

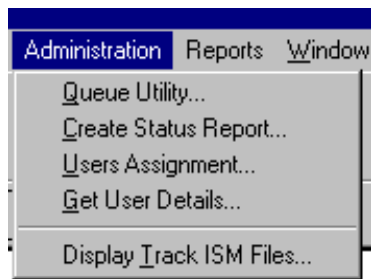
Mosaix

ViewStar System Administration News

Wandsworth - March 1999

General

Four Client Officers teams process all folders pertaining to Housing Benefits. The teams are named Blue, Green, Red and White. Each Officer is assigned a range of Unique Property Numbers (UPRNs); thereby each is offered an approximate equal share of the workload. Each team has a nominated Team Leader and a Deputy. A unique UPRN range is allocated to a so-called Workgroup (or Subgroup), also equivalent to one Client Officer. The Team leader and the deputy are assigned the entire UPRN range that is allocated to their team. Configuration of this work assignment is controlled via a menu option found in the "Browse" application, under the Administration menu, named "**Users Assignment...**". The "Browse" application is available only to users associated with the System Administration profile.



Selecting the "Users Assignment..." option, displays the following "Users Work Distribution" dialog:

A screenshot of a dialog box titled "Users Work Distribution". It has a toolbar with icons for "Done", "Report", "Commit", "Add", "Remove", "Modify", and "Clear". Below the toolbar, there are two dropdown menus: "Group" (set to "Blue") and "User" (empty). To the right of these is a table titled "Work assignment" with four columns: "User ID", "Sub", "From UPRN", and "To UPRN". The table contains ten rows of data for different users. At the bottom of the dialog is a scrollbar.

User ID	Sub	From UPRN	To UPRN
BEARDJ	01	00000000000001	00022769999999
THOMPSONM	02	00000000000001	00022769999999
WARNERK	04	00011840000000	00013499999999
HABELR	05	00013500000000	00015259999999
JONESD	06	00015260000000	00017319999999
CHAMBERSJ	07	00017320000000	00018879999999
NEYSMITHU	08	00018880000000	00020399999999
SCIPIOD	09	00020400000000	00021399999999
NELSONI	10	00021400000000	00022769999999
SAMUELSS	33	00000000000001	00011839999999

The "Users Work Distribution" dialog controls the contents of two new tables that were added under the PRES DAT database. These are BRGSU (Group-Subgroup-User) and BRWDT (Work Distribution Table). Several integrity checks are incorporated, disallowing multiple rows for the same user, or subgroup. The list of users is picked up from "Security". The UPRNs entries must be 14-character in length. Work assignment is defined and committed per team.

A report containing a list of all Housing Benefits officers and their UPRN range allocation is generated when the Report button is clicked. This report is saved to a text file in the local temporary sub-directory, "C:\TEMP\VSUSRWRK.TXT". This file can be printed, using either Notepad or Write, preferably using a fixed-pitch font (if using Notepad, suggest go to Options and untick Proportional font).

The following is a sample of this file:

```

Users Work Allocation Report
Generated by: System Administrator - 30 March 1999  10:07:55
=====

```

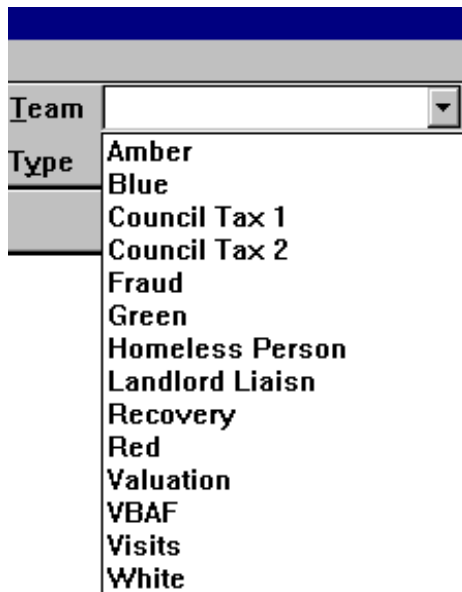
Group	Sub	From UPRN	To UPRN	User ID	Full Name
Blue	01	000000000000001	000227699999999	BEARDJ	Julie Beard
Blue	02	000000000000001	000227699999999	THOMPSONM	Michelle Thompson
Blue	03	000000000000001	000118399999999	SAMUELSS	Stephanie Samuels
Blue	04	000118400000000	000134999999999	WARNERK	Kelvin Warner
Blue	05	000135000000000	000152599999999	HABELR	Ruth Habel
Blue	06	000152600000000	000173199999999	JONESD	Daffydd Jones
Blue	07	000173200000000	000188799999999	CHAMBERSJ	Joanne Chambers
Blue	08	000188800000000	000203999999999	NEYSMITHV	Venice Neysmith
Blue	09	000204000000000	000213999999999	SCIPIOD	Daenson Scipio
Blue	10	000214000000000	000227699999999	NELSONI	Ivorine Nelson
Green	01	000227700000000	000337399999999	SHARPEL	Lorna Sharpe
Green	02	000227700000000	000337399999999	VEALR	Rhian Veal
Green	03	000227700000000	000238999999999	ROBERTSA	Anthony Roberts
Green	04	000239000000000	000252399999999	YOUNGJ	Jacqueline Young
Green	05	000252400000000	000265799999999	VACANT	Vacant
Green	06	000265800000000	000276599999999	KINGN	Nicola King
Green	07	000276600000000	000289399999999	ALAOY	Yemi Alao
Green	08	000289400000000	000304999999999	KWERIT	Theresa Kweri
Green	09	000305000000000	000325099999999	SMITHH	Heather Smith
Green	10	000325100000000	000337399999999	LAVAGNAC	Clive Lavagna
Red	01	000496800000000	000699999999999	REGANT	Tommy Regan
Red	02	000496800000000	000699999999999	GYAMPOHY	Yvonne Gyampoh
Red	03	000476800000000	000512899999999	GULLEYP	Paul Gulley
Red	04	000512900000000	000534799999999	DUNCANS	Sandra Duncan
Red	05	000534800000000	000549999999999	MACFOYP	Phoebe Macfoy
Red	06	000550000000000	000565599999999	ODONOGHUEM	Mike ODonoghue
Red	07	000565600000000	000580999999999	SMYR	Robert Smy
Red	08	000581000000000	000609199999999	HOGANJ	Janet Hogan
Red	09	000609200000000	000627599999999	SIBANDAT	Thandi Sibanda
Red	10	000627600000000	000699999999999	MEADEV	Vicky Meade
White	01	000337400000000	000496799999999	LAWRENCEM	Marjorie Lawrence
White	02	000337400000000	000496799999999	ATKINSONR	Rebecca Atkinson
White	03	000337400000000	000356199999999	NARAINEC	Colin Naraine
White	04	000356200000000	000378999999999	PATELV	Vicky Patel
White	05	000379000000000	000398999999999	FORDJ	Jacqui Ford
White	06	000399000000000	000413599999999	ESSOPK	Kerry Essop
White	07	000413600000000	000432799999999	SMITHA	Angela Smith
White	08	000432800000000	000448599999999	SIMPSONJ	Jacqueline Simpson
White	09	000448600000000	000475799999999	CALLANDERG	Greg Callander
White	10	000475800000000	000496799999999	THOMASJ	Jennifer Thomas

Indexing

When clicking the Search button a list of possible matches is offered to the indexer. When selecting the appropriate match, data is added to attribute fields in the data panel. Depending upon the UPRN the Team attribute is set to one of the Home Benefits teams name, Blue, Green, Red or White. The Workgroup attribute is set to a two-digit number, e.g. 03, 04, 05, etc. Team Leaders are assigned to workgroup 01 and deputies to 02, therefore Client Officers are assigned to Workgroups 03, 04, 05, etc. Unless another Team is selected by the indexers, which will override this initial decision, folders forwarded from the Indexing application are routed to the nominated Housing Benefits Team's queue.

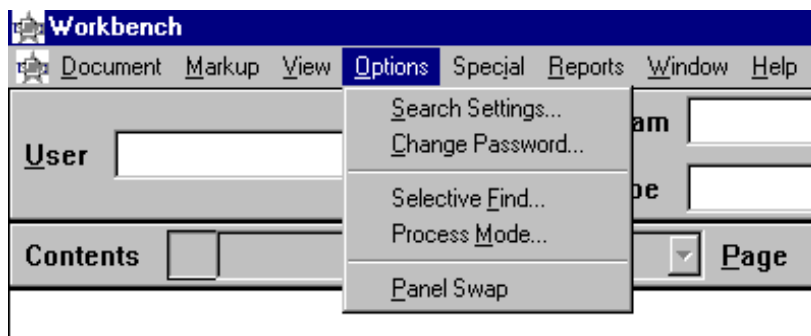
HB Ref No.	172964
CTAX Ref No.	
UP Ref No.	00045340128015
Surname	CARUANA
Forename	ROSE
Title	MRS
Address Line 1	FF/SF
Address Line 2	128 PLOUGH ROAD
Address Line 3	LONDON
Address Line 4	
Post Code	SW11 2AL
N.I. No.	
N.I. No.2	
D.O.B.	
Team	White
WorkGroup	09
Folder Type	

Folders that do not contain Housing Benefits documents must be indexed to other teams. When a team is selected from the Teams combo box, displayed on the top left hand side, the team's name is set in the Team attribute and the Workgroup is set to 0.



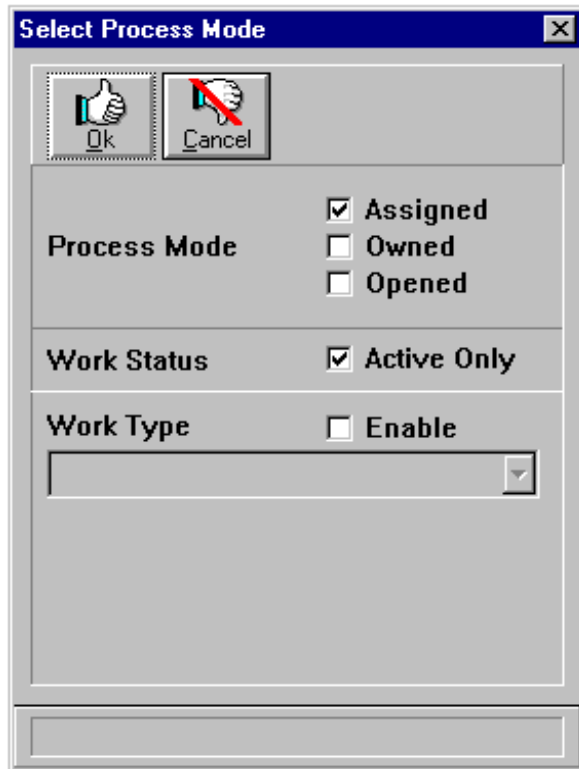
Workbench

Two new menu options were added to the "Options" menu, that is "Selective Find..." and "Process Mode...". A combination of the settings offered by these options defines the search criteria that is applied to "Find" when the "Search" button is clicked, in the "Locate Tracked Workpacket" dialog.



Process Mode...

Workbench may be operated in one of three Process modes, "Assigned", "Opened" or "Owned". The "Assigned" mode is offered by default when Workbench is started-up. The "Select Process Mode" dialog provides the means to select any of the three Process Modes. Also optional is a selection of the Work Status. When ticked, only those work-packets that are "Active" (still in the workflow) are listed, otherwise both "Active" and "Done" work-packets will be listed as a result of Search. The "Find" search can also be bound by a selected Work Type, if the Work Type Enable is ticked and a Work Type is selected from the combo box.



In "Opened" mode the search criteria is "ReqID > 0", i.e. all folders as per selected Work Status and / or Work Type are listed.

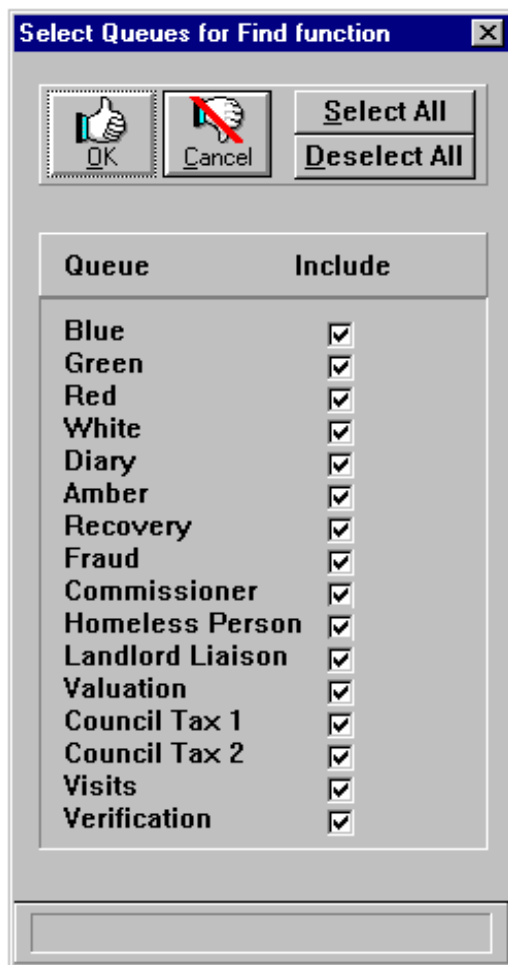
In "Owned" mode the search criteria is "User" = <currently selected User ID>, therefore only folders that were referred to the currently selected user (see Users combo box) will be listed.

In "Assigned" mode only folders that were assigned to the currently selected user are listed. In this mode the search criteria for Housing benefits teams is by a UPRN range, assigned to the selected user; where <userID> is the user that is selected from the "User" combo box (the top left hand side of the Workbench window); for other teams the search criteria is "Team = <currently selected Team>".

Note: When "Workbench" starts-up the User and Team combo-boxes display the logging in user name and the team that the user is associated with. If necessary another Team and/or User may be selected thereby resetting the Process Mode to it's defaults and applying the assigned criteria (UPRN range or Team) for opening the "Next" folder or Search using "Find".

Selective Find ...

The "Locate Tracked Workpacket" folders Search button initiates, by default a search into the systems tracking tables, therefore offering a set of folders that are located in any of a pre-defined set of queues. These are configured through the ..\VS_BIN\BRCOM.INI file, section [Trackingfolders] entry "validqueues". This list contains names of most queues, excluding only the Exceptions, Indexing and the Rescan queues. A further selection from this list is offered to the users of the Workbench application, through "Selective Find". The selected queues apply additional search criteria to the Search function in the "Find" dialog. This selection nominates the list of queues that a user's "Find" search function will operate on, thereby allowing users to limit their "view" to the selected queues. In general Housing Benefits Client Officers should limit their view to their team's colour queue. Other teams might be interested in searching in their own team's queue only.



Note: The users setting in the above dialog is saved in "C:\TEMP\BRWBENCH.INI", thus when starting-up Workbench the user's last setting is restored, assuming that it is the same user that last modified these settings on that workstation. If a new user logs in a global setting is used, from ..\VS_BIN\BRCOM.INI under section [TrackingFind] entry validqueues. The following is an example BRWBENCH.INI automatically created in C:\TEMP

```
;Workbench - User local Configuration
[FindQueues]
SYSADM=["BRCOMM" "BRDIARY" "BRBLUE" ]
```

Sort by Priority or Target Date

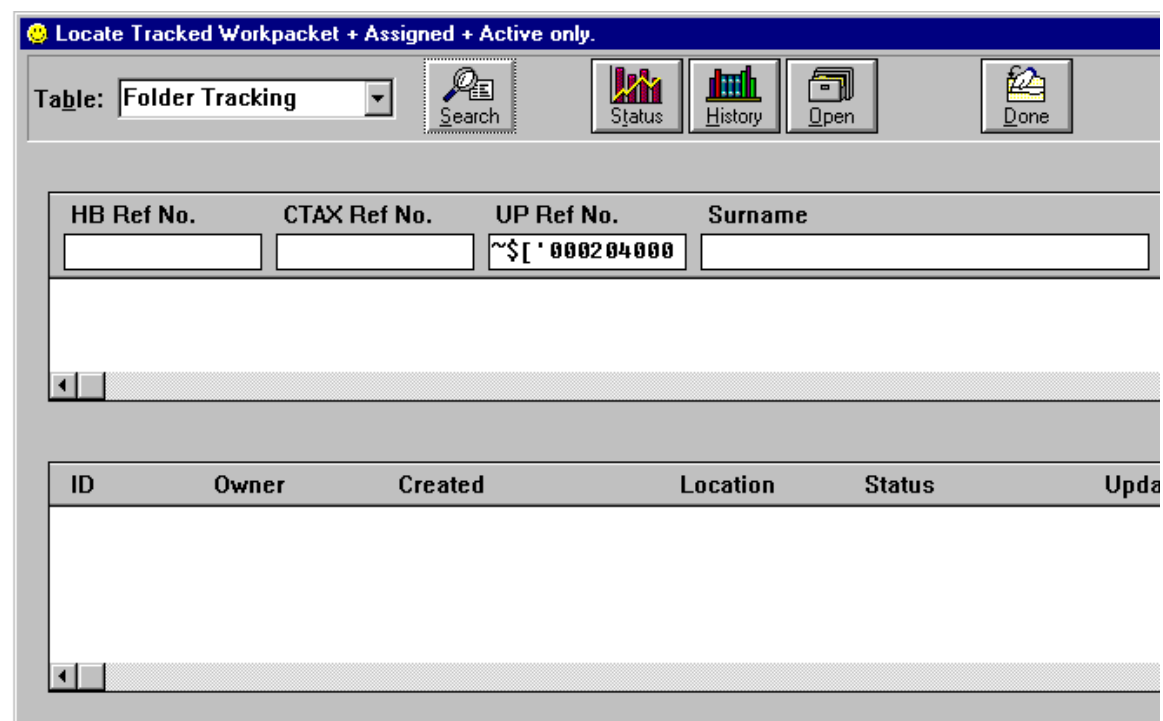
By default the “Priority off” box is not ticked, meaning that a Search triggered by either “Next” or “Find” will apply Priority sorting, i.e. the highest priority folders are opened (in “Next”) or listed on top of the list when using “Find” search. When “Priority off” is ticked the “Find” sort selection is by “Target Date”, i.e. oldest folders or nearest to Target Date folders are listed on top.



Note: Sort Searching in “Find” is controlled only by the “Priority off” tick box. This is so because the Locate Tracked Workpacket list can only be sorted by one column at a time. By default, this list is sorted by Priority, i.e. Highest priority workpacket is listed on top. If “Priority off” is ticked, this dialog will sort the search result list by Target Date.

Sort in “Next” is controlled by both the “Priority off” and the “In Target Only” tick-boxes. By default these are both not ticked, therefore the next folder that will be opened is the one of highest priority. Ticking the “In Target Only” will also add the Target date attribute to sorting for the purpose of opening the next folder.

The following is an example “Find” dialog with UPRN range applied to the search criteria. The title is updated, indicating the current Process Mode and the Search criteria that is applied, in this instance: “Assigned + Active only”.



Reports

The reports menu is in general a tool that will be useful to Managers and Team leaders. Access to the Workbench Report menu options is controlled by user ID, through a list saved in ..\VS_BIN\BRCOM.INI section "Count Folders", entry "Users". The following is an example of this section:

```
[CountFolders]
Users = ["PILGRIMD" "HANSONR" "MATTHEWSF" "PLOWMANT" "SHORET" "SYSADM"]
```

The Users and teams reports accept a "Work Type" selection criteria. These reports contain two columns, one for the "Available folders" and another for "Not available:", i.e. folders that are either opened by other users, or locked by the system or by the System Administrator.

The following is an example "Users Report" in "Opened" mode, therefore showing a count of all folders in the listed queues.

```
Count Users Folders Report
Run by System Administrator at: 12:32:49 30/03/99
Count all folders
```

Queue	Available	Not Available
Blue	1856	3
Green	1889	3
Red	606	2
White	2794	8
Diary	2866	4
Amber	164	4
Recov	536	3
Fraud	219	2
Comm	106	-
HPU	235	1
LLU	4	-
Valuatio	31	-
CTax1	1439	2
CTax2	1546	2
Visits	57	-
VBAF	-	-
TOTALS:	14348	34

The following is an example “Teams Report” for the Green Team:

```
Count Teams Folders Report
Run by System Administrator at: 12:35:29 30/03/99
Count folders assigned to Green Team
```

```
=====
Queue           Available      Not Available
=====
Blue            129              -
Green          1210             3
Red             2               -
White           39              -
Diary           697             -
Amber           31              -
Recov           119             -
Fraud           80              -
Comm            23              -
HPU             23              -
LLU             3               -
Valuatio        6               -
CTax1           534             2
CTax2           2               -
Visits          7               -
VBAF            -               -
=====
TOTALS:         2905            5
=====
```

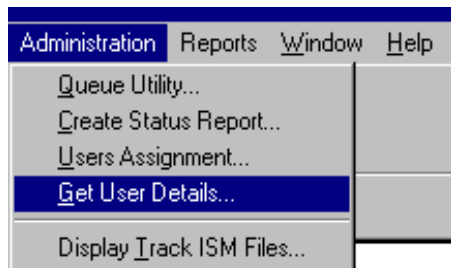
Enquiry

By default, the “Enquiry” application applies a search on all known work-packets, both “Active” and “Done”. The list of queues that “Enquiry” applies it’s search on, is set by the global ..\VS_BIN\BRCOM.INI under section [TrackingFind] entry validqueues. The only search criteria applied by default is “ReqID > 0”. The dialog title is “Locate Tracked Workpacket” and it does not change throughout the use of this Application.

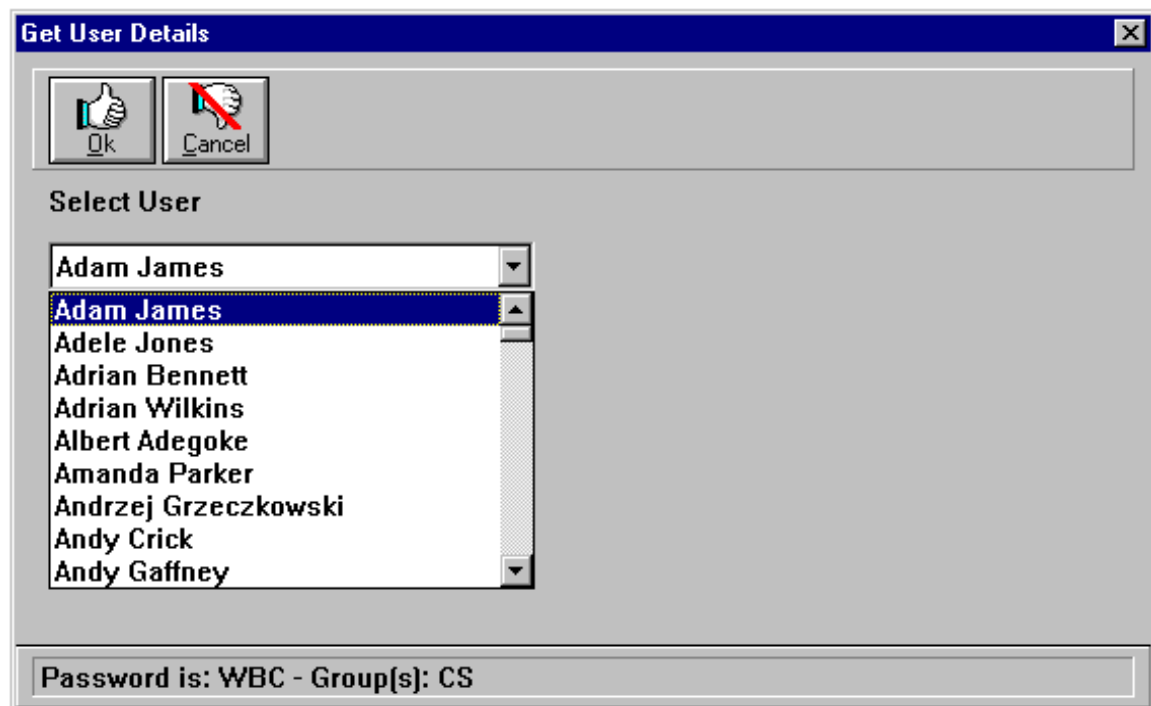
Browse

The Browse Application is accessed exclusively by System Administrators. The new Administration menu option contains a set of System Administration functions.

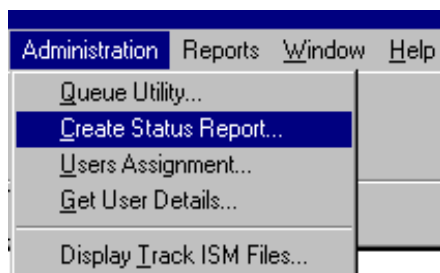
Get User Details - allows inspection of a user's password and group(s).



When Get User Details... is selected from the menu the following is displayed. Selecting a User will display the Password and Group(s) associated with that user.



A Daily Status Report is generated after office hours, automatically scheduled on a Process Agent. A manual run of this same report can be invoked by selecting the "Create Status Report..." option from the Administration menu.



Completing folders in Workbench

Folders that are completed in Workbench may be sent straight to Archive, or to the Commissioner for verification. The routing direction is decided from the "Complete to C.O" tick box. A list of documents types that will disregard this selection is stored in the PRSEDAT database in BRCODOCS table. This table is currently empty, therefore the routing of all completed folders is under user's control. If / when the business requirements change, meaning that one or more work type documents have to always undergo Commissioner's verification, entries records may be restored from the BRCODOCS_BACKUP table into the BRCODOCS table.

Complete Folder

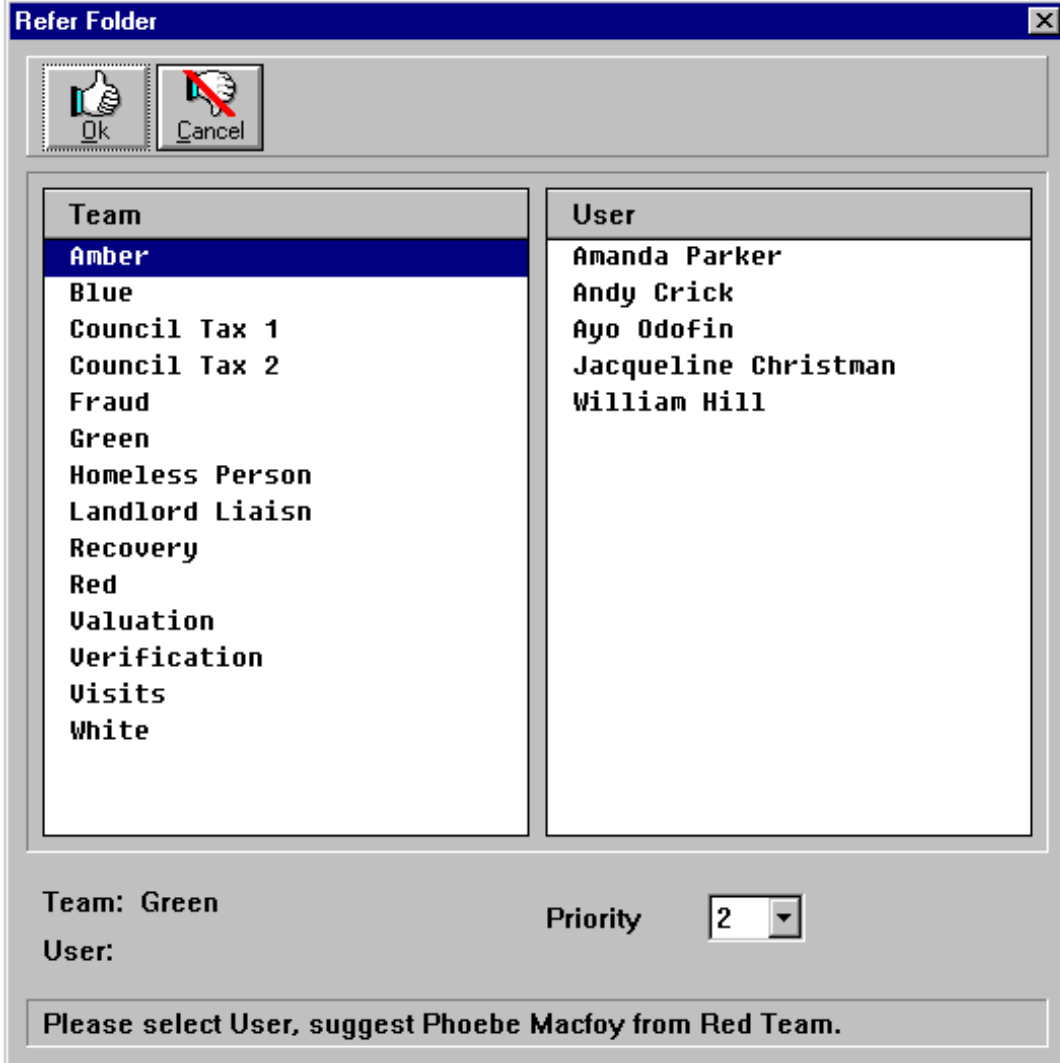
Ok Cancel

Claimant: BARKER Claim Date: 08/02/1999
Work Type: HB - New Application User Name: System Administrator
Work Desc: Application Form[HB] Team: NIL
Compl. Tgt: 12/04/1999 Compl. Date: 30/03/1999
Priority: 9 Requested Action: Assess Case
Susp. Lifted: ☐ Letter Sup. Removed: ☐
Complete to C.O: ☐

Comments

Referring folders

In the past referring folders to the teams did not always enforce a user nomination. While this practice remains unchanged for most teams, it had to be modified for referrals to any of the Housing Benefits teams, Blue, Green, red or White. When a user attempts to refer a folder to any of the colour teams without nominating the user, a message is displayed suggesting the team and the user name that is assigned to the current folder's UPRN. Any team and user may be selected for referrals at any time, therefore referrals remain under full user control.



The 'Refer Folder' dialog box features a title bar with a close button. Below the title bar are 'Ok' and 'Cancel' buttons. The main area contains two lists: 'Team' and 'User'. The 'Team' list includes Amber, Blue, Council Tax 1, Council Tax 2, Fraud, Green, Homeless Person, Landlord Liaison, Recovery, Red, Valuation, Verification, Visits, and White. The 'User' list includes Amanda Parker, Andy Crick, Ayo Odofin, Jacqueline Christman, and William Hill. At the bottom, there are labels for 'Team: Green' and 'User:', a 'Priority' dropdown set to '2', and a message box that reads 'Please select User, suggest Phoebe Macfoy from Red Team.'

Team	User
Amber	Amanda Parker
Blue	Andy Crick
Council Tax 1	Ayo Odofin
Council Tax 2	Jacqueline Christman
Fraud	William Hill
Green	
Homeless Person	
Landlord Liaison	
Recovery	
Red	
Valuation	
Verification	
Visits	
White	

Team: Green Priority: 2

User:

Please select User, suggest Phoebe Macfoy from Red Team.