Analytical Tools
Analytical Tools

Business Goals

• Tool for SDR Workload Planning & Resolution
  – Manage and track open/awaiting disposition SDRs
• Review from various vantage points
  –Submitter
  – Owner/manager
  –Shipper
• Get current status and/or complete history on a particular SDR

• Tool to improve future customer support/fewer SDRs
• Perform analysis of past SDRs
  –Determine bad actors (shippers, customers, items, etc.)
  –Determine remedial actions
    » Process changes
    » Technology changes
    » Training
Analytical Tools
Design Goals

- **Functional**
  - Meet the functional user requirements
  - Be user friendly
    - Simple - single query choice page to make selections
    - Flexible - 10’s of thousands of possible reports
    - Drill down research capability - cascading reports
    - Timely web responses
    - Standard output report forms regardless of selections
- **Technical**
  - Flexibility to accommodate future query capabilities
  - Dynamic query/standard output views
  - Drill down from one report level to another
Analytical Tools
Current Status

• Composite Report in available to all
  - Consolidation of all SDR transactions applicable to the specific SDR
    • WebSDR Control Number & Document Number/Suffix driven
    • Header data & summary view of each record in chronologic order (most recent at top) with hyperlink to each individual SDR transaction record - quick tool for tracking sequence of events
    - Component feedback?
  • Matrix table build and load complete (April 24, 2009)
    - Source data for on-line management reports - extracted as new transactions are processed
    - Currently includes 134 data fields to capture latest “status,” dates of various actions, and key data elements to be made available for use in reports
      • Does not include every data element on the SDR (no remarks) - balancing act between operational efficiency and potential ad hoc query data needs
  • Requires additional emphasis on reply data content to adjust customer-provided information when not coded correctly
Management Report - SDR Status

Status based on most recent type of transaction processed, action code in report, and reply code in most recent response:
“Info only” - not identified as open;
Interim replies - not identified as “Disposition Provided”
• Live demo
  – Components to provide feedback
• “Canned” query for transshipper SDRs
  – Components to provide feedback
  – Components to define additional query requirements