Practices for Lesson 7: To Do Lists

Overview

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Lesson Overview

There are numerous events that trigger the creation of messages describing work that requires human attention. Each type of message appears in a unique To Do List. For example, there are unique To Do Lists for bill segment errors, payment errors, accounts without bill cycles, etc.

This lesson describes the system's To Do processing.

Lesson Objectives

By the end of this lesson, you will be able to:

- Describe how the system creates the entries that appear in To Do lists
- View and work on the entries in To Do lists
- Introduce new To Do lists

Practice 7-1: Look at To Do Lists

Overview

In this practice, you will open the To Do Summary page and drill down to To Do Lists.

Task

1. Open the **To Do Summary** Page
   - Navigate to **Menu > To Do > To Do Summary** (or press Alt+X).

To Do Summary

Main

User Name Student, 01

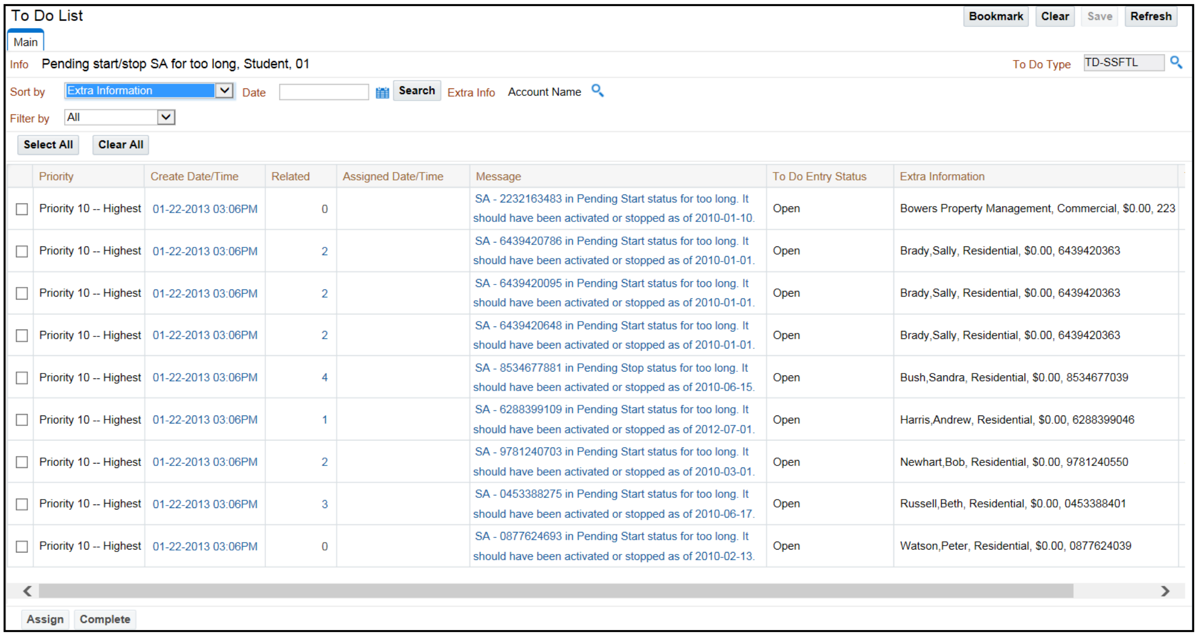
To Do Type	Priority	Total	Open	Assigned to You
Bill segments in error	10	14	12	2
Pending orders	10	3	3	0
Pending start/stop SA for too long	10	9	9	0
Accounts without bill cycle	20	27	27	0
Auto pay amount over limit	20	157	157	0
Help Ticket	20 (8), 80 (1), 90 (12)	21	21	0
Investigate High Bill Complaint	20	3	3	0
New High Bill Complaint	20	10	10	0
Customer contact callback	30 (3), 70 (1), 90 (3)	7	7	0
Case Transition Exception	40	2	2	0
Miscellanous Task (demo data propagation)	60 (1), 80 (1), 90 (5)	7	7	0
Capital credit retirement Errors	80	2	2	0
Create Bill Using Bill Cycle Errors	80	127	127	0
Create late payment charges Errors	80	1	1	0
Generate autopay for pay plans Errors	80	114	114	0
Monitor Budgets Errors	80	1	1	0
SA renewal error	80	1	1	0
Severance event trigger Errors	80	10	10	0
Sync Request Monitor Errors	80	1	1	0

The summary page shows all To Do lists that contain at least one message.

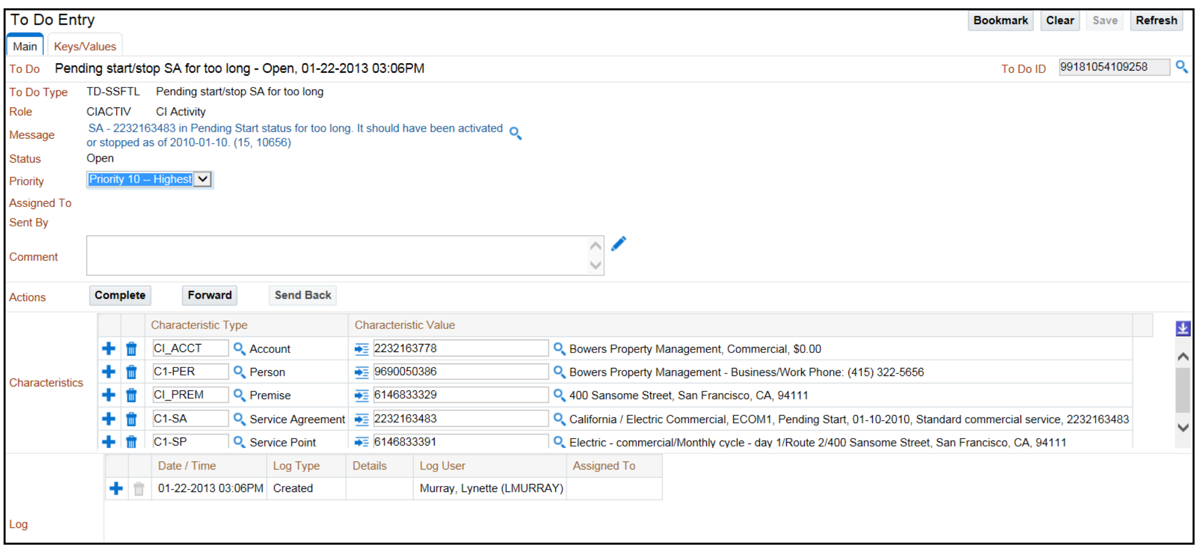
Always up-to-date. Every time you open this page, the totals are updated to reflect the current To Do entries.

2. Open a To Do List
   - Click the **Total Number** link next to *Pending start/stop SA for too long* to open a **To Do list**.

   Do not click the Message column's links (yet). If you click an entry's Message, it will be assigned to you. You will have a chance to do this in a future practice.



3. Click an entry's **Create Date/Time** to navigate into the **To Do entry** where you can see when it was created and objects associated with the entry.
   - Please don't click the **Complete** or **Forward** buttons (yet). You'll have chance to do this in a future practice.



- Click **To Do** (or Alt+X) to return to the **To Do Summary** page.

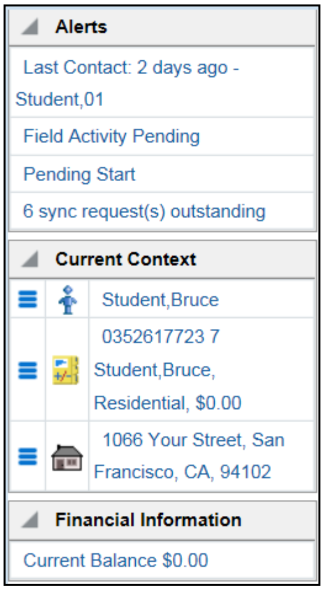
Practice 7-2: Create a Reminder on Your Customer Contact

Overview

In this practice you will create a reminder on your customer contact.

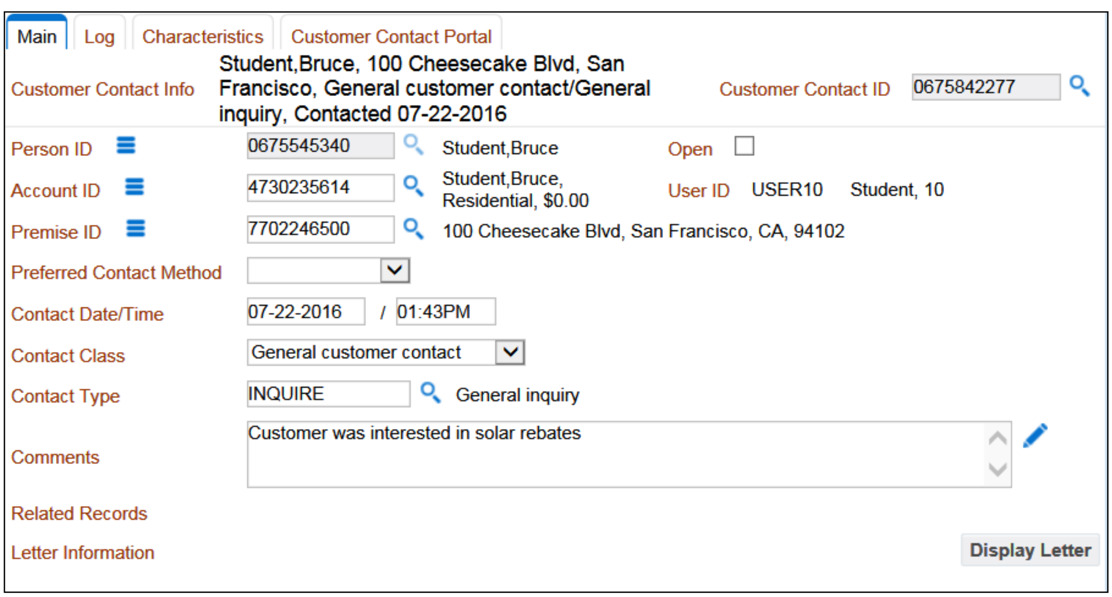
Tasks

1. Find your account.
   - If the **Dashboard** does not contain your account, return to **Control Central** and find your **account**.

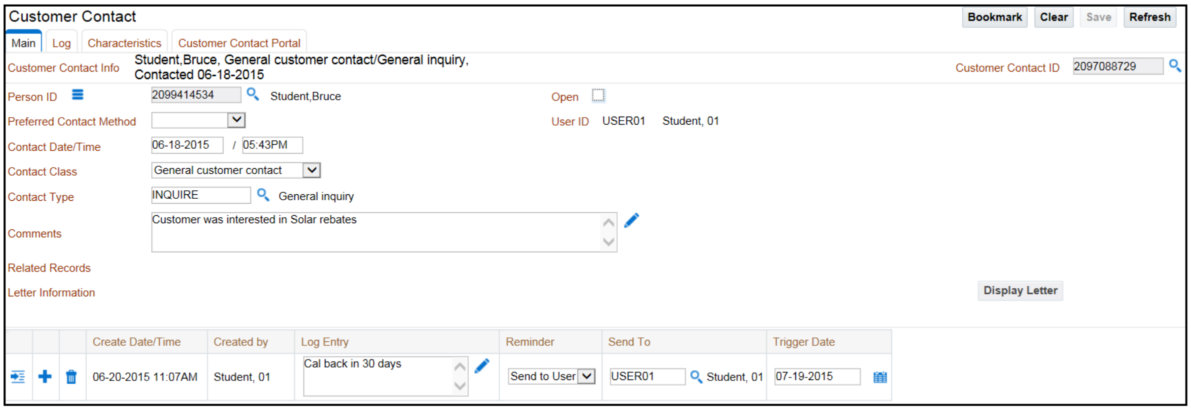


2. Add a reminder to your contact.

   In the previous lesson you created a **customer contact**.
   - Click the **Last Contact** alert in the **Alerts** zone (or click the **Last** link in the **Customer Contact** zone) to display this contact.



3. In the grid at the bottom of the page, enter the following:
   - **Log Entry**: Call back in 30 days
   - **Reminder**: Send to User
   - **User**: Select your user ID
   - **Trigger Date**: 30 days from today



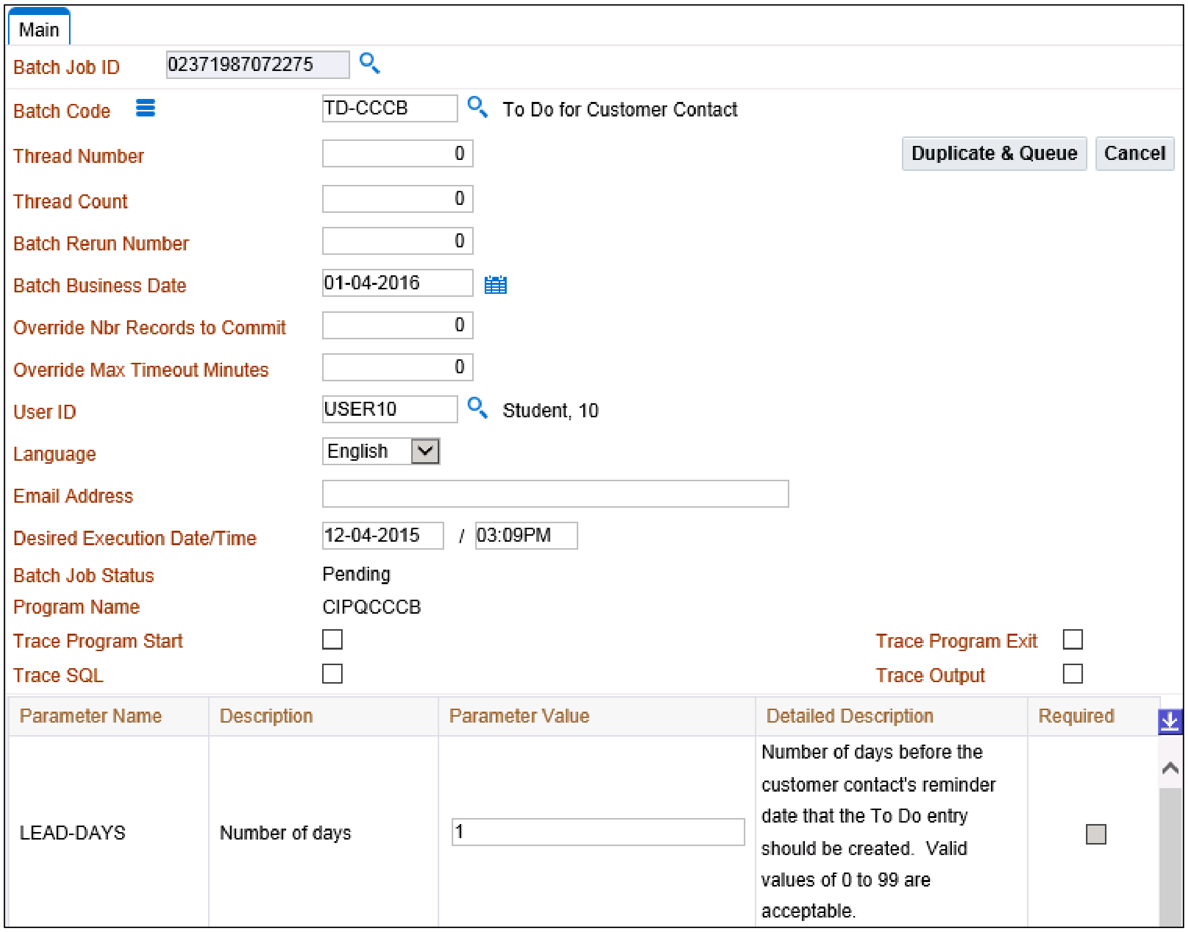
4. **Save** your customer contact and inform your instructor when you finish.
5. When all students have updated their contact, your instructor will run the batch process that creates to do entries for customer contact reminders (*TD-CCCB*). This process creates new entries for reminders linked to customer contacts. It creates the entries in the Being Worked On state (rather than Open) when the reminder is set up for a specific user.

   Instructor Note:

   The following steps are only possible if the Batch Job Submission is enabled. You should verify this before the training class.

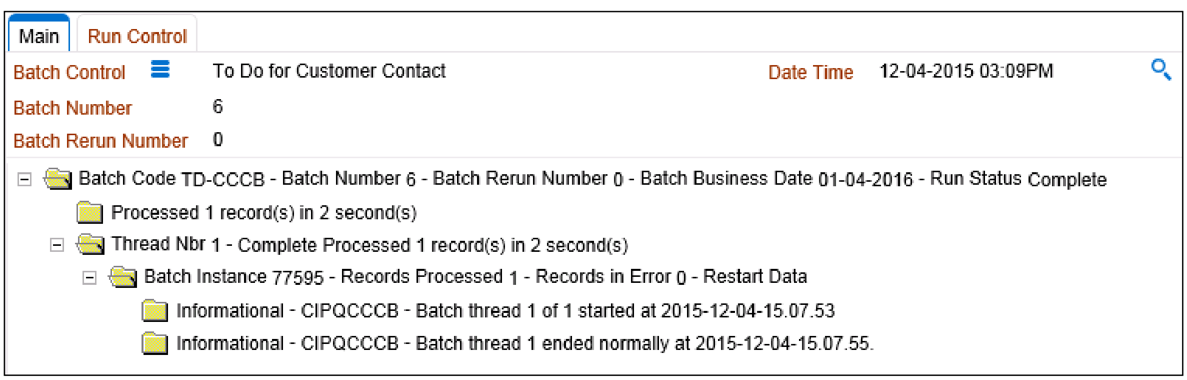
   The following steps summarize what your instructor will be doing:

   - Navigate to the **Batch Job Submission** page using **Menu > Tools > Batch Job Submission > Add**.
   - Enter the following:
     - **Batch Code**: TD-CCCB and then click Save.
     - **Batch Business Date**: enter one month from today's date
     - **LEAD-DAYS** (Parameter): 1



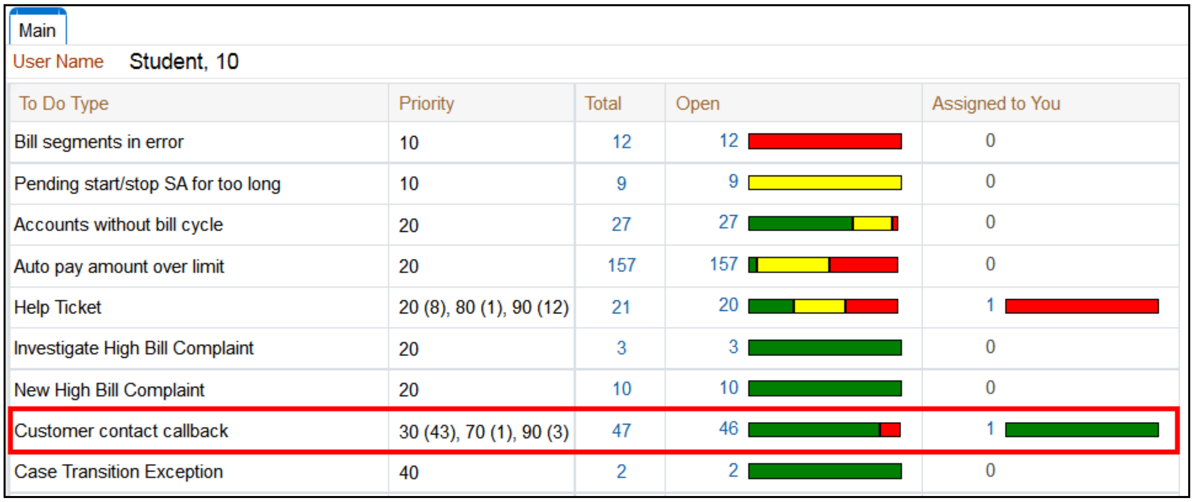
The job should start immediately. Check to see if the job has finished by refreshing the page and checking for the **Batch Job Status** to become *Ended*.

6. To check if it ran successfully, navigate to the **Batch Run Tree** using the context menu adjacent to the **Batch Code**. You should see something like this (except the number of records will be higher):

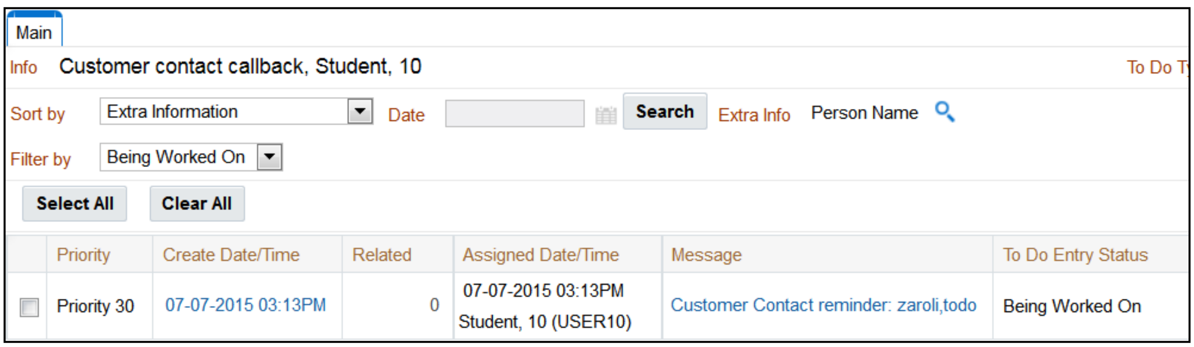


After the batch job is complete, each student can continue with the practice.

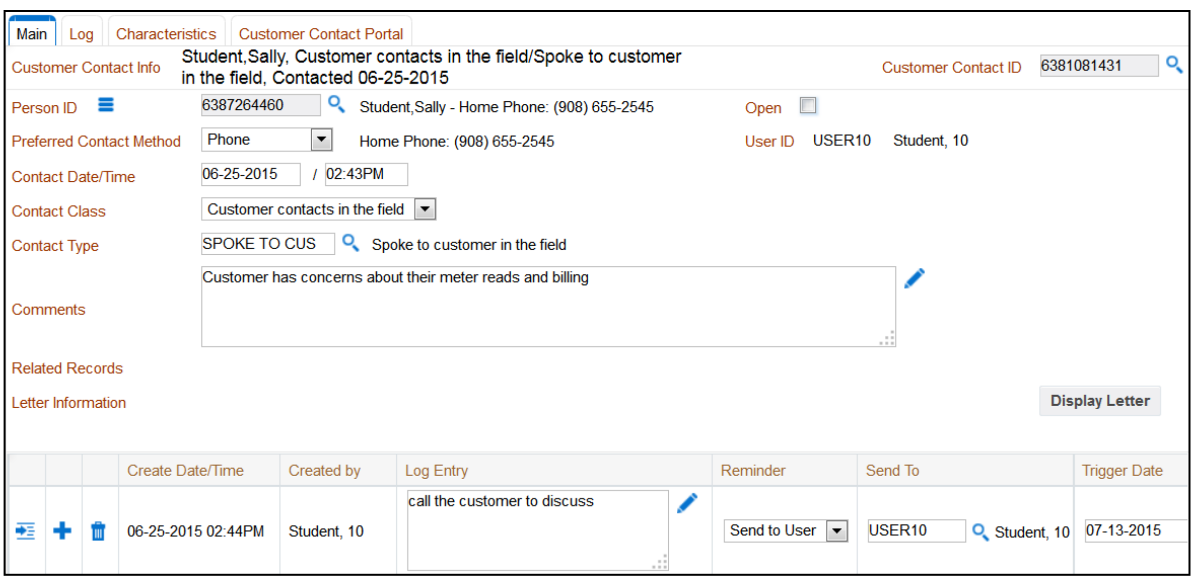
7. When the job has finished, navigate to the **To Do Summary** page (**Menu > To Do Menu > To Do Summary** or Alt+X).



You should see that one To Do entry is assigned to you for the C**ustomer contact callback To Do Type**. Click the **number** or the bar to see it:



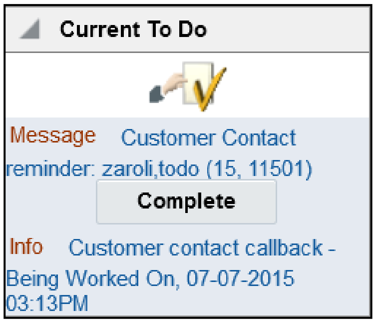
8. Click the link under the **Message** column to see the original contact.



9. Use the **To Do dashboard** zones.

If your **Dashboard** does not contain the **To Do Summary** and the **Current To Do Zones**, change your user preferences accordingly (navigate to **My Preferences**, click the **Portal Preferences** tab and then display these zones for the **Dashboard** portal).

- Notice that the **Current To Do Zone** highlights the **To Do entry**.



- Navigate back to **Control Central** and then click the **Message** in the **Current To Do Zone**. Notice that you return to the customer contact that caused the entry to be created.
- Click the **To Do Age bar** in your **To Do Summary** zone (you will return to the To Do List for this To Do type).

Practice 7-3: Related To Dos

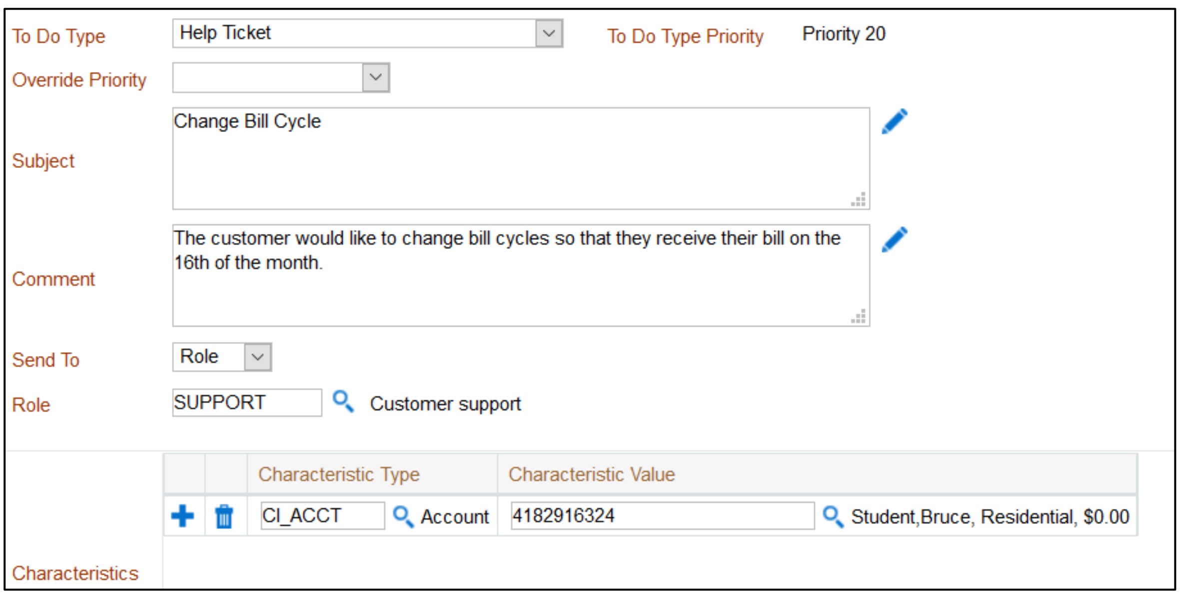
Overview

In this practice you will create another To Do entry for your customer and see how the system highlights the existence of related entries.

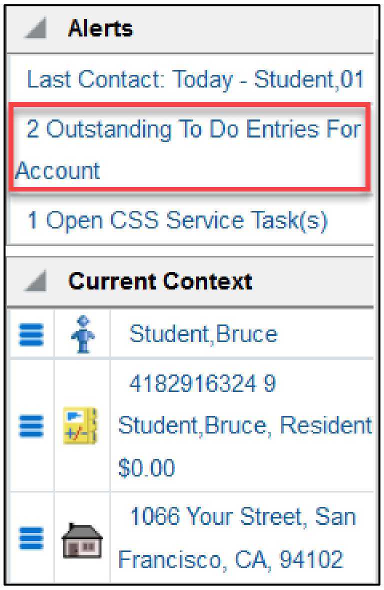
Tasks

1. Create a **Help Ticket** for your **Account**
   - Navigate to **Menu > To Do > To Do Entry > Add**
   - After the page displays, please enter the following information:
     – **To Do Type**: Help Ticket
     – **Subject**: Change Bill Cycle
     – **Comment**: The customer would like to change bill cycles so that they receive their bill on the 16th of the month.
     – **Characteristic Value**: Use the account search to find your account ID.

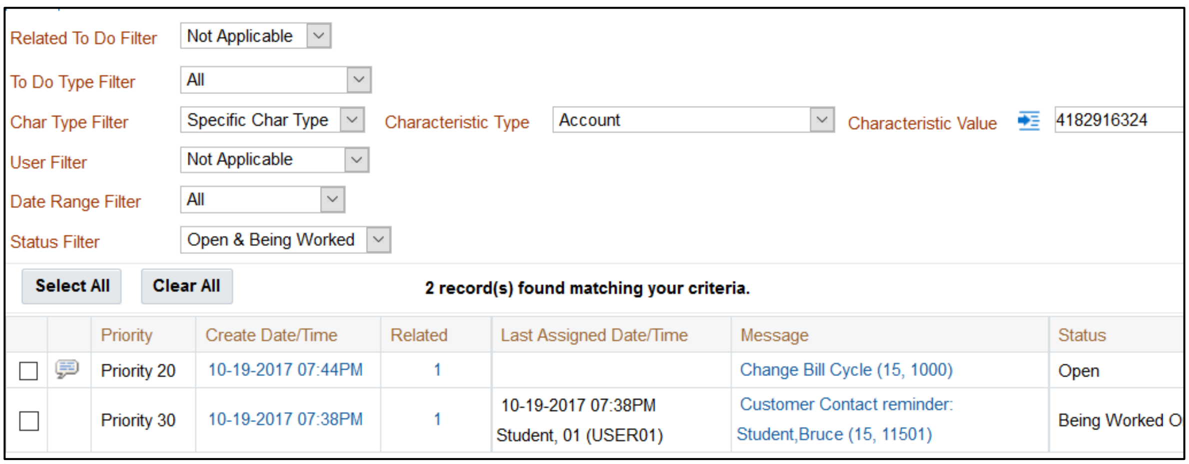
   All other attributes should default and don't require overrides.



2. Click **OK** to add the **To Do entry** (it will be in the open state and assigned the **To Do role** defined above).
3. Search for your customer in Control Central.
   - Notice that the **Dashboard Alerts zone** indicates that there are two **To Dos** for your customer.

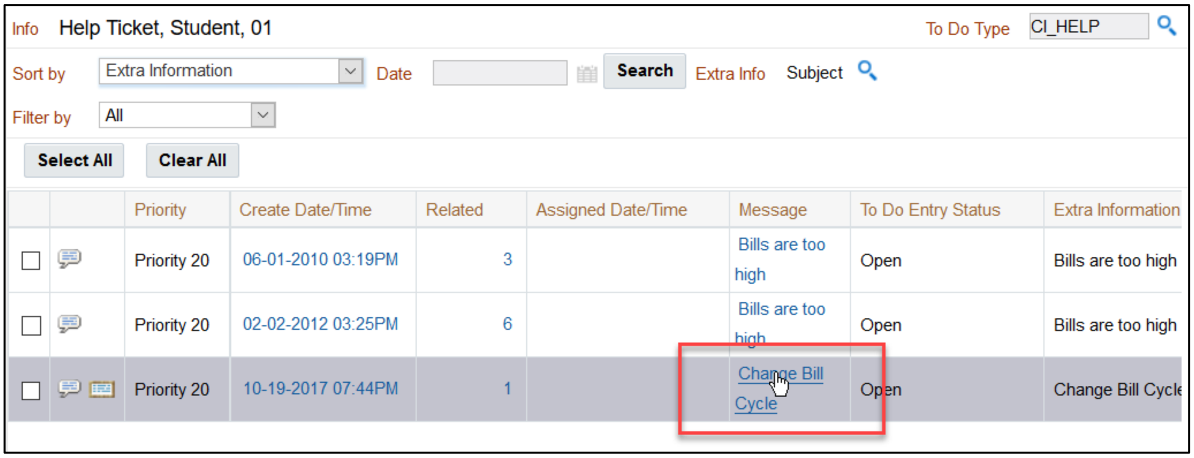


4. Click the **Alerts** zone's alert to see both entries. You will be navigated to the **To Do Search** transaction:

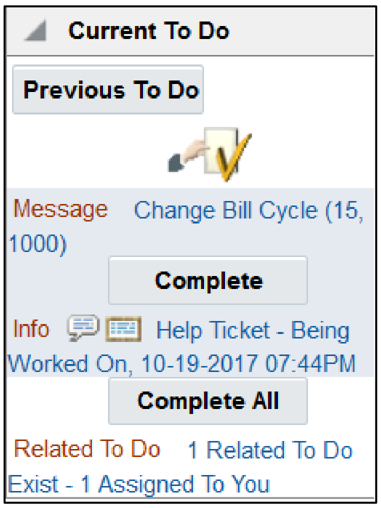


- ***Notice** the Status of each entry. Also notice the values in the **Related column** (this indicates that there's one other entry related to each of these To Dos).*

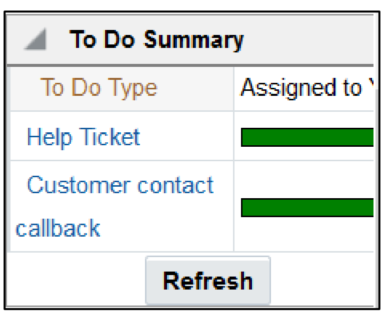
5. Take responsibility for the **help ticket**.
   - Navigate to **Menu > To Do > To Do Summary**
   - Click the link in the **Total** column for **Help Ticket**
   - Find your **Help Ticket To Do** and click the **message link** to start working it.



6. This will navigate you to the help ticket and assign it to your user ID. Notice how the **Current To Do** zone now looks:



- ***Notice** the Related **To Do** is highlighting the customer contact reminder. Also notice how it indicates that it's already assigned to you.*
- Finally, review the **To Do Summary** zone. You should see two entries, one for the **Help Ticket** and another for the **Customer contact callback**



Practice 7-4: Complete Your Entries

Overview

In this practice you will complete the entries that were just created.

Tasks

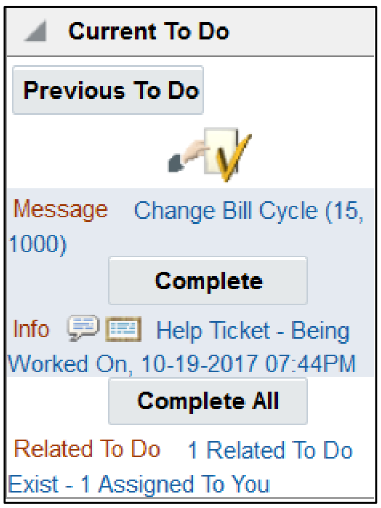
1. Use the **Complete All** button.

   The **Current To Do** zone has two ways to complete a **To Do entry**:

   – You can complete just the current **To Do**

   – You can complete the current **To Do** plus all related **To Dos**

2. Please click the **Complete All** button.

   After doing this, notice the following:

   - *The alert is removed from the Alerts zone.*
   - *The Current To Do zone shows that the current To Do is complete.*
   - *The To Do Summary zone still shows the items for the Help Ticket and another for the Customer contact callback. This is because this zone is not automatically refreshed after an update in order to improve performance. Click the Refresh button to refresh this zone.*

3. Find your account's entries.

   Navigate to **Menu > To Do > To Do Search**. When it opens, please enter the following information:

   – **Char Type Filter**: Specific Char Type

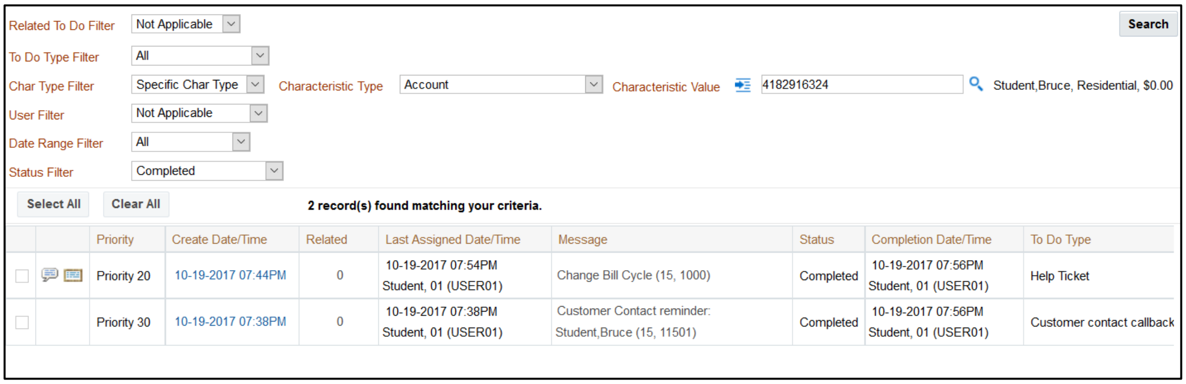
   – **Characteristic Type**: Account

   – **Characteristic Value**: Please use the search to find your account ID

   – **Date Range Filter**: All

   – **Status Filter**: Completed

4. Scroll to the right to click the **Search** button. You will see your two completed entries.

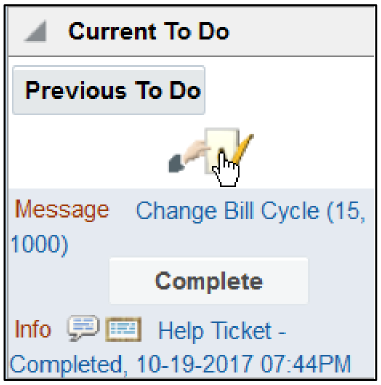


5. Feel free to click the **Create Date/Time** column to see the entry and its history.

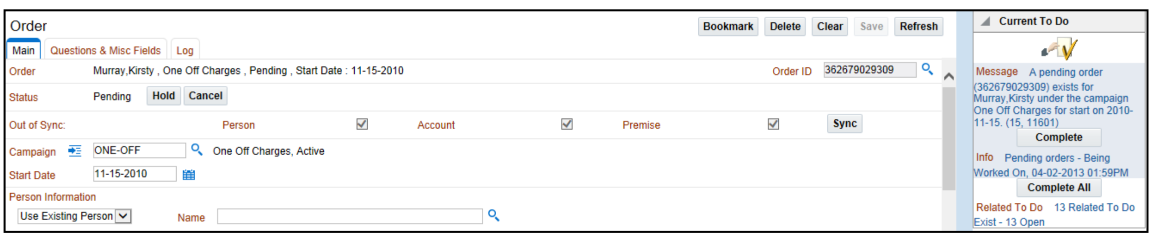
Practice 7-5: Get Your Next Assignment

Tasks

1. Click the **Assign Me a To Do** button  in the **Current To Do** zone.
   – ***Note****: the system leaves the most recent To Do in the zone until you start working a new To Do or log back in.*



- The system will invoke the **Next To Do Assignment plug-in** (plugged in on the installation record).
- The following is a snapshot of how the system looks when the **To Do entry** that was assigned is related to an old service agreement that hasn't been started yet. *Notice how the system immediately navigates to the entry's related transaction and refreshes the Dashboard accordingly.*



2. Navigate to the **Supervisor User Summary** page (Me**nu > To Do > Supervisor User Summary**) and see who's doing what:

Main

User Name Student, 10

User ID	User Name	To Do Type	Assigned this Type	Assigned Total
BSCHER	System, English	Help Ticket	19	19
CRUPPERT	Ruppert , Charlie	Customer contact callback	5	5
HNGUYEN	Nguyen, Hung	Customer contact callback	7	7
LMURRAY	Murray, Lynette	Create Bill Using Bill Cycle Errors	1	17
LMURRAY	Murray, Lynette	Miscellanous Task (demo data propagation)	11	17
LMURRAY	Murray, Lynette	Customer contact callback	2	17
LMURRAY	Murray, Lynette	Order callback	1	17
LMURRAY	Murray, Lynette	Pending orders	1	17
LMURRAY	Murray, Lynette	Pending start/stop SA for too long	1	17
MPINERO	Pinero, Marlon	Miscellanous Task (demo data propagation)	1	3
MPINERO	Pinero, Marlon	Customer contact callback	1	3
MPINERO	Pinero, Marlon	Accounts without bill cycle	1	3
RGULPEO	Gulpeo, Rissa	Customer contact callback	3	3
SYSUSER	System, English	Help Ticket	4	8

3. Navigate to the **Supervisor To Do Summary** page (**Menu > To Do > Supervisor To Do Summary**) and see what's being worked on:

Main

User Name Student, 10

To Do Type	Priority	Total	Open	Being Worked On
Bill segments in error	10	14	12	2
Order callback	10	1	0	1
Pending orders	10	4	0	4
Pending start/stop SA for too long	10	10	9	1
Accounts without bill cycle	20	30	27	3
Auto pay amount over limit	20	157	157	0
Help Ticket	20 (12), 80 (20), 90 (12)	44	19	25
Investigate High Bill Complaint	20	3	3	0
New High Bill Complaint	20	10	10	0
Customer contact callback	30 (51), 70 (13), 90 (3)	67	46	21
Case Transition Exception	40	2	2	0
Miscellanous Task (demo data propagation)	60 (1), 80 (13), 90 (5)	19	7	12

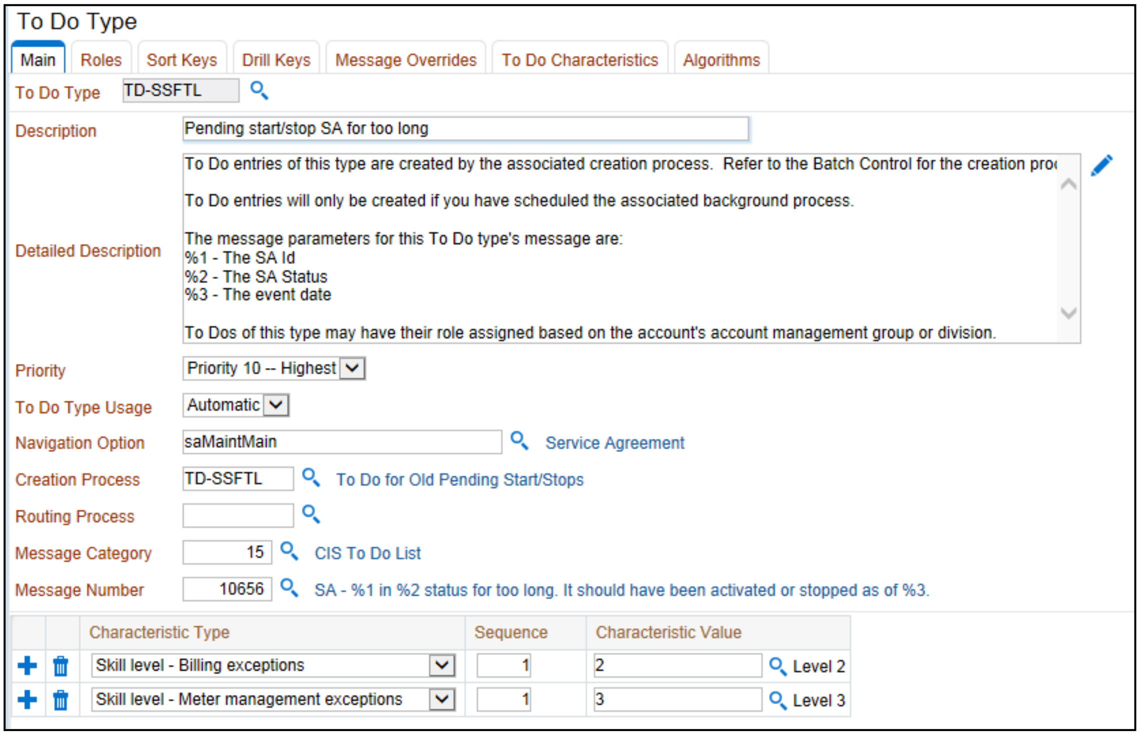
Practice 7-6: Review a To Do Type

Overview

In this practice you will review other information defined on the To Do Type configuration table.

Tasks

1. Navigate to **Admin > General > To Do Type > Search** and then select any type that looks interesting.



If you are not familiar with all of the options on all of the pages, please ask your instructor for assistance.

Review Questions

1. A specific user is assigned to a To Do entry when it is in the state of Being Worked On. True/False

   True

2. A To Do entry may get assigned to a user when they drill down on the entry's message. True/False

   True

3. Only the user assigned to a Being Worked On To Do entry may see the entry in the To Do Summary page. True/False

   True

4. Assume there is an entry that highlights an account without a bill cycle. When a user assigns a bill cycle to the account, the To Do entry will be completed automatically by the system. True/False

   True. The answer is true, but it's important to understand that the system will only automatically complete the entry the next time the background process responsible for the creation and completion for such a To Do entry executes. If a user wants to mark it as Complete before the process runs, they can.

5. A supervisor is a user who is part of a To Do role who also has access to the supervisor pages. True/False

   True. There is no specific attribute on a user that designates them as a supervisor.

6. The system issues a warning if you attempt to assign a To Do entry that has a special skills requirement to a user that doesn't have these skills. True/False

   True

7. Some To Do lists have the same message text for every entry, while others have different messages for the various entries. True/False

   True. It's up to the process that creates the entry - if it supplies a specific message number, it's used; if it doesn't, the default on the To Do type is used.

8. An implementation will probably use a combination of On Demand and Supervisor Push work distribution methods. True/False

   True. The system has been designed to support both methods in a single implementation.

9. A Complete entry can be re-opened. True/False

   False. Only a Being Worked On entry can be re-opened.

10. The Alerts zone will highlight if the person / account / premise in context has open or being worked on To Do entries. True/False

    True

11. If an implementation prefers different message verbiage for a To Do entry, implementers must create a new message and define it on a new To Do type. True/False

    False. You haven't been told this yet, but every message's text can be overridden by an implementation. To do this, display the message on Admin > System > Message and specify the text that you prefer.

12. Assume a specific To Do list is being populated with hundreds of entries with the same message number. It would be a good idea to update the To Do Type to indicate that To Do entries should be suppressed for the specific message number (and your team should create a report or a "sample and submit" instead). True/False

    True.

13. Assume there is an entry that highlights an account without a bill cycle. A user can set the status of the entry to Complete without specifying a bill cycle for the account. True/False

    True. If a user does this, the system will recreate the entry the next time the respective background process runs.

14. In order to Forward or Send Back an entry, a user should first click the entry's date/time or info string to open the To Do Entry maintenance page. True/False

    True