

OPENTEXT

CS1691 – WWW Support Page

Functional Design

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Version 1.2

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Introduction

This Functional Design document is in support of project CS1691 – WWW Support Page (see the Project Charter for background information). The document contains all of the design elements required to provide a solution including those related to technical, functional, and business processes. See the Business Requirements document for details on specific functionality that must be included in the design.

Assumptions

The following individuals will provide functional design input for their respective teams or departments on a global basis unless otherwise noted:

- KC Team – Karen Weir
- IT – Clay Embry, Rachele DiTullio

These managers will review the functional design and provide sign off:

- Customer Support – David Slimmon, Program Manager
- IT – Nathan Pitts, Director IT, EBS Portal Team

Design Overview

Phased Approach

After careful consideration of the requirements and taking into account the parallel updates to the MySupport site, the team is proposing that a phased approach be used in order to roll out the full set of functions required to meet all of the business requirements.

Phase 1

This solution proposes that the WWW/Support page—with a focus on signing in to the MySupport portal, quick links to support tasks, gateway to some KC content, and information about support offerings—remain in WEM with an overhaul of the content and design.

- Updated page content and layout to support easier access to MySupport and KC tools and services
- User type integration to display different content and messages based on the user's logged in state and supported status
- Addition of Customer Alerts feed content from the KC, based on a supported customer's list of entitlements (products)

Phase 2

The next phase will look at changes to the MySupport home page to include content from the KC. The requirements will be reassessed after the parallel project for other updates to the MySupport site are deployed.

Phase 1 Design Details

Business Requirements

User Differentiation

1.1 – Sign In, Request Support Access, go to MySupport

There will be a prominent “call to action” message area on the page that will encourage users to get to the MySupport site. Since users must be logged in and be supported customers to get to the MySupport site, the message and options shown will vary depending on the user state (logged in vs not logged in) and user type.

- **Not logged In**
Will tell users to sign in for support and present link or button to log in.
- **Registered Visitor**
Will tell users to request an account upgrade to get support. Will present links to the support account request form.
- **Supported Customer**
Will present a link or button that says “Go to MySupport” which will take users directly to MySupport.

Solution

The WWW/Support page has different states depending on a user’s authentication (logged in or not) and support status (supported customer or not).

Not Logged In

This is the default state of the WWW/Support page. Any visitor to this page who is not signed in to OT Connect sees an option to “Sign in for Support”.

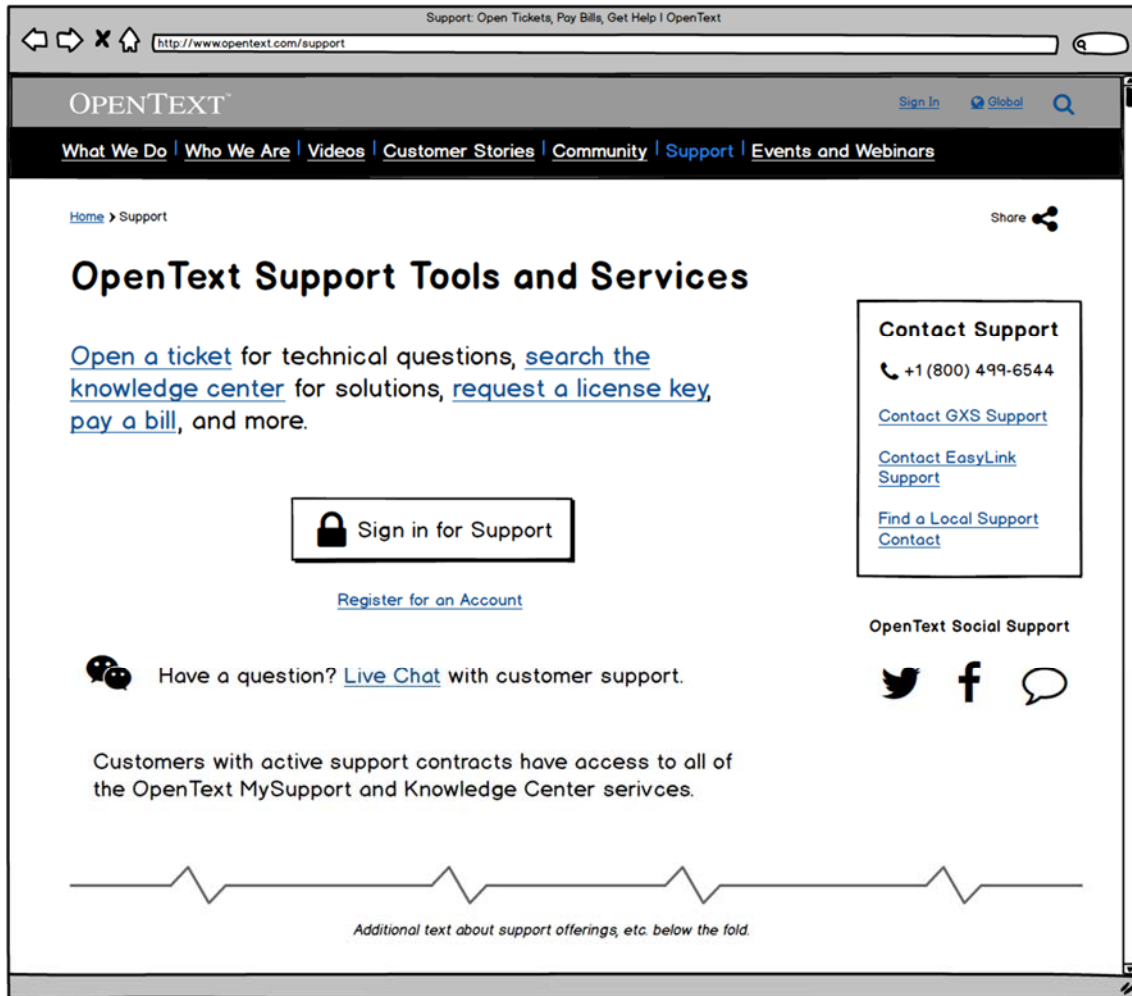


Figure 1 – Call to action for users who are not logged in

Clicking the “Sign in for Support” prompts the user to sign in to OT Connect.

Revision

During development, the technical team determined that implementing a new modal window method for sign in is not viable at this time. Instead, we will continue to use the current login functionality—redirecting the user to the CAMS login page.

The following screen shot is deprecated functionality.

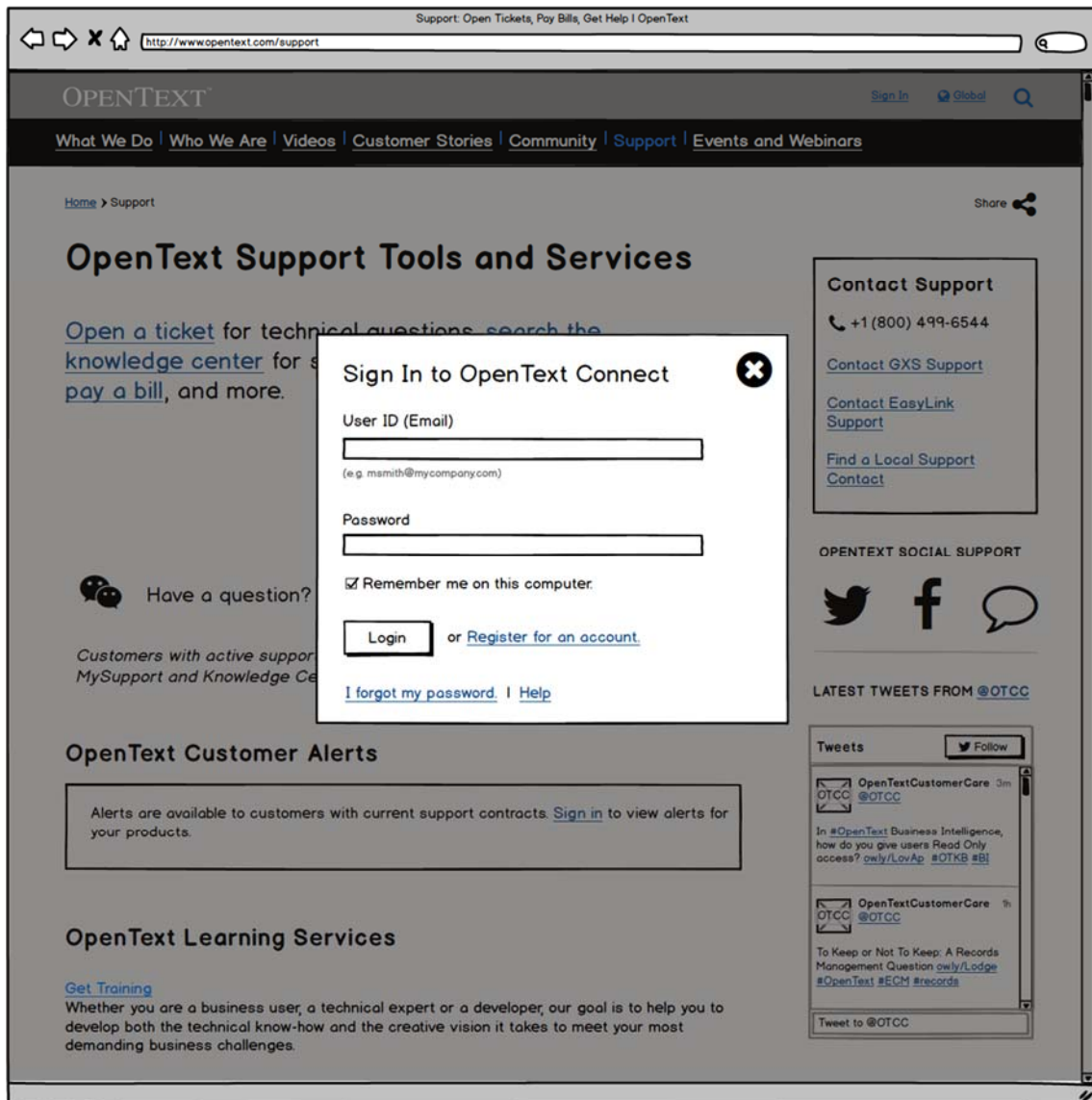


Figure 2 – OT Connect sign in box

After signing in, customers with active support contracts are redirected immediately to the MySupport portal home page. Registered visitors remain on the WWW/Support page.

Supplemental links in the sign in window—register, forgot password, and help—take the user away from the WWW/Support page to complete these activities. The user can return to the WWW/Support page by clicking the “Support” link in the global navigation.

Registered Visitor

The “Sign in for Support” button is replaced with a message explaining that support tools are available to customers only. Help links are provided.

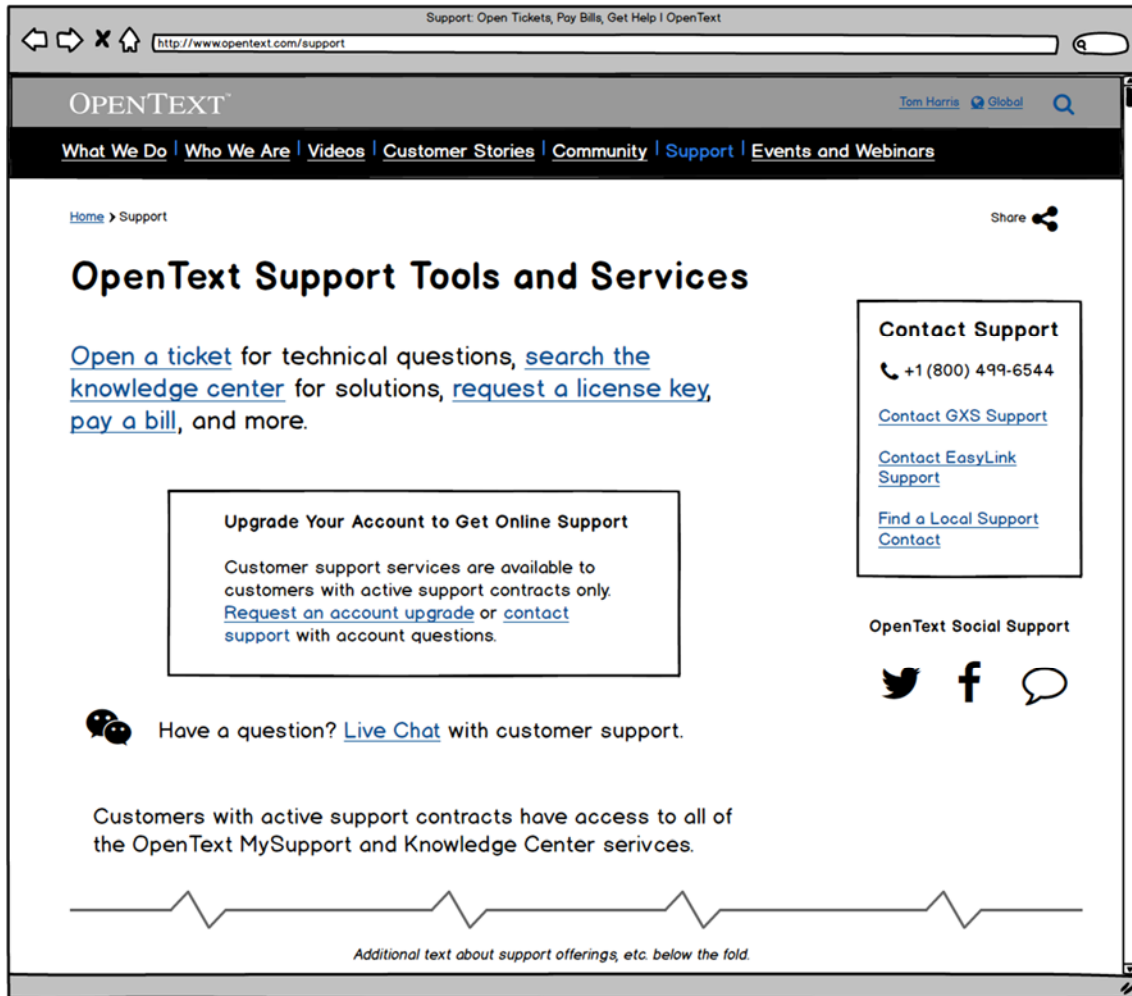


Figure 3 – Call to action for registered visitors

Supported Customer

When a supported customer who is already signed in to OT Connect visits the WWW/Support page, the “Sign in for Support” button is replaced with a “Go to MySupport” button that takes him to the MySupport home page.

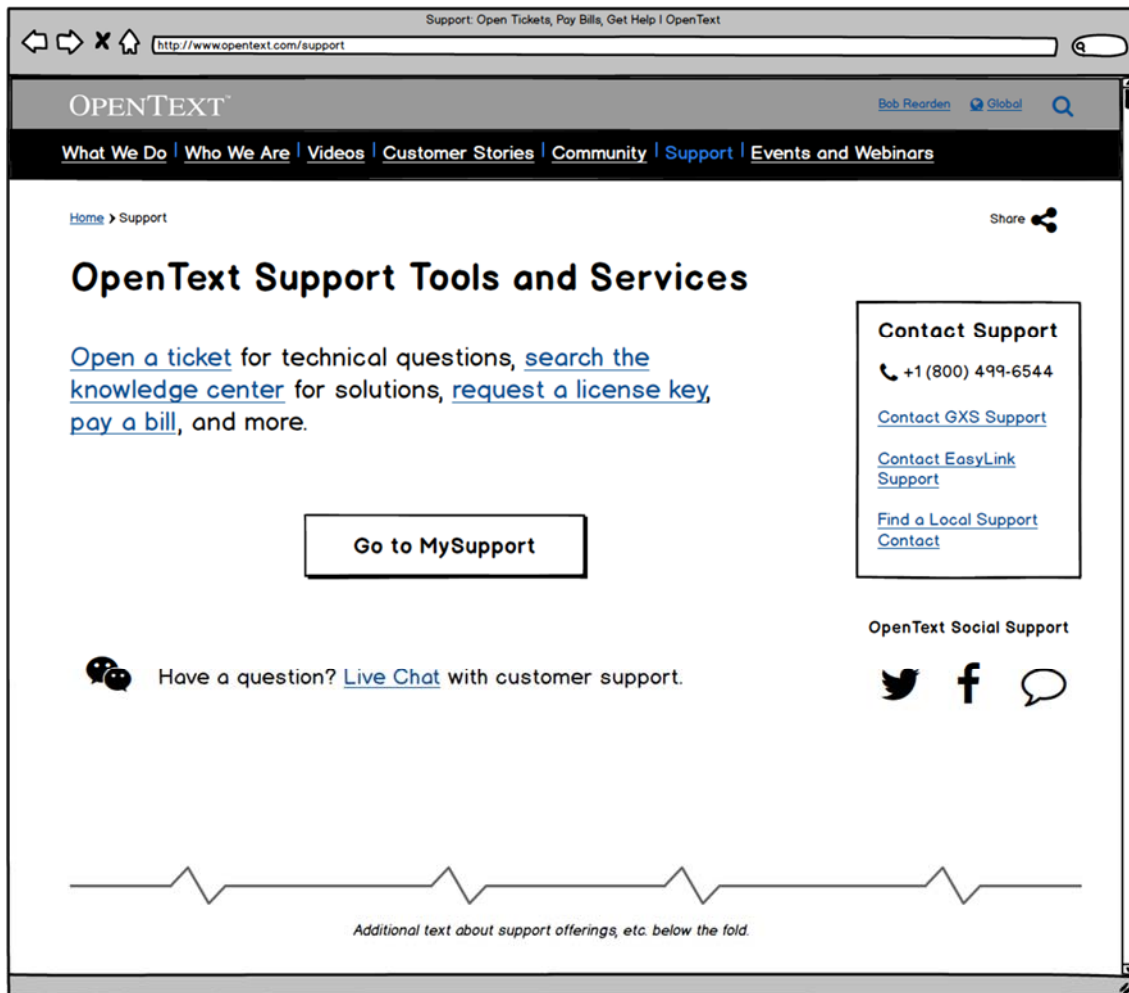


Figure 4 – Call to action for supported customers

1.2 – Links directly to Support assets and functions

There will be links directly to certain support assets and functions, like Knowledge Base, Open a Ticket, Pay a Bill. The behavior of these links will change depending on user state and user type.

- **Not logged in**
Will take user to login form. Then depending on user type, will either continue to selected support resource, or redirect back to WWW/support page.
- **Registered Visitor**
Will popup a window explaining that support account is required and giving links or form to request a support account.
- **Supported Customer**
Will take user directly to the MySupport or KC feature they selected.

Solution

These links and content are in WEM and can be updated or modified at any time by the content team. The options are not limited by what is used in the solution example.

Not Logged In

The MySupport quick links like “open a ticket” and the “live chat” link are visible so that all users can see the types of tasks they can access as a supported customer. When a user clicks one of these links, he is prompted to sign in to OT Connect.

If he later purchases a support contract, he will be familiar with the location and availability of these quick links.

Registered Visitor

If a registered visitor tries to access MySupport tools such as the “open a ticket” quick link, KC content such as a webinar, or the “live chat” feature, he sees an alert message that includes a link to request an account upgrade.

Revision

During development, the technical team determined that implementing a new modal window method for alerts is not viable at this time. Instead, we will continue to use the current functionality, redirecting a Registered Visitor to the ‘No Access’ page (https://login.opentext.com/connect/sso_controller-profile?sys_action=sso_noperms_kc_css) for any links to content for which they do not have authorization to access.

The following screen shot is deprecated functionality.

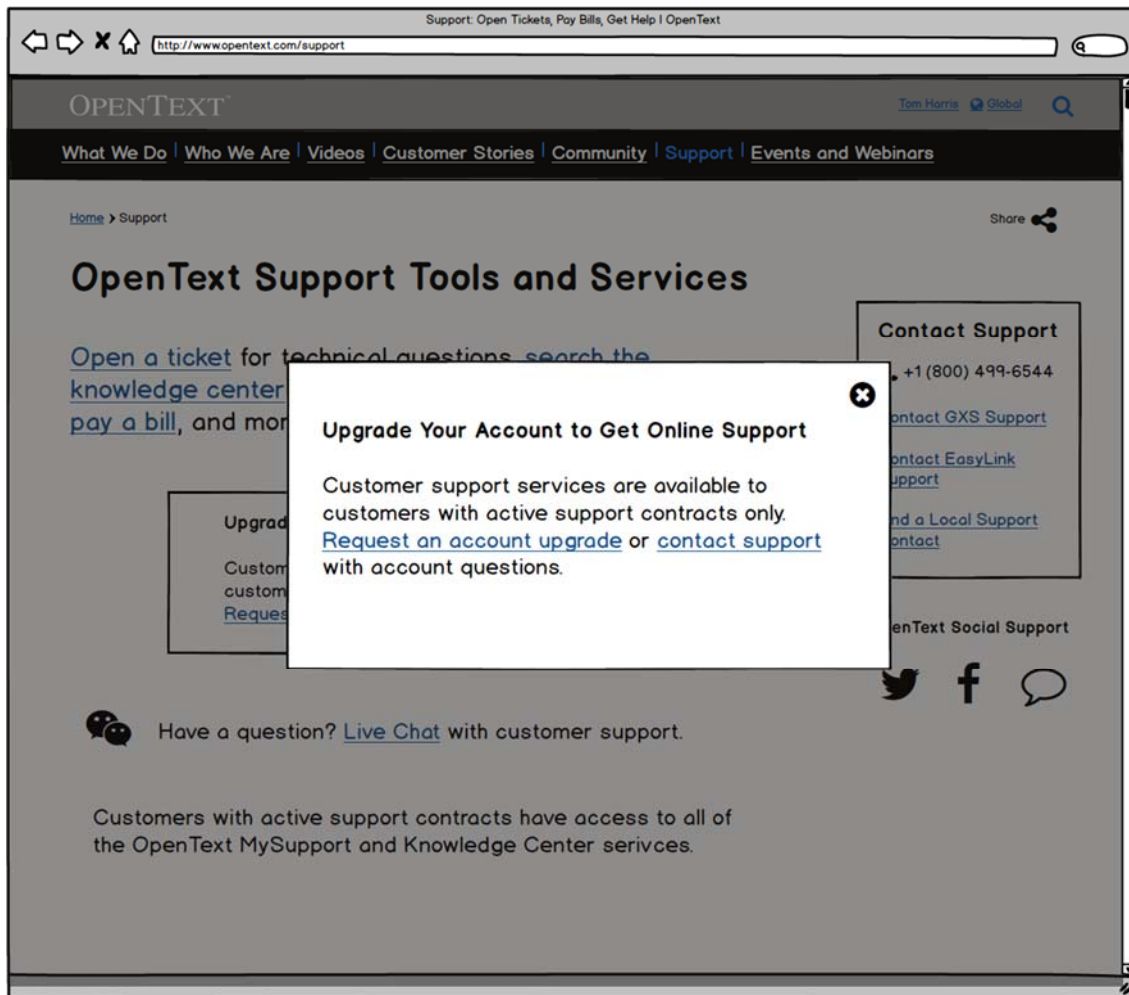


Figure 5 – Alert message for registered visitors

When he clicks the “request an account upgrade” link, he sees the account upgrade form to request access.

Revision

During development, the technical team determined that implementing a new modal window method for requesting an account upgrade is not viable at this time. Instead, we will redirect the user to the current upgrade request form. (https://login.opentext.com/connect/sso_controller-profile?sys_action=requestsiteaccess_kc_css)

The following screen shot is deprecated functionality.

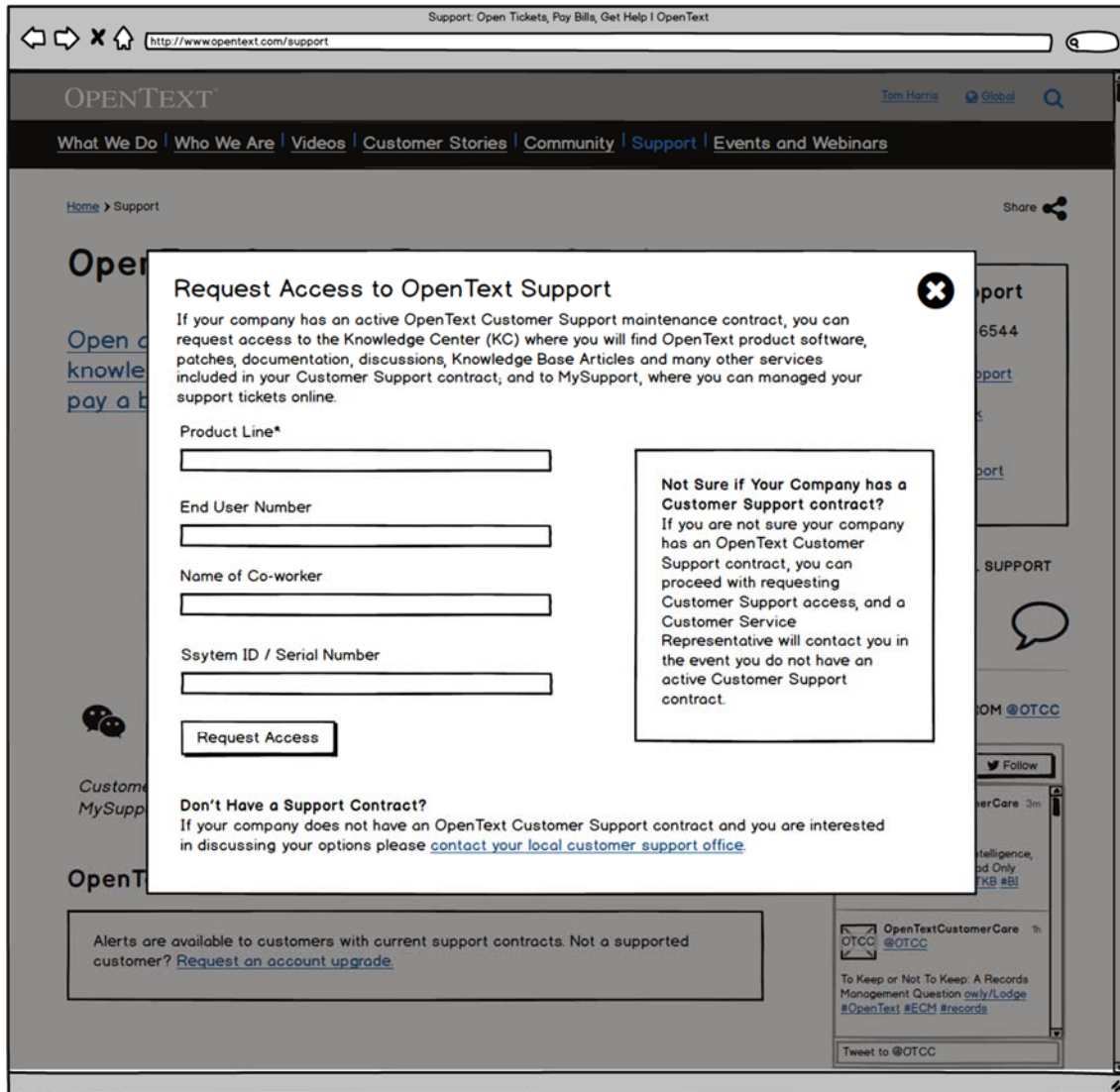


Figure 6 – Request account upgrade form

Supported Customer

The task quick links, live chat, webinars, and customer alerts take supported customers to the appropriate MySupport or KC page.

Feeds and Content

The WWW/Support page contains six content areas below the “call to action” area at the top.

Support: Open Tickets, Pay Bills, Get Help | OpenText

OPENTEXT [Sign In](#) [Global](#)

[What We Do](#) | [Who We Are](#) | [Videos](#) | [Customer Stories](#) | [Community](#) | [Support](#) | [Events and Webinars](#)

[Home](#) > [Support](#) Share

OpenText Support Tools and Services

[Open a ticket](#) for technical questions, [search the knowledge center](#) for solutions, [request a license key](#), [pay a bill](#), and more.

[Sign in for Support](#)

[Register for an Account](#)

Have a question? [Live Chat](#) with customer support.

Customers with active support contracts have access to all of the OpenText MySupport and Knowledge Center services.

Contact Support

+1 (800) 499-6544

[Contact GXS Support](#)

[Contact EasyLink Support](#)

[Find a Local Support Contact](#)

OPENTEXT SOCIAL SUPPORT

2.5 LATEST TWEETS FROM @OTCC

Tweets [Follow](#)

OpenTextCustomerCare 3m
In #OpenText Business Intelligence, how do you give users Read Only access? [swr/LvAjg](#) [#OTCS](#) [#BI](#)

OpenTextCustomerCare 1h
To Keep or Not To Keep: A Records Management Question [swr/LvAjg](#) [#OpenText](#) [#ECM](#) [#records](#)

[Tweet to @OTCC](#)

2.6 OPENTEXT ONLINE BLOG

[To Keep or Not to Keep: A Records Management Question](#)
By **Kiera Obbard**
April 8, 2015

[Managing Your Business Processes](#)
By **Kiera Obbard**
March 31, 2015

[Creating a Sustainable Future: Earth Hours 2015](#)
By **Kiera Obbard**
March 27, 2015

[More blog articles >](#)

2.3 OpenText Customer Alerts

Alerts are available to customers with current support contracts. [Sign in](#) to view alerts for your products.

2.1 OpenText Learning Services

[Get Training](#)
Whether you are a business user, a technical expert or a developer, our goal is to help you to develop both the technical know-how and the creative vision it takes to meet your most demanding business challenges.

[Get Certified](#)
OpenText Certification Programs are intense and interactive sessions designed to maximize participants understanding of the OpenText product suite.

[Get Adoption](#)
In addition to the regular course schedule, we offer a variety of consulting services to optimize your learning efforts and accelerate user adoption.

[Download the Global Customer Service eBook >](#)

[OpenText Online Support Infographic >](#)

2.4 OPENTEXT PRODUCT SUPPORT PROGRAMS

Premier Anywhere

Proactive and preventive support tailored to your specific business needs to help prevent problems, speed up resolution times, and simplify deployments and upgrades. Our top-of-the-line program includes assigned resources and deliverables, plus support for all issues—24 hours a day, 7 days a week, 365 days a year.

[Learn more >](#)

Anytime

Critical issue support for the OpenText applications powering your key business processes.

[Learn more >](#)

2.2 KNOWLEDGE CENTER WEBINARS

APR 06 [Achieving Efficient Matter Centric Document and Email Management \(log in required\)](#)

MAR 30 [Document and Asset Management Integrations for WSM \(log in required\)](#)

JAN 20 [OpenText Enterprise Connect & Office Editor 10.5.2 \(log in required\)](#)

[More webinars >](#)

Figure 7 – WWW/Support page layout and content for users who are not logged in

2.1 – Training Links

Provide links to training resources.

[Get Training](#)

Whether you are a business user, a technical expert or a developer, our goal is to help you to develop both the technical know-how and the creative vision it takes to meet your most demanding business challenges.

[Get Certified](#)

OpenText Certification Programs are intense and interactive sessions designed to maximize participants understanding of the OpenText product suite.

[Get Adoption](#)

In addition to the regular course schedule, we offer a variety of consulting services to optimize your learning efforts and accelerate user adoption.

[Global Customer Service eBook](#)

[Online Support Infograph on SlideShare](#)

Solution

The training content is located between the Customer Alerts and Support Programs section and can be edited or updated easily by the content team using WEM. It is visible to all users and includes links to learning services webpages, the customer service PDF, and the online support infographic on Slideshare.

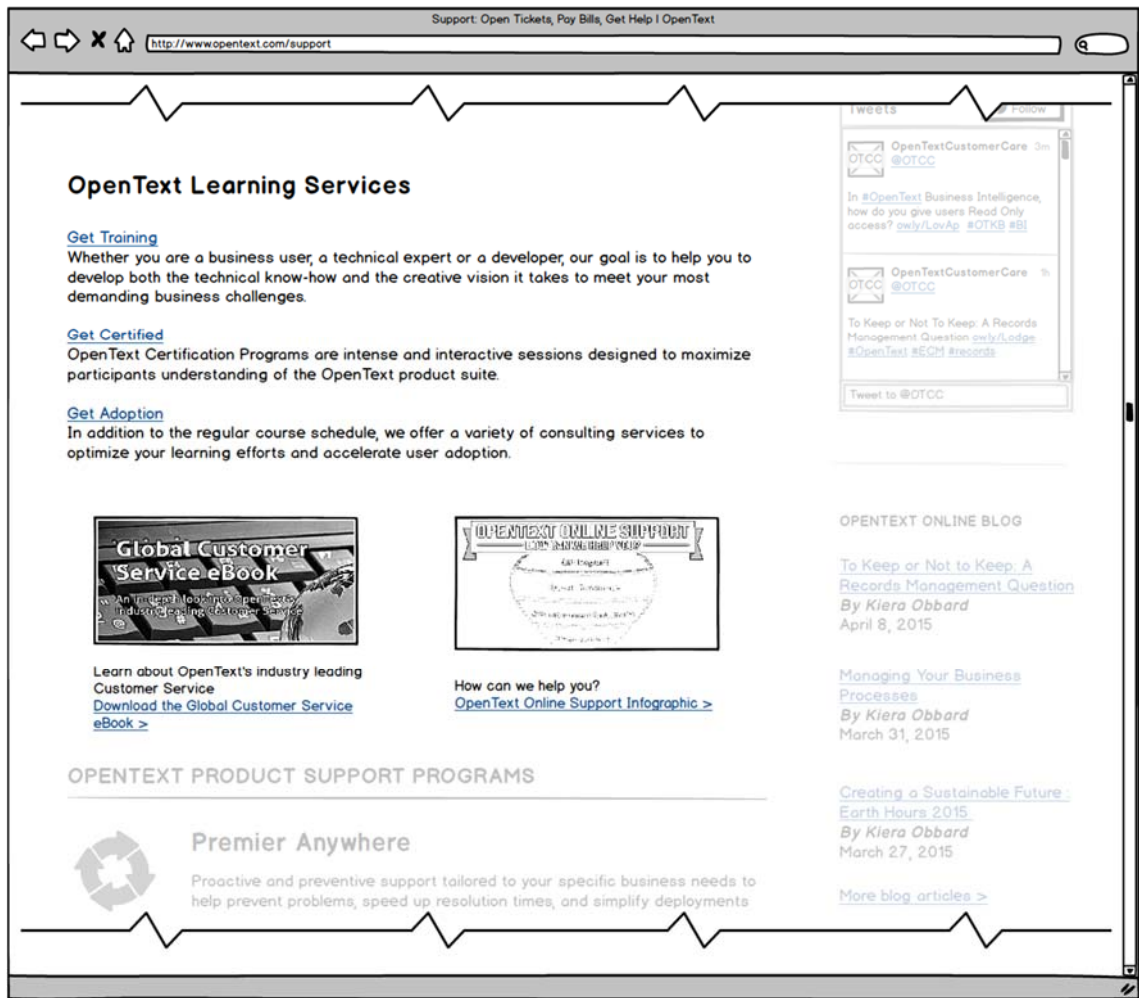


Figure 8 – Training content

2.2 Webinars

Provide feeds of upcoming and pre-recorded customer support webinars. The webinar links will require login to KC.

Solution

The webinars list is populated by a feed, similar to existing functionality on the “Events and Webcasts” page. The webinar list is located in the sidebar below the blog feed and formatted automatically using an existing display view in WEM for formatting webinar lists. The list of webinars is curated by the content team and can include publically available webinars as well as those that require a supported customer account log in.

- Users who click a webinar link requiring log in are prompted to sign in to OT Connect. If the user does not have a support contract, he then sees an alert message, as outlined in [requirement 1.2](#).

- Registered visitors who click a webinar link requiring a support contract see an alert message, as outlined in [requirement 1.2](#).
- Supported customers who click a webinar link requiring a contract are redirected to the webinar page in the KC.

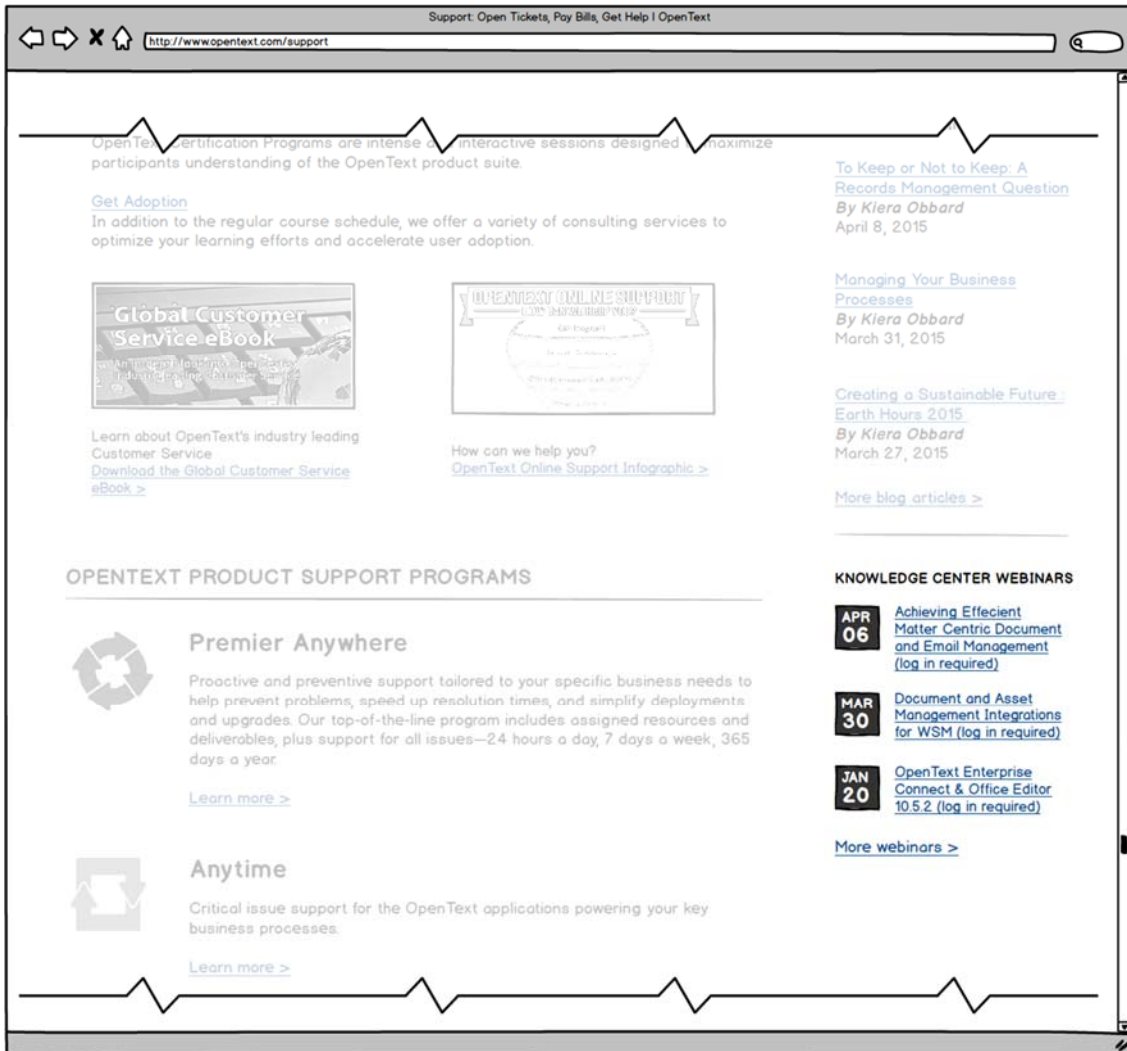


Figure 9 – Webinar list in the sidebar

2.3 Alerts

Provide feeds of most recent customer alerts from

<https://knowledge.opentext.com/knowledge/cs.dll/open/3279562>

These would only be for users with access to support. Other users will see a placeholder for this content.

Solution

This requirement could have a dependency on Marketing to provide new HTML/CSS design for displaying alerts for supported customers.

Not Logged In

Users see a sign in link in the customer alerts section notifying them that if they are supported customers, they can sign in to see alerts for their products.

If they click the sign in link, they are prompted to log in to OT Connect.



Figure 10 – Alerts box for users not logged in

Registered Visitor

The customer alerts message changes to provide a link to request an account upgrade.

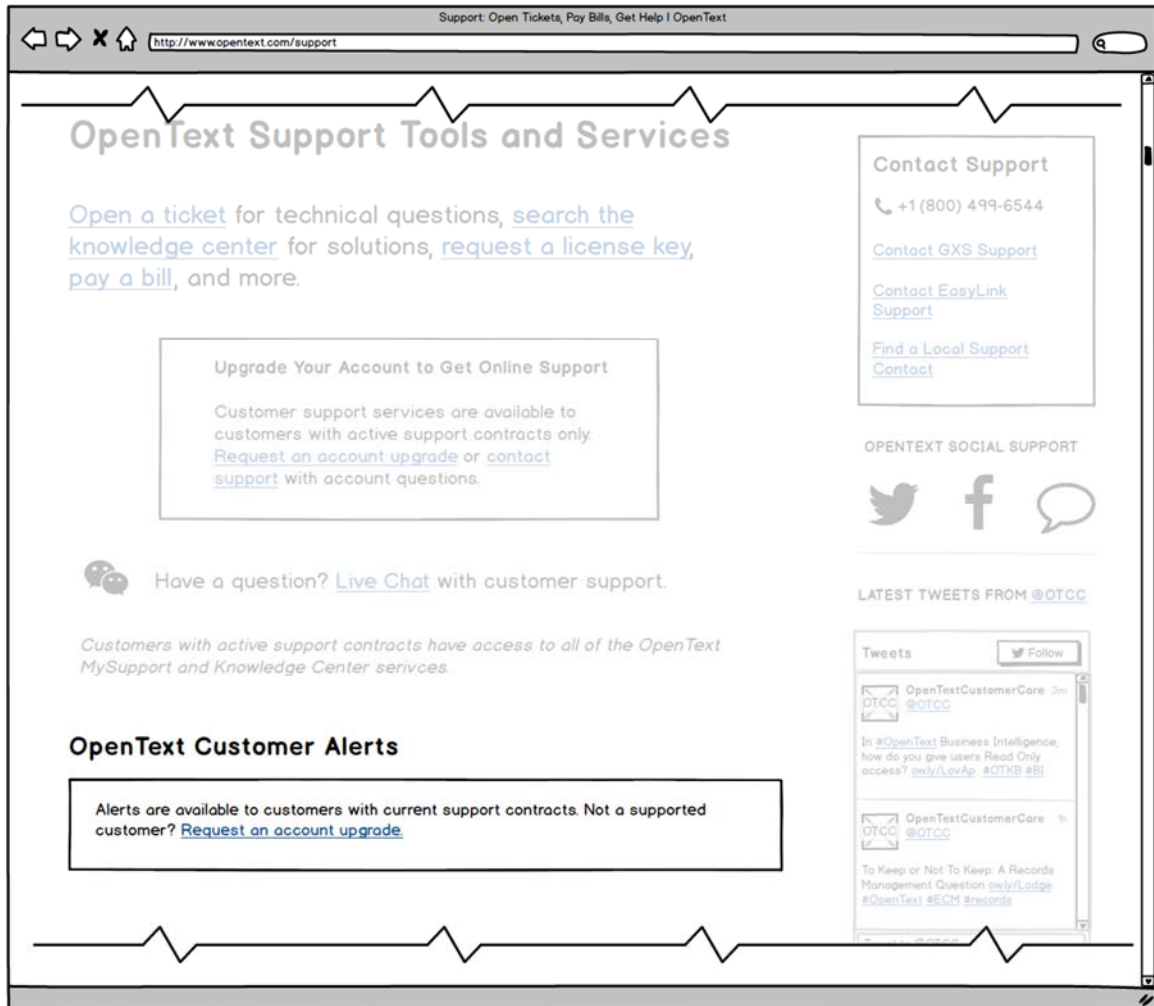


Figure 11 – Alerts box for registered visitors

Supported Customer

When a supported customer clicks the “sign in” button in the Customer Alerts section and is logged in, he will remain on the WWW/Support page so that he may view his list of alerts.

Alerts for the customer’s products display in this section. They are arranged by product, then by alert type for each product: Customer Advisories, Security Alerts, and Technical Alerts.

No alerts display by default. The customer must select a product from the product lookup. He can choose a different product at any time and the list of alerts will update. If possible, we will restrict the list to the customer’s entitlements only.

Only alerts for the last 90 days are displayed. The help text includes a link to view more alerts in the KC.

If the customer clicks the link for a specific advisory, he is taken to the advisory’s page in the KC.

If there are no alerts for a product or category, a help message displays with a link to the KC to view archived alerts.

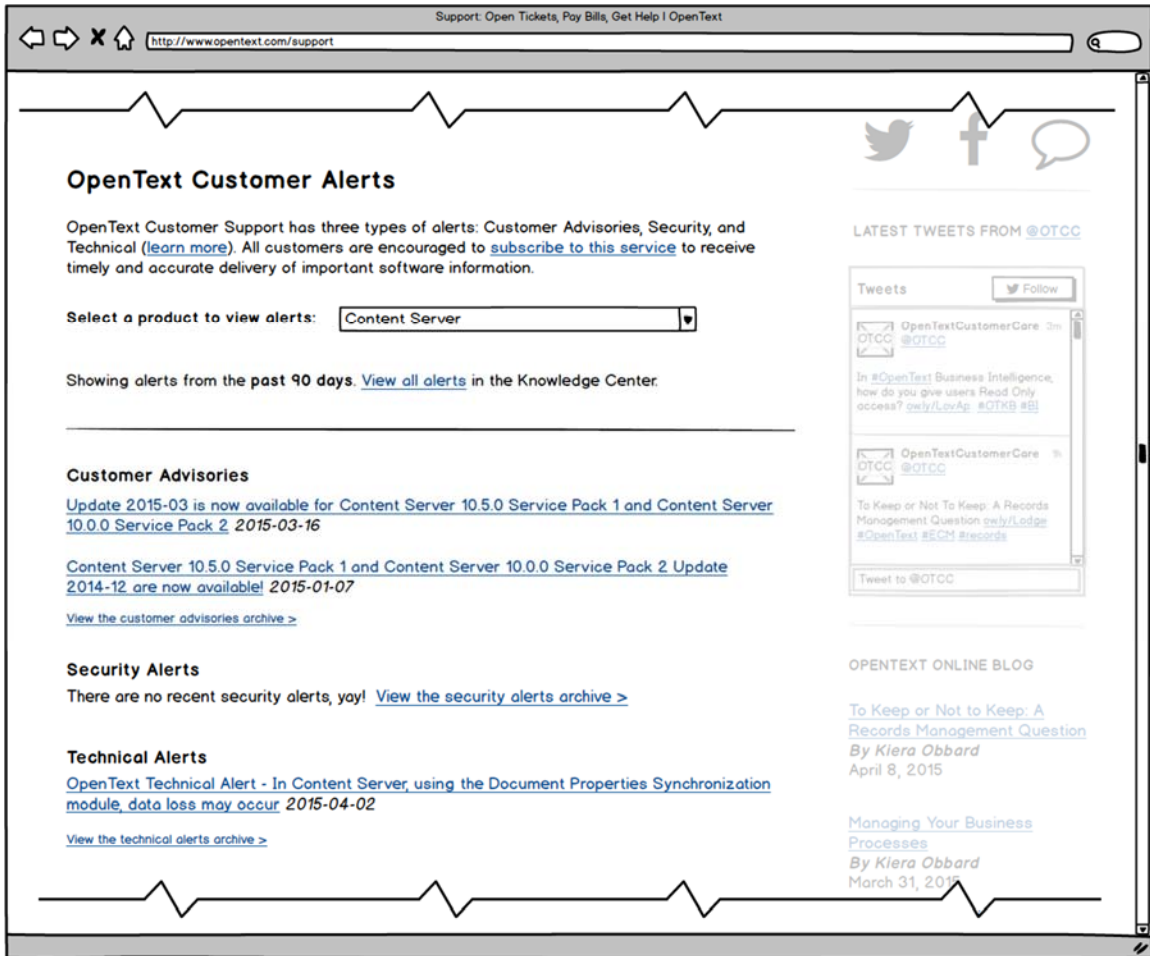


Figure 12 – Customer alerts for supported customers

2.4 Support Programs

Keep existing information about Support Programs on WWW/support.

Solution

No changes required. The same content is available to all users and can be edited or updated easily by the content team using WEM.

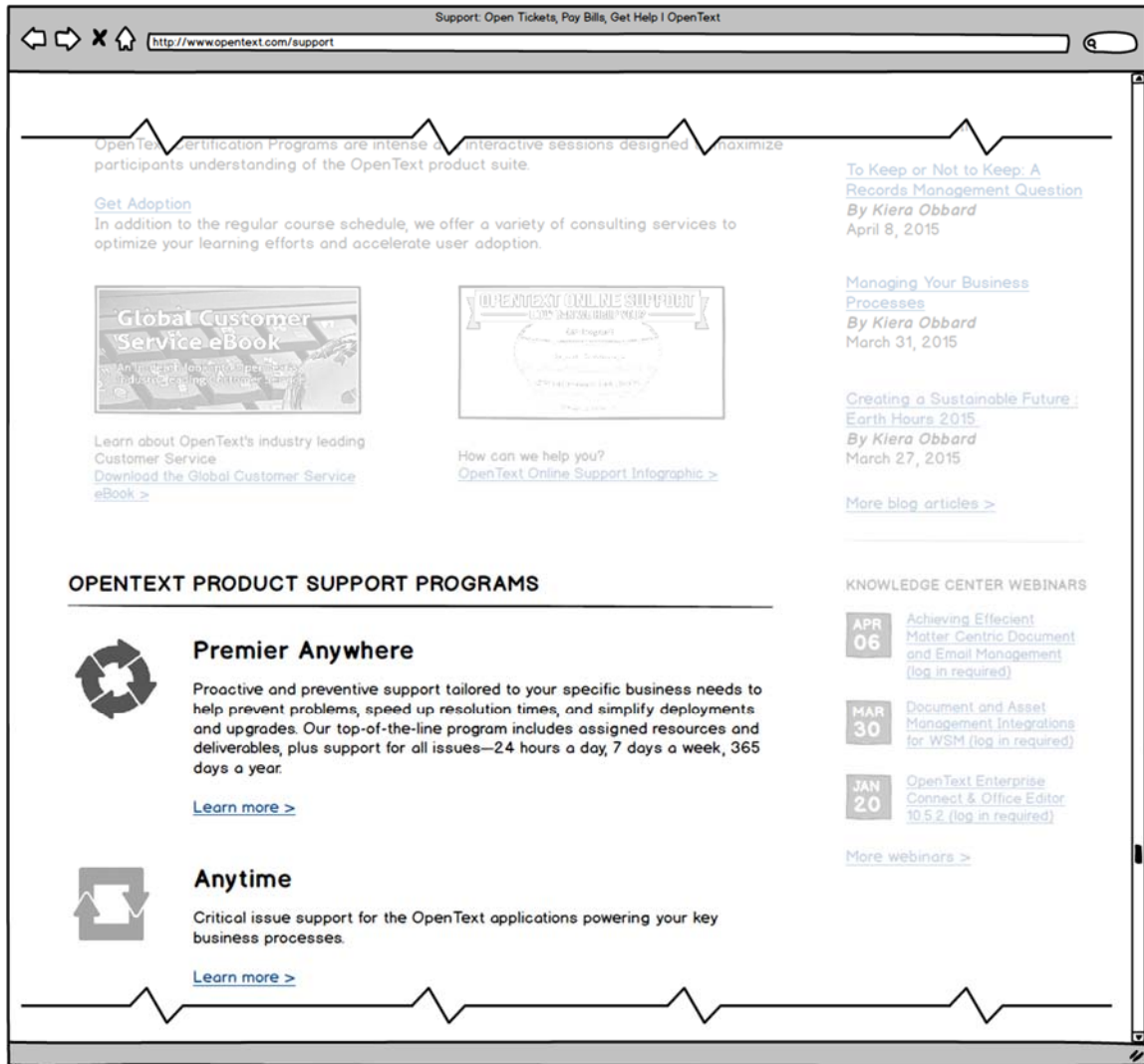


Figure 13 – Support program content

2.5 @OTCC Twitter Feed

Keep existing Twitter feed on WWW/support

Solution

No changes required. Twitter feed is available to all users. It utilizes Twitter's own embed code and displays tweets from the @OTCC account.

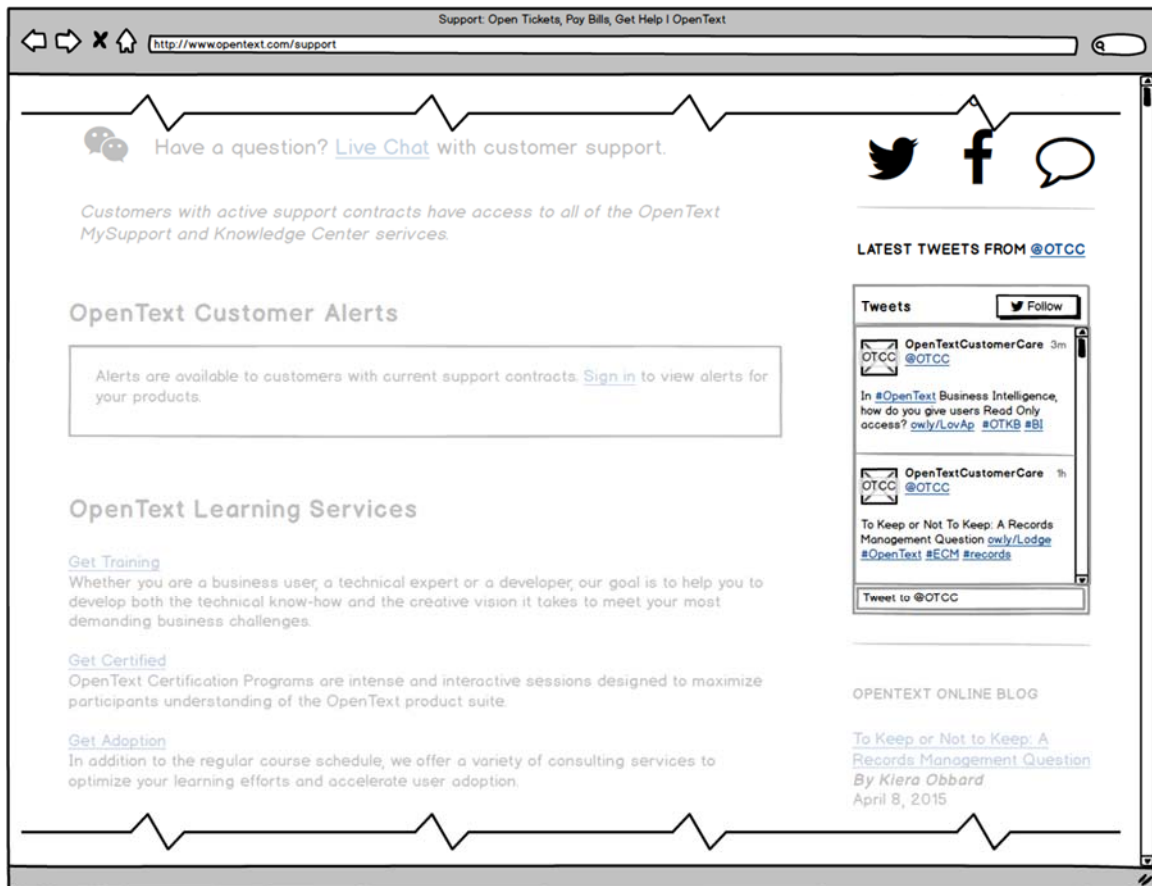


Figure 14 – Twitter feed in the sidebar

2.6 OTCC Blog Feed

Show the Blog feed for <http://www.opentext.com/portal/site/communities/opentext-online>

Solution

The blog feed is populated using the RSS feed from the *OpenText Online* blog. It is located in the sidebar below the Twitter feed and formatted and updated automatically using an existing display view in WEM for formatting blog feeds. Clicking a blog link takes the user to the blog article page in the Community site.



Figure 15 – OpenText Online blog feed in sidebar

Considerations

Mobile Display

Though mobile isn't a specific requirement for this project, responsive design is a dependency since it is incorporated into the current WEM site design. Changes and additions to WWW/Support page content should utilize the existing framework.

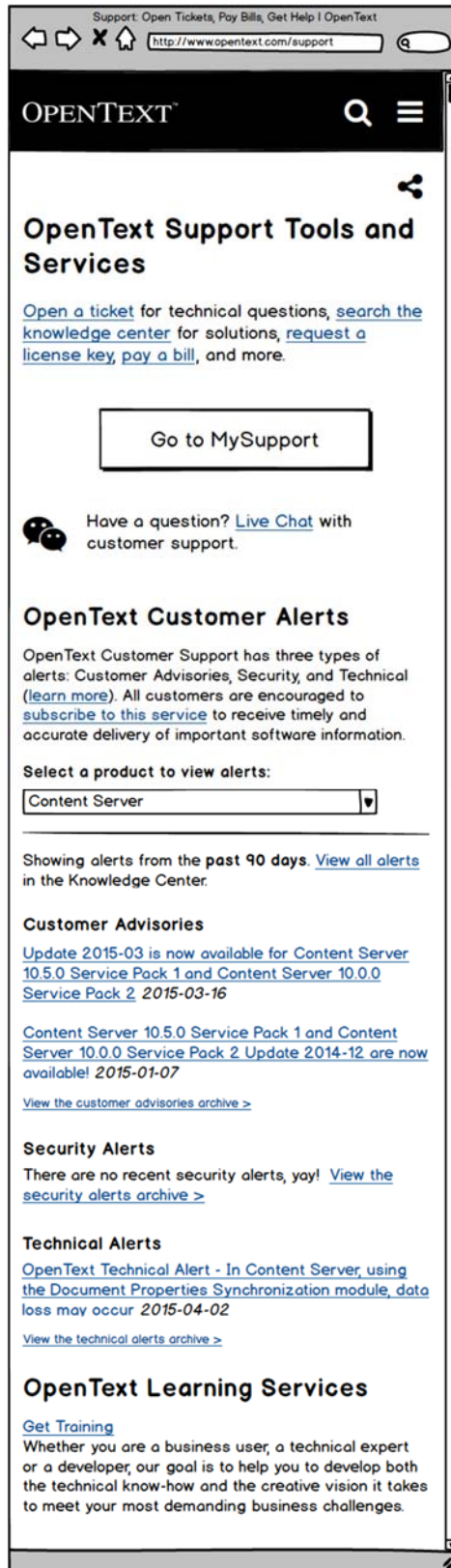


Figure 16 – Supported customer mobile view with customer alerts

For additional information, please contact:

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OpenText Corporation