# Business Requirements for Technical Support of ECM Library

## Software

## Mandatory

1. Ability to log and store User name, phone number and Email, with multiple users tied under one Customer Name and/or Customer ECM Library ID.
2. Multiple Call/Event IDs can be logged under each user name.
3. Can search on anything field to find user contact info, access company information and access any previous call history.
4. Database is centralized and accessed across the internet using secure access.
5. Multiple technical support people can access database concurrently.
6. When a call comes in, the technical support can immediately access previous call history and notes made by any other technical support person. The previous call would be coded with information such as length of call, call summary, whether issue is closed or open, if open, next steps.
7. During a call a technical support person has access to the customer information on one screen or partial screen along with a knowledge base. Knowledge base includes a list of script questions that are categorized by type of question or issue. For example: archival, email search, library, content search, common error messages.
8. Very few clicks are needed to get to specific questions to ask a customer.

## Ideal Software Requirements

1. Alerts are sent off if an open trouble is not closed during a specified period of time, based on what open code is used (e.g. technical support to analyze and call back – code xx, or the customer will call back once a new publish has been applied or DLL library code xx ). SLAs are also based on a severity code used for each call. Calls can be tracked based on Event ID or any customer info.
2. Customer ID is validated daily/weekly against a current support license agreement.
3. Multiple authors can update the scripts. Multiple editors can review the scripts. The status of updates without edit approval are apparent.
4. Screen shots can be saved and presented to help technical support/knowledge base.
5. The system is a centralized knowledge base for any agent supporting ECM Library. System can be used for ECM Library support PLUS for VARs. Customer information can ONLY be viewed by those reps who are supporting those customers. Script and technical reference information can be used by all. ECM Library “global searchers” can view across all information for quality assurance purposes.
6. Tied into its own Chat box so a user can log into a website and Chat online as an alternative to call.
7. Emails with “screen shots” sent to customer service …hmm can be stored somehow, linking it to the user call event.
8. Knowledge base of technical support can be easily transferred into an online community forum for customers to access on help tips.
9. Reports by VAR can be accessed to show customer service performances to ECM Library management. E.g. Number of calls per trouble, times to close, average call length, customer level satisfaction?

## Technical Support Skills

**Level One and Two**

1. General knowledge about the operating systems ECM Library supports, Vista OS’s, XP Pro, Windows 7, and Office products 2003, 2007.
2. General understanding of search strategies, including Boolean operators, Google advanced searches.
3. Concepts of archive, search, retrieval and restoring of content are understood.
4. Some experience working on search and retrieval and/or groupware/collaboration and/ or content management solutions.
5. Ability to grasp and speak to the business purposes for archiving, accessing and retrieving content and emails.
6. High level customer social skills, as calls could take 30 minutes to resolve.

**Level Two**

1. On staff for Level 2 skills: SQL Manager skills for trouble shooting and database knowledge. Would be able to perform as a basic SQL administrator in a company.
2. Strong skills in working with all levels of customers as calls could take a few hours to resolve.

**Supervisor**

1. Calls can be monitored or recorded for quality assurance purposes.

## Telecommunications

**Management of Calls**

1. Calls are automatically programmed and re-routed to next available agent if call is not picked up immediately. Ideally, the customer is given a voice recording as reassurance if the call is routed to the second person.
2. Ideally technical support phones can signal a centralized Automated Call Distributor as available or not so calls are not re-routed after x number of rings.
3. A voicemail backup is available if no one answers and/or for after hour support. More than one person can call into the voicemail to access information left by client. Greeting can be changed on a daily basis.