

OCTS 2.0 Siebel Customization Report

OCTS 2.0 SIEBEL CUSTOMIZATION REPORT..... 1

SIEBEL CUSTOMIZATION REPORT SUMMARY 4

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ISSUES **ERROR! BOOKMARK NOT DEFINED.**

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LITERATURE..... **ERROR! BOOKMARK NOT DEFINED.**

RESULTS..... **ERROR! BOOKMARK NOT DEFINED.**

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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:

- A. **Data Mapping** – contains tables that show the names of the data fields and the columns and tables to which the data fields are mapped.
- B. **Picklists** – the names and actual values are listed for all new picklists. Additional values added to Siebel Vanilla picklists are also listed.
- C. **VB Code** – contains the actual code that was written for each screen.
- D. **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.
- E. **Assignment Manager** – contains information on the rules that were set up to assign cases to Ombudsman Specialists.

