**eCoaching Log System**

**Unit Test Document - Outliers Load process**

Change History Log

| Date | Revision | Change Description | Author |
| --- | --- | --- | --- |
| 07/22/2014 | 1.0 | SCR – 13213 Map Coaching Reason ID To 9 for Outlier records from feed | Susmitha Palacherla |
| 12/18/2014 | 2.0 | SCR – 14028 Add new Report Type TR2 | Susmitha Palacherla |
| 09/22/2015 | 3.0 | TFS 644 – ARC Escalation and Transfer feeds | Susmitha Palacherla |
| 2/16/2016 | 4.0 | TFS 1877 - OMR Low CSAT logs should be viewable by hierarchy manger | Susmitha Palacherla |
| 2/17/2016 | 5.0 | TFS 1914 - OMR Short Calls feed with Manager Review | Susmitha Palacherla |
| 4/11/2017 | 6.0 | TFS 6145 – Breaks feeds with direct coach (Sup review) | Susmitha Palacherla |
| 11/17/2017 | 7.0 | TFS 8793 - Break feed (BRL/BRN) coaching logs for all non-exempt CCO employees | Susmitha Palacherla |
| 3/22/2018 | 8.0 | TFS –7854 Data File Encryption. | Susmitha Palacherla |
| 4/4/2018 | 9.0 | TFS 10524 Move apps away from E Drive and TFS 10532 drop Outliers Fact table | Susmitha Palacherla |
| 7/30/2018 | 10.0 | TFS 11451 - New feed file for CSRs who took inappropriate action | Susmitha Palacherla |
| 5/14/2019 | 11.0 | TFS 14401 – Separate MSR file and source for London | Susmitha Palacherla |
| 7/5/2019 | 12.0 | TFS 14108 - New process for short calls. | Susmitha Palacherla |
| 8/3/2020 | 13.0 | TFS 17716 - Removed company specific references | Susmitha Palacherla |
| 9/16/2020 | 14.0 | TFS 18154 – Incentive Discrepancy feed changes and document rewrite | Susmitha Palacherla |
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## SSIS – Outlier\_Coaching

#### Project Name: CCO eCoaching

#### Unit Identifier: Outlier\_Coaching.dtsx

#### Test Case identifier: OC

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | New Incentive Discrepancy Data Feed |
| Test Environment | eCoaching\_Dev database on f3420-ecldbd01 |
| Code Modules created/updated | Several new and existing (See runbook) |
| Code doc | Several new and existing (See runbook) |
| Notes and sql |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Test Case ID** | **Action** | **Expected Result** | **Tested** | **Pass/Fail** |
| OC-1.1 | Run Load SQL Agent Job CoachingOutliersLoad | Job should complete successfully | Y | Pass |
| OC-1.2 | Check Backup Folder  $\Coaching\Outliers\Backups\ | Loaded files should be backed up | Y | Pass |
| OC-1.3 | Check Decrypt Out Folder  $\ \Coaching\Outliers\Decrypt\_Out\ | No decrypted files in folder | Y | Pass |
| OC-1.4 | Check Encrypt out Folder  $ \Coaching\Outliers\Encrypt\_Out\ | No files should remain if successfully loaded.  Should remain if load failed. | Y | Pass |
|  |  |  |  |  |
| OC-2.1 | Run Notifications SQL Agent Job  CoachingNotifications | Job should complete successfully | Y | Pass |
| OC-2.2 | Verify Email Sent on Coaching log | Email Sent flag for affected logs should be set to 1 | Y | Pass |
| OC-2.3 | Verify Notification Date on Coaching Log | NotificationDate should be set to job run time | Y | Pass |
|  |  |  |  |  |
| OC-3.1 | Query File List Table | Should record Filename, LoadDatetime and Counts | Y | Pass |
| OC-4.1 | Query Rejected Table | If FileList table shows rejected logs, should be present with Reject Reason | Y | Pass |
| OC-5.1 | Query Staging Table | Should be truncated | Y | Pass |
| OC-6.1 | Query Coaching Log Table | Should return the number of Coaching logs recorded in File List table | Y | Pass |
| OC-6.2 | Verify Report Code | Report Code as listed in reference table at end of doc | Y | Pass |
| OC-6.3 | Verify Form Name | eCL-M-EmpID -CoachingID | Y | Pass |
| OC-6.4 | Verify Source | Source as listed in reference table at end of doc | Y | Pass |
| OC-6.5 | Verify Status | Status as listed in reference table at end of doc | Y | Pass |
| OC-6.6 | Verify Site | Employee Site from Hierarchy table | Y | Pass |
| OC-6.7 | Verify Module | Module as listed in reference table at end of doc  plus  Based on Employee Job code  ('WACS01', 'WACS02', 'WACS03') - 1  ('WACS40') - 2  ('WACQ02','WACQ03','WACQ12', 'WACQ13') - 3  ('WIHD01','WIHD02','WIHD03','WIHD04', 'WABA11', 'WISA03','WIHD40', 'WPPT40') - 4  ('WTTR02','WTTI02','WTTR12','WTTR13','WTID13', 'WTTR40', 'WTTR50') - 5  ('WABA01','WABA02','WABA03') - 6  ('WPSM11') - 7  ('WMPL02','WMPL03') - 8  ('WPPM11') - 9 | Y | Pass |
| OC-6.8 | Verify Program | Employee Program from Hierarchy table | Y | Pass |
| OC-6.9 | Verify Description | Format per FS | Y | Pass |
|  |  |  |  |  |
| OC-7.1 | Query Coaching Log Reason Table | Populated correctly for corresponding Coaching logs inserted | Y | Pass |
| OC-7.2 | Verify Coaching Reason | Coaching Reason as listed in reference table at end of doc | Y | Pass |
| OC-7.3 | Verify Sub Coaching Reason | Subcoaching Reason as listed in reference table at end of doc | Y | Pass |
| OC-7.4 | Verify Value | Value as listed in reference table at end of doc | Y | Pass |
|  |  |  |  |  |
| OC-8.1 | Review Log | Log details displayed correctly. | Y | Pass |
|  |  |  |  |  |
| OC-9.1 | Review workflow | Per FS  Each log has different workflow  For IDD Files –  Pending employee review🡪 completed  \* 180265 | Y | Pass |
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| **Unit Test Result:** | | | | **Pass** |

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| --- | --- | --- |
| Susmitha Palacherla |  | 07/22/2014 |
| Initial Tester |  | Initial Date Completed |
| Susmitha Palacherla |  | 09/18/2020 |
| Last Tester |  | Last Tested On |

## References

**Report Codes**

|  |  |
| --- | --- |
| **OMR Report Code** | **Report** |
| ACO | OMR: Inappropriate ACO Escalation |
| ACW | OMR: ACW |
| AHT | OMR: AHT |
| CAN | OMR: Cancelled Calls |
| DFQ | OMR: Default Qualifiers |
| IDE | OMR: Inappropriate DME Escalation |
| IEE | OMR: Inappropriate EE/MM Escalation |
| INF | OMR: Inappropriate NGD Feedback |
| ISG | OMR: ISG Consults |
| ISQ | OMR: Short Calls Inbound |
| MSR | Monthly Scorecard Review |
| NIT | OMR: NGD Inappropriate Transfer |
| OPN | OMR: Open Calls |
| OSC | OMR: Short Calls Outbound |
| PBH | OMR: Potential Hardship |
| RME | OMR: Returned MAC Escalation |
| SLG | OMR: Scripts Logged |
| TR2 | OMR: FFM T2 Transfers |
| TRN | OMR: Transfers |

**Source**

The source of the coaching log shall be **OMR** except where described below:

|  |  |
| --- | --- |
| **Report Code** | **Source** |
| MSR | Performance Scorecard (London: Internal CCO Reporting) |
| MSRS | Performance Scorecard |
| IDD | Internal PRM-O (Incentives Team) |

**Status**

|  |  |  |
| --- | --- | --- |
| **OMR Report Code** | **Employee Level** | **Status** |
| ACO, ACW, AHT, CAN, DFQ, IDE, IEE, INF, ISG, LCS, NIT, OPN, OSC, RME, SLG, SPI, TR2, TRN | CSR | Pending Manager Review |
| BRL, BRN, IAE, IAEF, IAT, ISQ, PBH | CSR | Pending Supervisor Review |
| MSR,QNB | CSR | Pending Acknowledgement |
| BRL, BRN | Supervisor | Pending Manger Review |
| MSRS, QNB | Supervisor | Pending Acknowledgement |
| BRL, BRN | Quality | Pending Quality Lead Review |
| BRL, BRN | LSA, Training, Analytics, Optimization, Project Admin, Quality Insight, Quality Systems, SWP, TCA, TCA Analyst | Pending Supervisor Review |
| IDD | Supervisor, LSA, Training, Quality | Pending Employee Review |

**Module**

The eCoaching Logs for OMR will be initiated in the Employee/CSR module except as described below:

|  |  |  |
| --- | --- | --- |
| **Report Code** | **Employee Level** | **Condition** |
| BRL/BRN | CSR | When employee job code is WACS01, WACS02 or WACS03 |
| Quality | Quality Module when employee job code is WACQ02, WACQ03 or WACQ12. |
| Supervisor | When employee job code is WACS40 |
| LSA | When employee job code is WIHD01, WIHD02, WIHD03, WIHD04, WABA11, WISA03 |
| Training | When employee job code is WTTR02, WTTI02, WTTR12, WTTR13, WTID13 |
| Administration | When employee job code is WABA01, WABA02, WABA03 |
| Analytics Reporting | When employee job code is WPSM11 |
| Production Planning | When employee job code is WMPL02, WMPL03 |
| Program Analyst | When employee job code is WPPM11 |
| IDD | Supervisor | When employee job code is WACS40 |
| Quality | When employee job code is WACQ13 |
| LSA | When employee job code is WIHD40, WPPT40 |
| Training | When employee job code is WTTR40, WTTR50 |
| MSRS | Supervisor | When employee job code is WACS40 |

**Coaching Reasons, SubCoaching Reasons and Values**

|  |  |  |  |
| --- | --- | --- | --- |
| **OMR Report Code** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| ACO | OMR/Exceptions | Research Required | OMR: Inappropriate ACO Escalation |
| ACW | OMR/Exceptions | Research Required | OMR: ACW |
| AHT | OMR/Exceptions | Research Required | OMR: AHT |
| BRL | Breaks | Research Required | Exceed Break Length |
| BRN | Breaks | Research Required | Exceed Number of Breaks |
| CAN | OMR/Exceptions | Research Required | OMR: Cancelled Calls |
| DFQ | OMR/Exceptions | Research Required | OMR: Default Qualifiers |
| IAE | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Escalation |
| IAEF | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Escalation FFM |
| IAT | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Transfers |
| IDD | OMR/Exceptions | Reinforcement | OMR: Incentives Data Discrepancy |
| IDE | OMR/Exceptions | Research Required | OMR: Inappropriate DME Escalation |
| IEE | OMR/Exceptions | Research Required | OMR: Inappropriate EE/MM Escalation |
| INF | OMR/Exceptions | Research Required | OMR: Inappropriate NGD Feedback |
| ISG | OMR/Exceptions | Research Required | OMR: ISG Consults |
| ISQ | OMR/Exceptions | Opportunity | OMR: Short Calls Inbound |
| LCS | OMR/Exceptions | Research Required | OMR: Low CSAT |
| MSR | Current Coaching Initiatives | Reinforcement | Other: Specify reason under coaching details. |
| MSRS | Current Coaching Initiatives | Reinforcement | Other: Specify reason under coaching details. |
| NIT | OMR/Exceptions | Research Required | OMR: NGD Inappropriate Transfer |
| OPN | OMR/Exceptions | Research Required | OMR: Open Calls |
| OSC | OMR/Exceptions | Research Required | OMR: Short Calls Outbound |
| PBH | OMR/Exceptions | Opportunity | OMR: Potential Hardship |
| RME | OMR/Exceptions | Research Required | OMR: Returned MAC Escalation |
| SLG | OMR/Exceptions | Research Required | OMR: Scripts Logged |
| TR2 | OMR/Exceptions | Research Required | OMR: FFM T2 Transfers |
| TRN | OMR/Exceptions | Research Required | OMR: Transfers |

**Workflow**

|  |  |  |  |
| --- | --- | --- | --- |
| Report Code | Initial Status | Next Status | Next Status |
| IDD | Pending Emp Review | Completed | NA |
|  |  |  |  |

SQL

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| --- |
| OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert];  SELECT [Emp\_ID]  ,Emp\_Job\_Code  ,ps\_emp\_id\_prefix  ,Legacy\_Emp\_ID  ,Emp\_Site  ,Active  ,Start\_date  ,End\_Date  ,Hire\_Date  ,CONVERT(nvarchar(70),DecryptByKey(Emp\_Name)) AS [Emp\_Name]  ,CONVERT(nvarchar(50),DecryptByKey(Emp\_Email)) AS [Emp\_Email]  ,CONVERT(nvarchar(30),DecryptByKey(Emp\_LanID)) AS [Emp\_LanID]  ,emp\_job\_code  , [Sup\_ID]  ,CONVERT(nvarchar(70),DecryptByKey(Sup\_Name)) AS [Sup\_Name]  ,CONVERT(nvarchar(70),DecryptByKey(Sup\_Lanid)) AS [Sup\_LanID]  ,CONVERT(nvarchar(50),DecryptByKey(Sup\_Email)) AS [Sup\_Email]  ,CONVERT(nvarchar(70),DecryptByKey(Mgr\_Name)) AS [Mgr\_Name]  ,[Mgr\_ID]  ,CONVERT(nvarchar(50),DecryptByKey(Mgr\_Email)) AS [Mgr\_Email]  ,[SrMgrLvl1\_ID]  ,[SrMgrLvl2\_ID]  ,[SrMgrLvl3\_ID]  FROM [EC].[Employee\_Hierarchy]  --WHERE CONVERT(nvarchar(70),DecryptByKey(Emp\_Name)) like '%Julia%'  --where emp\_id = '236712'  where (sup\_id = '236712' or mgr\_id = '236712' or SrMgrLvl1\_ID = '236712' or SrMgrLvl2\_ID = '236712')  and active = 'A'  SELECT [EC].[fn\_strGetUserRole] ('345712')  GO  SELECT \* FROM [EC].[Outlier\_FileList]  WHERE DATEADD(day, DATEDIFF(day, 0, [File\_LoadDate]), 0) > DATEADD(day, DATEDIFF(day, 0, GETDATE()),-2)  ORDER BY [FILE\_NAME]  SELECT \* FROM [EC].[Coaching\_Log]with (nolock)  WHERE strreportcode like 'IDD%2020091%'  ORDER BY coachingid  update ec.Coaching\_Log  set empid = '236464'  where coachingid = 180265  SELECT CLR.\* FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  WHERE strreportcode like 'IDD%2020091%'  ORDER BY coachingid  EXEC [EC].[sp\_SelectCoaching4Contact]  EXEC [EC].[sp\_SelectReviewFrom\_Coaching\_Log] @intLogId = 168663  --select emp\_id, sup\_id, Mgr\_ID from ec.Employee\_Hierarchy where emp\_id = '231927'  --emp\_id sup\_id Mgr\_ID  --231927 228058 236292  /\*  UPDATE ec.Employee\_Hierarchy  SET emp\_job\_code = 'wacs01'  WHERE emp\_id = '236464'  UPDATE ec.Employee\_Hierarchy  SET sup\_id = '236464'  WHERE emp\_id = '231927'  UPDATE ec.Employee\_Hierarchy  SET mgr\_id = '236464'  WHERE emp\_id = '231927'  UPDATE ec.Employee\_Hierarchy  SET sup\_id = '228058'  WHERE emp\_id = '231927'  UPDATE ec.Employee\_Hierarchy  SET mgr\_id = '236292'  WHERE emp\_id = '231927'  \*/ |