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Detail Design: CCO eCoaching Log – My Dashboard

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Prepared by: Lili Huang Date: 06/15/2018

Department: FCD

Change History Log

| Date | Change Description | Author |
| --- | --- | --- |
| 06/15/2018 | Initial Revision – TFS 11388 | Lili Huang |
| 07/05/2018 | Updated per review:  Replaced “Other” role with “Employee” role | Lili Huang |
| 08/21/2018 | TFS11776 – Limit the number of records which can be exported to excel;  Added 4.20 and 4.21;  Updated 2. Business Logic | Lili Huang |
| 08/31/2018 | TFS11984 – Include a link to ecl sharepoint site to report issues;  Updated 3.1.4 Web Page Invoked Events | Lili Huang |
| 09/04/2018 | TFS11984 - Include a link to ecl sharepoint site to report issues;  Moved the change to Common DD. | Lili Huang |
| 09/04/2019 | TFS 14679 – Follow-up Process | Lili Huang |
| 09/18/2019 | TFS 15653 – Display logs in Pending Pending Follow-up status on CSRs Dashboard | Lili Huang |

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1. **Description**

This module allows authorized users to search individual or team ecoaching logs. It also allows users to view their submitted logs.

Authorized users are designated as CCO employees and classified as the following roles:

* Director
* Senior Manager
* Manager
* Supervisor
* Restricted
* ARC
* CSR
* Employee

Authorized users enter My Dashboard page by clicking “My Dashboard” on the top menu bar.

1. **Business Logic – MyDashboardController.cs**

User enters My Dashboard page:

* Get data for Pending Log bar chart based on user role;

**Director:**

A list of sites managed by the user with each site having the following status and count for the selected month:

* Pending Acknowledgement
* Pending Employee Review
* Pending Manager Review
* Pending Supervisor Review
* Pending Sr. Manager Review
* Pending Quality Lead Review
* Pending Deputy Program Manager Review
* Active Warnings

**Senior Manager, Manager:**

A list of the following status and count:

* Pending Acknowledgement
* Pending Employee Review
* Pending Manager Review
* Pending Sr. Manager Review
* Pending Deputy Program Manager Review

**Supervisor:**

A list of the following status and count:

* Pending Acknowledgement
* Pending Employee Review
* Pending Supervisor Review
* Pending Quality Lead Review
* Pending Follow-up (for CSR Supervisor)

**ARC, CSR, Employee:**

A list of the following status and count:

* Pending Acknowledgement
* Pending Employee Review
* Get log type list with associated counts based on user role;

**Director:**

A list of site managed by the user with each site having the following counts for the selected month, with each site displayed as a hyperlink:

* Pending
* Completed
* Warning

**Senior Manager, Manager:**

A list of the following logs and counts:

* My Pending
* My Completed
* My Team’s Pending
* My Team’s Completed
* My Team’s Warning
* My Submitted

**Supervisor:**

A list of the following logs and counts:

* My Pending
* My Completed
* My Team’s Pending
* My Team’s Completed
* My Team’s Warning
* My Submitted

**ARC, Employee:**

A list of the following logs and counts:

* My Pending
* My Completed
* My Submitted

**CSR:**

A list of the following logs and counts:

* My Pending
* My Follow-up
* My Completed
* Display log summary - Pending log bar chart; log type list with their associated counts and view links.

Click View link:

* Get data to populate search dropdowns of the selected log type based on user role;

**Director:**

Export to Excel link

Radio buttons, default to “Pending”:

* Pending
* Completed
* Warning

**Senior Manager, Manager:**

* My Pending eCoaching Logs:
* Supervisor
* Employee
* My Team’s Pending eCoaching Logs:
* Supervisor
* Employee
* Source
* My Team’s Completed eCoaching Logs:
* Supervisor
* Employee
* Source
* Submitted Start/End Dates
* My Completed eCoaching Logs:

None

* My Team’s Warning eCoaching Logs:
* Status
* Submitted Start/End Dates
* My Submitted eCoaching Logs:
* Manager
* Supervisor
* Employee
* Status
* Submitted Start/End Dates

**Supervisor:**

* My Pending eCoaching Logs:

None

* My Team’s Pending eCoaching Logs:
* Employee
* Source
* My Team’s Completed eCoaching Logs:
* Manager
* Employee
* Source
* Submitted Start/End Dates
* My Completed eCoaching Logs:

None

* My Team’s Warning eCoaching Logs:
* Status
* Submitted Start/End Dates
* My Submitted eCoaching Logs:
* Manager
* Supervisor
* Employee
* Status
* Submitted Start/End Dates

**ARC, Employee:**

* My Pending eCoaching Logs:

None

* My Completed eCoaching Logs:

None

* My Submitted eCoaching Logs:
* Manager
* Supervisor
* Employee
* Status
* Submitted Start/End Dates

**CSR:**

* My Pending eCoaching Logs:

None

* My Follow-up eCoaching Logs:

None

* My Completed eCoaching Logs:

None

* Default dropdowns to All if applicable;
* Default End date to today, Start date to 30 days before today if applicable;
* Get log list from database
* Display the selected log type list section with search dropdowns and log list; Display log name as a hyperlink.

Click Export to Excel link:

* Call stored procedure to get the total number of records to be exported;
* If the total number of records is over 20,000,

Display message “The maximum number of records that can be exported at a time is 20,000. You are trying to export [total number of records to be exported] records. Please refine your filters and try again.”

Else

Call stored procedure to get the log list, which will be written in an excel file. The naming convention for the excel file will be “eCoachingLog\_yyyyMMddHHmmssffff.xlsx”.

Click Go button:

* Call stored procedure to get log list based on the search criteria;
* Refresh the selected log type list section with the log list returned.

Click [Log Name] link:

* Redirect to ReviewController to display the selected log details in a modal dialog. See ReviewController for details.

1. **Page details**
   1. Views\MyDashboard\\_Default.cshtml, \_DefaultDirector.cshtml
      1. Razor pages comprising Web Page

\_CountByStatus.cshtml

\_CountBySite.cshtml

\_MyCompleted.cshtml

\_MyCompletedSearch.cshtml

\_MyPending.cshtml

\_MyPendingMgrSearch.cshtml

\_MySiteLogs.cshtml

\_MySiteLogSearch.cshtml

\_MySubmission.cshtml

\_MySubmissionSearch.cshtml

\_MyTeamCompleted.cshtml

\_MyTeamCompletedSearch.cshtml

\_MyTeamPending.cshtml

\_MyTeamPendingMgrSearch.cshtml

\_MyTeamPendingSupSearch.cshtml

\_MyTeamWarning.cshtml

\_MyTeamWarningSearch.cshtml

\_WarningList.cshtml

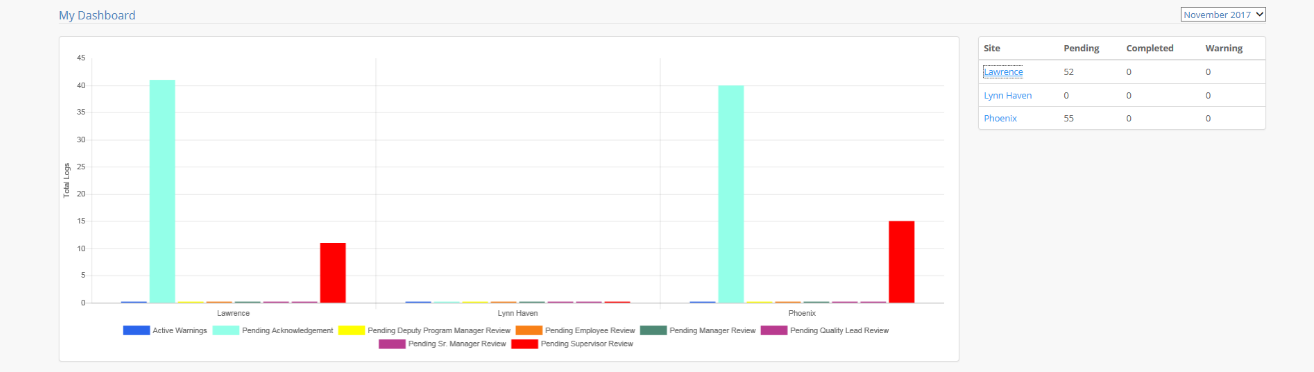
\_LogList.cshtml

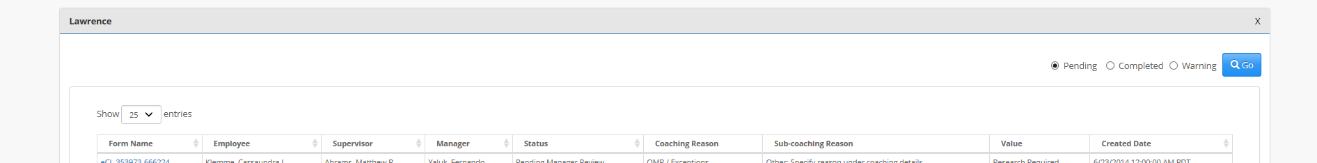
* + 1. Layout Page

Views\Shared\\_Layoutcshtml

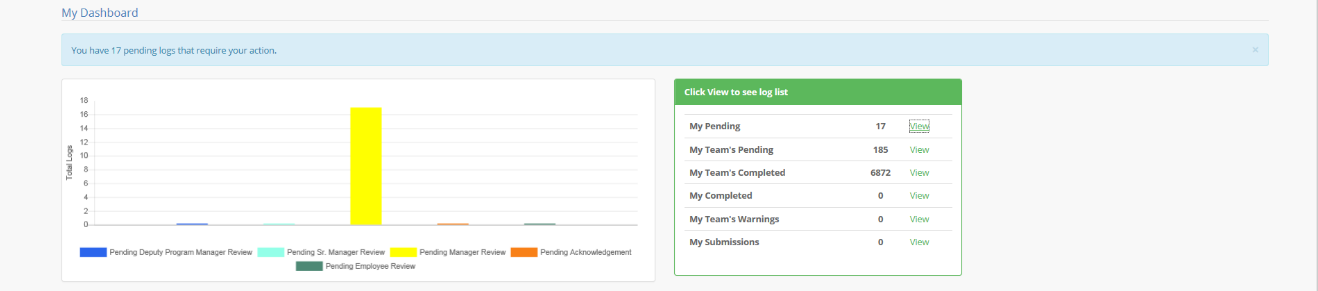
* + 1. Screenshot

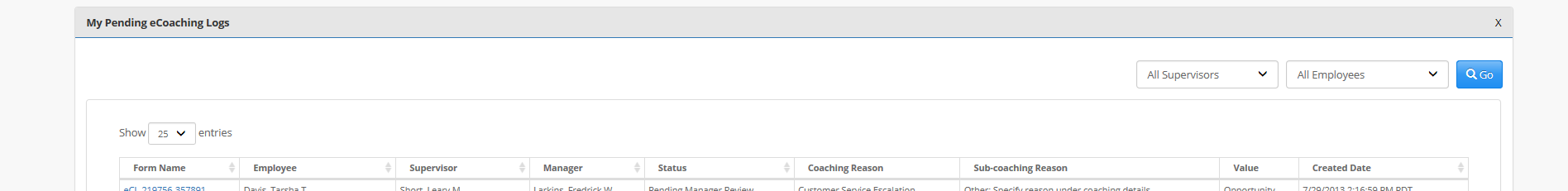
**Director:**

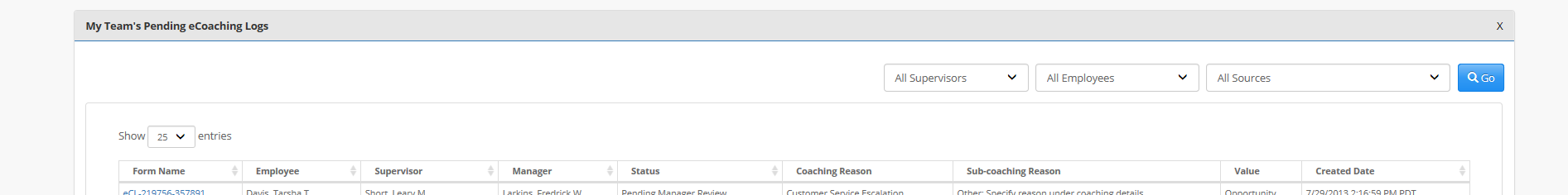


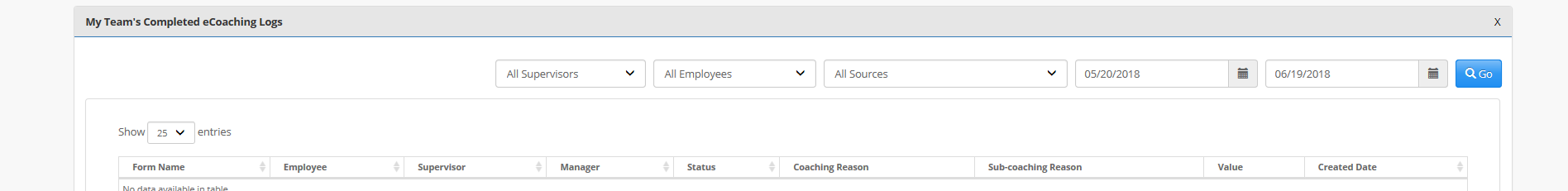


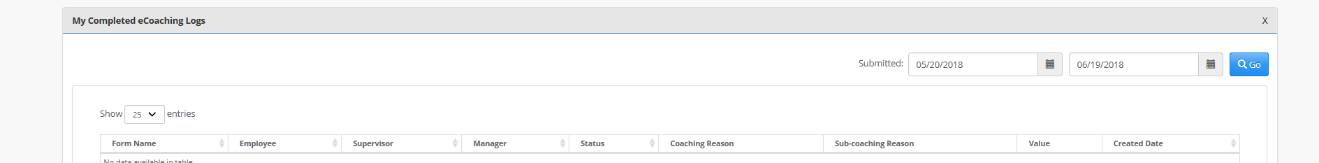
**Senior Manager, Manager:**

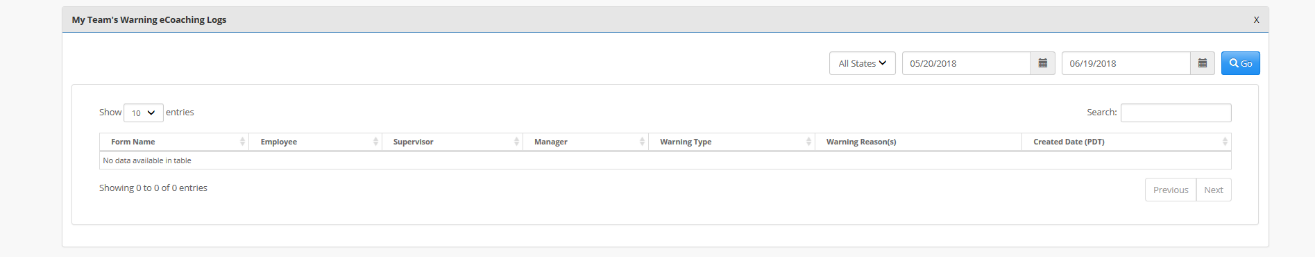


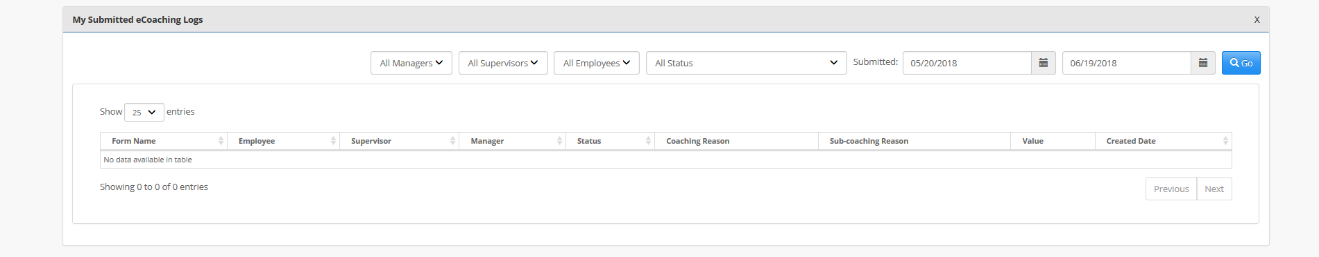




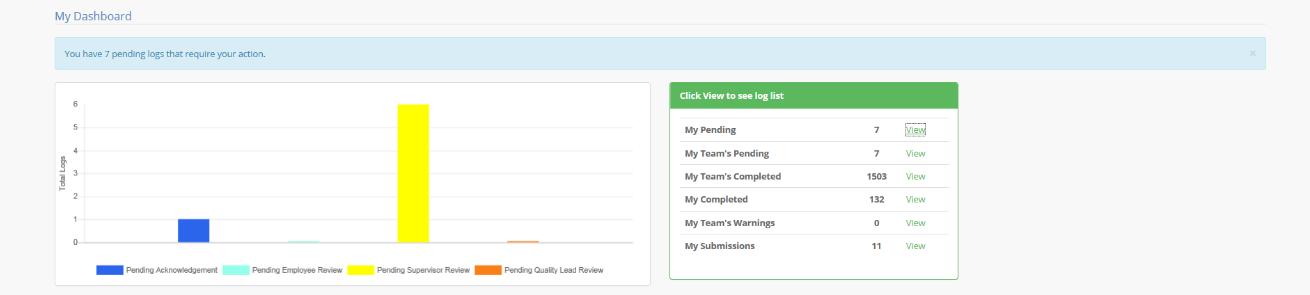


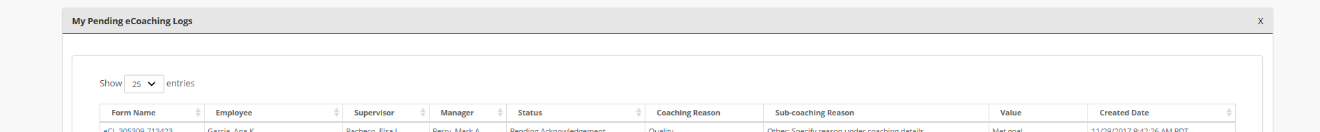


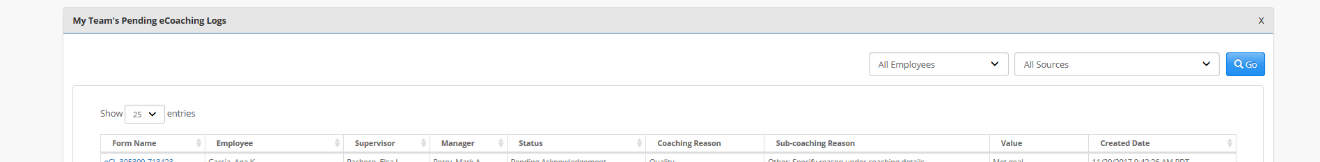


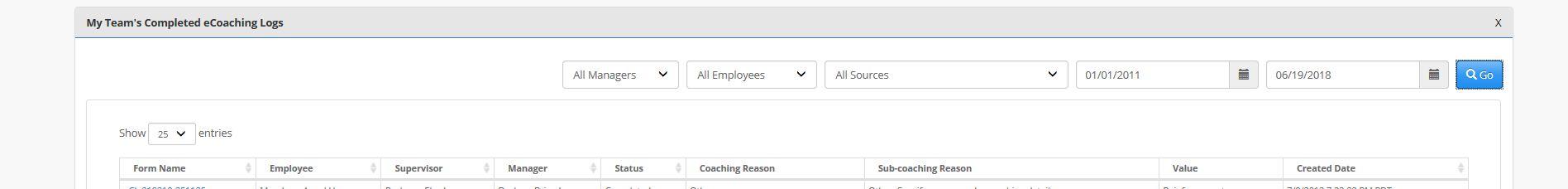


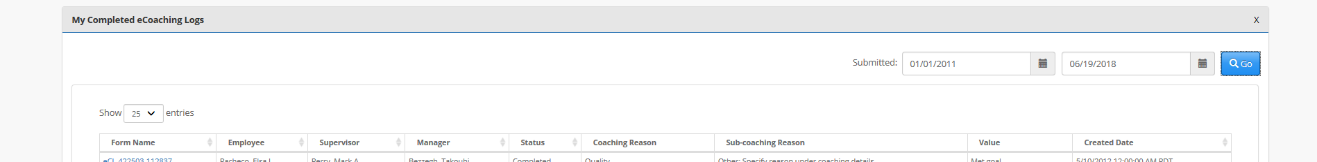
**Supervisor:**

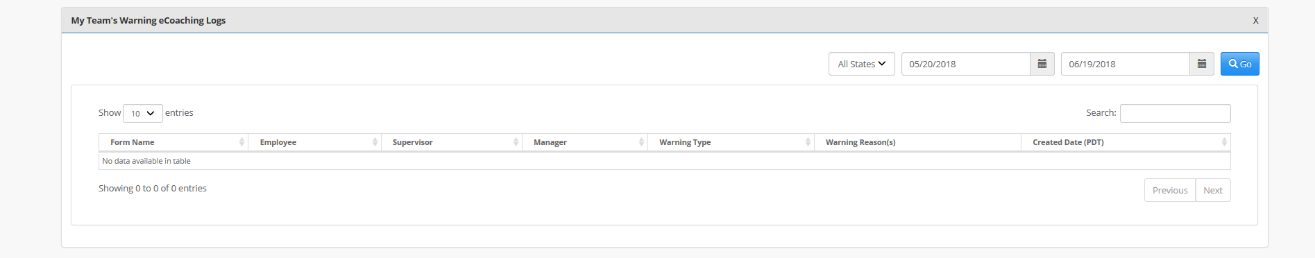


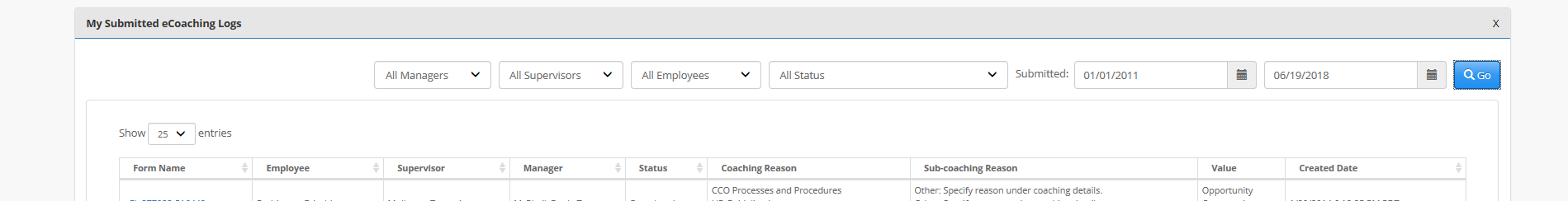




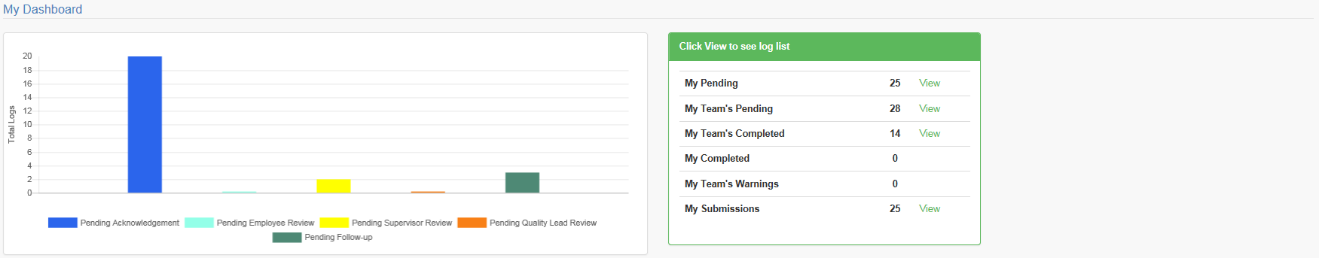


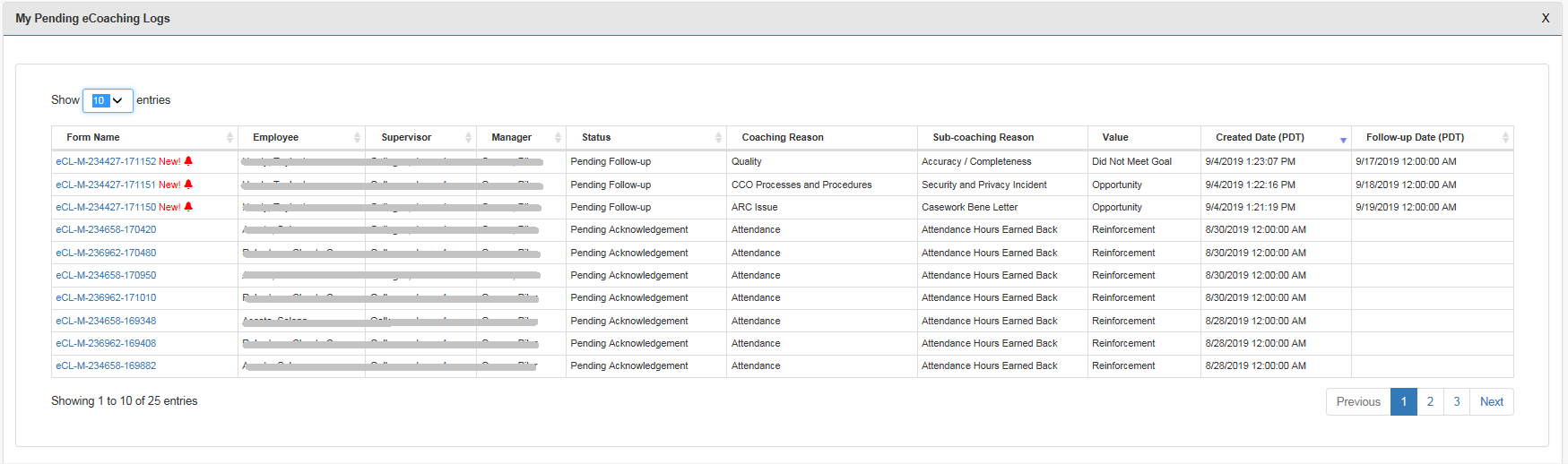


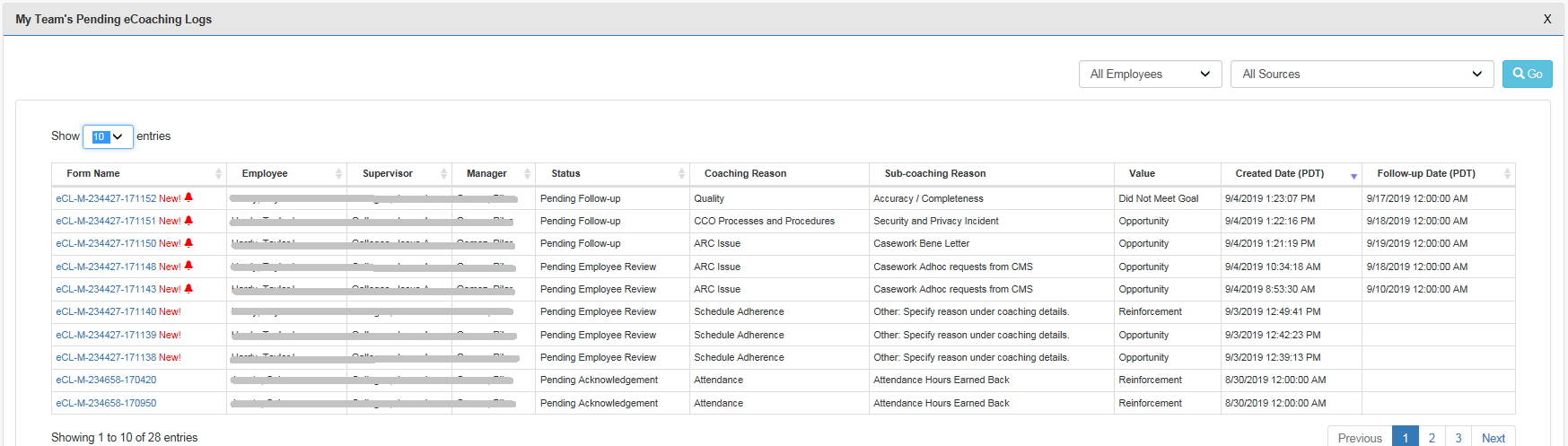




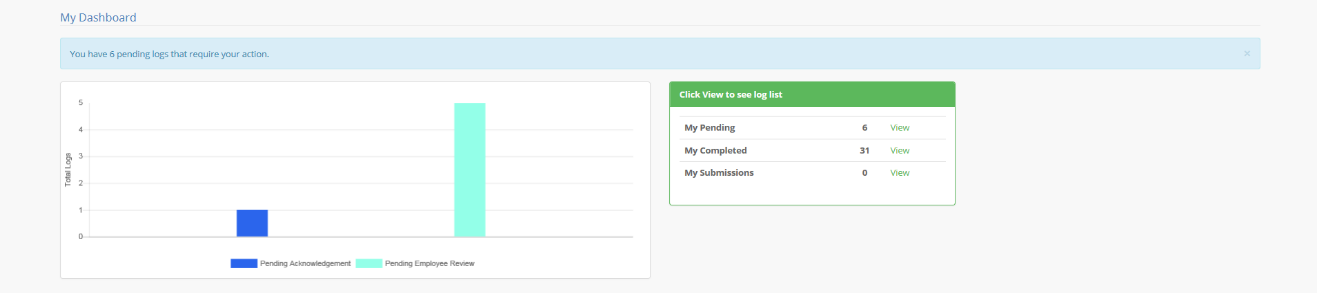
Supervisor (of CSR):

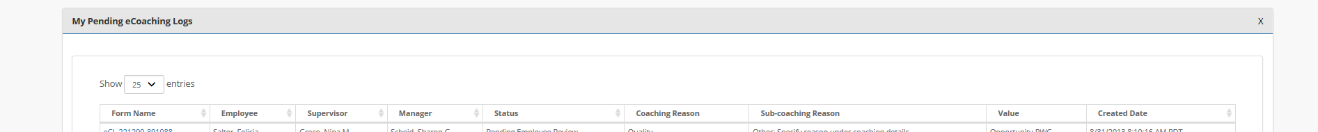


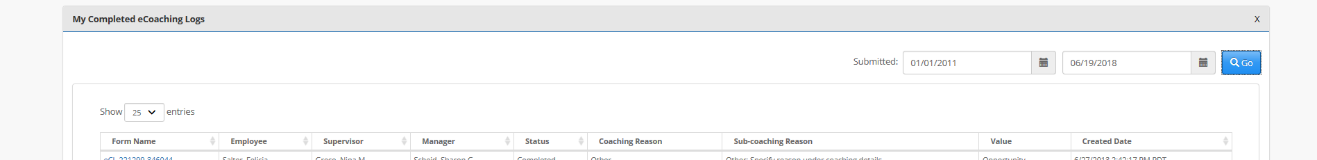


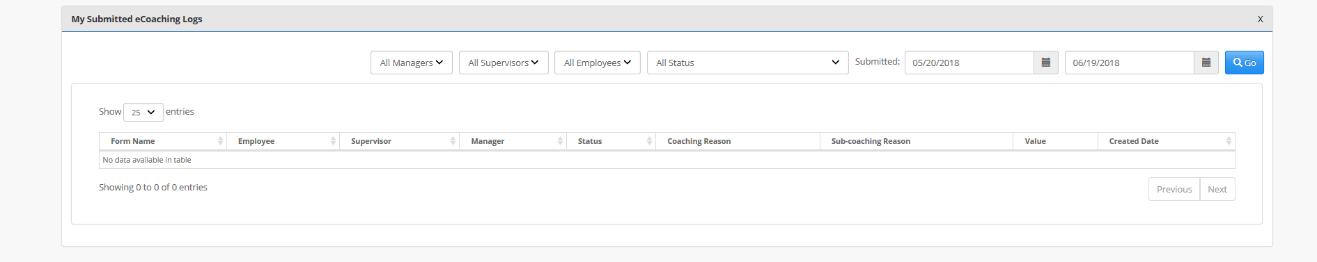


**ARC, Employee:**

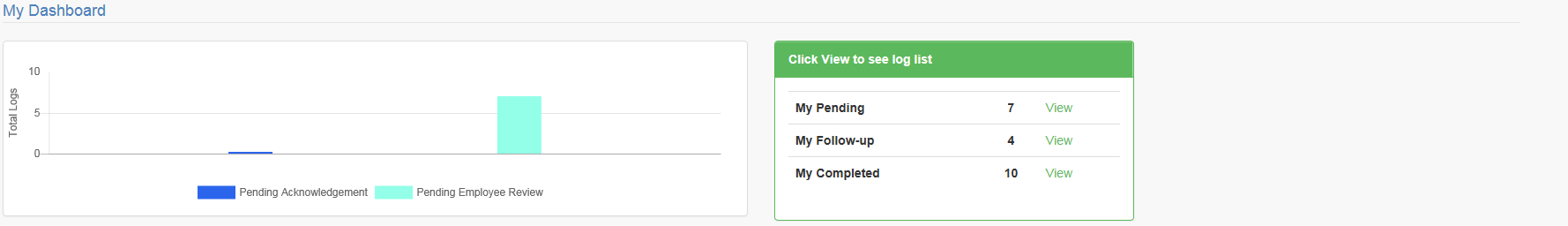


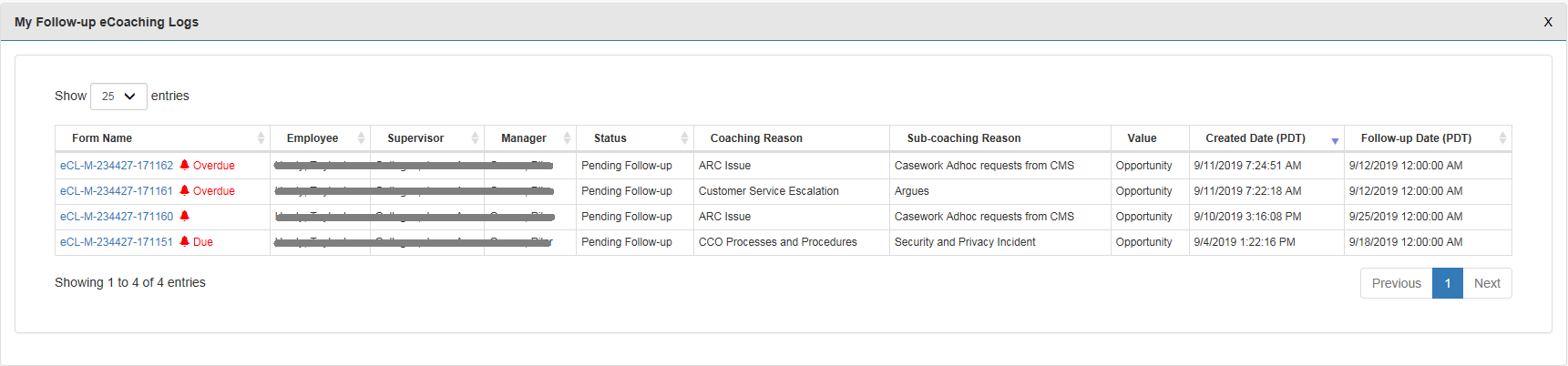






**CSR:**





**Unauthorized to view log details:**



* + 1. Web Page Invoked Events

| Action | Processing & Result |
| --- | --- |
| **Director - start** | |
| Select different month | Controller: MyDashboard  Action: GetDataByMonth  Chart refreshes with data for the selected month;  Site list refreshes with data for the selected month. |
| Click any Site in the Site list table | Controller: MyDashboard  Action: GetLogs  “Pending” radio button is selected;  Pending log list for the selected site and selected month displays. |
| Select Completed radio button | Controller: MyDashboard  Action: GetLogs  “Completed” radio button is selected;  Completed log list for the selected site and selected month displays. |
| Select Warning radio button | Controller: MyDashboard  Action: GetLogs  “Warning” radio button is selected;  Warning log list for the selected site and selected month displays. |
| **Director - end** | |
| **Sr. Manager, Manager, Supervisor - start** | |
| Click any Status in the Log Status List table | Controller: MyDashboard  Action: GetLogs  Logs with the selected status display, log names display as hyperlinks.  Appropriate populated filter dropdowns display. |
| Select different value(s) in the filter dropdown(s); Click “Go” | Controller: MyDashboard  Action: Search  Logs met the selected search criteria display; |
| Select a different page size | Controller: LogBase  Action: LoadData  Logs display per the selected page size; |
| Click any log name in the log list returned from the search. | Controller: LogBase  Action: GetLogDetail  Redirect to Review Controller, which display the selected log details. |
| **Sr. Manager, Manager, Supervisor - end** | |
| **ARC, CSR , Employee- start** | |
| Click any Status in the Log Status List table | Controller: MyDashboard  Action: GetLogs  Logs with the selected status display, log names display as hyperlinks.  Appropriate populated filter dropdowns display. |
| Click any log name in the log list returned from the search. | Controller: LogBase  Action: GetLogDetail  Redirect to Review Controller, which display the selected log details. |
| **ARC, CSR, Employee - end** | |

1. **Stored Procedures**
   1. sp\_Dashboard\_Director\_Summary\_Count
   2. sp\_Dashboard\_Director\_Summary\_Count\_ByStatus
   3. sp\_Dashboard\_Summary\_Count
   4. sp\_Dashboard\_Summary\_Count\_ByStatus
   5. sp\_SelectFrom\_Coaching\_LogMgrDistinctSup
   6. sp\_SelectFrom\_Coaching\_LogMgrDisntinctCSR
   7. sp\_SelectFrom\_Coaching\_LogSupDistinctCSRTeam
   8. sp\_SelectFrom\_Coaching\_LogMgrDistinctSUPTeam
   9. sp\_SelectFrom\_Coaching\_LogMgrDistinctCSRTeam
   10. sp\_Select\_Sources\_For\_Dashboard
   11. sp\_SelectFrom\_Coaching\_LogSupDistinctMGRTeamCompleted
   12. sp\_SelectFrom\_Coaching\_LogSupDistinctCSRTeamCompleted
   13. sp\_SelectFrom\_Coaching\_LogMgrDistinctSUPTeamCompleted
   14. sp\_SelectFrom\_Coaching\_LogMgrDistinctCSRTeamCompleted
   15. sp\_Select\_States\_For\_Dashboard
   16. sp\_Dashboard\_Populate\_Filter\_Dropdowns
   17. sp\_Select\_Statuses\_For\_Dashboard
   18. sp\_Search\_For\_Dashboards\_Details
   19. sp\_Search\_For\_Dashboards\_Count
   20. sp\_Dashboard\_Director\_Site\_Export
   21. sp\_Dashboard\_Director\_Site\_Export\_Count

Refer CCO\_eCoaching\_Log\_Database\_DD.docx for details.