

Subscription Management Requirements & Scope

1. Project Description

The goal for the project will be to: Replace Press+ and Synchronex with MPP(eSuite) SaaS as our paywall and subscription manager on all digital devices (laptop, mobile phone, tablet) and web browser and mobile web browser.

The reason for the change: The current vendors are costing a little over \$6k per day and offer very little flexibility for our subscribers or for our markets to promote subscriptions sales.

Goals for customers: Reduction of screens needed to purchase a digital subscription.

Additionally activating or creating an account should involve fewer screens for subscriber. It is also critical to begin enabling the ability for users to make an in-app subscription purchase.

MPP is the new vendor-of-choice for implementing a paywall and members center solution.

Implementing MPP for our enterprise will provide greater flexibility and allow audience development to have control over several key aspects of our business. Thru the MPP

dashboard, the audience team will have the ability to raise and lower paywall thresholds, create new products for purchase and create landing pages and offer special promotions on the fly.

This removes barriers and issue that the company currently encounters with our existing vendor tools, which require intervention from the vendor for price changes, increases and decreases to paywall thresholds, implementing special promotions. Additionally, this allows for flexibility in making changes to landing pages that won't require development work. The platform will also allow us to manage of business rules without the need to have the vendor make the changes for us.

Long-term, the overall system of which MPP is a part needs to support the ability for our business to gather and parse data about our audiences and to better understand our customer's preferences so that we can provide finely targeted content, customer support, as well as have the data necessary to build and create products and services with will be of use to the communities that our markets serve.

2. Definitions

Term	Definition
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Billing	Credit card payments will go via Edgil. Billing is any monetary transaction not just recurring payments.
Inactive Account	expired or stopped account. For purging
Auto-renew	Confirm: Digital only- web purchases - uses credit/debit card. EZPay is another term for auto-renew. User payment can be adjusted through this process. A new bill and payment is scheduled each cycle.
Recurring payment	Confirm: Credit/Debit card payment with a set price that is charged each cycle. Payment increases need to be re-billed and accepted by customer.
Validation	
Voice Port	A customer service tool for users to update account information via a robo-call interface.
Lite User	Users with an unpaid digital account. A user can have a single sign-on lite account for managing loyalty points, newsletters or any other free service.
Subscriber	Users with a paid digital or combo account. An active digital subscriber account can manage all the lite account services as well as their paid subscriptions from their single sign-on account.
Combo Subscriber	A subscriber who also receives home delivery
Digital Only Subscriber	A subscriber that only accesses our products via web and apps.
Visitor	Users who come to the site but who do not have any type of account.
Activated Subscription	A subscriber who has purchased his subscription somewhere other than the website, will need to go online in order to activate digital access. Note: Users don't respond well to the term 'activate'
Member Center	<p>The section/page on the website where a user can manage all their subscriptions; free and paid.</p> <p>Loyalty program, print subscription, internal and external sales, digital subscriptions, email newsletters and push are some of the accounts that can be managed from this location.</p>

3. Assumptions & Constraints

- Billing for any customer who currently has or who has ever had a print subscription will be handled from NCS.
 - Combo subscriptions will be billed through NCS.
 - Any cancellation of a combo to a digital only will be billed through MPP. You are stopping in NCS billing and starting billing in MPP. (This is not the digital entitlement or digital account records being created new)
- Billing for any digital customer will be handled from MPP - Customers being billed via NCS should remain so for phase 1.
- McClatchy will be hosting the templates for the marketing pages/landing pages and we will need to detail the configurations and flow for capturing users as they go through the purchase process.
- Anyone being billed through MPP will be on an auto-pay solution (notifications are credit card expire etc.) McClatchy will handle the notifications for users
- Both NCS and MPP will use Edgil as a payment processor
- MPP will be responsible for integrations with Edgil, Janrain (for social sign on) [three max to start] and Olive
- McClatchy will be responsible for the NextBee integration
- User can sign on or sign up via social media channel (JanRain/MPP integration)
- All subscriptions will include a digital subscription. Users can add or remove print at any time.
 - Digital only can upgrade to include a print component
 - Digital only can't downgrade to print only
 - Print-only customers can upgrade to digital combos
 - Print-digital combo cannot downgrade to digital only - it triggers a new subscription in MPP. (What happens to their end date of their subscription? Cancelled March 3 - your new subscription starts March 3 with MPP.)
 - Print-digital combo is not allowed to downgrade to print only.
- MPP will manage billing for digital only accounts [if that customer adds print it will have to be billed via NCS]
- We will need to manage the rate codes and matching needs with MPP/NCS as we build the product set-up (Document scenarios on this -- will become detailed test case scenarios)
- We will allow in-app subscriptions via iTunes store for iOS apps. Android apps will go through a browser flow for MPP digital purchase flows. We will not be allowing combo purchases through iTunes to avoid the 30% of print subs. We will detail a reverse bundle flow.

- Markets will roll out in waves which are region based. The entire region will be moving off Press+ at the same time. We will manage the customer service needs by throttling the threshold for subscription.
- Press+ and Synchronex will need to continue to be supported until all markets are rolled out. (Question: Perhaps we can include all Synchronex markets in wave 1 so that we can drop support for at least one platform at launch? [This won't be possible due to the regional rollouts.](#))
- Only Escenic sites will be supported at launch.
- Existing print-only, digital-only, and print-digital combo customers retain existing username(customer's email address) but will need to create a new password.
- Existing print-only, digital-only, and print-digital combo customers retain existing subscription levels and end dates.
- We do not want everyone to get hit with the MPP login on the day we switch to mitigate the hit on the customer service team. We want to throttle the amount of customers that are required to login at any given period. (Maybe we will leverage the Press+/Synchronex cookie, which is a first party cookie, to maintain customer log-in information during the transition periods.)
- Shibboleth access will continue to work for State College market. We are responsible for this integration (if integration is needed). It is our understanding this is a McClatchy server-side integration.
- Print-only customer records should not be included in MPP (these people are not eligible to activate their subscription because they are adamant that they do not want digital access). These users may still be paying a different rate than combo subscribers do currently. For print only users to upgrade, they must do so through the customer service call center.
- NCS is the financial system against which all subscription purchases are audited.
- Current active digital accounts will get migrated to MPP by MPP, coming from Press+ and Synchronex. Kansas City has about 5k to 7k set of subscribers that are managed digitally through an outside vendor -- those get added in the nightly file to Press+ - payment comes from authorize.net or cybersource. Monthly or annually recurring subs. There may be other back door situations at other markets we are not aware of.
- We will be offering "free accounts" for employees or key partners/advertisers that we give free access to. We will still need business sales bundles (by IP address -- could it be by email or a paid group?) for specific companies as well.
- We will need some ability to monitor concurrent devices by users and have the ability to set the number of devices by subscription/user to help combat fraud.
- Inactive or expired account data will NOT be migrated by MPP
- The MPP account will grant access to the Olive e-edition.
- MPP will handle Olive integration (web and apps?)
- Must be able to validate delivery address for combo subscription
- User will have immediate access to their account and products that they have purchased. We do not want wait periods for accessing digital entitlements/account after a user makes a purchase.

- A single account is only allowed to have five concurrent devices logged in at one session

4. Scope

Out of Scope

- Sites not using Escenic
- Print-only purchases from within apps, browsers
- Inactive or expired account migration
- Current version of our apps will not integrate with MPP, but will be integrated with the new universal apps.
- Print subscriptions are not available for purchase in iOS apps

In Scope

- Purchases for digital-only and print-digital combo via web, apps, kiosks, and phone (support center)
- Self- Service Cancellations with refunds via the web. We want the ability to require all cancellations to go through call center and also have the ability to allow them to cancel online – we need the business ability to do both. This includes offering free trials with or without a credit card up front.
- Print subscriptions are available for purchase in Android apps.
- Renewals for print-only, digital-only and print-digital combo via web, apps, kiosks, and phone (Are renewals automatic? [Market-based decision so will need to have the four autorenewal options available](#))
- Auto Renewals
 - all digital only subscriptions through the web are auto-renew
 - combo purchase through the web -- it is configurable so that some markets have it to set for a 6 month term etc. now. It could be a flexible subscription period (6 month or 12 month subscription) with auto-renewal. It is also configurable per individual the choice to have auto-renewal or not.
- AutoRenew is available and configurable on market-by-market basis (i.e. defaulted on, user opts-in, defaulted to off).
 - All four AutoRenew types are available: Forever, Off by Default, Limited, Until End Date
 - Renewal Retry rules can be configured by markets - default allows a 12 hour wait that extends the user's entitlements over those 12 hours and maintains their original billing date if the retry is successful.
- Print and print-digital combo subscribers can manage delivery address and vacation stops via web, apps, and phone (support center)

- Paywall and metering enabled for websites, main apps, niche apps that are already under our existing paywall solutions.
- Paywall metering on websites and in apps functions in similar manner to Press+/Synchronex regarding pages/section inclusions and exclusions for metering
- NextBee integration ([NextBee Loyalty Program Requirements & Scope](#))
- Gift subscriptions - for both digital only and print/digital combo.
- Promo codes - digital only in phase 1 and print/digital combo in phase 2(NCS promo codes for print)
- Recurring payments are NOT enabled - it is true auto-renew to charge credit card each month
- Market can configure the Contract length at a product or offer level and at an individual account level (two free weeks added) (i.e. length of time for a subscription)
- Markets can set a payment schedule - Fixed and dynamic (phase two for Mather Listener)
- Terms of service (TOS) must be selected to create an account [both paid and light accounts] and it cannot be pre-checked for the user.

5. Scenarios

These are the scenarios that we need to handle in the initial launch, covering what we know today, expanding upon what is in the “in scope” section. Elaine has started this (and Paul and I have given some input), but there are still many more we need to capture, and many open questions. I’d also like to see them numbered, named, and prioritized (P1, P2, P3). P1’s would be must-haves for the first wave to launch, P2’s could be things we’d like to have for the first launch, but aren’t willing to move launch dates for, and P3’s would be things to come in later releases.

P1 items:

Accounts

Digital-only subscribers

01 - Moving users from Press+ or Synchronex to MPP (V1)

June is a digital subscriber on the Fresno Bee website. She received an email about the change in the subscription manager, but didn’t do anything. Now, she’s encountering the paywall page. She needs a way to log into her migrated MPP account so she can continue reading.

02 - Subscribe as digital only (V1)

Jeremy sees an ad on his Facebook news feed that offers a deal to subscribe to the N&O's digital products. After clicking on the ad, he is taken to a page and chooses the digital only subscription option. He is then taken thru a step-by-step process to subscribe and can see where he is in the checkout flow thanks to an indicator. Once Jeremy's credit card payment has been processed he received a thank you message confirming his digital only subscription.

03 - New Subscriber data

As a user going through the subscription process, I want the system to remember the information I submit from screen-to-screen, so I don't have to enter the same data twice in a single subscription process.

04 - Upgrade digital subscription to combo

Martha has been a digital subscriber of the Observer for some time. She sometimes buys the Sunday paper from the newsstand so she can get the weekly circulars and coupons. She needs a way to upgrade her existing account into a full digital and home delivery combo subscription. When Martha goes to add the Sunday print to her subscription she notices that the TV guide can also be purchased for a small fee so she adds that to her order. Her subscription now includes digital, the Sunday print and TV guide. After talking to a buddy at work she discovers that Observer also has a special publication on the Panthers so she goes back to her account and adds the Panthers special get ready for football print publication. She now has digital, the Sunday print, TV guide and Panther football publication.

05 - Digital only account auto-renews (V1)

Julie has a digital only account. Her subscription will automatically renew and her payment method will be charged when her subscription date rolls over.

06 - Digital only user wants to cancel subscription (V1)

Julie has decided that she no longer wants her subscription to the Merced Sun-Star. She needs a way to contact customer service to cancel her subscription.

07 - Buying a digital-only subscription via iTunes (reverse bundling)

Buying a digital-only subscription via iTunes (reverse bundling + pairing with web account)

Bob has downloaded the Charlotte Observer app on his iPhone and wants to be a digital-only subscriber. He needs a way to make an in-app purchase via his iTunes account so that he can

have unlimited access to the paper's content on his iPhone, iPad and on The Observer's website.

*** See MPP Document > Option C > Step 6 > Option 3A*

08 - Cancel digital-only subscription on iTunes

Kate has cancelled her iTunes digital-only subscription of The Olympian. She needs to still be able to log in onto her Olympian app and the website so that she can remain a lite user and be enrolled in the loyalty program.

09 - Restoring digital-only subscription from iTunes purchase

Richard has bought a 1-year iTunes subscription of The News and Observer. He has just bought a new iPad and needs to restore his iTunes subscription on the N&O app and be logged into the member center so that he can continue reading the news on his tablet.

Print-only subscribers

10 - Print Subscriber information account activation (V1)

John is a print subscriber. He has gone online and activated his new 'plus' account. He got an email telling him about the new subscription manager feature on his Modesto site. He needs to know that when he clicks on the link, that we've found his account and he can safely activate his information with the new vendor.

11 - Print subscriber wants to manage print account online (V1)

Joanne is a print subscriber who rarely goes online to read news. She's never activated her account with Press+, but has gone to the site for help with her delivery. She needs a way to continue using the site to manage her print subscription, so she can feel that we value her business.

12 - Print only subscriber wants to upgrade to Combo

Fran is a print-only subscriber who recently received a tablet from her kids as a gift. While browsing the web on her tablet browser, she comes across the Island Packet's website and hits the paywall. Since Fran is now interested in having access to the Island Packet online, she needs a way to upgrade her account to a digital-print combo

13 - Print only subscriber wants to upgrade to digital only

Francie is a print-only subscriber who recently received a tablet from her kids as a gift. Francie finds that she is spending more time online and is not reading her print paper. She decides that she would like to change her subscription to digital only. Francie needs to be able to contact the customer service center in order to change her subscription.

14 - Print only user wants to cancel subscription (V1)

Julie has decided that she no longer wants her subscription to the Merced Sun-Star. She needs a way to contact customer service to cancel her print subscription

Combo subscribers

15 - Print-Digital combo subscriber need to validate account (V1)

George is a Sunday only delivery subscriber, but he reads the e-edition every day. He needs a way to validate his account with MPP so he can continue having access to that app

16 - Olive Validation (V1 - Work done by Olive)

George is a Sunday only delivery subscriber, but he reads the e-edition every day. He opens his e-edition app on his tablet and is met with the login screen. He needs a way to log into his migrated MPP account so he can continue reading.

17 - New subscriber activation - Kiosk purchase (V1)

Jack purchased a print subscription from the Kiosk at the mall. They didn't mention much about digital access when he was signing up, but he does use the site quite often. He just hit the paywall screen and isn't sure what to do. He needs to be directed to the activation process, so he can have full access to content.

18 - New subscriber activation - Kiosk purchase includes an email address (V1)

Jane purchased a combo subscription from the Kiosk at the mall. During the purchase process, she provided her email address. Jane receives an email to activate her digital account. When she clicks a link in that email, she is taken to the market site and her account is recognized.

19 - Subscribe as a combo package (V1)

Ginger sees an ad on her Facebook news feed that offers a deal to subscribe to the N&O's digital products. After clicking on the ad, she is taken to a landing page but sees an option to receive the print newspaper in addition to the digital products. She opts for this combo package and is then taken thru a step-by-step process to subscribe. She can see where she is in the checkout flow thanks to an indicator. Once Ginger's credit card payment has been processed she received a thank you message confirming his digital only subscription.

20 - Existing subscriber gets a price increase

Renee helps all the markets in the southeast with marketing to existing and new subscribers. She has been asked to increase the price to all the markets in her region to 15.99. She needs a way for this to happen in the system without requiring any action on behalf of her subscribers. She will of course notify them at least 30 days before the increase, but the current subscribers should just see the increase in the price.

21 - Combo customer activates a subscription from a browser. (V1)

Walter is reading about his favorite team (the Carolina Hurricanes) on the Charlotte Observer. After reading a handful of articles, he is interrupted by a message indicating he must register, login or activate an existing subscription. As an existing subscriber, he selects the activate option and after providing his email address, prompts the system to send him a password reset link. He opens his email account, clicks on the reset link inside of the password reset email, and is taken to a page to reset his password. Having successfully reset his password, he is immediately returned to the last article he attempted to access.

22 - Downgrade from combo account to digital only (V1)

Sheila has been a print subscriber for years. She finds that she spends more and more time reading news on her phone and computer, where she earns loyalty points, and really doesn't like having so much newspaper in her recycling bin. She needs a way to

convert her combo subscription to digital only, without losing rewards points and any other digital feature she's currently enjoying.

23 - Combo subscriber wants to cancel subscription (V1)

Julie has decided that she no longer wants her combo subscription to the Merced Sun-Star. She needs a way to contact customer service to cancel her subscription

24 - Combo subscription has option to autorenews (V1 - Developed by MPP/NCS)

Julie has a combo account for the Charlotte Observer. The Observer has made a business decision that combo accounts are auto-renews. Julie's subscription should automatically renew and her payment method will be charged when her subscription date rolls over.

25 - Buying a combo/digital-only subscription via Android app

Robert has just moved to Kansas City and wants to subscribe to the KC Star for 7-days delivery and get unlimited access to its digital platforms. He needs a way to purchase the subscription via the app on his Samsung Android phone, so he can have access to the paper and digital content.

Social sign on

26 - Non-Subscriber Social Sign On (V1)

Gina has been reading soccer stories on the N&O website. She is not a subscriber and hits the paywall. She decides to create a lite account using one of her favorite social networks to register for a lite account.

- Consideration: Social login options should include Facebook, Twitter, Google+, and LinkedIn

27 - Existing iTunes subscribers

- a. Frankie has bought a iTunes subscription from the Miami Herald's iPad app. She wants to use her iTunes account credentials to log into the Miami Herald's website and iOS app so that she can get unlimited access to content on her website.

- b. Damien has bought a iTunes subscription from the Miami Herald's iPad app. He wants to use his iTunes account credentials to log into the Miami Herald's Android app on his work phone so that he can get unlimited access. (Is this even possible with iTunes?)

28 - Automatic renewal of iTunes digital-only subscription

Michelle has subscribed to The Charlotte Observer through iTunes and has chosen the option for automatic renewal on her app store account. MPP needs to talk to iTunes so that it knows whether Michelle's subscription is still valid so that she can also log in to The Observer's website to access content.

Lite Account Registration

29 - User Opts for "light" account (V1)

Paul visits the N&O site regularly but isn't a subscriber. When he encounters the paywall, he decides he would like to register a non-paying account in order to gain access to loyalty points and to receive access to additional stories on the meter.

- * *Light accounts will be owned by MPP*
- * *Light accounts in MPP are tied to NextBee loyalty program*
- * *Light account can manage email newsletter subscriptions*
- * *Light accounts will have different meters/entitlements*
- * *Light accounts can upgrade to digital only or print/digital combo*
- * *Any digital account that becomes unpaid, such as credit card fails or the customer calls to cancel becomes a light account inheriting the meters/entitlements of the light account*

30 - Upgrade lite account to paid subscription (V1)

Martha has been a lite account user with the Observer for several months. She has used up her free access and feels it's worth paying for a digital subscription. She needs a way to upgrade her current account so she can be a add her digital subscription.

31 - Promote loyalty program (V1)

Jane is a casual reader who visits the site several times a week. She is seeing the paywall stop screen for the first time. She learns about the loyalty program and decides she would like to sign up for an account to take advantage of that feature.

32 - Lite for only loyalty points (V1)

Jasper is on the Observer website. He uses the link in the masthead to learn about the loyalty rewards program. He likes what he sees. Jasper needs a way to sign up for a lite account so he can track and manage his rewards points.

33 - Lite account for managing newsletters

Jan is a regular visitor of the Observer. She has enrolled (subscribed) to more than one email newsletter so she can keep with local news and politics. She needs a way to sign on and manage her newsletters, so she can add and remove options.

34 - Lite account user with expired entitlements (V1)

Jack is a visitor who registered for a lite account for the free trial. His trial period has expired and he is now encountering the paywall screen. He needs to be alerted to his status and presented with options so he can decide how to continue engaging with the site.

35 - Lite account to iTunes digital-only (reverse bundling)

Keagan is a registered lite user of the Fresno Bee. He encounters the paywall after reading 10 articles but dismisses it. A week later, he is still logged-in to the app and wants to purchase a digital-only subscription via iTunes so that can have unlimited access to the paper's content on his iPhone, iPad and on The FresnoBee's website.

*** See MPP Document > Option C > Step 6 > Option 3A (With paywall)*

Lite account to iTunes+print (reverse bundling) - NOT POSSIBLE TO OFFER PRINT WITH iTUNES/iOS

36 - Registration on iOS

Sean sees an ad that he can earn loyalty points while reading the news on The Wichita Eagle app but is not ready to sign up for a subscription yet. He needs to be able to sign up as a lite account user so that he can bookmark stories and be on the loyalty program.

***NOTE: We can allow user to create an account with us but cannot offer a 2-week trial from our end. To offer the trial, this can only be done via iTunes, following which a user will automatically become a subscriber unless he cancels the trial.*

Lost/forgotten password

37 - Existing user forgets password (V1)

Jason is an existing combo subscriber. One day he decides to log into his digital account but can't remember his password. Jason needs a way to retrieve or reset his password from his internet-connected device. If Jason is unable to reset his password, then he needs to be able to call or contact a customer service representative who can help him reset his password for his digital account.

38 - Existing subscriber needs to sign into their account

Juanita is a subscriber with an activated account. She uses her phone for most transactions, and she needs to log into her account to update her personal information in the member center. Juanita needs the member center to display her information so she can easily find and edit the fields she needs.

she needs the system to remember and retrieve the information from her account, so when she signs in to make updates, those form fields are populated, and she can complete her tasks more easily. (Especially on my phone)

39 - New user tries to log into an account that doesn't exist (V1)

Jose has been reading stories on The State and hits the paywall. Thinking he already has an account, he tries to log in using his email address but the system returns a message indicating that there is no email address associated with an account in the system. Jose needs to have another option for information to try and find the account that he thinks he has before he is prompted to create a new account.

40 - Logging into digital-only subscription from iTunes purchase (reverse bundling)

Ben has bought a 1-year iTunes subscription of The News and Observer. He has just bought a new iPad and needs to restore his iTunes subscription on the N&O app and be logged into the member center so that he can continue reading the news on his tablet.

41- Logging in to a digital subscription from iTunes purchase on website/other devices

Amin has a digital-only subscription of The News Tribune he bought via iTunes. He has just gotten a new laptop and needs to log in to the Tribune's website using his iTunes subscription so that he can have unlimited access to content on the site.

Gift Subscriptions

42 - Customer activates a gift subscription (V1)

Jessica just opened her birthday card from her grandmother. Along with the card is a gift subscription for to the Sacramento Bee. She opens her favorite internet-connected device, goes to the Sac Bee website, find the link from the email message that her grandmother printed out and included in the card to activate her account and enters the activation code on the email message that her grandmother printed out and included in the card. She is prompted to enter in the activation code, create a username and password, and is then granted access to the Sacramento Bee.

43 - Customer purchases a gift subscription for a friend - digital only (V1)

June sees an ad in her Facebook feed for a subscription offer for the Modesto Bee. Since she is already a subscriber, she thinks this would be a nice gift to give her daughter. June needs to be able to follow the ad link to a destination that will allow her to purchase a subscription and send it as a gift to her daughter.

44 - Customer lets gift subscription expire (V1)

Barie received a gift subscription to the Miami Herald however she never activated the subscription and it has now expired. Barbie needs to be prompted to contact the customer service center so they can provide Barbie with some alternate options to deal with her expired gift

45 - Customer buys combo subscription as a gift

Renee is a Miami Herald subscriber and she wants to buy a combo subscription as a gift for her elderly parents. She needs a way to provide details about her parents - email, mailing address, and a way to provide her credit card details to purchase this gift subscription. She also wants to be sure that her parents receive an email - like a card with the gifting information, and instructions on how to receive the digital portion of their subscription. Her parent's print subscription should start as soon as the transaction is completed.

Managing subscription details

46 - Customer updates their credit card from a browser. (V1)

David starts his day by going to check out the results of last night's caucuses in Ohio. As a long time subscriber, he heads to the politics section on Miami.com and clicks on an article called "*Coin Toss Wins The Day*". He is immediately interrupted by a prompt indicating he needs to update his credit card information due to the card number on file hitting its expiration date or return to the homepage. David fishes his credit card out of his wallet and realizes his primary card is indeed expired. Locating his backup credit card, David is able to update his payment information and is immediately taken to the "*Coin Toss Wins The Day*" article.

47 - Paid subscription expires (V1)

June is a digital subscriber with the Bee. There was a problem with her credit card and her paid account was put on hold. She needs a way to keep her loyalty program, and other member center accounts active, even though she's lost her subscriber entitlements.

48 - Paid subscription expires and customer enters grace period (V1)

Joanne's one-year subscription to the Star-Telegram has expired. Her account is now in a grace period, Joanne should continue to be able to access her print and digital

package until the grace period ends. During the grace period, Joanne needs to receive reminders to renew her subscription.

Current state of "grace periods" TC - each market has different range of grace days. A subscriber goes into grace when he runs out of money in the subscription account. He does not stop or expire yet because the site deems he is allowed some number of grace days - for example 45 days. Within the next 45 days, he has the opportunity to pay to continue the subscription. If there is a payment accepted, it would first pay off any grace owed amount, then the remainder (if any) will buy additional days based on the rate by day calculation, therefore extending the expiry date. Once the subscription goes through the entire grace period without any payments, the subscription would expire/perm stop. At that point, the site has the option to write off the grace owed. An expired account does not get purged at this time. MW - I will add that our goal is to get all markets to 90 days grace in NCS and standardize the touchpoints in terms of promoting readership, loyalty and timely payment.

49 - Update payment information (V1)

June is a digital subscriber with an expired account. She gets her new debit card in the mail and has to go through the process of updating all the accounts that used her old card. She needs a way to access her subscription account so she can add her new card information through the website.

50 - Form data storage

As a user I want the system to remember and retrieve my information, so when I come back to update or upgrade my account, those form fields are already populated, and I can complete my task more easily. (Especially when I'm on my phone)

For #2, can you be specific as to which form data? For instance, if they're trying to link their light account to their physical news subscription do we have to store their previous failed attempts to identify their account?

We don't need to store and retrieve data from failed attempts. I was thinking more about data that is associated to a verified account, or data that is temporarily held throughout a single session. I just don't want users to be asked to enter the same

information twice when they're purchasing a subscription. (This happens in our current subscription process.)

51 - Update account information (V1)

Skipper has moved to a new house in Belleville. She needs a way to update her account information to include her new address. She also needs a way to update her account for items such as: new payment information, contact detail changes (email, phone, physical address).

52 - User gets free trial (V1)

Julian received a marketing message from the N&O offering a free trial of the Olive E-edition for two weeks. He needs to have access to the product but also needs a way to subscribe (if he wants to do so) after the free trial period has ended.

53 - Account for a McClatchy employee (V1)

One perk of working for the KC Star is free access to their digital products from within their building network and outside of it. An HR manager needs an easy way to grant access to the digital products for a new employee.

54 - McClatchy employee leaves company, access revoked (V1)

An employee opts to leave the KC Star. So an HR manager needs an easy way to revoke that employees access to the digital products from inside the company network and outside of it.

55 - Corporate account for a company (V1)

Joe, a client account manager in Macon, has sold a group subscription to a local law firm. Joe needs a way to allow access to the Macon Telegraph online to the 300 employees of that law firm within the law office.

56 - Progress Indicators

I want a clear indication during the checkout flow of where I am in the process.

57 - Multi-Market Subscription Purchase

I want the ability to purchase multi-market (aka regional) access via a singular subscription.

58 - Log In / Log Out Functionality (V1)

As a subscriber, I should have the ability to easily log in and out of my subscription. I would also like to have my name display on the site when I am logged in.

59 - Concurrent log-ins

Don has a digital subscription to the Ledger-Enquirer and has shared his log-in details with six of his friends. Don and four of his friends have logged on at the same time to read an interesting sports article. Don's friend Sal decides that he wants to read the article with his friends too. Sal should not be able to read the article since he is the sixth person attempting to use Don's login credentials to access the story. Sal needs to be warned that this is the reason he does not have access.

Customer Service

Darlene works as a customer service representative for the Observer.

She has a customer who...

60 - Reset password on the phone

Darlene has a customer who would like to set up a vacation stop, but can't remember their password. Darlene needs a way to reset and give the user a temporary password on the fly, so the user can complete their task quickly.

61 - Reset password with email

Darlene has a customer who is trying to sign into their lite account to check their loyalty points. They emailed the customer service center for help. Darlene needs a way to respond to the email with a temporary password so the user can complete their task online.

62 - Activation help

Darlene has a customer who has encountered the paywall, but doesn't have an email address in the system. Darlene needs a way to enter a user's email and help them set up a password, so they can sign in with full access.

63 - Credit card update

Darlene has a customer who has an expired credit card associated to their (EZ-Pay) account. Darlene needs a way to access user's account, so she can update their payment information.

64 - Multiple offers available

Darlene has a customer who feels they've been charged the wrong amount on their last statement. She needs a way to look up the account offer the user purchased so she can validate their charges to their credit card.

65 - Lite account help

Darlene has a customer who is confused because they have a lite account but they're seeing the paywall screen. Darlene needs a way to check on the status of a customer's entitlements so she can give them advice on how to proceed.

66 - Canceling subscriptions

Max is a customer service representative in Macon. He has a customer who has decided to cancel his digital account. Max needs a way to cancel a user's subscription. (Business?) And refund the balance that is not going to be used.

67 - No newspaper delivery - credit account

Max has a customer who didn't receive their morning newspaper. They aren't interested in getting it delivered later in the day. Max needs a way to credit the user's account to extend his subscription period to keep his customer happy.

68 - No newspaper delivery - off-cycle delivery

Max has a customer who didn't receive their morning newspaper. They want to have it delivered later in the day. Max needs a way to schedule an off cycle delivery to keep his customer happy.

69 - Newspaper delivery issue - One day access to E-Edition

Max has a customer who didn't receive their morning newspaper. Joan in the call center wants to offer him a one-day pass to view the day's paper via the e-Edition. Joan needs to be able to set up a day pass for Max.

70 - Customer needs refund

June, a customer service representative receives a call from a customer who is moving out of state and needs to cancel her subscription to the Herald-Leader. Since she has

six months to go on her subscription, she would like a refund for the remaining balance on her account. June needs to have a way to provide a refund.

71 - Current subscriber downgrades from combo to digital only

User scenario around a user downgrading from print combo to digital only and what happens with the money left over from the subscription – basically ending in NCS and starting sub in MPP – what is the process/requirements and options?

Kansas City (NCS)

- *What are the customer service transactions that are entered into NCS/DTI to downgrade the subscriber? VIP rep enters a stop on the combo subscription in NCS*
- *How is the subscriber then started as a digital only subscriber? VIP rep creates a digital only subscription in either Piano or Firefly*
- *How is the remaining \$ balance from the digital subscription handled (i.e. transferred to new account, refunded, ...?) A refund is generated on the remaining balance on the stopped combo account.*

Sacramento (legacy site)

- *What are the customer service transactions that are entered into NCS/DTI to downgrade the subscriber? Reps do a delivery schedule change to a digital only rate in DTI (also, they add an email address if it is not in the system).*
- *How is the subscriber then started as a digital only subscriber? As long as the customer is registered & activated, there is no other change needed (the DTI digital only rate will change subscription rate and non-print delivery on the account). If the customer is not registered or activated, customer will need to complete the registration process through Press+ (VIP rep will assist as needed).*
- *How is the remaining \$ balance from the digital subscription handled (i.e. transferred to new account, refunded, ...?) Since no new account is created with a delivery schedule change no \$ transfer is required. If the customer has money that needs to be refunded for whatever reason (disputed print deliveries, etc.), a refund is generated through Finance department.*

72 - Global Account Management

Luci is a customer service representative, she would like to be able to log into a single dashboard and manage/triage all McClatchy subscribers, regardless of their specific markets.

73 - Account Change Tracking

Ethel a customer service representative, she wants to be able to make notations on a user's account from a central dashboard to document the resolution of a particular problem.

74 - Real-Time Account Confirmation

Fred is a marketer who wants to send a campaign to all combo subscribers for one market. He needs to be able to ensure that all combo account activations are tied to valid accounts.

75 - Progress Indicator Testing

As a marketer, I want the ability to test variations in progress checkout flow indicators.

76 - NewsCycle Communication

As a marketer, I want the ability to sell subscriptions through the iServices portal but allow readers the ability to create accounts/log in using the new Subscription Manager platform.

77 - Multi-Market Subscription Configuration (P2 or 3)

As a marketer, I want the ability to set up multi-market (aka regional) subscription options.

78 - Multi-market subscriptions financial distribution (P2 or 3)

As a financial analyst or auditor, I want to be able to split the revenue between regional properties for any subscriptions that involve multiple markets

79 - Subscriber Look Up - Email

As a customer service representative, I want the ability to look up a subscriber via email address.

80 - Subscriber Look Up - No email on file

As a customer service representative, I need to be able to find a user's account if there is not an email address currently associated with the account. I need to be able to search for an account using a phone number and first and last names. If I still cannot find an account using this criteria, then I need to be able to search for a user's account using a house number and zip code combination.

81- Subscriber Account Creation

As a customer service representative, I want the ability to create a new subscriber account.

82 - Subscriber Access - Subscription Based

As a customer service representative, I want the ability to grant access to subscriber accounts.

83 - Subscriber Access - Complimentary

As a customer service representative, I want the ability to create, edit or delete complimentary accounts.

84 - Registration Field Configuration

As a marketer, I want the ability to stipulate the minimum mandatory fields required for registration.

85 - Device/platform specific checkout flow

As a marketer, I want the ability to create different checkout flows based on the readers specific device or platform.

86 - Lightbox Copy Change

As a corporate marketer, I want the ability to test variation in lightbox copy so that I can A/B test different variable to deliver different offers to users in order to find the most effective one.

87 - Debugging Tool

As a system administrator, I want a simple debugging tool to look at the code on a page and determine the following authentication settings (threshold, ticks remaining before hitting the threshold, and any exemption rules that apply).

88 - Complaint Classifications

As a system administrator I want the ability to configure default customer complaint types for the purposes of expediting resolution and tracking themes.

89 - Universal Account Creation

As a system administrator, I want the ability to easily grant universal access to all McClatchy products (aka "universal" accounts).

90 - Bulk Account Creation

As a system administrator, I want the ability to import and create accounts in bulk.

91 - Subscription Access Association

As a system administrator, I want the ability to associate product access to subscriptions.

92 - Global IP White Listing

As a system administrator, I want the ability to implement global ip white listing.

93 - Market-specific White Listing

As a system administrator, I want the ability to implement market specific ip white listing.

94 - Multiple market IP White Listing

As a system administrator, I want the ability to implement multi-market ip white listing.

95 - Specific URL White Listing

As a system administrator, I want the ability to implement specific URL exemptions.

96 - Threshold configuration

As a system administrator, I want the ability to exclude specific products from global meter thresholds.

97 - Threshold configuration

As a system administrator, I want the ability to configure global meter thresholds by product type.

98 - Configure Lightbox - Countdown Lightbox

As a system administrator, I want the ability to configure and display multi-stage lightbox (aka countdown messaging). I also want to ability to configure this setting so that I can choose to have the countdown messaging on or off.

99 - Automated Change Notification

As a system administrator, I want the ability to receive automatic notifications when lightbox copy is modified with the name of the market that modified the copy.

100 - Sub Account Notifications

As a system administrator, I want the ability to display a notice inside publication specific dashboards related to service outages.

101 - Customer Service Account Creation - (Account Creation) Market Specific

As a system administrator, I want the ability to create, suspend and delete Market and Corporate accounts.

102 - Customer Service Account Creation - (Account Creation) Global

As a system administrator, I want the ability to create Customer Service Accounts with access to all McClatchy markets.

103 - Terms of Service (V1)

As a system administrator, I want to require that readers to indicate that they agree with the sites Terms of Service as part of the activation/checkout process.

104 - Parent/Sub Account Creation

As a local marketer, I would like the ability to establish parent and sub accounts.

105 - Newsletter Registration Prompt

As a local marketer, I would like the ability to prompt registrants/subscribers to sign up for newsletters and global partner offer opt-ins as an optional step at the end of the checkout process.

106 - Market creates a product

As a marketer, I want to be able to create new product packages of content to sell by story, by section, by site, by groups of stories, or groups of sections.

P2 -Ability to create new products by sections or stories across multiple markets (ex. a millenials product around entertainment or travel content).

107 - Customer questions comes in the form of an email

Jane the customer service rep needs to perform any customer update/request that she may receive from customer support email.

108 - Setting a pricing schedule

Paywall (All of these scenarios should be P1)

Metering Requirements:

* Metering begins the first time someone looks at metered content. It is not based on the calendar month.

* Metering counts unique URLs.

* Traffic referred from social networks (Facebook, Twitter, Pinterest, Linked In, Google+, Instagram.) does not trigger a tick on the paywall meter for now. This may change in the

future so would want the option to turn metering on or off for these referrers. We want to set a number of “non-triggered views” per social visit.

- * Traffic referred from a search engine does not trigger a tick on the paywall meter. We want to set a number of “non-triggered views” per search visit.

- * When metering limit is reached, the user is prompted to create an account

- * The prompt that displays will be appropriate for screen size and platform (i.e. smartphone browser, smartphone app, desktop browser, tablet browser, tablet app)

- * Business can set a rule that will grant a user access to more content once the user completes an account creation

- * We want the capability to alert the user that their content viewing is limited and where they are in the process before they will be asked to purchase or register for an account (whatever form of “payment” the business decides is reasonable for the user). We also want users to activate and use this process as a prompt to do so.

- * Metering can be turned off at site, section, or page level (we want this at an asset level as a business option, however, we may decide to manage it less granularly)

- * Local markets may not have the power to change the paywall threshold or what pages sit behind the paywall -- TBD

- * Digital subscription marketing pages or promo offer landing pages do not count against the meter

- * Support can change settings for a section and/or site. Individual sites can not change their own threshold and metered content block settings.

- * We can configure the page types (blog, story, video, gallery) that are or aren’t metered (Phase 2 -- from the URL, no way of telling what the page type is from the URL)

- * Search engine bots can still crawl and index all site content

- * Paywall threshold counts are triggered by these pages:

- ** Story pages

- ** Story page when video is the lead asset in the story

- ** Gallery and image media detail pages (only the first photo view is counted)

- ** Blog (detail page)

- ** Themed sections

- * These page types do not trigger an count on the paywall meter:

- ** Homepage

- ** Section fronts

- ** Video detail pages

- ** Vendor pages

- ** Search results pages

- ** Promotional and marketing landing pages

*Metering threshold and time frame is configurable (i.e. # of pages and days)

Metering Scenarios

01 - Entire site behind paywall

Given a user that has viewed no premium pages (content pages - story detail, gallery, or blog detail) within the last y days

And the Paywall is set for an entire site

And the Paywall is set to allow x number of premium pages within 30 days

Then the reader can view up to x number of premium pages (content pages - story detail, gallery, or blog detail) before seeing a prompt for user account creation

02 - Cancel behavior

Given a reader has hit their y-day premium content limit

And the reader is viewing the paywall prompt to create an account to view more content

And the reader declines

Then the reader is redirected to the publication's home page and unable to view the premium content requested

(Note: This behavior should be vendor-driven, but important that we don't accidentally allow them to view content if they cancel out of the paywall notification)

03 - User sees paywall

Given a user clicks on a headline to read a story and the story is their x number of premium pages in y days

Then the users sees the story's headline and first graf

And the rest of the story is blurred out

And there is a prompt to sign-in/sign-up for an account in order to view more content

04 - Viewing the same story multiple times

Given a reader is viewing a premium content story

And the Paywall is set to allow x pages within y days

Then the reader is metered one time for viewing the story detail page but is not metered for viewing the story again at anytime within the y day metering timeframe or if they reload that story page

05 - Only a sub-publication is behind a paywall

Given a reader that has viewed no premium pages within the last 30 days

And the Paywall is only configured for a themed section

And the Paywall is set to allow 10 premium pages within 30 days

Then the reader can view up to 10 stories within the themed section before a lightbox for account creation is triggered and an unlimited number of stories within the rest of the main site, which never triggers the pop-up

06 - Entire site behind paywall with the exception of a section

Given a reader that has viewed no premium pages within the last 30 days

And the Paywall is set for the entire site except the Sports section

And the Paywall is set to allow 10 premium pages within 30 days

Then the reader can view up to 10 premium pages within sections behind the paywall before a lightbox for account creation is triggered and an unlimited number of stories within the Sports section, which never trigger the pop-up

07 - Entire site behind paywall with the exception of a story

Given a reader that has viewed no premium pages within the last 30 days

And the Paywall is set for the entire site except for a story that the market feels readers should view freely

And the Paywall is set to allow 5 premium pages within 30 days

Then the reader can view up the story even after hitting the threshold for viewing premium pages.

08 - Vendor Pages

Given a reader who visits any number of vendor pages from their preferred device type

Then the reader is still allotted their full remaining number of premium pages, not having any vendor page visits count against that total

09 - Marketing and Offer Pages

Given a reader who visits a Marketing of Offer pages (subscription offers as an example) on the site

Then the reader is still allotted their full remaining number of premium pages, not having any Marketing or offer page visits count against that total

10 - MPP only meters certain page types

Given that a site's [environment] is configured to be behind the paywall

And the main content category for the site allows x page views before showing the paywall prompt

When the source of a [pagetype],

MPP code is [result] .

examples:

|pagetype|result|

|homepage|do not|

|section front|do not|

|Video detail page|do not|

|search results page|do not|

|vendor page|do not|

|Marketing pages|do not|

|Offer pages|do not|

|gallery detail page|do|

|story detail page|do|

|blog (detail page)|do|

|environment|

|preview|

|live|

11 - Registered user is not logged in and hits threshold after five pages

Given that a site's [environment] is behind the paywall

And a user is not logged in but has an account

And has viewed five premium pages

Then the MPP prompt displays and the user is prompted to register or login.

12 - Unregistered user hits threshold after five pages

Given that a site's [environment] is behind the paywall

And an unknown user views five premium pages

Then the MPP lightbox displays and the user is prompted to register or login.

13 - Lightbox displays remaining page views left before paywall is triggered

Given that a site's [environment] is behind the paywall

And a user is unregistered or has not logged in

When the user has viewed two premium pages

Then a note will display to let them know three premium page view remain before they will be asked to register

When the user has only one article remaining

Then the message displays again to let them know one premium page view remains before they will be asked to register

If the user has not hit the threshold within 30 days

Then the countdown resets to five premium pageviews allowable

- This should be configurable so markets can opt to have it on or off

|environment|

|preview|

|live|

14 - Only the first image is counted when viewing galleries

Given that a site's [environment] is behind the paywall

And a user has wants to view a gallery

Then only the first image of the gallery will count towards the X premium page views

|environment|

|preview|

|live|

15a - Daypass digital-only entitlement

Charlene love basketball and her beloved gators are in the NCAA tournament. She has driven to Kansas city to see her team play and wants to read all the basketball tournament articles she can on the Kansas city star. She does not want to purchase a yearly or even monthly subscription but she would like to purchase access for a day to read articles on the Kansas city star site. Given that a user has purchased a daypass product the user has 24-hour access to the market site without the paywall triggering.

15b - Daypass digital-only entitlement

Gina frequents starbucks and she notices a stack of promotional cards saying she could have access for 24 hours to the News and Observer with the information on the card.

We will need to require an email and password so that the markets can follow up on an offer for those customers.

16 - Different threshold levels for different platforms

17 - Video playlists

18 - A section sits outside the paywall

If SacBee wants content in the 49ers section to be free, and there is a 49ers story that is in the 49ers section, local section, and business section... is that story free simply because it is in the 49ers section, or is it somehow dependent on how the user navigates to the story? We could use a detailed scenario on this.

19 - Lite account user reaches end of free trial

We need a scenario to understand how you want the rolling paywall to work with subscribers who opt in for a lite account and then their lite account expires. We assume they go back to getting 'x' number of free articles every 30 days, but what dictates the start of that 30 day window? Is it the end of the lite account subscription or is it still based on the first day they read an article?

Analytics

UX Analytics

Wendy is part of the UX research team. She runs reports to track how users react to the different alerts surrounding the paywall. She needs a way to measure how individual users interact with those screens so she can tell what messages are working and what needs to be changed.

A/B Testing alert screens

Wendy is part of the UX research team. She needs a way to analytically test alert messages and alert screen scenarios so she can measure and optimize the UX for the subscription and related features.

Enterprise message management

Joe is the Audience manager for McClatchy. He learned that a test revealed a better message on the paywall stop screen increased conversions. He needs a way to update that text on all the market's paywall screens so they can all take advantage of the optimization.

Scenario: Data analyst wants to track usage

As a Product Manager I want to be able to know who has started a check out and where they stopped so I can improve the process

- If someone is signed up for the lite account and not loyalty or other lite account service, so I can market to them what they are missing
- As a business analyst, I want to know whether or not a user is a print activated subscriber vs. a digital only subscriber when analyzing their behavior on the site within the analytics program.
- As a data analyst I want to know how many times someone hits the paywall before they sign up
- As a data analyst I want to know how many people sign on via a social network and which network
- **Omniure tagging:** As a business owner, I want to have analytics to show how users enter and engage with our subscription process, so I can become aware when there are problems with the UX that need to be addressed.
- In a perfect world, we should be able to track when a user engages with the process; how often do users enter the process, abandon, and come back later; and where are users most likely to abandon in the process.

*** Scenarios:Audience manager use cases***

- As an Audience manager I want to track site activity and connect that behavior to an anonymous ID or a registered user account.
- As an Audience manager I want users who sign in via social channels to be captured and have data stored in the master user database. *MPP/Janrain captures the following basic profile info, which is then used to create a profile in eSuite.*
 - *id*
 - *name*
 - *first_name*
 - *last_name*
 - *age_range*
 - *link*
 - *gender*
 - *locale*
 - *picture*

- *timezone*
 - *updated_time*
 - *verified*
 - *email*
- As an Audience manager I want to connect a social sign-in to a subscriber record, *MPP/Janrain captures the following basic profile info, which is then used to create a profile in eSuite.*
 - *id*
 - *name*
 - *first_name*
 - *last_name*
 - *age_range*
 - *link*
 - *gender*
 - *locale*
 - *picture*
 - *timezone*
 - *updated_time*
 - *verified*
 - *email*
 - As an Audience manager I want to be able to connect a lite account to a subscription account if the reader converts.
 - As an Audience manager I want to be able to connect the activity of anonymous reader to an account when that reader converts or signs-in.

Reporting

We currently have the following business reports we use now that we need as a minimum:

S3 browser -- Press+ activity report

S3 browser -- Press+ revenue report

S3 browser - Monthly ABC report (market by market)

DMRS server - a dozen reports there: Digital Access (by day and count of subs), Digital Bundle Access included.

NCS Cloud (synchronex report for AAM)

Monthly retention report

AAM Quarterly filings by newspapers -- in the DMRS -- run print and digital bundles; digital only and aggregated to file our quarterly avgs. Digital Subs in the NCS system - pulled through the AAM draw export.

Audit time -- digital usage by subscriber and access (used S3 browser Press+ activity report) -- user by day and devices they are coming to us on. 26 of our 29 newspapers. NCS cloud reporting for that - direct from the NCS database - similar set of tools.

Want to get rid of the S3 browser and the DMRS -- have it come direct from either NCS or MPP -- active users and access reporting. These are a pull system of reporting. We want to eliminate manually pulled reports and eliminate that for an automated solution where the data is pushed to us.

Payment Processing

Billing, Renewals, Cancellations

What payments will we accept? Paypal, Visa, Mastercard, Discover (Markets have different options currently so this needs to be configurable)

Gift cards, Dealsaver or daily deal vouchers/promotional codes

How are refunds given? Check, refund to card, other?

Integration with Edgil & Auditing requirements

Reports that finance needs on a regular basis – 5-4-4 requirements; flash vs. actuals, etc.

Accounting for iTunes subscriptions - access app figures, goes thru Itunes makes payment into finance group... we back into our circulation based on volume

eReader similar process to iTunes

01 - Data required from NCS

Elaine is a financial auditor looking at McClatchy records. For digital subscriptions, she needs to be able to retrieve the following data from NCS in order to confirm the company's records are in order:

This information will need to be found in NCS:

- Archiving any import files from MPP, be it new starts or payment information (lockbox files)
- Capturing the new start in NCS
- Accepting payments
- Verification that the new subscription started correctly and that payment is buying the correct number of days based on rate
- Verifying subscriber's digital access
- Amortization of payment over time
- Following the money, ensuring the payments hit the correct General Ledger account

Here is the current dataflow for Synchronex - which gives a good outline of the data that needs to be present in NCS for all paid accounts:

To start a sub through Synchronex, the customer provides name, address, phone and email, plus payment info (cc and amount). This is all passed to NCS.

For audit, I had to track the progress, from start to finish. Info entered in the Synchronex site.. then make sure all that is in NCS--customer info, correct rate code, correct payment amount. Then when credit card processing is run in NCS, make sure the expiration date updates correctly.

Additionally, for active digital (dig only or print/digital combos) customers actually accessing the online content in whatever platform (web, e-edition, replica or non-replica), that info must surface in NCS too, so we can track Access for AAM reporting.

02 - Report on Customer Complaints

As a data analyst, I want to be able to generate reporting on customer inquiries addressed in the Subscription Manager dashboard.

03 - Report - Account Status

As a market analyst, I want the ability to generate a report that calculates subscribers by status.

04- Report - Purchase Flow Abandonment

As a market analyst, I want the ability to generate a report that calculates purchase flow abandonment.

05 - Report - Account Activation Abandonment

As a market analyst, I want the ability to generate a report that calculates account activation flow abandonment.

06 - Report - Threshold Interaction

As a market analyst, I want the ability to generate a report that calculates readers hitting the threshold and the associated percentage of total visitors that represents for specific time periods and custom dates.

07 - Report - Platform Based Conversions

As a market analyst, I want the ability to generate a report that calculates reader conversions by device and by marketing campaign and/or landing page.

08 - Report - Starts by Subscription Type

As a market analyst, I want the ability to generate a report that calculates purchase flow abandonment.

09 - Report - Access by Product

As a market analyst, I want the ability to generate a report that calculates reader access by product (desktop website, Olive OMV, Olive ODE, etc.)

10 - Report - Account creation by SSO Type

As a market analyst, I want the ability to generate a report that calculates account creation by social networking type.

11 - Report - Access by Device Type

As a market analyst, I want the ability to generate a report that calculates access by device type (desktop, iPhone, iPad, etc.).

12 - Report - Starts by Device Type

As a market analyst, I want the ability to generate a report that calculates purchase flow abandonment by device type.

13 - Scheduled Reporting

As a local market analyst, I would like the ability to automate and schedule reports.

14 - Report Types (Total Count versus Raw Data)

As a local market analyst, I would like the ability to generate reports that are either total count or raw data.

15 - Reporting Duration

As a local market analyst, I would like the ability to select the reporting period for a particular report.

16 - Report - Account Activation

As a market analyst, I want the ability to generate a report that calculates new account activations by type (Digital-Only reactivation, Print-Digital Bundle Reactivation, and new Digital-Print Bundle Activations) and by trial (free) accounts where applicable.

17 - Report - Retention by Subscription Type

As a market analyst, I want the ability to generate a report that calculates purchase flow abandonment.

18 - Report - Checkout Flow Abandonment

As a publication marketer, I want the ability automate a daily report of readers (email address) that failed to complete the checkout flow (purchase or activation) process.

19 - Report - Conversion tracking

As a corporate marketer, I want to be able to track conversions/purchases from my marketing programs, which can include: Email blasts, search campaign retargeting, display ads, social media ads, specific landing pages.

20 - Customer Lists

As a corporate marketer, I want to be able to get customer email and SMS lists based on where and how they signed up - thru hitting Olive, mobile web, apps, loyalty program or a specific landing page.

21 - Subscriber list based on product

As a marketer, I want to be able to generate a list of subscribers and what products they have signed up for so that I can do exclusion marketing campaigns - email newsletters, SMS alerts, push notification, social media follower

iServices are used by the markets for the following:

- 1) Takes new starts

- 2) Processes payments on current accounts
- 3) Makes customer service transactions such as:
 - Change Contact & Address Information
 - Update Payment Information
 - Pay Your Bill
 - Renew Your Subscription
 - View Account History
 - Place a Vacation Hold
 - Make a tip
 - Change Subscription Plan
 - Provide Delivery Feedback
 - Links to contact us and FAQ's.
- 4) Account Home

6. Open Questions

1. Are there Aurora sites that we need to remove Press+ code from? If so, what date?
<http://www.varsitykansas.com/>
This site might still have press+ code but it shouldn't
<http://www.triangle.com/>
Both could remove the press+ right now.