

Activities View

The screenshot displays the Siebel Activities View for Case # 160. The interface is divided into several sections:

- Navigation Bar:** Cases, Issues, Accounts, Contacts, Activities, Literature, Results, Calendar, Script.
- Left Sidebar:** My Cases, My Team's Cases, All Cases, Activities, Attachments, Customer Satisfaction Survey, Case Issues, Results Search, Chats.
- Case Information Form (Top):**
 - Case #:** 160
 - Last Name:** Hyland
 - Account:** 388-54-1637
 - Referred By:** California Student
 - First Name:** Mary
 - Home Phone:** (417) 285-3118
 - Case Status and Ownership:** Intake Person: SADMIN, Status: Open, Sub-Status: Unassigned, Date Received: 7/29/00 4:55:48 PM.
 - Original Issue:** Category: Default, Sub Category: [empty], Summary: "Customer has..."
 - Revised Issue:** Category: [empty], Sub Category: [empty], Summary: [empty]
 - Customer Expectation:** Category: [empty], Sub Category: [empty], Summary: [empty]
 - Other Fields:** Svc Agency: Unknown, Loan Type: [empty], Loan Status: [empty], Web Notes: "Call Show Notes, Manager in Borrower"
- Activities List (Bottom):**

New	Case #	Activity Type	Description	Comments	Account
* 160	160	Call - Inbound	DCTS 1.0	"Ms. Hyland originally called our toll-	388-54-1637
* 160	160	Other	DCTS 1.0		388-54-1637
* 160	160	Call - Inbound	DCTS 1.0	"I called OSI Collection Services and	388-54-1637
* 160	160	Call - Inbound	DCTS 1.0	I have made several unsuccessful a	388-54-1637
* 160	160	Call - Inbound	DCTS 1.0	Old Greg Guzman at Great Lakes at	388-54-1637
* 160	160	Call - Inbound	DCTS 1.0	"Greg Guzman did bk. Gv following	388-54-1637
* 160	160	Correspondence	DCTS 1.0	Mailed Ms. Hyland a letter advising l	388-54-1637
* 160	160	Call - Inbound	DCTS 1.0		388-54-1637
* 160	160		DCTS 1.0	"Received and reviewed case histo	388-54-1637
* 160	160		DCTS 1.0	Left voice msg on Greg Ames of col	388-54-1637
* 160	160		DCTS 1.0	continue with today's entry called M:	388-54-1637

View Description:

The "Cases" screen, "Activities" view will often be navigated to via a hyperlink in the "Case #" field of the "Cases" screen "My cases," "My Team's Cases," or "All Cases" views. The primary purpose of this view is to provide an easy method of entering activities for a case, updating/performing existing activities, and listing all activities associated with a case. A toggle button is provided on the activities applet (the lower half of this view) which allows the user to decide how best to utilize the activity information.

OCTS Case Form Applet: *top half of view*

The form applet displays all pertinent case information for a given case in a single, scroll-free display. The data displayed is that of the active case in the list applet of the view from which the user navigated to this view. Most often this will be the case for which the user clicked the hyperlink in the "Cases #" field.

For a detailed data mapping please refer to Appendix B-2

OCTS Activity List Applet / OCTS Activity Form Applet: *bottom half of view*

This applet has a toggle button in its top, center section. This button allows the user to choose between the Activity List Applet or the Activity Form Applet.

Activity List Applet: While the list applet may be used to enter or update activities, its primary purpose is to provide a list of all of the activities that are associated with a particular case. If the user wishes to update an activity, he or she may enter the new information directly into the list applet or click on the toggle button to view and edit the case in the form applet. A hyperlink in the “Activity” field provides instant navigation to the “Activity” screen “Attachments” view so that the user may either view a list of attachments currently associated with the case activity, or so that the user may add an attachment to the case.