	Sub-Status	Sub_Status	SUB_STATUS_CD	S_PROD_DEFECT		PickList PD Sub-Status
N	N	Ombudsman	Owner	LOGIN	S_EMPLOYEE		Application Populated
N	N	Date Received	Date Opened	OPEN_DT	S_PROD_DEFECT		Application Populated
N	N	Date Closed	Date Closed	CLOSE_DT	S_PROD_DEFECT		User Entry/Calendar
N	N	Close Notes	Description	DESC_TEXT	S_PROD_DEFECT		User Entry
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Application Populated

Appendix A4: Issues List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Issue #	Issue Number	DEFECT_NUM	S_PROD_DEFECT		Application Generated
Y	Y	Issue Category	OI Category	ATTRIB_01	S_PROD_DEFECT_X		SR Area Pick Applet
Y	Y	Issue Sub Category	OI Sub Category	ATTRIB_02	S_PROD_DEFECT_X		SR Sub Area Hierarchical Pick Applet
Y	N	Issue Summary	OI Summary	ATTRIB_47	S_PROD_DEFECT_X		User Entry
N	N	Intake	Created By Name	LOGIN	CREATED BY PERSON system field		Application Populated
N	Y	Status	Status	STATUS_CD	S_PROD_DEFECT		PickList SR Status
N	Y	Sub-Status	Sub_Status	SUB_STATUS_CD	S_PROD_DEFECT		PickList PD Sub-Status
N	N	Ombudsman	Owner	LOGIN	S_EMPLOYEE		Application Populated
N	N	Date Received	Date Opened	OPEN_DT	S_PROD_DEFECT		Application Populated
N	N	Date Closed	Date Closed	CLOSE_DT	S_PROD_DEFECT		User Entry/Calendar
N	N	Close Notes	Description	DESC_TEXT	S_PROD_DEFECT		User Entry
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Application Populated

Appendix A5: OCTS Account Entry Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
Y	N	Last NM	Last Name	ATTRIB_34	S_ORG_EXT_X		User Entry
Y	N	First NM	First Name	ATTRIB_38	S_ORG_EXT_X		User Entry
Y	N	MI	Middle Name	ATTRIB_05	S_ORG_EXT_X		User Entry
Y	N	Preferred	Preferred Name	ATTRIB_37	S_ORG_EXT_X		User Entry
Y	N	Prefix	M/M	ATTRIB_06	S_ORG_EXT_X		PickList MrMs
Y	N	Suffix	Suffix	ATTRIB_07	S_ORG_EXT_X		OCTS Suffix Picklist
N	N	Account Type	Type	OU_TYPE_CD	S_ORG_EXT		PickList Account Type
N	Y	Account	Name	NAME	S_ORG_EXT		User Entry
Y	N	DOB	Birth Date	EXCH_DT	S_ORG_EXT		User Entry/Calendar
N	N	Address	Street Address	ADDR	S_ADDR_ORG		User Entry
N	N	City	City	CITY	S_ADDR_ORG		User Entry
N	N	State	State	STATE	S_ADDR_ORG		PickList State
Y	N	Zip	Postal Code	ZIPCODE	S_ADDR_ORG		User Entry
Y	N	Country	Country	COUNTRY	S_ADDR_ORG		PickList Country
N	N	Site	Location	LOC	S_ORG_EXT		User Entry
Y	N	Country Code	Assignment Country Code	ASGN_PH_CC	S_ORG_EXT		User Entry
Y	N	Home Phone Number	Main Phone Number	MAIN_PH_NUM	S_ORG_EXT		User Entry
N	N	Work Phone Number	Work Phone Number	PH_NUM	S_ADDR_ORG		User Entry
Y	N	Fax Phone Number	Main Fax Number	MAIN_FAX_PH_	S_ORG_EXT		User Entry

				NUM			
Y	N	Mobile Phone Number	Mobile Phone Number	FAX_PH_NUM	S_ADDR_ORG		User Entry
Y	N	1st E-mail	Home Page	URL	S_ORG_EXT		User Entry
Y	N	2nd E-mail	Secondary Email	EMAIL_ADDR	S_ADDR_ORG		User Entry
Y	N	Hours Available	Hrs Avail	ATTRIB_01	S_ORG_EXT_X		User Entry
Y	N	Time Zone	Time Zone	TAX_EXEMPT_NUM	S_ORG_EXT		PickList TimeZone
N	Y	Contact Method	Contact Method	ATTRIB_39	S_ORG_EXT_X		OCTS Contact Method Picklist
N	N	Comments	Description	DESC_TEXT	S_ORG_EXT		User Entry
N	N	Reminders	Reminders	ATTRIB_36	S_ORG_EXT_X		Siebel VB Code

Appendix A6: OCTS Account List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
Y	N	Last NM	Last Name	ATTRIB_34	S_ORG_EXT_X		User Entry
Y	N	First NM	First Name	ATTRIB_38	S_ORG_EXT_X		User Entry
Y	N	MI	Middle Name	ATTRIB_05	S_ORG_EXT_X		User Entry
Y	N	Preferred	Preferred Name	ATTRIB_37	S_ORG_EXT_X		User Entry
Y	N	Prefix	M/M	ATTRIB_06	S_ORG_EXT_X		PickList MrMs
Y	N	Suffix	Suffix	ATTRIB_07	S_ORG_EXT_X		OCTS Suffix Picklist
N	N	Account Type	Type	OU_TYPE_CD	S_ORG_EXT		PickList Account Type
N	Y	Account	Name	NAME	S_ORG_EXT	Account/Cases	User Entry
Y	N	DOB	Birth Date	EXCH_DT	S_ORG_EXT		User Entry/Cale ndar
N	N	Address	Street Address	ADDR	S_ADDR_ORG		User Entry
N	N	City	City	CITY	S_ADDR_ORG		User Entry
N	N	State	State	STATE	S_ADDR_ORG		PickList State
Y	N	Zip	Postal Code	ZIPCODE	S_ADDR_ORG		User Entry
Y	N	Country	Country	COUNTRY	S_ADDR_ORG		PickList Country
N	N	Site	Location	LOC	S_ORG_EXT		User Entry
Y	N	Country Code	Assignment Country Code	ASGN_PH_CC	S_ORG_EXT		User Entry
Y	N	Home Phone Number	Main Phone Number	MAIN_PH_NUM	S_ORG_EXT		User Entry
N	N	Work Phone Number	Work Phone Number	PH_NUM	S_ADDR_ORG		User Entry
Y	N	Fax Phone Number	Main Fax Number	MAIN_FAX_PH_	S_ORG_EXT		User Entry

				NUM			
Y	N	Mobile Phone Number	Mobile Phone Number	FAX_PH_NUM	S_ADDR_ORG		User Entry
Y	N	1st E-mail	Home Page	URL	S_ORG_EXT		User Entry
Y	N	2nd E-mail	Secondary Email	EMAIL_ADDR	S_ADDR_ORG		User Entry
Y	N	Hours Available	Hrs Avail	ATTRIB_01	S_ORG_EXT_X		User Entry
Y	N	Time Zone	Time Zone	TAX_EXEMPT_NUM	S_ORG_EXT		PickList TimeZone
N	Y	Contact Method	Contact Method	ATTRIB_39	S_ORG_EXT_X		OCTS Contact Method Picklist
N	N	Comments	Description	DESC_TEXT	S_ORG_EXT		User Entry
N	N	Reminders	Reminders	ATTRIB_36	S_ORG_EXT_X		Siebel VB Code

Appendix A7: Loan Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	No Display	Loan Type Cd	NAME	S_PROD_INT		Interface/ Conversion
N	N	Product Id/Product Name	Product Id/Product Name	PROD_ID	S_ASSET		Interface/ Conversion
Y	N	Guaranty Amount	Guaranty Amount	ATTRIB_18	S_ASSET_X		Interface/ Conversion
Y	N	Guaranty Amount Cd	Guaranty Amount Cd	ATTRIB_04	S_ASSET_X		Interface/ Conversion
Y	N	Academic Level Cd	Academic Level Cd	ATTRIB_05	S_ASSET_X		Interface/ Conversion
Y	N	Interest Rate Cd	Interest Rate Cd	ATTRIB_06	S_ASSET_X		Interface/ Conversion
Y	N	Loan Status Cd	Loan Status Cd	ATTRIB_07	S_ASSET_X		Interface/ Conversion
N	N	Enrollment Cd	Enrollment Cd	BUILD	S_ASSET		Interface/ Conversion
N	N	No Display	Loan Seq No	SERIAL_NUM	S_ASSET		Interface/ Conversion
N	N	Lender Cd	Lender Cd	REF_NUMBER_1	S_ASSET		Interface/ Conversion
N	N	Lender Servicer Cd	Lender Servicer Cd	REF_NUMBER_2	S_ASSET		Interface/ Conversion
N	N	School Type	School Type	REF_NUMBER_3	S_ASSET		Interface/ Conversion
Y	N	Program Length	Program Length	ATTRIB_34	S_ASSET_X		Interface/ Conversion
Y	N	No Display	OPEID	ATTRIB_35	S_ASSET_X		Interface/ Conversion
Y	N	Interest Rate Type	Interest Rate Type	ATTRIB_36	S_ASSET_X		Interface/

							Conversion
Y	N	Program Length Descr	Program Length Descr	ATTRIB_37	S_ASSET_X		Interface/ Conversion
Y	N	School Type Descr	School Type Descr	ATTRIB_38	S_ASSET_X		Interface/ Conversion
N	N	No Display	Product Description	DESC_TEXT	S_ASSET		Interface/ Conversion
N	N	Primary Contact Id	Primary Contact Id	PR_CON_ID	S_ASSET		Interface/ Conversion
Y	N	Guaranty Agency Name	Guaranty Agency Name	ATTRIB_40	S_ASSET_X		Interface/ Conversion
Y	N	Lender Name	Lender Name	ATTRIB_41	S_ASSET_X		Interface/ Conversion
Y	N	Academic Level Name	Academic Level Name	ATTRIB_42	S_ASSET_X		Interface/ Conversion
Y	N	Loan Status Descr	Loan Status Descr	ATTRIB_43	S_ASSET_X		Interface/ Conversion
Y	N	No Display	School Location	ATTRIB_01	S_ASSET_X		Interface/ Conversion
N	N	Data Provider Loan Id	Data Provider Loan Id	OWNER_ASSET_NUM	S_ASSET		Interface/ Conversion
N	N	Birth Date	Birth Date	BIRTH_DT	S_CONTACT.		Interface/ Conversion
N	N	Guaranty Date	Guaranty Date	INSTALL_DT	S_ASSET		Interface/ Conversion
Y	N	Outstanding Principal Balance Date	Outstanding Principal Balance Date	ATTRIB_26	S_ASSET_X		Interface/ Conversion
Y	N	Outstanding Interest Balance Date	Outstanding Interest Balance Date	ATTRIB_27	S_ASSET_X		Interface/ Conversion
N	N	Disbursement Date	Disbursement Date	SHIP_DT	S_ASSET		Interface/ Conversion
Y	N	Cancellation Date	Cancellation Date	ATTRIB_28	S_ASSET_X		Interface/ Conversion
N	N	GA Resp Begin	GA Resp Begin Date	START_DT	S_ASSET		Interface/

		Date					Conversion
N	N	GA Resp End Date	GA Resp End Date	END_DT	S_ASSET		Interface/ Conversion
Y	N	Lender Resp Begin Date	Lender Resp Begin Date	ATTRIB_29	S_ASSET_X		Interface/ Conversion
Y	N	Lender Resp End Date	Lender Resp End Date	ATTRIB_30	S_ASSET_X		Interface/ Conversion
Y	N	Lender Servicer Resp Begin Date	Lender Servicer Resp Begin Date	ATTRIB_12	S_ASSET_X		Interface/ Conversion
Y	N	Lender Servicer Resp End Date	Lender Servicer Resp End Date	ATTRIB_13	S_ASSET_X		Interface/ Conversion
Y	N	Loan Status Date	Loan Status Date	ATTRIB_31	S_ASSET_X		Interface/ Conversion
Y	N	Enrollment Effective Date	Enrollment Effective Date	ATTRIB_32	S_ASSET_X		Interface/ Conversion
Y	N	Anticipated Completion Date	Anticipated Completion Date	ATTRIB_33	S_ASSET_X		Interface/ Conversion
N	N	Date Entered Repayment	Date Entered Repayment	REGISTERED_DT	S_ASSET		Interface/ Conversion
N	N	Period Begin Date	Period Begin Date	WARRANTY_START_DT	S_ASSET		Interface/ Conversion
N	N	Period End Date	Period End Date	WARRANTY_END_DT	S_ASSET		Interface/ Conversion
Y	N	Interest Rate	Interest Rate	ATTRIB_14	S_ASSET_X		Interface/ Conversion
Y	N	Outstanding Principal Balance	Outstanding Principal Balance	ATTRIB_15	S_ASSET_X		Interface/ Conversion
Y	N	Outstanding Interest Balance	Outstanding Interest Balance	ATTRIB_16	S_ASSET_X		Interface/ Conversion
N	N	Total Disbursed	Total Disbursed	QTY	S_ASSET		Interface/ Conversion
Y	N	Total Cancelled	Total Cancelled	ATTRIB_17	S_ASSET_X		Interface/ Conversion
Y	N	Current Lender Servicer Name	Current Lender Servicer Name	ATTRIB_02	S_ASSET_X		Interface/ Conversion

Appendix A8: Loan List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Product Id/Product Name	Product Id/Product Name	PROD_ID	S_ASSET		Interface/Conversion
Y	N	Guaranty Amount	Guaranty Amount	ATTRIB_18	S_ASSET_X		Interface/Conversion
Y	N	Guaranty Amount Cd	Guaranty Amount Cd	ATTRIB_04	S_ASSET_X		Interface/Conversion
Y	N	Academic Level Cd	Academic Level Cd	ATTRIB_05	S_ASSET_X		Interface/Conversion
Y	N	Interest Rate Cd	Interest Rate Cd	ATTRIB_06	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Cd	Loan Status Cd	ATTRIB_07	S_ASSET_X		Interface/Conversion
N	N	Enrollment Cd	Enrollment Cd	BUILD	S_ASSET		Interface/Conversion
N	N	Loan Seq No	Loan Seq No	SERIAL_NUM	S_ASSET		Interface/Conversion
N	N	Lender Cd	Lender Cd	REF_NUMBER_1	S_ASSET		Interface/Conversion
N	N	Lender Servicer Cd	Lender Servicer Cd	REF_NUMBER_2	S_ASSET		Interface/Conversion
N	N	School Type	School Type	REF_NUMBER_3	S_ASSET		Interface/Conversion
Y	N	Program Length	Program Length	ATTRIB_34	S_ASSET_X		Interface/Conversion
Y	N	OPEID	OPEID	ATTRIB_35	S_ASSET_X		Interface/Conversion
Y	N	Interest Rate Type	Interest Rate Type	ATTRIB_36	S_ASSET_X		Interface/Conversion
Y	N	Program Length	Program Length Descr	ATTRIB_37	S_ASSET_X		Interface/Con

		Descr					version
Y	N	School Type Descr	School Type Descr	ATTRIB_38	S_ASSET_X		Interface/Conversion
N	N	Product Description	Product Description	DESC_TEXT	S_ASSET		Interface/Conversion
N	N	Primary Contact Id	Primary Contact Id	PR_CON_ID	S_ASSET		Interface/Conversion
Y	N	Guaranty Agency Name	Guaranty Agency Name	ATTRIB_40	S_ASSET_X		Interface/Conversion
Y	N	Lender Name	Lender Name	ATTRIB_41	S_ASSET_X		Interface/Conversion
Y	N	Academic Level Name	Academic Level Name	ATTRIB_42	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Descr	Loan Status Descr	ATTRIB_43	S_ASSET_X		Interface/Conversion
Y	N	School Location	School Location	ATTRIB_01	S_ASSET_X		Interface/Conversion
N	N	Data Provider Loan Id	Data Provider Loan Id	OWNER_ASSET_NUM	S_ASSET		Interface/Conversion
N	N	Birth Date	Birth Date	BIRTH_DT	S_CONTACT.		Interface/Conversion
N	N	Guaranty Date	Guaranty Date	INSTALL_DT	S_ASSET		Interface/Conversion
Y	N	Outstanding Principal Balance Date	Outstanding Principal Balance Date	ATTRIB_26	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Interest Balance Date	Outstanding Interest Balance Date	ATTRIB_27	S_ASSET_X		Interface/Conversion
N	N	Disbursement Date	Disbursement Date	SHIP_DT	S_ASSET		Interface/Conversion
Y	N	Cancellation Date	Cancellation Date	ATTRIB_28	S_ASSET_X		Interface/Conversion
N	N	GA Resp Begin Date	GA Resp Begin Date	START_DT	S_ASSET		Interface/Conversion
N	N	GA Resp End Date	GA Resp End Date	END_DT	S_ASSET		Interface/Con

							version
Y	N	Lender Resp Begin Date	Lender Resp Begin Date	ATTRIB_29	S_ASSET_X		Interface/Conversion
Y	N	Lender Resp End Date	Lender Resp End Date	ATTRIB_30	S_ASSET_X		Interface/Conversion
Y	N	Lender Servicer Resp Begin Date	Lender Servicer Resp Begin Date	ATTRIB_12	S_ASSET_X		Interface/Conversion
Y	N	Lender Servicer Resp End Date	Lender Servicer Resp End Date	ATTRIB_13	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Date	Loan Status Date	ATTRIB_31	S_ASSET_X		Interface/Conversion
Y	N	Enrollment Effective Date	Enrollment Effective Date	ATTRIB_32	S_ASSET_X		Interface/Conversion
Y	N	Anticipated Completion Date	Anticipated Completion Date	ATTRIB_33	S_ASSET_X		Interface/Conversion
N	N	Date Entered Repayment	Date Entered Repayment	REGISTERED_DT	S_ASSET		Interface/Conversion
N	N	Period Begin Date	Period Begin Date	WARRANTY_START_DT	S_ASSET		Interface/Conversion
N	N	Period End Date	Period End Date	WARRANTY_END_DT	S_ASSET		Interface/Conversion
Y	N	Interest Rate	Interest Rate	ATTRIB_14	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Principal Balance	Outstanding Principal Balance	ATTRIB_15	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Interest Balance	Outstanding Interest Balance	ATTRIB_16	S_ASSET_X		Interface/Conversion
N	N	Total Disbursed	Total Disbursed	QTY	S_ASSET		Interface/Conversion
Y	N	Total Cancelled	Total Cancelled	ATTRIB_17	S_ASSET_X		Interface/Conversion
Y	N	Current Lender Servicer Name	Current Lender Servicer Name	ATTRIB_02	S_ASSET_X		Interface/Conversion

Appendix A9: Contact Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Last NM	Last Name	LAST_NAME	S_CONTACT		Pick Map/User Entry
N	Y	First NM	First Name	FST_NAME	S_CONTACT		Pick Map/User Entry
N	N	MI	Middle Name	MID_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Preferred	Alias	ALIAS_NAME	S_CONTACT		Pick Map/User Entry
N	N	Prefix	M/M	PER_TITLE	S_CONTACT		Pick Map/'PickList MrMs' - Picklist
Y	N	Suffix	Suffix	PER_TITLE_SUFFIX	S_CONTACT		Pick Map/'OCTS Suffix Picklist' - Picklist
Y	N	Contact Type	Contact Type	CON_CD	S_CONTACT		'OCTS Contact Type Picklist' - Picklist
N	N	Account	Account	NAME	S_ORG_EXT		'OCTS Account Pick Applet' - Pick Applet
Y	Y	Relationship/Title	Job Title	JOB_TITLE	S_CONTACT		'OCTS Relationship to Case/Issue' - Picklist
N	N	Address	Address	ATTRIB_47	S_CONTACT_X		Pick Map/User Entry
N	N	City	Contact City	MAIDEN_NAME	S_CONTACT		Pick Map/User Entry
N	N	State	Contact State	NATIONALITY	S_CONTACT		Pick Map/'PickList State' - Picklist
N	N	Zip	Zip Code	EMP_NUM	S_CONTACT		Pick Map/User Entry
N	N	Country	Contact Country	EMPLMNT_STAT_CD	S_CONTACT		Pick Map/'PickList Country' - Picklist
Y	N	Country Code	Country Code	ALT_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Home Phone Number	Home Phone #	HOME_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Work Phone Number	Work Phone #	WORK_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Fax Phone Number	Fax Phone #	FAX_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Mobile Phone	Cellular Phone #	CELL_PH_NUM	S_CONTACT		Pick Map/User Entry

		Number					
N	N	1st E-mail	Email Address	EMAIL_ADDR	S_CONTACT		Pick Map/User Entry
Y	N	2nd E-mail	Secondary Email	NICK_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Hours Available	Hrs Avail	CON_MANAGER_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Time Zone	Time Zone	TMZONE_CD	S_CONTACT		Pick Map/'PickList TimeZone' - Picklist
Y	Y	Contact Method	Assistant	CON_ASST_NAME	S_CONTACT		Pick Map/'OCTS Contact Method Picklist' - Picklist
Y	N	Special Note/SME	Comment	COMMENTS	S_CONTACT		User Entry
N	Y						

Appendix A10: Contact List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Last NM	Last Name	LAST_NAME	S_CONTACT	Contacts/ Activities	Pick Map/User Entry
N	Y	First NM	First Name	FST_NAME	S_CONTACT		Pick Map/User Entry
N	N	MI	Middle Name	MID_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Preferred	Alias	ALIAS_NAME	S_CONTACT		Pick Map/User Entry
N	N	Prefix	M/M	PER_TITLE	S_CONTACT		Pick Map/'PickList MrMs' - Picklist
Y	N	Suffix	Suffix	PER_TITLE_SUFFIX	S_CONTACT		Pick Map/'OCTS Suffix Picklist' - Picklist
Y	N	Contact Type	Contact Type	CON_CD	S_CONTACT		'OCTS Contact Type Picklist' - Picklist
N	N	Account	Account	NAME	S_ORG_EXT	Account/ Contacts	'OCTS Account Pick Applet' - Pick Applet

Y	Y	Relationship/Title	Job Title	JOB_TITLE	S_CONTACT		'OCTS Relationship to Case/Issue' - Picklist
N	N	Address	Address	ATTRIB_47	S_CONTACT_X		Pick Map/User Entry
N	N	City	Contact City	MAIDEN_NAME	S_CONTACT		Pick Map/User Entry
N	N	State	Contact State	NATIONALITY	S_CONTACT		Pick Map/'PickList State' - Picklist
N	N	Zip	Zip Code	EMP_NUM	S_CONTACT		Pick Map/User Entry
N	N	Country	Contact Country	EMPLMNT_STAT_CD	S_CONTACT		Pick Map/'PickList Country' - Picklist
Y	N	Country Code	Country Code	ALT_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Home Phone Number	Home Phone #	HOME_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Work Phone Number	Work Phone #	WORK_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Fax Phone Number	Fax Phone #	FAX_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Mobile Phone Number	Cellular Phone #	CELL_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	1st E-mail	Email Address	EMAIL_ADDR	S_CONTACT		Pick

							Map/User Entry
Y	N	2nd E-mail	Secondary Email	NICK_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Hours Available	Hrs Avail	CON_MANAGER_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Time Zone	Time Zone	TMZONE_CD	S_CONTACT		Pick Map/'PickList TimeZone' - Picklist
Y	Y	Contact Method	Assistant	CON_ASST_NAME	S_CONTACT		Pick Map/'OCTS Contact Method Picklist' - Picklist
Y	N	Special Note/SME	Comment	COMMENTS	S_CONTACT		User Entry

Appendix A11: Activities Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Activity Type	Type	TODO_CD	S_EVT_ACT		PickList Action Type
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Pick Map
N	Y	Description	Description	NAME	S_EVT_ACT		User Entered
N	N	Last Name	Contact Last Name	LAST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	First Name	Contact First Name	FST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	Account	Account Name	NAME	S_ORG_EXT		OCTS SR Account Pick Applet
N	N	Site	Account Location	LOC	S_ORG_EXT		Pick Map
N	N	Created	Created	System Generated Field	N/A		Application Populated
N	N	Priority	Priority	EVT_PRIORITY_C D	S_EVT_ACT		PickList Activity Priority
N	N	Status	Status	EVT_STAT_CD	S_EVT_ACT		PickList Action Status
N	Y	Assigned To	Owned By	OWNER_LOGIN	S_EVT_ACT		PickList Owned By
N	N	Due	Start Date	APPT_START_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Start	Planned	TODO_PLAN_ST ART_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Completion	Planned Completion	TODO_PLAN_EN D_DT	S_EVT_ACT		User Entry / Calendar
N	N	Actual Start	Started	TODO_ACTL_ST ART_DT	S_EVT_ACT		User Entry / Calendar

N	N	Actual Completion	Done	TODO_ACTL_EN D_DT	S_EVT_ACT		User Entry / Completion
Y	N	Duration	Duration Minutes	ACD_CALL_DUR ATION	S_EVT_ACT		Calculated
Y	N	Comments	Comment	COMMENTS	S_EVT_ACT		User Entry

Appendix A12: Activities List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Activity Type	Type	TODO_CD	S_EVT_ACT	Activities / Attachments	PickList Action Type
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Pick Map
N	Y	Description	Description	NAME	S_EVT_ACT		User Entered
N	N	Last Name	Contact Last Name	LAST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	First Name	Contact First Name	FST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	Created By	Created By Name	CREATOR_LOGIN	S_EVT_ACT		
N	N	Account	Account Name	NAME	S_ORG_EXT		OCTS SR Account Pick Applet
N	N	Site	Account Location	LOC	S_ORG_EXT		Pick Map
N	N	Created	Created	System Generated Field	N/A		Application Populated
N	N	Priority	Priority	EVT_PRIORITY_CD	S_EVT_ACT		PickList Activity Priority
N	N	Status	Status	EVT_STAT_CD	S_EVT_ACT		PickList Action Status
N	Y	Assigned To	Owned By	OWNER_LOGIN	S_EVT_ACT		PickList Owned By
N	N	Due	Start Date	APPT_START_DT	S_EVT_ACT		User Entry / Calendar

N	N	Planned Start	Planned	TODO_PLAN_ST ART_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Completion	Planned Completion	TODO_PLAN_EN D_DT	S_EVT_ACT		User Entry / Calendar
N	N	Actual Start	Started	TODO_ACTL_ST ART_DT	S_EVT_ACT		User Entry / Calendar
N	N	Actual Completion	Done	TODO_ACTL_EN D_DT	S_EVT_ACT		User Entry / Completion
Y	N	Duration	Duration Minutes	ACD_CALL_DUR ATION	S_EVT_ACT		Calculated
Y	N	Comments	Comment	COMMENTS	S_EVT_ACT		User Entry
N	Y	New	Row Status	ROW_STATUS	S_EVT_ACT		Application Populated

Appendix A13: Results Form Applet (Case and Issues Screens) Data Mapping

Case Results Form Applet – The following extension columns were added to the S_SR_RESITEM table:

- X_EFFECTING_DT
- X_EFFECTING_FIRST_NAME
- X_EFFECTING_LAST_NAME
- X_PROPOSING_DT
- X_PROPOSING_FIRST_NAME
- X_PROPOSING_LAST_NAME
- X_STATUS

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Name	Name	NAME	S_RESITEM		User Entry
Y	Y	Category	Category	RESITEM_TYPE	S_RESITEM		SR Area Pick Applet
Y	Y	Sub Category	Sub Category	FILE_SRC_TYPE	S_RESITEM		SR Sub-Area Hierarchical Pick Applet
Y	N	Implemented By	OCTS SR Effecting Last Name OCTS SR Effecting First Name	X_EFFECTING_LAST_NAME X_EFFECTING_FIRST_NAME	S_SR_RESITEM		User Entry
Y	N	Date Proposed	OCTS SR Proposing Dt	X_PROPOSING_DT	S_SR_RESITEM		User Entry
Y	N	Proposed By	OCTS SR Proposing Last Name OCTS SR Proposing First Name	X_PROPOSING_LAST_NAME X_PROPOSING_FIRST_NAME	S_SR_RESITEM		User Entry
Y	N	Acceptance Deadline	OCTS SR Effecting Dt	X_EFFECTING_DT	S_SR_RESITEM		User Entry

N	N	Comments	SR Comments	COMMENTS	S_SR_RESITE M		User Entry
N	N	Result	Solution	RESOLUTION_T XT	S_RESITEM		User Entry
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Created	Created	System Generated	N/A		Application Populated
Y	N	FAQ	FAQ	FAQ_QUES_TEXT	S_RESITEM		Application Populated
N	N	Status	OCTS SR Status	X_STATUS	S_SR_RESITE M		PickList Solution Status

Issue Results Form Applet - The following extension columns were added to the S_DFCT_RESITEM table:

- X_EFFECTING_DT
- X_EFFECTING_FIRST_NAME
- X_EFFECTING_LAST_NAME
- X_PROPOSING_DT
- X_PROPOSING_FIRST_NAME
- X_PROPOSING_LAST_NAME
- X_STATUS

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Name	Name	NAME	S_RESITEM		User Entry
Y	Y	Category	Category	RESITEM_TYPE	S_RESITEM		SR Area Pick Applet
Y	Y	Sub Category	Sub Category	FILE_SRC_TYPE	S_RESITEM		SR Sub-Area Hierarchical Pick Applet
Y	N	Implemented By	OCTS PD Effecting Last Name OCTS PD Effecting First Name	X_EFFECTING_LAST_NAME X_EFFECTING_FIRST_NAME	S_DFCT_RESITEM		User Entry
Y	N	Date Proposed	OCTS PD Proposing Dt	X_PROPOSING_DT	S_DFCT_RESITEM		User Entry
Y	N	Proposed By	OCTS PD Proposing Last Name OCTS PD Proposing First Name	X_PROPOSING_LAST_NAME X_PROPOSING_FIRST_NAME	S_DFCT_RESITEM		User Entry
Y	N	Acceptance Deadline	OCTS PD Effecting Dt	X_EFFECTING_DT	S_DFCT_RESITEM		User Entry
N	N	Comments	PD Comments	COMMENTS	S_DFCT_RESITEM		User Entry
N	N	Result	Solution	RESOLUTION_TE	S_RESITEM		User Entry

				XT			
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Created	Created	System Generated	N/A		Application Populated
Y	N	FAQ	FAQ	FAQ_QUES_TEXT	S_RESITEM		Application Populated
N	N	Status	OCTS PD Status	X_STATUS	S_DFCT_RESITEM		PickList Solution Status

Appendix A14: Results List Applet (Cases and Issues Screens) Data Mapping

Case Results List Applet - The following extension columns were added to the S_SR_RESITEM table:

- X_EFFECTING_DT
- X_EFFECTING_FIRST_NAME
- X_EFFECTING_LAST_NAME
- X_PROPOSING_DT
- X_PROPOSING_FIRST_NAME
- X_PROPOSING_LAST_NAME
- X_STATUS

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Name	Name	NAME	S_RESITEM		User Entry
Y	Y	Category	Category	RESITEM_TYPE	S_RESITEM		SR Area Pick Applet
Y	Y	Sub Category	Sub Category	FILE_SRC_TYPE	S_RESITEM		SR Sub-Area Hierarchical Pick Applet
Y	N	Implemented By	OCTS SR Effecting Last Name OCTS SR Effecting First Name	X_EFFECTING_LAST_NAME X_EFFECTING_FIRST_NAME	S_SR_RESITEM		User Entry
Y	N	Date Proposed	OCTS SR Proposing Dt	X_PROPOSING_DT	S_SR_RESITEM		User Entry
Y	N	Proposed By	OCTS SR Proposing Last Name OCTS SR Proposing First Name	X_PROPOSING_LAST_NAME X_PROPOSING_FIRST_NAME	S_SR_RESITEM		User Entry
Y	N	Acceptance Deadline	OCTS SR Effecting Dt	X_EFFECTING_DT	S_SR_RESITEM		User Entry

N	N	Comments	SR Comments	COMMENTS	S_SR_RESITE M		User Entry
N	N	Result	Solution	RESOLUTION_T XT	S_RESITEM		User Entry
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Created	Created	System Generated	N/A		Application Populated
Y	N	FAQ	FAQ	FAQ_QUES_TEXT	S_RESITEM		Application Populated
N	N	Status	OCTS SR Status	X_STATUS	S_SR_RESITE M		PickList Solution Status

Issue Results List Applet - The following extension columns were added to the S_DFCT_RESITEM table:

- X_EFFECTING_DT
- X_EFFECTING_FIRST_NAME
- X_EFFECTING_LAST_NAME
- X_PROPOSING_DT
- X_PROPOSING_FIRST_NAME
- X_PROPOSING_LAST_NAME
- X_STATUS

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Name	Name	NAME	S_RESITEM		User Entry
Y	Y	Category	Category	RESITEM_TYPE	S_RESITEM		SR Area Pick Applet
Y	Y	Sub Category	Sub Category	FILE_SRC_TYPE	S_RESITEM		SR Sub-Area Hierarchical Pick Applet
Y	N	Implemented By	OCTS PD Effecting Last Name OCTS PD Effecting First Name	X_EFFECTING_LAST_NAME X_EFFECTING_FIRST_NAME	S_DFCT_RESITEM		User Entry
Y	N	Date Proposed	OCTS PD Proposing Dt	X_PROPOSING_DT	S_DFCT_RESITEM		User Entry
Y	N	Proposed By	OCTS PD Proposing Last Name OCTS PD Proposing First Name	X_PROPOSING_LAST_NAME X_PROPOSING_FIRST_NAME	S_DFCT_RESITEM		User Entry
Y	N	Acceptance Deadline	OCTS PD Effecting Dt	X_EFFECTING_DT	S_DFCT_RESITEM		User Entry
N	N	Comments	PD Comments	COMMENTS	S_DFCT_RESITEM		User Entry
N	N	Result	Solution	RESOLUTION_TE	S_RESITEM		User Entry

				XT			
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Created	Created	System Generated	N/A		Application Populated
Y	N	FAQ	FAQ	FAQ_QUES_TEXT	S_RESITEM		Application Populated
N	N	Status	OCTS PD Status	X_STATUS	S_DFCT_RESITEM		PickList Solution Status

Appendix B - Picklists

Appendix B2: Issues Picklists

Picklist Display Name: Issue Category

Picklist Name: PickList SR Area

Values:

Account Balance	Discharge - Death	<u>Pell Grant*</u>
<u>Balance Dispute*</u>	Discharge Denied	<u>Quality of Education*</u>
<u>Bankruptcy*</u>	Due Diligence	<u>Repayment Plans/Amounts*</u>
<u>Closed School*</u>	False Certification	<u>School Refund*</u>
<u>Collection Practices*</u>	<u>Forbearance*</u>	<u>Service Quality*</u>
<u>Consolidation*</u>	Forbearance Rejected	<u>Social Security Number*</u>
Credit Bureau Report	<u>Loan Cancellation*</u>	Student Eligibility
<u>Credit Report*</u>	<u>Loan Discharge*</u>	Tax Offset
<u>Default*</u>	Loan Servicing	<u>Tax Refund Offset*</u>
<u>Deferment*</u>	<u>NSLDS*</u>	
Disability Discharge	Other	

* This category has a sub-category picklist with values other than “None.”

Picklist Display Name: Issue Sub-Category

Picklist Name: PickList SR Hierarchical Sub-Area

(note: All values from Picklist SR Hierarchical Sub-Area have “None” as a sub-category)

Sub-Category of: Balance Dispute

Values:

Disputes Late Charges	Interest Accrual	Payments Posted Incorrectly
Incorrect	Payments Not Posted	Payments Refused

Sub-Category of: Bankruptcy

Values:

Cus Belve Lns Discharged
Ln Hldr Cntct Cus Dur Bnrkrptcy

Sub-Category of: Closed School

Values:

Discharge Never Processed
Wants Discharge

Sub-Category of: Collection Practices

Values:

Agency Calling At All Hours	Cus Wnts CA To Stop Call	Fees Too High
CA Will Not Work With	Wrk	Wants Fees Removed
Customer	Disputes Fees	

Sub-Category of: Consolidation

Values:

Balance Incorrect	Wants To Add Loans
Not All Loans Included	Wants To Consolidate

Sub-Category of: Credit Report

Values:

Ln Shws Deflt On Credit Rpt

Sub-Category of: Default

Values:

Customer was in School
Default In Error

Sub-Category of: Deferment

Values:

Economic Hardship	Mil Or Pub Health Services	Teacher Shortage Area
Graduate Fellowship	Mother Entering Workforce	Temporary/Total Disability
In-School Full-time	NOAA	Unemployment
In-School Half-time	Parental Leave	
Internship/Residency	Rehabilitation Training	

Sub-Category of: Forbearance

Values:

Disaster Area	Hardship
Emergency Mobilization	Internship/Residency

Sub-Category of: Loan Cancellation

Values:

Child or Family Service Agency	Military Service	Teach Ser-Special ED
Early Intervention	Peace Corps/Action	Teacher Service-Low Income
Health Care	Volunteers	
Law Enforcement	Teach Ser-Handicapped Stu	
	Teach Ser-Shortage Area	

Sub-Category of: Loan Discharge

Values:

Bankruptcy	Death	False Signature
Closed School	Disability	

Sub-Category of: NSLDS

Values:

Default record incorrect	Loan Paid In Full	Incorrect Loan on Record
--------------------------	-------------------	--------------------------

Sub-Category of: Pell Grant

Values:

School Withholding Funds

Sub-Category of: Quality of Education

Values:

Cus D/N Get Job Trained For
School D/N Offer Classes Adver

Sub-Category of: Repayment Plans/Amounts

Values:

Payments Too High
Srvcr Won't Alter Pmt Amt

Sub-Category of: School Refund

Values:

Never Credited To Loan	Never Received	Not Enough Refunded
------------------------	----------------	---------------------

Sub-Category of: Service Quality

Values:

Error Correction Too Slow	Notices/Bills Lt/Nvr	Poor Explanation of Options
Incomplete Service	Received	Representative Rude

Sub-Category of: Social Security Number

Values:

Duplicate
Incorrect on Loan

Sub-Category of: Tax Refund Offset

Values:

Not Applied
Wants Returned

Appendix B3: Accounts Picklists

Picklist Display Name: Suffix

Picklist Name: OCTS Suffix Picklist

Values:

II
III
IV
Jr.
Sr.

Picklist Display Name: Account Type

Picklist Name: PickList Account Type

Values:

Customer
Partner
Test

Picklist Display Name: Contact Method

Picklist Name: OCTS Contact Method Picklist

Values:

1st E-mail	Fax	None
2nd E-mail	Home Phone	Work Phone
Business Phone	Mail	
E-Mail	Mobile Phone	

Picklist Display Name: State

Picklist Name: PickList State

Values added to Vanilla:

AE
AP
CM
TT
VI

Picklist Display Name: Country

Picklist Name: PickList Country

Values added to Vanilla:

Czech Republic

Appendix B4: Contacts Picklists

Picklist Display Name: Suffix

Picklist Name: OCTS Suffix Picklist

Values:

II
III
IV
Jr.
Sr.

Picklist Display Name: Contact Type

Picklist Name: OCTS Contact Type Picklist

Values:

Customer
Partner
Third Party
Test

Picklist Display Name: Relationship/Title

Picklist Name: OCTS Relationship to Case/Issue

Values:

Borrower	Co-signer/Co-maker	Secondary Ombudsman
Borrower's Spouse	Primary Ombudsman	Contact
Borrower's Parent/Guardian	Contact	Special Case Contact

Picklist Display Name: Contact Method

Picklist Name: OCTS Contact Method Picklist

Values:

1st E-mail	Fax	None
2nd E-mail	Home Phone	Work Phone
Business Phone	Mail	
E-Mail	Mobile Phone	

Picklist Display Name: State

Picklist Name: PickList State

Values added to Vanilla:

AE
AP
CM
TT
VI

Picklist Display Name: Country

Picklist Name: PickList Country

Values added to Vanilla:

Czech Republic

Appendix B5: Activities Picklists

Picklist Display Name: Activity Type

Picklist Name: PickList Action Type

Values Added for OCTS 2.0:

Internet

Referral

Values Made Inactive for OCTS 2.0:

Administration

Assessment

Call

Contact Behavior

Depot Repair

Diagnosis

Email

Field Repair

In Store Activity

In Store Visit

Installation

Milestone

Notes

Presentation

Preventive Maintenance

Stock Transfer

Store Check

Tactic

Technical Support Follow-

Up

Upgrade

Web Update

Acknowledged

Declined

Picklist Display Name: Status

Picklist Name: PickList Action Status

Values Made Inactive for OCTS 2.0:

Appendix C - VB Code

Appendix C1: Issues VB Code

```
Sub BusComp_SetFieldValue (FieldName As String)
if FieldName = "Status" then

    if GetFieldValue(FieldName) = "Closed" then
        SetFieldValue "Sub-Status", "Resolved"
    end if

end if

End Sub
```


Appendix C3: Activities VB Code

```
Sub BusComp_SetFieldValue (FieldName As String)
```

```
    Dim X as Integer  
    Dim weekend as Integer  
    Dim Workingdays as Integer
```

```
    Dim vdate1, vdate2, Vdiff, Vtime1, Vtime2 as double
```

```
    If FieldName = "Done" Then  
        y = getfieldvalue("Started")  
        If isdate(y) then  
            Sdate1 = GetFieldValue("Started")  
            Sdate2 = GetFieldValue("Done")  
            VDate1 = DateValue(Sdate1)  
            Vtime1 = TimeValue(Sdate1)  
            VDate2 = DateValue(Sdate2)  
            Vtime2 = TimeValue(Sdate2)  
            vdate1 = vdate1 + vtime1  
            vdate2 = vdate2 + vtime2  
            Vdiff = (Vdate2 - Vdate1) * (60*24)  
            Setfieldvalue "Duration Minutes",str(vdiff)  
        End if  
    End if
```

```
    If FieldName = "Started" Then  
        y = getfieldvalue("Done")  
        If isdate(y) then  
            Sdate1 = GetFieldValue("Started")  
            Sdate2 = GetFieldValue("Done")  
            VDate1 = DateValue(Sdate1)  
            Vtime1 = TimeValue(Sdate1)  
            VDate2 = DateValue(Sdate2)  
            Vtime2 = TimeValue(Sdate2)  
            vdate1 = vdate1 + vtime1  
            vdate2 = vdate2 + vtime2  
            Vdiff = (Vdate2 - Vdate1) * (60*24)  
            Setfieldvalue "Duration Minutes",str(vdiff)  
        End if  
    End if  
End Sub
```

Appendix C4: Script VB Code

Script Level Code: Following is VB Code appearing at the script level. Listed is the name of the script, the function and the actual VB code.

1. Master Question Script – Script Open

Sub Script_Open

‘CODE USED TO BRING APPLICATION PICKLIST INTO SMARTSCRIPT QUESTIONS

```
Dim SRPage as SmartScriptPage
Dim SRQuestion as SmartScriptQuestion
Dim SRBC as BusComp
Dim ContactQuestion as SmartScriptQuestion
Dim ContactBC as BusComp
```

```
SetUserParameter "uprmGoToAddCont", "N"
```

```
Set SRPage = GetPage("Master Page")
Set SRQuestion = SRPage.GetQuestion("Case Main Category")
Set SRBC = SRQuestion.GetSaveBusComp
```

```
Set ContactQuestion = SRPage.GetQuestion("Cntc State")
Set ContactBC = ContactQuestion.GetSaveBusComp
```

With SRBC

```
.ActivateField "Version"
.ActivateField "Source"
.ActivateField "Severity"
.ActivateField "Customer Category"
.ActivateField "Resolution Code"
```

```
.NewRecord NewBefore
```

End With

With ContactBC

```
.ActivateField "Contact State"
.ActivateField "Contact Country"
.ActivateField "M/M"
```

.ActivateField "Assistant"
.ActivateField "Time Zone"
.ActivateField "Suffix"
.NewRecord NewBefore

End with
End Sub

2. Master Question Script – Script Pre-Finish

Function Script_PreFinish () As Integer

' CODE USED TO POPULATE DATA ACROSS THE ACCOUNT, CONTACT AND SR BUSCOMP

Dim Page as SmartScriptPage
Dim ContactQuestion as SmartScriptQuestion
Dim ServiceRequestBC as BusComp
Dim AccountBO as BusObject
Dim ContactBC as BusComp
Dim AccountBC as BusComp
Dim prodBCPick as BusComp
Dim accBCPick as BusComp

Dim ContactExists as Integer
Dim ContactId as String
Dim SRId as String
Dim Test as String
Dim AccountId as String

'SHARED FIELDS

Dim FirstName as String
Dim LastName as String
Dim Account as String

'UNIQUE ACCOUNT FIELDS

Dim Relationship as String
Dim ContactMethod as String
Dim StreetAddress as String
Dim City as String
Dim State as String
Dim PostalCode as String
Dim Country as String
Dim Location as String
Dim BirthDate as String
Dim AssignmentCountryCode as String
Dim MainPhoneNumber as String
Dim WorkPhoneNumber as String
Dim MobilePhoneNumber as String

Dim MainFaxNumber as String
Dim Homepage as String
Dim Description as String
Dim PreferredName as String

'UNIQUE CONTACT FIELDS

Dim ContactType as String
Dim JobTitle as String
Dim Suffix as String
Dim MiddleName as String
Dim Preferred as String
Dim Prefix as String
Dim Address as String
Dim ContactCity as String
Dim ContactState as String
Dim ZipCode as String
Dim ContactCountry as String
Dim Assistant as String
Dim HomePhone as String
Dim WorkPhone as String
Dim CellularPhone as String
Dim FaxPhone as String
Dim CountryCode as String
Dim EmailAddress as String
Dim SecondaryEmail as String
Dim HrsAvail as String
Dim TimeZone as String
Dim Comment as String

'UNIQUE SR FIELDS

Dim OriginalIssueSummary as String
Dim Version as String
Dim Severity as String
Dim Source as String
Dim Abstract as String
Dim CustomerCategory as String
Dim ResolutionCode as String
Dim ContactBusinessPhone as String
Dim Product as String
Dim LoanStatus as String
Dim ServicingAgency as String

Dim ReturnData as Integer

Set Page = GetPage("Master Page")
Set AccountBO = TheApplication.GetBusObject("Account")
Set AccountBC = AccountBO.GetBusComp ("Account")

Set ContactBC = AccountBO.GetBusComp("Contact")
Set ServiceRequestBC = AccountBO.GetBusComp("Service Request")

'CONTACT VALUES

Account = Page.GetQuestion("Cntc SSN").GetCurrentValue
FirstName = Page.GetQuestion("Cntc First Name").GetCurrentValue
LastName = Page.GetQuestion("Cntc Last Name").GetCurrentValue
Suffix = Page.GetQuestion("Cntc Name Suffix").GetCurrentValue
Prefix = Page.GetQuestion("Cntc Name Prefix").GetCurrentValue
MiddleName = Page.GetQuestion("Cntc Middle Name").GetCurrentValue
Preferred = Page.GetQuestion("Cntc Name Preferred").GetCurrentValue
Address = Page.GetQuestion("Cntc Street").GetCurrentValue
ContactCity = Page.GetQuestion("Cntc City").GetCurrentValue
ContactState = Page.GetQuestion("Cntc State").GetCurrentValue
ZipCode = Page.GetQuestion("Cntc Zip").GetCurrentValue
ContactCountry = Page.GetQuestion("Cntc Country").GetCurrentValue
Assistant = Page.GetQuestion("Cntc Method").GetCurrentValue
HomePhone = Page.GetQuestion("Cntc Home Phone").GetCurrentValue
WorkPhone = Page.GetQuestion("Cntc Work Phone").GetCurrentValue
CellularPhone = Page.GetQuestion("Cntc Mobile Phone").GetCurrentValue
FaxPhone = Page.GetQuestion("Cntc Fax").GetCurrentValue
CountryCode = Page.GetQuestion("Cntc Country Code").GetCurrentValue
EmailAddress = Page.GetQuestion("Cntc Email1").GetCurrentValue
SecondaryEmail = Page.GetQuestion("Cntc Email2").GetCurrentValue
HrsAvail = Page.GetQuestion("Cntc Availability").GetCurrentValue
TimeZone = Page.GetQuestion("Cntc Time Zone").GetCurrentValue

'ACCOUNT VALUES

BirthDate = Page.GetQuestion("Acct Birthdate").GetCurrentValue

'SERVICE REQUEST VALUES

OriginalIssueSummary = Page.GetQuestion("Case Summary").GetCurrentValue
Version = Page.GetQuestion("Case Main Category").GetCurrentValue
Severity = Page.GetQuestion("Case Sub Category").GetCurrentValue
Source = Page.GetQuestion("Case Referred by").GetCurrentValue
Abstract = Page.GetQuestion("Case Exp Summary").GetCurrentValue
CustomerCategory = Page.GetQuestion("Case Exp Category").GetCurrentValue
ResolutionCode = Page.GetQuestion("Case Exp Sub Category").GetCurrentValue

Set Page = GetPage("Loan Questions")
Set AccountBO = TheApplication.GetBusObject("Account")
Set AccountBC = AccountBO.GetBusComp("Account")
Set ContactBC = AccountBO.GetBusComp("Contact")
Set ServiceRequestBC = AccountBO.GetBusComp("Service Request")

Product = Page.GetQuestion("Loan Type").GetCurrentValue
ServicingAgency = Page.GetQuestion("Loan Servicer").GetCurrentValue

LoanStatus = Page.GetQuestion("Loan Status").GetCurrentValue

If LastName <> "" and Account <> "" Then

With ContactBC

.SetViewMode AllView
.ActivateField("Last Name")
.ActivateField("Account")
.ActivateField(" Account Id")
.ClearToQuery
.SetSearchSpec "Last Name", LastName
.ExecuteQuery ForwardBackward

If .FirstRecord Then

SetUserParameter "ContactExists", "Y"
ContactId=.GetFieldValue("Id")
SetUserParameter "ContactId", ContactId

else

With AccountBC

.NewRecord NewAfter
.SetFieldValue "Name",Account
.SetFieldValue "Location",Location
.SetFieldValue "Last Name",LastName
.SetFieldValue "First Name",FirstName
.SetFieldValue "Middle Name",MiddleName
.SetFieldValue "Birth Date",BirthDate
.SetFieldValue "Home Page",EmailAddress
.SetGFieldValue "SecondaryEmail",SecondaryEmail
.SetFieldValue "Street Address",Address
.SetFieldValue "City",ContactCity
.SetFieldValue "State",ContactState
.SetFieldValue "Postal Code",ZipCode
.SetFieldValue "Country",ContactCountry
.SetFieldValue "Main Phone Number",HomePhone
.SetFieldValue "Work Phone Number",WorkPhone
.SetFieldValue "Mobile Phone Number",CellularPhone
.SetFieldValue "Main Fax Number",FaxPhone
.SetFieldValue "Assignment Country Code",CountryCode
.SetFieldValue "Hrs Avail",HrsAvail
.SetFieldValue "Time Zone",TimeZone
.SetFieldValue "Contact Method",Assistant
.SetFieldValue "Type", "Customer"
.SetFieldValue "M/M",Prefix
.SetFieldValue "Suffix",Suffix
.SetFieldValue "Preferred Name",Preferred

```

        .WriteRecord

        AccountId = .GetFieldValue ("Id")

    End With

With ContactBC
    .NewRecord NewAfter

    'Hardcode "Customer" as Contact Type
    .SetFieldValue "Contact Type","Customer"
    'Hardcode "Borrower" as Job Title
    .SetFieldValue "Job Title","Borrower"

    .SetFieldValue "Last Name",LastName
    .SetFieldValue "Suffix",Suffix
    .SetFieldValue "First Name",FirstName
    .SetFieldValue "Middle Name",MiddleName
    .SetFieldValue "Address",Address
    .SetFieldValue "Contact City",ContactCity
    .SetFieldValue "Contact State",ContactState
    .SetFieldValue "Zip Code",ZipCode
    .SetFieldValue "Contact Country",ContactCountry
    .SetFieldValue "Assistant",Assistant
    .SetFieldValue "Home Phone #",HomePhone
    .SetFieldValue "Work Phone #",WorkPhone
    .SetFieldValue "Cellular Phone #",CellularPhone
    .SetFieldValue "Fax Phone #",FaxPhone
    .SetFieldValue "Country Code",CountryCode
    .SetFieldValue "Email Address",EmailAddress
    .SetFieldValue "Secondary Email",SecondaryEmail
    .SetFieldValue "Hrs Avail",HrsAvail
    .SetFieldValue "Time Zone",TimeZone
    .SetFieldValue "Alias",Preferred
    .SetFieldValue "M/M",Prefix

    .WriteRecord
    AccountId = .GetFieldValue("Account Id")
    ContactId = .GetFieldValue ("Id")
End With

With ServiceRequestBC
    .ActivateField("Original Issue Summary")
    .ActivateField("Version")
    .ActivateField("Severity")
    .ActivateField("Source ")

```

```

.ActivateField("Abstract")
.ActivateField("Customer Category")
.ActivateField("Resolution Code")
.ActivateField("Account")
.ActivateField("Id")
.ActivateField("Product")
.ActivateField("ServicingAgency")
.ActivateField("LoanStatus")

.NewRecord NewAfter
.SetFieldValue "Contact Id", ContactId
.SetFieldValue "Original Issue Summary",OriginalIssueSummary
.SetFieldValue "Version", Version
.SetFieldValue "Severity",Severity
.SetFieldValue "Source",Source
.SetFieldValue "Abstract",Abstract
.SetFieldValue "Customer Category", CustomerCategory
.SetFieldValue "Contact Last Name", LastName
.SetFieldValue "Resolution Code", ResolutionCode

.SetFieldValue "Contact Business Phone", HomePhone

Set accBCPick = .GetPicklistBusComp("Account")
    With accBCPick
        .ClearToQuery
        .ActivateField "Name"
        .SetSearchSpec "Name", Account
        .ExecuteQuery
        If .FirstRecord then
            .Pick
        End If
    End with
Set accBCPick = Nothing

Set prodBCPick = .GetPicklistBusComp("Product")
    With prodBCPick
        .ClearToQuery
        .ActivateField "Name"
        .SetSearchSpec "Name", Product
        .ExecuteQuery
        If .FirstRecord then
            .Pick
        End If
    End with
Set prodBCPick = Nothing

.SetFieldValue "Servicing Agency", ServicingAgency

```

```

        .SetFieldValue "Loan Status", LoanStatus

        .WriteRecord
        SRId = .GetFieldValue("Id")
    End With

    TheApplication.SetSharedGlobal "uparSRId", SRId
    TheApplication.SetSharedGlobal "globAcctNm", Account
    SetUserParameter "ContactExists", "N"
    SetUserParameter "ContactId", ContactId
    SetUserParameter "AccountId", AccountId

End If
End With
End If
    Script_PreFinish = ContinueOperation

```

End Function

3. Master Question Script – Script Finish

```

Sub Script_Finish
'CODE USED TO DELETE EXTRA RECORD CREATED AT SCRIPT OPEN
Dim SRPage as SmartScriptPage
Dim SRQuestion as SmartScriptQuestion
Dim SRBC as BusComp
Dim ContactPage as SmartScriptPage
Dim ContactQuestion as SmartScriptQuestion
Dim ContactBC as BusComp

Set SRPage = GetPage ("Master Page")
Set SRQuestion = SRPage.GetQuestion("Case Main Category")
Set SRBC = SRQuestion.GetSaveBusComp

Set ContactQuestion = SRPage.GetQuestion("Cntc State")
Set ContactBC = ContactQuestion.GetSaveBusComp

    With SRBC
        .ActivateField "Id"
        .ActivateField "SR Number"
        .DeleteRecord
    End With

    With ContactBC
        .ActivateField "Id"
        .ActivateField "SR Number"
        .ActivateField "ContactId"
    End With

```

```
.DeleteRecord  
End With
```

```
If GetParameter("User.uprmGoToAddCont") = "Y" Then  
TheApplication.InvokeMethod "RunSmartScript", "Add a Contact", "", "ENU", "USD"  
End If
```

```
End Sub
```

4. *New Service Request – Script Open*

```
Sub Script_Open
```

'CODE USED TO BRING APPLICATION PICKLIST INTO SMARTSCRIPT QUESTIONS

```
Dim SRPage as SmartScriptPage  
Dim SRQuestion as SmartScriptQuestion  
Dim SRBC as BusComp  
Dim SRId as String  
Dim SRNumber as String  
Dim SRExists as Integer
```

```
'Create New Service Request  
Set SRPage = GetPage ("SR Greeting")  
Set SRQuestion = SRPage.GetQuestion("SR Borrower?")  
Set SRBC = SRQuestion.GetSaveBusComp
```

```
With SRBC
```

```
.ActivateField "Id"  
.ActivateField "Abstract"  
.ActivateField "ContactLastName"  
.ActivateField "ContactFirstName"  
.ActivateField "Contact Id"  
.ActivateField "Serial Number"  
.ActivateField "Profile Product Name"  
.ActivateField "Product Name"  
.ActivateField "SR Number"  
.ActivateField "Area"  
.ActivateField "Version"  
.ActivateField "Commit Time"  
.ActivateField "Created By Name"  
.ActivateField "Customer Ref Number"  
.NewRecord NewBefore
```

```
End With
```

```
SRId = SRBC.GetFieldValue("Id")
```

```
SRNumber = SRBC.GetFieldValue("SR Number")
SetUserParameter "SRNumber", SRNumber
SRBC.SetFieldValue "Customer Ref Number", ""
```

End Sub

5. Add a Contact – Script Open

'CODE USED TO BRING APPLICATION PICKLIST INTO SMARTSCRIPT QUESTIONS

Sub Script_Open

```
Dim SRPage as SmartScriptPage
Dim SRQuestion as SmartScriptQuestion
Dim SRBC as BusComp
```

```
Set SRPage = GetPage("SR Add a Contact")
Set SRQuestion = SRPage.GetQuestion("SR Add a Contact")
Set SRBC = SRQuestion.GetSaveBusComp
```

With SRBC

```
.ActivateField "Id"
.ActivateField "Contact Id"
.ActivateField "Contact Last Name"
.ActivateField "SR Number"
```

```
.NewRecord NewBefore
```

End With

End Sub

6. Add a Contact – Script Pre-Finish

'CODE USED TO DELETE EXTRA RECORD CREATED AT SCRIPT OPEN

Function Script_PreFinish () As Integer

```
Dim SRPage as SmartScriptPage
Dim SRQuestion as SmartScriptQuestion
Dim SRBC as BusComp
```

```
Set SRPage = GetPage("SR Add a Contact")
Set SRQuestion = SRPage.GetQuestion("SR Add a Contact")
Set SRBC = SRQuestion.GetSaveBusComp
```

With SRBC

```
.ActivateField("Id")
.ActivateField("Contact Id")
SetUserParameter "uparNewContId", .GetFieldValue("Contact Id")
.DeleteRecord
```

End With

```
Script_PreFinish = ContinueOperation
```

End Function

7. Add a Contact - Script Finish

Sub Script_Finish

'CODE USED TO SET USER PARAMETER ID (uparSRId) TO LINK SR'S WITH CORRECT CONTACT

```
Dim ServiceRequestBO as BusObject
```

```
Dim ServiceRequestBC as BusComp
```

```
Set ServiceRequestBO = TheApplication.GetBusObject("Service Request")
```

```
Set ServiceRequestBC = ServiceRequestBO.GetBusComp("Service Request")
```

With ServiceRequestBC

```
.SetViewMode AllView
```

```
.ActivateField("Id")
```

```
.ActivateField("Contact Id")
```

```
.ClearToQuery
```

```
.SetSearchSpec "Id", TheApplication.GetSharedGlobal("uparSRId")
```

```
.ExecuteQuery
```

```
If .FirstRecord then
```

```
.SetFieldValue "Contact Id", GetParameter("User.uparNewContId")
```

```
End If
```

```
.WriteRecord
```

End With

End Sub

Question Level Code: Following is VB Code appearing at the question level. Listed is the name of the question, the function and the actual VB code.

1. Case Main Category

‘CODE USE TO SET USER PARAMETER – BRINGS THE ANSWER TO THIS QUESTION INTO ‘ANOTHER QUESTION LATER IN THE SCRIPT.

Function Question_PreLeave () As Integer

Dim SRQuestion as SmartScriptQuestion
Dim SRBC as BusComp
Dim SRArea as String

Set SRQuestion = Page.GetQuestion("Case Main Category")
Set SRBC = SRQuestion.GetSaveBusComp

SRBC.ActivateField "Version"
SRArea = SRBC.GetFieldValue("Version")

Script.SetUserParameter "AreaName", SRArea

Question_PreLeave = ContinueOperation
End Function

2. *Goodbye Q4*

Sub Question_Leave

‘CODE USED TO CONNECT SCRIPTS TOGETHER

Script.Finish

TheApplication.InvokeMethod "RunSmartScript", "Goodbye Script", "", "ENU", "USD"

End Sub

3. *Goodbye Q5*

‘CODE USED TO SET USER PARAMETER – CONNECTS TO “ADD A CONTACT” SCRIPT

Sub Question_Leave

Script.SetUserParameter "uprmGoToAddCont", "Y"

End Sub

4. *Loan Link*

Sub Question_Leave

'CODE USED TO CONNECT SCRIPT TOGETHER

```
Script.Finish  
TheApplication.InvokeMethod "RunSmartScript", "Loan Script", "", "ENU", "USD"  
End Sub
```

5. Master Greeting

Sub Question_Enter

```
Dim LoginId as String  
Dim EmployeeBO as BusObject  
Dim EmployeeBC as BusComp  
Dim FullName as String  
Dim QuestionText as String
```

'CREATES DYNAMIC QUESTION FOR TIME OF DAY AND AGENT NAME

```
QuestionText = GetQuestionText
```

' Dynamically Substitute Time of Day

```
If Hour(Time) < 12 then  
    QuestionText=SubstituteText(QuestionText,"Time of Day","morning")  
elseif Hour(Time) < 18 then  
    QuestionText=SubstituteText(QuestionText,"Time of Day","afternoon")  
else  
    QuestionText=SubstituteText(QuestionText,"Time of Day","evening")  
end if
```

' Dynamically Substitute Agent Name

```
LoginID = TheApplication.LoginId  
Set EmployeeBO = TheApplication.GetBusObject("Employee")  
Set EmployeeBC = EmployeeBO.GetBusComp("Employee")  
  
EmployeeBC.ActivateField "Id"  
EmployeeBC.ActivateField "Full Name"  
EmployeeBC.SetSearchSpec "Id", LoginId  
EmployeeBC.ExecuteQuery ForwardOnly  
FullName = EmployeeBC.GetFieldValue("Full Name")  
  
QuestionText=SubstituteText(QuestionText,"Agent Name",FullName)
```

'Update Question with Dynamic Substitutions

```
SetQuestionText(QuestionText)
```

End Sub

6. *SR Add a Contact 1*

'DYNAMICALLY INSERT SSN INTO ANOTHER SMARTSCRIPT QUESTION

Sub Question_Enter

Dim Text as String

Dim SSN as String

Text = OriginalQuestionText

SSN = TheApplication.GetSharedGlobal("globAcctNm")

Text = SubstituteText (Text, "SSN", SSN)

SetQuestionText(Text)

End Sub

7. *SR Area Of Problem*

'DYNAMICALLY INSERT ISSUE CATEGORY INTO ANOTHER SMARTSCRIPT QUESTION

Function Question_PreLeave () As Integer

Dim SRQuestion as SmartScriptQuestion

Dim SRBC as BusComp

Dim SRArea as String

Set SRQuestion = Page.GetQuestion("SR Area Of Problem")

Set SRBC = SRQuestion.GetSaveBusComp

SRBC.ActivateField "Version"

SRArea = SRBC.GetFieldValue("Version")

Script.SetUserParameter "AreaName", SRArea

Question_PreLeave = ContinueOperation

End Function

8. *SR Borrower?*

Sub Question_Enter

Dim LoginId as String

Dim EmployeeBO as BusObject

Dim EmployeeBC as BusComp

Dim FullName as String
Dim QuestionText as String

'CREATES DYNAMIC QUESTION FOR TIME OF DAY AND AGENT NAME

QuestionText = GetQuestionText

' Dynamically Substitute Time of Day

If Hour(Time) < 12 then
 QuestionText=SubstituteText(QuestionText,"Time of Day","morning")
elseif Hour(Time) < 18 then
 QuestionText=SubstituteText(QuestionText,"Time of Day","afternoon")
else
 QuestionText=SubstituteText(QuestionText,"Time of Day","evening")
end if

' Dynamically Substitute Agent Name

LoginID = TheApplication.LoginId
Set EmployeeBO = TheApplication.GetBusObject("Employee")
Set EmployeeBC = EmployeeBO.GetBusComp("Employee")

EmployeeBC.ActivateField "Id"
EmployeeBC.ActivateField "Full Name"
EmployeeBC.SetSearchSpec "Id", LoginId
EmployeeBC.ExecuteQuery ForwardOnly
FullName = EmployeeBC.GetFieldValue("Full Name")

QuestionText=SubstituteText(QuestionText,"Agent Name",FullName)

'Update Question with Dynamic Substitutions

SetQuestionText(QuestionText)

End Sub

9. SR Decision Issue

'CONNECT ORIGINAL ISSUE CATEGORY TO ASSOCIATED ENCYCLOPEDIA ENTRY

Sub Question_Enter

Dim Exists as String
Dim BeginQ as String
Dim Area as String
Dim Text as String

```
Dim ExistText as String
Dim Explanation as String
Dim DecIssueBO as BusObject
Dim DecIssueBC as BusComp
```

```
Exists = Script.GetParameter ("User.IssueFound")
```

'Populate Question Text Based on Existence of Decision Issue

```
If Exists = "N" then
    BeginQ = Script.GetParameter ("User.FirstName") + ", "
    ExistText = "You are the first to report this problem. "
    Explanation = "I'm going to have to turn your issue over to an Ombudsman Specialist."

    SetCurrentValue = N
else
    BeginQ = "EXPLANATION OF ISSUE: "
    ExistText = ""
    SetCurrentValue = Y
```

'Get Area Name

```
Area = Script.GetParameter ("User.AreaName")
```

'Get Decision Issue that matches Area Name

```
Set DecIssueBO = TheApplication.GetBusObject ("Decision Issue")
Set DecIssueBC = DecIssueBO.GetBusComp ("Decision Issue")
```

```
With DecIssueBC
    .SetViewMode 3
    .ActivateField "Name"
    .ActivateField "Explanation"
    .ActivateField "Discussion"
    .ClearToQuery
    .SetSearchSpec "Name", Area
    .ExecuteQuery ForwardOnly
```

```
End With
```

```
Explanation = DecIssueBC.GetFieldValue ("Explanation")
```

```
end if
```

```
Text = OriginalQuestionText
Text = SubstituteText (Text, "BeginQ", BeginQ)
Text = SubstituteText (Text, "ExistText", ExistText)
```

Text = SubstituteText(Text,"Explanation",Explanation)

'Update Question with Dynamic Substitutions

SetQuestionText(Text)

End Sub

10. SR Decision Issue How to Discuss

'DYNAMICALLY SUBSTITUTE TEXT WITHIN ENCYCLOPEDIA DISCUSSION QUESTIONS

Sub Question_Enter

Dim Discuss as String

Dim Area as String

Dim Text as String

Dim ExistText as String

Dim Explanation as String

Dim DecIssueBO as BusObject

Dim DecIssueBC as BusComp

ExistText = "HOW TO DISCUSS: "

'Get Area Name

Area = Script.GetParameter ("User.AreaName")

'Get Contact First Name

Set DecIssueBO = TheApplication.GetBusObject ("Decision Issue")

Set DecIssueBC = DecIssueBO.GetBusComp ("Decision Issue")

With DecIssueBC

.SetViewMode 3

.ActivateField "Name"

.ActivateField "Explanation"

.ActivateField "Discussion"

.ClearToQuery

.SetSearchSpec "Name", Area

.ExecuteQuery ForwardOnly

End With

Discuss = DecIssueBC.GetFieldValue ("Discussion")

```
Text = OriginalQuestionText
Text = SubstituteText (Text, "ExistText", ExistText)
Text = SubstituteText(Text,"Discuss",Discuss)
```

'Update Question with Dynamic Substitutions

```
SetQuestionText(Text)
```

End Sub

11. SR Last Name

'CODE USED TO SET USER PARAMETER ID TO LINK SR'S WITH CORRECT CONTACT 'ACCOUNT INFORMATION.

Sub Question_PreLeave

```
Dim SRQuestion as SmartScriptQuestion
Dim SRContactAcct as String
Dim SRBC as BusComp
Dim SRContactLN as String
Dim SRContactId as String
```

```
Set SRQuestion = Page.GetQuestion("SR Last Name")
Set SRBC = SRQuestion.GetSaveBusComp
```

```
SRBC.ActivateField "ContactLastName"
SRBC.ActivateField "Account"
SRBC.ActivateField "Contact Id"
SRContactLN = SRBC.GetFieldValue("Contact Last Name")
SRContactAcct = SRBC.GetFieldValue("Account")
SRContactId = SRBC.GetFieldValue ("Contact Id")
```

```
Script.SetUserParameter "LastName", SRContactLN
Script.SetUserParameter "Account", SRAccount
Script.SetUserParameter "SRContactId", SRContactId
```

End Sub

12. SR Last Name-NC

'CODE USED TO SET USER PARAMETER ID TO LINK SR'S WITH CORRECT CONTACT 'ACCOUNT INFORMATION.

```

Function Question_PreLeave () As Integer

Dim SRQuestion as SmartScriptQuestion
Dim SRContactAcct as String
Dim SRBC as BusComp
Dim SRContactLN as String
Dim SRContactId as String

Set SRQuestion = Page.GetQuestion("SR Last Name-NC")
Set SRBC = SRQuestion.GetSaveBusComp

SRBC.ActivateField "ContactLastName"
SRBC.ActivateField "Account"
SRBC.ActivateField "Contact Id"
SRContactLN = SRBC.GetFieldValue("Contact Last Name")
SRContactAcct = SRBC.GetFieldValue("Account")
SRContactId = SRBC.GetFieldValue ("Contact Id")

Script.SetUserParameter "LastName", SRContactLN
Script.SetUserParameter "Account", SRAccount
Script.SetUserParameter "SRContactId", SRContactId

Question_PreLeave = ContinueOperation
End Function

```

13. SR Resolution of Problem

'SET YES OR NO PARAMETERS DEPENDING ON WHETHER ISSUE EXISTS WITHIN ENCYCLOPEDIA

```

Sub Question_Enter

Dim Page1 as SmartScriptPage
Dim Area as String
Dim Text as String
Dim AreaQuestion as SmartScriptQuestion
Dim CurrentQuestion as SmartScriptQuestion

```

```
Dim DecIssueBO as BusObject
Dim DecIssueBC as BusComp
Dim Exists as String
```

' Populate Question with Correct Wording on if Decision Issue exists or not

```
Area = Script.GetParameter ("User.AreaName")
```

'Get Area Decision Issue

```
Set DecIssueBO = TheApplication.GetBusObject ("Decision Issue")
Set DecIssueBC = DecIssueBO.GetBusComp ("Decision Issue")
```

```
With DecIssueBC
    .SetViewMode 3
    .ActivateField "Name"
    .ActivateField "Description"
    .ClearToQuery
    .SetSearchSpec "Name", Area
    .ExecuteQuery ForwardOnly
    RecordFound = .FirstRecord
End With
```

'Decision Issue Found

```
If RecordFound then
    Exists = "Y"
else
    Exists = "N"
end if
```

```
Script.SetUserParameter "IssueFound", Exists
```

```
Text = OriginalQuestionText
Text = SubstituteText (Text, "Area", Area)
```

'Update Question with Dynamic Substitutions

```
SetQuestionText(Text)
```

```
End Sub
```

14. SR Verify First Name-3rd Party

'USED TO DYNAMICALLY CONFIRM CHOICE MADE WHEN CHOOSING AN EXISTING CONTACT

```
Sub Question_Enter  
Dim ContactLN as String  
Dim ContactId as String  
Dim Text as String  
Dim ContactBO as BusObject  
Dim ContactBC as BusComp  
Dim FirstName as String
```

' Populate Question with Contact Last Name

```
ContactLN = Script.GetParameter ("User.LastName")
```

' Get Contact Id from record obtained in earlier question

```
ContactId = Script.GetParameter ("User.SRContactId")
```

'Get Contact First Name

```
Set ContactBO = TheApplication.GetBusObject ("Contact")  
Set ContactBC = ContactBO.GetBusComp ("Contact")
```

```
With ContactBC  
    .SetViewMode 3  
    .ActivateField "Last Name"  
    .ActivateField "First Name"  
    .ActivateField "Id"  
    .ClearToQuery  
    .SetSearchSpec "Id", ContactId  
    .ExecuteQuery
```

```
End With
```

```
FirstName = ContactBC.GetFieldValue ("First Name")
```

```
Script.SetUserParameter "FirstName", FirstName
```

' Populate Text with First Name

```
Text = OriginalQuestionText  
Text = SubstituteText (Text, "Last Name", ContactLN)  
Text = SubstituteText(Text,"First Name",FirstName)
```

'Update Question with Dynamic Substitutions

SetQuestionText(Text)

End Sub

15. SR Verify First Name-Borrower

Sub Question_Enter

'USED TO DYNAMICALLY CONFIRM CHOICE MADE WHEN CHOOSING AN EXISTING CONTACT

Dim ContactLN as String

Dim ContactId as String

Dim Text as String

Dim ContactBO as BusObject

Dim ContactBC as BusComp

Dim FirstName as String

' Populate Question with Contact Last Name

ContactLN = Script.GetParameter ("User.LastName")

' Get Contact Id from record obtained in earlier question

ContactId = Script.GetParameter ("User.SRContactId")

' Get Contact First Name

Set ContactBO = TheApplication.GetBusObject ("Contact")

Set ContactBC = ContactBO.GetBusComp ("Contact")

With ContactBC

.SetViewMode 3

.ActivateField "Last Name"

.ActivateField "First Name"

.ActivateField "Id"

.ClearToQuery

.SetSearchSpec "Id", ContactId

.ExecuteQuery

End With

```
FirstName = ContactBC.GetFieldValue( "First Name")  
Script.SetUserParameter "FirstName", FirstName
```

' Populate Text with First Name

```
Text = OriginalQuestionText  
Text = SubstituteText (Text, "Last Name", ContactLN)  
Text = SubstituteText(Text,"First Name",FirstName)
```

'Update Question with Dynamic Substitutions

```
SetQuestionText(Text)
```

End Sub

Appendix C5 – Results VB Code

The following VB code is attached to the Solution SR/PD Business Component. This code was written in order to prevent user update of the category when a user is establishing a new relationship to an existing result. In order to do this, a global variable was established. During a NewRecord or a Copy user tries to change the category or subcategory fields, the code checks the global variable to determine whether or not to accept the change.

```
Function BusComp_PreSetFieldValue (FieldName As String, FieldValue As String) As Integer
```

```
'-----  
' Caroline Quintarelli 9/27/00  
' SR 130  
' Need a global variable that can be manipulated based on whether a user is adding  
' a new Solution or merely a new relationship between Solution and SR.  
' This allows me to issue errors when certain fields are inappropriately modified.  
'-----
```

```
    Dim iReturn as integer
```

```
    msgtext = " can not be updated unless a new result is being added."
```

```
    if iNewRecord = 0 then  
        if FieldName = "Category" or FieldName = "Sub Category" then  
            'msgtext = FieldName & msgtext  
            'msgbox msgtext  
            iReturn = CancelOperation  
        end if  
    else  
        iReturn = ContinueOperation  
    end if
```

```
    BusComp_PreSetFieldValue = iReturn
```

```
End Function
```

```
Sub BusComp_CopyRecord
```

```
'-----  
' Caroline Quintarelli 9/27/00  
' SIR 130
```

```
' Need a global variable that can be manipulated based on whether a user is adding  
' a new Solution or merely a new relationship between Solution and SR.  
' This allows me to issue errors when certain fields are inappropriately modified.  
' .....
```

```
iNewRecord = 1  
End Sub
```

```
Sub BusComp_NewRecord
```

```
' .....
```

```
' Caroline Quintarelli 9/27/00  
' SIR 130  
' Need a global variable that can be manipulated based on whether a user is adding  
' a new Solution or merely a new relationship between Solution and SR.  
' This allows me to issue errors when certain fields are inappropriately modified.  
' .....
```

```
iNewRecord = 1  
End Sub
```

```
Function BusComp_PreDeleteRecord () As Integer
```

```
' .....
```

```
' Caroline Quintarelli 9/27/00  
' SIR 130  
' Need a global variable that can be manipulated based on whether a user is adding  
' a new Solution or merely a new relationship between Solution and SR.  
' This allows me to issue errors when certain fields are inappropriately modified.  
' .....
```

```
iNewRecord = 0  
    BusComp_PreDeleteRecord = ContinueOperation  
End Function
```

```
Sub BusComp_WriteRecord
```

```

'-----
' Caroline Quintarelli 9/27/00
' SR 130
' Need a global variable that can be manipulated based on whether a user is adding
' a new Solution or merely a new relationship between Solution and SR.
' This allows me to issue errors when certain fields are inappropriately modified.

```

```

' Reset iNewRecord variable to 0 on commit.
'-----

```

```

iNewRecord = 0
End Sub

```

Appendix D – SmartScript Scenarios

Appendix D2: New Customer – New Case – 3rd Party

<u>Logical Field Name</u>	<u>Smartsript Question Name</u>	<u>Question Text</u>	<u>Pick Applet</u>	<u>Notes</u>	<u>Required Field?</u>
N/A	Master Greeting	* Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?	N/A		Y
N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
Original Issue Summary	Case Summary	* I'm glad you called. How may I help you today? [NOTE: Type caller's problem.]	N/A		Y

Version	Case Main Category	* [NOTE: Select Issue Category.]	SR Area Pick Applet		Y
Severity	Case Sub Category	* [NOTE: Select Issue Sub Category.]	SR Sub-Area Hierarchical Pick Applet		Y
Abstract	Case Exp Summary	[NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	N/A		N
Customer Category	Case Exp Category	[NOTE: Select Expectation Category.]	OCTS Contact Type Pick Applet		N
Resolution Code	Case Exp Sub Category	[NOTE: Select Expectation Sub Category.]	SR Sub-Area Hierarchical Pick Applet		N
Source	Case Referred by	How did you hear about our office?	SR Source Pick Applet		Y
N/A	KC Pilot - Contact Intro	OK, I think I have an understanding of your problem. I need to gather some information about yourself if that's alright. [Hit Enter to continue]	N/A		N
Account	Cntc SSN	* [NOTE: The following questions are about the borrower. If the caller is a third party, use his/her.] Now I need to gather some profile information about you. May I have your social security number?	N/A		Y
First Name	Cntc First Name	* May I have your first name?	N/A		Y
Last Name	Cntc Last Name	* May I have your last name?	N/A		Y

Suffix	Cntc Name Suffix	[NOTE: Select Jr., Sr., III, etc.]	OCTS Contact Type Pick Applet		N
Middle Name	Cntc Middle Name	What is your middle name or initial?	N/A		N
M/M	Cntc Name Prefix	[NOTE: Select name prefix.]	OCTS Contact Type Pick Applet		N
Alias	Cntc Name Preferred	Do you have a preferred name or nickname?	N/A		N
Birthdate	Acct Birthdate	May I have your birthdate? [NOTE: mm/dd/yyyy]	N/A		N
Address	Cntc Street	What is your street address?	N/A		N
Contact City	Cntc City	City?	N/A		N
Contact State	Cntc State	State?	OCTS Contact Type Pick Applet		N
Zip Code	Cntc Zip	Zipcode?	N/A		N
Contact Country	Cntc Country	[NOTE: Select country.]	OCTS Contact Type Pick Applet		N
Assistant	Cntc Method	* What is the best way for our office to contact you?	OCTS Contact Type Pick Applet		Y
Home Phone #	Cntc Home Phone	Home Phone?	N/A		N
Work Phone #	Cntc Work Phone	Work Phone?	N/A		N
Fax Phone #	Cntc Fax	Fax Number?	N/A		N
Cellular Phone #	Cntc Mobile Phone	Mobile Phone?	N/A		N
Country Code	Cntc Country Code	[NOTE: Enter country code.]	N/A		N
Email Address	Cntc Email1	Email address?	N/A		N

Secondary Email	Cntc Email2	Secondary email address?	N/A		N
Hrs Avail	Cntc Availability	What is the best time of day to contact you?	N/A		N
Time Zone	Cntc Time Zone	[NOTE: Select time zone. Confirm with caller.]	OCTS Contact Type Pick Applet		N
N/A	Loan Lead in	OK, I'd like to get a little more information on your loan please.	N/A		N
Product	Loan Type	* What type of loan do you have?	SR Internal Product Pick Applet		Y
Servicing Agency	Loan Servicer	* Who holds your loan?	OCTS Contact Type Pick Applet		Y
Loan Status	Loan Status	* What is the current status of your loan?	OCTS Contact Type Pick Applet		Y
N/A	SR Resolution of Problem	Hold for a moment while I search for further information on [Area] in the database.	N/A		N
N/A	SR Decision Issue	[ExistText][Explanation].	N/A		N
N/A	SR Decision Issue How to Discuss	[ExistText] [Discuss]	N/A		N
N/A	Goodbye Q0	[NOTE: Are you speaking with the borrower?]	N/A		Y
N/A	Goodbye Q5	[NOTE: Press Enter twice.]	N/A		N
N/A	SR TEST	[NOTE: Press Enter to continue.]	N/A		N
N/A	SR Add a Contact 1	NOTE: Press F2. Using the borrower's SSN, [SSN], add the third party contact information.	N/A		Y
N/A	Goodbye Q1	[NOTE: Can you resolve the issue now?]	N/A	If "NO", goto Goodbye Q3. If "YES", goto Goodbye Q2.	Y

N/A	Goodbye Q3	Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.]	N/A		N
N/A	Goodbye Q2	[NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]	N/A		N

Appendix D3: Existing Customer – Existing Case

<u>Applet Field Name</u>	<u>Logical Field Name</u>	<u>Smartsript Question Name</u>	<u>Question Text</u>	<u>Pick Applet</u>	Notes	<u>Required Field?</u>
N/A	N/A	Master Greeting	* Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?	N/A		Y
N/A	N/A	Master Existing Case?	Are you calling about an existing case?	N/A	Answer = YES	Y
N/A	N/A	Master Existing Yes	[NOTE: Press Enter twice to end the script. Use the OCTS 2.0 screens to find the case and log an activity.]	N/A		N

Appendix D4: Existing Customer – New Case - Borrower

<u>Applet Field Name</u>	<u>Logical Field Name</u>	<u>Smartsript Question Name</u>	<u>Question Text</u>	<u>Pick Applet</u>	<u>Notes</u>	<u>Required Field?</u>
N/A	N/A	Master Greeting	Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?	N/A		Y
N/A	N/A	Master Existing Case?	Are you calling about an existing case?	N/A	Answer = NO	Y
N/A	N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
N/A	N/A	Goodbye Q0	[NOTE: Are you speaking with the borrower?]	N/A	Answer = YES	Y
Case Last Name	Contact Last Name	SR Last Name	[NOTE: Press F2. Search for the account with the borrower's SSN.] May I have your social security number please?	SR Contact Pick Applet		Y
N/A	N/A	SR Verify First Name-Borrower	NOTE: You have selected [First Name] [Last Name] as the Borrower. If this is correct, press Enter. If this is incorrect, click on the question above and press F2 to reselect.	N/A		Y
N/A	N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
Original Issue Summary	Original Issue Summary	SR Profile Info	How may I help you today? [NOTE: Type caller's problem.]	N/A		Y
Original Issue Category	Version	SR Area Of Problem	[NOTE: Select Issue Category.]	SR Area Pick Applet		Y
Original Issue Sub-Category	Severity	SR Error Detail	[NOTE: Select Issue Sub Category.]	SR Sub-Area Hierarchical Pick Applet		Y
N/A	N/A	Loan Lead in	OK, I'd like to get a little more information on your loan please.	N/A		N

Loan Type	Product	Loan Type	* What type of loan do you have?	SR Internal Product Pick Applet		Y
Svc Agency	Servicing Agency	Loan Servicer	* Who holds your loan?	OCTS Contact Type Pick Applet		Y
Loan Status	Loan Status	Loan Status	* What is the current status of your loan?	OCTS Contact Type Pick Applet		Y
N/A	N/A	SR Resolution of Problem	Hold for a moment while I search for further information on [Area] in the database.	N/A		N
N/A	N/A	SR Decision Issue	[ExistText][Explanation].	N/A		N
N/A	N/A	SR Decision Issue How to Discuss	[ExistText] [Discuss]	N/A		N
N/A	N/A	Goodbye Q1	[NOTE: Can you resolve the issue now?]	N/A	If "NO", goto Goodbye Q3. If "YES", goto Goodbye Q2.	Y
N/A	N/A	Goodbye Q3	Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.]	N/A		N

N/A	N/A	Goodbye Q2	[NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]	N/A		N
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Appendix D5: Existing Customer – New Case – 3rd Party

<u>Applet Field Name</u>	<u>Logical Field Name</u>	<u>Smartsript Question Name</u>	<u>Question Text</u>	<u>Pick Applet</u>	<u>Notes</u>	<u>Required Field?</u>
N/A	N/A	Master Greeting	* Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?	N/A		Y
N/A	N/A	Master Existing Case?	Are you calling about an existing case?	N/A	Answer = NO	Y
N/A	N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
N/A	N/A	Goodbye Q0	[NOTE: Are you speaking with the borrower?]	N/A	Answer = NO	Y
Case Last Name	Contact Last Name	SR Last Name	[NOTE: Press F2. Search for the account with the borrower's SSN. Then, add the third party as a contact for the case] May I please have the borrower's social security number?	SR Contact Pick Applet		Y
N/A	N/A	SR Verify First Name-Borrower	NOTE: You have selected [First Name] [Last Name] as the Third Party Contact. If this is correct, press Enter. If this is incorrect, click on the question above and press F2 to reselect.	N/A		Y
N/A	N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
Original Issue Summary	Original Issue Summary	SR Profile Info	How may I help you today? [NOTE: Type caller's problem.]	N/A		Y
Original Issue Category	Version	SR Area Of Problem	[NOTE: Select Issue Category.]	SR Area Pick Applet		Y
Original Issue Sub-Category	Severity	SR Error Detail	[NOTE: Select Issue Sub Category.]	SR Sub-Area Hierarchical Pick Applet		Y

N/A	N/A	Loan Lead in	OK, I'd like to get a little more information on your loan please.	N/A		Y
Loan Type	Product	Loan Type	* What type of loan do you have?	SR Internal Product Pick Applet		Y
Svc Agency	Servicing Agency	Loan Servicer	* Who holds your loan?	OCTS Contact Type Pick Applet		Y
Loan Status	Loan Status	Loan Status	* What is the current status of your loan?	OCTS Contact Type Pick Applet		N
N/A	N/A	SR Resolution of Problem	Hold for a moment while I search for further information on [Area] in the database.	N/A		N
N/A	N/A	SR Decision Issue	[ExistText][Explanation].	N/A		N
N/A	N/A	SR Decision Issue How to Discuss	[ExistText] [Discuss]	N/A		N
N/A	N/A	Goodbye Q1	[NOTE: Can you resolve the issue now?]	N/A	If "NO", goto Goodbye Q3. If "YES", goto Goodbye Q2.	Y
N/A	N/A	Goodbye Q3	Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.]	N/A		N
N/A	N/A	Goodbye Q2	[NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to	N/A		N

			end the script.]			
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