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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 |
| 07/13/2015 | 14881 – Authentication  Updated: “eCoaching Log” Page (default.asp – secure)“eCoaching Log” Page (default2.asp – secure) | Lili Huang |
| 07/23/2015 | TFS 363 – Duplicate form names  Updated 2.4.2 “eCoaching Log” Page (default2.aspx – secure) to include form naming convention. | Lili Huang |
| 10/22/2015 | TFS 974 – Add Warning Section to All eCoaching Modules  Updated 2.4.2 “eCoaching Log” Page (default2.asp – secure) | Lili Huang |

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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

## 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 only on page non post back

| .**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 only on page non post back.

To avoid duplicate form names, UI will pass the form’s recipient Lan ID to stored procedures sp\_InsertInto\_Coaching\_Log and sp\_InsertInto\_Warning\_log, the stored procedures will first insert the record with form name as the recipient Lan ID, then update the inserted record with the form name as below:

eCL-EmployeeLanID-PrimaryKey

where EmployeeLanID is the form’s recipient Lan ID; For a Coaching form, PrimaryKey is the CoachingID of the inserted record in Coaching\_Log table; For a Warning form, PrimaryKey is the WarningID of the inserted record in Warning\_Log table.

| **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) | | | | |
| 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 |
|  | | | | |