

Task Order 75 - Data Mart Operations

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

Period Ending: 05/31/02



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

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Introduction

This is the May 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 for Production

**Note: Downtime for backups and scheduled outages are not shown

Date	Availability (%)	Notes
Wed - May 1	100%	
Thurs - May 2	100%	
Fri - May 3	100%	
Sat - May 4	100%	
Sun - May 5	100%	
Mon - May 6	100%	
Tues - May 7	100%	
Wed - May 8	100%	
Thurs - May 9	100%	
Fri - May 10	100%	
Sat - May 11	100%	
Sun - May 12	100%	
Mon - May 13	100%	
Tues - May 14	100%	
Wed - May 15	100%	
Thurs - May 16	100%	
Fri - May 17	100%	
Sat - May 18	100%	
Sun - May 19	100%	
Mon - May 20	100%	
Tues - May 21	100%	
Wed - May 22	100%	
Thurs - May 23	100%	
Fri - May 24	100%	
Sat - May 25	100%	
Sun - May 26	100%	
Mon - May 27	100%	
Tues - May 28	100%	



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Date	Availability (%)	Notes
Wed - May 29	100%	
Thurs - May 30	100%	
Fri - May 31	100%	

CFO Data Mart Operations Status

Work Accomplished During This Period

- 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 availability.
- Continue tracking SIRs and production support requests.



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Batch Job Results (CFO)

** Daily batch loads were not resumed during the month of May.

Date Processed	Number of Rows Processed	Notes
Mon- May 1	0	
Tues - May 2	0	
Wed - May 3	0	
Thurs - May 4	0	
Fri- May 5	0	
Sat - May 6	0	
Sun - May 7	0	
Mon- May 8	0	
Tues - May 9	0	
Wed - May 10	0	
Thurs - May 11	0	
Fri- May 12	0	
Sat - May 13	0	
Sun - May 14	0	
Mon - May 15	0	
Tues - May 16	0	
Wed - May 17	0	
Thurs - May 18	0	
Fri - May 19	0	
Sat - May 20	0	
Sun - May 21	0	
Mon - May 22	0	
Tues - May 23	0	
Wed - May 24	0	
Thurs - May 25	0	
Fri - May 26	0	
Sat - May 27	0	
Sun - May 28	0	
Mon - May 29	0	
Tues - May 30	0	
Mon- May 1	0	



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Help Desk Monthly Throughput (CFO)

Bug Fix

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

Enhancement Requests

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

Help Desk

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

Help Desk Request Summary (CFO)

Total Records: 2

ID	Status	Request Type	Title	Priority	DateOpened	DateClosed
163	1	Enhancement	File Layout change	Medium	7/25/2001	
194	1	Enhancement	Automate process of modifying and adding descriptions	High	8/15/2001	



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Help Desk Request Details (CFO)

Total Records: 2

ID: 163 - File Layout change

Request Enhancement **Priority** Medium **Assigned** Tina Liu
Open Date: 7/25/2001 3:15:00 PM **Requestor** Russell Young
Target Date: 3/31/2002 **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.



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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.

12/3/01 (Bob Audet) Set this issue to Postponed since the file layout change may not changed until January

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:	2/20/2002	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 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 Prodcution 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. If Chirayu is available, the update prccess 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'



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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.

1/4/01 (LP): Updated object 2, 3, and 4 ETL mappings in Informatcia on test server. Everything runs fine. Waiting to move to production after speaking with Russell and meeting with Tina.

1/11/02 (LP): Sent a follow up email to Russell for clarification.

1/11/02(LP): Russell's reply: At this time all issues with updating the support data tables need to be put on hold to we figure out what the data will look like from the new FMSS system. All of our efforts need to be focused on changes that maybe needed to accommodate this new data. The Department indicated that they could have this worked out by 2/04. So at this time lets keep this item open.

1/11/02(LP): Changed target date to 2/20 since we are awaiting response from client on 2/4.



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FP Data Mart Operations Status

Work Accomplished During This Period

- Completed monthly FP load for April.
- Provided daily monitoring of FP data mart availability.
- Continued tracking SIRs and enhancement requests.
- Continued to update user login information (add, remove, and reset IDs).
- Completed Data Mart Migrations for FP.
- Held bi-weekly FP Meetings with Power Users.
- Fixed the problem with Part II/Part V Disbursement Comparison.
- Completed Enhancements to the 799 and 1189/1130 Reports.
- Added the 3/31/02 Quarter to the selection list for all reports.

Issues or Anticipated/Current Problems

- None

Planned Work for Next Period

- Continue MicroStrategy reporting enhancements and completion of outstanding SIRs.
- Continue to provide daily monitoring of FP Data Mart.
- Continue to update user login information (add, remove, and reset IDs).
- Continue issue resolution for open FP requests.
- Complete May FP monthly data load.
- Transition to Informatica Power Center v5.1.2.
- Start transition to MicroStrategy v7i.



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Help Desk Monthly Throughput (FP)

Bug Fix

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

Prod. Support

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

Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	1	2	5	8
New	0	0	0	0
Closed	1	1	0	2
End of Month Balance	0	1	5	6

Help Desk

Category	High	Medium	Low	Total
Carry Forward	0	0	0	0
New	8	0	0	8
Closed	8	0	0	8
End of Month Balance	0	0	0	0



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Help Desk Request Summary (FP)

Total Requests: 25

ID	Status	Request	Title	Priority	DateOpened	DateClosed
227	Open	Bug Fix	Page-by area not working as expected	Medium	6/4/2001	
230	Open	Bug Fix	Login before projects are displayed	High	9/6/2001	
280	Open	Bug Fix	Problem with Part IV	Medium	11/15/2001	
334	Open	Bug Fix	Subtotals appearing at top of Report	Low	2/21/2002	
382	Closed	Bug Fix	Problem with Part II/Part V Disbursement Comparison	Medium	5/1/2002	6/2/2002
228	Open	Enhancement	Search for Lender by name	Medium	6/4/2001	
78	Closed	Enhancement	799 Reports - E8	High	6/6/2001	5/10/2002
81	Closed	Enhancement	1189 /1130 Reports	Medium	6/7/2001	5/10/2002
80	Open	Enhancement	Drill to multiple templates in report - E32	Low	7/28/2001	
338	Open	Enhancement	We need to use dynamic quarter prompts	Low	2/22/2002	
342	Open	Enhancement	No Limit for login attempts	Low	3/4/2002	
343	Open	Enhancement	OCIO Password Requirements not met	Low	3/4/2002	
368	Open	Enhancement	Enhance the performance of Active & Inactive Lenders reports	Low	4/15/2002	
381	Closed	Help Desk	Reset Bing Yi's Password	High	5/1/2002	5/1/2002
384	Closed	Help Desk	Create ID's for access to FPDM	High	5/7/2002	5/7/2002
385	Closed	Help Desk	Create ID for Brad Mayer	High	5/9/2002	5/9/2002
389	Closed	Help Desk	Reset User ID for Vincent Clark	High	5/13/2002	5/13/2002
422	Closed	Help Desk	Reset Leslie Richard's Password	High	5/22/2002	5/22/2002
424	Closed	Help Desk	Create FPDM ID for Donald Conner	High	5/23/2002	5/23/2002
440	Closed	Help Desk	Reset John Jebian's FPDM	High	5/29/2002	5/29/2002



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ID	Status	Request	Title	Priority	DateOpened	DateClosed
			Password			
441	Closed	Help Desk	Reset Vincent Clark's Password	High	5/29/2002	5/29/2002
157	Open	Prod. Support	Data Mart users lose access when NT patches are installed	Low	7/18/2001	
390	Closed	Prod. Support	Add 3/31/02 quarter to the selection list	High	5/13/2002	5/23/2002
396	Closed	Prod. Support	Reset Sterling Yoder's Password	High	5/13/2002	5/13/2002



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Help Desk Request Details (FP)

Total Records: 25

ID: 78 - 799 Reports - E8

Request Enhancement **Priority** High **Assigned** Mark Mandrella
Open Date: 6/6/2001 12:00:00 PM **Requestor** Paul Sullivan
Target Date: 2/1/2002 **Estimated Effort** 0
Closed 5/10/2002 5:00:00 PM **ApplicationType:**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 network account.

2/15/02 (Mark M): network problems hampered creation of documents from our desktops here in office.



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Workaround is to create documents on SFANT001 machine (using RCO) and letting users view them using web interface.

2/15/02 (Mark M): created a basic layout of the document and wrote Paul Sullivan to check it out and provide suggestions. Paul called around 1:45pm saying he would be unable to look at the report today, but he is going to be in Washington DC next week and will try to schedule some time so we can look at it together.

Date: ID: 80 - Drill to multiple templates in report - E32
Request Enhancement **Priority** Low **Assigned** Tina Liu
Open Date: 7/28/2001 10:00:00 AM **Requestor** Susan Haenel-Beck
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart
Description

Drill to multiple templates for "Consolidation Load Fee Payment Analysis Report"

Log:
Resolution:

2/21/02 (Mark M): Paul, Mike, and Ben Chiu looked at the report and liked it. One request was to try to move the report name on top of the reports as a header. It currently lists the name at the bottom of each

Activity

report, and it looks like a footer.

8/21/2001 (Annie Barton) Waiting for new release of Microstrategy

3/15/02 (Mark M): modified the report to add headers to the reports on the document and send email to users to review changes 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

1/22/2002 (Tina Liu) Discussed with Ahmad and he suggested to put the request type to Enhancement because we do not know if the Phase II will be using MSTR 7.2 or not.

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 5/10/2002 5:00:00 PM **ApplicationType:**FP DataMart



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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.

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 exists that has been postponed.

2/15/02 (Mark M): network problems hampered creation of documents from our desktops here in office. Workaround is to create documents on SFANT001 machine (using RCO) and letting users view them using web interface.

2/21/02 (Mark M): Paul, Mike, and Ben Chiu looked at the report and liked it. One request was to try to move the report name on top of the reports as a header. It currently lists the name at the bottom of each report, and it looks like a footer.

3/15/02 (Mark M): modified the report to add headers to the reports on the document and send email to



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

Request Prod. Support **Priority** Low **Assigned** Tina Liu
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 lose 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.

1/23/2002 (Tina Liu) Reassigned to Tina.

1/29/2002 (Tina Liu) Called MSTR Tech Support and logged a new issue #156885. Needs to verify on I-server version (7.1 had this bug but was fixed in newer versions) Left a message on Benson's answer machine.

1/30/2002 (Tina Liu) The I-server version is actually 7.1, so it is an known issue for MicroStrategy. This bug is fixed on 7.1.1. We will need to wait until the upgrade to 7.2 to have this issue fixed because no other intermediate upgrade is planned for now. Remove the target date for now.

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: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart
Description



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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.

1/4/2002 (Tina Liu) After discussing with Tom, this bug fix is postponed to after MSTR 7.2 release.

ID: 228 - Search for Lender by name

Request	Enhancement	Priority	Medium	Assigned	Tina Liu
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.

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.

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.



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ID: 230 - Login before projects are displayed

Request Bug Fix **Priority** High **Assigned** Tina Liu
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.

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.

1/11/2002 (Tina Liu) Sent email to Nettie Harding for action update.

1/18/2002 (Tina Liu) called Nettie to clarify the status and then called Tech support, logging two issues: 155688 for desktop password expiration reminder and 155689 for web login twice. Tech support for issue 155689 provided a resolution: log in as Administrator, click on a project -> preferences -> Project defaults -> Project display and change the Project list selection from "Show all the projects connected to the Web Server before the user logs in" to "Log in, then show the projects accessible by the supplied login". This setting will not hold after user logs out and then relogin after a while. Reset the target date to 2/1/2002.

1/22/02 (Tina Liu): The preference setting on production server was actually successful after rechecking it today. But the dev web server reported error: "Error Saving Personal Preferences. Your project default preferences could not be saved. Your permissions on the Web folder or in its contents may be incorrect". MSTR Tech Support provided two tech notes "TN5600-7X0-0304" and "N5600-7X0-0142" to tackle this issue. Sent email to Benson Hwang for the security property setting of file AdminOptions.xml on dev server. Benson changed the setting to allow changes, now it works on dev server as well.

1/29/02 (Tina Liu): The login and projects setting works fine with MSTR Web 7.1.2 version but is not stable for the 7.1 version. For the password expiration problem, MSTR Tech support is still investigating on it. For now, run scripts in MSTR Command center to gather user profiles and run a java program



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accenture.modpartner.datamart.FileTransform to change the format of the user profile files to be sorted in ascending order based on the password expiration time and put properties of the same user into one row, which may later be exported to an Excel file and sent to Willie Sutton. The first file generated on today has already been sent to Willie to review.

1/30/2002 (Tina Liu): MSTR Tech Support sent email confirming that the password expiration problem has been fixed for MSTR Web release 7.2, which is scheduled to come in late Q1/2002 or early Q2/2002. Change the status to be postponed until the next upgrade to MSTR 7.2.

2/11/2002 (Tina Liu): Figured out the unstable setting problem is indeed a dual-web server issue. When the setting was changed, it was only applied to one of the web servers, this is why we may observe different behavior for the default page. Set to use "Login.asp" for both web servers. The password expiration problem will still occur. Needs to remind users to use "Projects.asp" to change password when it is reset by the administrator to force change of password at next login.

ID: 280 - Problem with Part IV

Request	Bug Fix	Priority	Medium	Assigned	Tina Liu
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).



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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.

2/5/02 (Mark M): SIR is postponed while users do a data review. Here is the email from Susan:

The duplication of data was caused by multiple 799's and the way E-Systems processed the data. There are a limited amount of borrowers affected and Angela was trying to quantify the problem so that data corrections could be made. It is still at that point. I will follow-up with Angela on this.

2/7/2002 (Tina Liu): Tried a workaround for this case using the following formula to calculate the affected metrics: (Original metric calculation)/Count <distinct=True>(Processing Date) {~+}. Sent email to Nancy, Ahmad, CC to Susan and Mark for opinions. The following is the email replied by Susan:

"Tina: I'm not sure if this will work. I have left you a voice mail message so we can discuss it further. I don't want to be difficult on this but I think the fix may cause further damage. Here is my research and my thoughts.....

For the most part, if a form is processed and then reprocessed, the first form usually does not have any balances and the second one is the "real" form, thus, the correct data overlays in the datamart. This is the norm on resubmissions from what I can gather. In some cases, there may be balances reported but with no payment information - that is contained in the second form - which is what occurred here. Will this manner of handling multiple forms negate the first submission automatically? (We may not want that.)

Just a side note - I've been told that this particular problem is only caused by a small number of lenders and is the result of incorrect coding by E-systems in Part IV only. The forms were reprocessed by ED to correct errors but, for some reason, the initial submission was not "zeroed" out in Part IV. Perhaps we need to get somebody involved with 799 processing to give us a background information? Right now, I am still waiting for the error to be quantified and should have more information on Monday.

I'm concerned also because data that will be processed in the new LaRS system will allow for multiple entries/submissions. Will this impact on how ALL multiple submissions are processed?

I think we need to review how this change will impact the future processing as well as affected lenders which were keyed correctly - in this case, the change may be worse than having a few duplicates.

I'm cc'ing Willie Sutton on this message as he has also been asking me about this. "

After discussing with Susan over the phone, sent out the following email to her and other related people.

"

Just a brief summary for our discussion over the phone:



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1. At your end, investigation is still going on to identify those lenders who has this problem for their 799 form Part IV.
2. At this point, we are not sure what fields can be duplicate. For the lender you have discovered, duplicate fields are "Ending Principal Balance" and "Avg. Daily Principal Balance" for Part IV of 799, but it is also possible that the payment field is duplicate but not the others.
3. It is the best if we can correct the E-processing problem and prevent any future "breakout" on the same issue.
4. Another alternative is that after qualifying and quantifying the problem, we add some conditions for those special cases to the affected metrics calculation. For example, if lender ID = <the lender ID that has the problem> and Fiscal Quarter ID = < the quarter ID that has the problem> then calculate the affected metrics in a different way (as suggested in the workaround), for other cases, keep the original calculation intact.

Susan will have a conference call with Angela on Monday, then we will discuss this issue again in FP Data Mart Release 2 meeting next Tuesday.

2/20/02 (Tina Liu) Reassigned to Tina. Discussed with Susan for possible workaround. Added one column of "Processing Date" to the report and put it on Enhancement\ID280 for Susan and related clients to review.

2/27/02 (Tina Liu) Susan sent email suggesting the following fix:

"

In many of the reports we use in "lender-other reports," there is a comparison of parts using summary data...this is a general statement. In those cases, processing date data would be nice so that a user could tell if, for example, any numeric errors may be caused by multiple submissions.

However, on the "lender reports" reports, most of that is straight data configured in a report format, i.e. no comparisons or analysis. Couldn't we just list the ON and SN documents separately by processing date....here is an example:

QTR	Processing Date	Ending Prin	Avg Prin	Amt Paid
3/01	2/22/01	10000	5000	10.00
3/01	2/28/01	200	175	5.00

Therefore, if there was another ending balance on the report (or average if we think that easier), a separate quarter entry would be made.

"

Sent reply to Susan:

"

Thanks for the clarification. If my understanding is correct, you want all affected reports to have "Processing Date" shown up on the report. But for the "Lender Reports" or so called straight reports, do you also want document type "ON" and "SN" shown up as well?

"

Got reply:



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"do the G/L Comparison report in Lender-Other Reports and Part IV and Part II, in Lender Reports. "

2/28/02 (Tina Liu): Put three reports on enhancement folder and sent email to Susan to verify.

ID: 334 - Subtotals appearing at top of Report

Request Bug Fix **Priority** Low **Assigned** Lisa Phillips
Open Date: 2/21/2002 12:26:00 PM **Requestor** Susan Hannelbeck
Target Date: **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

When running the Part II and Part III reports from the web the totals are displayed at the bottom of each lender. When moving the "Quarter Ending Date" from the columns to rows, the subtotals now appear at the top of each lender.

Resolution:

Activity

2/21 (LP): In a meeting with the power users it was discussed that we move the Qtrs from the column to the rows in template to fix the problem.

2/21(LP): Could not move the Qtrs from the column to rows. Error still occurs. This is a problem with MSTR 7.1 but has been identified for the next release: This note is from their support site:

Defects and enhancements addressed in MicroStrategy 7 7.1.3

MicroStrategy Agent 7.1.1 TS Case 141024 Subtotals are always displayed at the top if attributes are sorted

Sent an email to Susan: Susan,

I have been working on these two reports and moving the Quarter from the rows to columns and this has not solved the problem. We have determine that this is a bug with MSTR 7.1 after reviewing the known bugs from their support website (see below). This issue will be resolved in the next release so I am going to postpone this request.

Thanks,

Lisa



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ID: 338 - We need to use dynamic quarter prompts

Request	Enhancement	Priority	Low	Assigned	Tina Liu
Open Date:	2/22/2002 9:07:00 AM	Requestor	Tina Liu		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

Some quarter prompts in FP data mart use a pre-selected element list with the ending quarter of September 2001 (or December 2001) should be changed to be dynamic prompts that will include only those valid quarters that appear in the related fact source table(s).

Resolution:

Activity

2/22/2002 (Tina Liu): Opened the issue and assigned to Tina. This is postponed due to a bug with MicroStrategy Web 7.1 (it does not support set qualification type of filter). Should be fixed in 7i release on March-April time frame.

ID: 342 - No Limit for login attempts

Request	Enhancement	Priority	Low	Assigned	
Open Date:	3/4/2002 8:15:00 AM	Requestor	Nancy Krecklow		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

There is no limit to the number of invalid access attempts that may occur for a given user on the CMDM (or any datamart).

Case entered with Microstrategy (#160279)

Resolution:

Activity

ID: 343 - OCIO Password Requirements not met

Request	Enhancement	Priority	Low	Assigned	
Open Date:	3/4/2002 8:15:00 AM	Requestor	Nancy Krecklow		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

Password requirements do not adhere to the minimum OCIO requirements in terms of length and composition (8 characters consisting of 1 capital and 1 numeric character)



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Microstrategy Case #160279

Resolution:

Activity

ID: 368 - Enhance the performance of Active & Inactive Lenders reports

Request	Enhancement	Priority	Low	Assigned	Tina Liu
Open Date:	4/15/2002 9:25:00 AM	Requestor	Tina Liu		
Target Date:	4/19/2002	Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

Current reports (Active & Inactive Lenders in "Lenders - Other Reports" folder) may take a long time to run. A new approach has been discovered, which needs to apply to both reports. Meanwhile, the prompt of last fiscal quarter ID may need to be taken out of the report. The last fiscal quarter ID can be got from the new lookup table LKP_LOAD_DATE.

Resolution:

Activity

4/15/02 (T.Liu): Opened the issue and assigned to Tina.
 4/22/02 (T.Liu): Generated four reports for power users to review. Two still contain last fiscal quarter ID prompt but are improved on performance, the other two removed the prompt but sacrifice some performance. Power users should send in their opinions by the COB Wednesday.

ID: 376 - Ad-hoc FMS Change Request

Request	Phase II	Priority	Low	Assigned	Tina Liu
Open Date:	4/23/2002 2:09:00 PM	Requestor	Ahmad Usmani		
Target Date:		Estimated Effort	0		
Closed		ApplicationType:	FP DataMart		

Description

Determine status of FMS change request to support post-approval adjustments, and submit a new change request if necessary. --This is an Ad-hoc request that was asked to be logged. If the need arises, we will be notified to complete the task.

Resolution:



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Activity

ID: 381 - Reset Bing Yi's Password

Request	Help Desk	Priority	High	Assigned	Mark Mandrella
Open Date:	5/1/2002 9:45:00 AM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	5/1/2002 1:45:00 PM	ApplicationType:	FP DataMart		

Description

Please reset the production FPDM access password for:

NAME: Bing Yi
 USERID: epbyi
 PHONE: 202-377-3583
 EMAIL: bing.yi@ed.gov

Resolution:

reset password and notified Bing of the reset. He had to call to get the new password.

Activity

ID: 382 - Problem with Part II/Part V Disbursement Comparison

Request	Bug Fix	Priority	Medium	Assigned	Mark Mandrella
Open Date:	5/1/2002 2:00:00 PM	Requestor	John Jebian		
Target Date:		Estimated Effort	0		
Closed	6/2/2002 1:00:00 PM	ApplicationType:	FP DataMart		

Description

Some time last year, I sent an email stating that there was a problem with the Part II/Part V Disbursement Comparison report on Data Mart. For some reason, FI loans were incorrectly included in the comparison. I know that there was some discussion when I first sent the email, but nothing was ever corrected. With reviews starting to take place, several reviewers have approached me to report the error. Can this be fixed before we train the GAs in July?

Resolution:

Activity

5/1/02 (Mark M): we do not have a record of this SIR being reported last year (as stated by John).

5/3/02 3:00pm (Mark M): placed the new version of the report with the fixes on the development site and emailed John Jebian about it. I asked him to verify the changes are OK so we can migrate the report to production.

5/13/02 10:30am (Mark M): emailed John again to remind him to verify the corrected report is indeed correct and can be moved to production.



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5/14/02 (Mark M): John approved changes and will be put in production on 6/2 CR #14

ID: 384 - Create ID's for access to FPDM

Request Help Desk **Priority** High **Assigned** Mark Mandrella
Open Date: 5/7/2002 9:00:00 AM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 5/7/2002 9:15:00 AM **ApplicationType:**FP DataMart

Description

Please establish an access account to the FP Data Mart production (fp-mart.sfa.ed.gov/microstrategy7/projects.asp) environment for:

NAME	LOGON-ID	DESCRIPTION
Kitty Wooley	epkwooley	OFSAP, UCP062D6, x202-377-3154, kitty.wooley@ed.gov
Kriste M. Jordan	epkjordan	OPE, UCP084B4, 202-377-3191, kriste.jordan@ed.gov

Please notify the users and advise me, when the accounts are established.

Resolution:

created the ID's.

Activity

ID: 385 - Create ID for Brad Mayer

Request Help Desk **Priority** High **Assigned** Mark Mandrella
Open Date: 5/9/2002 1:15:00 PM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 5/9/2002 2:30:00 PM **ApplicationType:**FP DataMart

Description

Please establish an access account for the production environment of the FP Data Mart for:

NAME	USERID	DESCRIPTION
Brad Mayer	enbmayer	Schools Channel/Research & Publications, 202-377-4293

Resolution:

Activity

ID: 389 - Reset User ID for Vincent Clark

Request Help Desk **Priority** High **Assigned** Mark Mandrella
Open Date: 5/13/2002 10:50:00 AM **Requestor** Willie Sutton



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Target Date: 5/13/2002 10:55:00 AM **Estimated Effort** 0
Closed **ApplicationType:**FP DataMart

Description

Please reset the production FP Data Mart access password for:

NAME: Vincent Clark
 USERID: epvclark
 PHONE: 212-637-0791
 EMAIL: vincent.clark@ed.gov

Resolution:

Activity

ID: 390 - Add 3/31/02 quarter to the selection list

Request Prod. Support **Priority** High **Assigned** Mark Mandrella
Open Date: 5/13/2002 11:32:00 AM **Requestor** Susan Haenel-Beck
Target Date: 5/17/2002 **Estimated Effort** 0
Closed 5/23/2002 8:05:00 AM **ApplicationType:**FP DataMart

Description

Add 3/31/02 quarter to the drop down selection box on all reports.

Resolution:

Activity

5/13/02 2:00pm (Mark M): changed the 'Select the appropriate Report Fiscal Quarter" prompt to include Mar 21 2002 Fiscal quarter. Emailed Susan to verify prompt works as desired in reports that use the prompt.

ID: 396 - Reset Sterling Yoder's Password

Request Prod. Support **Priority** High **Assigned** Mark Mandrella
Open Date: 5/13/2002 3:00:00 PM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 5/13/2002 3:30:00 PM **ApplicationType:**FP DataMart

Description

Please reset the production FPDM access password for:

NAME: Sterling Yoder
 USERID: epsyoder
 PHONE: 718-488-3531
 EMAIL: sterling.yoder@ed.gov



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Resolution:

Activity

ID: 422 - Reset Leslie Richard's Password

Request Help Desk **Priority** High **Assigned** Mark Mandrella
Open Date: 5/22/2002 4:00:00 PM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 5/22/2002 4:30:00 PM **ApplicationType:**FP DataMart
Description

Please reset the production FP Data Mart access password for:

NAME: Leslie Richards
 USERID: eplrichards
 EMAIL: leslie.richards@ed.gov
 PHONE: 415-556-4108

Resolution:

Activity

ID: 424 - Create FPDM ID for Donald Conner

Request Help Desk **Priority** High **Assigned** Mark Mandrella
Open Date: 5/23/2002 11:00:00 AM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 5/23/2002 11:15:00 AM **ApplicationType:**FP DataMart
Description

Please establish a production FPDM access account for:

NAME	USERID	DESCRIPTION
DONALD CONNER	epdconner	Policy & Budget, K Street, 8081, 202-502-7818

Resolution:

set up ID to access FPDM

Activity

ID: 440 - Reset John Jebian's FPDM Password

Request Help Desk **Priority** High **Assigned**
Open Date: 5/29/2002 11:00:00 AM **Requestor** Willie Sutton
Target Date: **Estimated Effort** 0
Closed 5/29/2002 1:00:00 PM **ApplicationType:**FP DataMart



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Description

Please reset the FPDM production environment access password for:

NAME: John Jebian
USERID: epjjebian
PHONE: 605-622-4308 (temporary)
EMAIL: john.jebian@ed.gov

Resolution:

Activity

ID: 441 - Reset Vincent Clark's Password

Request	Help Desk	Priority	High	Assigned	Mark Mandrella
Open Date:	5/29/2002 12:30:00 PM	Requestor	Willie Sutton		
Target Date:		Estimated Effort	0		
Closed	5/29/2002 1:00:00 PM	ApplicationType:	FP DataMart		

Description

Please reset the FPDM production environment access password for:

NAME: Vincent Clark
USERID: epvclark
PHONE: 212-637-0791
EMAIL: vincent.clark@ed.gov

Resolution:

Activity