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# **Data Conversion Specifications Document**

September 18, 2000

**SFA Ombudsman Case Tracking System (OCTS)  
Version 2.0**

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## Appendices

Appendix A – OCTS 1.0 to OCTS 2.0 Data Element Mapping

## Introduction

This document contains the Data Conversion Specifications for the migration of data from the existing Ombudsman Case Tracking System (OCTS) 1.0 and National Student Loan Data System (NSLDS) to the new OCTS 2.0 Siebel application. It is organized into the following sections:

- Data Conversion Plan
  - Data Conversion Overview
  - Data Conversion Overview Process Flow
  - Data Conversion Detailed Tasks
- Data Element Mapping
- Data Conversion Validation

This document is Deliverable #11.2.6 Data Conversion Specifications as outlined in Task Order #11, Modification 1: Ombudsman CRM Implementation.

# Data Conversion Plan

The Data Conversion Plan outlines an overview, process flow, and detailed tasks associated with the Data Conversion process.

## Data Conversion Overview

The source data for the OCTS 2.0 Siebel application is the OCTS 1.0 data and the NSLDS data. The fields to be retrieved are specified in Appendix A-OCTS 1.0 to OCTS 2.0 Data Element Mapping of this document. In order to import this data into the OCTS 2.0 application, SQL queries need to be performed on both the OCTS 1.0 and the NSLDS data. These SQL queries are used to create comma or carrot (^) delimited text files. This data will be cleansed in accordance with the Data Cleansing Procedures section of this document to remove duplicate or errored data generated by the OCTS 1.0 system.

The cleansed text files are loaded into Siebel Staging Tables via an SQL Loader. The Staging Tables are necessary since the text files cannot be loaded directly into the IF Tables because of data manipulation which needs to be performed before importing the data into the OCTS 2.0 system. In addition, the IF Tables do not have a 1:1 (one-to-one) relationship with the legacy systems (e.g. OCTS 1.0 and NSLDS). Thus, the Staging Tables maintain a 1:1 (one-to-one) relationship between the legacy systems and the OCTS 2.0 Siebel database. After being loaded into the Staging Tables, data can be refined and set to various values like default, default columns, mandatory columns, etc. in the Staging Tables. For example, OCTS 1.0 did not require an Social Security Number (SSN) field be populated. Since OCTS 2.0 requires a populated Account field (which is the SSN), we will insert a default value for all OCTS 1.0 non-populated SSN fields.

After the above steps are performed in the Siebel Staging Tables, the data is migrated from the Staging Tables to the Siebel IF Tables via a SQL Loader. The Siebel IF Tables are the entry point into the Siebel system. Because we are using extended fields in the Business Component definition (as specified in Appendix A of this document), the IF Tables are mapped to those fields using Siebel Tools.

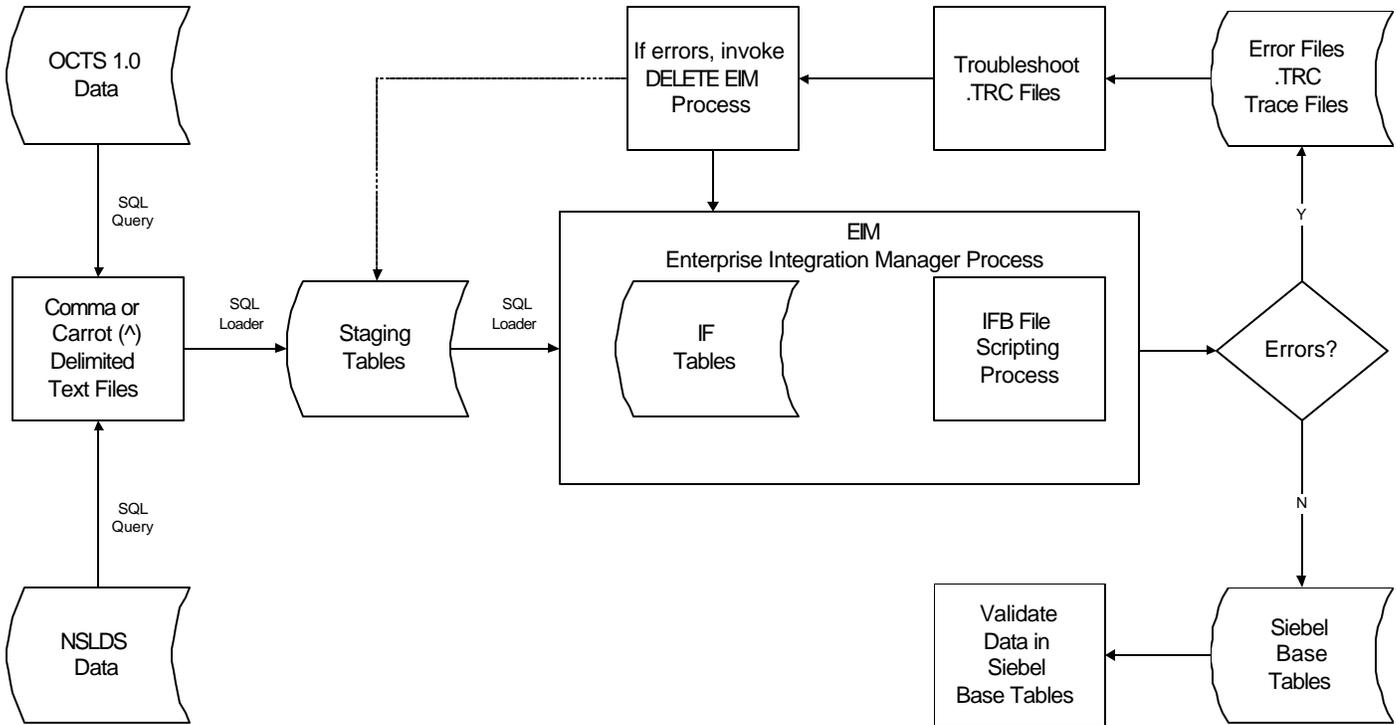
The IFB File Scripting Process is then created to perform specific tasks to allow the data to be imported from the IF Tables within the EIM (Enterprise Integration Manager) process. The EIM process is a specific application which Siebel uses as an import/delete/merge/export mechanism to convert data from legacy systems into Siebel.

If there are errors during the EIM Process, the errored data is written into error files, known as .TRC or Trace Files. These Trace Files will then be reviewed to troubleshoot the cause of the error during the EIM Process. After the error is determined and then corrected (if required), the DELETE EIM Process will be invoked to purge the data already created by the EIM Process. Depending on the cause of the error, corrections will be made to data in the Staging Tables or the IF Tables and the IFB File Scripting Process and the EIM Process will need to be re-executed until the error is corrected.

If there are no errors during the EIM Process, data is loaded into the Siebel Base Tables (e.g. S\_ORG\_EXT, S\_CONTACT, S\_ASSET). After this occurs, the data will need to be validated in the Siebel Base Tables to ensure the data has been populated as expected. Validation consists of matching reports from OCTS 1.0 to reports from OCTS 2.0, which ensures that all data has been

properly loaded. These procedures are specified in the Data Conversion Detailed Tasks and Data Conversion Validation sections of this document.

## Data Conversion Overview Process Flow



## **Data Conversion Detailed Tasks**

Please refer to Deliverable #11.2.7 Data Conversion Report for the detailed tasks for each Data Conversion effort.

## Data Element Mapping

The Data Element Mapping describes the Siebel OCTS 2.0 fields to be populated and the corresponding source of the Siebel application's input—OCTS 1.0 and NSLDS. Not only does this mapping facilitate the data conversion process by mapping specific fields, but it can also be used as a training tool to educate users about the new Siebel fields, examples of acceptable values in these fields, and the corresponding OCTS 1.0 field.

In particular, the OCTS 1.0 to OCTS 2.0 Data Element Mapping (Microsoft Excel spreadsheet) contains the following columns:

| <u>Column Name</u>           | <u>Description</u>  |
|------------------------------|---|
| • No.                        | - Reference number for data mapping.                              |
| • Siebel Business Object     | - Siebel object layer.  |
| • Siebel Business Component  | - Siebel business layer.  |
| • Siebel Column Name         | - Siebel column name of Business Component.                       |
| • Siebel Table Name          | - Siebel table name of database.                                  |
| • Siebel IF Table Name       | - Siebel IF table name.   |
| • Siebel IF Column Name      | - Siebel IF column name.  |
| • Siebel Display Name        | - How the field will appear on the Siebel GUI.                    |
| • Siebel Logical Field Name  | - Siebel column name of Business Component.                       |
| • Siebel Value (Example)     | - An example of an acceptable entry into the field.               |
| • Siebel Stored In Siebel As | - How the values are stored in the Siebel tables.                 |
| • Siebel Picklist?           | - Is this field a picklist in Siebel?                             |
| • Siebel Picklist Type       | - The type/name of the picklist in Siebel.                        |
| • Siebel Picklist Value(s)   | - The acceptable picklist values in Siebel.                       |
| • Legacy Picklist?           | - Is this field a picklist in the legacy system?                  |
| • Legacy Picklist Value(s)   | - The acceptable picklist values in the legacy system.            |
| • Legacy Source              | - Source of populating the Siebel field (i.e. OCTS 1.0 or NSLDS). |
| • Legacy GUI Window Name     | - The name of the legacy system GUI or window.                    |
| • Legacy GUI Field Name      | - The field name displayed on the legacy system GUI.              |
| • Legacy Table               | - OCTS 1.0/NSLDS table name.                                      |
| • Legacy Field Name          | - OCTS 1.0/NSLDS field name.                                      |
| • Legacy Type                | - OCTS 1.0/NSLDS field parameters.                                |

Please refer to Appendix A – OCTS 1.0 to OCTS 2.0 Data Element Mapping.

## Data Conversion Validation

The purpose of the validation process is to ensure that the OCTS 1.0 and NSLDS data have been correctly imported into the OCTS 2.0 Siebel application. The Data Conversion Validation has been incorporated into the steps outlined in the Data Conversion Plan of this document. In particular, the Validation Points include:

- Validating the number of Reference data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Employee data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Accounts data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Contacts data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Service Request data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Activities data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Assets data batches imported into the OCTS 2.0 Siebel base tables.
- Validating the number of Customer (A) records from the OCTS 1.0 data set equals the number of Accounts and the number of Contacts in the OCTS 2.0 Siebel application.
- Validating the number of Case-Inquiry (B) records from the OCTS 1.0 data set equals the number of Cases in the OCTS 2.0 Siebel application.
- Validating the number of Contact (C) records from the OCTS 1.0 data set equals the number of Activities in the OCTS 2.0 Siebel application.
- Performing application/integration testing to see if the interworkings of the OCTS 2.0 Siebel application function properly.