

**CCO eCoaching**

**Database Design**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Prepared By: CCO eCoaching Engineering Team

Department: HCSD

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Approved by:

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1. **Software Project Overview and Scope**

The eCoaching Log (eCL) is an internal GDIT tool designed for the entry and storage of coaching notes that supervisors, managers, training and quality leads create regarding CSR performance. The application provides users with a platform for initiating a coaching request directly from the web interface or tracking the workflow of a coaching log initiated from the telecom or Quality source systems. Users will be appropriately notified at each stage of the Coaching process to help act in a timely manner to complete the coaching process. Dashboards and reporting will be created to allow users to get a consolidated view of the coaching logs for their teams and to allow for analysis of trends. It also provides a repository of coaching notes to generate reports for CCO management. The eCL tool supports the paperless Secure Floor environment of the CCO by eliminating the need to physically print and store coaching records. In addition to logs submitted from the web interface, the application (eCL) will use data from Peoplesoft, Aspect eWFM, Quality and Telecom systems.

* 1. **System Diagram**

Employee Data from PeopleSoft

Supervisor and Program Data from eWFM

Outliers Data from NDW

Quality Data from IQS/Verint

File Staging Area

(VRIVSCORS01)

Load Processes

(SSIS/ETL)

eCoaching Database eCoaching on VDENSSDBP07\SCORP01

Web Interface

VADENMWBP11

* 1. **Interfaces**
     1. **Hardware**
* Web Servers

VADENMWBP11 (prod)

VACMSMPMD01 (dev)

* Database on Shared Virtual SQL Server Instances

eCoaching on VDENSSDBP07\SCORP01 (prod)

eCoachingDev on VRIVFSSDBT02\SCORD01,1437 (dev)

* VRIVSCORS01- File staging server
  + 1. **External Software**
* The software components used for the creation and maintenance of the database.
  + Database: SQL Server 2008 R2 SP1 Suite (Including SSIS)
  + Visual Studio 2008 9.030729.4462
  + Windows Script Host 5.8.7600.16385
  + 7zip 9.2
  1. **Users and User Access**

The users will gain access via the web interface via submission pages to submit coaching logs and dashboards to review submitted logs. The following group of CCO users will have access:

* CCO CSRs
* CCO Supervisors
* CCO Managers
* CCO Quality Specialists and Trainers
* CCO Engineering and Support Staff
  1. **Inputs and Outputs**
     1. **Inputs**



#### Employee Feed from PeopleSoft

Description: This is an Employee file from Peoplesoft. Used for capturing Employee attributes

Like Employee ID, Name, Lan ID, Location, Job Code and Manager(Supervisor’s supervisor) and last hire date and Active Flag.

Source system: PeopleSoft

Staging location: [\\vrivscors01\BCC Scorecards\Coaching\HRInfo\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\HRInfo\)

File name: PS\_Employee\_Information\_mmddyyyy.csv

Frequency: Daily

Load job: NewDailyHRLoad sql agent job

Load time: 8 PM EST (DB time 6:00 PM )

Destination Table: Employee\_Hierarchy

|  |  |  |
| --- | --- | --- |
| Feed Element | Employee\_Hierarchy | Comments |
| lanid | Emp\_LanID |  |
| emplid | Emp\_ID |  |
| first\_name | Emp\_Name | Derived From first, middle and last names. |
| middle\_name |
| last\_name |
| locationid | Emp\_Site | Derived from locationid. |
| location |
| supervisorid | Sup\_Emp\_ID | For CSRs sup is replaced with Sup from WFM |
|  | Mgr\_Emp\_ID | Mgr\_Emp\_ID is derived from supervisor’s supervisor value from the feed. |
| jobcodeid | Emp\_Job\_Code |  |
| jobcode | Emp\_Job\_Description |  |
| email\_address | Emp\_Email |  |
| empl\_status | Active |  |
| last\_hiredate | Start\_Date |  |

#### Employee Feed from Aspect eWFM

Description: This is an Employee file from Aspect eWFM. Used to capture the Supervisor for employees having a CSR job code and the program value. The program value should be associated with the call or activity and will be input from the web interface or provided in the Coaching requests from Quality system and Outliers feeds. The program value based on the agents 1MULTI value from eWFM will only be sued when a program cannot be identified for the call activity for a specific coaching log.

Source system: Aspect eWFM

Staging location: [\\vrivscors01\BCC Scorecards\Coaching\EmpInfo\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\EmpInfo\)

File name: Employee\_information\_WithProgram.csv

Frequency: Daily

Load job: NewDailyHRLoad sql agent job

Load time: 8 PM EST (6:00 PM Database time)

Destination Table: EmpID\_To\_SupID\_Stage

|  |  |  |
| --- | --- | --- |
| Feed Element | EmpID\_To\_SupID\_Stage | Comments |
| EMP\_ID | Emp\_ID | Not used |
| EMP\_SORT\_NAME | Emp\_Name | Not used |
| EMP\_JOB\_CODE | Emp\_Job\_Code | Not used |
| EMP\_SITE | Emp\_Site\_Code | Not used |
| SUP\_ID | Sup\_ID | Used for populating Supervisor value for CSRs. |
| EMP\_PROGRAM | Emp\_Program | Used for populating program value for CSRs. |

#### Web Interface for Coaching Logs

Description: This is the primary method for Coaching log submissions. Users can submit direct or indirect Coaching logs from the main coaching page.

Source system: N/A

Frequency: N/A (On demand)

Load job: N/A

Load time: N/A

#### Quality Feed for Coaching Logs

Description: This is the feed of evaluations from the Quality system. Passed evaluations are just acknowledged by the CSR whereas failed, evaluations start off with a sup or mgr review depending on whether or not it is a CSE. Appropriate notifications are sent out depending on the status of the log on insert into the table.

Source system: Quality system (Verint or other)

Staging location: [\\vrivscors01\BCC Scorecards\Coaching\Apps\Encryption\Encrypt\_out\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\Apps\Encryption\Encrypt_out\)

File name: eCL\_IQS\_Scorecard\_yyyymmdd.csv.zip.encrypt

(file gets decrypted as eCL\_IQS\_Scorecard\_20140209.csv into the decrypt\_out folder [\\vrivscors01\BCC Scorecards\Coaching\Apps\Encryption\Decrypt\_out\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\Apps\Encryption\Decrypt_out\) during the load process.

Frequency: Daily

Load job: NewDailyCoaching

Load time: 6:30 AM EST (4:30 AM Database time)

Destination Tables: Coaching\_Log and Quality\_Coaching\_Fact

|  |  |  |  |
| --- | --- | --- | --- |
| Feed Element | Quality\_Coaching\_Fact | Coaching\_Log | Comments |
| Column 0- EvalID | Eval\_ID | VerintEvalID |  |
| Column 1-EvalDate | Eval\_Date | StartDate |  |
| Column 2-EvalSiteID | Eval\_Site\_ID |  |  |
| Column 3-UserID | User\_ID |  |  |
| Column 4-UserEmpID | User\_EmpID | CSRID |  |
| Column 5-SupID | Sup\_ID |  |  |
| Column 6-SupEmpID | Sup\_EmpID |  |  |
| Column 7-MgrID | Mgr\_ID |  |  |
| Column 8-MgrEmpID | Mgr\_EmpID |  |  |
| Column 9-JournalNum | Journal\_ID | VerintID |  |
| Column 10-CallDate | Call\_Date |  |  |
| Column 11-CoachingDate |  |  |  |
| Column 12-SumOfCallerIssues | Summary\_CallerIssues | Description |  |
| Column 13-CoachingDiscussion | Coaching\_Goal\_Discussion |  |  |
| Column 14-CSE | CSE | isCSE  AND  StatusID | 1. WHEN CSE = '' THEN 0 ELSE 1  2. Used along with Oppor\_Rein value to determine Status |
| Column 15-EvaluatorID | Evaluator\_ID | SubmitterID |  |
| Column 16-CoachedBy |  |  |  |
| Column 17-CoachedByEmpID |  |  |  |
| Column 18-Source | Source |  |  |
| Column 19-CSR\_Signature |  |  |  |
| Column 20-Oppoer\_rein | Oppor\_Rein | StatusID | Status is indirectly derived using Oppor\_Rein value and CSE value |
| Column 21-Program | Program | ProgramName |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Feed Element | Quality\_Coaching\_Fact | Coaching\_Log\_Reason | Comments |
| Column 20-Oppoer\_rein | Oppor\_Rein | Value | Child table for Coaching Reasons |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

#### Outliers Feed for Coaching Logs

Description: Outlier reports will be created by the BCC Analytics team which will identify thresholds and exceptions for 19 metrics that require coaching or further research by Call Center Mangers (CCM). A feed will be generated for each metric based on the predefined input format..

19 metrics identified: (3 letter report code at the end used to identify the Report)

|  |
| --- |
| * Inbound Short Calls-ISQ |
| * Returned MAC Escalation-RME |
| * Inappropriate DME Escalation-IDE |
| * Inappropriate EE/MM Escalation-IEE |
| * Low CSAT-LCS |
| * Inappropriate NGD Feedback-INF |
| * Scripts Logged-SLG |
| * Default Qualifiers-DFQ |
| * ISG Consults-ISG |
| * Inappropriate ACO Escalation-ACO |
| * Transfers-TRN |
| * Inappropriate ARC Escalation-IAE |
| * Outbound Short Calls-OSC |
| * Cancelled Calls-CAN |
| * Open Calls-OPN |
| * ACW-ACW |
| * AHT-AHT |
| * NGD Inappropriate Transfer-NIT |
| * BCC Security and Privacy Incident Coaching-SPI |

Source system: Various source systems depending on the metric.

Staging location: [\\vrivscors01\BCC Scorecards\Coaching\Outliers\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\Outliers\)

File name: eCL\_Outlier\_Feed\_XXXyyyymmdd.csv where XXX is the 3 letter report code for each metric as shown above.

Frequency: As needed

Load job: NewDailyCoaching

Load time: 6:30 AM EST (4:30 AM Database time)

Coaching\_Log and Outlier\_Coaching\_Fact

|  |  |  |  |
| --- | --- | --- | --- |
| Feed Element | Outlier\_Coaching\_Fact | Coaching\_Log | Comments |
| numReportID | Report\_ID | numReportID |  |
| strReportCode | Report\_Code | strReportCode |  |
| strFormType | Form\_Type | SourceID |  |
| strSource | Source |  |
| strFormStatus | Form\_Status | StatusID | Looked up |
| EventDate | Event\_Date | EventDate |  |
| SubmittedDate | Submitted\_Date | SubmittedDate |  |
| StartDate | Start\_Date | StartDate |  |
| strSubmitterName | Submitter\_LANID |  |  |
| strSubmitterEmail | Submitter\_Email |  |  |
| strcSR | CSR\_LANID | FormName, CSR |  |
| strCSRSite | CSR\_Site |  |  |
| strCoachingReason\_Current\_Coaching\_Initiatives | CoachReason\_Current\_Coaching\_Initiatives |  |  |
| txtDescription | TextDescription | Description |  |
| strProgram | Program | ProgramName |  |
|  |  |  |  |
|  |  |  |  |
| Feed Element | Outlier\_Coaching\_Fact | Coaching\_Log\_Reason | Comments |
| strCoachingReason\_Current\_Coaching\_Initiatives | CoachReason\_Current\_Coaching\_Initiatives | Value |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

* + 1. **Outputs**
* Web interface submission page
* Web interface main dashboard
* Web interface historical dashboard
* Web interface historical dashboard access control list

1. **Database**

The eCoaching database resides on a shared sql server instance VDENSSDBP07\SCORP01. The database objects are in a schema named ’EC’. All feeds and input files are staged on a file share

[\\VRIVSCORS01\bCC Scorecards\](file:///\\VRIVSCORS01\bCC%20Scorecards\) as noted in the Inputs section above.

* 1. **eCoaching Tables.**

This section outlines the tables in the Coaching.EC schema and the data stored in them.

|  | **Table Name** | **Table Description** |
| --- | --- | --- |
| 1. | Coaching\_Log | Parent table for storing Coaching logs. |
| 2. | Coaching\_Log\_Reason | Child Table for storing Reasons for the Coaching logs. |
| 3. | Employee\_Hierarchy | Table for storing Employee Information. |
| 4. | Employee\_Hierarchy\_Stage | Table used for staging the Employee Information from PeopleSoft during the Employee Hierarchy load process. |
| 5. | EmpID\_To\_SupID\_Stage | Table used for staging the Sup Ids from Aspect eWFM during the Employee Hierarchy load process. |
| 6. | EmployeeID\_To\_LanID | Table used for storing Employee ID to Lan ID links over time. |
| 7. | CSR\_Hierarchy | Table used for storing CSR Hierarchy records over time. |
| 8. | DIM\_Coaching\_Reason | Static table used for storing Coaching reason values. |
| 9. | DIM\_Date | Static table used for storing Date dimension values. |
| 10. | DIM\_Site | Static table used for storing Coaching site values. |
| 11. | DIM\_Status | Static table sued for storing Status values. |
| 12. | DIM\_Source | Static table used for storing Coaching source values. |
| 13. | DIM\_Sub\_Coaching\_Reason | Static table used for storing sub Coaching reason values. |
| 14. | Quality\_Coaching\_Stage | Table used for staging the Quality evaluations from IQS during the insert into Coaching\_Log table. |
| 15. | Quality\_Coaching\_Rejected | Table used for storing the rejected Quality evaluations from IQS during the insert into Coaching\_Log table. Logs are rejected when a Lan ID cannot be looked up for an incoming Employee ID in the file. |
| 16. | Quality\_Coaching\_Fact | Table used for storing Quality source records loaded into the Coaching Log table. |
| 17. | Quality\_FileList | Table used for storing Quality file names and Load dates. |
| 18. | Outlier\_Coaching\_Stage | Table used for staging the OMR records during the insert into Coaching\_Log table. |
| 19. | Outlier\_Coaching\_Rejected | Table used for storing the rejected OMR records during the insert into Coaching\_Log table. Logs are rejected when an incoming Lan ID does not exist in the Employee\_Hierarchy table. |
| 20. | Outlier\_Coaching\_Fact | Table used for storing Outliers source records loaded into the Coaching Log table. |
| 21. | Outlier\_FileList | Table used for storing the OMR file names and Load dates. |
| 22. | Historical\_Dashboard\_ACL | Table used for storing user records that do not fall into the regular hierarchy to provide access to the historical dashboards. |



### EC.Coaching\_Log

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype (Size)** | **Comment** | **PK** | **FK** |
| CoachingID | bigint | IDENTITY(1,1) | x |  |
| FormName | nvarchar(50) |  |  |  |
| ProgramName | nvarchar(50) |  |  |  |
| SourceID | int |  |  | x |
| StatusID | int |  |  | x |
| SiteID | int |  |  | x |
| CSR | nvarchar(50) |  |  |  |
| CSRID | nvarchar(10) |  |  |  |
| SubmitterID | nvarchar(10) |  |  |  |
| EventDate | datetime |  |  |  |
| CoachingDate | datetime |  |  |  |
| isAvokeID | bit |  |  |  |
| AvokeID | nvarchar(40) |  |  |  |
| isNGDActivityID | bit |  |  |  |
| NGDActivityID | nvarchar(40) |  |  |  |
| isUCID | bit |  |  |  |
| UCID | nvarchar(40) |  |  |  |
| isVerintID | bit |  |  |  |
| VerintID | nvarchar(40) |  |  |  |
| VerintEvalID | nvarchar(20) |  |  |  |
| Description | nvarchar(max) |  |  |  |
| CoachingNotes | nvarchar(4000) |  |  |  |
| isVerified | bit |  |  |  |
| SubmittedDate | datetime |  |  |  |
| StartDate | datetime |  |  |  |
| SupReviewedAutoDate | datetime |  |  |  |
| isCSE | bit |  |  |  |
| MgrReviewManualDate | datetime |  |  |  |
| MgrReviewAutoDate | datetime |  |  |  |
| MgrNotes | nvarchar(3000) |  |  |  |
| isCSRAcknowledged | bit |  |  |  |
| CSRReviewAutoDate | datetime |  |  |  |
| CSRComments | nvarchar(3000) |  |  |  |
| EmailSent | bit | DEFAULT(0) |  |  |
| numReportID | int |  |  |  |
| strReportCode | nvarchar(30) |  |  |  |
| isCoachingRequired | bit |  |  |  |
| strReasonNotCoachable | nvarchar(30) |  |  |  |
| txtReasonNotCoachable | nvarchar(3000) |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### EC.Coaching\_Log\_Reason

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| CoachingID | bigint |  | x | x |
| CoachingReasonID | bigint |  |  |
| SubCoachingReasonID | bigint |  |  |
| Value | nvarchar(30) |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### EC.Employee\_Hierarchy

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Emp\_ID | nvarchar(10) |  | x |  |
| Emp\_Name | nvarchar(70) |  |  |  |
| Emp\_Email | nvarchar(50) |  |  |  |
| Emp\_LanID | nvarchar(30) |  |  |  |
| Emp\_Site | nvarchar(50) |  |  |  |
| Emp\_Job\_Code | nvarchar(50) |  |  |  |
| Emp\_Job\_Description | nvarchar(50) |  |  |  |
| Emp\_Program | nvarchar(20) |  |  |  |
| Sup\_ID | nvarchar(10) |  |  |  |
| Sup\_Name | nvarchar(70) |  |  |  |
| Sup\_Email | nvarchar(50) |  |  |  |
| Sup\_LanID | nvarchar(20) |  |  |  |
| Sup\_Job\_Code | nvarchar(50) |  |  |  |
| Sup\_Job\_Description | nvarchar(50) |  |  |  |
| Mgr\_ID | nvarchar(10) |  |  |  |
| Mgr\_Name | nvarchar(70) |  |  |  |
| Mgr\_Email | nvarchar(50) |  |  |  |
| Mgr\_LanID | nvarchar(20) |  |  |  |
| Mgr\_Job\_Code | nvarchar(50) |  |  |  |
| Mgr\_Job\_Description | nvarchar(50) |  |  |  |
| Start\_Date | nvarchar(10) |  |  |  |
| End\_Date | nvarchar(10) | DEFAULT(99991231) |  |  |
| Active | nvarchar(1) |  |  |  |
|  |  |  |  |  |

### EC.Employee\_Hierarchy\_Stage

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Emp\_ID | nvarchar(10) |  |  |  |
| Emp\_Name | nvarchar(70) |  |  |  |
| Emp\_Email | nvarchar(50) |  |  |  |
| Emp\_Site | nvarchar(50) |  |  |  |
| Emp\_Job\_Code | nvarchar(20) |  |  |  |
| Emp\_Job\_Description | nvarchar(50) |  |  |  |
| Emp\_LanID | nvarchar(30) |  |  |  |
| Emp\_Program | nvarchar(20) |  |  |  |
| Sup\_Emp\_ID | nvarchar(10) |  |  |  |
| Sup\_Name | nvarchar(70) |  |  |  |
| Sup\_Email | nvarchar(50) |  |  |  |
| Sup\_Job\_Code | nvarchar(50) |  |  |  |
| Sup\_Job\_Description | nvarchar(50) |  |  |  |
| Sup\_LanID | nvarchar(30) |  |  |  |
| Mgr\_Emp\_ID | nvarchar(10) |  |  |  |
| Mgr\_Name | nvarchar(70) |  |  |  |
| Mgr\_Email | nvarchar(50) |  |  |  |
| Mgr\_Job\_Code | nvarchar(50) |  |  |  |
| Mgr\_Job\_Description | nvarchar(50) |  |  |  |
| Mgr\_LanID | nvarchar(30) |  |  |  |
| Start\_Date | datetime |  |  |  |
| Active | nvarchar(1) |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### EC.EmpID\_To\_SupID\_Stage

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Emp\_ID | nvarchar(20) |  |  |  |
| Emp\_Name | nvarchar(50) |  |  |  |
| Emp\_Job\_Code | nvarchar(5) |  |  |  |
| Emp\_Site\_Code | nvarchar(20) |  |  |  |
| Sup\_ID | nvarchar(20) |  |  |  |
| Emp\_Program | nvarchar(20) |  |  |  |

### EC.EmployeeID\_To\_LanID

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| EmpID | nvarchar(20) |  | x |  |
| StartDate | int |  |  |
| EndDate | int |  |  |
| LanID | nvarchar(30) |  |  |  |
| DatetimeInserted | datetime |  |  |  |
| DatetimeLastUpdated | datetime |  |  |  |

### EC.CSR\_Hierarchy

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| EmpID | nvarchar(10) |  | x |  |
| SupID | nvarchar(10) |  |  |  |
| MgrID | nvarchar(10) |  |  |  |
| StartDate | datetime |  | x |  |
| EndDate | datetime |  |  |  |
|  |  |  |  |  |

### EC.DIM\_Coaching\_Reason

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| CoachingReasonID | int | IDENTITY(1,1) | x |  |
| CoachingReason | nvarchar(100) |  |  |  |
|  |  |  |  |  |

### EC.DIM\_Site

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| SiteID | int | IDENTITY(1,1) | x |  |
| City | nvarchar(20) |  |  |  |
| State | nvarchar(20) |  |  |  |
| StateCity | nvarchar(30) |  |  |  |

### EC.DIM\_Date

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| DateKey | int |  | x |  |
| FullDate | datetime |  |  |  |
| DateName | nvarchar(11) |  |  |  |
| DayOfWeek | int |  |  |  |
| DayNameOfWeek | nvarchar(10) |  |  |  |
| DayOfMonth | int |  |  |  |
| WeekOfYear | int |  |  |  |
| MonthName | nvarchar(10) |  |  |  |
| MonthOfYear | int |  |  |  |
| CalendarQuarter | int |  |  |  |
| CalendarYear | int |  |  |  |
| CalendarYearMonth | nvarchar(7) |  |  |  |
| CalendarYYYYQQ | nvarchar(7) |  |  |  |
|  |  |  |  |  |

### EC.DIM\_Status

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| StatusD | int | IDENTITY(1,1) | x |  |
| Status | nvarchar(100) |  |  |  |
|  |  |  |  |  |

### EC.DIM\_Source

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| SourceID | int | IDENTITY(1,1) | x |  |
| CoachingSource | nvarchar(100) |  |  |  |
| SubCoachingSource | nvarchar(100) |  |  |  |
|  |  |  |  |  |

### EC.DIM\_Sub\_Coaching\_Reason

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| SubCoachingReasonID | int | IDENTITY(1,1) | x |  |
| SubCoachingReason | nvarchar(200) |  |  |  |
|  |  |  |  |  |

### EC.Quality\_Coaching\_Stage

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Eval\_ID | nvarchar(20) |  |  |  |
| Eval\_Date | datetime |  |  |  |
| Eval\_Site\_ID | int |  |  |  |
| User\_ID | nvarchar(20) |  |  |  |
| User\_EMPID | nvarchar(20) |  |  |  |
| User\_LANID | nvarchar(30) |  |  |  |
| SUP\_ID | nvarchar(20) |  |  |  |
| SUP\_EMPID | nvarchar(20) |  |  |  |
| MGR\_ID | nvarchar(20) |  |  |  |
| MGR\_EMPID | nvarchar(20) |  |  |  |
| Journal\_ID | nvarchar(30) |  |  |  |
| Call\_Date | datetime |  |  |  |
| Summary\_CallerIssues | nvarchar(max) |  |  |  |
| Coaching\_Goal\_Discussion | nvarchar(4000) |  |  |  |
| CSE | nvarchar(2) |  |  |  |
| Evaluator\_ID | nvarchar(20) |  |  |  |
| Program | nvarchar(20) |  |  |  |
| Source | nvarchar(30) |  |  |  |
| Oppor\_Rein | nvarchar(20) |  |  |  |
| Date\_Inserted | datetime |  |  |  |
|  |  |  |  |  |

### EC.Quality \_Coaching\_Rejected

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Eval\_ID | nvarchar(20) |  |  |  |
| Eval\_Date | datetime |  |  |  |
| Eval\_Site\_ID | int |  |  |  |
| User\_ID | nvarchar(20) |  |  |  |
| User\_EMPID | nvarchar(20) |  |  |  |
| User\_LANID | nvarchar(30) |  |  |  |
| SUP\_ID | nvarchar(20) |  |  |  |
| SUP\_EMPID | nvarchar(20) |  |  |  |
| MGR\_ID | nvarchar(20) |  |  |  |
| MGR\_EMPID | nvarchar(20) |  |  |  |
| Journal\_ID | nvarchar(30) |  |  |  |
| Call\_Date | datetime |  |  |  |
| Summary\_CallerIssues | nvarchar(max) |  |  |  |
| Coaching\_Goal\_Discussion | nvarchar(4000) |  |  |  |
| CSE | nvarchar(2) |  |  |  |
| Evaluator\_ID | nvarchar(20) |  |  |  |
| Program | nvarchar(20) |  |  |  |
| Source | nvarchar(30) |  |  |  |
| Oppor\_Rein | nvarchar(20) |  |  |  |
| Reject\_reason | nvarchar(40) |  |  |  |
| Date\_Rejected | datetime |  |  |  |
|  |  |  |  |  |

### EC. Quality\_Coaching\_Fact

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Eval\_ID | nvarchar(20) |  |  |  |
| Eval\_Date | datetime |  |  |  |
| Eval\_Site\_ID | int |  |  |  |
| User\_ID | nvarchar(20) |  |  |  |
| User\_EMPID | nvarchar(20) |  |  |  |
| User\_LANID | nvarchar(30) |  |  |  |
| SUP\_ID | nvarchar(20) |  |  |  |
| SUP\_EMPID | nvarchar(20) |  |  |  |
| MGR\_ID | nvarchar(20) |  |  |  |
| MGR\_EMPID | nvarchar(20) |  |  |  |
| Journal\_ID | nvarchar(30) |  |  |  |
| Call\_Date | datetime |  |  |  |
| Summary\_CallerIssues | nvarchar(max) |  |  |  |
| Coaching\_Goal\_Discussion | nvarchar(4000) |  |  |  |
| CSE | nvarchar(2) |  |  |  |
| Evaluator\_ID | nvarchar(20) |  |  |  |
| Program | nvarchar(20) |  |  |  |
| Source | nvarchar(30) |  |  |  |
| Oppor\_Rein | nvarchar(20) |  |  |  |
| Date\_Inserted | datetime |  |  |  |

### EC.Quality\_FileList

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| File\_SeqNum | int | IDENTITY(1,1) |  |  |
| File\_Name | nvarchar(260) |  |  |  |
| File\_LoadDate | datetime |  |  |  |
| Count\_Staged | int |  |  |  |
| Count\_Loaded | int |  |  |  |
| Count\_Rejected | int |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### EC.Outlier\_Coaching\_Stage

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Report\_ID | int |  |  |  |
| Report\_Code | nvarchar(20) |  |  |  |
| Form\_Type | nvarchar(20) |  |  |  |
| Source | nvarchar(60) |  |  |  |
| Form\_Status | nvarchar(30) |  |  |  |
| Event\_Date | datetime |  |  |  |
| Submitted\_Date | datetime |  |  |  |
| Start\_Date | datetime |  |  |  |
| Submitter\_LANID | nvarchar(30) |  |  |  |
| Submitter\_Name | nvarchar(30) |  |  |  |
| Submitter\_Email | nvarchar(50) |  |  |  |
| CSR\_LANID | nvarchar(30) |  |  |  |
| CSR\_EMPID | nvarchar(20) |  |  |  |
| CSR\_Site | nvarchar(20) |  |  |  |
| Program | nvarchar(30) |  |  |  |
| CoachReason\_Current\_Coaching\_Initiatives | nvarchar(20) |  |  |  |
| TextDescription | nvarchar(3000) |  |  |  |
| FileName | nvarchar(260) |  |  |  |
|  |  |  |  |  |

### EC.Outlier\_Coaching\_Rejected

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Report\_ID | int |  |  |  |
| Report\_Code | nvarchar(20) |  |  |  |
| Form\_Type | nvarchar(20) |  |  |  |
| Source | nvarchar(60) |  |  |  |
| Form\_Status | nvarchar(30) |  |  |  |
| Event\_Date | datetime |  |  |  |
| Submitted\_Date | datetime |  |  |  |
| Start\_Date | datetime |  |  |  |
| Submitter\_LANID | nvarchar(30) |  |  |  |
| Submitter\_Name | nvarchar(30) |  |  |  |
| Submitter\_Email | nvarchar(50) |  |  |  |
| CSR\_LANID | nvarchar(30) |  |  |  |
| CSR\_Site | nvarchar(20) |  |  |  |
| Program | nvarchar(30) |  |  |  |
| CoachReason\_Current\_Coaching\_Initiatives | nvarchar(20) |  |  |  |
| TextDescription | nvarchar(3000) |  |  |  |
| FileName | nvarchar(260) |  |  |  |
| Rejected\_Reason | nvarchar(200) |  |  |  |
| Rejected\_Date | datetime |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### EC.Outlier\_Coaching\_Fact

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Report\_ID | int |  |  |  |
| Report\_Code | nvarchar(20) |  |  |  |
| Form\_Type | nvarchar(20) |  |  |  |
| Source | nvarchar(60) |  |  |  |
| Form\_Status | nvarchar(30) |  |  |  |
| Event\_Date | datetime |  |  |  |
| Submitted\_Date | datetime |  |  |  |
| Start\_Date | datetime |  |  |  |
| Submitter\_LANID | nvarchar(30) |  |  |  |
| Submitter\_Name | nvarchar(30) |  |  |  |
| Submitter\_Email | nvarchar(50) |  |  |  |
| CSR\_LANID | nvarchar(30) |  |  |  |
| CSR\_Site | nvarchar(20) |  |  |  |
| Program | nvarchar(30) |  |  |  |
| CoachReason\_Current\_Coaching\_Initiatives | nvarchar(20) |  |  |  |
| TextDescription | nvarchar(3000) |  |  |  |
| FileName | nvarchar(260) |  |  |  |
|  |  |  |  |  |

### EC.Outlier\_FileList

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| File\_SeqNum | int | IDENTITY(1,1) |  |  |
| File\_Name | nvarchar(260) |  |  |  |
| File\_LoadDate | datetime |  |  |  |
| Count\_Staged | int |  |  |  |
| Count\_Loaded | int |  |  |  |
| Count\_Rejected | int |  |  |  |

### EC.Historical\_Dashboard\_ACL

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Datatype** | **Comment** | **PK** | **FK** |
| Row\_ID | int | IDENTITY(1,1) | x |  |
| User\_LanID | nvarchar(30) |  | x |  |
| User\_Name | nvarchar(30) |  |  |  |
| Role | nvarchar(30) | DEFAULT (N'ECL') |  |  |
| End\_Date | nvarchar(10) | DEFAULT (N'99991231') |  |  |
| Updated\_By | nvarchar(30) |  |  |  |
| IsAdmin | nvarchar(1) | DEFAULT (N'N') |  |  |

* 1. **eCoaching Procedures**

|  | **Procedure Name** | **Usage** |
| --- | --- | --- |
| 1. | sp\_Check\_AgentRole | Web interface: General |
| 2. | sp\_Dim\_Date\_Add\_Date\_Range | Maintenance: Date DIM |
| 3. | sp\_Dim\_Date\_Add\_Unknown\_Row | Maintenance: Date DIM |
| 4. | sp\_InsertInto\_Coaching\_Log | Web interface: Record Add |
| 6. | sp\_InsertInto\_Coaching\_Log\_Outlier | Load: Outliers Data |
| 7. | sp\_InsertInto\_Coaching\_Log\_Quality | Load: Quality Data |
| 8. | sp\_InsertInto\_Outlier\_Rejected | Load: Outliers Data |
| 9. | sp\_Populate\_Employee\_Hierarchy | Load: Employee Data |
| 10. | sp\_SelectCoaching4Contact | Load: Notification process for Quality and Outlier logs |
| 11. | sp\_SelectCSRsbyLocation | Web interface: Record Add |
| 12. | sp\_SelectFrom\_Coaching\_Log\_CSRCompleted | Web interface: Dashboard: Main |
| 13. | sp\_SelectFrom\_Coaching\_Log\_CSRPending | Web interface: Dashboard: Main |
| 14. | sp\_SelectFrom\_Coaching\_Log\_HistoricalSUP | Web interface: Dashboard: Historical |
| 15. | sp\_SelectFrom\_Coaching\_Log\_MGRCSRCompleted | Web interface: Dashboard: Main |
| 16. | sp\_SelectFrom\_Coaching\_Log\_MGRCSRPending | Web interface: Dashboard: Main |
| 17. | sp\_SelectFrom\_Coaching\_Log\_MGRPending | Web interface: Dashboard: Main |
| 18. | sp\_SelectFrom\_Coaching\_Log\_MyCompSubmitted\_DashboardStaff | Web interface: Dashboard: My Submissions |
| 19. | sp\_SelectFrom\_Coaching\_Log\_MyPenSubmitted\_DashboardStaff | Web interface: Dashboard: My Submissions |
| 20. | sp\_SelectFrom\_Coaching\_Log\_MySubmitted\_Dashboard | Web interface: Dashboard: My Submissions |
| 21. | sp\_SelectFrom\_Coaching\_Log\_MySubmitted\_DashboardMGR | Web interface: Dashboard: My Submissions |
| 22. | sp\_SelectFrom\_Coaching\_Log\_MySubmitted\_DashboardSUP | Web interface: Dashboard: My Submissions |
| 23. | sp\_SelectFrom\_Coaching\_Log\_SUPCSRCompleted | Web interface: Dashboard: Main |
| 24. | sp\_SelectFrom\_Coaching\_Log\_SUPCSRPending | Web interface: Dashboard: Main |
| 25. | sp\_SelectFrom\_Coaching\_Log\_SUPPending | Web interface: Dashboard: Main |
| 26. | sp\_SelectFrom\_Coaching\_LogDistinctCSRCompleted | Web interface: Dashboard: Historical |
| 27. | sp\_SelectFrom\_Coaching\_LogDistinctCSRCompleted2 | Web interface: Dashboard: Historical |
| 28. | sp\_SelectFrom\_Coaching\_LogDistinctMGRCompleted | Web interface: Dashboard: Historical |
| 29. | sp\_SelectFrom\_Coaching\_LogDistinctMGRCompleted2 | Web interface: Dashboard: Historical |
| 30. | sp\_SelectFrom\_Coaching\_LogDistinctSUPCompleted | Web interface: Dashboard: Historical |
| 31. | sp\_SelectFrom\_Coaching\_LogDistinctSUPCompleted2 | Web interface: Dashboard: Historical |
| 32. | sp\_SelectFrom\_Coaching\_LogMgrDistinctCSR | Web interface: Dashboard: Main |
| 33. | sp\_SelectFrom\_Coaching\_LogMgrDistinctCSRSubmitted | Web interface: Dashboard: My Submissions |
| 34. | sp\_SelectFrom\_Coaching\_LogMgrDistinctCSRTeam | Web interface: Dashboard: Main |
| 35. | sp\_SelectFrom\_Coaching\_LogMgrDistinctCSRTeamCompleted | Web interface: Dashboard: Main |
| 36. | sp\_SelectFrom\_Coaching\_LogMgrDistinctMGRSubmitted | Web interface: My Submissions |
| 37. | sp\_SelectFrom\_Coaching\_LogMgrDistinctSUP | Web interface: Dashboard: Main |
| 38. | sp\_SelectFrom\_Coaching\_LogMgrDistinctSUPSubmitted | Web interface: Dashboard: My Submissions |
| 39. | sp\_SelectFrom\_Coaching\_LogMgrDistinctSUPTeam | Web interface: Dashboard: Main |
| 40. | sp\_SelectFrom\_Coaching\_LogMgrDistinctSUPTeamCompleted | Web interface: Dashboard: Main |
| 41. | sp\_SelectFrom\_Coaching\_LogStaffDistinctCompletedCSRSubmitted | Web interface: Dashboard: My Submissions |
| 42. | sp\_SelectFrom\_Coaching\_LogStaffDistinctCompletedMGRSubmitted | Web interface: Dashboard: My Submissions |
| 43. | sp\_SelectFrom\_Coaching\_LogStaffDistinctCompletedSUPSubmitted | Web interface: Dashboard: My Submissions |
| 44. | sp\_SelectFrom\_Coaching\_LogStaffDistinctPendingCSRSubmitted | Web interface: Dashboard: My Submissions |
| 45. | sp\_SelectFrom\_Coaching\_LogStaffDistinctPendingMGRSubmitted | Web interface: Dashboard: My Submissions |
| 46. | sp\_SelectFrom\_Coaching\_LogStaffDistinctPendingSUPSubmitted | Web interface: Dashboard: My Submissions |
| 47. | sp\_SelectFrom\_Coaching\_LogSupDistinctCSR | Web interface: Dashboard: My Submissions |
| 48. | sp\_SelectFrom\_Coaching\_LogSupDistinctCSRTeam | Web interface: Dashboard: Main |
| 49. | sp\_SelectFrom\_Coaching\_LogSupDistinctCSRTeamCompleted | Web interface: Dashboard: Main |
| 50. | sp\_SelectFrom\_Coaching\_LogSupDistinctMGR | Web interface: Dashboard: My Submissions |
| 51. | sp\_SelectFrom\_Coaching\_LogSupDistinctMGRTeamCompleted | Web interface: Dashboard: Main |
| 52. | sp\_SelectFrom\_Coaching\_LogSupDistinctSUP | Web interface: Dashboard: My Submissions |
| 53. | sp\_SelectRecordStatus | Web interface: Review Coaching logs |
| 54. | sp\_SelectReviewFrom\_Coaching\_Log | Web interface: Review Coaching logs |
| 55. | sp\_Update\_CSR\_Hierarchy | Load: Employee Data |
| 56. | sp\_Update\_Employee\_Hierarchy\_Stage | Load: Employee Data |
| 57. | sp\_Update\_EmployeeID\_To\_LanID | Load: Employee Data |
| 58. | sp\_Update\_Migrated\_User\_Logs | Housekeeping: Migrated user log update |
| 59. | sp\_Update1Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 60. | sp\_Update2Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 61. | sp\_Update3Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 62. | sp\_Update4Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 63. | sp\_Update5Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 64. | sp\_Update6Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 65. | sp\_Update7Review\_Coaching\_Log | Web interface: Review Coaching logs |
| 66. | sp\_UpdateFeedMailSent | Load: Notification process for Quality and Outlier logs |
| 67. | sp\_Whoami | Web interface: General |
| 68. | sp\_Whoisthis | Web interface: General |
| 69. | sp\_DeleteFromHistoricalDashboardACL | Web interface: ACL App |
| 70. | sp\_InactivateCoachingLogsForTerms | Housekeeping: Inactivate logs for Termed users. Run as part of employee data Load. |
| 71. | sp\_InsertInto\_Historical\_Dashboard\_ACL | Web interface: ACL App |
| 72. | sp\_SelectFrom\_Historical\_Dashboard\_ACL | Web interface: ACL App |
| 73. | sp\_Update\_Coaching\_Log\_Quality | Load: Quality Data |
| 74. | sp\_UpdateHistorical\_Dashboard\_ACL | Web interface: ACL App |
| 75. | sp\_Update\_Quality\_Fact | Load: Quality Data |
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|  |  |  |
|  |  |  |
|  |  |  |

* 1. **eCoaching Functions**

|  | **Function Name** | **Description** |
| --- | --- | --- |
| 1. | fn\_dtYYYYMMDD\_to\_Datetime | Given an integer representing a date in format YYYYMMDD, return the corresponding datetime value. |
| 2. | fn\_intDatetime\_to\_YYYYMMDD | Given a datetime value, return an integer in format YYYYMMDD representing the date. |
| 3. | fn\_intGetSiteIDFromLanID | Given an LAN ID and a date, returns the Employee ID of the person who had that LAN ID on that date.  The Employee ID is then used to look up the site and site ID of the user. |
| 4. | fn\_intSiteIDFromEmpID | Given an Employee ID returns the Employee site ID. |
| 5. | fn\_intSiteIDFromSite | Given the Site Name returns the Site ID. |
| 6. | fn\_intSourceIDFromOldSource | Given the Old Form Type and Source value returns the Source ID. |
| 7. | fn\_intSubCoachReasonIDFromRptCode | Given the 3 letter Outlier Report code returns the Sub coaching reason for the OMR log. |
| 8. | fn\_nvcGetEmpIdFromLanId | Given an LAN ID and a date, return the Employee ID of the person who had that LAN ID on that date. |
| 9. | fn\_nvcHtmlEncode | Encodes special characters that can pose a security risk when sent to front end. |
| 10. | fn\_strAddSpaceToName | Given an Employee Name Adds a space after the comma that separates the Last Name and the First Name. |
| 11. | fn\_strMgrEmpIDFromEmpID | Given an Employee ID returns the Manager Employee ID. Looks up the Supervior ID of the Employee's Supervisor. |
| 12. | fn\_strSiteNameFromSiteLocation | Given a site location returns the site name |
| 13. | fn\_strStatusIDFromIQSEvalID | Given an IQS Eval ID determines the Status for the Coaching Log.  The Status is then used to look up the Status ID. |
| 14. | fn\_strStatusIDFromStatus | Given a Status returns the Status id from Status table. |
| 15. | fn\_strUserName | Given a LAN ID, fetches the User Name from the Employee Hierarchy table. |
| 16. | RemoveAlphaCharacters | Given an Employee ID or Other String removes the alpha characters  that exist in the first 2 Positions. |
| 17. |  |  |
| 18. |  |  |
| 19. |  |  |
| 20. |  |  |
| 21. |  |  |
| 22. |  |  |

1. **Reference Materials**

| **Document** | **Location** |
| --- | --- |
| Functional Specification |  |
| CRAD |  |
| Feed Layouts |  |
| Dimension Tables Create SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_Dimension\_Tables\_Create.sql |
| Dimension Table Data | \cms\eCoaching\_V2\Design\CCO\_eCoaching\_Database\_Diagram.docx |
| Coaching Log Insert and Dashboards Create SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_Log\_Create.sql |
| Functions Create SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_Functions.sql |
| Employee Hierarchy Create SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_EmployeeHierarchy\_Load.sql |
| Maintenance SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_Maintenance\_Create.sql |
| SQL Agent Jobs |  |
| Database Diagram | \cms\eCoaching\_V2\Design\CCO\_eCoaching\_Database\_Diagram.docx |
| Quality Insert SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_Quality\_Load\_Create.sql |
| OMR Insert SQL | \cms\eCoaching\_V2\Code\CCO\_eCoaching\_Outliers\_Load\_Create.sql |
| Employee Load Detail Design | \cms\eCoaching\_V2\Design\CCO\_eCoaching\_Employee\_Hierarchy\_ETL\_DD.doc |
| Quality Load Detail Design | \cms\eCoaching\_V2\Design\CCO\_eCoaching\_Quality\_ETL\_DD.docx |
| Outliers Load Detail Design | \cms\eCoaching\_V2\Design\CCO\_eCoaching\_Outliers\_ETL\_DD.docx |
|  |  |
| Database Implementation Runbook | C:\cms\eCoaching\_V2\Runbook\CCO\_eCoaching\_V2\_DB\_Implementation\_Plan.docx |
|  |  |

1. **Definitions and Acronyms**

CCO - Contact Center Operations

GDIT - General Dynamics Information Technology

eCL - Electronic Coaching Log

WFM - Workforce Management

PS - PeopleSoft

HR - Human Resources

OMR - Outliers Management reports

IQS - Interim Quality Solution

ETL - Extraction, Transformation, & Load