



accenture

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

**OCTS 2.1 Enhancement Report
Deliverable 53.2.2**

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Introduction

Now that the OCTS 2 system has been in production for several months, the Ombudsman Specialists have defined some new requirements that will improve the workflow and ease of use. There are three specific enhancements that are included in this proposal:

- Round Robin Case Assignment (Help Desk Request #54)
- Activity Comment Field extension (Help Desk Request #64)
- Email Field extension (Help Desk Request #65)

The scope of the enhancement task included the design, development, testing, deployment and documentation related to implementing these three enhancements.

Several other system changes were deployed concurrently with the enhancements:

- Siebel Randomly Attaching Unrelated Case Docs to Emails (Help Desk Request #32)
- Cases are exceeding 25 maximum case limit (Help Desk Request #50)
- Pop-up Box does not give option to delete case (Help Desk Request #58)

The changes were all deployed to the OCTS Production system on August 28, 2001. Users were on-line at normal hours on August 29th and did not report any issues. The planned delivery date was August 17 but technical issues associated with the Development Environment and the migration process caused a schedule delay.

The sections below document

- Resolution to the six Requests
- Development Environment fixes
- Test results of the Random Case Assignment

Other lessons learned during the deployment process will be delivered as part of the Transition Report, deliverable 53.3.1.

Resolution of Help Desk Requests

Request 50 & 54– Cases exceeding the 25 maximum limit/Round Robin Case Assignment

Resolution: Changes were made to the assignment rules. The Workload 25 rule was changed to Workload 30, increasing the maximum workload of the agents to 30. A new rule was created called Assign by Other Servicing Agency –1, which assigns a case if the Servicing Agency <> “DCS”, “DL”, or “Unknown”. The rule was changed to remove subtype of “Assigned”, so that it counts all “Open” Cases.

A true Round Robin Case assignment rule would have required significant custom VB coding. Alternatively, Siebel provides an out-of-the-box option for performing “random” case assignments. The effectiveness of this technique was tested under twelve scenarios. Based on this testing, it was determined that the Siebel option would provide the desired results and

avoid the need for custom coding. The results of this testing are listed at the end of this document.

Request 64 & 65 – Activity Comment Field is too small/Email Field too small (same field)

Resolution: A column named X_COMMENTS_LONG of type Long was added to the S_EVT_ACT_X table. At the business component level, the comments field was redirected at this column. The data in the previous COMMENTS column was copied to the X_COMMENTS_LONG column. The number of characters allowed for entry into that column had to be limited to 10,000 characters because this field is combined with the other fields on an email and stored in the Parameter Field on the Server Request table. Adding a VB script to the PreWriteRecord Method on the Action Business Component did the character limitation. The description “Limited to 10,000 characters” was added to the field label of all applets containing the field.

Request 32 – Siebel Randomly Attaching Unrelated Case Docs to Emails

Resolution: Separate Email managers were created for email created by the user and email created by workflow. Email created by the user now has a Request Key of 1; this was added by setting the pre default value to 1 on the Request Key field on the Server Request Business component. A request key of 2 was added to each Email Workflow Action through the Workflow Administration – Actions Screen. This resolution was provided by Siebel as a work-around to a known product defect.

Request 58 – Pop-up Box does not give the option to delete a case

Resolution: The No Delete property on the Service Request Business Component was disabled. To avoid accidental deletion of Cases, the delete button was removed from the applets.

Ombudsman Development Environment Fixes

Transaction Processor

The transaction processor was still pointing to the development environment. Because of this problem a local database could not be extracted for the developers to complete their work locally. Since the department of Education does not have remote clients the license key for Siebel Remote was not purchased. The screen to expire and recreate the transaction processor is part of the Siebel Remote license. A representative from Siebel came to the client site and added a key that would unlock that screen, Siebel Remote Administration – Processor Status. The Transaction Processor was expired and the license key was removed. It was then possible to add new mobile clients and extract their local databases.

Siebel 5.6.0.14 Patch

The Gateway Server and Siebel Server in the Development and Testing environments did not have the correct patch applied to them. The Production environment uses the 5.6.0.14 to correct firewall issues. The correct patch had to be received from Siebel and applied to both environments.

Siebel Database Server

The Siebel database server was not installed in the Development or Testing environments. The scripts to migrate repositories and schemas between environments are in the db server. The database server was installed in the development and testing environments under the ss_dev\dbsrvr and ss_tst\dbsrvr directories respectively.

Siebel Email Agent

The standalone Siebel Email agent had to be installed in the Development and Testing environments, along with the appropriate patch. These two environments are on the same NT server so the same standalone agent can be used for both environments. In order for the Email Agent to work, the Oracle 8.0.5 client must be installed on the server because the Email Agent uses Oracle 7.3.4 drivers and 8.0.5 is backwards compatible. The current Oracle client was uninstalled and replaced by the correct one. A reference was added to sscdo73.dll for the dll parameter under the server heading in the magent.cfg file. All of the enhancements to the email system are outlined in the Summary of OCTS 2.0 E-mail and Workflow Enhancements document.



Random Case Assignment Test Results

- Tests # 1-5 Tests random assignment
Tests # 6-10 Tests random assignment, and max 30 workload
Tests #11-12 Tests random assignment, max 30 workload, and overflow to Manager (Thad)

Test # 1

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	14	17	3
ECRISP	8	12	4
SCURRIE	20	22	2
AGRAHAM	3	6	3
MJACOBS	10	11	1
CJESSE	11	16	5
MJOHNSON	15	21	6
LMCFADDEN	0	3	3
LMEYER	0	5	5
GROZIER	15	16	1
JSISILIJA	5	8	3
KSTONE	10	13	3
BWALL	3	9	6
BWRIGHT	10	12	2

Test # 2

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	14	22	8
ECRISP	8	10	2
SCURRIE	20	22	2
AGRAHAM	3	4	1
MJACOBS	10	15	5
CJESSE	11	16	5
MJOHNSON	15	19	4
LMCFADDEN	0	3	3
LMEYER	0	6	6
GROZIER	15	17	2
JSISILIJA	5	8	3
KSTONE	10	11	1
BWALL	3	5	2
BWRIGHT	10	13	3

Test # 3

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	14	16	2
ECRISP	8	14	6
SCURRIE	20	22	2
AGRAHAM	3	8	5
MJACOBS	10	11	1
CJESSE	11	13	2
MJOHNSON	15	20	5
LMCFADDEN	0	5	5
LMEYER	0	4	4
GROZIER	15	18	3
JSISILIJA	5	6	1
KSTONE	10	13	3
BWALL	3	7	4
BWRIGHT	10	14	4

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Test # 4

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	14	16	2
ECRISP	8	11	3
SCURRIE	20	28	8
AGRAHAM	3	6	3
MJACOBS	10	13	3
CJESSE	11	15	4
MJOHNSON	15	19	4
LMCFADDEN	0	3	3
LMEYER	0	2	2
GROZIER	15	19	4
JSISILIJIA	5	10	5
KSTONE	10	12	2
BWALL	3	6	3
BWRIGHT	10	11	1

Test # 5

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	14	16	2
ECRISP	8	10	2
SCURRIE	20	23	3
AGRAHAM	3	6	3
MJACOBS	10	16	6
CJESSE	11	17	6
MJOHNSON	15	17	2
LMCFADDEN	0	2	2
LMEYER	0	1	1
GROZIER	15	18	3
JSISILIJIA	5	6	1
KSTONE	10	17	7
BWALL	3	8	5
BWRIGHT	10	14	4

Test # 6

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	28	29	1
ECRISP	28	30	2
SCURRIE	28	30	2
AGRAHAM	28	30	2
MJACOBS	28	30	2
CJESSE	28	29	1
MJOHNSON	28	30	2
LMCFADDEN	0	5	5
LMEYER	0	6	6
GROZIER	15	21	6
JSISILIJIA	5	9	4
KSTONE	10	13	3
BWALL	3	7	4
BWRIGHT	10	17	7

Test # 7

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	28	30	2
ECRISP	28	30	2
SCURRIE	28	30	2
AGRAHAM	28	30	2
MJACOBS	28	30	2
CJESSE	28	30	2
MJOHNSON	28	30	2
LMCFADDEN	0	5	5
LMEYER	0	4	4
GROZIER	15	20	5
JSISILIJIA	5	12	7
KSTONE	10	13	3
BWALL	3	5	2
BWRIGHT	10	17	7

Test # 8

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	30	30	0
ECRISP	30	30	0
SCURRIE	30	30	0
AGRAHAM	30	30	0
MJACOBS	30	30	0
CJESSE	30	30	0
MJOHNSON	30	30	0
LMCFADDEN	0	7	7
LMEYER	0	11	11
GROZIER	15	19	4
JSISILIJIA	5	11	6
KSTONE	10	18	8
BWALL	3	9	6
BWRIGHT	10	15	5

Test # 9

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	30	30	0
ECRISP	30	30	0
SCURRIE	30	30	0
AGRAHAM	30	30	0
MJACOBS	30	30	0
CJESSE	30	30	0
MJOHNSON	30	30	0
LMCFADDEN	0	6	6
LMEYER	0	12	12
GROZIER	15	21	6
JSISILIJIA	5	14	9
KSTONE	10	14	4
BWALL	3	6	3
BWRIGHT	10	17	7

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Test # 10

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	30	30	0
ECRISP	30	30	0
SCURRIE	30	30	0
AGRAHAM	30	30	0
MJACOBS	30	30	0
CJESSE	30	30	0
MJOHNSON	30	30	0
LMCFADDEN	0	10	10
LMEYER	0	4	4
GROZIER	15	23	8
JSISILIJA	5	12	7
KSTONE	10	13	3
BWALL	3	11	8
BWRIGHT	10	17	7

Test # 11

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	28	30	2
ECRISP	28	30	2
SCURRIE	28	30	2
AGRAHAM	28	30	2
MJACOBS	28	30	2
CJESSE	28	30	2
MJOHNSON	28	30	2
LMCFADDEN	28	30	2
LMEYER	28	30	2
GROZIER	28	30	2
JSISILIJA	28	30	2
KSTONE	28	30	2
BWALL	28	30	2
BWRIGHT	28	30	2
TBARTKOWIAK	0	19	19

Test # 12

LOGIN	Pre-batch	Post-Batch (47 cases)	Variance
PCRISP	26	30	4
ECRISP	28	30	2
SCURRIE	28	30	2
AGRAHAM	28	30	2
MJACOBS	28	30	2
CJESSE	28	30	2
MJOHNSON	28	30	2
LMCFADDEN	27	30	3
LMEYER	27	30	3
GROZIER	28	30	2
JSISILIJA	28	30	2
KSTONE	28	30	2
BWALL	28	30	2
BWRIGHT	28	30	2
TBARTKOWIAK	0	15	15