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Detail Design:

eCoaching\_Survey\_DD

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Prepared by: Lili Huang Date: 09/23/2015

Department: HCSD

Change History Log

| Date | Change Description | Author |
| --- | --- | --- |
| 09/23/2015  10/09/2015  03/22/2015  06/08/2015 | Initial Revision – TFS 594  TFS 594 –  Updated 6.1.3 Screen shot  Updated 6.1.3 Screen shot  TFS 2907 – Survey can be completed after being inactivated  Updated 2.1.1 Business Logic  Added 3.1.2 IsSurveyInactive | Lili Huang  Lili Huang  Lili Huang  Lili Huang |
| 11/17/2016 | TFS 4743 – Don’t set default values to all questions  Updated 6.1.3 Screen Shot | Lili Huang |
| 01/08/2018 | TFS 9603 – Pilot Site(s) to have 6th question | Lili Huang |
|  |  |  |

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1. **Description**

The eCL Coaching Survey provides a way to collect CSRs feedback about their coaching experience. Every month, any CSR who has acknowledged and completed at least one eCoaching log and has not been chosen to do the survey for that month may receive a survey notification email, which has a link that takes the CSR to the Survey page.

The survey has five required questions, one required hot topic question if enabled, and one optional question for any additional comment. To ensure supervisors are effectively coaching their CSRs, a sixth survey question is added and piloted in the Lawrence site, “How prepared was your supervisor during your coaching session?” with five choices of “Very prepared, Prepared, Neither Prepared or Unprepared, Unprepared, and Very unprepared”. The hot topic question is for all sites other than Lawrence.

1. **Presentation Layer**
   1. MySurvey.aspx.vb
      1. Business Logic

When the page displays for the first time (not post back):

Get the survey id request parameter;

Get the survey from database

If the user is not authorized for the survey

Display not authorized message

Else

If the survey is completed

Display survey completed message

Else if the survey is inactivated

Display survey inactivated message

Else

Bind survey questions to the page

When Submit button is clicked:

If page validation fails,

Display error message

Else

Load the data entered on the page to survey object

Save the survey to database

If the survey is successfully saved

Display success message

Else

Display error message on the top of the page

* 1. MySurveyLogDetailView.aspx.vb
     1. Business Logic

When the page displays for the first time (not post back), the user is authorized for the survey,

And the survey has not been completed yet:

Get the survey log name from session

Get survey log details

Get survey log coaching reasons/subreasons

Bind survey details and survey reasons to the page

1. **Business Layer**
   1. MySurveyHandler.vb
      1. IsAccessAllowed

Check if the user’s employee ID matches the survey’s employee ID

* + 1. IsSurveyInactive

Check if the survey has been inactivated.

* + 1. IsSurveyCompleted

Check if the survey has been completed

* + 1. GetSurvey

Get the survey by calling GetSurvey method in business layer

* + 1. SaveSurvey

Save the survey to database

* + 1. GetQuestion

Get question by question ID

* 1. MySurveyLogDetailViewHandler.vb
     1. GetLogReasons

Get coaching reasons and sub reasons for the survey log

Bind to the page

Get details of the survey log

Bind to the page

* + 1. GetLogDetail

Get the details of the log

1. **Data Access Layer**
   1. MySurveyDBAccess.vb
      1. GetSurvey

Get survey general information (employee ID, survey log name, survey status, and if the survey contains hot topic for the month) by calling GetSurveyInfo

Get survey questions by calling GetSurveyQuetions

Get single choices data by calling GetSingleChoices

* + 1. GetSurveyInfo

Get survey general information (employee ID, survey log name, survey status, and if the survey contains hot topic for the month) by calling stored procedure sp\_Select\_SurveyDetails\_By\_SurveyID

* + 1. GetSurveyQuestions

Get survey questions by calling stored procedure sp\_Select\_Questions\_For\_Survey

* + 1. GetSingleChoices

Get single choices by calling stored procedure sp\_Select\_Responses\_For\_Survey

* + 1. SaveSurvey

Save survey to database by calling stored procedure sp\_Update\_Survey\_Response

* 1. MySurveyLogDetailDBAccess.vb
     1. GetLogReasons

Get coaching reasons and sub reasons by calling stored procedure sp\_SelectReviewFrom\_Coaching\_Log\_Reasons

* + 1. GetLogDetail

Get details of the log by calling stored procedure sp\_SelectReviewFrom\_Coaching\_Log

1. **Stored Procedures**
   1. Sp\_Select\_SurveyDetails\_By\_SurveyID

* 1. sp\_Select\_Questions\_For\_Survey
  2. sp\_Select\_Responses\_By\_Question

* 1. sp\_Update\_Survey\_Response

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

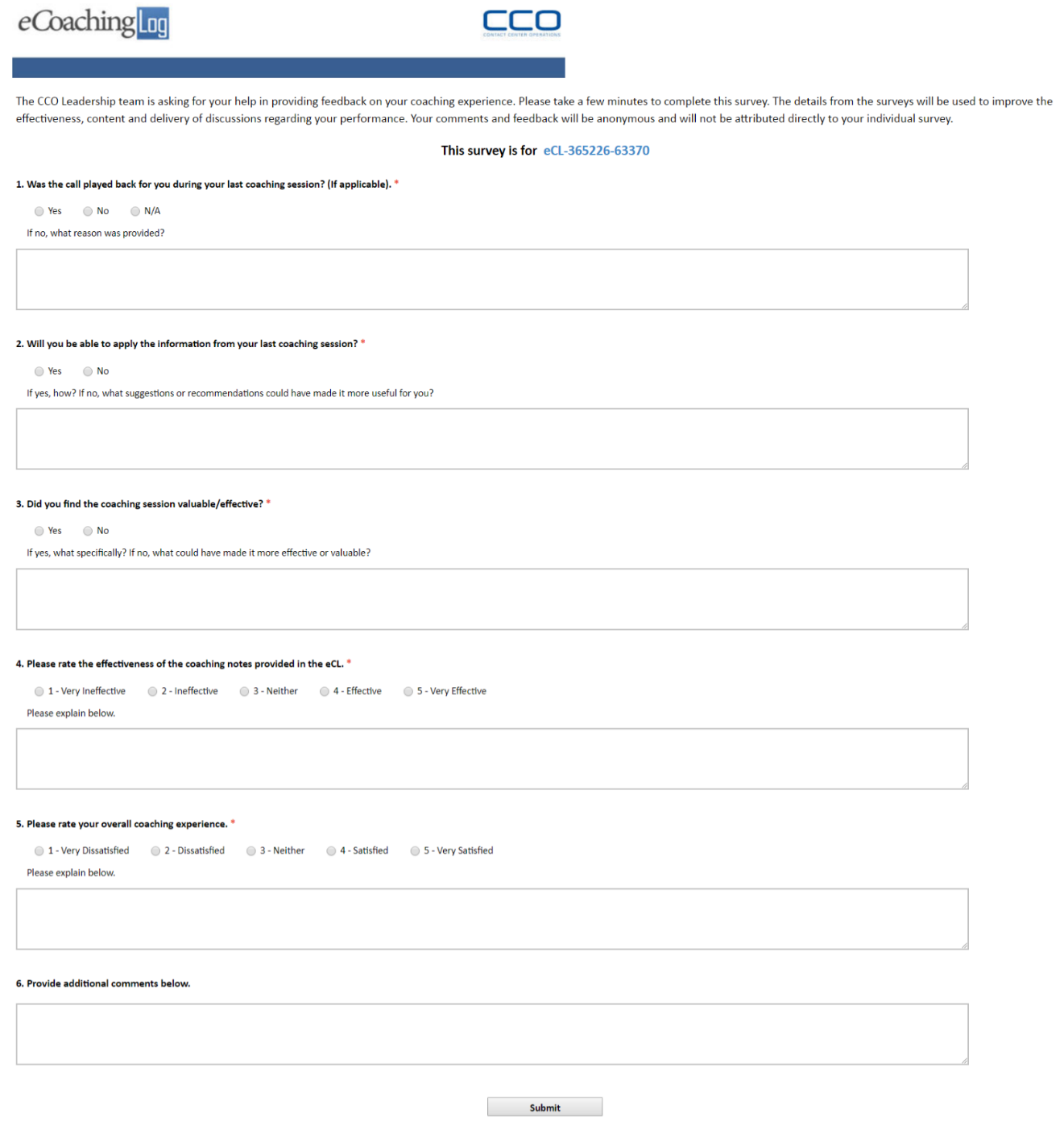
1. **Page details**
   1. Survey Page (MySurvey.aspx)
      1. ASPX pages comprising Web Page

MySurvey.aspx

* + 1. Master Page

Site4.Master

* + 1. Screen Shot



* + 1. Links

|  |  |
| --- | --- |
| Link Link Name | Destination |
| [log form name] | My Survey Log Detail page (MySurveyLogDetailView.aspx |

* + 1. Web Page Invoked Events

| Action | Processing & Result |
| --- | --- |
| OnPageLoad | MySurvey.aspx is loaded. |
| Click [log form name] link | Javascript displayDetailModal() is called to pop up Log Detail modal dialog |
| Click on “Submit” button | The form is submitted. |

* + 1. Form Fields

| **Page Name** | **Field Type** | **Field Name** | **Default Value** | **Data Element Source** | **Validation** |
| --- | --- | --- | --- | --- | --- |
| MySurvey.aspx | Label |  | The Quality team is asking for your help in providing feedback on your coaching experience with your supervisor. Please take a few minutes to complete this survey. The details from this survey will be used to improve the effectiveness, content and delivery of discussions regarding your performance. |  |  |
| Label |  | This survey is for |  |  |
| Link |  | [log form name] | Survey\_Response\_Header.FormName |  |
| **Question #1:** | | | | | |
| MySurvey.aspx | Label |  | 1.Was the call played back for you during your last coaching session? (If applicable). | Survey\_DIM\_Question.Description |  |
| RadioButtonList | Question1RadioButtonList | Yes  No  N/A | Survey\_DIM\_QAnswer.ResponseValue | required |
| Label |  | If no, what reason was provided? | Survey\_DIM\_Question.Description |  |
| Text Box | Question1TextBox |  |  | optional |
| **Question #2:** | | | | | |
| MySurvey.aspx | Label |  | 2.Will you be able to apply the information from your last coaching session? | Survey\_DIM\_Question.Description |  |
| RadioButtonList | Question2RadioButtonList | Yes  No | Survey\_DIM\_QAnswer.ResponseValue | required |
| Label |  | If yes, how? If no, why not? | Survey\_DIM\_Question.Description |  |
| TextBox | Question2TextBox |  |  | optional |
| **Question #3:** | | | | | |
| MySurvey.aspx | Label |  | 3.Did you find the coaching sesson valuable/effective? | Survey\_DIM\_Question.Description |  |
| RadioButtonList | Question3RadioButtonList | Yes  No | Survey\_DIM\_QAnswer.ResponseValue | required |
| Label |  | If yes, what specifically? If no, why not? | Survey\_DIM\_Question.Description |  |
| MySurvey.aspx | TextBox | Question3TextBox |  |  | optional |
| **Question #4:** |  |  |  |  |  |
| MySurvey.aspx | Label |  | 4.Please rate the effectiveness of the coaching notes provided in the eCL. | Survey\_DIM\_Question.Description |  |
| RadioButtonList | Question4RadioButtonList | 1-Very Ineffective  2-Ineffective  3-Neither  4-Effective  5-Very Effective | Survey\_DIM\_QAnswer.ResponseValue | required |
| Label |  | Please explain below. | Survey\_DIM\_Question.Description |  |
| TextBox | Question4TextBox |  |  | optional |
| **Question #5:** | | | | | |
| MySurvey.aspx | Label |  | 5.Please rate your overall coaching experience. | Survey\_DIM\_Question.Description |  |
| RadioButtonList | Question5RadioButtonList | 1-Very Dissatisfied  2-Dissatisfied  3-Neither  4-Satisfied  5-Very Satisfied | Survey\_DIM\_QAnswer.ResponseValue | required |
| Label |  | Please explain below. | Survey\_DIM\_Question.Description |  |
| TextBox | Question5TextBox |  |  | optional |
| **Question #6:** | | | | | |
| *Display for non-pilot site (Hot Topic Question) if hot topic question is enabled* | | | | | |
| MySurvey.aspx | Label |  | TBD | Survey\_DIM\_Question.Description |  |
|  | RadioButtonList | Question5RadioButtonList | TBD | Survey\_DIM\_QAnswer.ResponseValue | required |
| *Display for pilot site only* | | | | | |
| MySurvey.aspx | Label |  | 6.How prepared was your supervisor during your coaching session? | Survey\_DIM\_Question.Description |  |
|  | RadioButtonList | Question5RadioButtonList | 1-Very prepared  2-Prepared  3-Neither Prepared or Unprepared  4-Unprepared  5-Very unprepared | Survey\_DIM\_QAnswer.ResponseValue | required |
| **Question #7:** | | | | | |
| MySurvey.aspx | Label |  | 7.Provide additional comments below. |  |  |
| TextBox | CommentTextBox |  |  | optional |

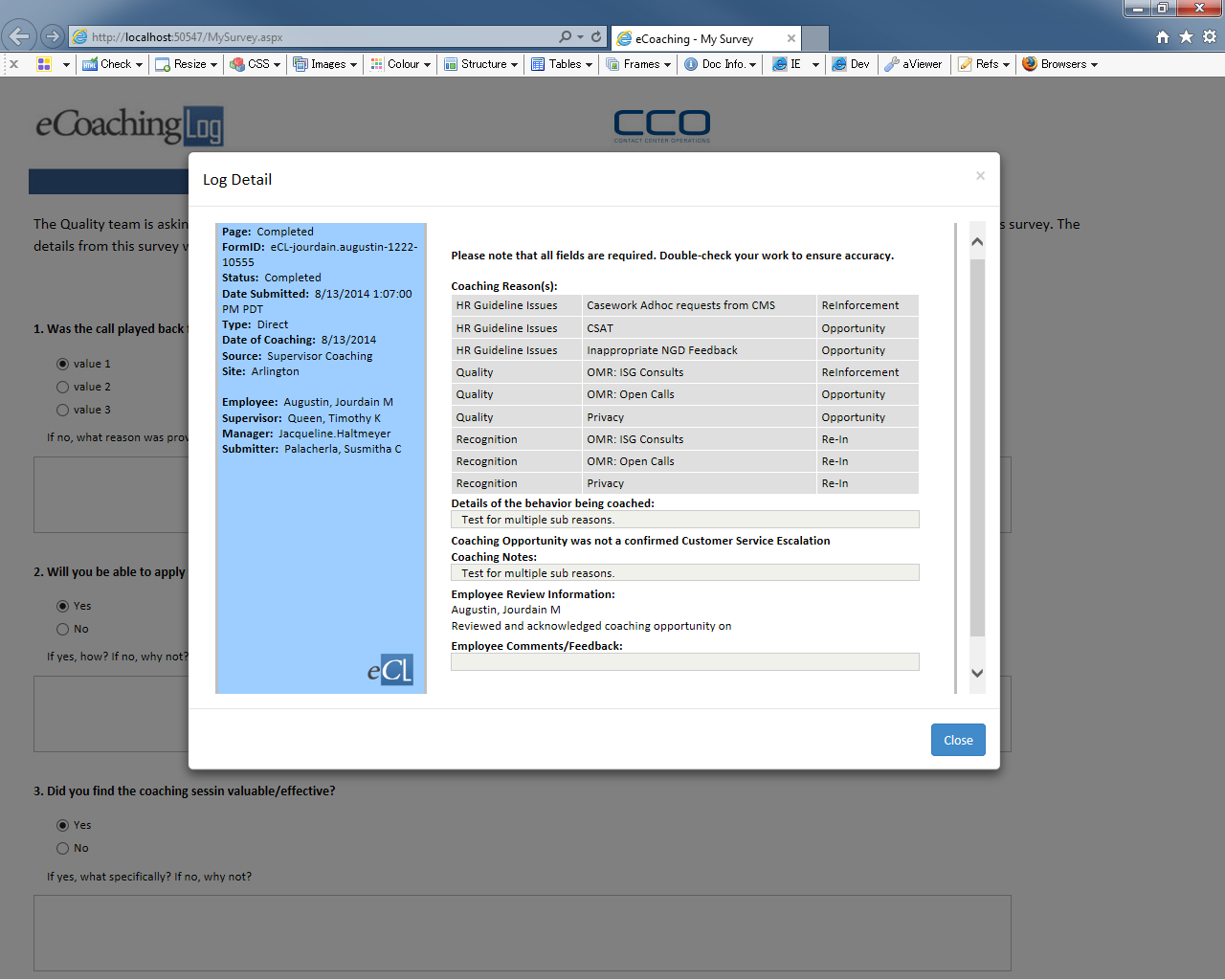
* 1. Survey Log Detail Page (MySurveyLogDetailView.aspx)

This page displays as a modal dialog on the Survey Page.

* + 1. Master Page

Site3.Master

* + 1. Screen Shot



* + 1. Links

None

* + 1. Web Page Invoked Events

None

* + 1. Form Fields

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Page Name** | **Field Type** | **Field Name** | **Default Value** | **Data Element Source** | **Display** |
| Begin Left Side Content: | | | | | |
| MySurveyLogDetailView.aspx | Label |  | Page: |  |  |
| Label |  |  | Dim\_Status.Status |  |
| Label |  | FormID: |  |  |
| Label |  |  | Coaching\_Log.FormName |  |
| Label |  | Status: |  |  |
| Label |  |  | Dim\_Status.Status |  |
| Label |  | Date Submitted: |  |  |
| Label |  |  | Coaching\_log.SubmittedDate |  |
| Label |  | Type: |  |  |
| Label |  |  | Dim\_Source.CoachingSource |  |
| Label |  | Date of Coaching: |  | Displays if the log is “direct”. |
| Label |  |  |  |
| Label |  | Date of Event: |  | Displays if the log is “indirect” |
| Label |  |  |  |
| Label |  | Source: |  |  |
| Label |  |  |  |  |
| Label |  | Site: |  |  |
| Label |  |  |  |  |
| Label |  | Verint ID: |  | Displays if it’s Verint monitor. |
| Label |  |  | Coaching\_log.verintID |
| Label |  | Scorecard Name: |  |  |
| Label |  |  |  |  |
| Label |  | Avoke ID: |  | Displays if it’s behavior analytics monitor. |
| Label |  |  | Coaching\_log.AvokeID |
| Label |  | NGD Activity ID: |  | Displays if it’s NGD Activity monitor. |
| Label |  |  | Coaching\_log.NGDActivityID |
| Label |  | Universal Call ID: |  | Displays if it’s Universal call monitor |
| Label |  |  | Coaching\_log.UCID |
| Label |  | Employee : |  |  |
| Label |  |  | Employee\_Hierarchy.Emp\_Name |  |
| Label |  | Supervisor: |  |  |
| Label |  |  | Employee\_Hierarchy.Sup\_Name |  |
| Label |  | Manager: |  |  |
| Label |  |  | Employee\_Hierarchy.Mgr\_LandID |  |
| Label |  | Submitter: |  |  |
| Label |  |  | Employee\_Hierarchy.Emp\_Name |  |
| Image |  | eclogo.png |  |  |
| End Left Side Content. | | | | | |
| Begin Right Side Content: | | | | | |
| MySurveyLogDetailView.aspx | Label |  | Please note that all fields are required. Double-check your work to ensure accuracy. |  |  |
| Label |  | Coaching Reason(s): |  |  |
| GridView |  |  | Stored procedure  sp\_SelectReviewFrom\_Coaching\_Log\_Reasons |  |
|  |  | Details of the behavior being coached: |  |  |
| Table |  |  | Coaching\_log.Description |  |
|  |  | Coaching Opportunity was a confirmed Customer Service Escalation |  | Displays if Coaching Reason is “Customer Service Escalation” |
| Label |  | Management Notes: |  | Displays if Coaching Reason is NOT “Customer Service Escalation” |
| Label |  |  | Coaching\_Log.MgrNotes |
| Label |  | Coaching Opportunity was not a confirmed Customer Service Escalation |  | Displays if Coaching Reason is NOT “Customer Service Escalation” |
| Label |  | Coaching Notes: |  |  |
| Label |  |  | Coaching\_Log.CoachingNotes |  |
| Label |  | Employee Review Information: |  |  |
| Label |  |  | Employee\_Hierarchy.Emp\_Name |  |
| Label |  | Reviewed and acknowledged coaching opportunity on |  |  |
| Label |  |  | Coaching\_Log.CSRReviewAutoDate |  |
| Label |  | Supervisor Review Information: |  | Displays if it’s IQS. |
| Label |  |  | Employee\_Hierarchy.Sup\_Name |
| Label |  | Reviewed and acknowledged Quality Monitor on |  |
|  |  |  | Coaching\_Log.SupReviewedAutoDate |
| Label |  | Employee Comments/Feedback: |  | Displays if it’s NOT IQS. |
| Label |  |  | Coaching\_Log.CSRComments |
| End Right Side Content. | | | | | |