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Detail Design: CCO eCoaching Log – My Dashboard – Quality Now

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Prepared by: Lili Huang Date: 08/05/2021

Department:

Change History Log

| Date | | Change Description | | Author | |
| --- | --- | --- | --- | --- | --- |
| 08/05/2021 | | Initial Revision – TFS 22256 Quality Now Logs Enhancement | | Lili Huang | |
| 02/06/2023 | | 26095 – QNS log change;  Pending Supervisor Review -> Pending Employee Review -> Completed.  Updated screenshot (Supervisor My Pending Review). | | Lili Huang | |
| 03/22/2023 | | TFS 26407 – QN logs (Supervisors’ My Pending Review list): Display “Prepare” or “Coach” link in grey color based on whether supervisors have entered the Evaluation Summary notes or not. | | Lili Huang | |
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1. **Description**

This module allows authorized users (with the following roles) to view/coach QN (Quality Now) and QNS (Quality Now Supervisor) logs as well as to view users’ own submissions. It is accessed by clicking “My Dashboard” in the top menu bar followed by “Quality Now”.

*Please reference CCO\_eCoaching\_Log\_My\_Dashboard\_Common\_DD.docx for role classification.*

* Analyst
* ARC
* CSR
* Employee
* Manager
* Supervisor

1. **Business Logic**

Upon entering Quality Now page:

* Get last three months performance count

**CSR:**

“My last three months performance”

**Manager, Supervisor:**

“My team’s last three months performance”

* Get log type list with associated counts based on user role.

**Analyst:**

A list of the following with counts:

* My Submissions

**ARC, Employee:**

A list of the following with counts:

* My Pending
* My Completed
* My Submissions

**CSR:**

A list of the following with counts:

* My Pending
* My Completed

**Manager:**

A list of the following with counts:

* My Team’s Pending
* My Team’s Completed
* My Submissions

**Supervisor:**

A list of the following with counts:

* My Pending Review
* My Pending Follow-up Preparation
* My Pending Follow-up Coaching
* My Team's Pending
* My Team's Completed
* My Completed
* My Submissions
* 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’s role.

**Analyst:**

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

**ARC, Employee:**

* My Pending Review:
* None
* My Completed:
* None
* My Submissions:
* Manager
* Supervisor
* Employee
* Status
* Submitted Start/End Dates

**CSR:**

* My Pending:
* None
* My Completed:
* Submitted Start/End Dates

**Manager:**

* My Team’s Pending :
* Supervisor
* Employee
* Source
* My Team’s Completed:
* Supervisor
* Employee
* Submitted Start/End Dates
* My Submissions:
* Manager
* Supervisor
* Employee
* Status
* Submitted Start/End Dates

**Supervisor:**

* My Pending:
* QN (radio button)
* QN Supervisor (radio button)
* My Pending Follow-up Preparation
* None
* My Pending Follow-up Coaching
* None
* My Team’s Pending:
* Employee
* Log Staus
* My Team’s Completed:
* Manager
* Employee
* Submitted Start/End Dates
* My Completed :
* Submitted Start/End Dates
* My Submissions:
* Manager
* Supervisor
* Employee
* Log Status
* Submitted Start/End Dates
* 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 action link(s) in the first column.

1. Supervisor

* My Pending Review
* QN
* *Prepare*

Display in grey if evaluation summary exists.

Display in green otherwise.

* Coach

Display in grey if evaluation summary does not exist.

Display in green otherwise.

* QN Supervisor
* *Coach*
* My Pending Follow-up Preparation
* *Review*
* My Pending Follow-up Coaching
* *Prepare*

Display in grey, because at this point of time, evaluation summary must have been entered during “My Pending Review” Prepare.

* *Coach*

Display in green.

* My Team’s Pending
* *View*
* My Team’s Completed
* *View*
* My Submissions
* *View*

1. CSR

* My Pending Review
* *Review*
* My Completed
* *View*

1. Analyst, ARC, Employee, and Manager

* For all sections
* *View*

Click *Go* button:

* Get log list based on the search criteria.
* Refresh the selected log type list section with the log list returned.

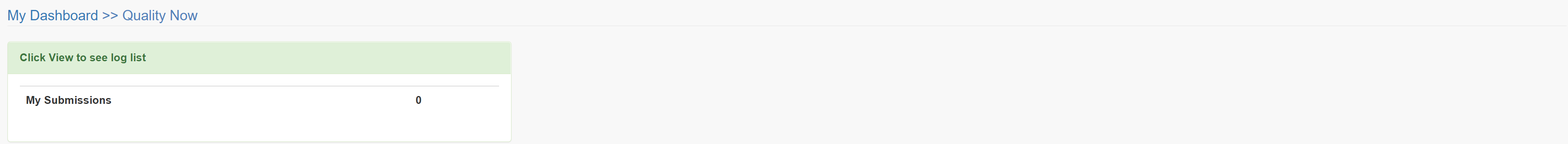
Click [*action*] link:

* Redirect to Review module to display the selected log in a modal dialog.

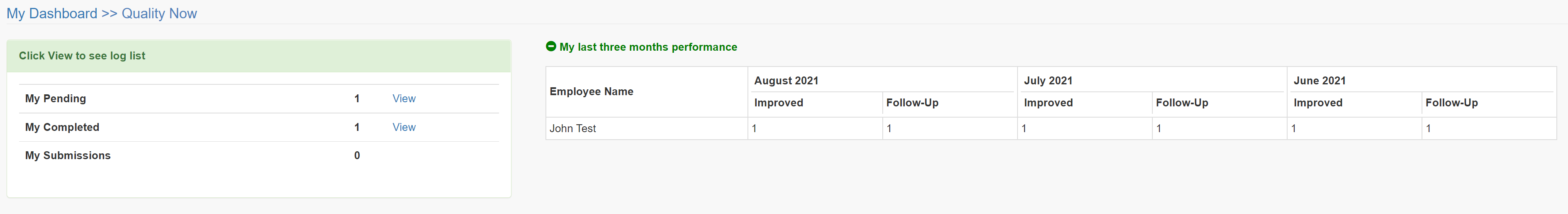
*Please reference CCO\_eCoaching\_Log\_Review\_QualityNow\_DD.docx for details.*

1. **Screenshot**

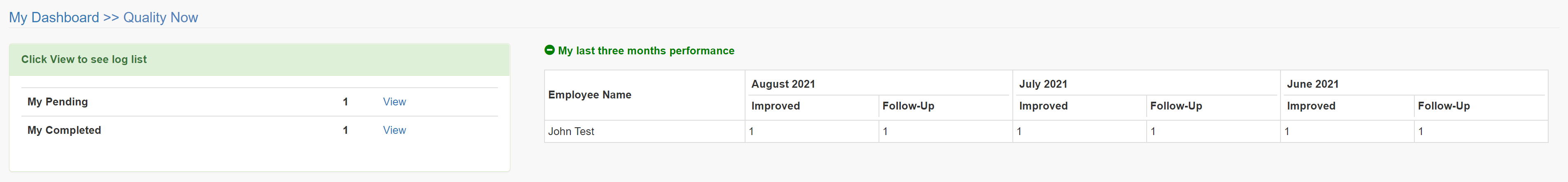
**Analyst:**

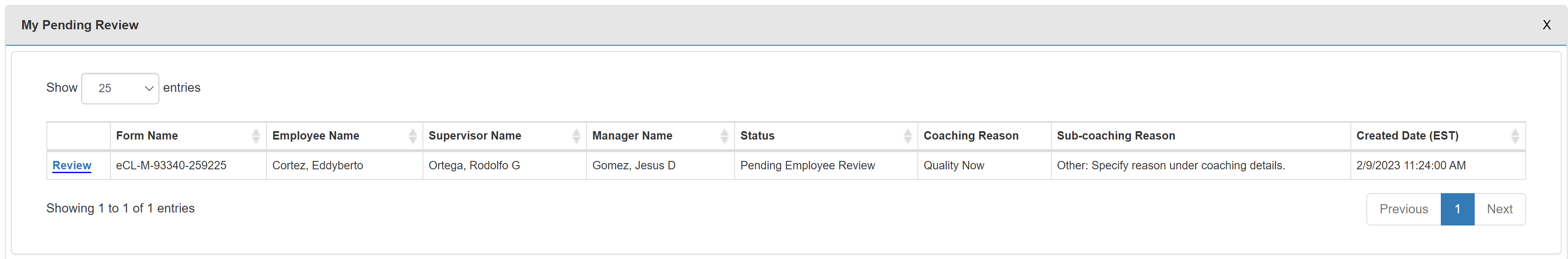


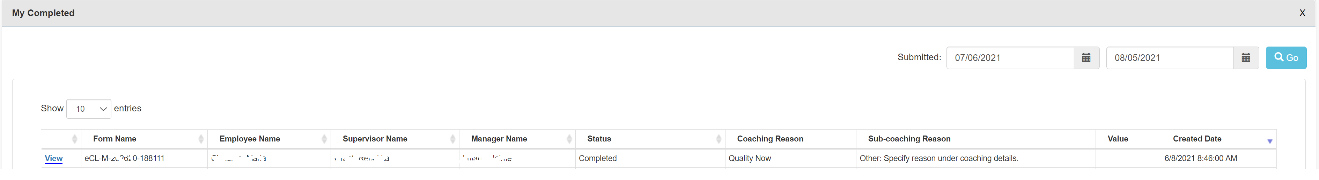
**ARC**



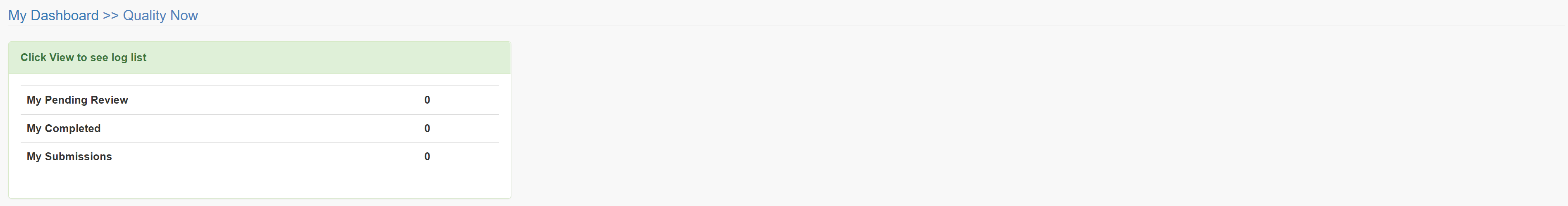
**CSR:**



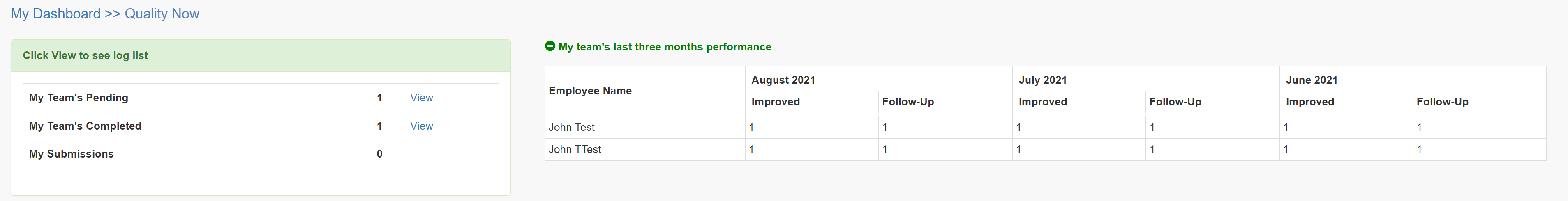


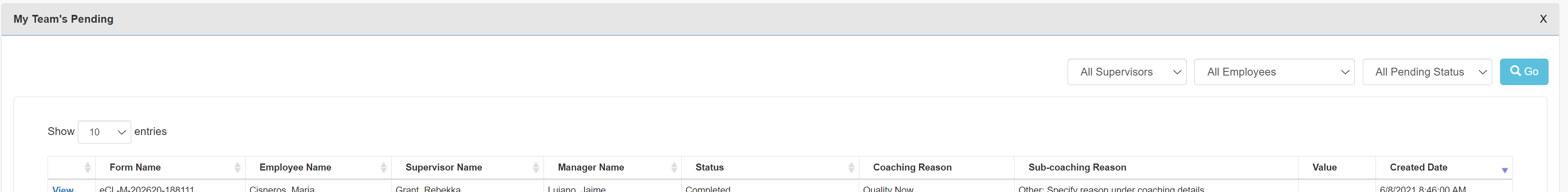


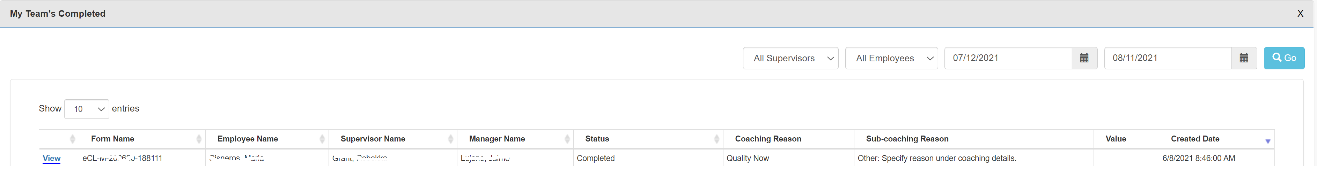
**Employee:**



**Manager:**







**Supervisor:**

