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eCoaching Log Website

Detailed Design

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| --- | --- | --- |
| Last Revision | Last Review | Description |
|  |  |  |

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: Update to reflect ARC as any potential WACS\* job code user - 2.4.2 - page 6  Also corrected error for coaching delivery – 2.4.2 – page 7 | Jourdain Augustin |
| 10/10/2014 | P13479 - Add WARNING question in the eCoaching Log  2.4.2 - page 7-10 | Jourdain Augustin |
| 11/24/2014 | P13542 – Indicate warning questions allowed for supervisor module  2.4.2 – page 7-10 | Jourdain Augustin |
| 01/15/2015 | P13653 – Include LSA Module users  2.2 and 2.3 – page 5 | Jourdain Augustin |
| 02/04/2015 | P14065 - Update list to include "Human Resource staff"  2.3 – page 5  Also update text to include space between "Quality," and "Supervisor" in last bullet  2.2 – page 5 | Jourdain Augustin |
| 02/18/2015 | P14304 – Update eCoaching - Display coachingreason / subcoachingreason in warning section  2.4.2 - Page 8 - Change control type of Warning Reasons field from "Multi-select Listbox" to "Dropdown"  2.4.2 - page 10 - move Error text message to above submit button  2.4.2 - page 10 - add error message for warning duplicate at Error text message | Jourdain Augustin |
| 04/15/2015 | P14512 – Update eCoaching - Training module to be added to eCoaching  2.2 - Page 6 - Updated 2.2 last bullet to change to 5 modules including "Training"  2.3 - Page 6 - Added trainers as user population  2.4.2 - page 7 - added new dynamic question set for behavior  correction - updated program question set to include validation section | Jourdain Augustin |
| 05/05/2015 | P14881 – Authentication  Updated:  2.4.1 “eCoaching Log” Page (default.asp – secure)  2.4.2 “eCoaching Log” Page (default2.asp – secure) | Lili Huang |
| 05/07/2015 | P14803 - eCoaching - SMTP Relay Server Transfer: Updated assumption section 2.2 to include reference to new SMTP server | Jourdain Augustin |

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

# eCoaching Log Application

## Purpose

The eCoaching Log application shall be an access point to add coaching information.

## Assumptions

* The eCoaching Log application will not be 508 compliant
* Vangent and GDIT domain users will have access to the eCoaching Log application.
* All CSRS (except for ARC CSRs) will not be allowed to submit eCoaching records.
* Access to the eCoaching Log Control web page will be authenticated via the active directory LAN Identification.
* The eCoaching Log application will incorporate 4 modules, CSR, Quality, Supervisor, LSA and Training
* eCoaching application SMTP server will be “smtpout.gdit.com”

## User

Users of the eCoaching Log application will include the following:

* CSRs
* CSR Supervisors
* Managers
* Quality Specialist Coaching
* BCC Support Staff
* LSA staff
* Human Resource staff
* Training Staff

## Page Description

### “eCoaching Log” Page (default.asp – secure)

This page shall be the main launching page for eCoaching application functionality. Tabs will be dynamically displayed based on a user’s authentication and authorization. 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** |
| --- | --- | --- | --- | --- |
| Image | ABC-1 | eCL.jpg | N/A | N/A |
| Display the following if user authorized non-CSR or authorized ARC CSR | | | | |
| Tab | A-2 | New Submissions | N/A | N/A |
| Include default2.aspx | | | | |
|  | | | | |
| Display for all users | | | | |
| Tab | B-2 | My Dashboard | N/A | N/A |
| Include view2.aspx | | | | |
|  | | | | |
| Display the following if user authorized non-CSR or authorized ARC CSR | | | | |
| Tab | C-2 | My Submissions | N/A | N/A |
| Include view3.aspx | | | | |
|  | | | | |
| Display the following if user’s job role is non-CSR | | | | |
| Tab | D-2 | Historical Dashboard | N/A | N/A |
| Include view4.aspx | | | | |
|  | | | | |
|  | | | | |

### “eCoaching Log” Page (default2.asp – secure)

This page shall be displayed if a user has been authenticated and/or authorized to access the vangent.local Network (this includes ad.local users accessing servers on the vangent.local network). Users who do not have a record in the EC.Employee\_Hierarchy table and users who have CSR level job codes within the EC.Employee\_Hierarchy table & not in the table Historical\_Dashboard\_ACL with a role of “ARC” will be redirected to the page - error2.aspx: (displayName, mail, title). 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** |
| --- | --- | --- | --- | --- |
| Display the following if user authorized | | | | |
| Text | AB-2 | Welcome to the eCoaching Log. Please not that all fields are required. | Display Informational Text | N/A |
| Image | C-3 | ajax-loader5.gif | Display the progress image when a database search is being processed to populate the dropdowns. | N/A |
| Module Selection | | | | |
| Text | AB-2 | Select Coaching Module: |  | N/A |
| Dropdown | AB-5 | List of modules accessible | EC.sp\_Select\_Modules\_By\_Job\_Code | N/A |
|  | | | | |
| If module requires site | | | | |
| Text | AB-4 | 1. Select Employee Site: \* |  | N/A |
| Dropdown | AB-5 | List of Employee sites | EC.sp\_Display\_Sites\_For\_Module | N/A |
| Text | C-4 | Validate an employee was selected in the dropdown list. | When no employee site is selected, display the message:  “Select an employee site option.” | N/A |
|  | | | | |
| Text | AB-7 | #. | Dynamic question number | N/A |
| Text | AB-7 | Select Employee Name: \* |  | N/A |
| Dropdown | AB-8 | List of employees based on module | EC.sp\_Select\_Employees\_By\_Module | N/A |
| Text | C-7 | Validate employee name was selected in the dropdown. | When no employee name is selected, display the message:  “Select a Employee.” | N/A |
| Text | AB-9 | #. | Dynamic question number | N/A |
| Text | AB-9 | Employee Supervisor: |  | N/A |
| Text | AB-10 | Display supervisor’s name, LAN id and title. | On employee selection, field is made visible. The supervisor name stored from the employee information will be used to search user ids for the following information:   * User name * LAN id * Title | N/A |
| Text | AB-11 | #. | Dynamic question number | N/A |
| Text | AB-11 | Employee Manager: |  | N/A |
| Text | AB-11 | Display manager’s name, LAN id and title. | On employee selection, field is made visible. The manager name stored from the employee information will be used to search user ids for the following information:   * User name * LAN id * Title | N/A |
| Display the following if module selected includes program question | | | | |
| Text | AB-12 | #. | Dynamic question number | N/A |
| Text | AB-12 | Select the appropriate program for this coaching:\* |  | N/A |
| Text | AB-12 | Validate program was selected in the dropdown. | When no program is selected, display the message:  “Select a program option.” | N/A |
| Dropdown | AB-12 | List of program options based on module | EC.sp\_Select\_Programs | N/A |
|  | | | | |
| Display the following if module selected includes behavior question | | | | |
| Text | AB-12 | #. | Dynamic question number | N/A |
| Text | AB-12 | Select the appropriate behavior for this coaching:\* |  | N/A |
| Text | AB-12 | Validate behavior was selected in the dropdown. | When no behavior is selected, display the message:  “Select a behavior option.” | N/A |
| Dropdown | AB-12 | List of behavior options based on module | EC.sp\_Select\_Behaviors | N/A |
|  | | | | |
| Text | AB-13 | #. | Dynamic question number | N/A |
| Text | AB-13 | Will you be delivering the coaching session? \* |  | N/A |
| Radio | AB-14 | Linked radio buttons to allow one selected. | Select one of the following options. (Required)   * **Yes**, I will be delivering the coaching session. * **No**, I will not be delivering the coaching session. | N/A |
| Text | AB-14 | Validate a coaching delivery option was selected. | When no coaching delivery option has been selected, display the following message:  “Select a coaching delivery option.” | N/A |
| Text | AB-15 | Error text when one of the validations fails. | Display the following text if any of the validations fails:  “Please correct all fields indicated in red to proceed.” | N/A |
| Display the following when delivery selected is “Yes” / Direct | | | | |
| Display the following when the selected employee reports to current user (supervisor) or current user’s employee (manager) for CSR or Supervisor module) | | | | |
| Text | AB-15 | #. | Dynamic question number | N/A |
| Text | AB-15 | Do you need to submit a progressive disciplinary coaching (WARNING)? \* |  | N/A |
| Radio | AB-15 | Linked radio buttons to allow one selected. | Select one of the following options. (Required)   * **Yes**, I will be delivering the coaching session. * **No**, I will not be delivering the coaching session. | N/A |
| Text | AB-15 | Validate a warning delivery option was selected. | When no warning delivery option has been selected, display the following message:  “Indicate whether this record is a WARNING or not.” | N/A |
|  | | | | |
| Display if Warning selection is “Yes” | | | | |
| Text | AB-TBD | Please select type of warning. |  |  |
| Dropdown | AB-TBD |  | EC.sp\_Select\_CoachingReasons\_By\_Module | N/A |
| Text | AB-TBD |  | When no warning coaching reason is selected, display the message:  “Please select a type of warning.” |  |
| Text | AB-TBD | Warning Reasons |  |  |
| Dropdown | AB-TBD |  | EC.sp\_Select\_SubCoachingReasons\_By\_Reason | N/A |
| Text | AB-TBD |  | When no warning coaching sub reason is selected, display the message:  “Please select a warning sub reason.” |  |
|  | | | | |
| Text | AB-15 | #. | Dynamic question number | N/A |
| Text | AB-15 | Enter/Select the date of coaching: \* | If Warning option selected is “Yes” then text replaced with :  “Enter/Select the date the warning was issued:” | N/A |
| Textbox | AB-15 | [Date2] | Text box for Date in the format “mm/dd/yyyy”.  May be selected by the pop-up calendar.  (Required) | N/A |
| Image | AB-15 | [Calendar\_scheduleHS.png] | Calendar object opens when the image is selected. | N/A |
| Text | AB-15 |  | When invalid date is entered, display the message:  “Enter a valid event date.” | N/A |
|  | | | | |
| Display the following when delivery selected is “No” / Indirect | | | | |
| Text | AB-15 | #. | Dynamic question number | N/A |
| Text | AB-15 | Enter/Select the date of event: \* |  | N/A |
| Textbox | AB-15 | [Date1] | Text Box for Date in the format “mm/dd/yyyy”.  May be selected by the pop-up calendar.  (Required) | N/A |
| Image | AB-15 | [Calendar\_scheduleHS.png] | Calendar object opens when the image is selected. | N/A |
| Text | AB-15 |  | When invalid date is entered, display the message:  “Enter a valid event date.” | N/A |
|  | | | | |
| If Indirect or “No” for Warning then display the following | | | | |
| Text | AB-16 | #. | Dynamic question number | N/A |
| Text | AB-16 | Is thjs a Customer Service Escalation (CSE)? \* |  | N/A |
| Radio | AB-16 | Linked radio buttons to allow one selected. | Select one of the following options. (Required)   * **Yes** * **No** | N/A |
| Text | AB-16 |  | When no CSE option has been selected, display the following message:  “Indicate whether this is a CSE or not.” | N/A |
| Text | AB-17 | #. | Dynamic question number | N/A |
| Text | AB-17 | Select the Type of Coaching from the Categories Below: \* |  | N/A |
| Text | AB-17 | Coaching Reasons | Display text ” | N/A |
| Repeatable row for each return in - EC.sp\_Select\_CoachingReasons\_By\_Module | | | | |
| Checkbox | AB-18 |  |  | N/A |
| Text | AB-18 | [CoachingReason] | EC.sp\_Select\_CoachingReasons\_By\_Module | N/A |
| Dropdown | AB-18 |  | Menu hidden until corresponding checkbox is selected.  EC.sp\_Select\_SubCoachingReasons\_By\_Reason | N/A |
| Text | AB-18 |  | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Radio | AB-18 | Opportunity | Radio button hidden if not applicable to coaching reason.  Radio button disabled until corresponding checkbox is selected.  EC.sp\_Select\_Values\_By\_Reason | N/A |
| Radio | AB-18 | Reinforcement | Radio button hidden if not applicable to coaching reason.  Radio button disabled until corresponding checkbox is selected.  EC.sp\_Select\_Values\_By\_Reason | N/A |
| Text | AB-18 |  | When no radio button has been selected, display the following message:  “You must also select Opportunity or Reinforcement” | N/A |
|  | | | | |
| Text | AB-TBD | #. | Dynamic question number | N/A |
| Text | AB-TBD | Provide details of the behavior to be coached: \* |  | N/A |
| Multiline text box | AB-TBD |  | Freeform text box to allow the more information to be entered on the behavior being coached. | < 3,000 Bytes |
| Text | AB-TBD | [max length: 3,000 chars] | Display informational text for the text box | N/A |
| Text | AB-TBD | Provide as much detail as possible and include all the items from the coaching category. | Display information text for the text box | N/A |
| Display the following when delivery selected is “Yes” / Direct | | | | |
| Text | AB-TBD | #. | Dynamic question number | N/A |
| Text | AB-TBD | Provide the details from the coaching session including action plans developed: \* |  | N/A |
| Multiline text box | AB-TBD |  | Freeform text box to allow details from the coaching session to be captured including action plans. | < 3,000 Bytes |
| Text | AB-TBD | [max length: 3,000 chars] | Display informational text for the text box | N/A |
| Text | AB-TBD | Provide as much detail as possible | Display information text for the text box | N/A |
|  | | | | |
|  | | | | |
| Display if Indirect or not Warning | | | | |
| Text | AB-TBD | #. | Dynamic question number | N/A |
| Text | AB-TBD | How was the coaching opportunity identified? \* |  | N/A |
| Dropdown | AB-TBD |  | EC.sp\_Select\_Source\_By\_Module | N/A |
| Text | AB-TBD |  | When no source is selected, display the message:  “Please select how the coaching was identified.” | N/A |
| Text | AB-TBD | #. | Dynamic question number | N/A |
| Text | AB-TBD | Is there a Call Record associated with this coaching? \* |  | N/A |
| Radio | AB-TBD | [Linked radio buttons to allow one selected] | Select one of the following options. (Required)   * **Yes** * **No** | N/A |
| Text | AB-TBD |  | When no call record option is selected, display the message:  “Indicate if the item has a Call Record or a NGD Activity ID.” | N/A |
| Display if Call Record selection is “Yes” | | | | |
| Dropdown | AB-TBD |  | EC.sp\_Select\_CallID\_By\_Module | N/A |
| Textbox | AB-TBD |  | Required when Call Record selection is “Yes” | N/A |
| Text | AB-TBD |  | When no source is selected, display the message:  “Please select how the coaching was identified.” |  |
|  | | | | |
| Text | AB-TBD | [Validate a call record option was selected] | When no call record option has been entered, display the following message:  “Call Record IDs must be in the correct format.” | N/A |
| Checkbox | AB-TBD |  | Checkbox to acknowledge the information on the panel has been reviewed | N/A |
| Text | C-49 | I have verified that all the information on this form is true and complete to the best of my knowledge. \* | Display “loading…” text when submit has been pressed. | N/A |
|  | | | | |
| Image | C-3 | ajax-loader5.gif | Display the progress image when a database search is being processed to populate the dropdowns. | N/A |
| Text | C-52 | Error text message | When there is a field that is not completed or selected, display the following message:  “Please correct all fields indicated in red to proceed.”  If duplicate warning submitted display the following message: "A warning with the same category and type already exists. Please review your warning section in the My Dashboard for details." | N/A |
| Button | C-51 | Submit button | On submit, commit the information from the page to the database.  Return to the Panel 1 page on successful update. | N/A |
|  | | | | |
| Display in Informational Display section | | | | |
| Text | F2 | Status: New – [module] Coaching |  | N/A |
| Text | F3 | Date Submitted: [date] | Display “Date Submitted“ followed by current date. | N/A |
| Text | F3 | Site: [Site] | Display “Site:“ followed by Selected site. | N/A |
| Text | F3 | Employee: [Employee displayName] | Display “Employee :“ followed by selected Employee display name. | N/A |
| Text | F3 | Supervisor: [Supervisor displayName] | Display “Supervisor:“ followed by corresponding supervisor display name. | N/A |
| Text | F3 | Manager: [Manager displayName] | Display “Manager:“ followed by corresponding manager display name. | N/A |
|  | | | | |