\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



eCoaching Log Website

Detailed Design

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Prepared by: Dean Geils Date: November 12, 2012

Department, Location: Engineering, Coralville

**Approved by: Date:**

Change History Log

| Date | Change Description | Author |
| --- | --- | --- |
| 11/12/2012 | Initial Draft | Dean Geils |
| 08/01/2013 | SCCB-S10700 - eCL - Update Coaching to include new sites and CSRs in submission form (DD)   1. Updated CSR Dropdown menu to include new sites – 3.4.1 | Jourdain Augustin |
| 08/01/2013 | SCCB-S10180 - eCL AD migration LAN ID- Updating the appliation to handle LAN ID   1. Updated coaching submission page to refer to hierarchy database table to check job code for user authorization | Jourdain Augustin |
| 08/01/2013 | SCCB-P10409: eCoaching Log: Update workflow and Form for new Coaching Process  1.Updated coaching submission page dropdown menu to include “IQS” as new coaching opportunity option | Jourdain Augustin |
| 08/16/2013 | SCCB-P10869: eCoaching Log: simpify job codes to determine permissions on dashboards   1. Updated 3.4.1 to reflect simplified job code usage. | Jourdain Augustin |
| 08/21/2013 | SCCB-P10901 – IQS – SSIS feed to eCL 1. Updated 2.1 and 3.4.1 to reflect updated references of “Verint Journal” to “Quality or PPoM” | Jourdain Augustin |
| 03/31/2014 | SCCB-S11841 - eCoaching Log Database and User Interface Redesign - Phase 1:   1. 3.4.1 - Corrected default2.aspx references of eMailid to Lan id 2. Added new program dropdown menu 3. Added new CSE radio button question 4. Deleted Quality, NGD and Behavioral Analytics questions 5. Updated coaching reasons section for redesign 6. 2.1 - Updated Web Edits 7. Removed all field hints from default2.aspx 8. Hid “Opportunity” radio button for Recognition section 9. Update “Reinforcement” radio button for Recognition section | Jourdain Augustin |
| 04/30/2014 | SCCB-12495 - eCoaching - move the eCoaching Log application from sharepoint to desktop :   1. Added new section 3.4.1 for default.aspx 2. Updated default2.aspx to include PHI warning text – “Please do NOT include PII or PHI in the log entry.” 3. Removed eCL logo from default2.aspx to prevent duplication of logo display. 4. Removed field hints and corresponding graphic – FormResource.jpg | Jourdain Augustin |
| 05/01/2014 | SCCB – 12667 - eCoaching - Remove "Houston" site from eCoaching CSR Site menu:   1. Updated 3.4.2 to remove “Houston” as a valid selectable value in CSR site menu. | Jourdain Augustin |
| 06/20/2014 | SCCB – 12897 - eCL - Coaching Source request:   1. Updated 3.4.2 to modify source dropdown menu for direct and indirect page of submission page to change ‘CMS Customer Call Listening’ to ‘CMS Reported Item’ and add ‘Internal CCO Reporting’  page 21 | Jourdain Augustin |
| 07/15/2014 | SCCB-P13129- eCoaching - Add ETS subcoaching reason under Attendance:   1. Updated “Attendance” coaching reason sub menu to include “ETS” value if user job code is ( “\*40” OR "\*50" OR “\*60” OR “WISY13”) AND (formtype = “Direct”) – 3.4.2. – page 17 | Jourdain Augustin |
| 08/07/2014 | SCCB-P13263- eCoaching - Update Coaching to allow other CSR job code users to submit coaching :   1. Updated submission page description of default.aspx to reference new ARC conditions via CSRs who will not be allowed access – 3.4.2. – page 11 | Jourdain Augustin |
| 09/02/2014 | SCCB-P13386 eCL - FFM ARC eCoaching Process: 1. Updated submission page description of default.aspx to reference new ARC conditions via CSRs who will not be allowed access – 3.4.2. – page 11 | Jourdain Augustin |

1 Design Criteria 4

1.1.1 Page Layout’ 4

1.1.2 App Title 4

1.1.3 Page Information 4

1.1.4 Information Gathering 4

1.1.5 Informational Display 5

1.1.6 Footer 5

1.1.7.1.2 Purpose 5

1.2 Library Usage 6

1.2.1 Style Sheets 6

2 Edits 6

2.1 Web Edits 6

3 eCoaching Log Application 7

3.1 Purpose 7

3.2 Assumptions 7

3.3 User 7

3.4 Page Description 7

3.4.1 “eCoaching Log” Page (default2.asp – secure) 7

3.5 Data Flow Diagram 16

3.6 Database 16

4 Data Flow Diagram 17

4.1 eCoaching Retrieve process 17

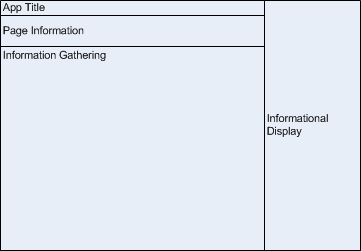
5 Includes 17

5.1 eCL Stylesheet (site.css) 17

# Design Criteria

### Page Layout’

Page layouts are shown in the following figures. Information on each region is given in the following sections.



### App Title

The eCoaching Log will include the title logo image at the top of the page. The title shall not have a hyperlink.

### Page Information

The Page Information will display directions for completion of Information Gathering. The text to be displayed will be “Welcome to the eCoaching Log. Please note that all fields are required.”. The User Identification shall not have a hyperlink.

### Information Gathering

The Infromation Gathering will allow users to provide information for the eCoaching Log.

### Informational Display

The Information Display area will provide information the about the page, status, date, etc. The “eCL” logo will be displayed in the lower right corner of this section. No hyperlink will be displayed in this area.

### Footer

The eCoaching Log application does not have footer information.

* + - 1. Location Grid

## Purpose

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 |

## Library Usage

The eCoaching Log application uses VBScript, Java Script, Stylesheet and HTML libraries, all as outlined by their respective API’s. No custom libraries are used within the site.

## Style Sheets

A style sheet is provided for the eCoaching application.

* site.css - Contains common definitions used for the eCoaching application

# Edits

## Web Edits

eCL.asp

|  |  |
| --- | --- |
| Code | Text |
| 01 | Select a CSR site option. |
| 02 | Select a CSR. |
| 03 | Select a program option |
| 04 | Select a coaching delivery option. |
| 05 | Enter a valid event date. |
| 06 | Indicate whether this is a CSE or not. |
| 07 | Please select a coaching sub reason. |
| 08 | You must also select “Opportunity” or “Reinforcement” |
| 09 | Please select a coaching sub reason. |
| 10 |  |
| 11 | At least one coaching reason above must be selected to continue. |
| 12 | Please provide details of the behavior to be coached. |
| 13 | Please select how the coaching was identified. |
| 14 | Enter a Call Record number for this coaching. |
| 15 | Enter a valid coaching date. |
| 16 | Please provide details from the coaching session including action plans developed. |
|  |  |

# 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 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 Vangent LAN Identification.

## User

Users of the eCoaching Log application will include the following:

* CSRs
* CSR Supervisors
* Managers
* Quality Specialist Coaching
* BCC Support 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.

| **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 with values (WACS01, WACS03 or (WACS02 & not in the table Historical\_Dashboard\_ACL with a role of “ARC”)) will be redirected to the page - error2.aspx: (displayName, mail, title)

| **Control Type** | **Format** | **Text or Description** | **Field Content/Action** | **Field Length** |
| --- | --- | --- | --- | --- |
| Display the following if user authorized | | | | |
| Information Gather Page Header | | | | |
| Text | AB-2 | Welcome to the eCoaching Log. Please not that all fields are required. | Display Informational Text “” | N/A |
| Text | AB-2 | Please do NOT include PII or PHI in the log entry. | 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 |
|  | | | | |
| Panel 1 | | | | |
| Text | AB-4 | 1. Select the CSR’s Site: | Display text describing the dropdown information“” | N/A |
| Dropdown | AB-5 | List of CSR sites | Dropdown contains.   * Select… * Arlington (value = 19) * Bogalusa (value = 1) * Chester (value = 4) * Coralville (value = 5) * Corbin (value = 6) * Hattiesburg (value = 7) * Lawrence (value = 10) * London (value = 9) * Lynn Haven (value = 12) * Phoenix (value = 14) * Riverview (value = 15) * Sandy (value = 16) * Waco (value = 17) * Winchester (value = 18)   (Required) | N/A |
| Text | C-4 | Validate a CSR site was selected in the dropdown list. | When no CSR site is selected, display the message:  “Select a CSR site option.” | N/A |
| Text | AB-7 | 2. Select the CSR’s Name: | Display text describing the dropdown information ” | N/A |
| Dropdown | AB-8 | List of CSRs for the site. | Dropdown is built by searching user ids using location site and title of “Customer Service”. The information listed will be:   * Select… * User name * Lan id * Title   (Required) | N/A |
| Text | C-7 | Validate a CSR name was selected in the dropdown. | When no CSR name is selected, display the message:  “Select a CSR.” | N/A |
| Text | AB-9 | 3. CSR’s Supervisor Name: | Display text describing the information displayed below. ” | N/A |
| Text | AB-10 | Display supervisor’s name, Lan id and title. | On CSR Selection, field is made visible. The supervisor name stored from the CSR’s information will be used to search user ids for the following information:   * User name * Lan id * Title | N/A |
| Text | AB-11 | 4. CSR’s Manager Name: | Display text describing the information displayed below. ” | N/A |
| Text | AB-12 | Display manager’s name, Lan id and title. | On CSR Selection, field is made visible. The manager name stored from the CSR’s information will be used to search user ids for the following information:   * User name * Lan id * Title | N/A |
| Text | AB-4 | 5. Select the appropriate program for this coaching: | Display text describing the dropdown information“” | N/A |
| Dropdown | AB-12 | List of program options | Dropdown contains.   * Select… * Marketplace * Medicare   (Required) | N/A |
| Text | AB-13 | 6. Will you be delivering the coaching session? \* | Display text describing the information displayed below. ”  (Required) | 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/Z |
| Text | C-13 | Validate a coaching session option was selected. | When no coaching session option has been selected, display the following message:  “Select a CSR.” | 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 |
| Button | A-16 17 | Display the “Next” button to load the second panel of information. | On select, hides panel 1 and displays panel2 or panel 3 depending on response to question #5.  Button is disabled until all required fields have been updated. | N/A |
| Text | B-16, 17 | Display text explaining the why the button is deactivated. | Display: “Note: Button will activate when all fields have been completed.” | N/A |
| Display in Informational Display section | | | | |
| Text | F1 | Page: Start [1 of 2] |  | N/A |
| Text | F2 | Status: New |  | N/A |
| Text | F3 | Date Started: [date] | Display “Date Started:“ followed by current date. | N/A |
| Image | F20 | eCL logo displayed in the lower right corner of the panel | Display the “eCL” logo | N/A |
|  | | | | |
|  | | | | |
| Display The following when Panel 2 “5. Will you be delivering the coaching session?” is “Yes”. | | | | |
| Text | AB-4 | 1. Enter/Select the date of coaching: \* | Display text describing the date field | N/A |
| TextBox | AB-5 | [Date2] | Text box for Date in the format “mm/dd/yyyy”.  May be selected by the pop-up calendar.  (Required) | N/A |
| Image | C-5 | [Calendar\_scheduleHS.png] | Calendar object opens when the image is selected. | N/A |
| Text | C-4 | Validate a date was entered. | When invalid date is entered, display the message:  “Enter a valid event date.” | N/A |
| Text | AB-6 | 2. What type of coaching are you doing today? **\*** | Display text describing the dropdown information | N/A |
| Dropdown | AB-8 | Selection list of the type of coaching that will be given. | Dropdown list with the following options:   * Select… * Manager Coaching * Quality Specialist Coaching * Supervisor Coaching   (Required) | N/A |
| Text | AB-7 | Validate a selection was made from the dropdown. | When no type of coaching is selected, display the message:  “Please select the type of coaching you are doing today.” | N/A |
| Display in Informational Display section | | | | |
| Text | F1 | Page: Direct Entry [2 of 2] |  | N/A |
| Text | F2 | Status: New |  | 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 | CSR: [CSR displayName] | Display “CSR:“ followed by selected CSR 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 |
| Image | F20 | eCL logo displayed in the lower right corner of the panel | Display the “eCL” logo | N/A |
|  | | | | |
|  | | | | |
| Display The following when Panel 1 “5. Will you be delivering the coaching session?” is “No”. | | | | |
| Text | AB-4 | 1. Enter/Select the date of event: \* | Display text describing text field | N/A |
| TextBox | AB-5 | [Date1] | Text Box for Date in the format “mm/dd/yyyy”.  May be selected by the pop-up calendar.  (Required) | N/A |
| Image | C-5 | [Calendar\_scheduleHS.png] | Calendar object opens when the image is selected. | N/A |
| Text | C-4 | Validate a date was entered. | When invalid date is entered, display the message:  “Enter a valid event date.” | N/A |
| Display in Informational Display section | | | | |
| Text | F1 | Page: Indirect Entry [2 of 2] |  | N/A |
| Text | F2 | Status: New |  | 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 | CSR: [CSR displayName] | Display “CSR:“ followed by selected CSR 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 |
| Image | F20 | eCL logo displayed in the lower right corner of the panel | Display the “eCL” logo | N/A |
|  | | | | |
|  | | | | |
| Display The following for both. | | | | |
| Text | AB-6 | 2. Is thjs a Customer Service Escalation (CSE)? \* | Display text describing the information displayed below. ”  (Required) | N/A |
| Radio | AB-6 | Linked radio buttons to allow one selected. | Select one of the following options. (Required)   * **Yes** * **No** | N/A |
| Text | AB-6 | Validate a CSE option was selected. | When no CSE option has been selected, display the following message:  “Indicate whether this is a CSE or not.” | N/A |
|  | | | | |
| Text | AB-21 | 3. Select the type of coaching from the categories below: \* | Display text describing the radio button section ” | N/A |
| Text | AB-22 | Coaching Reasons | Display text ” | N/A |
| Display the following if question #2 is “Yes” | | | | |
| Checkbox | A-23 | Customer Service Escalation | Disabled checkbox | N/A |
| Dropdown | AB-23 |  | Dropdown contains.   * Enters authorization error compromising PHI (Value = 2) * Argues (Value = 3) * Yells, Screams (Value = 4) * Uses Profanity of any kind (Value = 5) * Uses derogatory/disrespectful words (Value = 6) * Threatens caller (Value = 7) * Intentionally disconnects caller (Value = 8) * Encourages fraud (Value = 9) * Verbally abusive (Value = 10) * Blind transfers call (Value = 43) * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-23 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
|  | | | | |
| Display the following if question #2 is “No” | | | | |
| Checkbox | A-23 | AHT (Average Handling Time) | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-24 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-23 |  | Dropdown contains.   * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-23 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | AB-24 | ARC Issue | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | DE-24 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-24 |  | Dropdown contains.   * Casework Adhoc requests from CMS (Value = 13) * Casework Bene Letter (Value = 14) * Casework CTM (Value = 15) * Casework Inappropriate ARC Escalation (Value = 16) * Casework ISG Escalation (Value = 17) * Complaints Research (Value = 18) * Special Projects (Value = 19) * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-24 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | A-25 | Attendance | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-26 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-25 |  | Dropdown contains.    * ETS * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A  If (user job code = ( “\*40” OR "\*50" OR “\*60” OR “WISY13”) AND (formtype = “Direct”) then  Include dropdown menu option “ETS” |
| Text | AB-25 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Text | A-25 | CCO Process Procedure Issues | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-26 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-26 |  | Dropdown contains.   * Security and Privacy Incident (Value = 1) * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-26 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | AB-33 | Current Coaching Initiatives | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-34 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-34 |  | Dropdown contains.   * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-34 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | A-27 | Feedback (CSR and Customer) | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-28 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-28 |  | Dropdown contains.   * Inappropriate NGD Feedback (Value = 11) * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-28 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | AB-27 | HR Guideline Issues | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-28 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-28 |  | Dropdown contains.   * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-28 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| checkbox | A-33 | OMR / Exceptions | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-34 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-33 |  | Dropdown contains.   * OMR: Cancelled Calls (Value = 20) * OMR: Default Qualifiers (Value = 21) * OMR: Open Calls (Value = 22) * OMR: Short Calls - Inbound (Value = 23) * OMR: Short Calls - Outbound (Value = 24) * OMR: ACW (Value = 25) * OMR: AHT (Value = 26) * OMR: BCC Security and Privacy Incident Coaching (Value = 27) * OMR: Inappropriate ACO Escalation (Value = 28) * OMR: Inappropriate ARC Escalation (Value = 29) * Exception Reporting Inappropriate Transfers (Value = 40) * Exception Reporting PDP Complaints (Value = 41) * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-33 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | A-29 | Quality | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-30 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-30 |  | Dropdown contains.   * Accuracy / Completeness (Value = 46) * Admin Procedure (Value = 47) * CSAT (Value = 12) * Customer Service (Value = 45) * Other: Specify reason under Question 4 below (Value = 42) * Privacy (Value = 44)   (Required) | N/A |
| Text | AB-30 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | AB-29 | Recognition | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-30 | One radio button selected by default. | Display the following linked radio buttons:   * Reinforcement | N/A |
| Dropdown | AB-30 |  | Dropdown contains.   * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-31 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | AB-31 | Schedule Adherence | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | DE-32 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-32 |  | Dropdown contains.   * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-32 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
| Checkbox | A-31 | . Secure Floor Violations | Dynamic trigger to display and enable corresponding dropdown menu and radio buttons | N/A |
| Radio | AB-32 | Linked radio buttons to allow one selected. | Display the following linked radio buttons:   * Opportunity * Reinforcement | N/A |
| Dropdown | AB-31 |  | Dropdown contains.   * Other: Specify reason under Question 4 below (Value = 42)   (Required) | N/A |
| Text | AB-31 | [Validate a coaching reason sub reason was selected] | When no coaching sub reason option has been selected, display the following message:  “Please select a coaching sub reason.” | N/A |
|  | | | | |
| Text | AB-39 | [Error message when no coaching sub category selected] | Display the following error message when submit is selected and no coaching category is selected:  “At least one coaching item above must be selected to continue.” | N/A |
| Text | AB-40 | 4. Provide details of the behavior to be coached: \* | Display text describing the text box entry | N/A |
| Text Box | AB-41 | Multiline text box | Freeform text box to allow the more information to be entered on the behavior being coached. | <3,000 Bytes |
| Text | AB-42 | [max length: 3,000 chars] | Display informational text for the text box | N/A |
| Text | AB-43 | 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 Panel 1 “6. Will you be delivering the coaching session?” is “Yes”. | | | | |
| Text | AB-44 | 5. Provide the details from the coaching session including action plans developed: \* | Display text describing the text box entry | N/A |
| Text Box | AB-45 | Multiline text box | Freeform text box to allow details from the coaching session to be captured including action plans. | <3,000 Bytes |
| Text | AB-46 | [max length: 3,000 chars] | Display informational text for the text box | N/A |
| Text | AB-47 | Provide as much detail as possible | Display information text for the text box | N/A |
|  | | | | |
| Display The following for both Direct and Indirect | | | | |
| Text | AB-48 | 5. How was the coaching opportunity identified? \* | Display text describing the dropdown information  Question # is 6 if Direct and 5 if indirect | N/A |
| Dropdown | AB-48 |  | Dropdown list with the following options:  If Indirect:   * Select... * CMS Reported Item(Value = 206) * CSR Reported Issue (Value = 209) * Internal CCO Reporting (Value=218) * Leadership Listening (Value = 207) * Manager Coaching (Value = 203) * Quality Call Listening (Value = 205) * Quality Specialist Coaching (Value = 201) * Supervisor Coaching (Value = 202) * Training and Development (Value = 210) * Verint Quality Monitoring (Value = 204) * Walk-By (Value = 208)   If Direct:   * Select... * CMS Reported Item(Value = 106) * CSR Reported Issue (Value = 109) * Internal CCO Reporting (Value = 118) * Leadership Listening (Value = 107) * Manager Coaching (Value = 103) * Quality Call Listening (Value = 105) * Quality Specialist Coaching (Value = 101) * Supervisor Coaching (Value = 102) * Training and Development (Value = 110) * Verint Quality Monitoring (Value = 104) * Walk-By (Value = 108)   (Required) | N/A |
| Text | AB-48 | Validate a selection was made from the dropdown. | When no CSR name is selected, display the message:  “Select the way in which the coaching opportunity was identified.” | N/A |
| Text | AB-48 | 7. Is there a Call Record associated with this coaching? \* | Display text describing the information displayed below.  Question # is 7 if Direct and 6 if indirect  (Required) | N/A |
| Radio | AB-48 | [Linked radio buttons to allow one selected] | Select one of the following options. (Required)   * **Yes** * **No** | N/A |
| Display if Call Record selection is “Yes” | | | | |
| Dropdown | AB-48 |  | Dropdown list with the following options:   * Verint * NGD ID * Avoke * UCID   (Required) | N/A |
| TextBox | AB-48 |  | Required when Call Record selection is “Yes” | N/A |
| Text | AB-48 | [Validate Call Record text] | If Call Record selection is :  "Verint" – use : RegularExpressionValidator2.ValidationExpression = "^[0-9]{10,19}$"  "NGD ID" – use :  RegularExpressionValidator2.ValidationExpression = "^[a-zA-Z0-9\-]{9,16}$"    "Avoke" – use :  RegularExpressionValidator2.ValidationExpression = "^[a-zA-Z0-9\_]{24}$"  "UCID" – use :  RegularExpressionValidator2.ValidationExpression = "^[a-zA-Z0-9]{26}$" |  |
|  | | | | |
| Text | AB-48 | [Validate a call record option was selected] | When no call record option has been selected, display the following message:  “Please select a call record type for this coaching.” | N/A |
| Checkbox | AB-48 |  | 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 |
| Text | C-49 | Text for the loading image | Display “Please wait for the eCoaching Log to submit. Do not close this window until you see a new form load” 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 |
| 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 |
| 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.” | N/A |
|  | | | | |
|  | | | | |
|  |  |  |  |  |

## Data Flow Diagram

Coaching Log DB

Coaching Log Information

## Database

The eCoaching Log application will be dependent on a Microsoft SQL Server Database application server.

# Data Flow Diagram

## eCoaching Retrieve process

eCoaching Log DB

Start

eCoaching Log Web App

# Includes

## eCL Stylesheet (site.css)

body

{

background: #ffffff;

font-size: .80em;

font-family: Calibri;

margin: 0px;

padding: 0px;

color: #000000;

border: none;

}

.formButton

{

font-weight:700;

font-size:.7em;

color:#ffffff;

font-family:Tahoma;

background-color:#507CD1;

text-align:center

}

.subuttons

{

width: 150px;

height: 35px;

font-family: Calibri;

font-size: 12pt;

font-weight: bold;

color: #000000;

padding-top: 6px;

padding-bottom: 6px;

}

.tboxes

{

border: 1pt #bfbfbf;

padding: 1px;

width: 450px;

height: 100px;

}

.question

{

font-family:Calibri;

font-size: 12pt;

font-weight: bold;

color: #000000;

padding-top: 6px;

padding-bottom: 6px;

}

.description

{

font-family:Calibri;

font-size: 10pt;

font-weight: normal;

color: #000000;

padding-top: 6px;

padding-bottom: 6px;

}

.qcontrol

{

font-family:Calibri;

font-size: 12pt;

font-weight: normal;

color: #000000;

}

.crquestions

{

font-family:Calibri;

font-size: 10pt;

font-weight: bold;

color: #000000;

padding-top: 0px;

padding-bottom: 0px;

}

.

.croptions

{

font-family:Calibri;

font-size: 10pt;

font-weight: normal;

color: #000000;

padding-top: 0px;

padding-bottom: 0px;

}

.footer

{

font-family:Calibri;

font-size: 10pt;

font-weight: normal;

color: #3f3f3f;

padding-top: 5px;

padding-bottom: 5px;

}

.footlink

{

text-decoration: none;

border-bottom:1px solid #3f3f3f;

color: #3f3f3f;

}

.question2

{

font-family:Calibri;

font-size: 12pt;

font-weight: normal;

color: #000000;

padding-top: 6px;

padding-bottom: 6px;

}

.alink

{

color: #000000;

text-decoration: none;

font-size: 10pt;

font-weight: 100;

font-family: Verdana;

}

.warning

{

font-size: 2em;

font-family: Arial, Helvetica, sans-serif;

text-align: center;

}

.sidelabel

{

font-size: 10pt;

font-family: Calibri;

font-weight: bold;

color: #000000;

padding-top: 6px;

padding-bottom: 6px;

}

.sidetext

{

font-size: 10pt;

font-family: Calibri;

font-weight: normal;

color: #000000;

padding-top: 6px;

padding-bottom: 6px;

}

.sidetext2

{

font-size: 8pt;

font-family: Calibri;

font-weight: normal;

color: #000000;

}

p

{

margin-bottom: 10px;

line-height: 1.6em;

}

.style73

{

font-size: .7em;

font-family: Calibri;

}

.warning

{

font-size: 2em;

font-family: Calibri;

text-align: center;

}

.lview

{

font-size: .8em;

}

.TextBox

{

border-right: #d4d0c8 .1em solid;

border-top: #d4d0c8 .1em solid;

font-size: .8em;

border-left: #d4d0c8 .1em solid;

color: #000000;

border-bottom: #d4d0c8 .1em solid;

font-family: Calibri;

background-color: white;

}

/\* HEADINGS

----------------------------------------------------------\*/

h2

{

font-size: 1.5em;

color: #666666;

font-variant: small-caps;

text-transform: none;

font-weight: 200;

margin-bottom: 0px;

font-weight: 600;

}

/\* PRIMARY LAYOUT ELEMENTS

----------------------------------------------------------\*/

.page

{

width: 1200px;

background-color: #fff;

margin: 5px auto 0px auto;

border: 1px solid #496077;

}

.header

{

position: relative;

margin: 0px;

padding: 0px;

background: #ffffff;

width: 100%;

top: 0px;

left: 0px;

}

.top

{

font-size: 2.6em;

margin-top: 25px;

padding-top: 25px;

padding-bottom: 0px;

margin-bottom: 0px;

vertical-align: bottom;

width: 503px;

}

.main

{

padding: 0;

margin: 0;

min-height: 420px;

}

/\* TAB MENU

----------------------------------------------------------\*/

div.hideSkiplink

{

background-color: #F9F9F9;

color: #ffffff;

width: 100%;

}

/\* MISC

----------------------------------------------------------\*/

.clear

{

clear: both;

}

.title

{

display: block;

float: left;

text-align: left;

width: auto;

}

.EMessage

{

font-size: 1.2em;

color: Red;

}

.tablestyle

{

font-family: Calibri;

}

.tablestyle td, .tablestyle th

{

}

.alternatingrowstyle

{

}

.headerstyle a

{

text-decoration: none;

color: #ffffff;

}

.rowstyle

{

}

.rowstyle td, .alternatingrowstyle td

{

}

.headerstyle

{

background-image: none;

text-align: left;

color: #ffffff;

font-size: .9em;

}

.sortascheaderstyle

{

text-decoration: none;

background-image: url(../images/sort\_asc\_alt.png);

background-repeat: no-repeat;

background-position: left center;

padding-left: 20px;

font-size: .9em;

}

.sortdescheaderstyle

{

text-decoration: none;

background-image: url(../images/sort\_desc.png);

background-repeat: no-repeat;

background-position: left center;

padding-left: 20px;

font-size: .9em;

}

.sortascheaderstyle a

{

text-decoration: none;

}

.sortdescheaderstyle a

{

text-decoration: none;

}

.dashHead

{

font-size:14pt;

font-family:Calibri;

color: #0099FF;

}

.nodata

{

font-size:8pt;

font-family:Calibri;

}

.review

{

margin-bottom: 5px;

}