**CCO eCoaching DB Unit Test Document**

* **Outliers Load process**

July 8, 2019

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 |

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## SCR 13213 Map Coaching Reason ID To 9 for Outlier records loaded from feed

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | The Outliers logs used to be categorized with Coaching Reason ‘Current Coaching Initiatives’ which is Coaching Reason ID 5.  Program has requested to map them to Coaching Reason 'OMR / Exceptions' in the new redesigned system, which is Coaching Reason ID 9. |
| Test Environment | eCoaching\_Dev database on vrivfssdbt02\scord01,1437 |
| Code Modules created/updated | Procedure - [EC].[sp\_InsertInto\_Coaching\_Log\_Outlier]  Procedure - [EC].[sp\_Update5Review\_Coaching\_Log] |
| Code doc | CCO\_eCoaching\_Outliers\_Load\_Create.sql  CCO\_eCoaching\_Log\_Create.sql |
| Notes | Loaded Outlier Fileand verified that the Loaded records were inserted with Coaching Reason ID 9 in the Coaching\_Log\_reason table. |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 1. | Loaded file with File name eCl\_Outlier\_Feed\_OSC20140712.csv | 3 records loaded in Coaching\_log table and 3 records in coaching\_log\_Reason child table.  select \* FROM [eCoachingDev].[EC].[Coaching\_Log]  where [strReportCode]= 'OSC20140712'  --3 records  SELECT \*  FROM [eCoachingDev].[EC].[Coaching\_Log\_Reason]  where CoachingReasonID = 9  and coachingid > 10542  GO  --3 records with coachingreasonid 9 | P | Max(coachingid) prior to file load 10542. |
| 2. | To update historical data loaded since the redesign there were no records in the table in dev, so updated submitteddate for records loaded on 5/23 to 6/23  update [eCoachingDev].[EC].[Coaching\_Log]  set submitteddate = '2014-06-23 00:00:00.000'  where [strReportCode]is not null  and submitteddate = '2014-05-23 00:00:00.000'  --100 records updated  These 100 records will have corresponding child records in coaching\_log\_reason table with coachingreasonid value of 5.  select clr.\*  from [EC].[Coaching\_Log]cl join [EC].[Coaching\_Log\_reason] clr  on cl.coachingid = clr.coachingid  where cl.sourceid = 212  and clr.CoachingReasonID = 5  and cl.submitteddate >= '2014-06-12 00:00:00.000'  Run update to update the historical outliers data loaded on or after 6/12 to coachingreasonid 9. | --100 records updated  select clr.\*  from [EC].[Coaching\_Log]cl join [EC].[Coaching\_Log\_reason] clr  on cl.coachingid = clr.coachingid  where cl.sourceid = 212  and clr.CoachingReasonID = 9  and cl.submitteddate >= '2014-06-12 00:00:00.000'  --103 records  (3 from nelwly loaded file and 100 from updated historical data) | P |  |
|  | Update clr  set CoachingReasonID = 9  from [EC].[Coaching\_Log]cl join [EC].[Coaching\_Log\_reason] clr  on cl.coachingid = clr.coachingid  where cl.sourceid = 212 and CoachingReasonID = 5  and cl.submitteddate >= '2014-06-12 00:00:00.000'  --100 records updated |  |  |  |
| 3. | Manager Review of Outlier log from UI  Looked up the CoachingID for an outlier log that has the new Coaching reason id 9  select clr.\*  from [EC].[Coaching\_Log]cl join [EC].[Coaching\_Log\_reason] clr  on cl.coachingid = clr.coachingid  where cl.sourceid = 212  and clr.CoachingID =680588  and clr.coachingreasonid = 9  Upadted the Manager information for a csr to myself and Jourdain to sup.  update [eCoachingTest].[EC].[Employee\_Hierarchy]  set [Mgr\_ID]= '345712'  ,[Mgr\_LanID]='susmitha.palacherla'  where emp\_lanid = '228483'    413846, Brett.Bowen -- manager      update [eCoachingTest].[EC].[Employee\_Hierarchy]  set [Sup\_ID]= '92489'  ,[Sup\_LanID]='Jourdain.Augustin',  [Sup\_Email]='Jourdain.Augustin@GDIT.com'  where emp\_id = '228483' | Expecting to see custom Outlier Review page.  Be able to enter if Coaching is required and notes.  If No coaching is required, then log status needs to be set to Inactive  Reason – Other and value in Coaching log Reason be set to ‘Not Coachable’ | P |  |
|  | Updated the csrid on coaching log to '228483'  Launched Review page from  <https://vacmsmpmd01.vangent.local/coach2/default.aspx>  The Outliers logs for csrid 228483 appaered under my pending eCoaching Logs in the Manager dashboard.  Clicked on the url to open the log  Fill in the form.  Check database.  select clr.\*  from [EC].[Coaching\_Log]cl join [EC].[Coaching\_Log\_reason] clr  on cl.coachingid = clr.coachingid  where cl.sourceid = 212  and clr.CoachingID =680588  and clr.coachingreasonid = 9  SELECT \*  FROM [EC].[Coaching\_Log]  where sourceid = 212  and CoachingID = 680588 |  |  |  |

## SCR 14028 New report TR2 for FFM Incorrect Transfers

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | A new OMR Report will be loaded into eCL as requested by CMS. |
| Test Environment | eCoaching\_Dev database on vrivfssdbt02\scord01,1437 |
| Code Modules created/updated | Added record to [EC].[DIM\_Sub\_Coaching\_Reason] table  Added record to [EC].[Coaching\_Reason\_Selection] table  Added new mapping from report code TR2 to sub coaching reason ID in Function [EC].[fn\_intSubCoachReasonIDFromRptCode] |
| Code doc | CCO\_eCoaching\_Functions.sql |
| Notes | Loaded Outlier Files and verified that the Loaded records were inserted with Coaching Reason ID 9 and sub coaching reason id 109 in the Coaching\_Log\_reason table.  In the Coaching\_log table the logs are identified by str report code starting with ‘TR2’ |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 2.1 | Loaded file with File name eCl\_Outlier\_Feed\_TR220141216.csv | 2 records loaded in Coaching\_log table and 2records in coaching\_log\_Reason child table.  select \* FROM [eCoachingDev].[EC].[Coaching\_Log]  where [strReportCode]= ' TR220141220'  --2 records  SELECT \*  FROM [eCoachingDev].[EC].[Coaching\_Log\_Reason]  where CoachingReasonID = 9  and coachingid in (21909,  21910)  GO  --2 records with coachingreasonid 9  And subcoachingreasonid of 109. | P | Coaching ids  21909  21910 |

## TFS 644 New ARC feeds (IAE and IAT)

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | 2 new OMR Reports will be loaded into eCL as requested by CMS.(IAE and IAT) |
| Test Environment | eCoaching\_Dev database on vrivfssdbt02\scord01,1437 |
| Code Modules created/updated | Add new fields to OMR tables for CD1 and CD2  Added record to [EC].[DIM\_Sub\_Coaching\_Reason] table for IAT (have place holder for IAE)  Update IAE record in [EC].[Coaching\_Reason\_Selection] table to not display in UI  Added new mapping from report code IAT to sub coaching reason ID in Function [EC].[fn\_intSubCoachReasonIDFromRptCode]  Update Review, select for Contact , Update Review and Insert into Coaching from Outlier procedures.  Update Notification script with custom email body for OMRARC. |
| Code doc | CCO\_eCoaching\_Log\_Create.sql  CCO\_eCoaching\_Functions.sql  CCO\_eCoaching\_Outliers\_Load\_Create.sql  CCO\_eCoaching\_Maintenance\_Create.sql |
| Notes | Loaded Outlier Files and verified that the Loaded records were inserted with Coaching Reason ID 9 and sub coaching reason id 29 and 231 respectively in the Coaching\_Log\_reason table.  In the Coaching\_log table the logs are identified by str report code starting with IAE and IAT.  Load the files and check the following: |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 3.1 | Check for new subcoaching reason after insert | Row with id 231 | P |  |
| 3.2 | Check fn for translate of Reportcode to subcoachingreasonID | Return 231 | P |  |
| 3.3 | Check OMR tables for new fields. | CD1 and CD2 are present. | P |  |
| 3.4 | Check Description | CD1 and CD2 are concatenated to ID in file and static text.  CRLF enforced between values in UI. | P |  |
| 3.5 | Check strReportCode | IAT and IAE Respectively | P |  |
| 3.6 | Check SubCoachingReasonIDs in CLR tables | 29 and 231 respectively | P |  |
| 3.7 | Check if logs for inactive csrs are rejected | Should go to rejected table | P |  |
| 3.8 | Check that records are being identified for Notification | Should be returned by Select4contact with status pending sup review. | P |  |
| 3.9 | Test Notification | Email delivery | P |  |
| 3.10 | Test Notification | Standard email attributes for OMR | P |  |
| 3.11 | Test Notification | Custom body that is different than other  OMR feeds for supervisor pending Notification | P |  |
| 3.12 | Test Notification | EmailSent flag set to 1 after Email delivery | P |  |
| 3.13 | Verify SCRs available under CR 'OMR / Exceptions' | IAE should not display | P |  |
| 3.14 | Run load with multiple other OMR files including a mix of LCS, IAE, IAT and each of the other types of Outlier files. | Filenames should be parsed correctly and load process should execute containers for LCS, IAT/IAE and Other OMR files accordingly. | P |  |
| 3.15 | Review log as sup from UI and Update | Log appears with CRLF in Decsription.  After update and submit status updates to PER(4)  And Coachingnotes populated with Date and comments. | P |  |
| 3.16 | Review log as emp from UI | Available in CSR pending dashboard  Able to acknowledge and enter comments and submit  Should go to complete on submission  And CSr comments populated. | P |  |
|  |  |  |  |  |

## TFS 1877 - OMR Low CSAT logs should be viewable by hierarchy manger

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | LCS logs are currently not viewable by Hierarchy managers if they are not the review managers listed in the file. |
| Test Environment | eCoaching\_Dev database on vrivfssdbt02\scord01,1437 |
| Code Modules created/updated | In PROCEDURE [EC].[sp\_SelectReviewFrom\_Coaching\_Log] update the defintion for strCSRMgrID to pull directly from Hierarchy table instead of displaying the review Manager ID for LCS. |
| Code doc | CCO\_eCoaching\_Log\_Create.sql |
| Notes | Find an LCS Coaching log and assign myself as the Manger for the employee in Hierarchy table.  Select \* FROM [EC].[Coaching\_Log]  where strreportcode like 'lcs%'  and statusid = 5  update [EC].[Employee\_Hierarchy]  set [Mgr\_ID]= '345712'  ,[Mgr\_LanID]='susmitha.palacherla'  where emp\_id = '225411'   * manuel.soto |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 4.1 | Go to UI and try to open LCS log for employee updated above. | Log should open up for review. | P |  |
| 4.2 | Go to UI and try to open LCS log for another employee where I am not Hierarchy Manager but review Manager | Log should open up for review. | P |  |

## TFS 1914 - OMR Short Calls feed with Manager Review

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | There will be new text for the review page in place of existing omr text and sop link. To be able to display the custom link the isq calls need to be distinguishable from other omr ecls. |
| Test Environment | eCoaching\_Dev database on vrivfssdbt02\scord01,1437 |
| Code Modules created/updated | In PROCEDURE [EC].[sp\_SelectReviewFrom\_Coaching\_Log]  Add the definition for subcoaching reason id 23 to be flagged as "OMR / ISQ" |
| Code doc | CCO\_eCoaching\_Log\_Create.sql |
| Notes | Find an LCS Coaching log and assign myself as the Manger for the employee in Hierarchy table.  Load an isq file  select \* FROM [EC].[Coaching\_Log]  where strreportcode like 'isq%'  and statusid = 5 |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 5.1 | Pick a log returned above and plug intothe review sp.  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectReviewFrom\_Coaching\_Log]  @strFormIDin = N'eCL-christopher.kalkman-695386'  SELECT 'Return Value' = @return\_value  GO | Log should display with "OMR / ISQ"= 1 | P |  |

## TFS 6145 Breaks Feeds(BRN and BRL with direct coach)

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | 2 new feeds BRL and BRN with direct coach |
| Test Environment | eCoaching\_Dev database on vrivfssdbt02\scord01,1437 |
| Code Modules created/updated | Ssis package |
| Code doc | 1. added record in coaching reason table  2. added records in sub coaching reason table  3. updated fn for subcoachingreason id lookup [EC].[fn\_intSubCoachReasonIDFromRptCode]  4. updated insert sp [EC].[sp\_InsertInto\_Coaching\_Log\_Outlier]  5. updated review sp[EC].[sp\_SelectReviewFrom\_Coaching\_Log]  6. updated reviewupdate sp sp\_Update5Review\_Coaching\_Log.sql  7. updated ssis load package Outlier\_Coaching.dtsx |
| Notes | Loaded test files and reviewed attributes and wokflow and notifications  SELECT \*  FROM [EC].[Outlier\_Coaching\_Stage]  GO  SELECT \*  FROM [EC].[Coaching\_Log]  where strReportCode = 'BRl20170320'  GO  SELECT CLR.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  where strReportCode = 'BRl20170320'  GO  SELECT \*  FROM [EC].[Outlier\_Coaching\_Fact]  where [Report\_Code] = 'BRl20170320'  GO  SELECT \*  FROM [EC].[Outlier\_FileList]  order by [File\_LoadDate]  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectCoaching4Contact]  SELECT 'Return Value' = @return\_value  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_Select\_Email\_Attributes]  @strModulein = N'CSR',  @intSourceIDin = 212,  @bitisCSEin = 0  SELECT 'Return Value' = @return\_value  GO  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 1  where EmailSent = 0  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 0  where FormName = 'eCL-kristina.taylor-66793'  DECLARE @return\_value int  EXEC [EC].[sp\_SelectReviewFrom\_Coaching\_Log]  @strFormIDin = N'eCL-kristina.taylor-66793'  SELECT 'Return Value' = @return\_value  GO  --Test as log owner(sup)  SELECT \*  FROM [EC].[Employee\_Hierarchy]  where Emp\_ID = '217272'  GO  Update [EC].[Employee\_Hierarchy]  set Emp\_Job\_Code= 'wacs40'  where Emp\_ID = '345712'  --223640/Sharon.Spencer  update [EC].[Employee\_Hierarchy]  set Sup\_ID = '345712',  Sup\_LanID = 'susmitha.palacherla'  where Emp\_ID = '217272'    update [EC].[Employee\_Hierarchy]  set Sup\_ID = '223640',  Sup\_LanID = 'Sharon.Spencer'  where Emp\_ID = '217272'    DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectFrom\_Coaching\_Log\_SUPPending]  @strCSRSUPin = N'susmitha.palacherla'  SELECT 'Return Value' = @return\_value  GO  -- Test as employee  Update [EC].[Employee\_Hierarchy]  set Emp\_Job\_Code= 'wacs01'  where Emp\_ID = '345712'  --217635  update [EC].[Coaching\_Log]  set empid = '345712'  where formname = 'eCL-kristina.taylor-66732'  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectFrom\_Coaching\_Log\_CSRPending]  @strCSRin = N'susmitha.palacherla'  SELECT 'Return Value' = @return\_value  GO  USE [eCoachingDev]  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectReviewFrom\_Coaching\_Log]  @strFormIDin = N'eCL-kristina.taylor-66806'  SELECT 'Return Value' = @return\_value  GO  Load the files and check the following: |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 6.1 | Check coaching reason and subcoaching reason records for NPN | Should be 56 and 238/239 | P |  |
| 6.2 | Check fn for translate of Reportcode to subcoachingreasonID | Return 238 and 239 | P |  |
| 6.3 | Test sql agent load job | File should load successfully | P |  |
| 6.4 | Test File list table | Counts loaded correctly | P |  |
| 6.5 | Check strReportCode | BRL and BRN | P |  |
| 6.6 | Check Sourceid in Coaching log table | 212 | P |  |
| 6.7 | Check if logs for inactive csrs are rejected | Should go to rejected table | P |  |
| 6.8 | Check that EmailSent is set to 0 on load | EmailSent = 0 | P |  |
| 6.9 | Check records written to Fact table | Logs loaded top Coaching\_log table should also be loaded into Fact table | P |  |
| 6.10 | File should move to Backup directory after load | Check for file in Backup directory | P |  |
| 6.11 | Status of log on load | Pending Supervisor review | P |  |
| 6.12 | Csr site and program | Should populate values from emp table | P |  |
| 6.13 | Notification | supervisor | P |  |
| 6.14 | Dashboard visibility | Should be available in sup dashboard |  |  |
| 6.15 | Workflow after Sup acknowledges | Status goes to Pending emp review | P |  |
| 6.16 | Workflow after Emp acknowledges | Status goes to completed | P |  |

## TFS 8793 - Break feed (BRL/BRN) coaching logs for all non-exempt CCO employees

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | Load BRN/BRL logs for non-exempt staff |
| Test Environment | eCoaching\_Dev database on f3420-ecldbd01 |
| Code Modules created/updated | sp\_InsertInto\_Coaching\_Log\_Outlier  sp\_Update\_Outlier\_Coaching\_Stage.sql  sp\_InsertInto\_Outlier\_Rejected.sql  fn\_intModuleIDFromEmpID.sql |
| Code doc |  |
| Notes | Loaded test files and reviewed attributes and wokflow and notifications  SELECT \*  FROM [EC].[Outlier\_Coaching\_Stage]  GO  SELECT \*  FROM [EC].[Coaching\_Log]  where strReportCode = 'BRN20171101'  GO  SELECT CLR.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  where strReportCode = 'BRN20171101'  GO  SELECT \*  FROM [EC].[Outlier\_Coaching\_Fact]  where [Report\_Code] = 'BRN20171101'  GO  SELECT \*  FROM [EC].[Outlier\_FileList]  order by [File\_LoadDate]  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectCoaching4Contact]  SELECT 'Return Value' = @return\_value  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_Select\_Email\_Attributes]  @strModulein = N'LSA',  @intSourceIDin = 212,  @bitisCSEin = 0  SELECT 'Return Value' = @return\_value  GO  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 1  where EmailSent = 0  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 0  where FormName = 'eCL-kristina.taylor-66793'  DECLARE @return\_value int  EXEC [EC].[sp\_SelectReviewFrom\_Coaching\_Log]  @strFormIDin = N'eCL-sean.heuring-98109'  SELECT 'Return Value' = @return\_value  GO  --Test as log owner(sup)  SELECT \*  FROM [EC].[Employee\_Hierarchy]  where Emp\_ID = '219983'  GO  Update [EC].[Employee\_Hierarchy]  set Emp\_Job\_Code= 'WTTR13'  where Emp\_ID = '345712'  WTTR12  --336656/Martha.paredes  update [EC].[Employee\_Hierarchy]  set Sup\_ID = '345712',  Sup\_LanID = 'susmitha.palacherla'  where Emp\_ID = '219983'    update [EC].[Employee\_Hierarchy]  set Sup\_ID = '336656',  Sup\_LanID = 'Martha.paredes'  where Emp\_ID = '219983'    DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectFrom\_Coaching\_Log\_SUPPending]  @strCSRSUPin = N'susmitha.palacherla'  SELECT 'Return Value' = @return\_value  GO  -- Test as employee  Update [EC].[Employee\_Hierarchy]  set Emp\_Job\_Code= 'WTTR12'  where Emp\_ID = '345712'  --219983  update [EC].[Coaching\_Log]  set empid = '345712'  where formname = 'eCL-sean.heuring-98109'  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectFrom\_Coaching\_Log\_CSRPending]  @strCSRin = N'susmitha.palacherla'  SELECT 'Return Value' = @return\_value  GO  Load the files and check the following: |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 7.1 | Check coaching reason and subcoaching reason records for NPN | Should be 56 and 238/239 | P |  |
| 7.2 | Check fn for translate of Reportcode to subcoachingreasonID | Return 238 and 239 | P |  |
| 7.3 | Test sql agent load job | File should load successfully | P |  |
| 7.4 | Test File list table | Counts loaded correctly | P |  |
| 7.5 | Check strReportCode | BRL and BRN | P |  |
| 7.6 | Check Sourceid in Coaching log table | 212 | P |  |
| 7.7 | Check if logs for inactive csrs are rejected | Should go to rejected table | P |  |
| 7.8 | Check that EmailSent is set to 0 on load | EmailSent = 0 | P |  |
| 7.9 | Check records written to Fact table | Logs loaded top Coaching\_log table should also be loaded into Fact table | P |  |
| 7.10 | File should move to Backup directory after load | Check for file in Backup directory | P |  |
| 7.11 | Status of log on load | Pending Supervisor review | P |  |
| 7.12 | Module of log | Should   |  |  | | --- | --- | | ModuleID | Module | | 4 | LSA | | 5 | Training | | 6 | Administration | | 7 | Analytics Reporting | | 8 | Production Planning | | 9 | Program Analyst | | P | 'BRN20171101'  'BRL20171101' |
| 7.13 | Notification | supervisor | P |  |
| 7.14 | Dashboard visibility | Should be available in sup dashboard |  |  |
| 7.15 | Workflow after Sup acknowledges | Status goes to Pending emp review | P |  |
| 7.16 | Workflow after Emp acknowledges | Status goes to completed | P |  |

## TFS 7854 Data File Encryption

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | Load files from encryption directory |
| Test Environment | eCoachingDev database f3420-ECLDBD01 |
| Notes | Stage files and verify the Encryption process and load  eCl\_Outlier\_Feed\_LCS20171201.csv  eCL\_Outlier\_Feed\_IAE20171201.csv  eCL\_Outlier\_Feed\_BRN20171201.csv  eCL\_Outlier\_Feed\_MSR20171201.csv  eCL\_Outlier\_Feed\_TR220171201.csv |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 8.1 | Place unencrypted files in Encrypt\_In directory | Files encrypted and moved to Encrypt\_Out | P |  |
| 8.2 | Run sql agent Job  Right click on job CoachingTrainingLoad | Runs successfully and loads files after decrypting them. | p |  |
| 8.3 | Check Decrypt\_Out directory | Decrypted files should be deleted | p |  |
| 8.4 | Check Backup directory | Encrypted copy should be saved to backup | p |  |
| 8.5 | Check File List table | Should show decrypted file names | p |  |
| 8.6 | Verify Counts in file List table | Counts should match data in file | p |  |
| 8.7 | Check fn for translate of Reportcode to subcoachingreasonID | 29, 42, 109, 238, 239 | P |  |
| 8.7 | Check strReportCode | LCS, IAE, BRN, BRL, TR2 | P |  |
| 8.8 | Check CoachingReasonID in CLR table | 5,9,56 | P |  |
| 8.9 | Check if logs for inactive csrs are rejected | Should go to rejected table | P | LCS20171201 -1  LCS20171201- 2 |
| 8.10 | Check that records are being identified for Notification | Should be returned by Select4contact with status pending sup review. | P |  |
| 8.11 | Test Notification | Email delivered as expected. | P |  |
| 8.12 | Test Notification | Standard email attributes for non CSE Supervisor review | P |  |
| 8.13 | Test Notification | Notification date set after Notification | P |  |
| 8.14 | Test Notification | EmailSent flag set to 1 after Email delivery | P |  |
| 8.15 | Verify staging table | Should be truncated | P |  |
| 8.16 | Verify Rejected table | Should not store employee details. Minimal information | P |  |
| 8.17 | Verify FormName | Should have Employee ID instead of LanID | P |  |
| 8.18 | Review log(s) | Should display 1 for OMR/ LCS, IAE, BRN, BRL, TR2  accordingly |  | Pick records from  eCl\_Outlier\_Feed\_LCS20171201.csv  eCL\_Outlier\_Feed\_IAE20171201.csv  eCL\_Outlier\_Feed\_BRN20171201.csv  eCL\_Outlier\_Feed\_MSR20171201.csv  eCL\_Outlier\_Feed\_TR220171201.csv |

## TFS 10524 Move apps away from E Drive and TFS 10532 drop Outliers Fact table

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | Load files from encryption directory |
| Test Environment | eCoachingDev database f3420-ECLDBD01 |
| Notes | Stage files and verify the Encryption process and load  SELECT \*  FROM [EC].[Outlier\_FileList]  where DATEADD(day, DATEDIFF(day, 0, [File\_LoadDate]), 0) = DATEADD(day, DATEDIFF(day, 0, GETDATE()), 0)  order by [File\_Name]    GO  SELECT \* FROM [EC].[Coaching\_Log]  where strreportcode LIKE '%20180401'  and (strreportcode like 'BRL%' or strreportcode like 'BRN%' or strreportcode like 'LCS%')  order by coachingid  GO  SELECT CLR.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  where strreportcode LIKE '%20180401'  and (strreportcode like 'BRL%' or strreportcode like 'BRN%' or strreportcode like 'LCS%')  order by coachingid  GO  eCL\_Outlier\_Feed\_BRL20180401.csv  eCL\_Outlier\_Feed\_BRN20180401.csv  eCl\_Outlier\_Feed\_LCS20180401.csv |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 9.1 | Place unencrypted files in Encrypt\_In directory | Files encrypted and moved to Encrypt\_Out | P |  |
| 9.2 | Run sql agent Job  Right click on job CoachingOutliersLoad | Runs successfully package from share on new drive. | p |  |
| 9.3 | Run sql agent Job  Right click on job CoachingOutliersLoad | Use config file from new physical path on G Drive | P |  |
| 9.4 | Check Decrypt\_Out directory | Decrypted files should be deleted | p |  |
| 9.5 | Check Backup directory | Encrypted copy should be saved to backup | p |  |
| 9.6 | Check File List table | Should show decrypted file names | p |  |
| 9.7 | Run sql agent Job  Right click on job CoachingOutliersLoad | Should complete successfully without the Outliers Fact table. | p |  |

## TFS 11451 - New feed file for CSRs who took inappropriate action

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | Load BRN/BRL logs for non-exempt staff |
| Test Environment | eCoaching\_Dev database on f3420-ecldbd01 |
| Code Modules created/updated | sp\_InsertInto\_Coaching\_Log\_Outlier  sp\_Update\_Outlier\_Coaching\_Stage.sql  sp\_InsertInto\_Outlier\_Rejected.sql  fn\_intModuleIDFromEmpID.sql |
| Code doc |  |
| Notes | Loaded test files and reviewed attributes and wokflow and notifications  --OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert]  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()), 0)  order by [File\_Name]    GO  SELECT \* FROM [EC].[Coaching\_Log]  where strreportcode like 'PBH%'  order by coachingid  GO  SELECT CLR.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  where strreportcode like 'PBH%'  order by coachingid  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_Select\_Email\_Attributes]  @intModuleIDin = 1,  @intSourceIDin = 212,  @bitisCSEin = 0  SELECT 'Return Value' = @return\_value  GO  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectCoaching4Contact]  SELECT 'Return Value' = @return\_value  GO  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 1  where EmailSent = 0  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 0  where FormName = 'eCL-221174-141315'  DECLARE @return\_value int  EXEC [EC].[sp\_SelectReviewFrom\_Coaching\_Log]  @intLogID = 141315  SELECT 'Return Value' = @return\_value  GO  --Test as log owner(sup)  SELECT \*  FROM [EC].[Employee\_Hierarchy]  where Emp\_ID = '221174'  GO  Update [EC].[Employee\_Hierarchy]  set Emp\_Job\_Code= 'WACS40'  where Emp\_ID = '345712'  --398557  update [EC].[Employee\_Hierarchy]  set Sup\_ID = '345712'  where Emp\_ID = '221174'  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_Search\_For\_Dashboards\_Details]  @nvcUserIdin = N'345712',  @intSourceIdin = -1,  @intSiteIdin = -1,  @nvcEmpIdin = N'-1',  @nvcSupIdin = N'-1',  @nvcMgrIdin = N'-1',  @nvcSubmitterIdin = N'-1',  @strSDatein = N'2018-07-01',  @strEDatein = N'2018-07-30',  @intStatusIdin = -1,  @nvcValue = N'-1',  @nvcSearch = N'-1',  @intEmpActive = 1,  @PageSize = 500,  @startRowIndex = 1,  @sortBy = N'strSource',  @sortASC = N'y',  @nvcWhichDashboard = N'MyPending'  SELECT 'Return Value' = @return\_value  GO    update [EC].[Employee\_Hierarchy]  set Sup\_ID = '398557'  where Emp\_ID = '221174'  -- Test as employee  Update [EC].[Employee\_Hierarchy]  set Emp\_Job\_Code= 'WACS01'  where Emp\_ID = '345712'  update [EC].[Coaching\_Log]  set empid = '345712'  where formname = 'eCL-221174-141315'  update [EC].[Coaching\_Log]  set empid = '221174'  where formname = 'eCL-221174-141315'  eCL\_Outlier\_Feed\_PBH20180701.csv |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 10.1 | Check coaching reason and subcoaching reason records for PBH | Should be 9 and 245 | P |  |
| 10.2 | Check fn for translate of Reportcode to subcoachingreasonID | Return 245 | P |  |
| 10.3 | Test sql agent load job | File should load successfully | P |  |
| 10.4 | Test File list table | Counts loaded correctly | P |  |
| 10.5 | Check strReportCode | PBH | P |  |
| 10.6 | Check Sourceid in Coaching log table | 212 | P |  |
| 10.7 | Check if logs for inactive csrs are rejected | Should go to rejected table | P |  |
| 10.8 | Check that EmailSent is set to 0 on load | EmailSent = 0 | P |  |
| 10.9 | Decrypted File should be deleted | File not present in Decrypt-out |  |  |
| 10.10 | Encrypted File should move to Backup directory after load | File present in Backup directory | P |  |
| 10.11 | Status of log on load | Pending Supervisor review | P |  |
| 10.12 | Module of log | 1 | P |  |
| 10.13 | Notification | supervisor | P |  |
| 10.14 | Dashboard visibility | Should be available in sup MyPending dashboard |  |  |
| 10.15 | Workflow after Sup acknowledges | Status goes to Pending Emp review | P |  |
| 10.16 | Workflow after Emp acknowledges | Status goes to completed | P |  |

## TFS 14401 - Separate MSR file for London

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | Load MSR file for London staff |
| Test Environment | eCoaching\_Dev database on f3420-ecldbd01 |
| Code Modules created/updated | sp\_InsertInto\_Coaching\_Log\_Outlier  sp\_SelectReviewFrom\_Coaching\_Log |
| Code doc |  |
| Notes | Loaded test files and reviewed attributes and wokflow and notifications  --OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert]  SELECT [EC].[fn\_strGetUserRole] ('345712')  GO  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 1  where EmailSent = 0  UPDATE [EC].[Coaching\_Log]  SET EmailSent = 0  where FormName = ' eCL-325118-166847'  --Test as log owner and sup  update [EC].[Coaching\_Log]  set empid = '321267'  where coachingid = 166847  update ec.Employee\_Hierarchy  set emp\_job\_code = 'wacs40' where emp\_id = '345712'  select Sup\_ID from ec.Employee\_Hierarchy  where emp\_id = '321267'  --252863  update ec.Employee\_Hierarchy  set sup\_id = '345712' where emp\_id = '321267' |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 11.1 | Load file and check the Source ID  SELECT \* FROM [EC].[Coaching\_Log]  where strreportcode like 'MSR%'  and sourceid = 218  order by coachingid  GO | 218 | P |  |
| 11.2 | Load file and check the Status ID | 3 | P |  |
| 11.3 | Coaching Reason and sub coaching reason  SELECT CLR.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  where strreportcode like 'MSR%'  and sourceid = 218  order by coachingid  GO | 5 and 42 | P |  |
| 11.4 | Test File list table  SELECT \*  FROM [EC].[Outlier\_FileList]  where DATEADD(day, DATEDIFF(day, 0, [File\_LoadDate]), 0) = DATEADD(day, DATEDIFF(day, 0, GETDATE()), 0)  order by [File\_Name] | Counts loaded correctly | P |  |
| 11.5 | Check strReportCode | MSR | P |  |
| 11.6 | Check that EmailSent is set to 0 on load | EmailSent = 0 | P |  |
| 11.7 | Check Email Attributes  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_Select\_Email\_Attributes]  @intModuleIDin = 1,  @intSourceIDin = 218,  @bitisCSEin = 0  SELECT 'Return Value' = @return\_value  GO | Should be available in sup MyPending dashboard |  |  |
| 11.8 | Verify logs are selected for Notification  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectCoaching4Contact]  SELECT 'Return Value' = @return\_value  GO |  |  |  |
| 11.9 | Run Notifications job | Notifications are sent per defined attributes |  |  |
|  | Review a log  EXEC [EC].[sp\_SelectReviewFrom\_Coaching\_Log]166847 | Source id is returned  218 |  |  |
| 11.15 | Review as Emp | Status goes to Pending sup review  Custom review text for London MSR displays | P |  |
| 11.16 | Review as Sup | Status goes to completed  Custom review text for London MSR displays | P |  |

## TFS 14108 - New process for short calls.

| Item | Description |
| --- | --- |
| Change Type | Change Request |
| Change Description | New process for short calls. |
| 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 | Loaded test files and reviewed attributes and wokflow and notifications  --OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert]  SELECT [EC].[fn\_strGetUserRole] ('345712')  GO  update ec.Employee\_Hierarchy  set emp\_job\_code = 'wacs50'  where emp\_id = '236464'  update ec.Employee\_Hierarchy  set sup\_id = '236464'  where emp\_id = '227379'  update ec.Employee\_Hierarchy  set mgr\_id = '236464'  where emp\_id = '227379'  update ec.Employee\_Hierarchy  set sup\_id = '227929'  where emp\_id = '227379'  update ec.Employee\_Hierarchy  set mgr\_id = '225339'  where emp\_id = '227379' |

| TEST# | ACTION | EXPECTED RESULTS | RESULTS  P/F/I | COMMENTS |
| --- | --- | --- | --- | --- |
| 12.1 | Load file  Stage file and  Start job CoachingOutliersLoad  SELECT \*  FROM [EC].[Outlier\_FileList]  where DATEADD(day, DATEDIFF(day, 0, [File\_LoadDate]), 0) > DATEADD(day, DATEDIFF(day, 0, GETDATE()),-1)  order by [FILE\_NAME] | File should load successfully | P | eCL\_Outlier\_Feed\_ISQ20190708.csv.zip.encrypt |
| 12.2 | Check ecls generated  SELECT \* FROM [EC].[Coaching\_Log]  where strreportcode = 'ISQ20190708' | 3 | P |  |
| 12.3 | Coaching Reason and sub coaching reason  SELECT CLR.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[Coaching\_Log\_Reason]CLR  ON CL.CoachingID = CLR.CoachingID  where strreportcode = 'ISQ20190708'  order by coachingid | 9 and 23 | P |  |
| 12.4 | Short call Evaluations Table  SELECT sce.\*  FROM [EC].[Coaching\_Log]CL JOIN [EC].[ShortCalls\_Evaluations] sce  ON CL.CoachingID = sce.CoachingID  where strreportcode = 'ISQ20190708'  order by coachingid, EventDate | 18 records  CoachingID, VerintCallID, EventDate and Startdate populated | P |  |
| 12.5 | Check  Sourceid  Statusid  Empids  Submitteddate  Reportcode  moduleid | 212  6  Lanid to empid from file  2019-07-08 00:00:00.000  ISQ20190708  1 | P |  |
| 12.6 | Check that EmailSent is set to 0 on load | EmailSent = 0 | P |  |
| 12.7 | Check Email Attributes  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_Select\_Email\_Attributes]  @intModuleIDin = 1,  @intSourceIDin = 218,  @bitisCSEin = 0  SELECT 'Return Value' = @return\_value  GO | Attributes should be returned with Supervisor as receiver | P |  |
| 12.8 | Verify logs are selected for Notification  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectCoaching4Contact]  SELECT 'Return Value' = @return\_value  GO | 168505  eCL-M-237151-168505  eCL-M-227379-168503  eCL-M-231927-168504 | P |  |
|  |  |  |  |  |
| 12.9 | Verify logs selected for CSR Notification  DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectCoaching4ContactOMRShortCalls]  SELECT 'Return Value' = @return\_value  GO | eCL-M-227379-168503  eCL-M-237151-168505  eCL-M-231927-168504 | P |  |
| 12.10 | Run Notifications job | Notifications are sent per defined attributes  Both for sups and csrs | P |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| 12.1 | Exec [EC].[sp\_ShortCalls\_Get\_BehaviorList] 1 | BehaviorId BehaviorText  102 Good Call  108 Spanish Transfer  109 SSA Transfer  111 Valid Password Reset | P |  |
| 12.16 | Exec [EC].[sp\_ShortCalls\_Get\_BehaviorList] 0 | BehaviorId BehaviorText  101 Calling Kudos Line  103 Incorrect blind transfer  104 Incorrect phone status (calls still coming in)  105 Intentionally disconnecting calls  106 Not following call flow (not opening a call)  107 Not following procedure for disconnect by caller (ghost calls, greeting 3x's, template)  110 Technical Issue (CSR Error & Technical Error) | P |  |
|  |  |  |  |  |
| 12.17 | Exec [EC].[sp\_ShortCalls\_Get\_Actions] '227379', 101 | Issue verbal warning | P | Second interaction within 6 weeks for emp 227379 for ‘Calling Kudos Line’ |
| 12.18 | Exec [EC].[sp\_ShortCalls\_Get\_Actions] '227379', 103 | Start termination process | P | Second interaction within 6 weeks for emp 227379 for ‘Incorrect blind transfer’ |
|  |  |  |  |  |
| 12.19 | Exec [EC].[sp\_ShortCalls\_Get\_Actions] '227379', 110 | Coach the CSR to Immediately notify Supervisor/LSA of Technical Issues | P | First interaction within 6 weeks for emp 227379 for ‘Technical Issue (CSR Error & Technical Error)’ |
|  |  |  |  |  |
| 12.20 | Review log as sup  update ec.Employee\_Hierarchy  set emp\_job\_code = 'wacs40'  where emp\_id = '236464'  update ec.Employee\_Hierarchy  set sup\_id = '236464'  where emp\_id = '237151' | Submit successfully after entering all values  Review\_supid should be 236464  Statusid becomes 5  Attributes saved to Short call evaluations table and Coaching\_log | P | --emp\_id sup\_id Mgr\_ID  --237151 234056 231970  eCL-M-237151-168492 |
|  |  |  |  |  |
| 12.21 | Review log as Mgr  update ec.Employee\_Hierarchy  set emp\_job\_code = 'wacs40'  where emp\_id = '236464'  update ec.Employee\_Hierarchy  set mgr\_id = '236464'  where emp\_id = '237151' | Submit successfully after entering all values  Review\_mgris should be 236464  Statusid becomes 1  Attributes saved to Short call evaluations table and Coaching\_log | P | eCL-M-237151-168492 |
|  |  |  |  |  |
| 12.22 | EXEC [EC].[sp\_ShortCalls\_Get\_SupReviewDetails] 168492 | Display the details correctly | P |  |
|  |  |  |  |  |
| 12.23 | EXEC [EC].[sp\_ShortCalls\_Get\_MgrReviewDetails] 168492 | Display the details correctly | P |  |
|  |  |  |  |  |
| 12.24 | EXEC [EC].[sp\_SelectReviewFrom\_Coaching\_Log] 168492 | Display the details correctly | P |  |
|  |  |  |  |  |
| 12.25 | SELECT [EC].[fn\_intActionDisplayOrder] ('227379', 103) | 2 | P | Already has 2 interactions for employee within 6 weeks. So display last action. |
|  |  |  |  |  |
| 12.26 | DECLARE @return\_value int  EXEC @return\_value = [EC].[sp\_SelectFrom\_Coaching\_Log\_Historical\_Export]  @nvcUserIdin = N'236464',--1114688 hr user  @intSourceIdin = -1, --120 warning  @intSiteIdin = -1,  @nvcEmpIdin = N'-1',  @nvcSupIdin = N'-1',  @nvcMgrIdin = N'-1',  @nvcSubmitterIdin = N'-1',  @strSDatein = N'06/20/2019',  @strEDatein = N'07/30/2019',  @intStatusIdin = -1,  @nvcValue = N'-1',  @intEmpActive = 1      SELECT 'Return Value' = @return\_value  GO | Display the details correctly | P |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |