

***Task Order 53 - OCTS Operations and Support***

---

**Task Order 53 – Ombudsman Case  
Tracking System (OCTS 2.0)  
Operations and Support**

**OCTS 2.1 Transition Report  
Deliverable 53.3.1**

Period Ending: 9/30/01



## ***Task Order 53 - OCTS Operations and Support***

---

### **Introduction**

This is the final deliverable of Task Order 53, Ombudsman Case Tracking System Operations and Support. The responsibility for operations and support has been successfully transitioned to the new support contractor, ROH. This document provides a checklist of transition tasks that were completed, lessons learned and two updated technical documents.

## Task Order 53 - OCTS Operations and Support

### Transition Checklist

The following is a high level checklist of the transition tasks. The general approach was a two step process. In the first step, the Accenture team would provide training and knowledge transfer while the ROH person observed. In the second step, an Accenture person observed as the ROH person performed the task.

OMBUDSMAN TRANSITION CHECKLIST						
	ROH	Accenture	Observed	Performed	Comments	
<b>1) Siebel Related Software and Hardware Installation</b>						
* Configured SFA Workstation with access to EdLan	Ashwin	Mark	27-Aug	29-Aug	Mark installed s/w on the Ed machine	
* Siebel Tools	Ashwin	Jon	27-Aug	20-Sep	Completed by ROH in stages as connectivity issues were resolved	
* Siebel Client and Connection (Dev)	Ashwin	Jon	27-Aug	20-Sep	"	
* Oracle Client and Connection (Dev)	Ashwin	Jon	27-Aug	20-Sep	"	
<b>2) System Administrator/Oracle DBA</b>						
* Monitor Production system	Allan	Mark	30-Aug	31-Aug	Allan and Ashwin monitored the Siebel Server	
* Review System Usage and Contact Reports	Allie	VDC	N/A	N/A	supported by VDC personnel	
* Review DBA usage	N/A	N/A	N/A	N/A	being removed from the list	
* Monitor selected Siebel tables	Allie	Dorothy	30-Aug			
* Contact VDC	Allie	Dorothy	30-Aug	6-Sep	Allie was the contact info, an introduction meeting is scheduled for next week.	
* Backup, Recovery, Restart	Ashwin	Jon	24-Aug	28-Aug	supported by VDC personnel, observed a full database restore	
* Documentation Review	Allie	Dorothy	30-Aug	30-Aug	All documents provided to Ashwin and Allie	
* Data Replication / Recover	Allie	Dorothy	30-Aug		Provided SQL scripts to Allie	
* New Database User	Allie	Dorothy	30-Aug	30-Aug		
* Grant User Roles	Allie	Dorothy	30-Aug	30-Aug		
* Grant User Connection	Allie	Dorothy	30-Aug	30-Aug		
<b>3) Siebel Administrator/Help Desk</b>						
* Install Thin Client Software	Allan/Ashwin	Mark	28-Aug	29-Aug		
* Install Dedicated Client Software	Allan/Ashwin	Mark	28-Aug	29-Aug		
* Add New Users to Ombudsman login	Allan/Ashwin	Mark	28-Aug	30-Aug	The script has been provided and performed by ROH	
* Add New Positions	Allan/Ashwin	Mark	28-Aug	29-Aug	supported by Joyce	
* Add New responsibilities	Allan/Ashwin	Mark	28-Aug	29-Aug	supported by Joyce	
* Update Pick lists	Allan/Ashwin	Mark	28-Aug	29-Aug	supported by Joyce	
* Contact Siebel Technical Assistance	Ashwin	Jon	29-Aug	21-Sep	Shared Accenture access until Read-only id on 9/17, Full id on 9/21	
* Communicate with End Users on Help Desk Requests	Allan	Mark	30-Aug	15-Sep		
* Research/Resolve End User Problems	Allan	Mark	30-Aug	15-Sep		
* Documentation Review	Allan	Mark	30-Aug	19-Sep	Delayed due to Mark's illness	
<b>4) Maintenance/Developer</b>						
* Make System changes	Ashwin	Jon	28-Aug	8/28-8/31		
* Make Application changes	Ashwin	Jon	28-Aug	8/28-8/31		
* Restore Test data	Ashwin	Jon	28-Aug	8/28-8/31		
* Documentation Review	Ashwin	Jon	28-Aug	31-Aug	Question list has been answered	
<b>To Dos</b>						
Get SADMIN Passwords	Ron	N/A		20-Sep	Need support from SFA and VDC	
Resolve VPN issue	Ron	N/A		20-Sep	Need support from SFA and VDC	
Get SFA machine over to ROH	Ron	N/A		20-Sep	Need support from SFA and VDC	
Establish VDC Call list	Ron	Bob		30-Aug		

## ***Task Order 53 - OCTS Operations and Support***

---

### **Lessons Learned**

Several lessons were learned during this transition that should be applied in the future as other modernization systems are moved to long-term operations.

**System Access** – The most difficult part of the transition was acquiring user ids, system access and hardware connectivity to SFA systems for the ROH personnel. A joint team from SFA, the old contractor, the new contractor and the VDC should meet regularly on this topic until everything is completed. This needs to begin early in the transition and driven to completion with a high level of energy.

**Contract Overlap** – It was found that some contract overlap was key to a smooth transition. The main knowledge transfer occurred during the month of August and then ROH took over operations responsibility on September 1<sup>st</sup>. Accenture's Transition contract continued for the month of September. This proved to be valuable because as ROH assumed day-to-day responsibilities, new questions and need for assistance arose – and they still had access to the old team to get that assistance. The level of interaction was high at the beginning of the month and tailed off by the end of September. This overlap eliminated many of the risks inherit in a transition activity.

**Shadowing** – The ROH team shadowed the Accenture team during the move to production of the final enhancement code release. The ROH team learned a great deal during this exercise that would have been hard to recreate in the transition meetings or documentation reviews. Shadowing by the new contractor should be a part of any transition task. This is where the greatest learning occurred.

**Planning for Transition:** The transition process requires additional resources from the incumbent contractor to support knowledge transfer while at the same time continuing to provide normal support. For OCTS, Accenture needed to bring in additional resources who worked on the original development effort and others with deep Siebel skills. There was also a need for additional management resources to coordinate the efforts and communication with ROH. This level of effort should be planned into every task order.

## ***Task Order 53 - OCTS Operations and Support***

---

### **Updated Documentation**

There are two technical documents that have been updated as a result of the transition activities:

- Migration Procedure Development to Production
- Ombudsman Siebel Environment Report

These documents are included as attachments to the deliverable.