MAVERIC

Engineering Excellence Dashboard

User Guide and FAQ

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EE Dashboard – Content

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EE Dashboard – Introduction

Welcome to the Engineering Excellence Dashboard application—a powerful tool designed to foster a culture of uniformity and excellence in engineering practices across diverse digital projects.

In a dynamic landscape where agile methodologies and client-centric environments are prevalent, the Engineering Excellence Dashboard serves as a versatile companion, supporting projects in their pursuit of quality, best practices, and continuous improvement.

Through comprehensive assessments, metrics collection, and intuitive dashboarding, this tool empowers project teams to not only meet baseline standards but to strive for engineering excellence in every digital endeavour.

EE Dashboard – Objective

The primary objective of the Engineering Excellence Dashboard is to bring cohesion and consistency to the diverse landscape of digital projects. By comprehensively understanding the current state of engineering practices, this application empowers project teams to attain and surpass baseline standards.

The dashboard serves not only as an evaluative tool but also as a motivational force, fostering friendly competition through assessment scores and dynamic leader dashboards.

EE Dashboard – Key Features

1. Uniform Baseline Establishment:

- Facilitate the establishment of a consistent baseline for engineering best practices.
- Provide a framework to assess and understand the current state of engineering execution.

2. Assessment and Scoring System:

- Enable project teams to conduct assessments to evaluate their engineering practices.
- Implement a scoring system to objectively measure the quality of engineering execution.

3. Motivational Competitions:

- Encourage excellence through friendly competition.
- Dynamic leader dashboards showcase top-performing teams, fostering a culture of continuous improvement.

EE Dashboard – Key Features ……………………….Continue

4. Metrics Collection and Analysis:

- Collect and analyze metrics to rate the quality of engineering execution.
- Provide insights into project maturity levels, helping teams understand their processes and identify areas for improvement.

5. Cross-Project Collaboration:

- Facilitate self-improvement and cross-improvement across similar projects in different accounts.
- Enhance collaboration by sharing best practices and insights gained from assessments and metrics.

6. Agile Adaptability:

- Recognize the agile nature of project execution.
- Offer intervention strategies based on real-time assessment results to ensure projects align with client environments.

EE Dashboard – Functionality Overview

The Engineering Excellence Dashboard offers a streamlined user experience, dividing its features into three distinct roles: User, Reviewer, and Admin. Each role is tailored to specific responsibilities, ensuring a comprehensive and efficient platform for managing engineering best practices.

1. **User Role** – Functionality under user role is Dashboard Viewing , View existing assessments and take assessments, View existing metrics and submit metrics and reports.

2. **Reviewer Role** – In addition to user functionality, Reviewers able to evaluate and approve & reject assessments and metrics.

3. **Admin Role** – In addition to user functionality, Admin have a capabilities for managing template.

EE Dashboard – User Flow

1. Dashboard Viewing:

- Users have access to a dashboard providing an overview of their assessments, metrics, and latest 10 assessments and metrics.

2. Assessments :

- View existing assessments.
- Initiate and submit new assessments.

3. Metrics :

- Access existing metrics data.
- Submit new metrics.

4. Reports:

- View comprehensive reports summarizing submitted, approved, and rejected metrics and assessments in a tabular format.

EE Dashboard – User Flow (Dashboard)

1. Login and Dashboard Access:
   1. After a successful login, users will be directed to the dashboard.
   2. Alternatively, users can click the "Dashboard" tab to access the main dashboard.

2. Dashboard Overview:
   1. Users can view key metrics such as total accounts, total projects, total assessments, and total metrics.

3. Charts Display:
   1. Assessment and metric charts provide a visual representation of submission statuses (submitted, approved, rejected).

4. Date-wise and Periodic Analysis:
   1. Users can analyze submitted assessments and metrics through bar charts, allowing them to understand trends both date-wise and periodically based on dropdown selections.

5. Latest Assessments and Metrics:
   1. A section displays the latest 10 assessments and metrics for quick reference.

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EE Dashboard – User Flow (Assessments)

1. **Accessing Assessments:**
    1. Clicking the "Assessments" tab takes users to the "My Assessment" page, where existing assessments and the option to take a new assessment are available.
2. **Assessment Overview:**
    1. Existing assessments are displayed in a table format, providing details such as project code, project name, account, submission date, review date, reviewer information, and status (saved, submitted, approved, rejected).
3. **Navigation to Action Pages:**
    1. Clicking on the action CTA (Call to Action) button navigates the user to pages specific to approved, rejected, submitted, or saved assessments.
4. **Taking a New Assessment:**
    1. To initiate a new assessment, users can click the "Take Assessment" CTA and navigate through a series of screens to select delivery competency unit, account, project name, project type, and template type.
5. **Answering Questions:**
    1. Users answer questionnaires and select options on subsequent screens.
    2. Options can be reset if needed, and the assessment can be saved during progress.
6. **Submitting Assessment:**
    1. Upon completing the assessment, users submit it for review.
    2. A confirmation message indicates successful submission.

EE Dashboard – User Flow (Metrics)

1. **Accessing Metrics:**
    1. Clicking the "Metrics" tab takes users to the "My Metrics" page, where existing metrics and the option to submit new metrics are available.
2. **Metrics Overview:**
    1. Existing metrics are displayed in a table format, providing details similar to assessments, along with CTA buttons for various actions.
3. **Navigation to Action Pages:**
    1. Clicking on the action button navigates the user to pages specific to approved, rejected, submitted, or saved metrics.
4. **Submitting New Metrics:**
    1. To submit new metrics, users click the "Submit Metrics" button and proceed through selecting delivery competency unit, account, project name, project type, and template type.
5. **Answering Questions:**
    1. Users answer questionnaires, with options that can be reset, and metrics can be saved during progress.
6. **Submitting Metrics:**
    1. Upon completing metric submission, users click "Submit".
    2. A confirmation message indicates successful submission.

EE Dashboard – User Flow (Reports)

1. Accessing Reports:

1. User clicks the "Reports" tab.

2. Reports Page:

1. User is landed on the Reports page.

3. Assessment and Metrics Reports:

1. In two tabular formats, Assessment Reports and Metrics Reports are visible, including statuses (submitted, approved, rejected) and action buttons.

4. Navigation to Action Pages:

1. Clicking on the action button navigates the user to specific pages such as submitted, approved, or rejected reports.

5. Pagination for More Records:

1. The user can use the pagination tab if they want to view more than five assessments or metrics.

EE Dashboard – Reviewers Flow

In addition to the User functionality, Reviewers have special capabilities for evaluating and approving assessments and metrics.

- **Review Assessments:**
  - Access submitted assessments for review.
  - Provide feedback and comments.
  - Approve or reject assessments with remarks.

- **Review Metrics:**
  - Examine submitted metrics for accuracy and completeness.
  - Approve or reject metrics submissions with detailed feedback.

EE Dashboard – Reviewer Flow (Review Assessments)

1. Accessing Review Assessments and Metrics:

- The Reviewer clicks on the "Review Assessments and Metrics" tab.
- The Reviewer is directed to the "Review Assessment and Pending" page.

2. Reviewing Pending Assessments:

- The Reviewer views pending assessments for review in a tabular format.
- Columns include project code, project name, account, delivery unit, submitted date, and CTA (Call to Action) for review.
- If there are more than 5 pending assessments, pagination is available for efficient navigation.

3. Reviewing an Assessment:

- Clicking on the CTA button of a specific submitted assessment navigates the Reviewer to the questionnaires screen.
- The Reviewer evaluates the submitted assessment, viewing questionnaires and the health score.
- The Reviewer provides comments in the comment box.
- Based on the assessment, the Reviewer can either approve or reject it.

EE Dashboard – Reviewer Flow (Review Metrics)

1. Accessing Review Assessments and Metrics:

- The Reviewer clicks on the "Review Assessments and Metrics" tab.
- The Reviewer is directed to the "Review Assessment and Pending" page.

2. Reviewing Pending Metrics:

- Below the pending assessments, the Reviewer views pending metrics for review in a tabular format.
- Columns include project code, project name, account, delivery unit, submitted date, and CTA action.
- If there are more than 5 pending metrics, pagination is available for efficient navigation.

3. Reviewing a Metric:

- Clicking on the action button of a specific submitted metric navigates the Reviewer to the questionnaires screen.
- The Reviewer evaluates the submitted metric, viewing questionnaires.
- The Reviewer provides comments in the comment box.
- Based on the metric, the Reviewer can either approve or reject it.

EE Dashboard – Admin Flow

Admins possess all functionalities available to Users, with additional capabilities for managing template.

Template Management:

- Create new templates for assessments and metrics based on project types.
- Enable/disable existing templates to accommodate evolving project needs.

Template Overview :

Definition:

- Templates are questionnaires tailored to specific project types.
- They guide users during assessments and metrics submissions.

User Interaction:

- Templates are presented to users during assessments, ensuring standardized evaluation criteria.

Admin Control:

- Admins can create new templates.
- Enable or disable templates as per project requirements.

EE Dashboard – Admin Flow (Assessment Template)

1. Accessing Assessment Templates:

- Admin clicks on "Manage Template" for assessments.
- Admin lands on the Manage Template page for assessments.
- Existing assessment templates and an "Add Assessment Template" CTA are visible.

2. Viewing Existing Assessment Templates:

- Admin views existing assessment templates in a tabular format.
- Columns include template name, created by, project type, created on, and CTA action.
- Pagination is available for efficient navigation.

3. Enabling/Disabling Assessment Templates:

- Admin can enable or disable assessment templates by sliding the button under the action column.

4. Adding Assessment Template:

- Admin clicks on the "Add Assessment Template" CTA.
- Navigates to the "Create Assessment Template" page.
- Admin inputs template name, template description, selects the project type, and uploads a valid JSON.
- Clicks on "Preview Template."
- Admin previews the template and verifies details.
- If satisfied, clicks on the "Create Template" CTA button.
- The assessment template is created successfully.

EE Dashboard – Admin Flow (Metrics Template)

1. Accessing Metric Templates:

- Admin clicks on "Manage Template" for metrics.
- Admin lands on the Manage Template page for metrics.
- Existing metric templates and an "Add Metric Template" CTA are visible.

2. Viewing Existing Metric Templates:

- Admin views existing metric templates in a tabular format.
- Columns include template name, created by, project type, created on, and CTA action.
- Pagination is available for efficient navigation.

3. Enabling/Disabling Metric Templates:

- Admin can enable or disable metric templates by sliding the button under the action column.

4. Adding Metric Template:

- Admin clicks on the "Add Metric Template" CTA.
- Navigates to the "Create Metric Template" page.
- Admin inputs template name, template description, selects the project type, and uploads a valid JSON.
- Clicks on "Preview Template."
- Admin previews the template and verifies details.
- If satisfied, clicks on the "Create Template" CTA button.
- The metric template is created successfully.

EE Dashboard – FAQ (User Flow)

- **Question** - How can users access the dashboard?

  Answer - Users can access the dashboard either after a successful login or by clicking the "Dashboard" tab.

- **Question** - What key metrics are displayed on the dashboard?

  Answer - Key metrics such as total accounts, projects, assessments, and metrics are displayed on the dashboard.

- **Question** - Explain the purpose of the assessment and metric charts on the dashboard.

  Answer - The assessment and metric charts provide a visual representation of submission statuses.

- **Question** – How do users initiate a new assessment?

  Answer - Users initiate a new assessment by clicking the "Assessments" tab and selecting the "Take Assessment" CTA.

EE Dashboard – FAQ (User Flow)

- **Question** - Can users save assessments in progress, and if so, how?

  Answer - Yes, users can save assessments in progress, ensuring flexibility in completing assessments.

- **Question** - How do users submit new metrics?

  Answer - Users submit new metrics by clicking the "Metrics" tab and selecting the "Submit Metrics" button.

- **Question** - Is it possible to reset options while answering questions for metrics?

  Answer - Yes, users can reset options while answering questions for metrics, providing flexibility in the submission process.

- **Question** - How can users access reports?

  Answer - Users access reports by clicking the "Reports" tab.

- **Question** - What information is available in the Assessment and Metrics Reports tabular formats?

  Answer - The Assessment and Metrics Reports tabular formats display details such as submitted, approved, and rejected statuses.

EE Dashboard – FAQ (Reviewer Flow)

- **Question** - What details are visible in the table of pending assessments for review?

  Answer - Details in the table of pending assessments include project code, name, account, delivery unit, submission date, and CTA for review.

- **Question** - Describe the steps Reviewers take to approve or reject an assessment.

  Answer – Reviewer choose the submitted assessments and click on view button, it navigate them to questionnaires page to approve or reject an assessment after clicking the CTA button.

- **Question** - How can Reviewers review pending metrics?

  Answer - Reviewers review pending metrics below the pending assessments in a tabular format.

- **Question** - What information is displayed in the table of pending metrics?

  Answer - Information displayed includes project code, name, account, delivery unit, submission date, and CTA action.

- **Question** - What actions can Reviewers take when reviewing a submitted metric?

  Answer - Reviewers choose the submitted metric for review and click on view button, it navigate them to questionnaires page to approve or reject a metric after clicking the action button.

EE Dashboard – FAQ (Admin Flow)

- **Question** - How do Admins access the "Manage Template" page for assessments?

  Answer - Admins access the "Manage Template" page for assessments by clicking on the respective tab.
- **Question** - What details are visible in the table of existing assessment templates?

  Answer - Details in the table include template name, created by, project type, created on, and CTA action.
- **Question** - Explain the process of enabling or disabling an assessment template.

  Answer - Admins can enable or disable assessment templates by sliding the button under the action column.
- **Question** - What steps are involved in creating a new assessment template?

  Answer - Admins create a new assessment template by clicking the "Add Assessment Template" CTA.
- **Question** -How does Admin preview a template before creating it?

  Answer - The process involves inputting template name, description, selecting project type, and uploading a valid JSON.
- **Question** - How do Admins access the "Manage Template" page for metrics?

  Answer - Admins access the "Manage Template" page for metrics by clicking on the respective tab.

EE Dashboard – FAQ (Admin Flow)

- **Question** - What details are visible in the table of existing metric templates?

  Answer - Details in the table include template name, created by, project type, created on, and CTA action.

- **Question** - Describe the process of enabling or disabling a metric template.

  Answer - Admins can enable or disable metric templates by sliding the button under the action column.

- **Question** - What steps are involved in creating a new metric template?

  Answer - Admins create a new metric template by clicking the "Add Metric Template" CTA.

- **Question** - How does Admin preview a metric template before finalizing it?

  Answer - The process involves inputting template name, description, selecting project type, and uploading a valid JSON.

- **Question** - How does Admin preview a metric template before finalizing it?

  Answer - Admins preview the template and, if satisfied, create it using the "Create Template" CTA button.

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Roles

User

- Select the questionnaire by choosing the project and project type
- Respond to the assessment/metrics survey
- Attach proofs as needed and submit the assessment
- Save and resume a survey
- View dashboard and existing reports

Reviewer

- Same as user Role
- Review assessment/metric response , view attachments.
- Approve or Reject with comments
- Can review any assessment not reviewed so far.

Admin

- Same as user role
- Add new assessment and metric templates
- Enable and disable existing templates
- Update user roles (TBD)