

Passageways Consulting

Awards Module Specifications

For: Purdue Federal Credit Union

Version 1.0
3/8/2016

* This document is intended for use by current Passageways employees, clients and partners and may contain legally privileged and/or confidential information. If you are not the intended recipient to view or possess this document you are hereby notified that any dissemination, distribution or copying of this document is strictly prohibited.

Project Description

Purdue Federal Credit Union is looking to build a new application to replace their current Support Star module. The new application will provide all the current capabilities of the Support Star module but will provide the extended ability to handle multiple award types and categories. The system will provide the ability to setup different awards for nomination, voting, and automatically selecting and displaying the winners. This document outlines the specifications this new application will provide based on the requirements provided from Purdue Federal and project discussions between Passageways and PFCU. Mockups screens are also provided in the supplemental PDF document.

1 Award Categories

1.1 Manage Categories Admin Page

Description: An admin page will be available to create award categories. This will be used when you create a new award to select a category that it belongs to. While creating a category you will be able to set permissions to assign certain users or roles that will have the ability to create awards under the category. If a user does not have permission to create an award for a category then they will not be able to create awards. Refer to mockup page 1.

2 Award Categories

2.1 Manage Awards Admin Page

Description: An admin page will be available where all the awards will be created. The page will display a list of all the active awards that are currently in the nomination or voting periods. Once the voting period passes the award will automatically go into the Archives/Closed Awards. From this admin page you will be able to view all archived/closed awards. There will also be an option to copy an award that will open the create form with the fields prepopulated with the same content from an existing award. Refer to mockup page 2.

2.2 Create a New Award

Description: From this admin page you will be able to create the awards. The award will consist of the nomination, approval, and voting stages. While creating an award all the properties will be configured for the users/roles that are the award owners, users/roles eligible for nomination, users/roles able to submit nominations, users/roles needed to approve the nominations, and users/roles that are able to vote. You will also configure the nomination and voting periods; as well as identifying if the respective roles will receive an alert when the corresponding nomination/voting period end date is reached. A separate admin page will be available to configure the message of these alerts. Below is a description for each of these properties. Also refer to mockup page 3 for the Award Form.

1. Owners – users/roles that will be able to edit the details of the award. All owners will see this award when they open the Manage Awards admin page
2. Eligible For Nomination – users/roles that will be available to select for submitting a nomination for this award. If a user is not set here, they will not be able to be nominated.
3. Nominating Roles – users/roles that are able to submit the nominations for users that are eligible for nomination for the award.

4. Approvers – users/roles that will need to approve the nominations submitted by the nominating roles. Once the approval is completed the award will be opened for voting.
5. Nomination Period – this is the date range that the nominating roles can submit their nominations. Once this period ends, nominations cannot be submitted and the approval will be opened.
6. Send Nomination Closed Alert – select whether the Award Owners will receive an alert when the Nomination Period closes.
7. Voting Roles – Users/roles that will be able to submit votes for the winner of the award. If a user is not set in the voting role they will not have access to vote for the award.
8. Voting Period – this is the date range that the voting roles can submit their votes for the award. The voting period will be locked until the approval is completed. Once the voting period ends users can no longer submit votes and the winner will be automatically generated.
9. Send Voting Closed Alert – select whether the award owners will receive an alert when the Voting Period closes.

2.3 View Archived Awards

Description: Once the voting period ends the award will automatically be archived and removed from the main grid of the Manage Awards admin page. A button will be provided in the page toolbar to view the Archived Awards. This button will navigate to a new page where you can view the list of all archived awards. Refer to mockup page 4.

3 Nomination Closed Alert

3.1 Manage Nomination Closed Alert Admin Page

Description: An admin page will be available to configure the subject and body for the Nomination Closed alert. The alert subject will be a text field. The alert body will be a portal text editor. This will be global alert sent to users in the Award Owners of the award if the “Send Nomination Closed Alert” is set to True. The alert will be sent at 11:59pm on the nomination close date. Refer to mockup page 5.

4 Voting Closed Alert

4.1 Manage Voting Closed Alert Admin Page

Description: An admin page will be available to configure the subject and body for the Voting Closed alert. The alert subject will be a text field. The alert body will be a portal text editor. This will be global alert sent to users in the Award Owners of the award if the “Send Voting Closed Alert” is set to True. The alert will be sent at 11:59pm on the voting close date. The winner of the award will be appended to the bottom of the voting closed alert by default. Refer to mockup page 6.

5 Active Awards Workflow

5.1 Workflow

Description: Once an award is created it will follow a consistent workflow for every award. The workflow will consist of creating the award, through the nomination and approval stage, then to open voting, and finally to the voting closure and winner being selected. Below is a description of the functionality of each stage.

1. Create Award – the award will be created from the Manage Awards admin page. All the details of the award will be set here to define when the nomination and voting stages will begin and end for each award. The people responsible for executing each stage will also be set during this part of the workflow.
2. Nomination Period – Once the nomination period is started based on the Nomination Period Open date, the award will become available on the Nomination Island. Anyone set in the Nominating Roles will see the award on this island and be able to submit their nominations. Once the nomination period ends, the award will no longer be visible on this island.
3. Approval – A separate island will be available for approving the nominations for all awards. During the nomination phase the awards will display on the Nomination Approval island. Users will only see the awards in which they are set in the Approver field. The approval action will be disabled during the approval process but they will have access to view the current submitted nominations. Once the nomination period ends, the approval for the award will be unlocked. The approvers will receive an alert that the nomination period has ended and the approval needs to be completed before voting will open.
4. Voting Period – Another island will be created for all voting actions. Once the approval is completed the award will display on this island for all users set in the Voting Roles field of the award. From here they can select to view the nominees for the award and submit their vote. Only 1 nominee can be selected per award and only 1 vote can be cast for each award. Once a user has submitted a vote a message will be displayed for the award notifying the user their vote has been received.
5. Winner – Once the voting period ends the system will automatically generate the winner of the award based on the nominee that received the most votes. When the voting period closes the winner of the award will be included by default in the Voting Closed Notification that is sent to the Award Owners if the alert is enabled for the award. Reports will be available to view all winners and nominees that received votes for all awards.
6. Archived/Closed Voting – Once the voting end date is reached and the winner is selected the award will be archived. The award will be available to review through the reports and the award details can be reviewed from the Archived Awards page accessed from the Manage Awards admin page.

6 Submitting Nominations

6.1 Nomination Island

Description: An island will be created for all users in the Nominating role to access the awards they are assigned to. The island will display a list of all these awards and provide a button to open the Nomination form. The awards will be available only during the Nomination period. Once the nomination is closed the award will go off the island. If no active nominations are available for the user they will see a message for the same instead of a list of active awards.

6.2 Nomination Form

Description: Nominations will be submitted by opening the nomination form for the award available on the island main page. The nomination form will consist of 2 fields.

1. Select Nominee: Dropdown field that will contain only the users set in the “Eligible Nominees” field for the award. Only 1 user can be nominated per submission.
2. Message: Text box field to input the reason why you are nominating the person for the award. This will be a required field.

Multiple nominations can be submitted for any award. If a user has already submitted a nomination for the award they will see a message on the nomination form letting them know they have already submitted a nomination and for which user(s).

Refer to mockup page 7.

7 Nomination Approval

7.1 Nomination Approval Island

Description: An island will be created for all nomination approvals. The island will display a list of all active nominations that the user is set in the “Approver” field for an award. The award will become available on the island on the Nomination Period open date. During the nomination period the approval will be locked and the approver will only be able to view the current nominations submitted for the award. Once the nomination period close date is reached the Approval will be unlocked. If no awards are currently active the user will see a message for the same instead of seeing a list of the active awards. The award will fall of this island once the approval has been submitted. Refer to mockup page 8.

7.2 Approval Form

Description: Once the nomination closed date is reached the nominee page will unlock to select the final nominees and submit the approval to open the voting. The approval form will contain a list of all the submitted nominations, along with the details for the message and user that submitted each nomination. The approver will check each nominee if they are approved or declined. It is possible a multiple nominations were submitted for a user by different people. In this case the approver will be able to individually select each nomination message for approval that will determine which message will display on the voting ballot for the nominee (all messages can be approved if desired to display all messages on the voting ballot for the nominee).

If a nominee is declined they will need to fill out the “reason for declining” before the approval can be submitted. The declined reason field will be validated upon submitted approval and a message will be shown if any fields were left blank for nominees not approved. Upon submitted the approval a confirmation step will be provided. After clicking the submit button on the approval form, the user will be directed to the confirmation page. The confirmation page will display the following message:

“Are you sure you want to save these changes and open voting?
Once saved, nomination approvals cannot be changed”

Two buttons will be available on the confirmation page. One button to cancel and return to the approval form. The other button to Confirm and Open Voting. After the approval is confirmed no changes can be made to the final nominees that will be available for the voting of the award. Only the approved nominees will be available on the voting ballot for the award. The voting is only allowed to be open if the approval is completed. If the voting period open date has started without the approval completed, the award will not display for the voters to begin submitted their votes.

Refer to mockup page 8.

8 Award Voting

8.1 Voting Island

Description: An island will be created for users to submit votes for all active awards. The island will display a list of all the active awards that are within the Voting Period (and approval has been completed) where the user is set in the “Voting Roles” for the award. If no active awards are available for the user a message will be displayed for the same. A button will be available for each award item to open the voting ballot for the award.

Only one vote can be submitted for each award. If a user has already submitted a vote they will see the message their vote has been received for the award instead of seeing the button to open the voting ballot.

Refer to mockup page 9.

8.2 Voting Ballot

Description: A button will be available next to each award item displaying for the user to open the voting ballot. The ballot will display a list of all the final nominees along with the approved messages submitted for each nominee. The user will select which nominee they would like to vote for then submit their ballot. A confirmation message will be displayed once their vote has been submitted. Refer to mockup page 9.

9 Reporting

9.1 Award History Report

Description: A report will be available to view the history of all awards. This report will be a broad report to view the details of active and archived awards. You will be able to pull a report by a certain category, a specific award, date ranges based on the created date, date ranges based on nomination or voting periods, current stage of awards (i.e. Nomination or Voting), or who winners were. This report can be exported to excel.

This report will generate a list of the awards based on the search criteria you select. From the results you will be able to dig deeper into the details of the award. You will be able to get the details of the following information of the report:

1. Award Name
2. Category
3. Award Description
4. Created Date and who created it
5. Nomination and Voting Periods
6. Final Nominees – list of all the approved nominations, who submitted them, and the message for the nomination.
7. The # of Votes received for each nominee
8. Who the winner of the award was.

9.2 Approval Audit Trail Report

Description: A report will be available to provide an audit trail of the nomination approval. This report will provide a list of all the submitted nominations for an award along with the final approval details, including any reasons for declining the nomination. Details will be provided for who completed the approvals and the dates the approvals were confirmed. This report can be exported to excel.