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Detail Design: CCO eCoaching Log - New Submission

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Prepared by: Lili Huang Date: 04/23/2018

Department: FCD

Change History Log

| Date | Change Description | Author |
| --- | --- | --- |
| 04/23/2018 | Initial Revision – TFS 10200 | Lili Huang |
| 07/05/2018 | Minor update per review | Lili Huang |
| 08/31/2018 | TFS11984 – Include a link to ecl sharepoint site to report issues;  Updated 3.4 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 |
| 03/07/2019 | TFS13717 – Add Dual as a Program and Change Module label; | Lili Huang |
| 03/13/2019 | TFS13809 – New Submission: Changing Program resets Direct/Indirect radion btn; | Lili Huang |
| 09/04/2019 | TFS 14679 – Follow-up Process | Lili Huang |
|  |  |  |

Table of Contents

[**1.** **Description** 4](#_Toc512344578)

[**2.** **Business Logic – NewSubmissionController.cs** 4](#_Toc512344579)

[**3.** **Page details - Views\NewSubmission\Index.cshtml** 5](#_Toc512344580)

[3.1 Razor pages comprising Web Page 6](#_Toc512344581)

[3.2 Layout Page 6](#_Toc512344582)

[3.3 Screenshot 6](#_Toc512344583)

[3.4 Web Page Invoked Events 6](#_Toc512344584)

[**4.** **Stored Procedures** 9](#_Toc512344585)

[4.1. sp\_select\_employee\_details 9](#_Toc512344586)

[4.2. sp\_select\_modules\_by\_job\_code 9](#_Toc512344587)

[4.3. sp\_select\_employees\_by\_module\_and\_site 9](#_Toc512344588)

[4.4. sp\_select\_programs 9](#_Toc512344589)

[4.5. sp\_select\_behaviors 9](#_Toc512344590)

[4.6. sp\_select\_coachingrasons\_by\_module 9](#_Toc512344591)

[4.7. sp\_select\_source\_by\_module 9](#_Toc512344592)

[4.8. sp\_select\_subcoachingreasons\_by\_reason 9](#_Toc512344593)

[4.9. sp\_select\_values\_by\_reason 9](#_Toc512344594)

[4.10. sp\_select\_callid\_by\_module 9](#_Toc512344595)

[4.11. sp\_select\_email\_attributes 9](#_Toc512344596)

[4.12. sp\_select\_rec\_employee\_hierarchy 9](#_Toc512344597)

[4.13. sp\_insertinto\_coaching\_log 9](#_Toc512344598)

1. **Description**

This module allows authorized users to submit coaching or warning logs for the following five groups:

* CSR
* SUPERVISOR
* QUALITY
* LSA
* TRAINING

Authorized users are designated as any CCO employees other than non-ARC CSRs. HR users will not have access to this module.

Users enter the New Submission page by clicking “New Submission” on the top menu bar. Based on which group is selected, different information will be collected to complete the submission.

1. **Business Logic – NewSubmissionController.cs**

Upon user enters the page, display Module dropdown only, which is loaded based on user’s employee ID;

* If CSR is selected,
* Display Site dropdown. The Site dropdown has all active sites;
* Display Employee dropdown and Program dropdown once a site is selected; The Employee dropdown has all active employees for the selected site;
* If LSA is selected,
* Display Employee dropdown and Program dropdown; The Employee dropdown has all employees on LSA team;

* If Quality is selected,
* Display Employee dropdown and Program dropdown; The Employee dropdown has all employees on quality team;
* If Supervisor is selected,
* Display Employee dropdown and Program dropdown; The Employee dropdown has all supervisors;
* If Training is selected,
* Display Employee dropdown and Behavior dropdown; The Employee dropdown has all employees on training team;

User selects an employee from the Employee dropdown,

* Display supervisor and manager names for the selected employee;

User selects a program from the Program dropdown or a behavior from the Behavior dropdown,

* Display “Will you be delivering the coaching session?” with two radio buttons (Yes; No, I will not be delivering the coaching session.) if not already displayed;

User selects “Yes” radio button (“Will you be delivering the coaching session?”), display the following:

* If the user is the supervisor of the selected employee,
* Display “Do you need to submit a progressive disciplinary coaching (WARNING)?”, default to “No”;
* If “Yes” is selected,
* Display “Please select type of wanring:” with a dropdown;
* Display “Please select warning reason” with a dropdown;
* Display “Enter/Select the date the warning was issued:” with a textbox and a calendar icon;
* Display “I have verified that all the information on this form is true and complete to the best of my knowledge” with a checkbox;
* Go to “User submits the form by clicking Submit button”;
* “Enter/Select the date of coaching:” with a textbox and a calendar icon;
* “Is this a Customer Service Escalation (CSE)?” with two radio buttons as “Yes”, “No”, default to “No”; (For CSR module only);
* “Select the Type of Coaching from the Categories:” ;
* “Coaching Reasons” as hyperlink, which toggles to show/hide the Coaching Reason list;
* [Coaching Reason list] with checkbox for the selected Module;
* Display sub coaching reason list under the checked coaching reason;
* Display “Opportunity” or “Reinforcement” or both (based on the checked Coaching Reason) with radio buttons;
* “Provide details of the behavior to be coached:” with textarea, maximum 3000 characters;
* “Provide the details from the coaching session including action plans developed:” with textarea, maximum 3000 characters;
* If it is CSR module, display “Is follow-up required?” with two radio buttons as “Yes”, “No”;
* If “Yes” is selected,
* Display “Select the date of follow-up:” with a textbox and a calendar icon;“How was the coaching opportunity identified?” with dropdown;
* “Is there a Call Record associated with the coaching?” with two radio buttons as “Yes”, “No”, default to “No”;
* If “Yes” is selected,
* Display Call Type dropdown (allow users to select a call type) with a textbox (allow users to enter the selected call ID);
* “I have verified that all the information on this form is true and complete to the best of my knowledge” with checkbox;

User selects “No, I will not be delivering the coaching session.” radio button (“Will you be delivering the coaching session?”), display the following:

* “Enter/Select the date of event:” with a textbox and a calendar icon;
* “Select the Type of Coaching from the Categories:” ;
* “Coaching Reasons” as hyperlink, which toggles to show/hide the Coaching Reason list;
* [Coaching Reason list] with checkbox for the selected Module;
* Display sub coaching reason list under the checked coaching reason;
* Display “Opportunity” or “Reinforcement” or both (based on the checked Coaching Reason) with radio buttons;
* “Enter/Select the date of coaching:” with a textbox and a calendar icon;
* “Provide details of the behavior to be coached:” with textarea, maximum 3000 characters;
* If it is CSR module, display “Is follow-up required?” with two radio buttons as “Yes”, “No”;
* If “Yes” is selected,
* Display “Select the date of follow-up:” with a textbox and a calendar icon;
* “How was the coaching opportunity identified?” with dropdown;
* “Is there a Call Record associated with the coaching?” with two radio buttons as “Yes”, “No”, default to “No”;
* If “Yes” is selected,
* Display Call Type dropdown (allow users to select a call type) with a textbox (allow users to enter the selected call ID);
* “I have verified that all the information on this form is true and complete to the best of my knowledge” with checkbox;

User submits the form by clicking Submit button:

* Validate form data;
* If not valid, display validation errors;
* If valid, save data to database; if success, reset the page and display success message; otherwise, display save fail message.
* Send email if the submission is of coaching.

User cancels the submission by clicking Cancel button:

* Reset the page;

1. **Page details - Views\NewSubmission\Index.cshtml**
   1. Razor pages comprising Web Page

\_NewSubmission.cshtml

\_NewSubmissionBottom.cshtml

\_NewSubmissionCoach.cshtml

\_NewSubmissionCoachingReasons.cshtml

\_NweSubmissionIsCoachingByYou.cshtml

\_NewSubmissionTop.cshtml

\_NewSubmissionTop.csthml

\_NewSubmissionWarning.cshtml

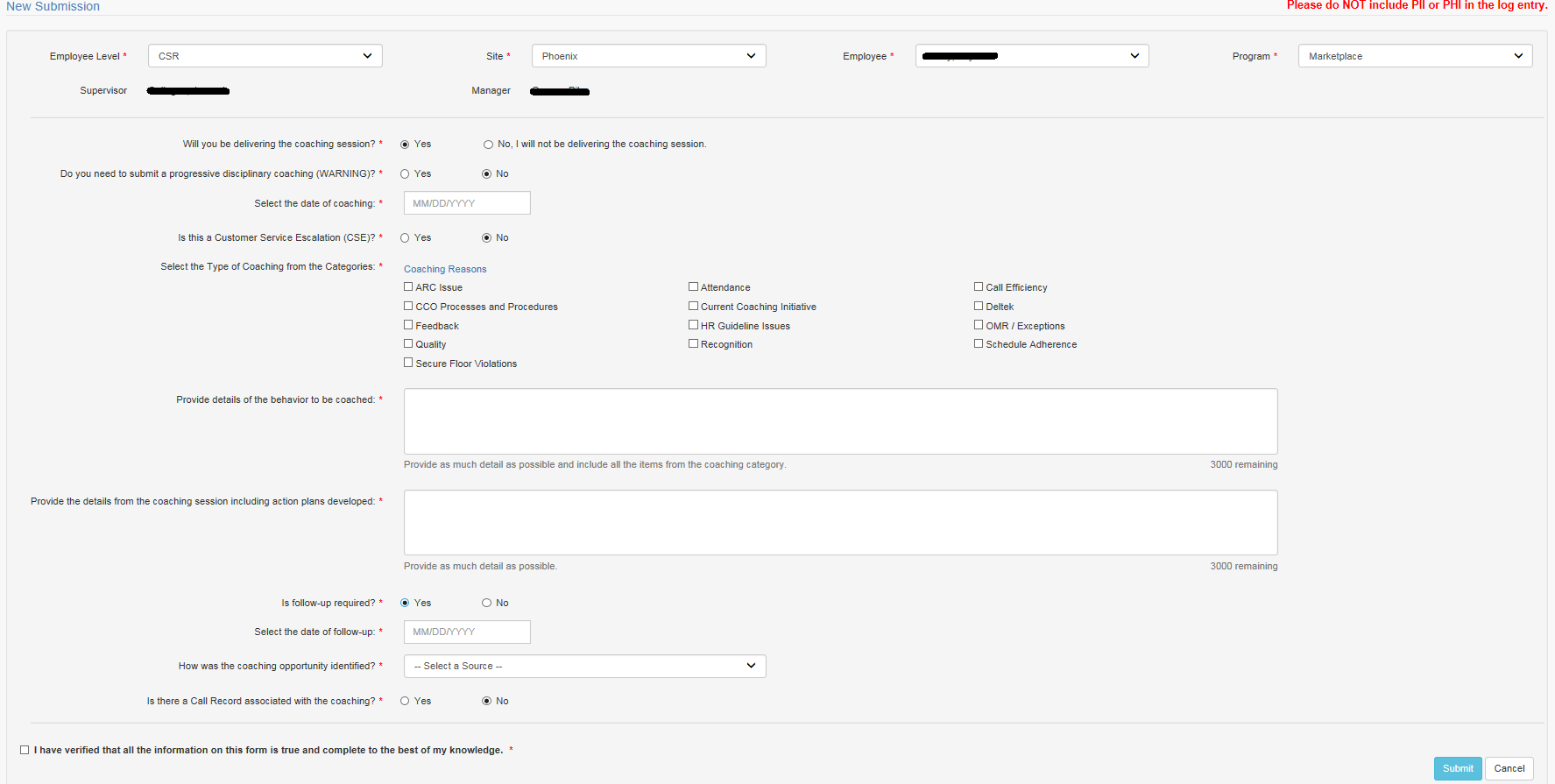
\_NesSubmissionWarningChoice.cshtml

* 1. Layout Page

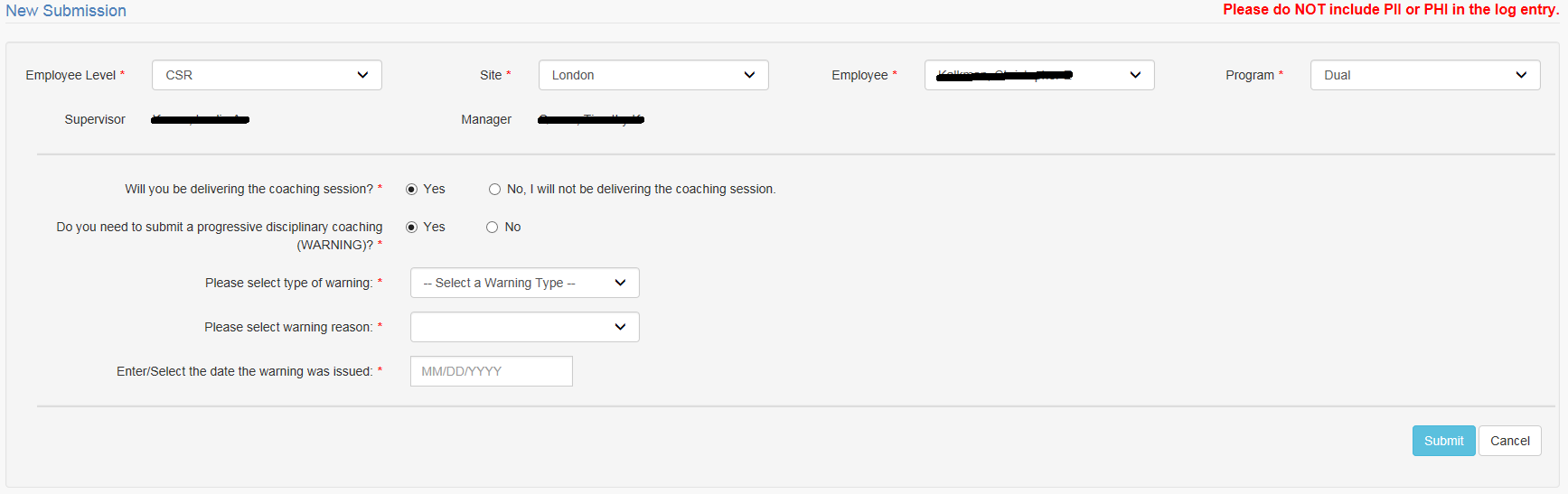
Views\Shared\\_Layoutcshtml

* 1. Screenshot

Submit as a coaching log:



Submit as a warning log:



* 1. Web Page Invoked Events

| Action | Processing & Result |
| --- | --- |
| Select a module from “Employee Level:” dropdown | Ajax call is made to reset the page.  Controller: NewSubmission  Action: ResetPage  If the selected module is other than “CSR” and “Training”, the page displays populated Employee dropdown and Program dropdown;  If the select module is “CSR”, the page displays Site dropdown (with all active sites);  If the selected module is “Training”, the page displays populated Employee dropdown and Behavior dropdown. |
| Select a site from “Site:” dropdown | Controller: NewSubmission  Action: HandleSiteChanged  Display populated Employee dropdown (All CSRs for the selected site) and Program dropdown. |
| Select an employee from “Employee” dropdown | Controller: NewSubmission  Action: GetMgtInfo  Display Supervisor name and manager name of the selected employee. |
| Click “Yes” for “Will you be delivering the coaching session?” | Controller: NewSubmission  Action: ResetPageBottom  Page displays the rest of the questions required for the submission:  Do you need to submit a progressive disciplinary coaching (WARNING)? (*Note: this displays only if the user is the selected employee’s supervisor);*  Enter/Select the date of coaching;  Is this a Customer Service Escalation (CSE), (*Note: this is for CSR module only);*  Select the Type of Coaching from the Categories;  Provide details of the behavior to be coached;  Provide the details from the coaching session including action plans developed;  How was the coaching opportunity identified;  Is there a Call Record associated with the coaching |
| Click “Yes” for “Do you need to submit a progressive disciplinary coaching (WARNING)?” | Controller: NewSubmission  Action: ResetPageBottom  Page displays the rest of the questions required for the warning log submission:  Please select type of warning;  Pelase select warning reason;  Enter/Select the date the warning was issued. |
| Click “No” for “Will you be delivering the coaching session?” | Controller: NewSubmission  Action: ResetPageBottom  Same as “Yes”, except not displaying question “Provide the details from the coaching session including action plans developed”. |
| Click “Yes” for “Is this a Customer Service Escalation (CSE)?” | Controller: NewSubmission  Action: LoadCoachingReasons  Coaching Reasons section will be refreshed. |
| Select a Coaching reason by checking the checkbox | Controller: NewSubmission  Action: HandleCoachingReasonClicked  Display sub coaching reason dropdown and “Opportunity”, “Reinforcement” radio buttons for the selected Coaching reason. |
| UnSelect a Coaching reason by unchecking the checkbox | Controller: NewSubmission  Action: HandleCoachingReasonClicked  Hide sub coaching reason dropdown and “Opportunity”, “Reinforcement” radio buttons for the selected Coaching reason. |
| Select “Yes” for “Is follow-up required?” | Javascript to show:  Follow-up date textbox, and a calendar icon;  Note: Follow-up date must be within 30 days of the submission date. |
| Select “No” for “Is follow-up required?” | Javascrip to hide:  Follow-up date textbox, and the calendar icon |
| Select “Yes” for “Is there a Call Record associated with the coaching?” | Javascript to show:  Call Type dropdown, and a text box for entering Call ID |
| Select “No” for “Is there a Call Record associated with the coaching?” | Javascript to hide:  Call Type dropdown, and a text box for entering Call ID |
| Click Submit button | Controller: NewSubmission  Action: Save |

1. **Stored Procedures**
   1. sp\_select\_employee\_details
   2. sp\_select\_modules\_by\_job\_code
   3. sp\_select\_employees\_by\_module\_and\_site
   4. sp\_select\_programs
   5. sp\_select\_behaviors
   6. sp\_select\_coachingreasons\_by\_module
   7. sp\_select\_source\_by\_module
   8. sp\_select\_subcoachingreasons\_by\_reason
   9. sp\_select\_values\_by\_reason
   10. sp\_select\_callid\_by\_module
   11. sp\_select\_email\_attributes
   12. sp\_select\_rec\_employee\_hierarchy
   13. sp\_insertinto\_coaching\_log

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