**Support Site Requirements  
Jim Baldwin**

The  support site serves 4 audiences: customers (with and without support contract), partners, Professional Services, and the Sales staff. Professional Services, Regional Sales Managers and Directors, and Administrators will be referred to collectively as “Employees.” RSM = Regional Sales Manager.

1. **Functionality Overview:**

* All audiences:
  + Download of software and release notes (with support contract), and manuals.
  + Access to online Knowledge Base
  + Send support requests via webform/mailto
  + View Support Contract options
  + View End-of-Life pages
  + Update “my account” information
* Partners and Employees:
  + Access Marketing image bank, Marketing collateral (PDFs), Sales Scripts, Sales Contact List
* Access Sales Presentations – partners have access to the fewest documents, employees have more, and Sales/Marketing/Pro Services has all access.
* Partners:
  + Create and View Opportunity Registrations. Access control for this will be discussed in a separate document.
* Sales Staff:
  + Review and approve/disapprove Opportunity Registrations.
* Administrators and Professional Services:
  + Create and manage users
    - Reset passwords, reset expiration date
    - Administer granular permissions
* Webmaster
  + Upload/maintain software, documents – there is currently no back end GUI for this, mostly because of security restrictions on the server, but partly because it wasn’t worth it to accommodate one user. Expanding this access beyond the webmaster would involve company policy questions.
  + Delete support accounts. The only time I do this is when employees leave the company. All other expired accounts are retained. I believe IT has purged some accounts but I don’t know what their criteria were.
* Cron jobs:
  + Notify RSMs and Sales Admins of expiring support accounts at 90-, 60-, and 30 days prior to expiration. When the account expires, access is blocked but all user data remains in the system.
  + Notify Partners, RSMs, Sales Directors of new, resubmitted, and expiring Opportunity Registrations.

Software Download:

* Four categories: Series 3000-XR, Series 3000, Series 2000, TITAN EP. May need additional categories in the future.
* Fields for Software Download items:
  + Version
  + Release Date
  + MIB filename (zip file) (2000 only)
  + Release Notes (pdf)
  + Additional documentation (up to 2)
  + Firmware compatibility Information – TITAN only
* Knowledgebase
  + Accessible to all registered users
* My Account
  + Update account information:
    - Fields (subset of Account fields, there are some things users can’t change, like their access level).
      * First Name
      * Last Name
      * Phone
      * City
      * State or Province
      * Country
      * New Password
      * Retype New Password
      * Password strength: We’re using 8+ characters, at least 3 of: uppercase, lowercase, numbers, and symbols. We don’t necessarily need this same rule, any algorithm of equivalent strength would be fine.
      * We’ll have to grandfather existing passwords when we migrate the user data.
      * Email update checkbox – this needs to go into a separate email list which is used for software upgrade notifications. This is separate from any email newsletters or marketing contact list.
  + Request an Account
  + Sends email to Sales Administrators and Webmaster, Administrator can accept or ignore.
  + Upon Account creation, a welcome email with a temporary password is generated.
* Administration
  + List all accounts, filter by first, last, company, email – display last login info.
  + Add/Edit Accounts
    - First Name
    - LastName
    - Company
    - Email
    - Phone
    - City
    - Country
    - State/Province
    - Password (not needed for “Add Account,” password auto-generated).
    - Retype Password (not needed for “Add Account,” password auto-generated).
    - “Send New Password” button – generates password and mails it to the user
    - Expiration Date
    - Account Type
      * Invalid (Banned)
      * Not Authorized (applied but not yet accepted)
      * Temp/Eval – 30-day temporary account
      * Partner – Access to manuals and knowledgebase but not software downloads. Access to Partner Sales literature and presentations
      * Partner Plus – Partner, plus access to software downloads
      * Basic Warranty – Access to manuals and knowledgebase.
      * Premium Support – Access to manuals, knowledgebase, and software downloads
      * 24/7 Global Support – same support access as premium, this is just a contractural phone support difference.
      * Employee – All of the above plus access to additional sales presentations
      * Sales/Marketing – All of the above plus access to even more sales presentations
      * Individual Sales users – granular access to Opportunity Registrations on a per-user basis, discussed separately
      * Administrator – all of the above plus uploading software and manuals, managing users including granular permissions, viewing reports.
    - Product Categories – checkboxes - granular product-specific access to software, manuals, knowledgebase, release notes, MIBs
      * IntellaPatch Series 2000
      * IntellaFlex Series 3000
      * IntellaFlex Series 3000XR
      * TITAN EP
    - Notes (textarea)
    - Special Downloads – These are unreleased software versions that can be made available to individual users on a per-user basis. We need to be able to add and delete items from the checkbox list.
  + Create Edit Knowledgebase Articles
    - This is a Drupal content type that is rendered on the support site
  + Reports
    - View Software Download Statistics – Name, Company, File, Date
* Opportunity Registrations --- This is in a separate document
* General Security Considerations
  + No downloadable files should be reachable directly from a URL – preferable to have them outside the site doc root.
* Other General Requirements
  + All system email (webforms and cron jobs) should be bcc’d to the Web developer and/or System administrator.

1. **Content Pages**

* **Software – owned by Director of Professional Services**
  + Introductory message for page (“To obtain older software not listed here, please contact Support.”)
  + Four tabs for 3000-XR, 3000, 2000, TITAN EP
    - Bulletin area on each tab (e.g. Heartbleed advisory)
    - Each release version can appear under Pre-Release, Current Releases, or Previous Releases, or not appear at all but remain in the admin interface to be enabled later. Each section has a header message. Releases sorted in reverse version number order.
    - Each release has a “Download Software” button that can be enabled or disabled. If disabled, “Contact Support” message appears.
    - Each release has a version number, release date, MD5 hash, and links to associated documents (up to 3 associated documents per software version).
  + Ability to add product tabs in the future
* **Manuals – Owned by Director of Professional Services**
  + Manuals are not currently displayed along with releases on the software page. That could be done, but they should also be listed separately since older manuals might apply to software that is no longer displayed on the software page.
  + I would do a content audit to find out what manuals still need to be on the site, especially in the case of older TITAN manuals.
  + Four tabs – 3000-XR, 3000, 2000, TITAN EP
    - Current categories are chassis, blades, software, current and previous of each.
  + Message – “To obtain older manuals, please contact Support.”
* **Knowledgebase – Owned by Director of Professional Services**
  + The Knowledgebase admin interface is in Drupal, but is displayed on the Support site. This was a requirement of previous management. Most of the content is legacy and hasn’t been updated in quite some time, but seems to be used by Pro Services.
  + Article fields
    - Title
    - Body
    - Category
      * Series 3000
      * IntellaPatch Chassis
      * Legacy IntellaPatch Chassis
      * IntellaPatch Blades
      * Software
      * Transceivers
      * Scripting
      * Setup
      * General
      * TITAN
  + Full-text search – the search function does a full-text wildcarded search of the content
  + Search logging – all searches are logged along with “not found” result or subsequent user behavior if found – i.e., what did they click on?
  + Search terms that result in “not found” are added to the search index if appropriate.
  + Article pages display a “Was this helpful? Yes-No” dialog with a comment box. Replies are logged.
* **Support Request – Owned by Director of Professional Services**
* **Support Agreements – Owned by Director of Professional Services**
  + Static page for 2000 and 3000 standard and premium support matrix
  + Support contact info
  + Links for
    - Request a customized integration plan
    - Request a training plan
    - Request a quote
    - These all send an email to [support email address]
    - Reassess these and see if they are still needed.
* **End of Life Products listing -- Owned by Dir. Sales/Dir. Operations**
  + Legend
  + Link to EOL Policy page
  + Database-driven product listing
    - Name
    - Part number
    - Category
      * 2000 Series Chassis
      * 2000 Series Blades
      * 2000 Series Accessories
      * 2000 Series Software
      * 3000 Series Chassis
      * 3000 Series Blades
      * 3000 Series Accessories
  + Searchable by Category, Model number
* **End of Life Policy – static text page – Dir. Sales, Dir. Operations**
* **Partner Portal – Owned by Channel Marketing Manager**
  + Link to Opportunity Registrations
    - View my Registrations
    - Create a new registration
  + Link to Connect newsletter archive
    - Newsletters are basically static pages but need login password protection.
    - Newsletters are linked from the “can’t see this email?” link in the newsletter.
  + Marketing Literature
    - All marketing literature is administered in the Literature section of Drupal – this keeps Web site collateral synced with Support collateral.
    - All downloads are logged and email notifications sent to Channel Manager (Marianne) and Webmaster.
    - There is a cron job that translates the Drupal data into a flat file for use on the support site. (this wouldn’t be necessary for a Drupal implementation of the Support site.)
    - Partners can see all Drupal Literature with a Visibility of “Public” or “Partners” – I recommend a content audit to see what is still needed/current
    - Search
      * All PDFs are full-text index in the database and fully searchable
      * Searches are logged along with subsequent user behavior (what did they search for, what did they click on)
      * “not found” searches are logged for inclusion in the search index if appropriate
    - Search results page and content-type specific pages
      * Display columns
        + Document Name
        + Doc Number
        + Last Update
        + “new” or “updated” icon based on user’s last login date
      * List can be sorted by clicking on any column head
      * User can select documents by checkbox and generate a zip file of selected documents
        + Links to check all, uncheck all, check new/updated only, toggle all
  + Sends an email to [support email address]. This could be a form, but it needs to send an email to [support email address], because the CRM system uses that to open a support ticket automatically.
  + Link to Image Bank
    - Database-driven image bank. Thumbnails of products with links to print-resolution images.
* **Sales/Marketing Portal – owned by Director of Sales, Director of Marketing**
  + Sales/Marketing Literature
    - Same Design/Functionality as Partner Portal except includes all Partner Literature plus that with visibility of “Employee”
  + Partner Syndication Demo page – are we going to continue this?
  + Link to Image Bank – same as on Partner page
  + Visio Stencils – links to 2000 and 3000 series zip files
  + Sales Scripts – static page, revisit to see if current
* **My Account page**
  + User account info update form
* **Administration**
  + User account administration
    - Add/Edit user info
    - Reset password and notify user
    - Enable pre-release software downloads on a per-user basis
    - Enable access levels and product access
  + Reports – See separate document
  + Opportunity Registrations – see separate document