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**Title: eCoaching\_SDR\_Load**

**SSIS Detail Design Document**

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| --- | --- | --- |
| Last Revision | Last Review | Description |
| 03/08/2016 |  | Initial revision. TFS 1732. |

Prepared by: Susmitha Palacherla Date: 03/07/2016

Department, Location: Health Solutions Division

Approved by: Date:

**Change History Log**

| **Date** | **Change Description** | **Author** |
| --- | --- | --- |
| 03/07/2016 | 1.0 Initial revision. TFS 1732. | Susmitha Palacherla |
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Contents

[1. Overview 4](#_Toc430607349)

[1.1 Project Description 4](#_Toc430607350)

[1.2 Document Scope 4](#_Toc430607351)

[1.3 Source Files 4](#_Toc430607352)

[1.4 Module List 6](#_Toc430607353)

[1.5 Software and Hardware Interfaces 6](#_Toc430607354)

[1.5.1 Software 6](#_Toc430607355)

[1.5.2 Hardware 6](#_Toc430607356)

[1.6 Users 6](#_Toc430607357)

[2. Details 6](#_Toc430607358)

[2.1 Source Files 6](#_Toc430607361)

[2.2 Module Details 7](#_Toc430607362)

[2.2.1 SQL agent job 7](#_Toc430607363)

[2.2.2 SSIS Package 7](#_Toc430607364)

[2.2.3 Tables 82](#_Toc430607365)

[2.2.4 Procedures 82](#_Toc430607366)

[2.2.5 Functions 82](#_Toc430607367)

# Overview

## Project Description

The coaching process is a standard process to facilitate consistent communication when a performance opportunity exists. It provides a method to make a determination of whether coaching is needed, when to initiate coaching and verification that the performance issue has been addressed. The SDR feed contains records for TQC GDIT verified training when prescribed length of training session is completed much sooner than expected. SDR reports are created by the Quality team which identifies thresholds and exceptions that require coaching or further research by Call Center Supervisors. All items are entered into the eCL via a data feed. Utilizing the eCL work-flow, items can be tracked from start to finish to verify if items have been addressed. The eCL will also provide reporting on the number of SDR entered into the system, the number coached, pending coaching, pending review or reasons why coaching was not required.

## Document Scope

This document describes the load of the SDR reports provided by theQuality team into the eCoaching database. Once the reports are loaded into the database the logs are tracked through the workflow like any Coaching log entered from the web interface.

## Source Files

The table below shows the attributes for the SDR report.

Files have a naming convention eCL\_SDR\_yyyymmdd.csv

Files are staged at [\\VRIVSCORS01\BCC Scorecards\Coaching\SDR\](file:///\\VRIVSCORS01\BCC%20Scorecards\Coaching\Outliers\)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **#** | **Metric/Report** | **Active Feed** | **Code** | **eCL Workflow** | **Entry** | **Coaching Reason** |
| 1 | SDR: Short Duration Reporting |  | SDR | Direct Coach | Feed | Current Coaching Initiatives |

## Module List

* SQL agent job
* SSIS Package
* Tables
* Procedures

## Software and Hardware Interfaces

### Software

* SQL Server 2008 R2 SP1 Suite

### Hardware

* VRIVFSSDBT02\SCORD01,1437 – Dev DB Instance
* VRIVFSSDBT02\SCORT01,1438 – Test DB Instance
* VDENSSDBP07\SCORP01 – Prod DB Instance
* [\\VRIVSCORS01\BCC Scorecards\](file:///\\VRIVSCORS01\BCC%20Scorecards\) - File staging share

## Users

* The first set of users for the SDR records loaded into the eCL database are the CCO Supervisors as all records have default state of ‘Pending Supervisor Review’ at the time of the load.
* After a Supervisor reviews the log and determines that a Coaching is required the log gets assigned to the CSRs and they become the users.
* CCO Supervisors and Managers will be able to access the logs from the historical Dashboards.

# Details



## Source Files

eCL\_SDR\_yyyymmdd.csv is the naming convention for the feed.

Description: A file containing records for agents that fall below the required threshold time to complete a required training in TQC. The Quality team captures records that do not meet the SDR thresholds and generate a feed. Once the feed is loaded into eCL the Supervisor have the opportunity to determine if a Coaching is needed or additional research is needed.

Source system: TQC

* Staging location: [\\vrivscors01\BCC Scorecards\Coaching\SDR\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\Outliers\)
* File name eCL\_SDR\_yyyymmdd.csv
* Frequency: File is expected to be placed on the share on Thursdays
* File arrival time: NA
* Destination Table: Coaching\_Log and Coaching\_Log\_Reason

## Module Details

### SQL agent job

* Production Instance : VDENSSDBP07\SCORP01
* Production Job: SDRCoaching
* Production Package: [\\VDENSSDBP07\scorecard-ssis\Coaching\SDR\_Coaching.dtsx](file:///\\VDENSSDBP07\scorecard-ssis\Coaching\Outlier_Coaching.dtsx)
* Production Config File: Prod\_SDR\_Coaching.dtsConfig
* Owner: jobs\_admin
* Run As: BccScrdSQLAgent
* Schedule: Fridays 8:00 AM EST IF Files exist to be loaded
* Destination File Location: N/A

### SSIS Package

* + - 1. **Variables**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Scope** | **DataType** | **Value** |
| FilebakPath | SDR\_Coaching | String | \\vrivscors01\BCC Scorecards\Coaching\SDR\Backups |
| FileNum | SDR\_Coaching | Int32 | 0 |
| FilePath | SDR\_Coaching | String | \\vrivscors01\BCC Scorecards\Coaching\SDR |
| varDBName | SDR\_Coaching | String | Dev |
| varFileName | SDR\_Coaching | String |  |
| FailMessage | SDR\_Coaching | String | SDR Coaching Load failed in Dev |
| StagedCount | SDR\_Coaching | Int32 | 0 |
| RejectedCount | SDR\_Coaching | Int32 | 0 |
| LoadedCount | SDR\_Coaching | Int32 | 0 |
|  |  |  |  |

* + - 1. **Connection Manager Entries**
         1. Destinationdb
* Dev - VRIVFSSDBT02\SCORD01,1437) DB – eCoachingdev
* Prod - VDENSSDBP07\SCORP01 DB – eCoaching



* + - * 1. SDR\_File
* \\vrivscors01\bcc scorecards\Coaching\SDR\eCL\_SDR\_\*.csv



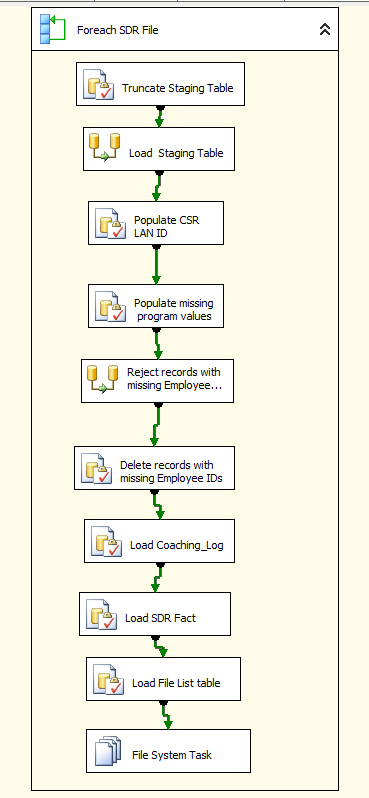


* + - * 1. SMTP Connection Manager

smtpout.gdit.com



* + - 1. **Package Content(Control Flow)**



**Workflow**

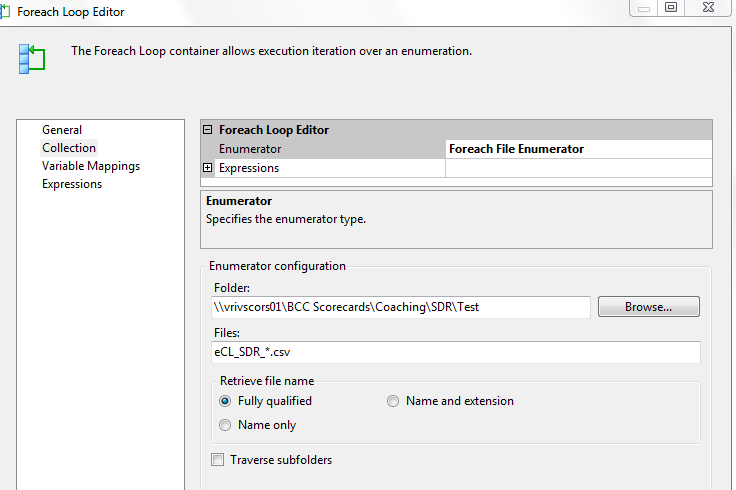
* + - * 1. **For each SDR file in Staging directory Workflow**

Container: Foreach Loop

Folder: \\vrivscors01\BCC Scorecards\Coaching\SDR

Files: eCL\_SDR\_\*.csv







**Summary of Steps**

1. SQL task – Truncate SDR Staging table
2. DFT – Stage SDR Staging table
3. SQL task – Populate CSR LAN ID for LCS
4. SQL Task – Populate missing Program Values
5. DFT Rejected records with missing Employee attributes
6. SQL task – Delete records with missing employee ID from Staging table
7. SQL task Load coaching\_Log and Coaching\_Log\_Reason tables
8. SQL task – Load SDR Fact table
9. SQL task – Load File list table
10. File system task – Backup files to Backups directory

**Details of Steps**

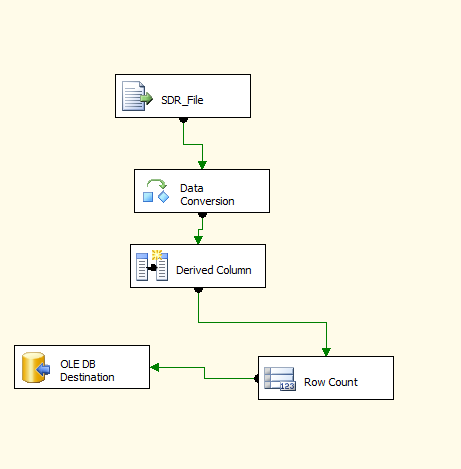
1. SQL task – Truncate SDR Staging table



Executes Truncate Table [EC].[SDR\_Coaching\_Stage]

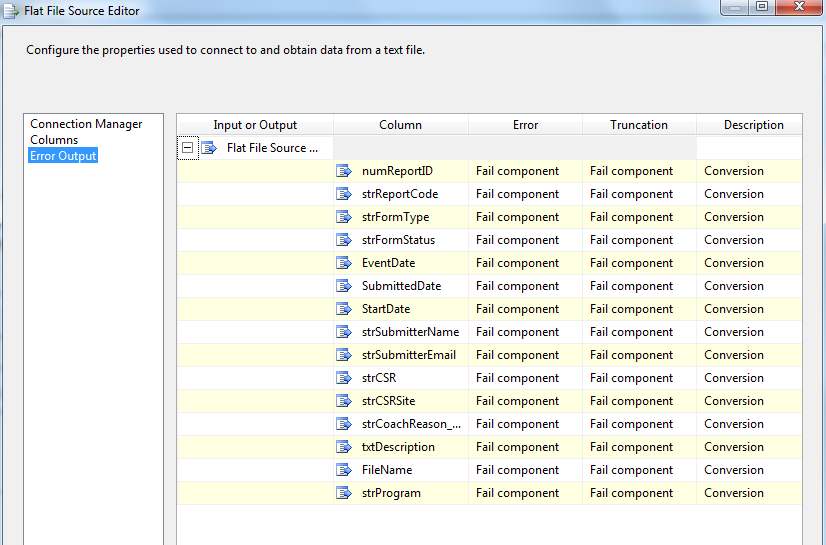
1. DFT: Load SDR staging table

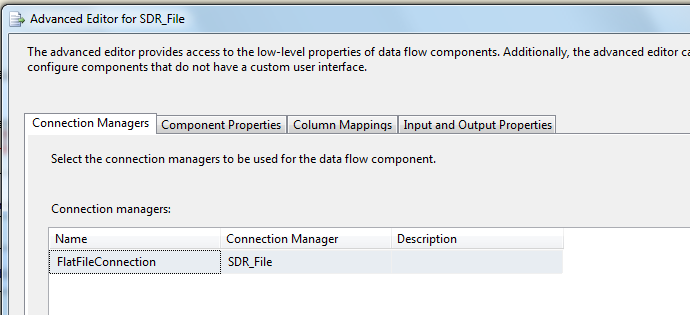


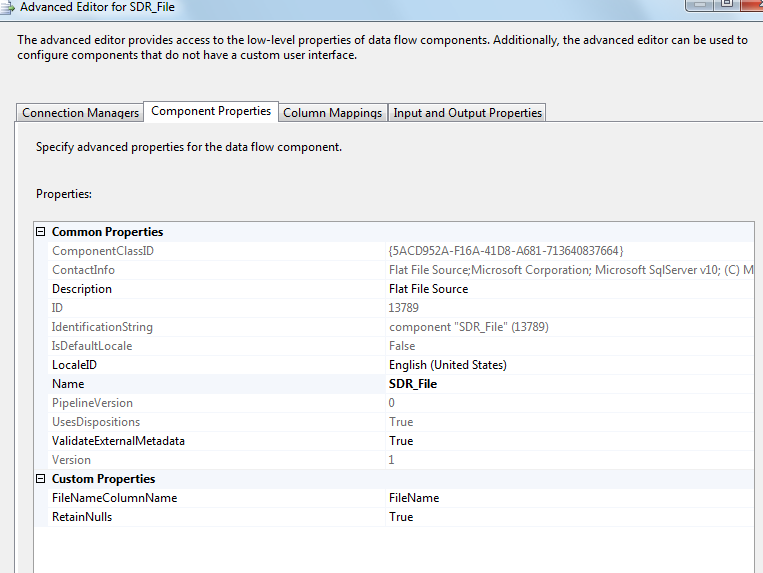


1. Flat File source





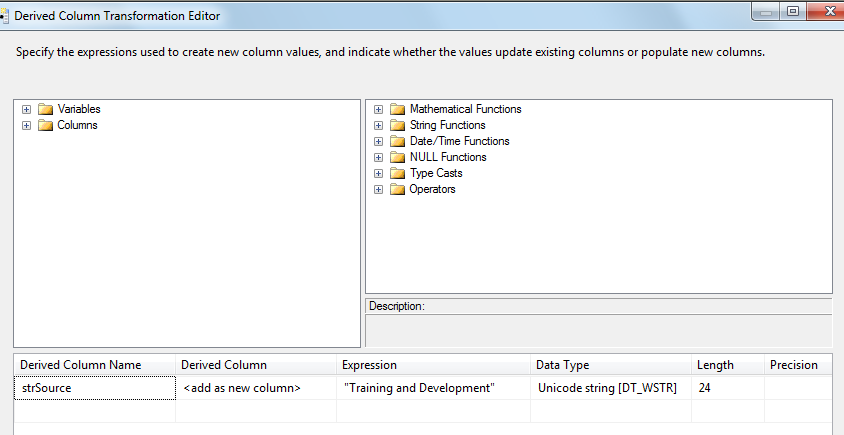




1. Data Conversion



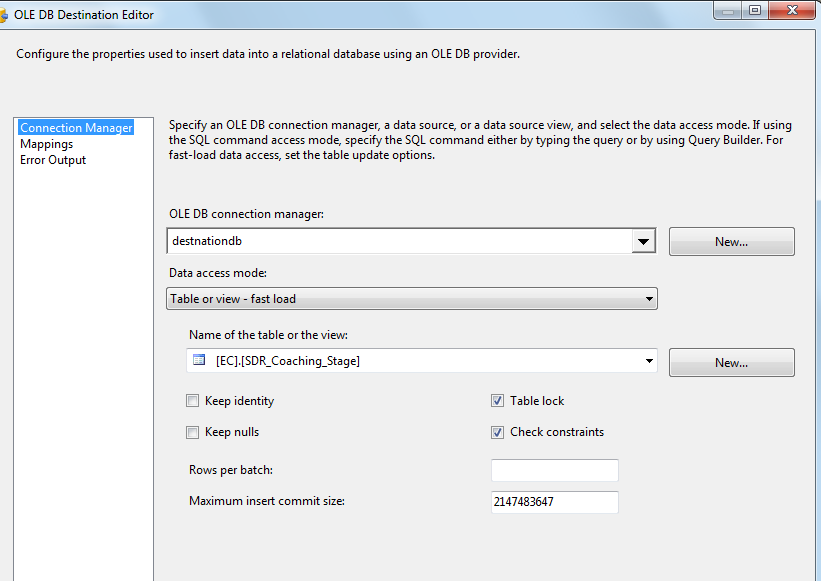
1. Derived Column

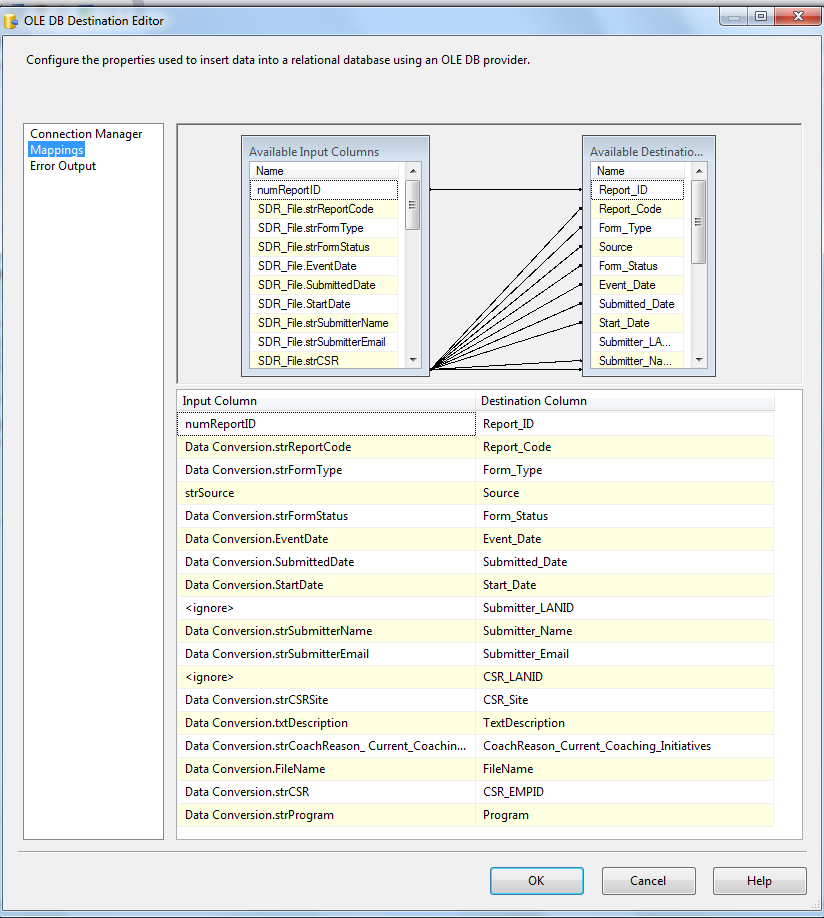


1. Row Count Transformation



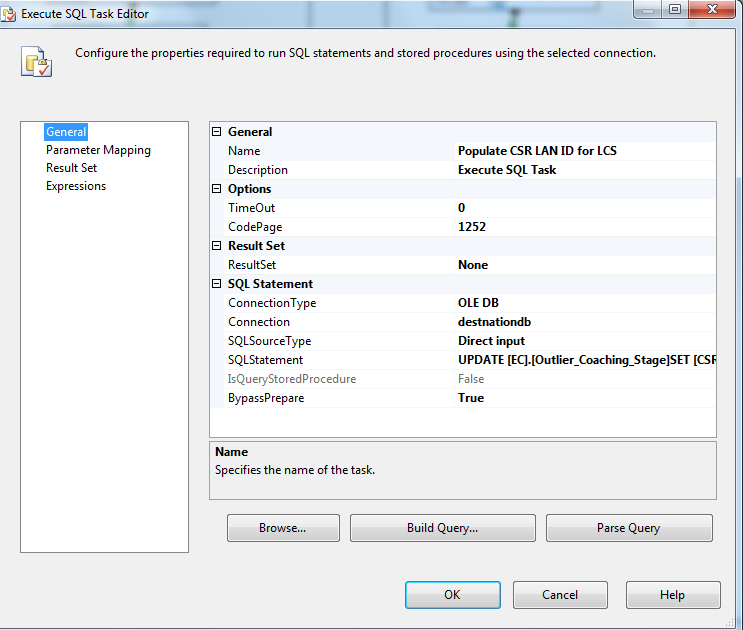
1. Oledb destination







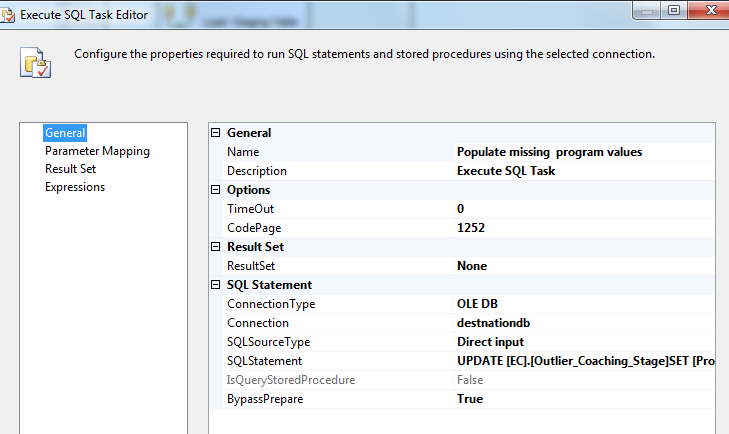
1. SQL Task: Populate CSR LAND ID



UPDATE [EC].[SDR\_Coaching\_Stage]

SET [CSR\_LANID]= [EC].[fn\_strEmpLanIDFromEmpID]([CSR\_EMPID])

1. SQL Task: Populate missing program values



UPDATE [EC].[SDR\_Coaching\_Stage]

SET [Program]= H.[Emp\_Program]

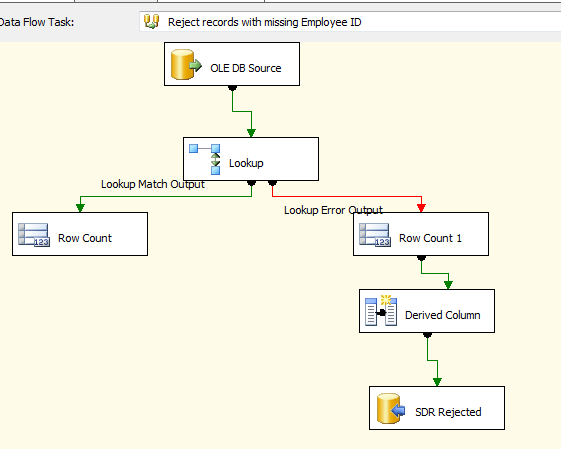
FROM [EC].[sdr\_Coaching\_Stage]S JOIN [EC].[Employee\_Hierarchy]H

ON S.[CSR\_EMPID]=H.[Emp\_ID]

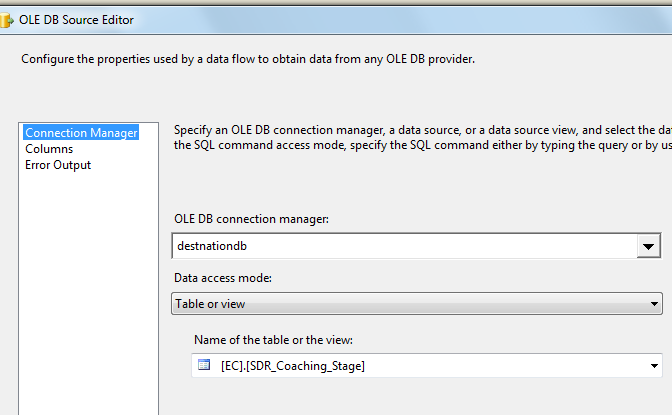
WHERE (S.Program IS NULL OR S.Program ='')

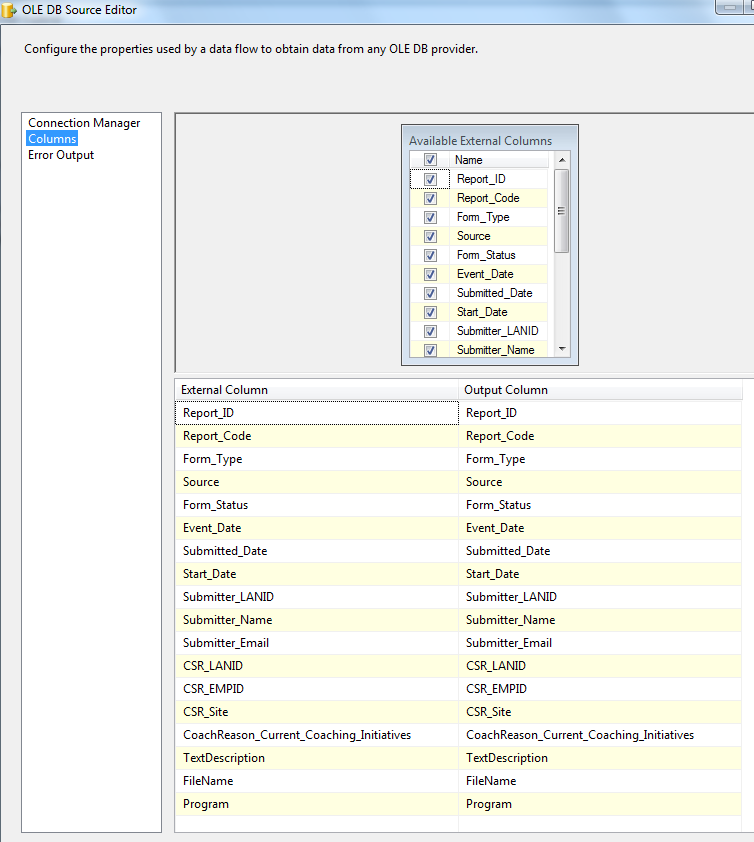
1. DFT: Reject Records with Missing Employee ID





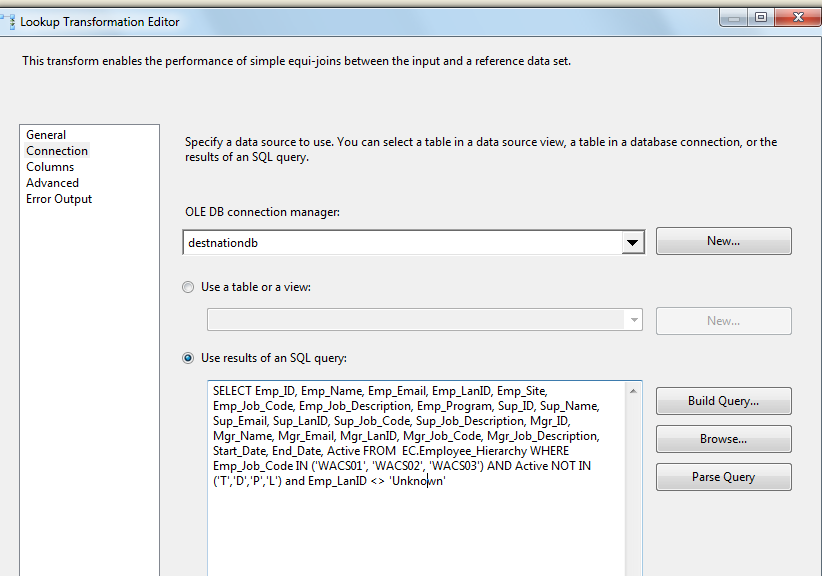
1. Oledb source





1. Lookup Transformation





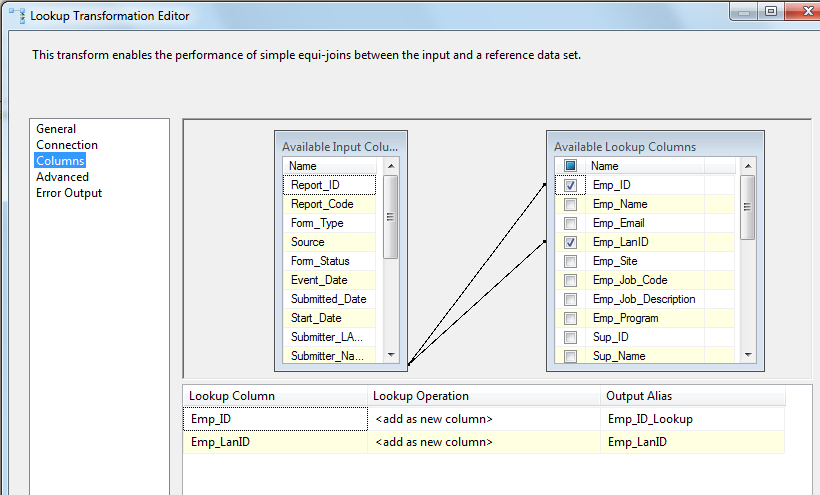
SELECT Emp\_ID, Emp\_Name, Emp\_Email, Emp\_LanID, Emp\_Site, Emp\_Job\_Code, Emp\_Job\_Description,

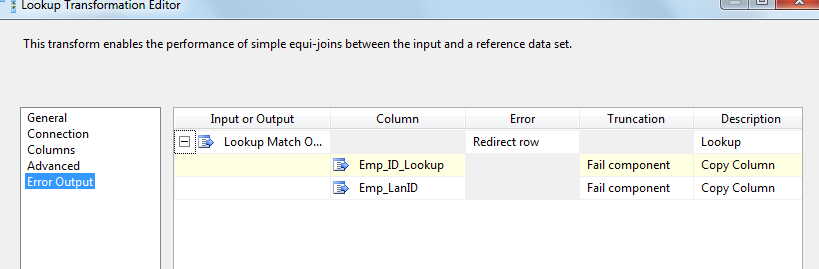
Emp\_Program, Sup\_ID, Sup\_Name, Sup\_Email, Sup\_LanID, Sup\_Job\_Code, Sup\_Job\_Description,

Mgr\_ID, Mgr\_Name, Mgr\_Email, Mgr\_LanID, Mgr\_Job\_Code, Mgr\_Job\_Description, Start\_Date, End\_Date, Active

FROM EC.Employee\_Hierarchy

WHERE Emp\_Job\_Code IN ('WACS01', 'WACS02', 'WACS03')

AND Active NOT IN ('T','D','P','L') and Emp\_LanID <> 'Unknown'



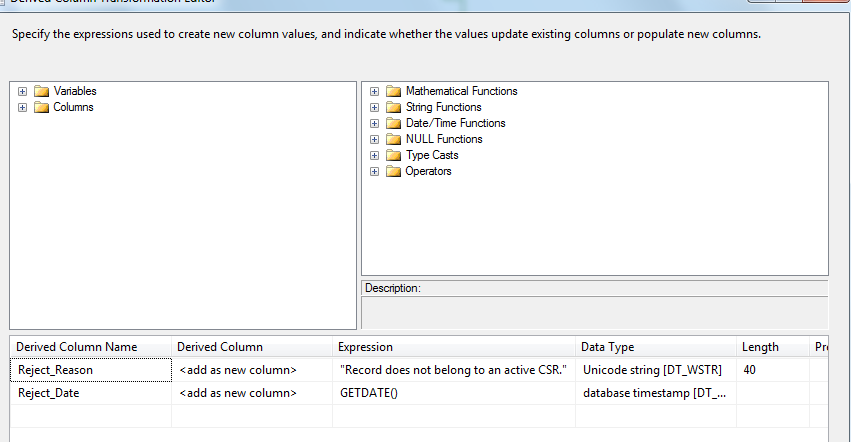
1. Lookup Match Output – Row Count Transformation to get Loaded Count



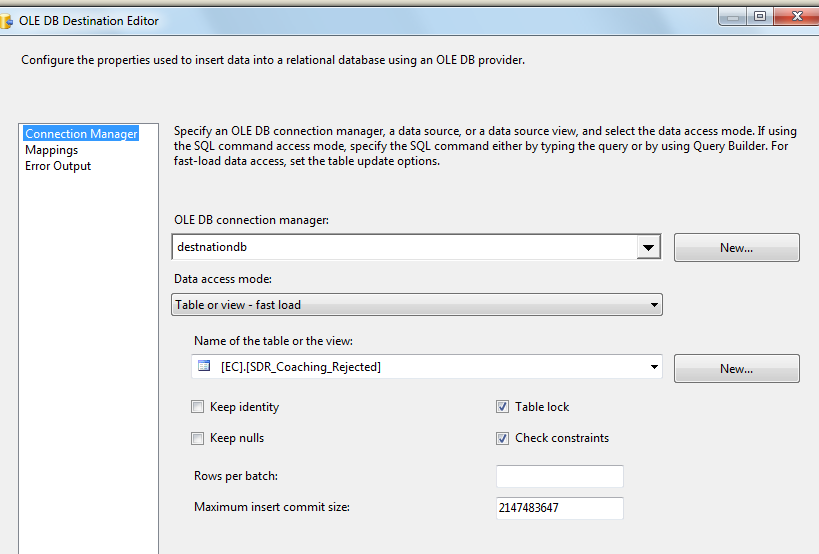
Lookup Transformation No Match Output – Row Count Transformation to get Rejected Count



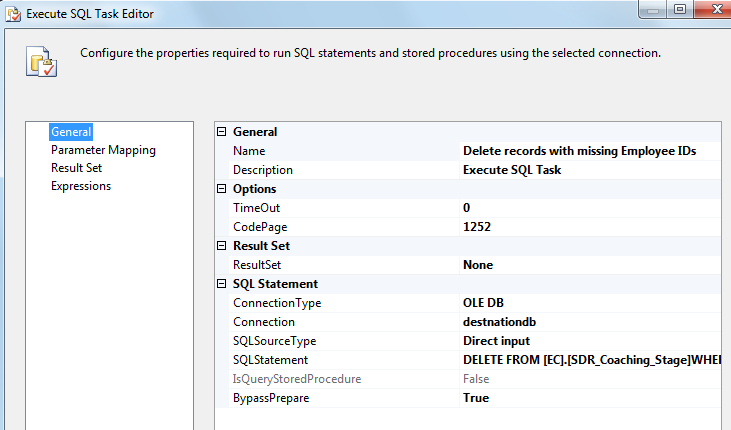
Derived Column – To get Reject Reason and Reject Date



oledb destination – Write rejected records to SDR rejected table



1. SQL Task: Delete records with missing Employee ID from Staging table



DELETE FROM [EC].[SDR\_Coaching\_Stage]

WHERE [CSR\_EMPID] IS NULL OR [CSR\_EMPID] ='' OR [CSR\_LANID] = 'Unknown'

DELETE os FROM

[EC].[SDR\_Coaching\_Stage] os JOIN [EC].[Employee\_Hierarchy] eh

ON os.CSR\_EMPID = eh.Emp\_ID

WHERE eh.Emp\_Job\_Code not in ('WACS01','WACS02','WACS03')

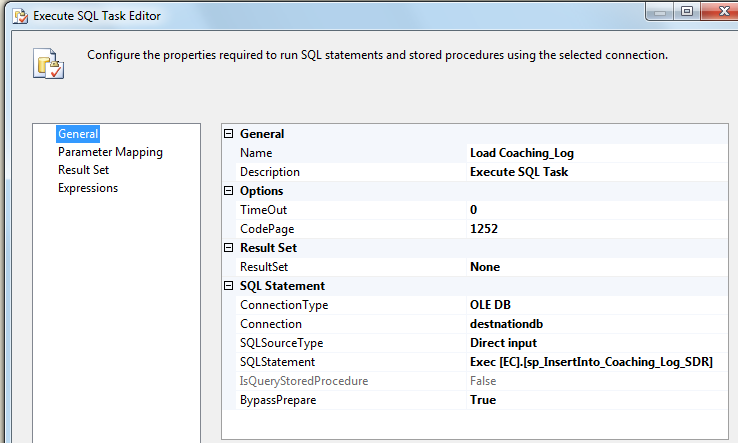
OR Active in ('T','D','L','P')

GO

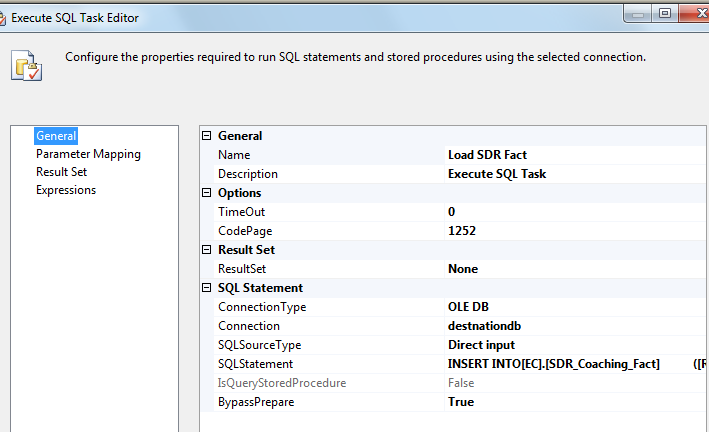
1. SQL Task: Load Coaching\_Log table



Executes Exec [EC].[sp\_InsertInto\_Coaching\_Log\_SDR]



1. SQl Task: Load SDR Fact table



INSERT INTO[EC].[SDR\_Coaching\_Fact]

([Report\_ID]

,[Report\_Code]

,[Form\_Type]

,[Source]

,[Form\_Status]

,[Event\_Date]

,[Submitted\_Date]

,[Start\_Date]

,[Submitter\_LANID]

,[Submitter\_Name]

,[Submitter\_Email]

,[CSR\_LANID]

,[CSR\_Site]

,[Program]

,[CoachReason\_Current\_Coaching\_Initiatives]

,[TextDescription]

,[FileName]

)

SELECT S.[Report\_ID]

,S.[Report\_Code]

,S.[Form\_Type]

,S.[Source]

,S.[Form\_Status]

,S.[Event\_Date]

,S.[Submitted\_Date]

,S.[Start\_Date]

,S.[Submitter\_LANID]

,S.[Submitter\_Name]

,S.[Submitter\_Email]

,S.[CSR\_LANID]

,S.[CSR\_Site]

,S.[Program]

,S.[CoachReason\_Current\_Coaching\_Initiatives]

,S.[TextDescription]

,S.[FileName]

FROM [EC].[SDR\_Coaching\_Stage]S LEFT OUTER JOIN [EC].[SDR\_Coaching\_Fact]F

ON S.[Report\_ID]=F.[Report\_ID]

AND S.Report\_Code = F.Report\_Code

WHERE F.[Report\_ID] IS NULL AND F.Report\_Code IS NULL

GO

1. SQL Task: Load SDR File List table







Executes the following sql

INSERT INTO [EC].[SDR\_FileList]

([File\_Name]

,[File\_LoadDate]

,[Count\_Staged]

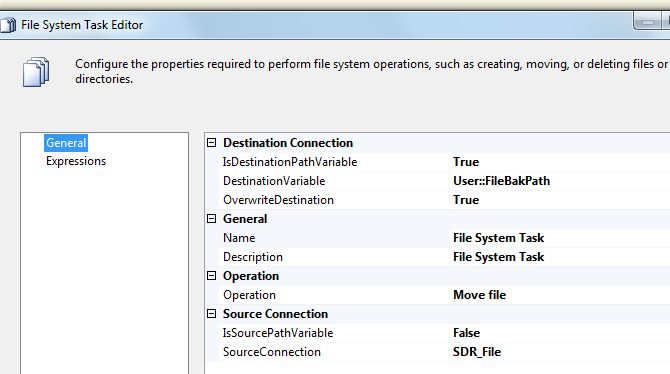
,[Count\_Loaded]

,[Count\_Rejected])

VALUES (?,GetDate(), ?, ?,?)

1. File System Task: Move file to backup folder

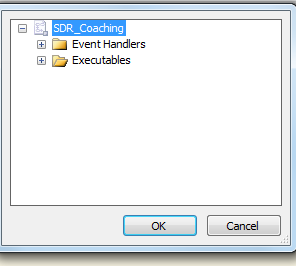


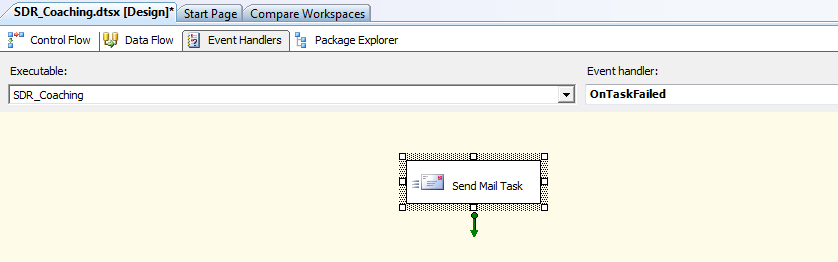


* + - 1. **Package Content(Event Handlers)**

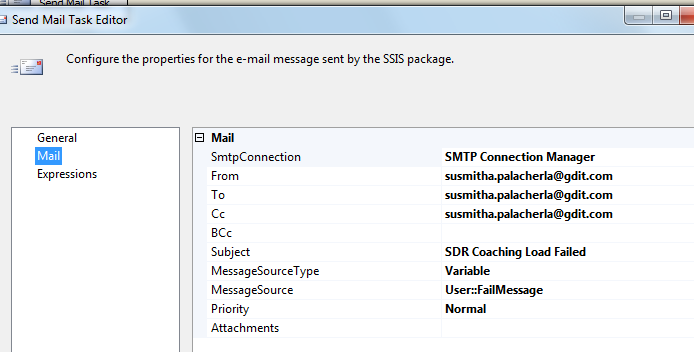
Executables: SDR\_Coaching

EventHandler: OntaskFailed









### Tables

|  | **Table Name** | **Table Description** |
| --- | --- | --- |
| 1. | SDR\_Coaching\_Stage | Table used for staging the SDR records during the insert into Coaching\_Log table. |
| 2. | SDR\_Coaching\_Rejected | Table used for storing the rejected SDR records during the insert into Coaching\_Log table. Logs are rejected when an incoming Lan ID does not exist in the Employee\_Hierarchy table. |
| 3. | SDR\_Coaching\_Fact | Table used for storing SDR source records loaded into the Coaching Log table. |
| 4. | SDR\_FileList | Table used for storing the SDR file names and Load dates. |

Table structure and details in document: eCoaching\_Database\_DD.docx

### Procedures

|  | **Procedure Name** | **Usage** |
| --- | --- | --- |
| 1. | sp\_InsertInto\_Coaching\_Log\_SDR | Load: SDR Data |

### Functions

|  | **FunctionName** | **Usage** |
| --- | --- | --- |
| 1. | fn\_intSubCoachReasonIDFrSDRptCode | Load: SDR Data |

Reference Document for Objects and Code: eCoaching\_SDR\_Create.sql