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eCoaching Dashboard Website

Detail Design

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| --- | --- | --- |
| Last Revision | Last Review | Description |
| 6/2/2017 |  | TFS 6197 – Request for two new feeds from Performance Scorecards |

Prepared by: Jourdain Augustin Date: September 10, 2014

Department, Location: Engineering, Arlington

**Approved by: Date:**

**Change History Log**

| **Date** | **Change Description** | **Author** |
| --- | --- | --- |
| 09/10/2014 | Initial Draft | Jourdain Augustin |
| 09/12/2014 | P13506 – Updated dashboard restriction for ARC CSRs to be for any WACS\* job code –  2.2.2.3.3 - page 6  2.3.1 - page 11  Also updated review pages to show coaching reason, coaching sub reason and coaching reason value as dynamic rows displayed  2.3.3 - dynamic - page 15, page 20  2.3.5 - page 25, page 28, 29 | Jourdain Augustin |
| 09/17/2014 | P13512 – Updated references of “CSR” to “Employee” in review and historical dashboard review pages.  2.3.3. - page 17, 18, 19  2.3.5 - page 25, 26, 27  Also updated DDD to reflect dashboard changes already in existence for status dropdown menus and comment texts  2.2.2.2.1, 2.2.2.2.2, 2.2.2.2.3, - page 6  2.3.1 – page 8, 9, 10, 11  2.3.2 - page 13, 14, 15  2.3.3 - page 16, 18, 21  2.3.4 – page 22, 23 | Jourdain Augustin |
| 10/10/2014 | P13479 - Add WARNING question in the eCoaching Log  2.3.1 - page 10, 12, 13 | Jourdain Augustin |
| 10/17/2014 | P13622 - eCoaching - Review Page OMR Research SOP Link   1. 2.3.3 - page 18 2. Added 2.3.6 – page 29 - 30 | Jourdain Augustin |
| 11/04/2014 | P13753 – eCoaching – Updated dashboards to allow WPWL51 users to have manager access to dashboards:  1. 2.2.2.1.3 added WPWL51 to manager level users (page 6)  2. 2.2.2.3.2 added WPWL51 to manager level users (page 6)  3. 2.2.2.4.1 added WPWL51 to historical dashboard level users (page 7)  4. 2.2.2.5.1 added WPWL51 to historical dashboard review (page 7)  5. 2.3.1 added WPWL51 to manager view of main dashboard (page 7)  6. 2.3.2 added WPWL51 to my submission group of my submission dashboard (page 15)  7. 2.3.4 added WPWL51 to historical dashboard level users (page 23) | Jourdain Augustin |
| 11/21/2014 | P13822 - Disable review for ARCs on My Submissions page: 1. Added new assumption 2.2.2.2.4 ARC CSRs may not open records they have submitted (page 7) | Jourdain Augustin |
| 12/17/2014 | P13891 - maintain original hierarchy values :   1. Updated Review page with “strReviewer” to capture supervising signature owner – page 23 – 2.3.3 2. Updated Review2 page with “strReviewer” to capture supervising signature owner – page 28 – 2.3.5. | Jourdain Augustin |
| 01/12/2015 | P14043 – OMR SOP link needs updating:   1. Updated review page with change to OMR SOP link text and URL – page 21 – 2.3.3 | Jourdain Augustin |
| 02/04/2015 | P14065 – Added HR users to Historical Dashboard users  Page 9 - 2.2.2.4.1  Added HR users to Historical Dashboard Review users  Page 9 - 2.2.2.5.1 | Jourdain Augustin |
| 02/13/2015 | P14065 – Added “Warning” to Historical Dashboard Source dropdown menu for HR users only  Page 27 – 2.3.4 | Jourdain Augustin |
| 02/18/2015 | P14304 - Display coachingreason / subcoachingreason in warning section    2.3.1 - page 13 - add "Warning Type" and "Warning Reason(s) to manager warning table  2.3.1 - page 15 - corrected job code association with 2nd warning table from duplicate manager codes to supervisor code WACS40  2.3.1 - page 16 - removed extra column "Source" in warning table and removed “strFormStatus”  2.3.1 - page 16 - add "Warning Type" and "Warning Reason(s) to supervisor warning table and removed “strFormStatus” | Jourdain Augustin |
| 03/18/2015 | P14422 - eCoaching - Dashboard enhancements - 2.3.1, 2.3.2, 2.3.4   1. Updated main and my submission dashboards to include "Sub-coaching Reason" and "Value" columns in all tables except for Warning tables 2. Renamed "CSR Name" to "Employee Name" column headers for all dashboard tables 3. Replaced static list dropdown menus with lists from database sources 4. Updated filter field names from generic names to content specific name 5. Added Submitter filter to historical dashboard 6. Replaced individual opportunity and reinforcement filters for historical dashboard to new "Value" filter 7. Added "Submitter Name" column to historical dashboard 8. Updated all headers from “strSource” to “Source” 9. Updated all headers from “strFormStatus” to “Status” | Jourdain Augustin |
| 03/25/2015 | P14422 - eCoaching - Dashboard enhancements - 2.3.1, 2.3.2, 2.3.4   1. Updated main and my submission dashboards to include "Coaching Reason" column in all tables except for Warning tables | Jourdain Augustin |
| 03/25/2015 | P14423 - eCoaching - extend dashboard hierarchy to sr. managers and above:   1. Added assumption 2.2.2.15 for users with role “SRMGR” in EC.Historical\_Dashboard\_ACL table being able to view hierarchy data – p.12 2. Correction – added “Warning Dashboard Review” section 2.2.2.8 and 2.2.2.8.1 to assumptions 3. Correction – Updated condition for supervisor or non CSR and non MGR (others) display – p. 16 4. Correction – Updated dashboard title condition for miscellaneous user display – p. 16 5. Added sr. management table on section 2.3.1 – view2.aspx (p18-19). | Jourdain Augustin |
| 03/27/2015 | P14423 – Updated view2.aspx to include “My Hierarchy Warning eCoaching Logs”  added 2.2.2.5.2 - users with "SRMGR" role opens hierarchy records in historical dashboard review page  updated 2.2.2.8.1 - added senior managers to warning dashboard review page | Jourdain Augustin |
| 04/02/2015 | P14422 – Updated view4.aspx to replace “Opportunity” and “Reinforcement” columns of historical dashboard with “Coaching Reason”, “Sub-Coaching Reason” and “Value” column” | Jourdain Augustin |
| 04/21/2015 | P14676 – Added Export to Excel function on Historical Dashboard page.  Updated 2.3.4 eCoaching Historical Dashboard page. | Lili Huang |
| 04/29/2015 | P14840 – Updated Sr. MGR section of main dashboard (view2.aspx) – 2.3.1 – to include submitted date range filters – page 20. | Jourdain |
| 05/05/2015 | P14881 – Authentication  Updated:  2.3.1 eCoaching Main Dashboard page (view2.aspx – secure)  2.3.2 eCoaching My Submitted Dashboard page (view3.aspx – secure)  2.3.3 eCoaching Dashboard Review page (review.aspx – secure)  2.3.4 eCoaching Historical Dashboard page (view4.aspx – secure)  2.3.5 eCoaching Historical Dashboard Review page (review2.aspx – secure)  2.3.6 eCoaching Historical Dashboard Review page (review3.aspx – secure) | Lili Huang |
| 05/20/2015 | P14818 - CCO eCoaching - Incorporate Low CSAT feed into eCL  Update review page to display “Details of the behavior being coached:” section regardless of condition.  2.3.5- page 26-34  Also update review page to display “Management Notes” section if “Notes from Manager” are not displayed to prevent duplication  2.3.5- page 27-31 | Jourdain Augustin |
| 05/28/2015 | P14818 – CCO eCoaching – Incorporate Low CSAT feed into eCL Update review page to display specific message text when record is in pending manager review –  page 28, 2.3.3 - eCoaching Dashboard Review page | Jourdain Augustin |
| 06/05/2015 | 14893 – Historical Dashboard Performance Round 2  Updated 2.3.4 eCoaching Historical Dashboard page | Lili Huang |
| 06/08/2015 | 14916 – Added WHRC\* users to have access to Historical Dashboard/Review | Lili Huang |
| 07/01/2015 | 14996 – Duplicate Lan IDs  Updated: 2.3.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 07/20/2015 | 13631 (TFS 119) – Coaching Notes overwritten  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 07/20/2015 | TFS 369 – Coaching Notes is not being displayed on CSR Review/acknowledge page  Updated : 2.4.3 eCoaching Dashboard Review page (review.aspx – secure)   * Coaching Notes display logic. | Lili Huang |
| 9/15/2015 | TFS 633 – Disable Historical Dashboard Extract to Excel for Supervisors  Updated: 2.4.4 eCoaching Historical Dashboard Page (view4.aspx – secure)  TFS 689 – Inappropriate ARC escalation feed  Updated: 2.4.3 eCoaching Dashboard Review Page (review.aspx – secure) | Lili Huang |
| 11/3/2015 | TFS 1089 – Open CSR Comments field on Review Page  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 12/9/2015 | TFS 1410 – Warning section display on My Dashboard  Updated: 2.4.1 eCoaching Main Dashboard page (view2.aspx – secure) | Lili Huang |
| 12/15/2015 | TFS 1472 – Add job code WHHR70  Updated: 2.3 Permissions | Lili Huang |
| 02/17/2016 | TFS 1990 – OMR Short Calls feed with Manager Review  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 02/22/2016 | TFS 1925 – LCS: allow hierarchy managers to see the record on review page (readonly)  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 03/04/2016 | TFS 1881 – Add Short Duration Reporting records (Trainng SDR) to eCoaching  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 03/09/2016 | TFS 2196 – CSR Comments not appearing in completed logs from IQS  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 03/22/2016 | TFS 2308 – Overdue Training feed.  Updated: 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 04/08/2016 | TFS 2432 - Separate solution for HR access;  Updated 2.3 Permissions | Lili Huang |
| 06/24/2016 | TFS 2826 – Coach the Coach data feed  Update 2.4.3 &2.4.5 | Lili Huang |
| 07/25/2016 | TFS 3252 – High CSAT 5 data feed | Lili Huang |
| 09/19/2016 | TFS 3991 – Attendance data feed | Lili Huang |
| 10/27/2016 | TFS 4102 - Include Yes/No value to coaching monitor question. | Lili Huang |
| 11/09/2016 | TFS 4102 – Include Yes/No value to coaching monitor question. | Lili Huang |
| 12/06/2016 | TFS 3878 – Email comments entered by CSRs to hierarchy when logs are completed  Updated 2.4.3 eCoaching Dashboard Review page | Lili Huang |
| 2/1/2017 | TFS 5404 – Allow users with job codes starting “WPOP” to access Historical Dashboard. | Lili Huang |
| 4/14/2017 | TFS 6188 – New data feed through OMR for CSRs exceeding the number of breaks and the length of breaks | Lili Huang |
| 4/21/2017 | TFS 6392 – Add OMR Break feeds (BRN and BRL) to Quality module | Lili Huang |
| 5/2/2017 | TFS 6528 – Change URL for Share Point report for BRN/BRL feeds | Lili Huang |
| 5/4/2017 | TFS 6540 – Change static text for BRN/BRL from feeds | Lili Huang |
| 6/1/2017 | TFS 6881 – Add new main not coachable reasons for OMR IAE logs.  Updated 2.4.3 eCoaching Dashboard Review page (review.aspx – secure) | Lili Huang |
| 6/2/2017 | TFS 6197 – Request for two new feeds from Performance Scorecards | Lili Huang |

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# Design Criteria

## Location Grid

The following grid details approximately where a given item should be placed on the actual page when written in the page design in the functional specifications and DDDs. For example, an item is labeled <A—1> and would then be located in the upper left hand corner of the screen. If an item is labeled as <AB—1>, then that item is in both A and B portions of the grid. If an item is labeled <A—12>, then that item is located in both 1 and 2 portions on the grid.

|  | **A** | **B** | **C** | **D** |
| --- | --- | --- | --- | --- |
| 1 | A-1 | B-1 | C-1 | D-1 |
| 2 | A-2 | B-2 | C-2 | D-2 |
| 3 | A-3 | B-3 | C-3 | D-3 |
| 4 | A-4 | B-4 | C-4 | D-4 |
| 5 | A-5 | B-5 | C-5 | D-5 |
| 6 | A-6 | B-6 | C-6 | D-6 |

# eCoaching Dashboards

## Purpose

The eCoaching Dashboards shall be access points to view existing eCoaching logs.

## Assumptions

* The eCoaching Dashboards will not be 508 compliant
* The following users will have access to the eCoaching Dashboards according to their employee job codes:

## Permissions

Human Resource users with job codes starting with “WHRC” will not have access to eCoaching web application.

### Main Dashboard

* CSR level users – WACS0\*
* Supervisor level users - \*40, WTTR12, WTTI\*
* Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL51
* Support Staff users – WSQE\*, WACQ\*
* Users who are in the database table “EC.Historical\_Dashboard\_ACL” table as a sr. manager user (Role = “SRMGR”) will be able to view hirearchy data report
* Human Resource users will not have access.

### Main Dashboard Review

* users who are the Employee of the record
* users who are the Supervisor of the record’s Employee in record or hirearchy
* users who are the Manager of the record’s Employee’s Supervisor in record or hirearchy
* users who are in the database table “EC.Historical\_Dashboard\_ACL” table as an ARC user (Role = “ARC”) and Job Code (WACS\*) can not open records they have submitted
* Human Resource will not have access

### My Submitted

* Supervisor level users - \*40, WTTR12, WTTI\*
* Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL51
* Support Staff users – All other users except for users with CSR Job codes WACS\* who are not in table EC.Historical\_Dashboard\_ACL with “ARC” Role)
* Human Resource users will not have access

### Historical Dashboard

* Supervisor and above level users - \*40, \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WSQE\*, WACQ\*, WEEX\*, WISY\*, WPWL51, WHER\*, WHHR\*, WPOP\*

### Historical Dashboard Review

* Supervisor and above level users - \*40, \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WSQE\*, WACQ\*, WEEX\*, WISY\*, WPWL51, WHER\*, WHHR\*, WPOP\*
* User with “SRMGR” role in EC.Historical\_Dashboard\_ACL table
* Users who are in the database table “EC.Historical\_Dashboard\_ACL” table as an historical exception user (Role = “ECL”) can open any record
* Access to an eCoaching Dashboard web page will be authenticated via the table EC.Employee\_Hierarchy

### Warning Dashboard Review

* Supervisor, manager, senior managers and HR level users - WACS40, WACS50, WACS60, SRMGR, WHER\*, and WHHR\*

## Page Description

### eCoaching Main Dashboard page (view2.aspx – secure)

This page shall be displayed if a user has been authenticated to access the vangent.local network (this includes ad.local users accessing servers on the vangent.local network) and are an authorized user per assumptions in section 2.2. Users who are not authenticated and authorized will be redirected to the page – error3.aspx.

A user will be authenticated upon entering eCoaching Log web site. Once a user has been authenticated, the user will not be authenticated again when the user tries to access the page. Authorization will be done only on page non post back.

| **Control Type** | **Format** | | | **Text or Description** | **Field Content/Action** | **Field Length** |
| --- | --- | --- | --- | --- | --- | --- |
| Page Header | | | | | | |
| Image | BC-1 | | ajax-loader5.gif | | Display the progress image when a database search is being processed to populate the dropdowns. | N/A |
| If user job code is one of the following (\*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*,WPWL51 ) then display the following | | | | | | |
| Header | | A-1 | “Welcome to the Manager Dashboard” | | N/A | N/A |
| Header | | A-1 | “My Pending eCoaching Logs | | N/A | N/A |
| Dropdown | | A-1 | [ddSUP1] | | Dropdown contains the list of Supervisors for the user’s eCoaching records. | N/A |
| Dropdown | | D-1 | [ddCSR1] | | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Table | | ABCD-1 | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# | | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to modify record. | N/A |
| Header | | A-3 | “My Team’s Pending eCoaching Logs | | N/A | N/A |
| Dropdown | | A-3 | [ddSUP1] | | Dropdown contains the list of Supervisors for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-3 | [ddCSR1] | | Dropdown contains the list of Employees for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-3 | [ddSource2] | | Dropdown contains the list of eCoaching sources.  OnChange, generates report with selected values | N/A |
| Table | | ABCD-3 | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Source | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #strSource# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
| Header | | A-5 | “My Team’s Completed eCoaching Logs | | N/A | N/A |
| Dropdown | | A-5 | [ddSUP1] | | Dropdown contains the list of Supervisors for the user’s eCoaching records. | N/A |
| Dropdown | | A-5 | [ddCSR1] | | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Dropdown | | A-5 | [ddSource] | | Dropdown contains the list of eCoaching sources.  OnChange, generates report with selected values | N/A |
| Text | | B-5 | Submitted: | |  | N/A |
| Text Field | | B-5 | [Date1] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date1 field with selected date | N/A |
| Text Field | | B-5 | [Date2] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date2 field with selected date | N/A |
| Button | | B-5 | [Button1] | | onClick generates new report for section | N/A |
| Table | | ABCD-5 | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Created Date | Coaching Reason | Sub-coaching Reason | Value | Source | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CreatedDate# PDT | #CoachingReason# | #SubCoachingReason# | #value# | #strSource# | | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
| Header | | A-3 | “My Completed eCoaching Logs | | N/A | N/A |
| Table | | ABCD-3 | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubcoachingReason# | #value# | #CreatedDate# PDT | | | FormId will be a link opening review.aspx to view record. | N/A |
| If user job code is WACS50 or WACS60 then display the following | | | | | | |
| Header | | A-5 | “My Team’s Warning eCoaching Logs | | N/A | N/A |
| Text | | A-5 | Filter: | |  | N/A |
| Dropdown | | A-5 | [ddState] | | Dropdown contains the list of eCoaching states  OnChange, generates report with selected values | N/A |
| Text | | B-5 | Submitted: | |  | N/A |
| Text Field | | B-5 | [Date5] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date5 field with selected date | N/A |
| Text Field | | B-5 | [Date6] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date6 field with selected date | N/A |
| Button | | B-5 | [Button1] | | onClick generates new report for section | N/A |
| Table | | ABCD-5 | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Warning Type | Warning Reason(s) | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #CoachingReason# | #SubCoachingReason# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review3.aspx to view record. | N/A |
|  | | | | | | |
|  | | | | | | |
| For users other than CSR and Manager, display the following | | | | | | |
| Header | | A-1 | “Welcome to the Supervisor Dashboard”  Or  “Welcome to the eCL Dashboard” | | If user is a miscellaneous user (not a CSR, Supervisor, Manager, instructor or trainer) then title is the following:  “Welcome to the eCL Dashboard” | N/A |
| Header | | A-1 | “My Pending eCoaching Logs | | N/A | N/A |
| Table | | ABCD-1 | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #Value# | #CreatedDate# | | | FormId will be a link opening review.aspx to modify record. | N/A |
| Header | | A-3 | “My Team’s Pending eCoaching Logs | | N/A | N/A |
| Dropdown | | A-3 | [ddCSR3] | | Dropdown contains the list of Employees for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-3 | [ddSource3] | | Dropdown contains the list of eCoaching sources.  OnChange, generates report with selected values | N/A |
| Table | | ABCD-3 | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Source | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #strSource# | #CoachingReason# | #SupCoachingReason# | #value# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
| Header | | A-5 | “My Team’s Completed eCoaching Logs | | N/A | N/A |
| Dropdown | | A-5 | [ddMGR2] | | Dropdown contains the list of Managers for the user’s eCoaching records. | N/A |
| Dropdown | | A-5 | [ddCSR2] | | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Dropdown | | A-5 | [ddSource4] | | Dropdown contains the list of eCoaching sources.  OnChange, generates report with selected values | N/A |
| Text | | B-5 | Submitted: | |  | N/A |
| Text Field | | B-5 | [Date3] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date1 field with selected date | N/A |
| Text Field | | B-5 | [Date4] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date2 field with selected date | N/A |
| Button | | B-5 | [Button2] | | onClick generates new report for section | N/A |
| Table | | ABCD-5 | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Source | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #strSource# | #CoachingReason# | #SubcoachingReason# | #value# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
| Header | | A-3 | “My Completed eCoaching Logs | | N/A | N/A |
| Table | | ABCD-3 | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | | FormId will be a link opening review.aspx to view record. | N/A |
| Header | | A-5 | “My Team’s Warning eCoaching Logs | | N/A | N/A |
| Text | | A-5 | Filter: | |  | N/A |
| Dropdown | | A-5 | [ddState7] | | Dropdown contains the list of eCoaching states  OnChange, generates report with selected values | N/A |
| Text | | B-5 | Submitted: | |  | N/A |
| Text Field | | B-5 | [Date7] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date7 field with selected date | N/A |
| Text Field | | B-5 | [Date8] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date8 field with selected date | N/A |
| Button | | B-5 | [Button1] | | onClick generates new report for section | N/A |
| Table | | ABCD-5 | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Warning Type | Warning Reason(s) | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #CoachingReason# | #SubCoachingReason# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review3.aspx to view record. | N/A |
|  | | | | | | |
| If user job code is a CSR job code ("WACS\*") then display the following | | | | | | |
| Header | A-1 | | “Welcome to the CSR Dashboard” | | N/A | N/A |
| Header | A-1 | | “My Pending eCoaching Logs | | N/A | N/A |
| Table | ABCD-1 | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | | FormId will be a link opening review.aspx to modify record. | N/A |
| Header | A-3 | | “My Completed eCoaching Logs | | N/A | N/A |
| Table | ABCD-3 | | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | | FormId will be a link opening review.aspx to view record. | N/A |
|  | | | | | | |
| If user has role “SRMGR” in EC.Historical\_Dashboard\_ACL then display the following | | | | | | |
| Header | | A-5 | My Hierarchy eCoaching Logs | | N/A | N/A |
| Text | | A-5 | Filter: | |  | N/A |
| Dropdown | | A-5 | [ddMGR5] | | Dropdown contains the list of Managers for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-5 | [ddSUP5] | | Dropdown contains the list of Supervisors for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-5 | [ddEMP5] | | Dropdown contains the list of Employees for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-5 | [ddSource5] | | Dropdown contains the list of eCoaching sources.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-5 | [ddStatus5] | | Dropdown contains the list of eCoaching statuses  OnChange, generates report with selected values | N/A |
| Text | | B-5 | Submitted: | |  | N/A |
| Text Field | | B-5 | [Date9] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date7 field with selected date | N/A |
| Text Field | | B-5 | [Date10] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date8 field with selected date | N/A |
| Button | | B-5 | [Button5] | | onClick generates new report for section | N/A |
| Table | | ABCD-5 | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Source | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #strSource# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review2.aspx to view record. | N/A |
| Header | | A-5 | My Hierarchy Warning eCoaching Logs | | N/A | N/A |
| Text | | A-5 | Filter: | |  | N/A |
| Dropdown | | A-5 | [ddState6] | | Dropdown contains the list of eCoaching states  OnChange, generates report with selected values | N/A |
| Text | | B-5 | Submitted: | |  | N/A |
| Text Field | | B-5 | [Date9] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date9 field with selected date | N/A |
| Text Field | | B-5 | [Date10] | |  | N/A |
| Image | | B-5 | [Calendar\_scheduleHS.png] | | onClick opens script to poputlate Date10 field with selected date | N/A |
| Button | | B-5 | [Button1] | | onClick generates new report for section | N/A |
| Table | | ABCD-5 | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | Employee Name | Supervisor Name | Manager Name | Status | Warning Type | Warning Reason(s) | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #strFormStatus# | #CoachingReason# | #SubCoachingReason# | #CreatedDate# PDT | | | Values will be populated based on form options selected. FormId will be a link opening review3.aspx to view record. | N/A |
|  | | | | | | |
|  | | | | | | |

### eCoaching My Submitted Dashboard page (view3.aspx – secure)

This page shall be displayed if a user has been authenticated to access the vangent.local network (this includes ad.local users accessing servers on the vangent.local network) and are an authorized user per assumptions in section 2.2. Users who are not authenticated and authorized will be redirected to the page – error3.aspx.

A user will be authenticated upon entering eCoaching Log web site. Once a user has been authenticated, the user will not be authenticated again when the user tries to access the page. Authorization will be done only on page non post back.

| **Control Type** | **Format** | | **Text or Description** | **Field Content/Action** | **Field Length** |
| --- | --- | --- | --- | --- | --- |
| Image | BC-1 | | ajax-loader5.gif | Display the progress image when a database search is being processed to populate the dropdowns. | N/A |
| Header | A-1 | | “Welcome to the My Submitted Dashboard” | N/A | N/A |
|  | | | | | |
|  |  | |  |  |  |
|  |  | |  |  |  |
|  |  | |  |  |  |
| If user job code is one of the following (\*40, WTTR12, WTTI\*) then display the following | | | | | |
| Header | | A-1 | “My Submitted eCoaching Logs | N/A | N/A |
| Dropdown | | A-1 | [ddMGR] | Dropdown contains the list of Managers for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-1 | [ddSUP] | Dropdown contains the list of Supervisors for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-1 | [ddStatus] | Dropdown contains the list of Statuses for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-1 | [ddCSR] | Dropdown contains the list of Employees for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Table | | ABCD-2 | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | CSR Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubcoachingReason# | #value# | #CreatedDate# PDT | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
|  | | | | | |
| If user job code is one of the following (\*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL51 ) then display the following | | | | | |
| Header | | A-1 | “My Submitted eCoaching Logs | N/A | N/A |
| Dropdown | | A-1 | [ddMGR2] | Dropdown contains the list of Managers for the user’s eCoaching records. | N/A |
| Dropdown | | A-1 | [ddSUP2] | Dropdown contains the list of Supervisors for the user’s eCoaching records. | N/A |
| Dropdown | | A-1 | [ddStatus2] | Dropdown contains the list of Statuses for the user’s eCoaching records.  OnChange, generates report with selected values | N/A |
| Dropdown | | A-1 | [ddCSR2] | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Table | | ABCD-2 | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | CSR Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubcoachingReason# | #value# | #CreatedDate# PDT | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
|  | | | | | |
| If user does not reflect previous conditions and does not have a CSR’s job code who is not ARC then display the following | | | | | |
| Header | | A-1 | “My Submitted Pending eCoaching Logs | N/A | N/A |
| Text | | A-1 | Filter: | N/A | N/A |
| Dropdown | | A-1 | [ddMGR3] | Dropdown contains the list of Managers for the user’s eCoaching records. | N/A |
| Dropdown | | A-1 | [ddSUP3] | Dropdown contains the list of Supervisors for the user’s eCoaching records. | N/A |
| Dropdown | | A-1 | [ddEMP3] | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Table | | ABCD-2 | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | CSR Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
| Header | | A-3 | “My Submitted Completed eCoaching Logs | N/A | N/A |
| Text | | A-3 | Filter: | N/A | N/A |
| Dropdown | | A-3 | [ddMGR4] | Dropdown contains the list of Managers for the user’s eCoaching records. | N/A |
| Dropdown | | A-3 | [ddSUP4] | Dropdown contains the list of Supervisors for the user’s eCoaching records. | N/A |
| Dropdown | | A-3 | [ddEMP4] | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Table | | ABCD-3 | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | CSR Name | Supervisor Name | Manager Name | Status | Coaching Reason | Sub-coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #FormStatus# | #CoachingReason# | #SubCoachingReason# | #value# | #CreatedDate# PDT | | Values will be populated based on form options selected. FormId will be a link opening review.aspx to view record. | N/A |
|  | | | | | |

### eCoaching Dashboard Review page (review.aspx – secure)

This page shall be displayed if a user who has been authenticated to access the vangent.local (this includes ad.local users accessing servers on the vangent.local network) and are an authorized user per assumptions in section 2.2 selects a Form Id from the Main Dashboard (view2.aspx) or My Submitted Dashboard (view3.aspx) to be displayed. Users who are not authenticated and authorized will be redirected to the page – error3.aspx.

A user will be authenticated upon entering eCoaching Log web site. Once a user has been authenticated, the user will not be authenticated again when the user tries to access the page. Authorization will be done only on page non post back.

For low CSAT (low customer satisfaction) logs, hierarchy managers will be able to view the page. Only managers in the logs will be able to submit coaching related data.

The notes and date that the manager enters on this page will be saved in coaching\_log.MgrNotes and coaching\_log.MgrReviewManualDate respectively, the coaching\_log.MgrReviewAutoDate will be populated with the system date/time when the manager submits the review.

The notes and date that the supervisor enters on this page will be appended to coaching\_log.coachingNotes with the following format:

Existing coachingNotes

Supervisor Name + System Date/Time + Notes entered on this page by the Supervisor

Example:

Existing notes

Stearns, Douglas R (07/20/2015 03:02:11 PM PDT) – 07/01/2015 Supervisor Review Notes

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Control Type** | **Format** | **Text or Description** | **Field Content/Action** | **Field Length** |
| Text | ABC-1 | Please note that all fields are required. Double-check your work to ensure accuracy. | N/A | N/A |
| Text | A-1 | Coaching Reason(s): | N/A | N/A |
| If record status contains “Pending” then display the following: | | | | |
| If no Coaching Reasons exists then display the following: | | | | |
| Text | ABC-2 | No data was returned. | N/A | N/A |
|  | | | | |
| If Coaching Reasons exists then display the following repeatable row: | | | | |
| Text | ABC-2 | #CoachingReason# | If available display the coaching reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingSubReason# | If available display the coaching sub reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingReasonValue# | If available display the coaching reason value from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-8 | Details of the behavior being coached: | N/A | N/A |
| Text | ABC-8 | [txtDescription] | N/A | N/A |
| If user’s Employee ID matches Employee ID of Supervisor of hierarchy, AND | | | | |
|  | | | | |
| if isCoachingRequired = True or txtMgrNotes is not blank then display the following: | | | | |
| Text | ABC-8 | Notes from Manager: | N/A | N/A |
| Text | ABC-8 | [txtMgrNotes] | N/A | N/A |
|  | | | | |
|  | | | | |
| Display the following (Management Notes: [txtMgrNotes]) when one of the four conditions below is met as well as txtMgrNotes is not blank and “Notes from Manager” is not displayed.  **Condition 1.**  IF user’s Employee ID matches Employee ID of Supervisor of hierarchy,  ( IF the record status is “Pending Supervisor Review” (CSR, Training, and LSA modules) , Or  “Pending Manager Review” (Supervisor module) Or  “Pending Quality Lead Review” (Quality module)  IF the record is from IQS  END IF  END IF  )  OR  ( IF the record status is either “Pending Employee Review” or “Pending Acknowledgement”, Or  “Pending Manager Review” (CSR, Training modules), Or  “Pending Sr. Manager Review” (Supervisor module), Or  “Pending Deputy Program Manager Review” (Quality module)  END IF  )  END IF  **Condition 2.**  IF user’s Employee ID matches Employee ID of Manager of hierarchy,  IF the record status is  “Pending Employee Review”, or “Pending Acknowledgement” for all modules, Or  “Pending Supervisor Review” (CSR, Training, and LSA modules), Or  “Pending Manager Review” (Supervisor module), Or  “Pending Quality Lead Review “ (Quality module)  END IF  END IF  **Condition 3.**  IF user’s Employee ID matches Employee ID of the record’s Submitter,  but does NOT match Employee IDs of the employee of record (coaching\_log.EmpID), the employee’s Supervisor, and the employee’s Manager of hierarchy  END IF  **Condition 4.**  IF record is NOT a confirmed Customer Service Escalation  END IF | | | | |
|  | | | | |
| Text | ABC-8 | Management Notes: | N/A | N/A |
| Text | ABC-8 | [txtMgrNotes] | N/A | N/A |
| Always display Coaching Notes when the record is “Completed”.  When the record is “Pending”, display Coaching Notes if one of the four conditions below is met:  **Condition 1:**  When user is the supervisor of the record recipient (user emp ID matches supervisor emp ID in either log table or hierarchy table):  If the record is NOT from IQS, always display Coaching Notes;  Otherwise, display Coaching Notes if and only if the record status is either “Pending Supervisor Review” (CSR, Training, LSA) or “Pending Manager Review” (Supervisor) or “Pending Quality Lead Review” (Quality);    **Condition 2:**  When user is the manager of the record recipient (user emp ID matches manager emp ID in either log table or hierarchy table)   * 1. If the record status is either “Pending Manager Review” (CSR, Training) or “Pending Sr. Manager Review” (Supervisor) or “Pending Deputy Program Manager Review” (Quality), * Display Coaching Notes if the three coaching reasons (Current Coaching Initiative, OMR/Exceptions, Low CSAT(LCS)) are NOT required research and the Coaching Notes is not blank.   1. Otherwise, always display Coaching Notes.   **Condition 3:**  IF user is the submitter, but user is not the record recipient’s supervisor or manager.  **Condition 4:**  IF user is the record recipient. | | | | |
|  | | | | |
| Text | ABC-8 | Coaching Notes: | N/A | N/A |
| Text | ABC-8 | [txtCoachingNotes] | N/A | N/A |
|  | | | | |
|  | | | | |
|  | | | | |
| Display the following if one of the two conditions below is met:  **Condition 1:**  IF user’s Employee ID matches Employee ID of the employee of the record (coaching\_log.EmpID),   1. IF the record status is “Pending Employee Review” and the record is IQS or HFC or SEA (seasonal attendance) and supervisor has already signed, OR 2. If the record status is “Pending Employee Review” and the record is CTC and manager has already signed, OR 3. IF the record status is “Pending Acknowledgement   **Condition 2:**  IF user’s Employee ID matches Employee ID of Supervisor of hierarchy,   1. IF the record status is “Pending Acknowledgement”, OR 2. IF the record status is “Pending Supervisor Review” (CSR, Training, and LSA modules) or “Pending Manager Review” (Supervisor module) or “Pending Quality Lead Review” (Quality module)    1. IF the record is from IQS, and the employee has already signed (isCSRAcknowledged is true) | | | | |
|  | | | | |
|  | | | | |
| Text | ABC-9 | 1.Check the box below to acknowledge the monitor: | N/A | N/A |
|  |  |  |  |  |
| Checkbox | ABC-9 | [CheckBox1] | N/A | N/A |
| Text | ABC-9 | I have read and understand all the information provided on this eCoaching Log. | N/A | N/A |
| Text | ABC-9 | 2. Provide any comments or feedback below: | N/A | N/A |
| Text Box | ABC-9 | [txtAcknowledgeComments] | OnKeyUp use javascript to limit number of characters | N/A |
| Text | ABC-9 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-9 | [Provide as much detail as possible] | N/A | N/A |
| Display the following:  IF user’s Employee ID matches Employee ID of the employee of the record (i.e., the user is the employee that the record was opened for),   1. IF the record status is “Pending Employee Review” and the record is IQS and supervisor has already signed, OR 2. IF the record status is “Pending Acknowledgement | | | | |
| Button | ABC-10 | [Button6] | OnClick validates updates and submits data to EC.sp\_Update6Review\_Coaching\_Log;  Send CSR comments to supervisor/manager if the log is CSR log and is completed. | N/A |
|  | | | | |
| Display the following:  IF user’s Employee ID matches Employee ID of Supervisor of hierarchy,   1. IF the record status is “Pending Acknowledgement”, OR 2. IF the record status is “Pending Supervisor Review” (CSR, Training, and LSA modules) or “Pending Manager Review” (Supervisor module) or “Pending Quality Lead Review” (Quality module)    1. IF the record is from IQS, and the employee has already signed (isCSRAcknowledged is true) | | | | |
| Button | ABC-10 | [Button7] | OnClick validates updates and submits data to EC.sp\_Update7Review\_Coaching\_Log;  Send CSR comments to supervisor/manager if the log is CSR log and is completed. | N/A |
|  | | | | |
|  | | | | |
| IF user’s Employee ID matches Employee ID of Supervisor of hierarchy,   1. IF the record status is “Pending Supervisor Review” (CSR, Training, and LSA modules) or “Pending Manager Review” (Supervisor module) or “Pending Quality Lead Review” (Quality module), and the record is not ETS/OAE, ETS/OAS, OMR/IAE, OMR/IAT, Training/SDR, and Training/ODT | | | | |
| Text | ABC-9 | 1.Enter the date of coaching: | N/A | N/A |
| Text Box | ABC-9 | #Date1# | N/A | N/A |
| Image | ABC-9 | Calendar\_scheduleHS.png | OnClick opens calendar menu to update Date1 textbox | N/A |
| Text | ABC-9 | 2.Provide the details from the coaching session including action plans developed: | N/A | N/A |
| Text Box | ABC-9 | #TextBox5# | N/A | N/A |
| Text | ABC-10 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-10 | Provide as much detail as possible | N/A | N/A |
| Button | ABC-10 | [Button1] | OnClick validates updates and submits data to EC.sp\_Update1Review\_Coaching\_Log | N/A |
| If user level is manager and record status is “Pending Manager Review” and (“Current Coaching Initiative” = “Research Required” OR “OMR / Exceptions” = “Research Required”) and record is Low CSAT then display the following: | | | | |
| If record is Low CSAT then display the following: | | | | |
| Text | ABC-9 | You are receiving this eCL because you have been assigned to listen to and provide feedback on a call that was identified as having low customer satisfaction. Please review the call from a PPoM perspective and provide details on the specific opportunities requiring coaching in the record below. |  | N/A |
|  | | | | |
| If record is CCI or OMR then display the following: | | | | |
| Text | ABC-9 | You are receiving this eCL record because an Employee on your team was identified in an Outlier Management Report (OMR). Please research this item in accordance with the latest Contact Center Operations 46.0 Outlier Management Report (OMR): Outlier Research Process SOP and provide the details in the record below. | “Contact Center Operations 46.0 Outlier Management Report (OMR): Outlier Research Process SOP” opens new browser window to - https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx | N/A |
| If record is OMR ISQ (Short Call), then display the following | | | | |
| Text | ABC-9 | You are receiving this eCL because you have been assigned to listen to and provide feedback on calls that have been identified as having a short duration. Details of each call can be found within the Performance Report Catalog by clicking [here](https://cco.gdit.com/bi/ReportsCatalog/TQC_ShortCall/Forms/AllItems.aspx). Please review the calls and provide specific details on opportunities that requiring coaching. | On click “here”, open <https://cco.gdit.com/bi/ReportsCatalog/TQC_ShortCall/Forms/AllItems.aspx> in a new window. | N/A |
| If record is Training SDR (Short Duration Reporting), then display the following | | | | |
| Text | ABC-9 | CSRs are scheduled for specific times in Empower to ensure understanding of training materials presented. It is important to utilize the timeframe allotted to successfully understand the training content. Please be aware that the scheduled timeframe is a metric which has been agreed upon by CCO and CMS. You should use all or the majority of the scheduled time to review each eLearning module assigned. | N/A | N/A |
| If record is Training ODT (Overdue Training), then display the following | | | | |
| Text | ABC-9 | The above training is now overdue. Please have the training completed and provide coaching on the specific reasons it was overdue. | N/A | N/A |
| If record is OMR BRN or BRL (exceeding number of breaks or length of breaks) and Pending the employee’s immediate supervisor review, then display the following | | | | |
| Text | ABC-9 | You are receiving this eCL record because an Employee on your team was identified in a Break Outlier Report. Please review the ETS Breaks Outlier Report, the ETS entries, and refer to HCSD-POL-HR-MISC-08 Break Time Policy and Break Policy Reference guide for additional information and provide the details in the record below. | On click “ETS Breaks Outlier Report”, open https://cco.gdit.com/bi/ReportsCatalog/AvayaBreakPolicyReporting/Forms/AllItems.aspx | N/A |
| If record is PSC MSR (Performance Scorecard for CSR) and the user is a CSR and the user is the employee of this record or the user is the supervisor of the employee, then display the following text | | | | |
| Text | ABC-9 | To review your full details, please visit the CCO Performance Scorecard. If you have any questions, please see your supervisor. | On click “CCO Performance Scorecard”, open  <https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx> | N/A |
| If record is PSC MSRS (Performance Scorecard for Supervisor) and the user is a Supervisor and the user is the employee of this record or the user is the manager of the employee, then display the following text | | | | |
| Text | ABC-9 | To review your full details, please visit the CCO Performance Scorecard. If you have any questions, please submit an escalation via the CCO Performance Scorecard Information Station SharePoint site. | On click “CCO Performance Scorecard”, open  <https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx>;  On click “submit an escalation”, open  <https://cco.gdit.com/Reports/Performance_Scorecard/Lists/Scorecard_Escalated_Issues_Log/NewIssue.aspx>  On click “CCO Performance Scorecard Information Station”, open  <https://cco.gdit.com/Reports/Performance_Scorecard/default.aspx> | N/A |
|  |  |  |  |  |
| IF user’s Employee ID matches Employee ID of Supervisor of hierarchy, the record status is “Pending Supervisor Review” (CSR, Training, and LSA modules) or “Pending Manager Review” (Supervisor module) or “Pending Quality Lead Review” (Quality module), and the record is either ETS/OAE or ETS/OAS or OMR/IAE or OMR/IAT or Training/SDR or Training/ODT;  OR  For non Low CSAT - if user’s Employee ID matches Employee ID of Manager of hierarchy, and the record status is “Pending Manager Review”, and ( “Current Coaching Inititiative” = “Research Required” OR “OMR/Exception” = “Research Required”)  OR  For Low CSAT - if user’s Employee ID matches Employee ID of Manager of the log record (coaching\_log\_MgrID), and the record status is “Pending Manager Review”, and ( “Current Coaching Inititiative” = “Research Required” OR “OMR/Exception” = “Research Required”) | | | | |
| Text | ABC-9 | 1. Date: \* | N/A | N/A |
| Text Box | ABC-9 | [Date4] | N/A | N/A |
| Image | ABC-9 | Calendar\_scheduleHS.png | OnClick opens calendar menu to populate Date4. | N/A |
| Text | ABC-9 | 2. Based on your research does this record require coaching? | N/A | N/A |
| Radio Button | ABC-9 | [RadioButtonList3] (Yes) | On Click controls display of remaining questions on page. | N/A |
| Radio Button | ABC-10 | [RadioButtonLIst3] (No) | On Click controls display of remaining questions on page. | N/A |
| If RadioButtonList3.selected = “Yes” then display the following: | | | | |
| Text | ABC-10 | 3. Please provide reason / explanation / justification as to why the item is coachable for the Supervisor: \* | N/A | N/A |
| Text Box | ABC-10 | [AddlNotes] | OnKeyUp use javascript to limit number of characters | N/A |
| Text | ABC-10 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-11 | [These notes will only be viewed by Supervisors] | N/A | N/A |
|  | | | | |
| If RadioButtonList3.selected = “No” then display the following: | | | | |
| Text | ABC-10 | 3. What was the main reason this item was not coachable? | N/A | N/A |
| Dropdown Menu | ABC-10 | [DropDownList2] | Dropdown list contains the following for Break Time (break numbers and lengths):  Approved accommodation on file  Other  Dropdown list contains the following for OMR IAE:  Agent no longer employed or on LOA  Escalation was appropriate  ISG or Supervisor told agent to escalate  Not enough information to coach  Other  Dropdown list contains the following for all others:  Other | N/A |
| Text | ABC-10 | 4. Please provide reason /explanation / justification as to why the item was not coachable: \* | N/A | N/A |
| Text Box | ABC-10 | [TextBox1] | OnKeyUp use javascript to limit number of characters | N/A |
| Text | ABC-11 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-11 | [These notes will only be viewed by Supervisors] | N/A | N/A |
|  | | | | |
| Button | ABC-12 | [Button5] | OnClick validates updates and submits data to EC. sp\_Update5Review\_Coaching\_Log | N/A |
|  | | | | |
| If user level is manager and record status is “Pending Manager Review” and “Current Coaching Initiative” <> “Research Required” and “OMR / Exceptions” <> “Research Required” then display the following: | | | | |
| Text | ABC-8 | Review the submitted coaching opportunity and (1) determine if it is a confirmed Customer Service Escalation (CSE). If it is a CSE, setup a meeting with the Employee and Supervisor and report your coaching in the box below. If it not a CSE, enter notes for the Supervisor to use to coach the Employee. | N/A | N/A |
| Text | ABC-8 | 1. Is the coaching opportunity a confirmed Customer Service Escalation (CSE)? \* | N/A | N/A |
| Radio Button | ABC-8 | [RadioButtonList1] (Yes, this is a confirmed Customer Service Escalation.) | OnClick controls display of remaining questions on page | N/A |
| Radio Button | ABC-8 | [RadioButtonList1] (No, this is not a confirmed Customer Service Escalation) | OnClick controls display of remaining questions on page | N/A |
| If RadioButtonList1.selected = “Yes” then display the following: | | | | |
| Text | ABC-9 | 2. Enter the date coached: \* | N/A | N/A |
| Text Box | ABC-9 | [Date2] | N/A | N/A |
| Image | ABC-9 | Calendar\_scheduleHS.png | OnClick opens calendar menu to populate Date2. | N/A |
| Text | ABC-9 | 3. Provide the details from the coaching session including action plans developed: \* | N/A | N/A |
| Tex Box | ABC-10 | [TextBox2] | OnKeyUp use javascript to limit number of characters | N/A |
| Text | ABC-10 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-10 | [Provide as much detail as possible] | N/A | N/A |
|  | | | | |
| If RadioButtonList1.selected = “No” then display the following: | | | | |
| Text | ABC-9 | 2. Enter the date reviewed: \* | N/A | N/A |
| Text Box | ABC-9 | [Date3] | N/A | N/A |
| Image | ABC-9 | Calendar\_scheduleHS.png | OnClick opens calendar menu to populate Date3. | N/A |
| Text | ABC-9 | 3. Provide explanation for Employee and Supervisor as to reason why this is not a CSE: \* | N/A | N/A |
| Tex Box | ABC-10 | [TextBox3] | OnKeyUp use javascript to limit number of characters | N/A |
| Text | ABC-10 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-10 | [Provide as much detail as possible] | N/A | N/A |
|  | | | | |
| Button | ABC-11 | [Button3] | OnClick validates updates and submits data to EC.sp\_Update3Review\_Coaching\_Log | N/A |
|  | | | | |
| IF user’s Employee ID is the Employee ID of the Employee of the record, the record status is “Pending Employee Review”, and it is not IQS and not CTC | | | | |
| Text | ABC-8 | 1. Check the box below to acknowledge the coaching opportunity: \* | N/A | N/A |
| Checkbox | ABC-8 | [CheckBox2] | N/A | N/A |
| Text | ABC-8 | I have read and understand all the information provided on this eCoaching Log. | N/A | N/A |
| Text | ABC-8 | 2. Provide any comments or feedback below: | N/A | N/A |
| Text Box | ABC-8 | [TextBox4] | OnKeyUp use javascript to limit number of characters | N/A |
| Text | ABC-8 | [max length: 3,000 chars] | N/A | N/A |
| Text | ABC-8 | [Provide as much detail as possible] | N/A | N/A |
| Button | ABC-8 | [Button4] | OnClick validates updates and submits data to EC. sp\_Update4Review\_Coaching\_Log;  Send CSR comments to supervisor/manager if the log is CSR log and is completed. | N/A |
|  | | | | |
|  | | | | |
| If record status is “Completed” then display the following: | | | | |
| If no Coaching Reasons exists then display the following: | | | | |
| Text | ABC-2 | No data was returned. | N/A | N/A |
|  | | | | |
| If Coaching Reasons exists then display the following repeatable row: | | | | |
| Text | ABC-4 | #CoachingReason# | If available display the coaching reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingSubReason# | If available display the coaching sub reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingReasonValue# | If available display the coaching reason value from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
|  | | | | |
| Text | ABC-8 | Details of the behavior being coached: | N/A | N/A |
| Text | ABC-8 | [txtDescription] | N/A | N/A |
| If strCoachReason\_CSE = “Opportunity” then display the following | | | | |
| If isCSE = “True” then display the following | | | | |
| Text | ABC-9 | Coaching Opportunity was a confirmed Customer Service Escalation | N/A | N/A |
|  | | | | |
| If isCSE <> “True” then display the following: | | | | |
| If txtMgrNotes is not blank then display the following: | | | | |
| Text | ABC-9 | Management Notes: | N/A | N/A |
| Text | ABC-9 | [txtMgrNotes] | N/A | N/A |
|  | | | | |
| Text | ABC-9 | Coaching Opportunity was not a confirmed Customer Service Escalation | N/A | N/A |
|  | | | | |
| Text | ABC-10 | Coaching Notes: | N/A | N/A |
| Text | ABC-10 | [txtCoachingNotes] | N/A | N/A |
| If record source <> “IQS” and the record source <> “CTC” then display the following | | | | |
| Text | ABC-10 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-11 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-11 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Employee Comments/Feedback: | N/A | N/A |
| Text | ABC-12 | [txtCSRComments] | N/A | N/A |
|  | | | | |
| If record source is IQS or HFC or SEA (seasonal attendance) then display the following | | | | |
| Text | ABC-10 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-11 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-11 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Employee Comments/Feedback: | N/A | N/A |
| Text | ABC-12 | [txtCSRComments] | N/A | N/A |
| Text | ABC-10 | Supervisor Review Information: | N/A | N/A |
| Text | ABC-11 | [strReviewer] | N/A | N/A |
| Text | ABC-11 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-11 | [SupReviewedAutoDate] | N/A | N/A |
|  | | | | |
| If record source = “CTC” then display the following | | | | |
| Text | ABC-10 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-11 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-11 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Employee Comments/Feedback: | N/A | N/A |
| Text | ABC-12 | [txtCSRComments] | N/A | N/A |
| Text | ABC-10 | Manager Review Information: | N/A | N/A |
| Text | ABC-11 | [strReviewer] | N/A | N/A |
| Text | ABC-11 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-11 | [MgrReviewAutoDate] | N/A | N/A |
|  | | | | |
| Text | D-1 | Page: | N/A | N/A |
| Text | D-1 | [strFormStatus] | If strFormStatus = “Completed” then display “Final”  If strFormStatus contains “Pending” then display “Review” | N/A |
| Text | D-1 | FormID: | N/A | N/A |
| Text | D-1 | [strFormID] | N/A | N/A |
| Text | D-1 | Status: | N/A | N/A |
| Text | D-1 | [strFormStatus] | N/A | N/A |
| Text | D-1 | Date Submitted: | N/A | N/A |
| Text | D-1 | [SubmittedDate] | N/A | N/A |
| Text | D-1 | Type: | N/A | N/A |
| Text | D-1 | [strFormType] | N/A | N/A |
| If strFormType <> “Direct” then display the following: | | | | |
| Text | D-1 | Date of Event: | N/A | N/A |
| Text | D-1 | [EventDate] | N/A | N/A |
|  | | | | |
| If strFormType = “Direct” then display the following: | | | | |
| Text | D-1 | Date of Coaching: | N/A | N/A |
| Text | D-1 | [CoachingDate] | N/A | N/A |
|  | | | | |
| Text | D-1 | Source: | N/A | N/A |
| Text | D-1 | [strSource] | N/A | N/A |
| Text | D-1 | Site: | N/A | N/A |
| Text | D-1 | [strCSRSite] | N/A | N/A |
| If isVerintMonitor <> “False” then display the following: | | | | |
| Text | D-1 | Verint ID: | N/A | N/A |
| Text | D-1 | [strVerintID] | N/A | N/A |
| Text | D-1 | Scorecard Name: | N/A | N/A |
| Text | D-1 | [VerintFormName] | N/A | N/A |
| Label | D-1 | Coaching Monitor: | N/A | N/A |
| Label | D-1 | N/A | N/A | N/A |
|  | | | | |
| If isBehaviorAnalyticsMonitor <> “False” then display the following: | | | | |
| Text | D-1 | Avoke: | N/A | N/A |
| Text | D-1 | [strBehaviorAnalyticsID] | N/A | N/A |
|  | | | | |
|  | | | | |
| If isNGDActivityID <> “False” then display the following: | | | | |
| Text | D-1 | NGD Activity ID: | N/A | N/A |
| Text | D-1 | [strNGDActivityID] | N/A | N/A |
|  | | | | |
| If isUCID <> “False” then display the following: | | | | |
| Text | D-1 | Universal Call ID: | N/A | N/A |
| Text | D-1 | [strUCID] | N/A | N/A |
|  | | | | |
| Text | D-1 | Employee: | N/A | N/A |
| Text | D-1 | [strCSRName] | N/A | N/A |
| Text | D-1 | Supervisor: | N/A | N/A |
| Text | D-1 | [strCSRSupName] | N/A | N/A |
| Text | D-1 | Manager: | N/A | N/A |
| Text | D-1 | [strCSRMgrName] | N/A | N/A |
| Text | D-1 | Submitter: | N/A | N/A |
| Text | D-1 | [strSubmitterName] | N/A | N/A |

### eCoaching Historical Dashboard page (view4.aspx – secure)

This page shall be displayed if a user has been authenticated to access the vangent.local network (this includes ad.local users accessing servers on the vangent.local network) and are an authorized user per assumptions in section 2.2. Users who are not authenticated and authorized will be redirected to the page – error3.aspx

A user will be authenticated upon entering eCoaching Log web site. Once a user has been authenticated, the user will not be authenticated again when the user tries to access the page. Authorization will be done only on page non post back.

Custom Paging will be implemented by retrieving only those records from database that must be displayed for the particular page of data requested by the user (based on the current search criteria).

| **Control Type** | **Format** | | **Text or Description** | **Field Content/Action** | **Field Length** |
| --- | --- | --- | --- | --- | --- |
| Modal Dialog | BC-1 | | Please wait while we process your request | Display a modal dialog when a database search is being processed to block UI. | N/A |
| Header | A-1 | | “Welcome to the Historical Reporting Dashboard” | N/A | N/A |
| Header | A-1 | | “eCoaching Logs” | N/A | N/A |
| Text | | A-2 | Filter | N/A | N/A |
| Dropdown | | A-2 | [ddSite] | Dropdown contains the list of sites for the user’s eCoaching records.  OnChange refresh report data based on selected filter option | N/A |
| Dropdown | | A-2 | [ddCSR] | Dropdown contains the list of Employees for the user’s eCoaching records. | N/A |
| Dropdown | | A-2 | [ddSUP] | Dropdown contains the list of Supervisors for the user’s eCoaching records. | N/A |
| Dropdown | | A-2 | [ddMGR] | Dropdown contains the list of MGRs for the user’s eCoaching records. | N/A |
| Dropdown | | A-2 | [ddSubmitter] | Dropdown contains the list of Submitters for the user’s eCoaching records. | N/A |
| Dropdown | | A-2 | [ddStatus] | Dropdown contains the list of statuses for the user’s eCoaching records. | N/A |
| Dropdown | | A-2 | [ddSource] | Dropdown contains the list of sources for the user’s eCoaching records. | N/A |
|  | |  |  |  |  |
| Dropdown | | A-2 | [ddValue] | Dropdown contains the list of values for the user’s eCoaching records. | N/A |
| Text | | ABCD-2 | Submitted: | N/A | N/A |
| Text Box | | ABCD-2 | [Date1] | N/A | N/A |
| Image | | ABCD-2 | Calendar\_scheduleHS.png | OnClick opens calendar menu to open Date1 | N/A |
| Text Box | | ABCD-2 | [Date2] | N/A | N/A |
| Image | | ABCD-2 | Calendar\_scheduleHS.png | OnClick opens calendar menu to open Date2 | N/A |
| Button | | ABCD-2 | [Button1] | OnClick reloads report based on selected menu options | N/A |
| “Export to Excel” button will be disabled for users who are supervisors (job code ends with “40”) | | | | | |
| Button | | ABCD-2 | Export To Excel | OnClick generates excel file (.xlsx) based on selected dropdown options by calling stored procedure sp\_SelectFrom\_Coaching\_Log\_Historical\_Export.  Upon completion, a popup download dialog displays allowing the user to either Open or Save the file. | N/A |
|  | |  |  |  |  |
| Table | | ABCD-3 | |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | # | FormID | CSR Name | Supervisor Name | Manager Name | Submitter Name | Source | Status | Coaching Reason | Sub-Coaching Reason | Value | Created Date | | #Index# | #FormId# | #CSRName# | #SuperivsorName# | #ManagerName# | #SubmitterName# | #strSource# | #FormStatus# | #CoachinReason# | #Sub-coachingReason# | #Value# | #CreatedDate# PDT | | Values will be populated based on form options selected. FormId will be a link opening review2.aspx to view record.  Display image - 1324418219\_new.png next to strFormID if submitdate is current date  Display text “New!” next to strFormID if submitdate is current date | N/A |
| If no records to display then display: | | | | | |
| Text | ABC-4 | | There are no pending items to display. | N/A | N/A |
|  |  | |  |  |  |

### eCoaching Historical Dashboard Review page (review2.aspx – secure)

This page shall be displayed if a user who has been authenticated to access the vangent.local network (this includes ad.local users accessing servers on the vangent.local network) and are an authorized user per assumptions in section 2.2 selects a Form Id from the Historical Dashboard (view4.aspx) to be displayed. Users who are not authenticated and authorized will be redirected to the page – error3.aspx.

A user will be authenticated upon entering eCoaching Log web site. Once a user has been authenticated, the user will not be authenticated again when the user tries to access the page. Authorization will be done only on page non post back.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Control Type** | **Format** | **Text or Description** | **Field Content/Action** | **Field Length** |
| Text | ABC-1 | Please note that all fields are required. Double-check your work to ensure accuracy. | N/A | N/A |
| Text | ABC-1 | Coaching Reason(s): | N/A | N/A |
| If no Coaching Reasons exists then display the following: | | | | |
| Text | ABC-2 | No data was returned. | N/A | N/A |
|  | | | | |
| If Coaching Reasons exists then display the following repeatable row: | | | | |
| Text | ABC-3 | #CoachingReason# | If available display the coaching reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingSubReason# | If available display the coaching sub reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingReasonValue# | If available display the coaching reason value from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-8 | Details of the behavior being coached: | N/A | N/A |
| Text | ABC-8 | [txtDescription] | N/A | N/A |
| If strCoachReason\_CSE = “Opportunity” then display the following | | | | |
| If isCSE = “True” then display the following | | | | |
| Text | ABC-8 | Coaching Opportunity was a confirmed Customer Service Escalation | N/A | N/A |
|  | | | | |
| If isCSE <> “True” then display the following: | | | | |
| Text | ABC-8 | Management Notes: | N/A | N/A |
| Text | ABC-9 | [txtMgrNotes] | N/A | N/A |
| Text | ABC-9 | Coaching Opportunity was not a confirmed Customer Service Escalation | N/A | N/A |
|  | | | | |
| if txtMgrNotes is not blank then display the following: | | | | |
| Text | ABC-10 | Management Notes: | N/A | N/A |
| Text | ABC-10 | [txtMgrNotes] | N/A | N/A |
|  | | | | |
| Text | ABC-10 | Coaching Notes: | N/A | N/A |
| Text | ABC-11 | [txtCoachingNotes] | N/A | N/A |
| If record source <> “IQS” and record source <> “CTC” then display the following | | | | |
| Text | ABC-11 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-12 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-12 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Employee Comments/Feedback: | N/A | N/A |
| Text | ABC-13 | [txtCSRComments] | N/A | N/A |
|  | | | | |
| If record source = “IQS” or record source = “HFC”then display the following | | | | |
| Text | ABC-11 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-12 | Reviewed and acknowledged Quality Monitor on | N/A | N/A |
| Text | ABC-12 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Supervisor Review Information: | N/A | N/A |
| Text | ABC-12 | [strReviewer] | N/A | N/A |
| Text | ABC-13 | Reviewed and acknowledged Quality Monitor on | N/A | N/A |
| Text | ABC-13 | [SupReviewedAutoDate] | N/A | N/A |
|  | | | | |
|  | | | | |
| Text | D-1 | Page: | N/A | N/A |
| Text | D-1 | [strFormStatus] | If strFormStatus = “Completed” then display “Final”  If strFormStatus contains “Pending” then display “Review” | N/A |
| Text | D-1 | FormID: | N/A | N/A |
| Text | D-1 | [strFormID] | N/A | N/A |
| Text | D-1 | Status: | N/A | N/A |
| Text | D-1 | [strFormStatus] | N/A | N/A |
| Text | D-1 | Date Submitted: | N/A | N/A |
| Text | D-1 | [SubmittedDate] | N/A | N/A |
| Text | D-1 | Type: | N/A | N/A |
| Text | D-1 | [strFormType] | N/A | N/A |
| If strFormType <> “Direct” then display the following: | | | | |
| Text | D-1 | Date of Event: | N/A | N/A |
| Text | D-1 | [EventDate] | N/A | N/A |
|  | | | | |
| If strFormType = “Direct” then display the following: | | | | |
| Text | D-1 | Date of Coaching: | N/A | N/A |
| Text | D-1 | [CoachingDate] | N/A | N/A |
|  | | | | |
| Text | D-1 | Source: | N/A | N/A |
| Text | D-1 | [strSource] | N/A | N/A |
| Text | D-1 | Site: | N/A | N/A |
| Text | D-1 | [strCSRSite] | N/A | N/A |
| If isVerintMonitor <> “False” then display the following: | | | | |
| Text | D-1 | Verint ID: | N/A | N/A |
| Text | D-1 | [strVerintID] | N/A | N/A |
| Text | D-1 | Scorecard Name: | N/A | N/A |
| Text | D-1 | [VerintFormName] | N/A | N/A |
| Label | D-1 | Coaching Monitor: | N/A | N/A |
| Label | D-1 | N/A | N/A | N/A |
|  | | | | |
| If isBehaviorAnalyticsMonitor <> “False” then display the following: | | | | |
| Text | D-1 | Avoke ID: | N/A | N/A |
| Text | D-1 | [strBehaviorAnalyticsID] | N/A | N/A |
|  | | | | |
|  | | | | |
| If isNGDActivityID <> “False” then display the following: | | | | |
| Text | D-1 | NGD Activity ID: | N/A | N/A |
| Text | D-1 | [strNGDActivityID] | N/A | N/A |
|  | | | | |
| If isUCID <> “False” then display the following: | | | | |
| Text | D-1 | Universal Call ID: | N/A | N/A |
| Text | D-1 | [strUCID] | N/A | N/A |
|  | | | | |
| Text | D-1 | Employee: | N/A | N/A |
| Text | D-1 | [strCSRName] | N/A | N/A |
| Text | D-1 | Supervisor: | N/A | N/A |
| Text | D-1 | [strCSRSupName] | N/A | N/A |
| Text | D-1 | Manager: | N/A | N/A |
| Text | D-1 | [strCSRMgrName] | N/A | N/A |
| Text | D-1 | Submitter: | N/A | N/A |
| Text | D-1 | [strSubmitterName] | N/A | N/A |
|  | | | | |
| If no Coaching Reasons exists then display the following: | | | | |
| Text | ABC-3 | No data was returned. | N/A | N/A |
|  | | | | |
| If no Coaching Reasons exists then display the following: | | | | |
| Text | ABC-3 | #CoachingReason# | If available display the coaching reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingSubReason# | If available display the coaching sub reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-4 | #CoachingReasonValue# | If available display the coaching reason value from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-8 | Details of the behavior being coached: | N/A | N/A |
| Text | ABC-8 | [txtDescription] | N/A | N/A |
| If strCoachReason\_CSE = “Opportunity” then display the following | | | | |
| If isCSE = “True” then display the following | | | | |
| Text | ABC-8 | Coaching Opportunity was a confirmed Customer Service Escalation | N/A | N/A |
|  | | | | |
| If isCSE <> “True” then display the following: | | | | |
| Text | ABC-8 | Management Notes: | N/A | N/A |
| Text | ABC-9 | [txtMgrNotes] | N/A | N/A |
| Text | ABC-9 | Coaching Opportunity was not a confirmed Customer Service Escalation | N/A | N/A |
|  | | | | |
| if itxtMgrNotes is not blank then display the following: | | | | |
| Text | ABC-9 | Management Notes: | N/A | N/A |
| Text | ABC-10 | [txtMgrNotes] | N/A | N/A |
|  | | | | |
| Text | ABC-10 | Coaching Notes: | N/A | N/A |
| Text | ABC-10 | [txtCoachingNotes] | N/A | N/A |
| If record source <> “IQS” and record source <> “CTC” then display the following | | | | |
| Text | ABC-11 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-11 | Reviewed and acknowledged coaching on | N/A | N/A |
| Text | ABC-12 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Employee Comments/Feedback: | N/A | N/A |
| Text | ABC-12 | [txtCSRComments] | N/A | N/A |
|  | | | | |
| If record source = “IQS” or record source = “HFC” then display the following | | | | |
| Text | ABC-11 | Employee Review Information: | N/A | N/A |
| Text | ABC-11 | [strCSRName] | N/A | N/A |
| Text | ABC-12 | Reviewed and acknowledged Quality Monitor on | N/A | N/A |
| Text | ABC-12 | [CSRReviewAutoDate] | N/A | N/A |
| Text | ABC-12 | Supervisor Review Information: | N/A | N/A |
| Text | ABC-12 | [strCSRSupName] | N/A | N/A |
| Text | ABC-13 | Reviewed and acknowledged Quality Monitor on | N/A | N/A |
| Text | ABC-13 | [SupReviewedAutoDate] | N/A | N/A |
|  | | | | |

### eCoaching Historical Dashboard Review page (review3.aspx – secure)

This page shall be displayed if a user who has been authenticated to access the vangent.local network (this includes ad.local users accessing servers on the vangent.local network) and are an authorized user per assumptions in section 2.2 selects a Form Id from a Warning record on the Main Dashboard (view2.aspx) to be displayed. Users who are not authenticated and authorized will be redirected to the page – error3.aspx.

A user will be authenticated upon entering eCoaching Log web site. Once a user has been authenticated, the user will not be authenticated again when the user tries to access the page. Authorization will be done when a user enters the page for the first time.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Control Type** | **Format** | **Text or Description** | **Field Content/Action** | **Field Length** |
| Text | ABC-1 | Please note that all fields are required. Double-check your work to ensure accuracy. | N/A | N/A |
| Text | ABC-1 | Coaching Reason(s): | N/A | N/A |
| If no Coaching Reasons exists then display the following: | | | | |
| Text | ABC-2 | No data was returned. | N/A | N/A |
|  | | | | |
| If Coaching Reasons exists then display the following repeatable row: | | | | |
| Text | ABC-3 | #CoachingReason# | If available display the coaching reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingSubReason# | If available display the coaching sub reason from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
| Text | ABC-3 | #CoachingReasonValue# | If available display the coaching reason value from the database in the #DBValue#.  The information is to be displayed encased in a box. | N/A |
|  | | | | |
| Display the below on left side of screen | | | | |
| Text | D-1 | Page: | N/A | N/A |
| Text | D-1 | [strFormStatus] | If strFormStatus = “Completed” then display “Final”  If strFormStatus contains “Pending” then display “Review” | N/A |
| Text | D-1 | FormID: | N/A | N/A |
| Text | D-1 | [strFormID] | N/A | N/A |
| Text | D-1 | Status: | N/A | N/A |
| Text | D-1 | [strFormStatus] | N/A | N/A |
| Text | D-1 | Date Submitted: | N/A | N/A |
| Text | D-1 | [SubmittedDate] | N/A | N/A |
| Text | D-1 | Type: | N/A | N/A |
| Text | D-1 | [strFormType] | N/A | N/A |
| Text | D-1 | Date the warning was issued: | N/A | N/A |
| Text | D-1 | [EventDate] | N/A | N/A |
| Text | D-1 | Source: | N/A | N/A |
| Text | D-1 | [strSource] | N/A | N/A |
| Text | D-1 | Site: | N/A | N/A |
| Text | D-1 | [strCSRSite] | N/A | N/A |
| Text | D-1 | Employee: | N/A | N/A |
| Text | D-1 | [strCSRName] | N/A | N/A |
| Text | D-1 | Supervisor: | N/A | N/A |
| Text | D-1 | [strCSRSupName] | N/A | N/A |
| Text | D-1 | Manager: | N/A | N/A |
| Text | D-1 | [strCSRMgrName] | N/A | N/A |
| Text | D-1 | Submitter: | N/A | N/A |
| Text | D-1 | [strSubmitterName] | N/A | N/A |
|  | | | | |