

Task Order 110 – FP Data Mart Operations

FP Data Mart Operations Monthly SLA Metrics Report Deliverable 110.1.1a

Period Ending: 06/30/02



**F E D E R A L
S T U D E N T A I D**

We Help Put America Through School



Task Order 110 – FP Data Mart Operations

Introduction.....	3
FP Data Mart Availability for Production.....	3
FP Data Mart Operations Status	4
Work Accomplished During This Period.....	4
Issues or Anticipated/Current Problems.....	4
Planned Work for Next Period.....	4
Help Desk Monthly Throughput.....	5
Help Desk Request Summary	6
Help Desk Request Details	8



Task Order 110 – FP Data Mart Operations

Introduction

This is the June monthly report for Task Order 110 – FP Data Mart Operations. The purpose of this task order is to provide the capability to sustain the FP Data Mart.

FP Data Mart Availability for Production

**Note: Downtime for backups and scheduled outages are not shown

Date	Availability (%)	Notes
Sat - June 1	100%	
Sun - June 2	100%	
Mon- June 3	100%	
Tues - June 4	100%	
Wed - June 5	100%	
Thurs - June 6	100%	
Fri- June 7	100%	
Sat - June 8	100%	
Sun - June 9	100%	
Mon - June 10	100%	
Tues - June 11	100%	
Wed - June 12	100%	
Thurs - June 13	100%	
Fri - June 14	100%	
Sat - June 15	100%	
Sun - June 16	100%	
Mon - June 17	100%	
Tues - June 18	100%	
Wed - June 19	100%	
Thurs - June 20	100%	
Fri - June 21	100%	
Sat - June 22	100%	
Sun - June 23	100%	
Mon - June 24	100%	
Tues - June 25	100%	
Wed - June 26	100%	
Thurs - June 27	100%	
Fri - June 28	100%	
Sat - June 29	100%	



Task Order 110 – FP Data Mart Operations

Date	Availability (%)	Notes
Sun - June 30	100%	

FP Data Mart Operations Status

Work Accomplished During This Period

- Completed monthly FP load for May.
- Provided daily monitoring of FP data mart availability.
- Continued tracking SIRs and enhancement requests.
- Continued to update user login information (add, remove, and reset IDs).
- Completed Data Mart Migrations for FP.
- Held bi-weekly FP Meetings with Power Users.
- Completed parallel testing for Informatica Power Center 5.1.2 upgrade

Issues or Anticipated/Current Problems

- None

Planned Work for Next Period

- Continue MicroStrategy reporting enhancements and completion of outstanding SIRs.
- Continue to provide daily monitoring of FP Data Mart.
- Continue to update user login information (add, remove, and reset IDs).
- Continue issue resolution for open FP requests.
- Complete June FP monthly data load.
- Transition to Informatica Power Center v5.1.2.
- Begin planning for upgrade to Microstrategy v7i.



Task Order 110 – FP Data Mart Operations

Help Desk Monthly Throughput

Bug Fix

Category	High	Medium	Low	Total
Carry Forward	1	3	1	5
New	0	0	1	1
Closed	0	1	0	1
End of Month Balance	1	2	2	5

Prod. Support

Category	High	Medium	Low	Total
Carry Forward	0	0	1	1
New	1	0	0	1
Closed	1	0	0	1
End of Month Balance	0	0	1	1

Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	0	3	6	9
New	0	2	0	2
Closed	0	2	1	3
End of Month Balance	0	3	5	8

Help Desk

Category	High	Medium	Low	Total
Carry Forward	0	0	0	0
New	5	1	0	6
Closed	5	1	0	6
End of Month Balance	0	0	0	0



Task Order 110 – FP Data Mart Operations

Help Desk Request Summary

Total Requests: 24

ID	Status	Request	Title	Priority	DateOpened	DateClosed
227	1	Bug Fix	Page-by area not working as expected	Medium	6/4/2001	
230	1	Bug Fix	Login before projects are displayed	High	9/6/2001	
280	1	Bug Fix	Problem with Part IV	Medium	11/15/2001	
334	1	Bug Fix	Subtotals appearing at top of Report	Low	2/21/2002	
382	5	Bug Fix	Problem with Part II/Part V Disbursement comparison	Medium	5/1/2002	6/2/2002
464	1	Bug Fix	Add "s" to Report Titles	Low	6/27/2002	
228	1	Enhancement	Search for Lender by name	Medium	6/4/2001	
80	1	Enhancement	Drill to multiple templates in report - E32	Low	7/28/2001	
291	5	Enhancement	Consolidation Holder Report	Medium	12/14/2001	6/2/2002
338	1	Enhancement	We need to use dynamic quarter prompts	Low	2/22/2002	
341	5	Enhancement	Consolidated Loan Fee Analysis lack of "LP" payment type	Medium	2/28/2002	6/2/2002
342	1	Enhancement	No Limit for login attempts	Low	3/4/2002	
343	1	Enhancement	OCIO Password Requirements not met	Low	3/4/2002	
368	5	Enhancement	Enhance the performance of Active & Inactive Lenders reports	Low	4/15/2002	6/17/2002
443	1	Enhancement	Correct/add parent Lender name, city and state information	Medium	6/3/2002	
456	1	Enhancement	Automated Report to check for GA Access Violation	Medium	6/17/2002	
451	5	Help Desk	Reset Robert Bridgman's password	High	6/5/2002	6/5/2002
452	5	Help Desk	reset production FPDM access password for Leslie Richards	Medium	6/10/2002	6/11/2002
455	5	Help Desk	Reset Susan Haenel-Beck's Password	High	6/10/2002	6/10/2002
460	5	Help Desk	Reset Bradley Mayer' Password	High	6/18/2002	6/18/2002



**FP Data Mart Operations Monthly SLA Metrics Report
Deliverable 110.1.1a**

Task Order 110 – FP Data Mart Operations

ID	Status	Request	Title	Priority	DateOpened	DateClosed
461	5	Help Desk	Create user account for Johan	High	6/21/2002	6/24/2002
463	5	Help Desk	Reset Paul Sullivan's Password	High	6/26/2002	6/26/2002
157	1	Prod. Support	Data Mart users lose access when NT patches are installed	Low	7/18/2001	
459	5	Prod. Support	User gets server error when trying to subscribe to a report	High	6/18/2002	6/18/2002



Task Order 110 – FP Data Mart Operations

Help Desk Request Details

Total Records: 24

ID: 80 - Drill to multiple templates in report - E32

Request Enhancement **Priority** Low **Assigned** Tina Liu
Open Date: 7/28/2001 10:00:00 AM **Requestor** Susan Haenel-Beck
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

Drill to multiple templates for "Consolidation Load Fee Payment Analysis Report"

Resolution:

Activity

8/21/2001 (Annie Barton) Waiting for new release of Microstrategy

8/22/2001 (Keisha Contee) Our Microstrategy Case #137013 for this enhancement has been logged as an enhancement (Log id 127716) on the Microstrategy Side. We need to wait for a release that states, 127716 has been fixed.

11/29/01 (Bob Audet) Called MicroStrategy Technical Services to verify the status of the enhancement. Currently not fix date has been determined by MicroStrategy Technology. Estimated time would be Q2 2002, second release of 7.2. Reassigned to Robert Audet.

1/2/2002 (Tina Liu) Reassigned to Tina

1/22/2002 (Tina Liu) Discussed with Ahmad and he suggested to put the request type to Enhancement because we do not know if the Phase II will be using MSTR 7.2 or not.

ID: 157 - Data Mart users lose access when NT patches are installed

Request Prod. Support **Priority** Low **Assigned** Tina Liu
Open Date: 7/18/2001 10:00:00 AM **Requestor** Annie Barton
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

Data Mart users lose access to Microstrategy reports when patches are installed on the NT server.

Resolution:

Reassign Security Roles for each project on the server. See Applications Maintenance manual for further details.



Task Order 110 – FP Data Mart Operations

Activity

7/18/2001 (Keisha Contee) Annie logged problem on the Microstrategy web site. Microstrategy suggested we upgrade to version 7.1.1 and the problem would be resolved. We are currently running version 7.1.1. Annie will continue to investigate the issue.

11/26/01 (Bob Audet) We tried to add groups in 2-tier mode with server down. Still does not work. Reassigned to Bob.

12/14/01 (Bob Audet) Recommend further research. May want to postpone until next upgrade at DOE.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/3/2002 (Tina Liu) Reassigned to Mark.

1/23/2002 (Tina Liu) Reassigned to Tina.

1/29/2002 (Tina Liu) Called MSTR Tech Support and logged a new issue #156885. Needs to verify on I-server version (7.1 had this bug but was fixed in newer versions) Left a message on Benson's answer machine.

1/30/2002 (Tina Liu) The I-server version is actually 7.1, so it is an known issue for MicroStrategy. This bug is fixed on 7.1.1. We will need to wait until the upgrade to 7.2 to have this issue fixed because no other intermediate upgrade is planned for now. Remove the target date for now.

ID: 227 - Page-by area not working as expected

Request	Bug Fix	Priority	Medium	Assigned	Tina Liu
Open Date:	6/4/2001 10:00:00 AM	Requestor	Nancy Krecklow		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

This was logged as a problem with MicroStrategy. The MicroStrategy case number is: 130845. During testing, we fixed the report that had the problem, however there is the possibility that a user may modify their version of a report to re-create this problem.

Resolution:

Activity

7/10/2001 (Annie Barton) Defect in Microstrategy. Need to wait for new release to fix the problem.

11/29/01 (Bob Audet) Called MicroStrategy Technical Support to gather further information regarding this issue. Tech Support person recommended upgrading to 7.1 sp3 or ideally 7.1 sp4. This issue was fixed in the ASP code version 7.1.312.114. Need to decide if we will upgrade to 7.1 sp4.



Task Order 110 – FP Data Mart Operations

1/3/2002 (Tina Liu) Reassigned to Tina.

1/4/2002 (Tina Liu) After discussing with Tom, this bug fix is postponed to after MSTR 7.2 release.

ID: 228 - Search for Lender by name

Request	Enhancement	Priority	Medium	Assigned	Tina Liu
Open Date:	6/4/2001 10:00:00 AM	Requestor	Nancy Krecklow		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		
Description					

The users wanted to be able to lookup by a lender name instead of a lender id. Annie put in most of the ability to do this, but then ran into a problem with MicroStrategy. She logged a MicroStrategy case number: 128596. Annie was able to allow a user to lookup a lender by typing in a one-word name, but the problem comes in when trying to search when multiple words are given.

Resolution:

Activity

6/7/2001 (Annie Barton) Paul requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

7/10/2001 (Annie Barton) Defect in Microstrategy. Need to wait for new release to fix the problem.

8/4/2001(Annie Barton) Susan Haenel-Beck requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

11/29/01 (Bob Audet) Called MicroStrategy Technical Support and they fixed confirmed the issue for release 7.2 Beta 1. I recommend that we wait until general availability of 7.2 in Q1 of 2002.

1/2/2002 (Tina Liu) Reassigned to Tina.

ID: 230 - Login before projects are displayed

Request	Bug Fix	Priority	High	Assigned	Tina Liu
Open Date:	9/6/2001 10:00:00 AM	Requestor	Annie Barton		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		
Description					

For security purposes it is better if the user logs in first and then chooses the appropriate project. This method will only display the projects the user can access. With situation, when the users' password expires, they are not prompted to change it and locked out of the project.



Task Order 110 – FP Data Mart Operations

Resolution:

Activity

9/6/2001 (Annie Barton) Awaiting a new release in Microstrategy to implement this new procedure.

11/26/2001 (Bob Audet) This issue is linked to issue #229, Assigned to Bob.

11/29/01 (Bob Audet) Emailed the FP Power Users to decide if this issue should be closed since a workaround from Issue #229 was provided and the issue subsequently closed.

12/03/01 (Bob Audet) Moved to 'Needs Clarification' because the FP Power Users need to decide whether this issue can be closed since it is similar to Issue #229 that was closed.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/11/2002 (Tina Liu) Sent email to Nettie Harding for action update.

1/18/2002 (Tina Liu) called Nettie to clarify the status and then called Tech support, logging two issues: 155688 for desktop password expiration reminder and 155689 for web login twice. Tech support for issue 155689 provided a resolution: log in as Administrator, click on a project -> preferences -> Project defaults -> Project display and change the Project list selection from "Show all the projects connected to the Web Server before the user logs in" to "Log in, then show the projects accessible by the supplied login". This setting will not hold after user logs out and then relogin after a while. Reset the target date to 2/1/2002.

1/22/02 (Tina Liu): The preference setting on production server was actually successful after rechecking it today. But the dev web server reported error: "Error Saving Personal Preferences. Your project default preferences could not be saved. Your permissions on the Web folder or in its contents may be incorrect". MSTR Tech Support provided two tech notes "TN5600-7X0-0304" and "N5600-7X0-0142" to tackle this issue. Sent email to Benson Hwang for the security property setting of file AdminOptions.xml on dev server. Benson changed the setting to allow changes, now it works on dev server as well.

1/29/02 (Tina Liu): The login and projects setting works fine with MSTR Web 7.1.2 version but is not stable for the 7.1 version. For the password expiration problem, MSTR Tech support is still investigating on it. For now, run scripts in MSTR Command center to gather user profiles and run a java program `accenture.modpartner.datamart.FileTransform` to change the format of the user profile files to be sorted in ascending order based on the password expiration time and put properties of the same user into one row, which may later be exported to an Excel file and sent to Willie Sutton. The first file generated on today has already been sent to Willie to review.

1/30/2002 (Tina Liu): MSTR Tech Support sent email confirming that the password expiration problem has been fixed for MSTR Web release 7.2, which is scheduled to come in late Q1/2002 or early Q2/2002. Change the status to be postponed until the next upgrade to MSTR 7.2.

2/11/2002 (Tina Liu): Figured out the unstable setting problem is indeed a dual-web server issue. When the setting was changed, it was only applied to one of the web servers, this is why we may observe different



Task Order 110 – FP Data Mart Operations

behavior for the default page. Set to use "Login.asp" for both web servers. The password expiration problem will still occur. Needs to remind users to use "Projects.asp" to change password when it is reset by the administrator to force change of password at next login.

ID: 280 - Problem with Part IV

Request Bug Fix **Priority** Medium **Assigned** Tina Liu
Open Date: 11/15/2001 2:15:00 PM **Requestor** Susan Haenel-Beck
Target Date: 2/1/2002 **Estimated Effort** 0
Closed **ApplicationType:** FP DataMart

Description

There is a problem with the data in Part IV for LID 809479, quarter ending 3/31/99. It seems that the amounts are doubled for this quarter; however, in corresponding Part V, the balance is correct. This is throwing off all of our analysis reports. Please take a look at this to see what may be driving the error.

Resolution:

11/19/01 (Mark Mandrella) - the data in the database is correct; what the report is extracting are records of document types ON and SN (Original and Supplemental Submissions). This particular lender code had a high number of type SN's and made the amount look double. It is yet to be determined if the report should only include type ON.

Activity

11/27/01 (Mark Mandrella) - re-opening this issue for the time being. Susan is meeting this week with some FP people and they may want to change this report in some way to avoid the ON and SN mixup.

12/05/01 (Bob Audet) Here are Susan's comments:

Sorry, Mark. We discussed this with Bob Audet (sp?). It seems to be affecting a minor portion of lenders and is an issue with how E-Systems processed some 799's. The payments were not made on the original submissions but there are amounts reported in the ending principal balance and average principal balance fields. The supplemental was then processed and resulted in duplicate balances (but not payments).

At our meetings, it was determined that if we can identify these lenders, a change to the database can be made to prevent duplication. Ahmed is our contact on this change and I'm working with him to see if we can resolve it. Should I work with you first?

1/3/2002 (Tina Liu) Reassigned to Mark.

2/5/02 (Mark M): SIR is postponed while users do a data review. Here is the email from Susan:

The duplication of data was caused by multiple 799's and the way E-Systems processed the data. There are a limited amount of borrowers affected and Angela was trying to quantify the problem so that data corrections



Task Order 110 – FP Data Mart Operations

could be made. It is still at that point. I will follow-up with Angela on this.

2/7/2002 (Tina Liu): Tried a workaround for this case using the following formula to calculate the affected metrics: (Original metric calculation)/Count <distinct=True>(Processing Date) {~+}. Sent email to Nancy, Ahmad, CC to Susan and Mark for opinions. The following is the email replied by Susan:

"Tina: I'm not sure if this will work. I have left you a voice mail message so we can discuss it further. I don't want to be difficult on this but I think the fix may cause further damage. Here is my research and my thoughts.....

For the most part, if a form is processed and then reprocessed, the first form usually does not have any balances and the second one is the "real" form, thus, the correct data overlays in the datamart. This is the norm on resubmissions from what I can gather. In some cases, there may be balances reported but with no payment information - that is contained in the second form - which is what occurred here. Will this manner of handling multiple forms negate the first submission automatically? (We may not want that.)

Just a side note - I've been told that this particular problem is only caused by a small number of lenders and is the result of incorrect coding by E-systems in Part IV only. The forms were reprocessed by ED to correct errors but, for some reason, the initial submission was not "zeroed" out in Part IV. Perhaps we need to get somebody involved with 799 processing to give us a background information? Right now, I am still waiting for the error to be quantified and should have more information on Monday.

I'm concerned also because data that will be processed in the new LaRS system will allow for multiple entries/submissions. Will this impact on how ALL multiple submissions are processed?

I think we need to review how this change will impact the future processing as well as affected lenders which were keyed correctly - in this case, the change may be worse than having a few duplicates.

I'm cc'ing Willie Sutton on this message as he has also been asking me about this. "

After discussing with Susan over the phone, sent out the following email to her and other related people.

"

Just a brief summary for our discussion over the phone:

1. At your end, investigation is still going on to identify those lenders who has this problem for their 799 form Part IV.
2. At this point, we are not sure what fields can be duplicate. For the lender you have discovered, duplicate fields are "Ending Principal Balance" and "Avg. Daily Principal Balance" for Part IV of 799, but it is also possible that the payment field is duplicate but not the others.
3. It is the best if we can correct the E-processing problem and prevent any future "breakout" on the same issue.
4. Another alternative is that after qualifying and quantifying the problem, we add some conditions for those special cases to the affected metrics calculation. For example, if lender ID = <the lender ID that has the problem> and Fiscal Quarter ID = < the quarter ID that has the problem> then calculate the affected metrics in a different way (as suggested in the workaround), for other cases, keep the original calculation intact.



Task Order 110 – FP Data Mart Operations

"

Susan will have a conference call with Angela on Monday, then we will discuss this issue again in FP Data Mart Release 2 meeting next Tuesday.

2/20/02 (Tina Liu) Reassigned to Tina. Discussed with Susan for possible workaround. Added one column of "Processing Date" to the report and put it on Enhancement\ID280 for Susan and related clients to review.

2/27/02 (Tina Liu) Susan sent email suggesting the following fix:

"

In many of the reports we use in "lender-other reports," there is a comparison of parts using summary data...this is a general statement. In those cases, processing date data would be nice so that a user could tell if, for example, any numeric errors may be caused by multiple submissions.

However, on the "lender reports" reports, most of that is straight data configured in a report format, i.e. no comparisons or analysis. Couldn't we just list the ON and SN documents separately by processing date....here is an example:

QTR	- Processing Date	- Ending Prin	- Avg Prin	- Amt Paid
3/01	2/22/01	10000	5000	10.00
3/01	2/28/01	200	175	5.00

Therefore, if there was another ending balance on the report (or average if we think that easier), a separate quarter entry would be made.

"

Sent reply to Susan:

"

Thanks for the clarification. If my understanding is correct, you want all affected reports to have "Processing Date" shown up on the report. But for the "Lender Reports" or so called straight reports, do you also want document type "ON" and "SN" shown up as well?

"

Got reply:

"do the G/L Comparison report in Lender-Other Reports and Part IV and Part II, in Lender Reports. "

2/28/02 (Tina Liu): Put three reports on enhancement folder and sent email to Susan to verify.

ID: 291 - Consolidation Holder Report

Request	Enhancement	Priority	Medium	Assigned	Tina Liu
Open Date:	12/14/2001 10:00:00	Requestor	Nettie Harding		
Target Date:	2/8/2002	Estimated Effort	0		



Task Order 110 – FP Data Mart Operations

Closed 6/2/2002 1:00:00 PM **ApplicationType:**FP DataMart

Description

Need adhoc report ASAP that provides: Attributes--Lender Name and ID, City, State, Loan Status Code, Quarter End Dates; Metrics--Ending principal balance on Part V and the amount is greater than "0". Would like to get report prompted on Loan Status so that just "TC" type loans can be selected and can get it grouped by parent or not grouped by parent. Currently interested in quarters ending 12/31/1999 through

Resolution:

Activity

12/14/01 (Bob Audet) Started to work on the report and have run into some issues with the number of rows returned exceeds the governing limits set by the FP project. Need to ask Nettie if we can prompt off of other information to reduce the number of rows returned.

1/2/2002 (Tina Liu) Reassigned to Tina.

1/3/2002 (Tina Liu) Reassigned to Mark.

1/18/2002 (Tina Liu) Reassigned to Tina, reset target date to be 2/8/2002. Called Nettie for clarification, left a message. Sent an email to her as well. Worked out a sample report with an extra state prompt to reduce the number of rows returned. Sent email to Nettie for testing.

2/5/2002 (Tina Liu) Called Nettie for status update. She said she will call back after she goes over all her emails. After discussion with Nettie, state prompt is removed from the report, a couple of prompts are added for users to input the rank range for the ending principal balance broken down by quarter ending dates. Sent email to Nettie for verification on the new report.

2/27/2002 (Tina Liu) Got email from Nettie:

"

When requesting the report by parent, the report should display the "parents" with the consolidated portfolios of all the children. For example, for the qtr 9/30/2000, 833253 "Chase, USA Trust/SLMA Trust MS1814" is displayed as the first record with an ending balance of \$8.9B. If you look further in the report that same number appears with the same name and a different amount; that is because the parent number of "833253" makes up a total of 47 LIDs in the grouping. Therefore, the first record should add all of the amounts of the 47 LIDs and display one amount to the parent grouping. I also provided a list of the parent names that should be displayed instead of what is assigned to that LID.

"

Needs to update the parent lender name column with the correct parent lender names rather than using the same name as the corresponding lender name. Nettie will send me the parent lender name list. Changed the priority to medium because the client does not need it immediately.

3/15/2002 (T.Liu): Applied workaround to the report, sent email to Nettie to verify:

"



Task Order 110 – FP Data Mart Operations

Hi Nettie,

I worked out a workaround for the Parent Lender issue. Now we have two separate reports for lenders and parent lenders. The report for lenders is straightforward as you expected, but the report for parent lenders is a little bit different: There are four metrics columns on the report, from left to right, the first metric column shows the total ending principal balance (799: V) for each state the corresponding parent lender may have children lenders locate there. The second metric column shows the total ending principal balance (799:V) for the corresponding parent lender. The third metric column shows the % of the first metric column value over the second metric column value, in another word, it shows the market share for each associated state of the corresponding parent lender. The forth metric column is the rank value, which is grouped at the parent lender level.

Please verify if the new report format is acceptable. They locate at the dev/testing web (URL: <http://4.20.15.244/MicroStrategy7>):

Shared Reports/Enhancement/ID291

There are three reports in that folder:

1. Consolidated Holder Report Draft: this is the first version of the report. I leave it there for you to compare the difference.
2. Consolidated Holder Report for Parent Lender: this is the new version of the report for parent lenders.
3. Consolidated Holder Report for Lender: this is the new version of the report for lenders.

Please also send me the parent lender name list so that I can update our database.

ID: 334 - Subtotals appearing at top of Report

Request	Bug Fix	Priority	Low	Assigned	Lisa Phillips
Open Date:	2/21/2002 12:26:00 PM	Requestor	Susan Hannelbeck		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		
Description					

When running the Part II and Part III reports from the web the totals are displayed at the bottom of each lender. When moving the "Quarter Ending Date" from the columns to rows, the subtotals now appear at the top of each lender.

Resolution:

Activity

2/21 (LP): In a meeting with the power users it was discussed that we move the Qtrs from the column to the rows in template to fix the problem.



Task Order 110 – FP Data Mart Operations

2/21(LP): Could not move the Qtrs from the column to rows. Error still occurs. This is a problem with MSTR 7.1 but has been identified for the next release: This note is from their support site:

Defects and enhancements addressed in MicroStrategy 7 7.1.3
MicroStrategy Agent 7.1.1 TS Case 141024 Subtotals are always displayed at the top if attributes are sorted

Sent an email to Susan: Susan,
I have been working on these two reports and moving the Quarter from the rows to columns and this has not solved the problem. We have determine that this is a bug with MSTR 7.1 after reviewing the known bugs from their support website (see below). This issue will be resolved in the next release so I am going to postpone this request.
Thanks,
Lisa

ID: 338 - We need to use dynamic quarter prompts

Request	Enhancement	Priority	Low	Assigned	Tina Liu
Open Date:	2/22/2002 9:07:00 AM	Requestor	Tina Liu		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		
Description					

Some quarter prompts in FP data mart use a pre-selected element list with the ending quarter of September 2001 (or December 2001) should be changed to be dynamic prompts that will include only those valid quarters that appear in the related fact source table(s).

Resolution:

Activity

2/22/2002 (Tina Liu): Opened the issue and assigned to Tina. This is postponed due to a bug with MicroStrategy Web 7.1 (it does not support set qualification type of filter). Should be fixed in 7i release on March-April time frame.

ID: 341 - Consolidated Loan Fee Analysis lack of "LP" payment type

Request	Enhancement	Priority	Medium	Assigned	Mark Mandrella
Open Date:	2/28/2002 12:30:00 PM	Requestor	Susan Haenel-Back		
Target Date:	3/22/2002	Estimated Effort	0		
Closed	6/2/2002 1:00:00 PM	ApplicationType:	FP DataMart		
Description					

Susan found the following problem:
"

I have found a problem in one of the reports and how the information is projected. On the CL Fee Reports,



Task Order 110 – FP Data Mart Operations

there are a number of different transaction types. We use two ID's primarily - RF and VO. However, there is a third code that needs to be reflected: LP. This code seems to be overriding the RF codes and causing blank entries under the RF columns in both reports.

"

Resolution:

Activity

2/28/2002 (Tina Liu): assigned to Mark. Needs clarification on reports:

Two reports are:

Consolidation Loan Fee Payment Analysis, in "Risk Assessment" folder
Consolidation Loan Rebate Fee, in "Lender - Other Reports" folder (not sure?)

3/1/02 (Mark M): email from Susan to Tina answering some questions:

I took a look at one of the reports and I have opened a SIR for this issue. Mark is assigned to resolve it, he will contact you directly. Here are some questions I have:

1. I only found one report that has those two types of loan payment listed: Consolidation Loan Fee Payment Analysis. What is the other one?

In "Lender - Other Reports", Consolidation Loan Rebate Fee Payments.

2. do you want to include the "LP" type of payment in the affected report using the same way as the other two payment types? I checked the lookup table for the payment types and found out that there are other payment types as well. Can you explain to us the criteria of selecting the payment types for the particular report?

1. In the "Analysis" Report under the "Risk Assessment" folder, there is a payment counter. The payment type of "LP", which is a refund to the lender by ED is not being counted."

2. In the "Payment History" report under "Lender- Other Reports", this type of payment should come up along with an "RF" payment type. It seems to be overriding the "RF". On one LID, there shows only "LP" but no "RF". I don't believe when we set up the report, we were considering the LP payment type. I need to make sure that this payment type is being stated in the report.

3/11/02 (Mark M): modified the reports on the DEV area, and asked Susan to verify that they were correct, or if she sees a potential data error somewhere. She replied she will review them later in the week, since she has other reports do get finished.

3/12/02 (Mark M): response email from Susan: "Mark: There should also be a like change on the CL Fee Payment History which is currently located under 'Lender-Other Reports'. Our main concern is that the 'LP'



Task Order 110 – FP Data Mart Operations

ID: 342 - No Limit for login attempts

Request	Enhancement	Priority	Low	Assigned
Open Date:	3/4/2002 8:15:00 AM	Requestor	Nancy Krecklow	
Target Date:		Estimated Effort	0	
Closed		ApplicationType:	FP DataMart	

Description

There is no limit to the number of invalid access attempts that may occur for a given user on the CMDM

Log: (or any datamart).

not overlay any other information. I will check this out this morning on the other report as per your request." Case entered with Microstrategy (#160279)

Resolution:

3/12/02 (Mark M): phone call from Susan expressed concerns about the way the LP types are reported. She has to confirm how the data is being processed into the system. It may be the case that the LP's are entered by Parent ID only (as a consolidation of all the child ID's). She wants to verify how these LP's are coming

Activity

in and will get back with me.

5/13/02 (Mark M): emailed Susan to see if he had spoken to Angela yet regarding the parent ID issue.

ID: 343 - OCIO Password Requirements not met

Request	Enhancement	Priority	Low	Assigned
Open Date:	3/4/2002 8:15:00 AM	Requestor	Nancy Krecklow	
Target Date:		Estimated Effort	0	
Closed		ApplicationType:	FP DataMart	

Description

Password requirements do not adhere to the minimum OCIO requirements in terms of length and composition (8 characters consisting of 1 capital and 1 numeric character)

Microstrategy Case #160279

Resolution:



Task Order 110 – FP Data Mart Operations

Activity

ID: 368 - Enhance the performance of Active & Inactive Lenders reports

Request	Enhancement	Priority	Low	Assigned	Tina Liu
Open Date:	4/15/2002 9:25:00 AM	Requestor	Tina Liu		
Target Date:	4/19/2002	Estimated Effort	0		
Closed	6/17/2002 4:03:00 PM	ApplicationType:	FP DataMart		

Description

Current reports (Active & Inactive Lenders in "Lenders - Other Reports" folder) may take a long time to run. A new approach has been discovered, which needs to apply to both reports. Meanwhile, the prompt of last fiscal quarter ID may need to be taken out of the report. The last fiscal quarter ID can be got from the new lookup table LKP_LOAD_DATE.

Resolution:

Keep the last fiscal quarter prompt but enhance the performance.

Activity

4/15/02 (T.Liu): Opened the issue and assigned to Tina.
 4/22/02 (T.Liu): Generated four reports for power users to review. Two still contain last fiscal quarter ID prompt but are improved on performance, the other two removed the prompt but sacrifice some performance. Power users should send in their opinions by the COB Wednesday.
 6/17/02 (T.Liu): No feedback from users. Migrated to production on Sunday.

ID: 382 - Problem with Part II/Part V Disbursement Comparison

Request	Bug Fix	Priority	Medium	Assigned	Mark Mandrella
Open Date:	5/1/2002 2:00:00 PM	Requestor	John Jebian		
Target Date:		Estimated Effort	0		
Closed	6/2/2002 1:00:00 PM	ApplicationType:	FP DataMart		

Description

Some time last year, I sent an email stating that there was a problem with the Part II/Part V Disbursement Comparison report on Data Mart. For some reason, FI loans were incorrectly included in the comparison. I know that there was some discussion when I first sent the email, but nothing was ever corrected. With reviews starting to take place, several reviewers have approached me to report the error. Can this be fixed before we train the GAs in July?

Resolution:

Activity

5/1/02 (Mark M): we do not have a record of this SIR being reported last year (as stated by John).

5/3/02 3:00pm (Mark M): placed the new version of the report with the fixes on the development site and emailed John Jebian about it. I asked him to verify the changes are OK so we can migrate the report to production.



Task Order 110 – FP Data Mart Operations

5/13/02 10:30am (Mark M): emailed John again to remind him to verify the corrected report is indeed correct and can be moved to production.

5/14/02 (Mark M): John approved changes and will be put in production on 6/2 CR #14

ID: 443 - Correct/add parent Lender name, city and state information

Request	Enhancement	Priority	Medium	Assigned	Tina Liu
Open Date:	6/3/2002 9:33:00 AM	Requestor	Nettie Harding		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

This SIR is related to SIR 291. We need to use the table sent by Nettie to add/correct parent lender name, city and state information so that they can be used for SIR 291-related reports.

Resolution:

Activity

6/25/02 (T.Liu): Parent names have been corrected. Need more work on city and state information.

ID: 451 - Reset Robert Bridgman's password

Request	Help Desk	Priority	High	Assigned	Mark Mandrella
Open Date:	6/5/2002 2:00:00 PM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	6/5/2002 2:10:00 PM	ApplicationType:	FP DataMart		

Description

Please reset the FPDM production environment access password for:

NAME: Robert Bridgman
 USERID: eprbridgman
 EMAIL: robert.bridgman@ed.gov
 PHONE: 312-886-8749

Resolution:



Task Order 110 – FP Data Mart Operations

Activity

ID: 452 - reset production FPDM access password for Leslie Richards

Request	Help Desk	Priority	Medium	Assigned	Tina Liu
Open Date:	6/10/2002 9:49:00 AM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	6/11/2002 10:01:00 AM	ApplicationType:	FP DataMart		

Description

Please reset the production FPDM access password for:

NAME: Leslie Richards
 USERID: eplrichards
 PHONE: 415-556-4108
 EMAIL: leslie.richards@ed.gov

Resolution:

done.

Activity

6/10/02 (T.Liu): opened the SIR and checked current status of this user. Her password will not expire in 71 days, called Willie to verify that we still need to reset her password. Left a message for Willie. Got reply from Willie saying that she forgot her password. Reset it and called her again. Sent her email with URL to data mart project.

ID: 455 - Reset Susan Haenel-Beck's Password

Request	Help Desk	Priority	High	Assigned	Mark Mandrella
Open Date:	6/10/2002 2:00:00 PM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	6/10/2002 8:45:00 AM	ApplicationType:	FP DataMart		

Description

Please reset the production FPDM access password for:

NAME: Susan Haenel-Beck
 USERID: epshaenel
 PHONE: 212-637-6430
 EMAIL: susan.haenel-beck@ed.gov

Resolution:

Activity



Task Order 110 – FP Data Mart Operations

ID: 456 - Automated Report to check for GA Access Violation

Request Enhancement **Priority** Medium **Assigned** Tina Liu
Open Date: 6/17/2002 4:07:00 PM **Requestor** Ahmad Usmani
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

Schedule an automated report that will indicate if GA user access (GA users can see only their own GA's data) has been broken. The report should run at least once a week, possibly every day. Use Microstrategy alert feature if it is available in the next release.

Resolution:

Activity

ID: 459 - User gets server error when trying to subscribe to a report

Request Prod. Support **Priority** High **Assigned** Tina Liu
Open Date: 6/18/2002 3:04:00 PM **Requestor** Ben Chiu
Target Date: **Estimated Effort** 0
Closed 6/18/2002 3:05:00 PM **ApplicationType:**FP DataMart

Description

Ben Chiu send in an email:

Is the subscription option in the fp datamart working? I get a server error every time I try to subscribe to a report in production.

Resolution:

Assign everyone "view" right to the schedule "Daily early morning schedule". Remove everyone "custom" permission for "Stress Test" schedule (because it should not be viewable by normal users).

Activity

ID: 460 - Reset Bradley Mayer' Password

Request Help Desk **Priority** High **Assigned** Mark Mandrella
Open Date: 6/18/2002 3:15:00 PM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 6/18/2002 3:00:00 PM **ApplicationType:**FP DataMart

Description



Task Order 110 – FP Data Mart Operations

Please reset the production FPDM Data Mart for:

NAME: Bradley Mayer
 USERID: enbmayer
 PHONE: 202-377-4293
 EMAIL: bradley.mayer@ed.gov

Resolution:

Activity

ID: 461 - Create user account for Johan

Request	Help Desk	Priority	High	Assigned	Tina Liu
Open Date:	6/21/2002 3:33:00 PM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	6/24/2002 8:30:00 AM	ApplicationType:	FP DataMart		

Description

Please establish a user account to access the Financial Partners (Test 5_9_02) project in the development environment for:

NAME: Johan Bos-Beijer
 USERID: epjbosbeijer
 PHONE: 202-377-3302
 EMAIL: johan.bosbeijer@ed.giv
 DESCRIPTION: Deputy GM FPC, UCP 11th Floor

Resolution:

Done.

Activity

6/21/2002 (T.Liu): Created two user ID for Johan, one for accessing dummy lender data only, one for accessing dummy GA data only. Called and emailed Johan. Waiting for reply.

ID: 463 - Reset Paul Sullivan's Password

Request	Help Desk	Priority	High	Assigned	
Open Date:	6/26/2002 4:00:00 PM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	6/26/2002 4:30:00 PM	ApplicationType:	FP DataMart		

Description

Please reset the production FPDM access password for:

USER: Paul Sullivan



Task Order 110 – FP Data Mart Operations

USERID: eppsullivan
PHONE: 617-223-9340
EMAIL: paul.sullivan@ed.gov

Resolution:

Activity

ID: 464 - Add "s" to Report Titles

Request Bug Fix **Priority** Low **Assigned** Tina Liu
Open Date: 6/27/2002 5:29:00 PM **Requestor** Ahmad Usmani
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

Change the following report names:

From: GA Closed School and False Certification Claim
To: GA Closed School and False Certification Claims

From: GA Subrogated Loan Candidate
To: GA Subrogated Loan Candidates

Resolution:

Activity