

Task Order 75 - Data Mart Operations

Data Mart Operations Monthly SLA Metrics Report **Deliverable 75.1.3a**

Period Ending: 10/31/01





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Introduction

This is the fifth monthly report for Task Order 75 Data Mart Operations. The purpose of this task order is to provide the capability to sustain the CFO and FP Data Marts. The report information will be provided separately for each system.

Data Mart Availability

Date	Availability (%)	Notes
Mon- October 1	100%	
Tues- October 2	100%	
Wed- October 3	100%	
Thurs- October 4	100%	
Fri- October 5	100%	
Sat- October 6	100%	
Sun- October 7	50%	CFO data mart production Oracle instance on HPV2.ED.GOV.CFO went down. VDC rebooted the server on Sunday and the CFO production Oracle instance did not restart on its own.
Mon- October 8	100%	
Tues- October 9	100%	
Wed- October 10	100%	
Thurs- October 11	100%	
Fri- October 12	100%	
Sat- October 13	100%	
Sun- October 14	100%	
Mon- October 15	100%	
Tues- October 16	100%	
Wed- October 17	100%	
Thurs- October 18	100%	
Fri- October 19	100%	
Sat- October 20	100%	
Sun- October 21	100%	
Mon- October 22	100%	
Tues- October 23	100%	
Wed- October 24	100%	
Thurs- October 25	100%	
Fri- October 26	100%	
Sat- October 27	100%	
Sun- October 28	100%	
Mon- October 29	100%	
Tues- October 30	100%	
Wed- October 31	100%	



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CFO Data Mart Operations Status

Work Accomplished During This Period

- Completed documentation for CFO data mart
- Provided daily monitoring of CFO data mart file loads.
- Provided daily monitoring of CFO data mart availability.
- Continued tracking SIRs and production support requests.
- Manually updated the id's, descriptions, and relationships in the CFO data mart.

Issues or Anticipated/Current Problems

- none

Planned Work for Next Period

- Continue Microstrategy reporting enhancements.
- Continue daily monitoring of CFO data mart file loads.
- Continue daily monitoring of CFO data mart availability.
- Continue tracking SIRs and production support requests.
- Begin gathering requirements for automated update process.
- Begin Informatica mapping enhancements for the automated update process.



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Batch Job Results (CFO)

Date Processed	Number of Rows Processed	Notes
Mon - October 1	6540	
Tue - October 2	0	
Wed - October 3	197184	
Thu - October 4	0	
Fri - October 5	94064	
Sat - October 6	0	
Sun - October 7	0	
Mon - October 8	0	
Tue - October - 9	0	Due to Holiday
Wed - October 10	2842	
Thu - October 11	819	
Fri - October 12	4181	
Sat - October 13	0	
Sun - October 14	0	
Mon - October 15	1211	
Tue - October - 16	15732	
Wed - October 17	1088	
Thu - October 18	1980	
Fri - October 19	2868	
Sat - October 20	0	
Sun - October 21	0	
Mon - October 22	1626	
Tue - October - 23	1164	
Wed - October 24	2994	
Thu - October 25	50400	
Fri - October 26	70560	
Sat - October 27	0	
Sun - October 28	0	
Mon - October 29	19158	
Tue - October 30	3200	
Wed - October 31	1808	



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Help Desk Monthly Throughput (CFO)

System Investigation Requests

Category	High	Medium	Low	Total
Carry Forward	2	1	1	4
New	5	0	0	5
Closed	7	1	1	9
End of Month Balance	0	0	0	0

Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	2	0	4	6
New	0	0	0	0
Closed	1	0	2	3
End of Month Balance	1	0	2	3

Help Desk Request Summary (CFO)

Total Records: 15

ID	Status	Request Type	Title	Priority	DateOpened	DateClosed
152	Closed	Enhancement	Need list of Org Codes within report	High	7/20/2001	10/26/01
153	Open	Enhancement	New Monthly Report - Status of Funds Report	Low	7/20/2001	
162	Closed	Prod. Support	CFO data mart Security	Medium	7/25/2001	10/12/01
163	Open	Enhancement	File Layout change	Low	7/25/2001	
192	Closed	Prod. Support	Update the description fields in the dimension tables	High	8/15/2001	10/26/01
194	Open	Enhancement	Automate process of modifying and adding descriptions	High	8/15/2001	
195	Closed	Enhancement	Document the update process for the CFO data mart	Low	8/16/2000	10/26/01
196	Closed	Enhancement	Document table dependencies and descriptions	Low	8/16/2001	10/12/01
215	Closed	Prod. Support	Data Mart Contact List	Low	8/21/2001	10/31/01
249	Closed	Prod. Support	Two files did not load into the CFO Data Mart	High	9/13/2001	10/26/01
264	Closed	Prod. Support	Did not receive the 10/01/01 data file	High	10/2/2001	10/12/01



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ID	Status	Request Type	Title	Priority	DateOpened	DateClosed
266	Closed	Prod. Support	CFO Oracle instance is down	High	10/8/2001	10/8/01
267	Closed	Prod. Support	data from 10/05/2001 did not load into fact tables	High	10/8/2001	10/26/01
268	Closed	Prod. Support	Did not receive extracts from 10/04/01	High	10/8/2001	10/12/01
275	Closed	Prod. Support	User ID and password	High	10/30/2001	10/30/01

Help Desk Request Details (CFO)

Total Records: 15

Total Records: 15

ID: 152 - Need list of Org Codes within report

Request Enhancement **Priority** High **Assigned** Keisha Contee
Open Date: 7/20/2001 10:00:00 AM **Requestor** David Pappone
Target Date: **Estimated Effort** 0
Closed : 10/26/2001 10:00:00 AM **ApplicationType:** CFO DataMart
Description

When I drill to the Channel level, there is a "channel" called SFA. I need to have a list of the org codes that are included in that and they may need to be revised.

Resolution:

Activity

7/25/2001 (David Pappone) The table that maps the org codes to SFA Channels needs to be examined and likely updated. Since the original allocation of the org codes, we have refined our understanding and identified some errors. Also, there have likely been additional org codes added. We need to see a listing of all possible org codes and to which channel each is associated. This is critically necessary for two primary reasons. 1) In order for our plans to match our actuals, we need to have a consistent accounting of which org codes hit against which channels. 2) If there are org codes that haven't been picked up at all the funds may not appear in any of our reports. The failure to accomplish this request in a timely manner would result in the generation and distribution of reports of questionable integrity. As the end of the fiscal year approaches, this is becoming increasingly critical.

08/03/2001 (Keisha Contee) Annie has sent David an excel spreadsheet of the org codes. He will make changes to the spreadsheet and send it back to Annie. The new codes will be loaded via Informatica using the spreadsheet.



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08/27/2001 (Keisha Contee) waiting for test environment

09/26/2001 (Keisha Contee) We have a test environment. I have successfully loaded the Org codes in Test. I have submitted a change request to load them in Production tomorrow.

9/28/2001 (Keisha Contee) I have decided to update and migrate the org codes, channel ids, and descriptions at the same time. The migration could not be performed because I was unable to open the lkp_object.xls file sent by Russell. I sent him an email asking for him to resend the file. The migration will be rescheduled for early next week.

10/12/2001 (Keisha Contee) I put in a change request for Monday at pm.

ID: 153 - New Monthly Report - Status of Funds Report

Request	Enhancement	Priority	Low	Assigned	Mark Mandrella
Open Date:	7/20/2001 10:00:00 AM	Requestor	David Pappone		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	CFO DataMart		

Description

I generate the Status of Funds report for SFA each month based on data mart data. However, with the way the data comes off the data mart, it takes two days for me to put it in the format I need it. I think (using custom groups and consolidations) this report can be made to run itself, thereby saving me days worth of work every month. Jeff was helping me with a report during the last couple days he was here, but we didn't get very far. I need assistance in creating this report.

Resolution:

Activity

7/25/2001 (David Pappone) Currently, I compile two reports each month. The Summary Status of Funds report and the Detail Status of Funds report. While the data mart has made it easier to run these reports than in the past, there is still considerable room for improvement. Currently, the Detail report takes at least 2 full days to prepare. It is my belief that through enhanced reports using Microstrategy Desktop, the currently two day report could be run virtually at the click of a button. A report directly from the Data Mart, in addition to saving time, would also be more accurate than a report that requires two days of manipulation in MS Excel. Jeff Scudder and I were working on this report before he left, but more work is required.

8/3/01 (Mark Mandrella): Called Dave Pappone and set up a meeting to further discuss the requirements for this report. The meeting is scheduled for 8/6/01 at 1:00 on ROB3-4642.

9/28/2001 (Keisha Contee) Annie will meet with David Pappone to discuss the requirements for this report on Tuesday, October 2, 2001.

10/12/2001 (Keisha Contee) Annie has met w/ David and gathered requirements. Keisha is working on a required table that is needed for the report.



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ID: 162 - CFO data mart Security

Request Prod. Support **Priority** Medium **Assigned** Keisha Contee
Open Date: 7/25/2001 3:00:00 PM **Requestor** Russell Young
Target Date: **Estimated Effort** 0
Closed 10/12/2001 1:01:01 PM **ApplicationType:** CFO DataMart
Description

As part of TO 75 there is to be an administrative review.

Under this action, one of the first things I need to get done is a cleanup of who has access to the CFO data mart. The CFO data mart security methods should mirror those of the FP data mart. This means changing the IDs to the EDNET logon IDs, password change on initial logon, and password expiration. Further there are IDs assigned that I do not know to whom they belong to. I would also like to see each individual/group have their own ID. So that the administrative ID used by me and David would be different from that used by Accenture. This would enable us to better track usage of the data mart.

I would like some help in accomplishing this but we also need to know who will need access and what type.

Resolution:

Activity

7/25/2001 (Thomas Schweikert) Assign it to Annie. You and Annie should try to print out a list of all of the user ids and identify those that Accenture owns and which of those can be deleted. Also identify which ids are shared, delete them and create named user ids (such as one for yourself). Then we need a meeting with Russell and Willie Sutton (FP data mart) to review the ids that SFA owns and clean those up as well.

7/31/2001 (Keisha Contee) Sent email to Willie Sutton asking if he could send info on the FP users, their user groups, and which users should be deleted or maintained.

Annie will reporting access through the MicroStrategy tool.

8/1/2001 (Keisha Contee) Arranged meeting for August 9 to discuss security issues.

8/2/2001 (Nancy Krecklow) Nancy is referring to the list of Data Mart users: some of the user ids at the bottom on the last page that are enclosed in 'red' are not FP users. These are userids that we will need to determine whether or not they are valid users.

8/9/2001 (Keisha Contee) Attended meeting w/ Russell and David. They will finalize user groups and decide if there should be one security officer for data marts.

8/27/2001 (Keisha Contee) Will attend another meeting on Sept 6 to finalize security plan

9/26/2001 (Keisha Contee) Jim Green had a question concerning the security of the data marts. I sent him the installation procedures, a document of the users and groups, and a brief synopsis of how Microstrategy security works.



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ID: 163 - File Layout change

Request Enhancement **Priority** Low **Assigned** Keisha Contee
Open Date: 7/25/2001 3:15:00 PM **Requestor** Russell Young
Target Date: **Estimated Effort** 0
Closed: **ApplicationType:** CFO DataMart

Description

Sometime in the mid August timeframe, the Mod Partner - CIO will be moving the Informatica applications from a Sun server to an HP server. The Mod Partner - CIO is planning this effort and will be the main group responsible for it. We will have to test to verify that our processes are still working appropriately. Their current plan is to have the HP environment up so that we can 'run in parallel' (this does NOT mean that we will be updating the data base twice) and verify that the process works appropriately prior to turning off the Sun server.

The Informatica resource who originally installed the product will be back to re-install it on the HP server. In addition, Chirayu Patel, who developed the Informatica processes for both the CFO and FP data marts, will be back to help verify and test the application on the HP server.

Resolution:

Activity

7/25/2001 (Russell Young) At some point we need to contact the Ed's CFO to see if their new system will change the file we will receive after September 30. This file update process is part of the maintenance Task Order. If you going to have the Informatica people in can we build some time in their schedule to work on this. I guess we need first to talk to ED CFO about this.

7/25/2001 (Nancy Krecklow) Thanks for the heads up on the potential file layout change. When Tom returns next week he will need to set up a meeting with you to discuss this further (Anna McDonald probably needs to be involved in this meeting). If the file layout will change effective Oct 1st, we need time to make sure that we have the proper Informatica process in place to accept the new layout.

7/27/2001 (Keisha Contee) Will contact Russ Young to set up a meeting to discuss the issue further.

7/31/2001 (Keisha Contee) Set up meeting on August 7 to discuss issues.

8/7/2001(Keisha Contee) Nancy and I decided to cancell the meeting because Anna MacDonald would not be availale. Meeting will be scheduled for sometime next week.

8/27/2001 (Keisha Contee) The meeting was rescheduled for August 29

8/29/2001(Keisha Contee) The meeting was cancelled because key players would not be able to attend. I found that Anna is not the lead for this effort. The lead is James Perry. I have sent him an email



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requesting his assistance, but he has yet to respond.

9/11/2001(Keisha Contee) Spoke with Russell Young said the Oracle Financials extract may not be implemented until January 1, 2002. Therefore, this issue has taken low priority. Russell will be our point of contact for this issue.

ID: 192 - Update the description fields in the dimension tables

Request **Priority** High **Assigned** Keisha Contee
Open Date: 8/15/2001 1:00:00 PM **Requestor** Russell Young
Target Date: **Hours:**
Date Closed: 10/26/2001 10:00:00 AM **ApplicationType:**CFO DataMart
Description:

CFO DataMart contains the value 'unknown' in many of its description fields within the dimension tables.

Resolution:

Activity

8/15/2001 (Keisha Contee) We found that the descriptions do not come over in the source. They need to be manually updated evr six months. I am generating a list of unknown and existing descriptions along with their codes. This list will be given to Russell and Dave. Once the update the list, it can be reloaded into the database.

8/16/2001 (Keisha Contee) All enhancements have been put on hold until we acquire a test environment.

9/27/2001 (Keisha Contee) The descriptions have been sucessfully loaded and tested in the test environment.

9/28/2001 (Keisha Contee) I have decided to update and migrate the org codes, channel ids, and descriptions at the same time. The migration could not be performed because I was unable to open the lkp_object.xls file sent by Russell. I sent him an email asking for him to resend the file. The migration will be rescheduled for early next week.

10/12/2001(Keisha Contee) Put in a change request for Monday at 4pm.



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ID: 194 - Automate process of modifying and adding descriptions

Request Enhancement **Priority** High **Assigned** Keisha Contee
Open Date: 8/15/2001 8:00:00 AM **Requestor** Russell Young
Target Date: 10/15/2001 **Estimated Effort** 0
Close: **ApplicationType:** CFO DataMart

Description:

There is currently no process to update or add new descriptions to to the data mart.

Resolution:

Activity

8/15/2001 (Keisha Contee) Chirayu, Annie, and Keisha plan make the enhancement on Saturday August 25.

8/27/2001 (Keisha Contee) Waiting for Test environment

9/26/2001 (Keisha Contee) We have a Test environment. Also the Production environment has been upgraded to Oracle 8.1.7.

I spoke with Annie and she will begin gathering requirements from Jeff beginning next Monday, October 1.

ID: 195 - Document the update process for the CFO data mart

Request Enhancement **Priority** Low **Assigned** Keisha Contee
Open Date: 8/16/2000 3:00:00 PM **Requestor** Annie Barton
Target Date: **Estimated Effort** 0
Closed: 10/26/2001 10:00:00 AM **ApplicationType:** CFO DataMart

Description:

Document the update process for the CFO data mart.

Resolution:

Activity:

ID: 196 - Document table dependencies and descriptions

Request Enhancement **Priority** Low **Assigned** Keisha Contee
Open Date: 8/16/2001 3:00:00 PM **Requestor** Annie Barton
Target Date: **Estimated Effort** 0
Closed: 10/12/2001 5:00:00 PM **ApplicationType:** CFO DataMart

Description:

Document the table dependencies and add table descriptions for the CFO warehouse



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Resolution:

Activity

9/18/2001 (Keisha Contee) Need to install Oracle Designer to retrieve the latest information on the data marts.

For the past week I have tried to install Oracle Designer. I have asked assistance from Annie, Chirayu, Terri, and Dorothy. Terri suggested uninstalling everything and she will assist in the installation once again. Hopefully, this task will be complete by Friday.

9/26/2001(Keisha Contee) I will not load Oracle Designer because of installation problems. I am going to load ERWIN and document the table dependencies using this tool.

9/27/2001 (Keisha Contee) I was able to load ERWIN. I created an ER-diagram of CFO and FP.

10/12/2001 (Keisha Contee) Annie has created a report in Microstrategy to list the tables and their attributes in the data marts.

ID: 215 - Data Mart Contact List

Request Prod. Support **Priority** Low **Assigned** Mark Mandrella
Open Date: 8/21/2001 5:00:00 PM **Requestor** Jim Greene
Target Date: **Estimated Effort** 0
Closed: 10/31/2001 9:00:00 AM **ApplicationType:** CFO DataMart

Description:

Create a data mart contact list with all data mart users and support.

Resolution:

Activity

9/27/2001 (Keisha Contee) This request has reassigned to Lisa Phillips

ID: 249 - Two files did not load into the CFO Data Mart

Request Prod. Support **Priority** High **Assigned** Keisha Contee
Open Date: 9/13/2001 8:00:00 AM **Requestor** Keisha Contee
Target Date: **Estimated Effort** 0
Closed: 10/26/2001 10:00:00 AM **ApplicationType:** CFO DataMart

Description:

The files sfa.Sunday.090901.log and sfa.091201.log were not loaded into the CFO data mart.

Resolution:



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Activity

09/13/2001 (Keisha Contee) I checked the log files for the two dates and they both said that the FTP was unsuccessful and that the export terminated unsuccessfully. The dmp files do not come over.

09/13/2001(Keisha Contee) I emailed Anna MacDonald and asked her to resend the files.

09/18/2001 (Keisha Contee) I was unable to test because the dev environment had not been accessible do to the Oracle upgrade. I began testing today and I am having a problem connecting to the warehouse via Informatica. May ask Chirayu for assistance.

9/26/2001 (Keisha Contee) I was able to load the all but 13 Object codes in the Test Environment. I received the new Object codes in an excel spreadsheet from Russell. There were some fields in these records that were not populated, therefore they could not be loaded into the data mart. I will lcompare the ID's of the 13 unloaded object codes to the ID's in a backup file. If I find matching records, I will load then into the data mart. When Russellll returns next Monday, I will show him the 13 records that did not load and ask him to verify the data.

I have put in change request to migrate the changes to Production.

10/12/2001 (Keisha Contee) A change requesthas been scheduled for Monday at 4pm.

ID: 264 - Did not receive the 10/01/01 data file

Request	Prod. Support	Priority High	Assigned	Keisha Contee
Open Date:	10/2/2001 10:00:00 AM	Requestor Keisha Contee		
Target Date:		Estimated Effort	0	
Closed	10/12/2001 5:00:00 PM	ApplicationType: CFO DataMart		
Description				

We did not receive the source file sfa.100101.dmp.

Resolution:

Activity

10/01/2001 (Keisha Contee) I sent an email to Anna Macdonald requesting for the source file and its log file.

ID: 266 - CFO Orcale instance is down

Request	Prod. Support	Priority High	Assigned	Keisha Contee
Open Date:	10/8/2001 10:00:00 PM	Requestor Keosha Contee		
Target Date:		Estimated Effort	0	
Closed	10/8/2001 11:00:00 AM	ApplicationType: CFO DataMart		



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Description

The CFO Oracle Instance is down.

Resolution:

Activity

10/08/01 (Keisha Contee) Rich restarted the CFO data mart. It seems to have not restarted after the reboot yesterday. Rich is looking into the reason why this occurred.

ID: 267 - data from 10/05/2001 did not load into fact tables

Request	Prod. Support	Priority	High	Assigned	Keisha Contee
Open Date:	10/8/2001 11:37:00 AM	Requestor	Keisha Contee		
Target Date:		Estimated Effort	0		
Closed:	10/26/2001 10:00:00 AM	ApplicationType:	CFO DataMart		

Description

the data from 10/05/2001 did not load into the fact tables.

Resolution:

Activity

10/12/2001 (Keisha Contee) It seems as though only part of the data on 10/05 was loaded into the data mart. Once the data mart is updated, the records will be backed out of the fact tables and reloaded.

ID: 268 - Did not receive extracts from 10/04/01

Request	Prod. Support	Priority	High	Assigned	Keisha Contee
Open Date:	10/8/2001 11:40:00 AM	Requestor	Keisha Contee		
Target Date:		Estimated Effort	0		
Closed	10/12/2001 5:00:00 PM	ApplicationType:	CFO DataMart		

Description

Did not receive extracts from 10/04/01.

Resolution:

Activity

10/08/2001 (Keisha Contee) I emailed Anna and asked her to send the extracts for: sfa.100401 and sfa.sunday.100401.

10/12/2001 (Keisha Contee) Anna stated that zero records were processed for that day.



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ID: 275 - User ID and password

Request Prod. Support **Priority** High **Assigned** Mark Mandrella
Open Date: 10/30/2001 9:20:00 AM **Requestor** David Pappone
Target Date: **Estimated Effort** 0
Closed 10/30/2001 12:00:00 PM **ApplicationType:** CFO DataMart

Description

I can't get into the data mart and I need to ASAP. Annie changed my user name and password last week, but now I can't seem to get in. Help! Thanks.

David J. Pappone
U.S. Department of Education

Resolution:

We fixed his password in Test and Production
Activity



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FP Data Mart Operations Status

Work Accomplished During This Period

- Finalized documentation of for FP data mart.
- Completed documentation of FP data mart ER-diagram.
- Completed monthly FP load for August.
- Provided daily monitoring of FP data mart availability.
- Continued tracking SIRs and enhancement requests.

Issues or Anticipated/Current Problems

None

Planned Work for Next Period

- Continue data mart knowledge transfer activities.
- Complete FP monthly batch load for September.
- Complete documentation for FP data mart security plan.
- Continue Microstrategy reporting enhancements.
- Continue to provide daily monitoring of FP Data Mart.

Batch Job Results (FP)



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Help Desk Monthly Throughput (FP)

Bug Fix

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

Prod. Support

Category	High	Medium	Low	Total
Carry Forward	0	2	2	4
New	3	0	0	3
Closed	3	2	0	5
End of Month Balance	0	0	2	2

Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	1	3	3	7
New	0	1	2	3
Closed	0	3	1	4
End of Month Balance	1	1	4	6

Phase II Requests

Category	High	Medium	Low	Total
Carry Forward	0	1	3	4
New	0	0	0	0
Closed	0	0	0	0
End of Month Balance	0	1	3	4

Help Desk Request Summary (FP)

Total Requests: 25

ID	Status	RequestType	Title	Priority	DateOpen	DateClosed
72	Open	Phase II	Lender Scorecard and Other New Reports - E2	Medium	6/6/01	
76	Open	Phase II	Top 100 Loan Holders - E6	Low	5/22/01	
78	Open	Enhancement	799 Reports and Lender Search Reports - E8	High	6/6/01	
80	Open	Phase II	Drill to multiple templates in report - E32	Low	7/28/01	
81	Open	Enhancement	1189 /1130 Reports - E10,15	Medium	6/7/01	



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Need to revise the way that the values are determined for the Lender Scorecard. In addition, reports will be required that show the build up of the summary information that is on the scorecard.

Resolution:

Activity

7/13/2001 (Annie Barton) Waiting for Power Users to meet and discuss this issue. Meeting is to take place in the beg of August.

8/21/2001 (Annie Barton) Meeting with users to define requirements for Lender Score Card.

8/22/2001 (Annie Barton) This enhancement has been moved to Phase II.

ID: 76 - Top 100 Loan Holders - E6

Request	Phase II	Priority	Low	Assigned	Annie Barton
Open Date:	5/22/2001 12:00:00 PM	Requestor	Harding/Sensenev		
Target Date:	5/1/2002	Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

We would like to make changes to the way that the Top 100 Loan Holders report is created. We will need to discuss the requirements in further detail. Collect history for Lender Associations and create this report 'As of' a particular date. Only include those lenders if the associate lender has a balance > 0. Use the parent LID name, city, and state.

Resolution:

Activity

8/21/2001 (Annie Barton) Waiting for Power Users meeting in August.

8/21/2001 (Annie Barton) Users do not need report for another year and a half. Requires us to collect history on Lender Associations.

9/7/2001 (Annie Barton) This has been moved to Phase II

ID: 78 - 799 Reports and Lender Search Reports - E8

Request	Enhancement	Priority	High	Assigned	Mark Mandrella
Open Date:	6/6/2001 12:00:00 PM	Requestor	Paul Sullivan		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description



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There are times when the entire 799 report (and possibly the Lender Search report) needs to be viewed (and possibly printed). It would be nice if this could occur as a single document instead of having to view/print several individual reports. This needs to be further researched. With the current structure of the reports with information in the 'page by' area, this might mean that the 'full report' does not display as expected.

Resolution:

Activity

8/21/2001 (Annie Barton) Waiting to get NT ID approved for Annie. Request may be reassigned to Mark because he has an ED LAN account.

8/21/2001 (Annie Barton) Mark needs to contact Carl Reese to add Mark's User ID to SFA NT001 so that he can create documents.

9/6/2001 (Annie Barton) Mike Duffin contacted me and said users would like enhancement fixed ASAP.

9/18/2001 (Annie Barton) Since Mark has been out and this is a high priority, I have started working on this. I received my NT ID so that Carl can add me to the permissions on the document directory. I contacted Carl notifying him of this request. He added me to the document directory, however, I need access to a frame relay machine. I talked with Josh Nash and he set me up on a frame relay machine. I installed MSTR Desktop on that machine and started working on this enhancement.

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

Request	Phase II	Priority	Low	Assigned	Annie Barton
Open Date:	7/28/2001 10:00:00 AM	Requestor	Susan Haenel-Beck		
Target Date:	5/1/2002	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.

ID: 81 - 1189 /1130 Reports - E10,15

Request	Enhancement	Priority	Medium	Assigned	Mark Mandrella
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Task Order 75 - Data Mart Operations

Open Date: 6/7/2001 12:00:00 PM **Requestor** Chiu/Duffin
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

For 1189 parts, the selection criteria needs to be entered 9 times to get the 'full report'. There should be a way to view the complete report without having to enter the selection/prompt information multiple times.

Resolution:

Activity

8/21/2001 (Annie Barton) Mark needs to contact Carl Reese to add Mark's User ID to SFA NT001 so that he can create documents.

9/6/2001 (Annie Barton) Mike Duffin contacted me and said users would like enhancement fixed ASAP.

9/18/2001 (Annie Barton) Since Mark has been out and this is a high priority, I have started working on this. I received my NT ID so that Carl can add me to the permissions on the document directory. I contacted Carl notifying him of this request. He added me to the document directory, however, I need access to a frame relay machine. I talked with Josh Nash and he set me up on a frame relay machine. I installed MSTR Desktop on that machine and started working on this enhancement.

ID: 88 - New Report needed (ED form 799) - E18

Request Phase II **Priority** Low **Assigned** Annie Barton
Open Date: 6/14/2001 12:00:00 PM **Requestor** Jerry Wallace
Target Date: 5/1/2002 **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

A new report is need to add the information currently available on X200 Inquiry Sheet - Tracking File. This report shows all transactions related to an ED form 799 by LID and quarter

Resolution:

Activity

8/21/2001 (Annie Barton) Need to determine if the data already exists in the data mart. If not, a new Informatica process will need to be created to load the necessary data.

9/7/2001 (Annie Barton) The data does not exist in the data mart so this enhancement will be completed in Phase II or Phase III.



Task Order 75 - Data Mart Operations

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

Request Prod. Support **Priority** Low **Assigned** Annie Barton
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 loose access to Microstrategy reports when patches are installed on the NT server.

Resolution:

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.

ID: 185 - Add the Cumulative Average Balances from Part IV

Request Enhancement **Priority** Medium **Assigned** Annie Barton
Open Date: 8/7/2001 8:00:00 AM **Requestor** Jerry Wallace
Target Date: **Estimated Effort** 0
Closed 10/11/2001 12:00:00 PM **ApplicationType:**FP DataMart
Description

Add the Cumulative Average Balances from Part IV for Consolidation Loan Rebate Fee Analysis Report.

Resolution:

Activity

9/5/2001 (Annie Barton) waiting for Power Users to approve enhancement.

9/18/2001 (Annie Barton) Emailed Nettie Harding asking her to submit this proposal to the work group for their approval.

10/11/2001 (Annie Barton) Work Group did not approve this enhancement. So, I will not make the change to the report.

ID: 202 - Inactive Lender Report

Request Enhancement **Priority** Low **Assigned** Annie Barton
Open Date: 8/22/2001 10:00:00 AM **Requestor** Jerry Wallace
Target Date: 10/22/2001 **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart



Task Order 75 - Data Mart Operations

Description

He wants a report that shows all of the Lids, State, City, Portfolio Ending Balance, Last Quarterly Filing Date. This should only display Lenders that have NOT filed a 799 in the last 4 quarters, but have filed a 799 in the past 5-8 quarters. Also, we should only include Lenders where the Portfolio Ending Balance is greater than 10,000.

Resolution:

Activity

9/12/2001 (Annie Barton) Started working on this enhancement. I opened an MSTR Tech Support Case (# 133930) dealing with advanced filters. Currently, I am waiting for the Tech Engineer to return my call.

9/20/2001 (Annie Barton) Attempting to find a new solution to get this report developed. Will continue working on this enhancement.

9/27/2001 (Annie Barton) Developed sample report in Test Environment. Contacted Jerry to have him review it.

11/01/01 (Annie Barton) Have not heard from Jerry regarding the report. There are actually no results returned because I cannot find a lender that fits that description. So, I sent Jerry another email today asking him if he can find a lender that fits the criteria. If not, does he want to cancel the report?

ID: 203 - Region Re-Work

Request	Enhancement	Priority	Low	Assigned	Keisha Contee
Open Date:	8/22/2001 10:00:00 AM	Requestor	Jerry Wallace		
Target Date:	10/22/2001	Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

Look at Informatica Load Process and determine how D_Lndr_Regions and D_Lndr_States tables are loaded.... From what source table? Then, after determining that we need to contact the users and see if we have the correct Region--> State mapping and identify if we need to change the source mapping.

Resolution:

Activity

ID: 210 - Change the Region Prompt to State Prompt on report

Request	Enhancement	Priority	Medium	Assigned	Annie Barton
Open Date:	8/23/2001 1:00:00 PM	Requestor	Nettie Harding		
Target Date:	9/30/2001	Estimated Effort	0		
Closed	10/11/2001 12:00:00 PM	ApplicationType:	FP DataMart		



Task Order 75 - Data Mart Operations

Description

Change the Region Prompt on the Lender Consolidation Analysis Report to a State Prompt. Also, remove the 'Region' attribute from the report and add the 'State' attribute.

Resolution:

Added the Lender State Prompt to the report and removed the Region Prompt.

Activity

8/5/2001 (Annie Barton) Need the Power Users to approve change to enhancements.

9/18/2001 (Annie Barton) Emailed Nettie Harding asking her to submit this proposal to the work group for their approval.

10/11/2001 (Annie Barton) Received approval from work group. I will proceed to make the appropriate changes.

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

Request	Bug Fix	Priority	Medium	Assigned	Annie Barton
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.

ID: 228 - Search for Lender by name

Request	Bug Fix	Priority	Medium	Assigned	Annie Barton
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.



Task Order 75 - Data Mart Operations

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.

ID: 230 - Login before projects are displayed

Request Bug Fix **Priority** High **Assigned** Annie Barton
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.

Resolution:

Activity

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

ID: 238 - Cannot export to an excel document

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

Description

Cannot export to an excel document

Resolution:

Activity

8/3/2001 (Annie Barton) NOT CLOSED!!! I Replaced some of the code in the ExportOptions.asp file (on line 2); however, now they get an error message that really has no significance... still investigating further.



Task Order 75 - Data Mart Operations

9/6/2001 (Annie Barton) Paul is the only user having this issue and we are working closely with Microstrategy Tech Support to resolve the problem.

9/17/01 (Annie Barton) Emailed Tech Support regarding the Tech Support Case #134450. We decided to have Paul install a normal version (w/o the 'IS' extension) of Internet Explorer. I emailed Paul to ask him

ID: 254 - Develop Dependency Matrix for FP Data Mart

Request Prod. Support **Priority** Medium **Assigned**
Open Date: 9/17/2001 12:00:00 PM **Requestor** Annie Barton
Target Date: 11/1/2001 **Estimated Effort** 0
Closed 10/31/2001 12:00:00 PM **ApplicationType:** FP DataMart

Description

Need to develop some documentation that will be used to support the FP Data Mart. This involves dependency matrices, report definitions, and Informatica documentation.

Resolution:

Activity

9/17/2001 (Annie Barton) Started developing Fact table to Fact Dependency Matrices.

9/18/2001 (Annie Barton) Have completed most of the spreadsheets for attributes, facts, and table dependencies.

10/31/01 (Annie Barton) Have completed dependency matrixes. However, these are reports that are extracted out of Informatica. So, they do not need to be maintained manually. We can simply run reports from Informatica.

ID: 255 - Element List Prompts for Documents

Request Enhancement **Priority** Low **Assigned** Annie Barton
Open Date: 9/18/2001 **Requestor** Annie Barton
Target Date: 9/18/2003 **Estimated Effort** 0
Closed **ApplicationType:** FP DataMart

Description

The users would like to be prompted only once for the 799, 1189, 1130 document reports. These documents are made up of several reports all containing the exact same prompts. Right now, users are prompted for the same information multiple times for one document. They would like to be prompted only once. They want this prompt be an element list prompt instead of a value prompt.



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Resolution:

Activity

9/18/2001 (Annie Barton) I logged this with MSTR Tech Support. They do not have a work around. The only work around is to create a value prompt. This will prompt users only once per document, but the users will have to remember the specific GA id, LID, and Quarter. MSTR has logged it as MSTR enh #142588. We will have to wait for the release after MSTR 7.2 (which will probably be in about 2 years)

ID: 263 - New Desktop CD Key

Request	Prod. Support	Priority	Medium	Assigned	Annie Barton
Open Date:	9/25/2001 12:00:00 PM	Requestor	Jim Greene		
Target Date:		Estimated Effort	0		
Closed	10/5/2001 12:00:00 PM	ApplicationType:	FP DataMart		

Description

We need to supply Jim Greene with a CD Key that will ONLY install MSTR Desktop

Resolution:

Activity

9/25/2001 (Annie Barton) Called Tech Support and logged Case #143329. They will look into finding a key for me.

9/26/2001 (Annie Barton) Tech Support contacted me and told me that I need to contact another individual at MSTR. I sent her an email.

9/27/2001 (Annie Barton) Called Gisella Parker and she was not there. I left a message. Called her later and she directed me to contact Becky Savas at 703-714-6719. Called Becky and she said she would do her best to get a CD Key by the end of the week.

9/28/2001 (Annie Barton) Called Becky again, she was not there. So, I left a message.

10/03/2001 (Annie Barton) I called Becky Savas and she was not there. I called her supervisor, Bill Chatterton, and he was also unavailable. So, I left a message.

10/05/01 (Annie Barton) We finally got a CD from MSTR that will only install Desktop on users' machines. I have added that CD Key info to the Installation Document

ID: 265 - Move Mississippi to Atlanta Region

Request	Enhancement	Priority	Medium	Assigned	
Open Date:	10/1/2001 10:00:00 AM	Requestor	Richard Criswell		
Target Date:		Estimated Effort	0		
Closed	10/1/2001 5:00:00 PM	ApplicationType:	FP DataMart		



Task Order 75 - Data Mart Operations

Description

Users needed Mississippi moved to Atlanta region. It was previously in Dallas.

Resolution:

Activity

ID: 272 - Missing Data for Lender 799 Forms

Request Prod. Support **Priority** High **Assigned**
Open Date: 10/12/2001 12:00:00 PM **Requestor** Susan Haenel-Beck
Target Date: **Estimated Effort** 0
Closed 10/31/2001 12:00:00 PM **ApplicationType:**FP DataMart

Description

There is some some data missing for 815483. The data exists in FFEL for Dec 2000, March 2001, and June 2001. However, we do not have any of that data in the Data Mart.

Resolution:

Raytheon was extracting the incremental data loads using the wrong dates. So, were not getting a full data set from them for the incremental files. They fixed the program to extract using the correct dates.

Activity

10/11/2001 (Annie Barton) Contacted Chirayu to see if we received data for that particular Lender in the Files from Raytheon. I also started researching the Program Raytheon runs to extract the data to determine if the problem may exist in the code.

10/15/01 (Annie Barton) Contacted Bob Hurley at Raytheon and he is going to look into the code to see if the problem exists there. Chirayu never received the missing data from Raytheon. So, the problem must exist with the Raytheon extract.

10/16/01 (Annie Barton) The problem does exist with Raytheon's program. We re-wrote the program and are going to extract the entire FP Data Load again. Bob should have this ready relatively soon.

10/31/01 (Annie Barton) We got the data loaded!!!!

ID: 273 - Add descriptions for Document_Type_Desc

Request Enhancement **Priority** Low **Assigned**
Open Date: 10/7/2001 12:00:00 PM **Requestor** Annie Barton
Target Date: **Estimated Effort** 0
Closed 10/11/2001 12:00:00 PM **ApplicationType:**FP DataMart

Description

Need to add descriptions to the document_type id field in the data mart. These exist in LKP_DOCUMENT_TYPE



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Resolution:

I added the descriptions to the appropriate column in LKP_DOCUMENT_TYPE

Activity

10/07/2001 (Annie Barton) Requested the descriptions from Angela Roca-Baker

10/09/2001 (Annie Barton) Received descriptions from Angela.

10/11/2001 (Annie Barton) Added descriptions to the table in the data mart.

ID: 274 - Length of Time to keep History (Web)

Request Enhancement **Priority** Low **Assigned**
Open Date: 10/10/2001 12:00:00 PM **Requestor** Nettie Harding
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

We need to modify the settings in WEB to delete History after 60 days.

Resolution:

Activity

ID: 277 - Cannot access Test/Dev using Web

Request Prod. Support **Priority** High **Assigned**
Open Date: 10/26/2001 12:00:00 PM **Requestor** Annie Barton
Target Date: **Estimated Effort** 0
Closed 10/26/2001 3:00:00 PM **ApplicationType:**FP DataMart

Description

The test box (SFANT001) is not accessible using the Web

Resolution:

Carl Reese told me that they added that sever to a domain and may have some configuration issues. They resolved them and now we can access the projects.

Activity

10/26/01 (Annie Barton) I contacted Carl Reese.

ID: 278 - Cannot access E-Trainer

Request Prod. Support **Priority** High **Assigned**
Open Date: 10/29/2001 12:00:00 PM **Requestor** Annie Barton
Target Date: **Estimated Effort** 0



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Closed 10/29/2001 1:00:00 PM **ApplicationType:**FP DataMart

Description

Cannot access E-Trainer over the Internet. This problem may be related to #277

Resolution:

Carl Reese had to fix some configuration settings because they added the server to a domain.

Activity

ID: 279 - Use Address Info for Parent Lender

Request Enhancement **Priority** Low **Assigned**

Open Date: 10/31/2000 12:00:00 PM **Requestor** Susan Haenel-Beck

Target Date: **Estimated Effort** 0

Closed **ApplicationType:**FP DataMart

Description

Susan thinks it may be a good idea to use the Parent Lender address information instead of the child lender in the prompt associated with 'Lender Consolidation Loan Rebate Fee Analysis' Report.

Resolution:

Activity

10/31/01 (Annie Barton) I discussed this issue with Susan and she is going to contact Nettie Harding for her input. I am waiting to hear back from Nettie.