

# Task Order 75 - Data Mart Operations

## Data Mart Operations Monthly SLA Metrics Report Deliverable 75.1.3c

Period Ending: 12/31/01



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

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## Task Order 75 - Data Mart Operations

### Introduction

This is the seventh 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 \*\*Note: Downtime for backups and scheduled outages are not shown

Date	Availability (%)	Notes
Sat - December 1	100%	
Sun - December 2	100%	
Mon - December 3	91%	Switch 3, a Meriden router in the VDC, started to drop major routes at 6:15 AM EST
Tues - December 4	100%	
Wed - December 5	100%	
Thurs - December 6	95%	On Wednesday evening at 10:10 PM EST, the SFA web sites became inaccessible.
Fri - December 7	100%	
Sat - December 8	100%	
Sun - December 9	100%	
Mon - December 10	100%	
Tues - December 11	100%	
Wed - December 12	80%	The IFAP, Schools Portal and the Data Mart sites were unavailable for 5 hours starting at 6:40AM.
Thurs - December 13	100%	
Fri - December 14	100%	
Sat - December 15	100%	
Sun - December 16	100%	
Mon - December 17	100%	
Tues - December 18	100%	
Wed - December 19	100%	
Thurs - December 20	100%	
Fri - December 21	100%	
Sat - December 22	100%	
Sun - December 23	100%	
Mon - December 24	100%	
Tues - December 25	100%	
Wed - December 26	100%	
Thurs - December 27	100%	
Fri - December 28	100%	
Sat - December 29	100%	
Sun - December 30	100%	
Mon - December 31	100%	



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### CFO Data Mart Operations Status

#### *Work Accomplished During This Period*

- Provided daily monitoring of CFO data mart file loads.
- Provided daily monitoring of CFO data mart availability.
- Continued tracking SIRs and production support requests.

#### *Issues or Anticipated/Current Problems*

- none

#### *Planned Work for Next Period*

- Continue daily monitoring of CFO data mart file loads.
- Continue daily monitoring of CFO data mart availability.
- Continue tracking SIRs and production support requests.
- Automate process of modifying and adding descriptions in CFO data mart.
- Rename subtotal columns in report
- Create a new "Inactive Lenders" report.



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### Batch Job Results (CFO)

Date Processed	Number of Rows Processed	Notes
Sat - December 1	968	
Sun - December 2	0	
Mon - December 3	42	
Tues - December 4	2,684	
Wed - December 5	1,354	
Thurs - December 6	65,496	
Fri - December 7	55,646	
Sat - December 8	1,116	
Sun - December 9	0	
Mon - December 10	12	
Tues - December 11	2,228	
Wed - December 12	44,088	
Thurs - December 13	1,358	
Fri - December 14	1,206	
Sat - December 15	2,642	
Sun - December 16	0	
Mon - December 17	0	Log file confirms zero records loaded
Tues - December 18	2,104	
Wed - December 19	29,702	
Thurs - December 20	18,006	
Fri - December 21	1,968	1,968 Records shown in toad were loaded, but need log file from Michelle Briscoe for confirmation
Sat - December 22	3,126	
Sun - December 23	0	
Mon - December 24	0	Log file confirms zero records loaded
Tues - December 25	0	Christmas holiday
Wed - December 26	0	Log file confirms zero records loaded
Thurs - December 27	1,556	
Fri - December 28	41,820	
Sat - December 29	1,010	
Sun - December 30	0	
Mon - December 31	720	



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### Help Desk Monthly Throughput (CFO)

#### Product Support

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

#### Enhancement Requests

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

#### Bug Fix

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

### Help Desk Request Summary (CFO)

Total Records: 9

ID	Status	Request Type	Title	Priority	DateOpened	DateClosed
288	Closed	Bug Fix	Unable to see all consolidation elements on page-by on Web	Medium	12/4/2001	12/11/2001
292	Open	Bug Fix	Missing Log file for 12/21/01	Medium	12/21/2001	
194	Open	Enhancement	Automate process of modifying and adding descriptions	High	8/15/2001	
153	Closed	Enhancement	New Monthly Report - Status of Funds	Low	7/20/2001	12/14/2001
287	Open	Enhancement	Ability to change the subtotal titles	Low	12/3/2001	
163	Open	Enhancement	File Layout change	Medium	7/25/2001	



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ID	Status	Request Type	Title	Priority	DateOpened	DateClosed
284	Closed	Prod. Support	Missing dmp and log file	High	11/26/2001	12/4/2001
286	Closed	Prod. Support	Channel - Organization relationship wrong	High	12/3/2001	12/10/2001
289	Closed	Prod. Support	Remove residual backup and temp tables from CFO Admin	Low	12/10/2001	12/10/2001



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### Help Desk Request Details (CFO)

**Total Records:** 9

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

**Request** Enhancement **Priority** Low **Assigned** Robert Audet  
**Open Date:** 7/20/2001 10:00:00 AM **Requestor** David Pappone  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/14/2001 2:00:00 PM **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:

- Altered the warehouse model (See .ER1) diagram
- Read the Addendum to the SFA-CFO Data Mart Detailed Design
- Read the SFA-CFO FTP Process and Instructions
- Used consolidations for the Division page-by

#### 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.

11/26/01 (Bob Audet) Provided new reports to the David Pappone and Russell Young to review. Awaiting their feedback.



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11/26/01 (Bob Audet) Waiting for feedback from David and Russell on these reports.

11/30/01 (Bob Audet) Meeting with David Pappone this afternoon to discuss feedback from his boss, Mary Grace.

12/05/01 (Bob Audet) Obtained feedback from Mary Grace and incorporated the feedback. Still testing new changes.

12/10/01 (Bob Audet) Migrated these changes identified in the Resolutions tab to production. Sent an email to the CFO budget users to obtain their feedback.

12/14/01 (Bob Audet) David Pappone said that we could close the issue since he is happy with the reports.

**ID:** 163 - File Layout change

<b>Request</b>	Enhancement	<b>Priority</b>	Medium	<b>Assigned</b>	Tina Liu
<b>Open Date:</b>	7/25/2001 3:15:00 PM	<b>Requestor</b>	Russell Young		
<b>Target Date:</b>	2/1/2002	<b>Estimated Effort</b>	0		
<b>Closed</b>		<b>ApplicationType:</b>	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



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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 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. Russellll will be our point of contact for this issue.

11/26/01 (Bob Audet) Assigned to Bob.

**ID:** 194 - Automate process of modifying and adding descriptions

**Request** Enhancement **Priority** High **Assigned** Lisa Phillips

**Open Date:** 8/15/2001 8:00:00 AM **Requestor** Russell Young

**Target Date:** 2/1/2002 **Estimated Effort** 0

**Closed** **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 enahancement on Saturday August

**Log:** 25.

12/3/01 (Bob Audet) Set this issue to Postponed since the file layout change may not changed until January of 2002. 8/27/2001 (Keisha Contee) Waiting for Test environment

12/14/01 (Bob Audet) Changed to medium priority due to importance of this issue. Called Michelle Briscoe

9/26/2001 (Keisha Contee) We have a Test environment. Also the Prodcution environment has been about to obtain the new file layout and sample data. This may require ETL changes. upgraded to Oracle 8.1.7.



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1/2/2002 (Tina Liu) Reassigned to Tina. I spoke with Annie and she will begin gathering requirements from Jeff beginning next Monday, October 1.  
 If Chirayu is available, the update process can be completed by October 15.

11/26/01 (Bob Audet) Sent an email to Russell Young to determine all areas where we need to automate the update process. Started this for the object code --> object group --> cost type and organization --> division --> channel relationships. Awaiting feedback from Russell on whether we need to do the same for activity code --> project relationship and object 2, 3, and 4 relationships.

12/03/01 (Bob Audet) Sent another email to CFO Power Users to verify comments made on 11/26/01 and moved issue to 'Needs Clarification'

12/11/01 (Bob Audet) Met with Russell Young and he wants to set up a meeting with David Pappone and me to discuss how the Activity Code should be used. Note: The ETL routines will need modifications since they are currently incorrect. Furthermore, Russell wants to keep the Object 2, 3, 4 tables/relationships. Need to verify if the SQL Script is still used. Recommend CFO users maintaining relationship tables for the object --> object 2, 3, 4 mapping instead of SQL scripts. A new ETL routines will need to be created.

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

1/3/2002 (Tina Liu) sent email to Russell to follow up. Reassigned to Lisa.

**ID:** 284 - Missing dmp and log file

**Request** Prod. Support **Priority** High **Assigned** Lisa Phillips  
**Open Date:** 11/26/2001 12:30:00 PM **Requestor** Lisa Phillips  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/4/2001 10:30:00 AM **ApplicationType:** CFO DataMart  
**Description**

We were missing a log file and a dmp file for 11/25 and 11/11 load data.

**Resolution:**

**Activity**

11/26 (9:00am)- Sent Anna Macdonald and email requesting her ftp the files to the directory

11/26 (12:30pm)- Left Anna a voice mail asking her to contact me so I can check the status of the daily cfo loads

11/27 (11:58am)- Received email from Anna stating she is on maternity leave and to contact Michelle Briscoe at 401-8557.

11/27 (12:00pm)- Contacted Michelle and told her we are missing two dump files and to have them ftp'd to the server by eow.



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11/29 (9:30am)- Send Michelle an email reminding her to please ftp dmp files for 11/11 and 11/25 data.

11/30/01 (Bob Audet) Moved issue priority to High since the new reports and model will be ported over mid next week and we need to have this data loaded.

11/30 (2:05)- Called Michelle to verify that zero records were on missing dmp files. Michelle will be uploaded files to ftp server.

12/03/01 9:29 A.M. (Bob Audet) Noticed that the 12/01 and 12/02 files were missing. Called Michelle and she will create one file called sfa.Sunday.120201.dmp.Z that will include 12/01 and 12/02. We may need to run the process manually for this date. Confirm with Lisa Phillips.

12/04/01 (Bob Audet) Confirmed with Lisa that the data was loaded. Issue closed.

**ID:** 286 - Channel - Organization relationship wrong

<b>Request</b>	Prod. Support	<b>Priority</b> High	<b>Assigned</b> Robert Audet
<b>Open Date:</b>	12/3/2001 1:00:00 PM	<b>Requestor</b> David Pappone	
<b>Target Date:</b>		<b>Estimated Effort</b> 0	
<b>Closed</b>	12/10/2001 10:30:00	<b>ApplicationType:</b> CFO DataMart	

**Description**

David asked for the Channel -- Organization relationship in the production environment to be fixed. This issue should be fixed when the new changes are moved into production on 12/06/2001.

**Resolution:**

Ran the new ETL, which fixed the relationship between channel and organization.

**Activity**

**ID:** 287 - Ability to change the subtotal titles

<b>Request</b>	Enhancement	<b>Priority</b> Low	<b>Assigned</b> Tina Liu
<b>Open Date:</b>	12/3/2001 2:00:00 PM	<b>Requestor</b> David Pappone	
<b>Target Date:</b>	1/4/2002	<b>Estimated Effort</b> 0	
<b>Closed</b>		<b>ApplicationType:</b> CFO DataMart	

**Description**

David Pappone wanted the ability to rename the subtotal column names because the subtotal names are hard to determine what the Total represents.

**Resolution:**



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### Activity

12/03/01 (Bob Audet) Called MSTR Technical Services and opened Case #151030. This functionality is not available now or in the next release. Submitted to MSTR Technology for enhancement.

12/04/01 (Bob Audet) MicroStrategy Technology logged an enhancement request Enhancement (Log id 140457)

12/10/01 (Bob Audet) Received call from Technical Support and was told to use the following workaround, which DID NOT WORK. Click on the Sub-totals button on the report --> Click Advanced... --> Click New --> Add new Subtotal name --> Select the appropriate attributes in the across level section --> Click 'Ok' --> Check the new subtotal in the Definition Tab.

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

1/3/2002 (Tina Liu) Tried the workaround with some extra steps: 1. Delete original selection for "Total". 2. After the final step "Check the new subtotal in the Definition Tab", click on the Advanced button to select the right level again. Scheduled a phone call with Dave to talk about the workaround tomorrow morning around 10:00am.

**ID:** 288 - Unable to see all consolidation elements on page-by on Web

<b>Request</b>	Bug Fix	<b>Priority</b>	Medium	<b>Assigned</b>	Robert Audet
<b>Open Date:</b>	12/4/2001 3:00:00 PM	<b>Requestor</b>	Robert Audet		
<b>Target Date:</b>		<b>Estimated Effort</b>	0		
<b>Closed</b>	12/11/2001 2:00:00 PM	<b>ApplicationType:</b>	CFO DataMart		
<b>Description</b>					

When using a consolidation that contains a consolidation element totalling the numerous values (e.g., Assume that channel X has three divisions A, B, C). The consolidation element 'Total' equals A + B + C. The consolidation works fine on Desktop, but the 'Total' consolidation element does not appear on the Web. Only see divisions A, B, and C.

Other notes: The consolidation is a page-by field in the report, the Null Display = 0 in the Advanced Engine Settings in the Advanced tab of the Project Configuration menu.

### Resolution:

Changed the Null Display = 0 in the Advanced Engine Settings in the Advanced tab of the Project Configuration menu and stopped and restarted the Intelligent Server.

### Activity

12/04/01 (Bob Audet) Called MSTR Technical Services and opened issue #151530. It is trying to reproduce the issue on MSTR Web 7.1.

12/05/01 (Bob Audet) MSTR Technical Services unable to reproduce the issue. Got report to work on the web this morning and still testing to ensure proper results.



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**ID:** 289 - Remove residual backup and temp tables from cfoadmin

**Request** Prod. Support **Priority** Low **Assigned** Robert Audet  
**Open Date:** 12/10/2001 9:00:00 AM **Requestor** Richard Ryan  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/10/2001 10:00:00 **ApplicationType:** CFO DataMart

**Description**

Richard Ryan emailed Bob Audet to remove some residual temp and backup tables that are not used and take up needed space.

**Resolution:**

Emailed Richard Ryan to remove these tables as they are not used in the production environment and consume needed space. Also, confirmed with Chirayu Patel that these tables are not used.

Tables removed where:

BACK\_LKP\_ORGANIZATION  
 BACK\_ORGANIZATION  
 LKP\_OBJECT\_2CHAR\_BACKUP  
 LKP\_OBJECT\_3CHAR\_BACKUP  
 LKP\_OBJECT\_4CHAR\_BACKUP  
 LKP\_OBJECT\_GROUP\_BACKUP  
 LKP\_ORGANIZATION\_BACKUP  
 LKP\_ORGANIZATION\_TEMP  
 ORGANIZATION\_BACKUP  
 SFA\_POSTED\_SIDE\_BACKUP

**Activity**

**ID:** 292 - Missing Log file for 12/21/01

**Request** Bug Fix **Priority** Medium **Assigned** Lisa Phillips  
**Open Date:** 12/21/2001 9:37:00 AM **Requestor** Lisa Phillips  
**Target Date:** 1/15/2002 **Estimated Effort** 0  
**Closed** **ApplicationType:** CFO DataMart

**Description**

Missing log file for 12/21/01 load.

**Resolution:**

**Activity**

12/21/01 (LP): contacted Michelle Briscoe and left a message telling her to ftp files to server for daily load.



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### FP Data Mart Operations Status

#### *Work Accomplished During This Period*

- Completed monthly FP load for November.
- 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 December.
- Continue Microstrategy reporting enhancements.
- Continue to provide daily monitoring of FP Data Mart.
- Continue issue resolution for open FP requests.



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### Help Desk Monthly Throughput (FP)

#### Bug Fix

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

#### Prod. Support

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

#### Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	1	1	5	7
New	1	0	1	2
Closed	0	0	0	0
End of Month Balance	2	1	6	9

#### Phase II Requests

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



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### Help Desk Request Summary (FP)

Total Requests: 20

ID	Status	Request	Title	Priority	DateOpened	DateClosed
230	Open	Bug Fix	Login before projects are displayed	High	9/6/2001	
227	Open	Bug Fix	Page-by area not working as expected	Medium	6/4/2001	
228	Open	Bug Fix	Search for Lender by name	Medium	6/4/2001	
280	Open	Bug Fix	Problem with Part IV	Medium	11/15/2001	
78	Open	Enhancement	799 Reports	High	6/6/2001	
291	Open	Enhancement	Consolidation Holder Report	High	12/14/2001	
202	Open	Enhancement	Inactive Lender Report	Low	8/22/2001	
203	Open	Enhancement	Region Re-Work	Low	8/22/2001	
255	Open	Enhancement	Element List Prompts for Documents	Low	9/18/2001	
279	Open	Enhancement	Use Address Info for Parent Lender	Low	10/31/2000	
283	Open	Enhancement	Ahmad Usmani wants view access to the schema objects	Low	11/16/2001	
296	Open	Enhancement	Replace SFA Logo on MSTR Web Site	Low	12/7/2001	
81	Open	Enhancement	1189 /1130 Reports	Medium	6/7/2001	
80	Open	Phase II	Drill to multiple templates in report - E32	Low	7/28/2001	
88	Open	Phase II	New Report needed (ED form 799) - E18	Low	6/14/2001	
293	Closed	Prod. Support	Willie Sutton Lost Access to Datamart	High	12/4/2001	12/4/2001
295	Closed	Prod. Support	Reset Mark Taylor's Password	High	12/10/2001	12/10/2001
297	Closed	Prod. Support	Change Linda Elrod's User ID	High	12/20/2001	12/20/2001
157	Open	Prod. Support	Data Mart users loose access when NT patches are installed	Low	7/18/2001	
294	Closed	Prod. Support	Change Emanuel Bundy's User ID	Medium	12/4/2001	12/4/2001



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### Help Desk Request Details (FP)

**Total Requests: 20**

**ID:** 78 - 799 Reports

<b>Request</b>	Enhancement	<b>Priority</b>	High	<b>Assigned</b>	Mark Mandrella
<b>Open Date:</b>	6/6/2001 12:00:00 PM	<b>Requestor</b>	Paul Sullivan		
<b>Target Date:</b>	2/1/2002	<b>Estimated Effort</b>	0		
<b>Closed</b>		<b>ApplicationType:</b>	FP DataMart		

#### Description

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.

11/19/01- Reassigned to Mark.

11/27/01 (Mark Mandrella): currently working to resolve a server issue preventing the creation of documents.

12/11/01 (Bob Audet) Emailed Benson Hwang, the NT Administrator of SFANT001 and SFNT004 machines, for (1) shared directory information (I.e., name of shared directory, who has access, what type of access do these users have) and (2) if the Intelligent Server service is running as a system account or a



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

**Request** Phase II **Priority** Low **Assigned** Tina Liu  
**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.

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

**ID:** 81 - 1189 /1130 Reports

**Request** Enhancement **Priority** Medium **Assigned** Mark Mandrella  
**Open Date:** 6/7/2001 12:00:00 PM **Requestor** Chiu/Duffin  
**Target Date:** 2/1/2002 **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.



## Task Order 75 - Data Mart Operations

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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.

11/19/01- Reassigned to Mark.

11/27/01 (Mark Mandrella): currently working to resolve a server issue preventing the creation of documents.

12/11/01 (Bob Audet) Emailed Benson Hwang, the NT Administrator of SFANT001 and SFNT004 machines, for (1) shared directory information (I.e., name of shared directory, who has access, what type of access do these users have) and (2) if the Intelligent Server service is running as a system account or a network account.

12/11/01 (Bob Audet) Changed the issue status to 'Postponed' since a duplicate issue (Issue #255) already

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

<b>Request</b>	Phase II	<b>Priority</b>	Low	<b>Assigned</b>	Tina Liu
<b>Open Date:</b>	6/14/2001 12:00:00 PM	<b>Requestor</b>	Jerry Wallace		
<b>Target Date:</b>	5/1/2002	<b>Estimated Effort</b>	0		
<b>Closed</b>		<b>ApplicationType:</b>	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.

11/29/01 (Bob Audet) Met with the FP Power users yesterday and they still consider this issue most likely a Phase III request. Reassigned to Robert Audet.

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



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

**Request** Prod. Support **Priority** Low **Assigned** Mark Mandrella  
**Open Date:** 7/18/2001 10:00:00 AM **Requestor** Annie Barton  
**Target Date:** 3/1/2002 **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:**

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

**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.

**ID:** 202 - Inactive Lender Report

**Request** Enhancement **Priority** Low **Assigned** Tina Liu  
**Open Date:** 8/22/2001 10:00:00 AM **Requestor** Jerry Wallace  
**Target Date:** 2/1/2002 **Estimated Effort** 0  
**Closed** **ApplicationType:**FP DataMart  
**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.



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

11/20/01 (Annie Barton) Waiting for Jerry's Response. Sent him a reminder email on 11/19/2001.

11/26/01 (Bob Audet) Reassigned to Bob.

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?

11/27/01 (Bob Audet) Sent Jerry a follow-up email regarding this issue for further information that Annie Barton requested.

12/05/01 (Bob Audet) Checked the 'Needs Clarification' status option since we are waiting for user feedback to move forward with this issue. Jerry needs to provide the proper lender criteria.

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

**ID:** 203 - Region Re-Work

<b>Request</b>	Enhancement	<b>Priority</b>	Low	<b>Assigned</b>	Lisa Phillips
<b>Open Date:</b>	8/22/2001 10:00:00 AM	<b>Requestor</b>	Jerry Wallace		
<b>Target Date:</b>	2/1/2002	<b>Estimated Effort</b>	0		
<b>Closed</b>		<b>ApplicationType:</b>	FP DataMart		
<b>Description</b>					

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**

11/19/01- Awaiting clarification from Annie regarding issue- reassiged to Bob

11/29/01 (Bob Audet) Emailed Chirayu Patel to figure out why there are no Informatica sessions that populate the D\_LNDR\_STATE and D\_LNDR\_REGION tables even though mappings exist to populate them and the tabels are used in reports. Chirayu said that the FP users provided a file called Contact List, which was used for a one-time load. Spoke with Nettie Harding and she said tha the FP users need to determine if the relationship between region and state should be removed all together. She will discuss this with the users. (Affects 8 reports: Consolidation Loan Rebate Fee, LID, Origination Fees Bought, Origination Fees Sold, Parent/Lender Address Info, Part II/Part V Disbursement Comparison by loan type, SR Consolidation Loan Fee Payment Analysis, and Summarized Origination Fees Reports)



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12/03/01 (Bob Audet) Changed Status Option to 'Needs Clarification' since awaiting feedback from power users.

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

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

**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:** 2/1/2002 **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.

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

**ID: 228** - Search for Lender by name

**Request** Bug Fix **Priority** Medium **Assigned** Tina Liu  
**Open Date:** 6/4/2001 10:00:00 AM **Requestor** Nancy Krecklow  
**Target Date:** 3/31/2002 **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:**



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### 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

<b>Request</b>	Bug Fix	<b>Priority</b>	High	<b>Assigned</b>	Tina Liu
<b>Open Date:</b>	9/6/2001 10:00:00 AM	<b>Requestor</b>	Annie Barton		
<b>Target Date:</b>	1/15/2002	<b>Estimated Effort</b>	0		
<b>Closed</b>		<b>ApplicationType:</b>	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.

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.



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**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.

**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:** 279 - Use Address Info for Parent Lender

**Request** Enhancement **Priority** Low **Assigned** Tina Liu  
**Open Date:** 10/31/2000 12:00:00 PM **Requestor** Susan Haenel-Beck  
**Target Date:** 1/15/2002 **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.

11/26/01 (Bob Audet) Users need to decide what they want. Reassigned to Bob.

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



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**ID:** 280 - Problem with Part IV

**Request** Bug Fix **Priority** Medium **Assigned** Mark Mandrella  
**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.

**ID:** 283 - Ahmad Usmani wants view access to the schema objects

**Request** Enhancement **Priority** Low **Assigned** Tina Liu  
**Open Date:** 11/16/2001 9:00:00 AM **Requestor** Ahmad Usmani  
**Target Date:** 1/15/2002 **Estimated Effort** 0  
**Closed** **ApplicationType:**FP DataMart



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### Description

Due an issue with MicroStrategy only the Administrator can access the schema objects unless the workaround from TN5300-007-0039 is implemented. Tried to implement the workaround for only FP PowerUsers, but did not work when the Everyone user group was also given access to the schema objects

### Resolution:

### Activity

11/26/01 (Bob Audet) Tried workaround provide by Technote TN5300-007-0039 and it did not work when the Everyone group was added.

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

1/3/2002 (Tina Liu) Tried the workaround provided by Technote TN5300-007-0039 and found out that there is inconsistency in the document (the screenshot is different than what is indicated in the text content). The workaround seems working fine if I follow the text rather than the screenshot. Needs to clarify with Bob for the situation of adding everyone group.

**ID:** 291 - Consolidation Holder Report

<b>Request</b>	Enhancement	<b>Priority</b>	High	<b>Assigned</b>	Mark Mandrella
<b>Open Date:</b>	12/14/2001 10:00:00	<b>Requestor</b>	Nettie Harding		
<b>Target Date:</b>	1/15/2002	<b>Estimated Effort</b>	0		
<b>Closed</b>		<b>ApplicationType:</b>	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) Reassinged to Mark.



## Task Order 75 - Data Mart Operations

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**ID:** 293 - Willie Sutton Lost Access to Datamart

**Request** Prod. Support **Priority** High **Assigned** Mark Mandrella  
**Open Date:** 12/4/2001 9:45:00 AM **Requestor** Willie Sutton  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/4/2001 10:00:00 AM **ApplicationType:**FP DataMart  
**Description**

Willie Sutton cannot log into the datamart

**Resolution:**

reset his password

**Activity**

**ID:** 294 - Change Emanuel Bundy's User ID

**Request** Prod. Support **Priority** Medium **Assigned** Mark Mandrella  
**Open Date:** 12/4/2001 10:15:00 AM **Requestor** Willie Sutton  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/4/2001 10:45:00 AM **ApplicationType:**FP DataMart  
**Description**

Change Emanuel Bundy's FP User IF from 'emebundy' to 'enebundy'

**Resolution:**

changed the ID

**Activity**

**ID:** 295 - Reset Mark Taylor's Password

**Request** Prod. Support **Priority** High **Assigned** Mark Mandrella  
**Open Date:** 12/10/2001 3:40:00 PM **Requestor** Willie Sutton  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/10/2001 3:50:00 PM **ApplicationType:**FP DataMart  
**Description**

Reset Mark E. Taylor's password (User ID: epmetaylor)

**Resolution:**

reset the password

**Activity**



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**ID:** 296 - Replace SFA Logo on MSTR Web Site

**Request** Enhancement **Priority** Low **Assigned** Mark Mandrella  
**Open Date:** 12/7/2001 4:00:00 PM **Requestor** Faitha Flowers  
**Target Date:** **Estimated Effort** 0  
**Closed** **ApplicationType:**FP DataMart

**Description**

We need to replace the SFA logo on the datamart web sites with the new logo.

**Resolution:**

**Activity**

12/7/01: The new logo does not come out until next year. Once released, will handle this request.

**ID:** 297 - Change Linda Elrod's User ID

**Request** Prod. Support **Priority** High **Assigned** Mark Mandrella  
**Open Date:** 12/20/2001 2:15:00 PM **Requestor** Willie Sutton  
**Target Date:** **Estimated Effort** 0  
**Closed** 12/20/2001 2:45:00 PM **ApplicationType:**FP DataMart

**Description**

Change Linda (Stoddard) Elrod's user ID from eplstoddard to enlelrod

**Resolution:**

completed the request

**Activity**