

Summary of OCTS 2.0 E-mail and Workflow Enhancements

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Reference

This Summary of OCTS 2.0 E-mail and Workflow Enhancements is Deliverable #53.1.1 as outlined in Task Order #53 – Ombudsman Case Tracking System (OCTS) 2.0 Operations and Support.

Introduction

E-mail and workflow enhancements have been configured to the Ombudsman Case Tracking System (OCTS) 2.0 that was migrated into Production on 10/30/2000. These enhancements enable the Ombudsman Specialists to receive and send e-mail messages from the OCTS 2.0 Siebel application to communicate with the customers regarding their cases with the Office of the Ombudsman. As a result of the new e-mail functionality, workflow functionality was also enhanced to adjust the internal processing of OCTS 2.0.

E-mail Notification

The Ombudsman Specialist will be notified via e-mail when a case is assigned to him/her. The e-mail message will be displayed as follows:

E-mail Subject: A message from the OCTS 2.0 Assignment Manager

E-mail Message: Hello!

A new case has been assigned to you. The case was received on [Created]. The case number is [Case Num], and the customer name is [Contact First Name] [Contact Last Name].

Please contact the customer within 48 hours of the date the case was received.

Thank you!

Outbound E-mail Associated With A Case

To send outbound e-mails, a new mailbox called osfaombudsman@ed.gov is used to deliver these e-mails. All out bound e-mail activities will have an activity type of 'E-mail - Outbound'. A new view called 'All E-mail Activities' has been added to the Cases Screen and will be visible to all Intake Specialists and Ombudsman Specialists. In order to initiate an outbound e-mail, go to the Cases screen, All E-mail Activities View, and select the 'New E-mail' button. This will create a new activity that will be used to both record the e-mail and to send the e-mail at the same time.

The activity type field will default to 'E-mail Outbound.' The 'Subject' field should be used as the subject line for the e-mail. The subject should include the case number. The 'Comment' line should include the e-mail body. At this time, e-mails associated with a case are restricted to outbound only. Therefore, it's important that all outbound e-mails include text that directs the customer to send his/her reply back to the sfaombudsmanoffice@ed.gov mailbox. The 'To' line should be used to enter the e-mail address of the customer. The status field will default to 'Not Started' when the activity is added.

Click on the 'Send' button to send the e-mail. After clicking 'Send,' the status will change to 'In-Progress,' and the planned completion date will be populated with the current date and time. Before Siebel actually submits your e-mail to the mail server, it will check the 'To' line for proper syntax. The syntax check is as follows:

- The 'To' line must be populated
- Some text must proceed the '@' sign
- Some text must follow the '@' sign
- Followed by a '.'
- Followed more text

If the e-mail request fails the syntax check, the status will be changed to 'Cancelled.' If this happens, the owner of the activity will receive an e-mail notifying them that the e-mail did not go out. That message will appear as follows:

E-mail Subject: A message from the OCTS 2.0 E-mail Manager

E-mail Message: Hello!

The E-mail Manager was not able to complete your outbound e-mail request for case [Case Id] created on [Created Date]. The subject line for this e-mail is '[Subject]'. Please verify that the e-mail 'To' line contains a complete e-mail address, and resend the e-mail.

Thank you!

If the e-mail passes the syntax check, the message will be mailed and the status changed to 'Done.'

Inbound E-mail Functionality - Undeliverable Mail

It is possible that an e-mail that has a 'Done' activity status won't get successfully sent to the customer in a situation where the syntax of the mailbox address is correct but the mailbox just doesn't exist. In this case the poster master on the target e-mail system will send the osfaombudsman mailbox an e-mail indicating it couldn't deliver the e-mail. If this notification has the following words in the beginning of the subject line:

- Undeliver%
- Returned mail%

The system will automatically load the e-mail into Siebel as an activity. This activity will be assigned to Joyce. The activity type will be loaded as 'E-mail Agent – Inbound.' The system will also send Joyce an e-mail letting her know that there is some undeliverable e-mail. The message is as follows:

E-mail Subject: This is the subject line of the original inbound e-mail.
For example:

Undelivered Mail Returned to Sender
Accordingly, the message will be different depending on the postmaster that is replying to the mail.

E-mail Message: Outlook was not able to complete the outbound e-mail request. Please reassign this activity to the ombudsman for this case. The ombudsman should verify the e-mail address before resending.

Thank you!

Since there is no way to tell how a post master is going to respond to an invalid e-mail address, there is no way to ensure that all undeliverable e-mail activities are properly assigned. Therefore, Stephanie and Sharita will need to assign these activities to Joyce. Please note that Stephanie and Sharita will be monitoring incoming activities. They will need to assign all other undeliverable activities to Joyce for further action.

Inbound E-mail Functionality - Web Case Origination

All activities generated by the E-mail Agent will have an activity type of 'E-mail Agent – Inbound.' Any inbound e-mail received in the osfaombudsman@ed.gov mailbox will automatically be added to Siebel as an activity.

These activities will not be assigned to anyone. Sharita and Stephanie will have a query that looks for activities where the 'Assigned To' field is null, the activity type = 'E-mail – Inbound.' They will review this e-mail to determine whether or not a new case should be added. Upon adding a new case, they will need to come back to the original activity and associate it with the new case number, change the status to 'Done' and enter the appropriate start and completion date information. Since Sharita or Stephanie may need to refer to the e-mail related fields, a new Responsibility has been created that allows Sharita, Stephanie and Joyce to see the 'All E-mail Activities' view from the Activities Screen. It will be the new Responsibility Ombudsman E-mail.

Inbound E-mail Workflow Functionality

Any inbound e-mail that reaches the osfaombudsman@ed.gov mailbox will result in an activity being generated. This means that new activities must be monitored and subsequently assigned. A new workflow was created to help with monitoring these new activities. The workflow will send an e-mail to Joyce when there is an activity generated via the E-mail Agent that

- has no case number associated with it
- where the activity has been left unassigned for an hour or more

New Inbound E-mail Notification

E-mail agent functionality will also ensure that inbound e-mail requests are parsed in an attempt to associate inbound e-mail with a service request. This enhancement means that users can respond to the osfaombudsman@ed.gov mailbox. To accomplish this, Visual Basic (VB) was added to the Mail Agent Activity business component.

The VB looks at the e-mail subject line searching for the word ‘case.’ It then looks for the word that follows the word ‘case.’ It searches the Siebel database to see if it can find a case with this same number. If it can, it updates the activity to include the appropriate Case Number as well as the activity owner. The activity owner will always be assigned to whomever owns the case.

If the VB can not find the word ‘case’ or can not find a case associated with the case number, an activity is still added to the database but it will not be associated with a service request nor will it be assigned to anybody. Please note that Siebel will not know how to associate an inbound e-mail to a case *unless* the word ‘case’ followed by case number are in the subject of the e-mail. Examples of subject lines where the activity would successfully be associated with a case are as follows:

Subj: Regarding Case 1-129Z
Subj: An Update on case 1-34ZF
Subj: Case 1-29ZF: a status update

Examples of subject lines where the activity *would not* successfully be associated with a case are as follows:

Subj: Case #1-9087
Subj: Regarding Case 4807
Subj: Regarding Case-1-90FZ

When an inbound e-mail activity is received and that inbound e-mail is successfully associated with a case and assigned to the case owner, Siebel will send an e-mail out to the owner of the new activity.

Technical Implementation Information

Projects Modified

- Service (SSV)
- Mail Agent
- Activity (SSE)
- Activity (SSV)
- Assignment (FS)
- Workflow Manager
- Activity

New View Names

- OCTS Case Activity List View – E-mail
- Activity List View – E-mail – Only Joyce, Sharita and Stephanie will have access to this view. This is because only these three people will be dealing with inbound e-mail functionality. A new responsibility called ‘Ombudsman E-mail’ was created to limit who sees this view.

Business Component Modifications

- Action
- Mail Agent Activity
- Service Request

The major change to the Service Request Business Component was to move the My E-mail Activities view from Activities to Service Request. A view to show all activities rather than just those that belong to the person logged in was also modified. The Mail Agent Activity Business Component field default values and the column pointed to by the ‘Comments’ field were both changed. Minimal VB to the action business component was added in order to update two fields.

New Workflow Actions

| <i>Action Name</i> | <i>Program Name</i> | <i>Description</i> |
|--------------------------------------|----------------------------|---|
| Cancelled E-mail Agent Notification | Send E-mail Activity Reply | Send e-mail to the owner of an E-mail Outbound activity where the status is cancelled because the ‘To’ line did not pass the E-mail Agent syntax check. |
| Return E-mail Activity Assignment Id | Change Activity Owner Id | Assign Undeliverable Inbound E-mail to Joyce |
| Return E-mail E-mail Notification | Send E-mail Activity Reply | Send Joyce an e-mail when she is assigned Undeliverable E-mails. |

| <i>Action Name</i> | <i>Program Name</i> | <i>Description</i> |
|---------------------------------|----------------------------|---|
| E-mail on Case Assignment | Send SR E-mail | Send an e-mail to the ombudsman on case assignment. E-mail should be sent when the case is added or if the owner of the case is changed. |
| Unassigned Activity w/ No SR Id | Send E-mail Activity Reply | Send an e-mail to Joyce if there are inbound e-mail agent activities in the database with no associated Case that have been left unassigned for 1 hour or more. |
| New Inbound E-mail Notification | Send E-mail Activity Reply | Send the Ombudsman Specialist e-mail to let them know they have received some inbound e-mails. |

New Workflow Rules

| <i>Rule Name</i> | <i>Associated Workflow Action</i> | <i>Notes</i> |
|-------------------------------------|---|---|
| Cancelled E-mail Agent Notification | Cancelled E-mail Agent Notification | |
| Return E-mail Activity Assignment 1 | Return E-mail Activity Assignment Id Return E-mail E-mail Notification | Used to assign new inbound e-mail activities with a subject line where the first word starts with 'Undeliver%'. |
| Return E-mail Activity Assignment 2 | Return E-mail Activity Assignment Id Return E-mail E-mail Notification | Used to assign new inbound e-mail activities with a subject line where the first word starts with 'Return mail%'. |
| Return E-mail E-mail Notification | Return E-mail E-mail Notification | |
| E-mail on Case Assignment | E-mail on Case Assignment | |
| Unassigned Activity w/ No SR Id | Unassigned Activity w/ No SR Id | Used to send an e-mail to Joyce where the activity type = 'E-mail Agent – Inbound', the case field is NULL and the activity owner is NULL |
| New Inbound E-mail Notification | New Inbound E-mail Notification | |

New Server Administration Processes

Two new server component definitions for this new e-mail related workflow were created. This was done largely because the parameters are a little different from the parameters for our already existing workflow and assignment manager jobs. The component parameters on the E-mail Manager and the E-mail Agent were also modified. All four component definitions should automatically restart when the Siebel Server is started. All of these components must be up and running in order to send/receive e-mails and assign the jobs properly.

| <i>Component name</i> | <i>Component Type</i> | <i>Parameter Changes</i> |
|-------------------------------|-----------------------|---|
| Workflow Action Agent – Mail | WorkActn | Default tasks = 1 Action Interval = 2 Group Name = E-mail Group Sleep Time = 180 |
| Workflow Monitor Agent – Mail | WorkMon | Default tasks = 1 Group Name = E-mail Group Sleep Time = 180 Use Action Agent = True |
| E-mail Manager | MailMgr | Default tasks = 1 Mail Profile = SFA |
| E-mail Agent | MailAgent | Default tasks = 1 E-mail Agent Config Dir = d:\magent\bin |

E-mail Manager

E-mail Manager must run for outbound e-mail functionality to work (e-mail generated in the 'All E-mail Activities' view). It's also used to send out e-mail triggered through Siebel Workflow. All requests to run the e-mail manager may be viewed in Application Administration, Server Request Monitor.

E-mail Agent Configuration

E-mail Agent allows for the processing of inbound e-mails. The e-mail manager has been configured to look at the same SRF file as does thin client for simplicity although it doesn't have to be done this way. You may specify which SRF to look at by modifying the d:\sbsrvr\bin\magent.cfg. Please note that we are running E-mail Agent as a server component; therefore, the magent.cfg file must be in the d:\sbsrvr\bin directory rather than the d:\magent\bin directory.

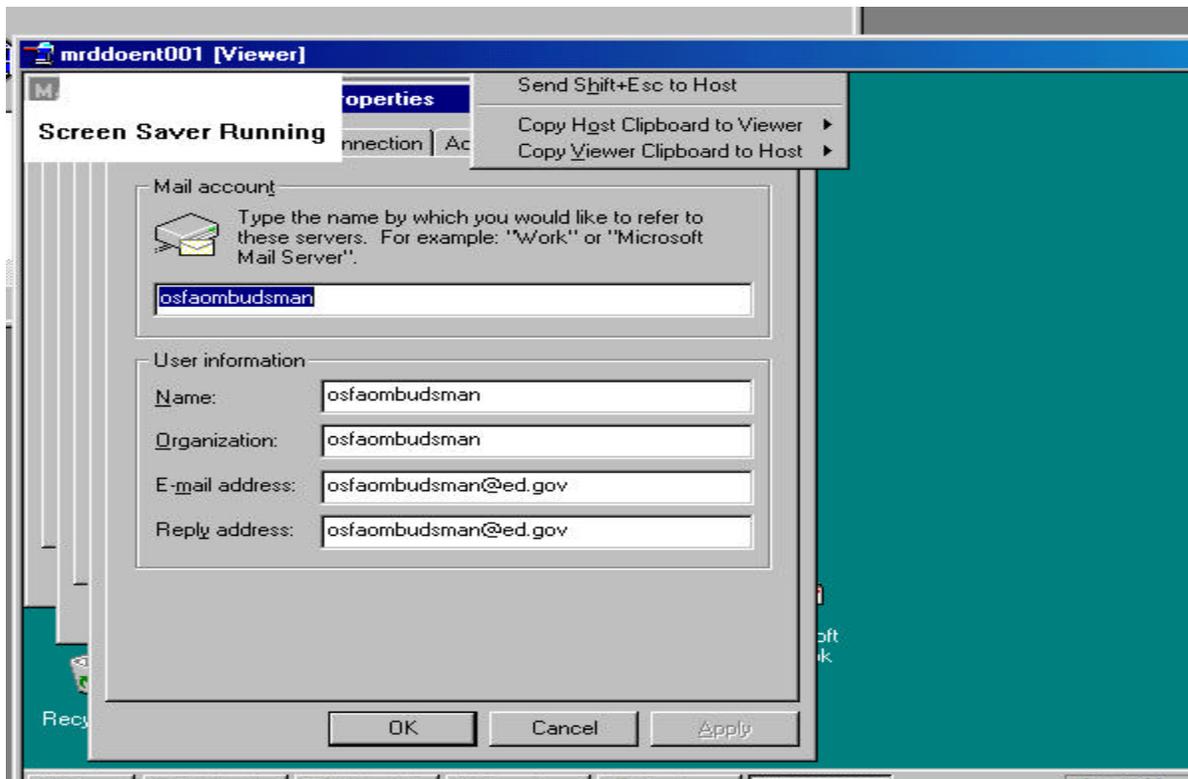
Known Bugs

On undeliverable mail, certain post masters return e-mails with file that the ombudsman@ed.gov mail can't read. This causes the Siebel E-mail Agent to crash. It's still unclear why this is happening. Siebel Support Web can't seem to reproduce the problem. Until a permanent fix is found, the offending e-mail should be deleted from the e-mail box and the E-mail Agent restarted in Server Administration, Server Tasks.

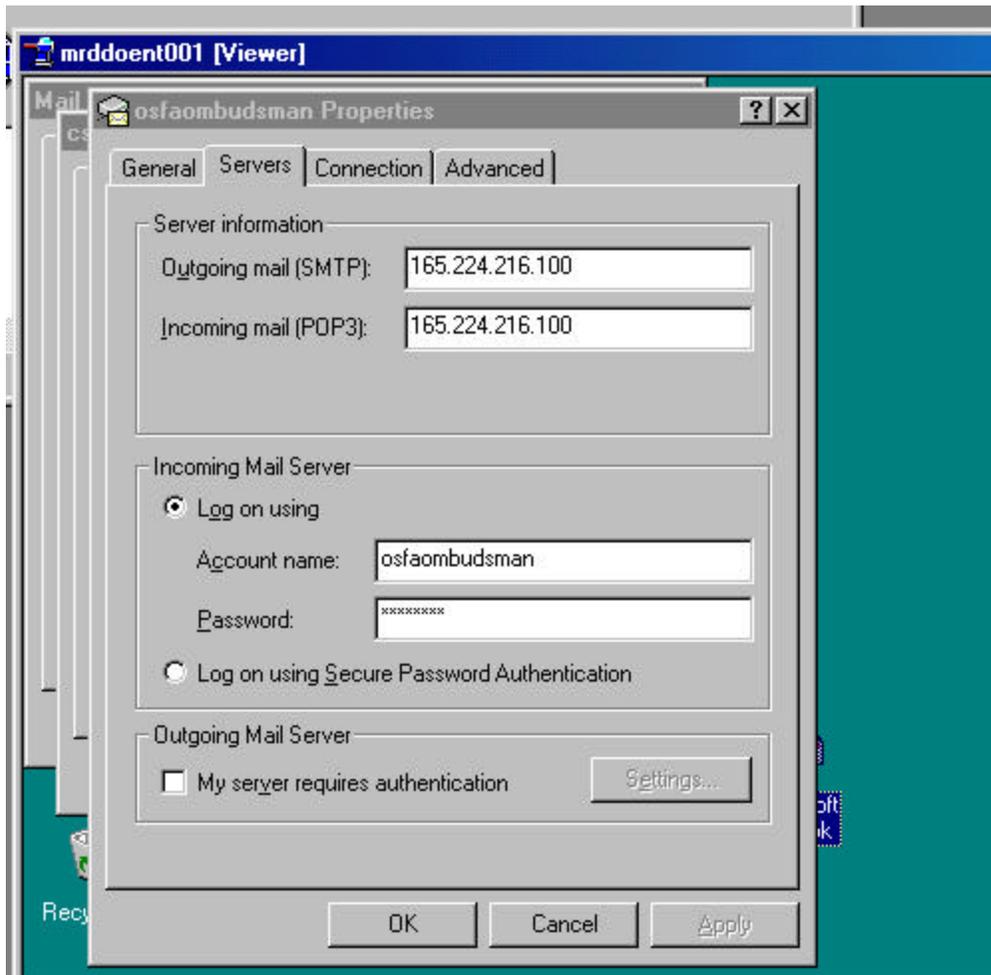
Set Up of E-mail Box on SFANT005

In order to implement E-mail Manager or E-mail Agent, an Outlook client must be set up on the server. The client must have an associated profile. That profile is named 'SFA'. Note that the E-mail Manager and the E-mail Agent both have hard coded pointers to this name so it really can't be changed unless E-mail Manager and Agent are also changed. The MRDDOENT001 machine uses the osfaombudsmantest@ed.gov mailbox. The SFANT005 machine uses the osfaombudsman@ed.gov mailbox.

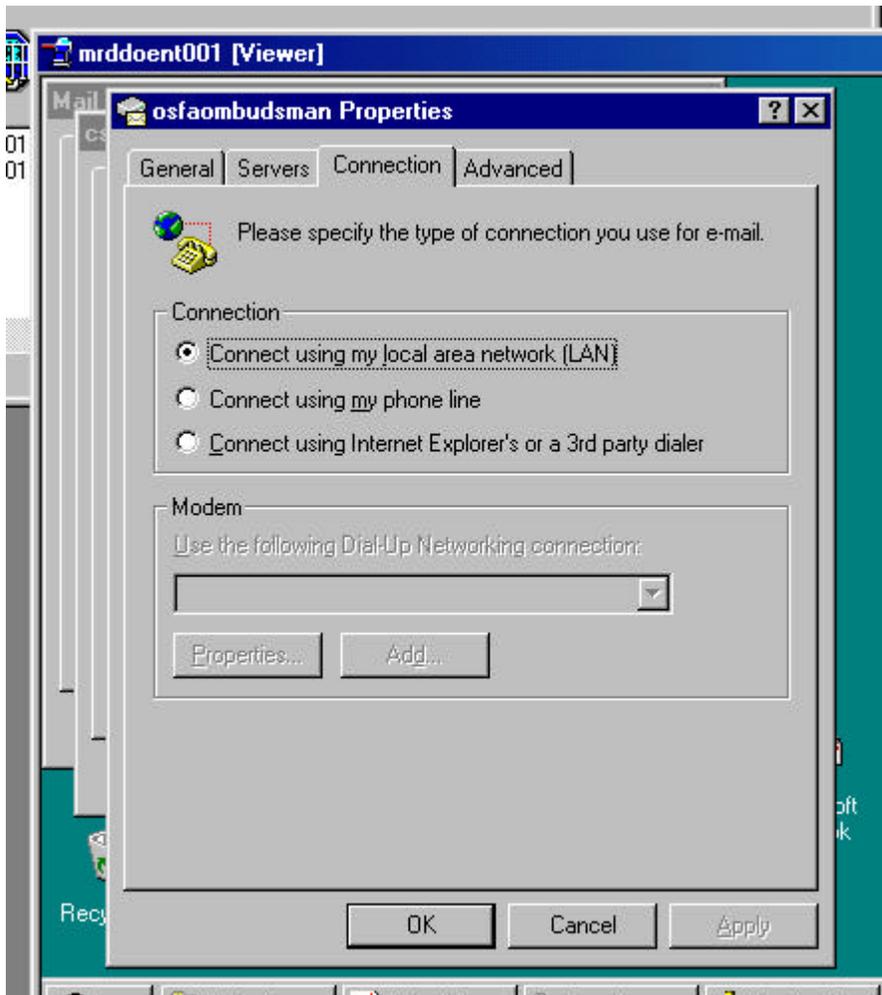
Properties of osfaombudsman – General:



Properties of osfaombudsman – Servers:



Properties of osfaombudsman – Connection:



Properties of osfaombudsman – Advanced:

