**eCoaching Log System**

**Coaching Summary Report**

**SSIS Detail Design Document**

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|  |  |  |
| --- | --- | --- |
| Last Revision | Last Review | Description |
| 5/27/2021 |  | TFS 21276 - Update QN Alt Channels compliance and mastery levels |

Prepared by: eCoaching Engineering Team Date: 10/10/2017

Approved by: Date:

**Change History Log**

| **Date** | **Change Description** | **Author** |
| --- | --- | --- |
| 10/10/2017 | TFS 6066 – Initial revision - Schedule Coaching Summary Reports | Susmitha Palacherla |
| 10/16/2017 | TFS 6066 – Schedule Coaching Summary Reports. Added delay before File copy. Updated destination and added schedule info | Susmitha Palacherla |
| 04/02/2019 | TFS 13333- Reporting changes to support Quality Now. | Susmitha Palacherla |
| 07/10/2019 | TFS 14706 - Switch smtpout.gdit.com to ironport.maximus.com | Susmitha Palacherla |
| 09/09/2019 | TFS 13644 – Incorporate a follow-up process for eCoaching submissions | Susmitha Palacherla |
| 7/29/2020 | TFS 17716 - Removed company specific references | Susmitha Palacherla |
| 4/19/2021 | TFS 20677 - AD island to AD AWS environment changes | Susmitha Palacherla |
| 5/27/2021 | TFS 21276 - Update QN Alt Channels compliance and mastery levels | Susmitha Palacherla |
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# Overview

## Project Description

The eCoaching Log (eCL) is an internal GDIT process designed for the entry and storage of the coaching notes that supervisors, managers, Advanced Resolution Center (ARC) CSRs and quality leads make regarding CSR performance. These notes are gathered through escalations, floor walking, training, quality monitors. It also provides a repository of coaching notes to generate reports for management.

## Document Scope

This document describes the process for generating and posting Coaching Summary reports by Module for the previous month for Program team to use.

## Input

* Procedure [EC].[sp\_rptCoachingSummaryForModule] on eCoaching DB on F3420-ECLDBP01

## Output(s)

### Original Report Names

* eCL\_CoachingSummary\_CSR\_YYYYMMDD\_YYYYMMDDD.csv
* eCL\_CoachingSummary\_Supervisor\_YYYYMMDD\_YYYYMMDDD.csv
* eCL\_CoachingSummary\_Quality\_YYYYMMDD\_YYYYMMDDD.csv
* eCL\_CoachingSummary\_LSA\_YYYYMMDD\_YYYYMMDDD.csv
* eCL\_CoachingSummary\_Training\_YYYYMMDD\_YYYYMMDDD.csv
* eCL\_CoachingSummary\_QN\_CSR\_ YYYYMMDD\_YYYYMMDDD.csv

### Encrypted Report Names

* eCL\_CoachingSummary\_CSR\_CCYYMMDD\_CCYYMMDD.csv.zip.encrypt
* eCL\_CoachingSummary\_Supervisor\_CCYYMMDD\_CCYYMMDD.csv.zip.encrypt
* eCL\_CoachingSummary\_Quality\_CCYYMMDD\_CCYYMMDD.csv.zip.encrypt
* eCL\_CoachingSummary\_LSA\_CCYYMMDD\_CCYYMMDD.csv.zip.encrypt
* eCL\_CoachingSummary\_Training\_CCYYMMDD\_CCYYMMDD.csv.zip.encrypt
* eCL\_CoachingSummary\_QN\_CSR\_CCYYMMDD\_CCYYMMDD.csv.zip.encrypt

## Module List

* SQL agent job
* SSIS Package
* Procedures
* Functions

## Software and Hardware Interfaces

### Software

* SQL Server 2019 Suite (SSIS and SSRS)

### Hardware

* UVAADADSQL50CCO– Dev DB Server
* UVAADADSQL52CCO – Test DB Server
* UVAAPADSQL50CCO – Prod Server
* [\\UVAADADSQL50CCO\Reports\](file:///\\UVAADADSQL50CCO\Reports\) - Dev File staging share
* [\\UVAADADSQL52CCO\Reports\](file:///\\UVAADADSQL52CCO\Reports\) - Test File staging share
* [\\UVAAPADSQL50CCO\Reports\](file:///\\UVAAPADSQL50CCO\Reports\) - Prod File staging share

## Users

* Program Team

# Details



## Input

### Stored Procedure [EC].[sp\_rptCoachingSummaryForModule]

Procedure [EC].[sp\_rptCoachingSummaryForModule]

(@intModulein, @intBeginDate,@intEndDate)

\eCoaching\_V2\Code\DB\Stored Procedures\sp\_rptCoachingSummaryForModule.sql

### Stored Procedure [EC].[sp\_rptQNCoachingSummaryForModule]

Procedure [EC].[sp\_rptQNCoachingSummaryForModule]

(@intModulein, @intBeginDate,@intEndDate)

\eCoaching\_V2\Code\DB\Stored Procedures\sp\_rptQNCoachingSummaryForModule.sql

## Output

### Coaching Summary Report for CSR Module

* Description: Coaching Summary Report
* Module: CSR
* Status(es): All Except Inactive
* Date Range: Submitted in previous Month
* Delivery location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)
* File name: eCL\_Coaching\_Summary\_CSR\_YYYYMMDD\_YYYYMMDD.csv
* Frequency: 2 AM 3rd of each Month

### Coaching Summary Report for Supervisor Module

* Description: Coaching Summary Report
* Module: Supervisor
* Status(es): All Except Inactive
* Date Range: Submitted in previous Month
* Delivery location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)
* File name: eCL\_Coaching\_Summary\_Supervisor\_YYYYMMDD\_YYYYMMDD.csv
* Frequency: 2 AM 3rd of each Month

### Coaching Summary Report for Quality Module

* Description: Coaching Summary Report
* Module: Quality
* Status(es): All Except Inactive
* Date Range: Submitted in previous Month
* Delivery location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)
* File name: eCL\_Coaching\_Summary\_Quality\_YYYYMMDD\_YYYYMMDD.csv
* Frequency: 2 AM 3rd of each Month

### Coaching Summary Report for LSA Module

* Description: Coaching Summary Report
* Module: LSA
* Status(es): All Except Inactive
* Date Range: Submitted in previous Month
* Delivery location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)
* File name: eCL\_Coaching\_Summary\_LSA\_YYYYMMDD\_YYYYMMDD.csv
* Frequency: 2 AM 3rd of each Month

### Coaching Summary Report for Training Module

* Description: Coaching Summary Report
* Module: Training
* Status(es): All Except Inactive
* Date Range: Submitted in previous Month
* Delivery location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)
* File name: eCL\_Coaching\_Summary\_Training\_YYYYMMDD\_YYYYMMDD.csv
* Frequency: 2 AM 3rd of each Month

### QN Coaching Summary Report for CSR Module

* Description: QN Coaching Summary Report
* Module: CSR
* Status(es): All Except Inactive
* Source(s): Verint-CCO and Verint-CCO Supervisor
* Date Range: Submitted in previous Month
* Delivery location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)
* File name: eCL\_Coaching\_Summary\_CSR\_QN\_YYYYMMDD\_YYYYMMDD.csv
* Frequency: 2 AM 3rd of each Month

## Module Details

### SQL agent job

* Production Instance : F3420-ECLDBP01
* Production Job: CoachingSummaryReport
* Production Package: [\\UVAAPADSQL50CCO\ssis\Coaching\Packages\CoachingSummaryReport.dtsx](file:///\\F3420-ECLDBP01\ssis\Coaching\Packages\CoachingSummaryReport.dtsx)
* Production Config File: Prod\_CoachingSummaryReport.dtsConfig
* Owner: ecljobowner
* Run As: ECLProxy (ECL Credential using application service account AD\SVC-F3420-APPECP01
* Schedule: 2 AM 3rd of each Month
* Destination File Location: [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)

### SSIS Package

#### Variables

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **DataType** | **Value** | **Evaluate as Expression** |
| Adhoc | Boolean | False |  |
| BackupsDir | String | [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)Backups\  \*set from config file |  |
| BeginDate | Int32 | [0](mailto:Susmitha.palacherla@gdit.com)  \*set from config file or fetched from SP depending on value of ‘Adhoc’ variable |  |
| CCEmail | String | [Susmitha.palacherla@gdit.com](mailto:Susmitha.palacherla@gdit.com)  \*set from config file | False |
| CSRPull | String | Exec [EC].[sp\_rptCoachingSummaryForModule]1,0,0 | "Exec [EC].[sp\_rptCoachingSummaryForModule]1," +(DT\_WSTR,20) @[User::BeginDate] + "," + (DT\_WSTR,20) @[User::EndDate] |
| CSRQNPull | String | Exec [EC].[sp\_rptQNCoachingSummaryForModule]1,0,0 | "Exec [EC].[sp\_rptQNCoachingSummaryForModule]1," +(DT\_WSTR,20) @[User::BeginDate] + "," + (DT\_WSTR,20) @[User::EndDate] |
| DecryptInDir | String | [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)Decrypt\_In\ |  |
| DecryptOutDir | String | [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)Decrypt\_Out\ |  |
| EncryptInDir | String | [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)Encrypt\_In |  |
| EncryptOutDir | String | [\\UVAAPADSQL50CCO\Reports\](file:///\\F3420-ECLDBP01\Reports\)Encrypt\_Out |  |
| EndDate | Int32 | [0](mailto:Susmitha.palacherla@gdit.com)  \*set from config file or fetched from SP depending on value of ‘Adhoc’ variable |  |
| Env | String | PROD |  |
| FromEmail | String | [Susmitha.palacherla@gdit.com](mailto:Susmitha.palacherla@gdit.com)  \*set from config file |  |
| LSAPull | String | Exec [EC].[sp\_rptCoachingSummaryForModule]4,0,0 | "Exec [EC].[sp\_rptCoachingSummaryForModule]4," +(DT\_WSTR,20) @[User::BeginDate] + "," + (DT\_WSTR,20) @[User::EndDate] |
| MsgEmail | String | The Reports have been posted to \\UVAAPADSQL50CCO\data\Coaching\Reports\      Thanks,  CCO Engineering General Dynamics Information Technology | "The Reports have been posted to " + @[User::ReportsDir] + "\r\n" +  " " + "\r\n" +  " " + "\r\n" +  "Thanks," + " " + "\r\n" +  "CCO Engineering" + " " + "\r\n" +  "General Dynamics Information Technology" |
| QualityPull | String | Exec [EC].[sp\_rptCoachingSummaryForModule]3,0,0 | "Exec [EC].[sp\_rptCoachingSummaryForModule]3," +(DT\_WSTR,20) @[User::BeginDate] + "," + (DT\_WSTR,20) @[User::EndDate] |
| ReportPeriod | String |  | (SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "01" ? "January" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "02" ? "February" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "03" ? "March" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "04" ? "April" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "05" ? "May" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "06" ? "June" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "07" ? "July" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "08" ? "August" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "09" ? "September" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "10" ? "October" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "11" ? "November" :  SUBSTRING((DT\_WSTR,8)@[User::BeginDate],5,2) == "12" ? "December" :  "Unknown") + ", " + SUBSTRING((DT\_WSTR,8)@[User::BeginDate],1,4) |
| ReportsDir | String | \\F3420-MWBP11\Reports\eCL\_Reports\ |  |
| SupervisorPull | String | Exec [EC].[sp\_rptCoachingSummaryForModule]2,0,0 | "Exec [EC].[sp\_rptCoachingSummaryForModule]2," +(DT\_WSTR,20) @[User::BeginDate] + "," + (DT\_WSTR,20) @[User::EndDate] |
| ToEmail | String | [Susmitha.palacherla@gdit.com](mailto:Susmitha.palacherla@gdit.com)  \*set from config file |  |
| TrainingPull | String | Exec [EC].[sp\_rptCoachingSummaryForModule]5,0,0 | "Exec [EC].[sp\_rptCoachingSummaryForModule]5," +(DT\_WSTR,20) @[User::BeginDate] + "," + (DT\_WSTR,20) @[User::EndDate] |
| varFileName | String |  |  |
| varFilePath | String |  | @[User::EncryptOutDir] + @[User::varFileName] |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

#### Connection Manager Entries

##### dbconn

* Dev – UVAADADSQL50CCO – eCoachingdev
* Test - UVAADADSQL52CCO– eCoachingtest
* Prod - UVAPADSQL50CCO – eCoaching

##### CSR\_Report

* eCL\_Coaching\_Summary\_CSR\_YYYYMMDD\_YYYYMMDD.csv
* Expression: @[User::EncryptInDir] + "eCL\_CoachingSummary\_CSR\_" + (DT\_WSTR,20) @[User::BeginDate] + "\_" + (DT\_WSTR,20) @[User::EndDate] + ".csv"

##### Supervisor\_Report

* eCL\_Coaching\_Summary\_Supervisor\_YYYYMMDD\_YYYYMMDD.csv
* Expression: @[User::EncryptInDir] + "eCL\_CoachingSummary\_Supervisor\_" + (DT\_WSTR,20) @[User::BeginDate] + "\_" + (DT\_WSTR,20) @[User::EndDate] + ".csv"

##### Quality\_Report

* eCL\_Coaching\_Summary\_Quality \_YYYYMMDD\_YYYYMMDD.csv
* Expression: @[User::EncryptInDir] + "eCL\_CoachingSummary\_Quality \_" + (DT\_WSTR,20) @[User::BeginDate] + "\_" + (DT\_WSTR,20) @[User::EndDate] + ".csv"

##### LSA\_Report

* eCL\_Coaching\_Summary\_LSA \_YYYYMMDD\_YYYYMMDD.csv
* Expression: @[User::EncryptInDir] + "eCL\_CoachingSummary\_LSA \_" + (DT\_WSTR,20) @[User::BeginDate] + "\_" + (DT\_WSTR,20) @[User::EndDate] + ".csv"

##### Training\_Report

* eCL\_Coaching\_Summary\_Training \_YYYYMMDD\_YYYYMMDD.csv
* Expression: @[User::EncryptInDir] + "eCL\_CoachingSummary\_Training \_" + (DT\_WSTR,20) @[User::BeginDate] + "\_" + (DT\_WSTR,20) @[User::EndDate] + ".csv"

##### CSR\_QNReport

* eCL\_Coaching\_Summary\_QN\_CSR\_YYYYMMDD\_YYYYMMDD.csv
* Expression: @[User::EncryptInDir] + "eCL\_CoachingSummary\_CSR\_QN\_" + (DT\_WSTR,20) @[User::BeginDate] + "\_" + (DT\_WSTR,20) @[User::EndDate] + ".csv"

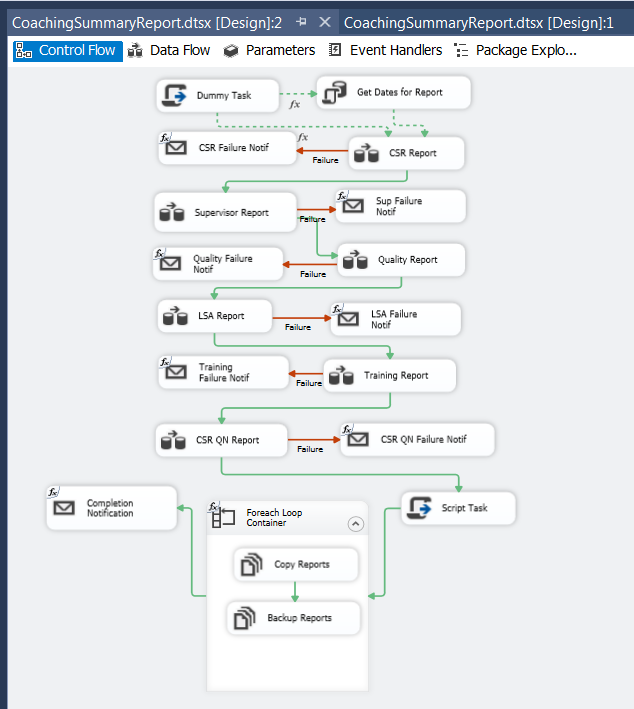
##### fileconn

* Expression: @[User::varFilePath]

##### smtpconn

ironport.maximus.com

#### Package Content



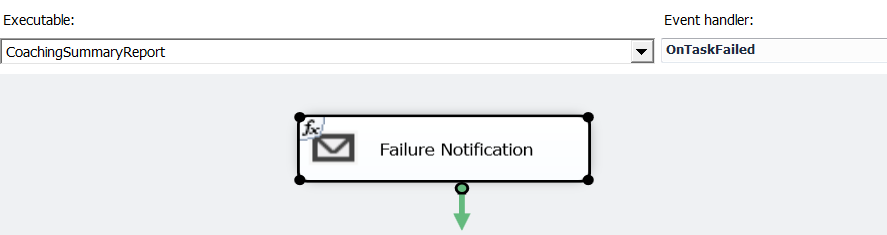
**Workflow of Steps**

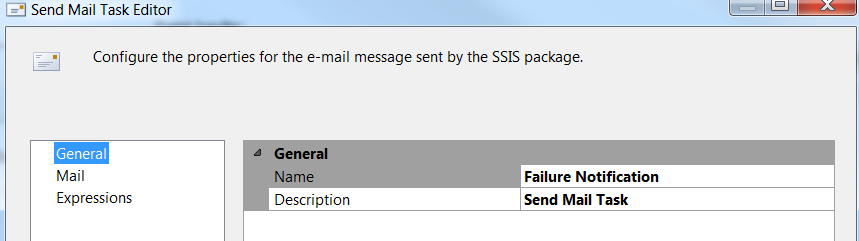
|  |  |  |  |
| --- | --- | --- | --- |
| **Step #** | **Task** | **On Success** | **On Failure** |
| 1. | **Dummy Task to establish precedence constraint** |  |  |
|  | Expression and Constraint (Logical OR)  Expression: @[User::Adhoc] == False | Go to Step 2 | Stop execution. |
|  |  |  |  |
|  | Expression and Constraint (Logical OR)  Expression: @[User::Adhoc] == True | Go to Step 3 | Stop execution. |
|  |  |  |  |
|  |  |  |  |
| 2. | **Get dates for Report** | Go to next step | Stop execution. |
|  |  |  |  |
| 3. | **CSR Report** | Go to step 4 | Go to Step 3a |
|  |  |  |  |
| 3a. | **CSR Failure Notification** | Stop execution. | Stop execution. |
|  |  |  |  |
| 4. | **Supervisor Report** | Go to step 5 | Go to Step 4a |
|  |  |  |  |
| 4a. | **Supervisor Failure Notification** | Stop execution. | Stop execution. |
|  |  |  |  |
| 5. | **Quality Report** | Go to step 6 | Go to Step 5a |
|  |  |  |  |
| 5a. | **Quality Failure Notification** | Stop execution. | Stop execution. |
|  |  |  |  |
| 6. | **LSA Report** | Go to step 7 | Go to Step 6a |
|  |  |  |  |
| 6a. | **LSA Failure Notification** | Stop execution. | Stop execution. |
|  |  |  |  |
| 7. | **Training Report** | Go to step 8 | Go to Step 7a |
|  |  |  |  |
| 7a. | **Training Failure Notification** | Stop execution. | Stop execution. |
|  |  |  |  |
| 8. | **CSR QN Report** | Go to step 9 | Go to Step 8a |
|  |  |  |  |
| 8a. | **CSR QN Failure Notification** | Stop execution. | Stop execution. |
|  |  |  |  |
| 9. | **Delay** | Go to step 10 | Stop execution. |
|  |  |  |  |
| 10. | **Foreach Loop Container**   * Copy Reports to Reports folder * Backup encrypted reports | Go to step 11 | Stop execution. |
|  |  |  |  |
| 11. | **Completion Notification** | End of process. | Stop execution. |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

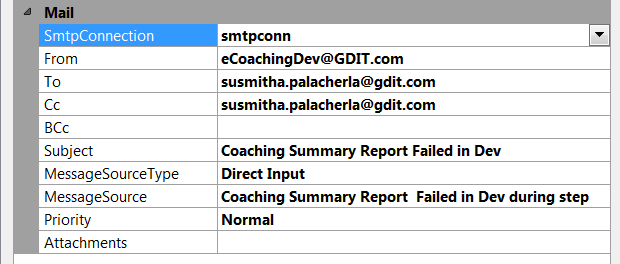
**Details**

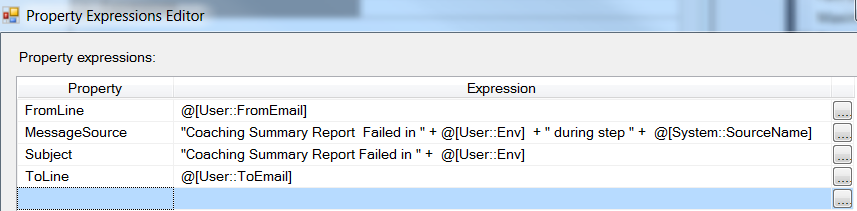
|  |  |
| --- | --- |
|  | **Task** |
|  | **Script Task: Dummy Task**  Does Nothing |
|  |  |
|  | **SQL Task: Get Dates for Report**  **Tab1: General**  **Result Set:** Single Row  **Connection type:** OLE DB  **Connection:** dbconn  **SQLSourceType:** Direct input  **SQLStatement:**  **--Begin**  DECLARE @intBeginDate int,  @intEndDate int  Exec [EC].[sp\_Get\_Dates\_For\_Previous\_Month]  @intBeginDate OUTPUT,  @intEndDate OUTPUT  SELECT @intBeginDate as N'@intBeginDate',  @intEndDate as N'@intEndDate'  **--End**  **Tab2: Parameter Mapping: Nothing**  **Tab3: Result Set**  0-User::BeginDate  1-User::EndDate  **Tab4: Expressions: Nothing** |
|  |  |
| **3.** | **DFT: CSR Report**     1. **OLE DB Source**        1. **Data Conversion**      1. **Derived Column**      1. **File Destination**   Connection Manager    Mappings |
|  |  |
| **3a.** | **Send Mail Task** |
|  |  |
| **\*** | **4, 4a, 5, 5a, 6, 6a, 7. 7a, 8, 8a similar to 3, 3a for respective Modules (Supervisor, Quality, LSA, Training and CSR QN Report)**  **\*Exception for step 8, CSR QN Report Data Conversion** |
|  |  |
| **9.** | **Script Task: Delay**  **(To allow time for all Reports to complete and not copy over incomplete Reports)**    public void Main()  {  // TODO: Add your code here  // Sleep for 90 seconds (\*1000)  System.Threading.Thread.Sleep(90000);  Dts.TaskResult = (int)ScriptResults.Success;  } |
|  |  |
| **10.** | **Foreach Loop**     1. **Copy Reports**      1. **Backup Reports** |
|  |  |
| **11.** | **Send Mail Task: Completion Notification** |
|  |  |

#### Event Handlers









#### Config File- Prod

|  |
| --- |
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#### Code Files

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| Procedures | \Code\DB\Stored Procedures\sp\_Get\_Dates\_For\_Previous\_Month.sql  \Code\DB\Stored Procedures\sp\_rptCoachingSummaryForModule.sql  \Code\DB\Stored Procedures\sp\_rptQNCoachingSummaryForModule |
| SSIS Package | \Code\ETL\CoachingSummaryReport.dtsx |
| Config Files | \Code\ETL\Dev\_CoachingSummaryReport.dtsConfig  \Code\ETL\Test\_CoachingSummaryReport.dtsConfig  \Code\ETL\Prod\_CoachingSummaryReport.dtsConfig |

#### Report Elements

##### Non -Quality Now

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| --- | --- | --- |
| **Number** | **Field** | **Description** |
| 1 | Employee Level ID | Module the log was submitted in |
| 2 | Employee Level Name | Name of the module |
| 3 | Coaching ID | ID of the coaching log |
| 4 | Form name | Coaching log form name |
| 5 | Status | Current status of the coaching log |
| 6 | Employee ID | Employee ID of the log recipient |
| 7 | Employee name | The last, first mi name of employee |
| 8 | City | Site of the employee |
| 9 | Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the log is submitted |
| 10 | Supervisor name | The last, first mi name of supervisor of employee |
| 11 | Manager employee ID | Employee ID of the manager of the log recipient at time log is submitted |
| 12 | Manager name | The last, first mi name of manager of employee |
| 13 | Current Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the report is run |
| 14 | Current Supervisor name | The last, first mi name of supervisor of employee |
| 15 | Current Manager employee ID | Employee ID of the manager of the log recipient at time the report is |
| 16 | Current Manager name | The last, first mi name of manager of employee |
| 17 | Review Supervisor employee ID | Employee ID of the supervisor who reviewed/coached the log recipient |
| 18 | Review Supervisor name | The last, first mi name of supervisor of employee |
| 19 | Review Manager employee ID | Employee ID of the manager who reviewed the log |
| 20 | Review Manager name | The last, first mi name of manager of employee |
| 21 | Description | Description or behavior subject to coaching |
| 22 | Coaching notes | Coaching notes for log |
| 23 | Event date | Date of event associated with log |
| 24 | Coaching date | Date of coaching associated with log |
| 25 | Submitted date | Date the log was submitted |
| 26 | Coaching source | Source of coaching (Direct, Indirect) |
| 27 | Sub-coaching source | How the coaching was identified |
| 28 | Coaching reason | Coaching reason of log |
| 29 | Coaching sub-reason | Coaching sub-reason of log |
| 30 | Value | Value of log (Opportunity, Reinforcement,…) |
| 31 | Submitter ID | Employee ID of the submitter of the log |
| 32 | Submitter name | Name of the submitter of the log |
| 33 | Supervisor reviewed date | Date/time supervisor reviewed and acknowledged the coaching log |
| 34 | Manager reviewed manual date | Date/time manager entered when reviewed and acknowledged the coaching log |
| 35 | Manager reviewed auto date | Date/time manager reviewed and acknowledged the coaching log |
| 36 | Manager notes | Comments or notes entered by manager |
| 37 | Employee reviewed date | Date when the recipient reviewed and acknowledged or entered comments. |
| 38 | Employee comments | Comments entered by employee |
| 39 | Program | Program associated with the log (Medicare, Marketplace, Dual, NA) |
| 40 | Behavior | Behavior associated with the log in the Training module (Production, Training, Other) |
| 41 | Report Code | Report code of log related to input data feed |
| 42 | Verint ID | ID of the Verint call record scorecard associated with the coaching log |
| 43 | Verint Form name | Form name in Verint related to coaching log |
| 44 | Coaching Monitor | Whether the log from Verint is a coaching monitor (Yes, No) |
| 45 | Follow-up Required | Whether the log requires a follow-up or not |
| 46 | Follow-up Date | Follow-up date entered at submission |
| 47 | Follow-up Coaching Date | Date of follow-up coaching session |
| 48 | Follow-up Coaching Notes | Notes entered during follow-up coaching session |
| 49 | Supervisor Follow-up Auto Date | System date and time when follow-up occurred |
| 50 | CSR Follow-up Auto Date | Date when the recipient reviewed and acknowledged or entered comments from follow-up. |
| 51 | CSR Follow-up Comments | Comments entered by employee from follow-up |
| 52 | Report Date | Date and time the report was run in CCYY-MM-DD HH:MI:SS.decimal. Note, this is for scheduled reports only. |

##### Quality Now

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| **Number** | **Field** | **Description** |
| 1 | Employee Level ID | Module the log was submitted in |
| 2 | Employee Level Name | Name of the module |
| 3 | Coaching ID | ID of the coaching log |
| 4 | Form name | Coaching log form name |
| 5 | Quality Now Batch ID | ID of the Quality Now Batch |
| 6 | Quality Now Batch Status | Status of the Quality Now Batch |
| 7 | Status | Current status of the coaching log |
| 8 | Employee ID | Employee ID of the log recipient |
| 9 | Employee name | The last, first mi name of employee |
| 10 | City | Site of the employee |
| 11 | Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the log is submitted |
| 12 | Supervisor name | The last, first mi name of supervisor of employee |
| 13 | Manager employee ID | Employee ID of the manager of the log recipient at time log is submitted |
| 14 | Manager name | The last, first mi name of manager of employee |
| 15 | Current Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the report is run |
| 16 | Current Supervisor name | The last, first mi name of supervisor of employee |
| 17 | Current Manager employee ID | Employee ID of the manager of the log recipient at time the report is |
| 18 | Current Manager name | The last, first mi name of manager of employee |
| 19 | Review Supervisor employee ID | Employee ID of the supervisor who reviewed/coached the log recipient |
| 20 | Review Supervisor name | The last, first mi name of supervisor of employee |
| 21 | Review Manager employee ID | Employee ID of the manager who reviewed the log |
| 22 | Review Manager name | The last, first mi name of manager of employee |
| 23 | Description | Description from the log (Summary of Caller’s Issues) |
| 24 | Coaching notes | Coaching notes for log |
| 25 | Event date | Date of event associated with log |
| 26 | Coaching date | Date of coaching associated with log |
| 27 | Submitted date | Date the log was submitted |
| 28 | Coaching source | Source of coaching (Direct, Indirect) |
| 29 | Sub-coaching source | How the coaching was identified |
| 30 | Coaching reason | Coaching reason of log |
| 31 | Sub-coaching reason | Sub-coaching reason of log |
| 32 | Value | Value of the log (shall be NA) |
| 33 | Submitter ID | Employee ID of the submitter of the log |
| 34 | Submitter name | Name of the submitter of the log |
| 35 | Supervisor reviewed date | Date/time supervisor reviewed and acknowledged the coaching log |
| 36 | Manager reviewed manual date | Date/time manager entered when reviewed and acknowledged the coaching log |
| 37 | Manager reviewed auto date | Date/time manager reviewed and acknowledged the coaching log |
| 38 | Manager notes | Comments or notes entered by manager |
| 39 | Employee reviewed date | Date when the recipient reviewed and acknowledged or entered comments. |
| 40 | Employee comments | Comments entered by employee |
| 41 | Program | Program associated with log |
| 42 | Verint ID | ID of the Verint call record scorecard associated with the coaching log |
| 43 | Verint Form name | Form name in Verint related to coaching log |
| 44 | Coaching Monitor | Whether evaluation is a coaching monitor or not |
| 45 | Evaluation Status | The status of the individual record within a Quality Now batch |
| 46 | Business Process | Rating for business process |
| 47 | Business Process Reason | Selected reason for business process |
| 48 | Business Process Comment | Entered comments for business process |
| 49 | Info Accuracy | Rating for information accuracy |
| 50 | Info Accuracy Reason | Selected reason for information accuracy |
| 51 | Info Accuracy Comment | Entered comments for information accuracy |
| 52 | Privacy Disclaimers | Rating for privacy disclaimer |
| 53 | Privacy Disclaimers Reason | Selected reason for privacy disclaimer |
| 54 | Privacy Disclaimers Comment | Entered comments for privacy disclaimer |
| If channel is not Written Correspondence | | |
| 55 | Issue Resolution | Rating for issue resolution |
| 56 | Issue Resolution Comment | Entered comments for issue resolution |
| If channel is Written Correspondence | | |
| 55 | Business Correspondence | Rating for business correspondence |
| 56 | Business Correspondence Comment | Entered comments for business correspondence |
| If channel is not Web Chat and not Written Correspondence | | |
| 57 | Call Efficiency | Rating for call efficiency |
| 58 | Call Efficiency Comment | Entered comments for call efficiency |
| If channel is Web Chat | | |
| 57 | Chat Efficiency | Rating for call efficiency |
| 58 | Chat Efficiency Comment | Entered comments for call efficiency |
| If channel is not Web Chat and not Written Correspondence | | |
| 59 | Active Listening | Rating for active listening |
| 60 | Active Listening Comment | Entered comments for active listening |
| If channel is Web Chat | | |
| 59 | Issue Diagnosis | Rating for active listening |
| 60 | Issue Diagnosis Comment | Entered comments for active listening |
| If channel is not Web Chat and not Written Correspondence | | |
| 61 | Personality Flexing | Rating for personality flexing |
| 62 | Personality Flexing Comment | Entered comments for personality flexing |
| If channel is Web Chat | | |
| 61 | Professional Communication | Rating for personality flexing |
| 62 | Professional Communication Comment | Entered comments for personality flexing |
| If channel is not Written Correspondence | | |
| 63 | Customer Temp Start | Value for start temperature of caller |
| 64 | Customer Temp Start Comment | Entered comments for start temperature |
| 65 | Customer Temp End | Value for end temperature of caller |
| 66 | Customer Temp End Comment | Entered comments for end temperature |