opentext™

The Information Company™

Functional Design

Project 900923087 – Covisint Support Portal Integration

Prepared By:

Rachele DiTullio
Information Architect, IT Enterprise Business Systems – Web Team, OpenText

Date: 24 April 2018

Table of Contents

Introduction

This Functional Design document is in support of project 900923087 - Covisint EBS Integration (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.

Design Overview

This solution proposes that the current Covisint Support Portal on HP and CRT ticketing system have a new user interface utilizing Liferay as a front end that will feed ticket data into Siebel and SM9.

Please refer to the sitemap for an outline of the pages/screen addressed in this document.

Please refer to the full wireframes for examples of different screen states beyond what is shown for clarity in this document.

Design Details

Functional Design ID	Business Requirement ID	Description
FD01	C-NF001	Ability to auto-provision defined users into the Support Portal through a feed from CCA (Covisint Connection & Administration: commercial infrastructure tool)
FD02	C-A083	Need to be able to contractually adhere to custom customer security policy changes, and not breach SOC audit rules
FD03	C-NF002	Ticket integration (tickets to be opened, reviewed, edited, closed, etc. through the Portal)
FD04	C-SC064	Account setup needs to be configured so that information populates appropriately when tickets are opened: Customers Suppliers Partners End Users
FD05	C-NF002	Ability to receive tickets from unknown or guest users. We use this to track tickets from potential users who have not yet registered for Covisint services.
FD06	C-NF002	Ticketing system must support multiple languages

FD07	C-NF004	Ability to access Chat, available in English, German, Portuguese, Spanish, (Chinese, Korean, Japanese, French)
FD08	C-NF002	Ability to access Knowledge Base, with or without authentication (English, German, Portuguese and Spanish) for targeted Automotive Portal articles and audiences
FD09	C-DM005	HP eKMS - We need an export of the data currently stored in the HP Knowledge Base. These articles will be reviewed and then potentially imported into the new Support Portal
FD10	C-NP008	Ability to add, review and view knowledge articles. Ability to sort by content type, solution, etc. Ability to require review/approval before posting new/updated articles.
FD11	C-NP008	Ability to search the knowledge base for articles
FD12	C-NF002	Ability to direct users to appropriate Support areas based on Product/Service in question, keeping in mind language and time zone considerations
FD13	C-G004	Ability to direct Automotive Portal users to Level 1 Support and other Covisint users to Level 2+ Support from Covisint landing page.
FD14	C-NF002	Portal needs to include Covisint branding
FD15	C-NF002	Support SSO capability so that customers, suppliers and end users already in the Automotive Portal can easily access support, already authenticated
FD16	C-NF002	Ability to display alerts and system status messages to deflect calls in case of outages
FD17	C-NF002	Ability for users and guests to find support phone numbers based on product and geographical region
FD18	C-NP011	Ability to add additional customers or users as cc's to the ticket
FD19	C-A051	Ability to identify the primary language for ticket
FD20	C-A054	Ability to add attachments (ie. gif, pdf, doc, txt, xls, etc.) to the ticket either by the requestor or the service desk agent
FD21	C-A056	Ability to add internal comments visible only to the support team, while correspondence visible to the requestor/cc's
FD22	C-A092	Ability to print tickets in form format
FD23	Change request 001	Amendment to C-NF002 and C-BC002

		Support Portal is mobile device friendly
FD24		Comply with Accessibility for Ontarians with Disabilities Act, 2005

SSO/SAML

FD01: Auto-provision users

Ability to auto-provision defined users into the Support Portal through a feed from CCA (Covisint Connection & Administration: Commercial infrastructure tool).

- 583K active IDs in Covisint commercial infrastructure
- While total ticket count is around 8K per month, it is impossible to predict which of the 583K Active IDs will require support
- Current hits to the HP portal are around 10K per month

Solution

Siebel will become a new destination system for the Covisint Identity Management IDSync process, which is a real-time ID synchronization of user data. There are four basic types of existing Covisint Connect IDSync synchronization updates: Grant, Update/Sync, Suspend, and Remove. These files are sent today to Covisint Customers/Portals for ID Sync. Siebel will consume these files and create/modify/etc. user accounts as directed. Siebel will not remove (delete) contact records from the database, but it will remove the Covisint Customer Account associations from Contacts as directed.

We will create a new database column on the Siebel Contact table to store the Covisint Account ID for Covisint Portal Users. The Covisint Account ID will be a unique ID in Siebel that will only refer to login access to the Covisint Portal, and will be a unique ID per Siebel Contact Record (there will not be more than one Siebel Contact record with a given Covisint Account ID). At the Siebel Account level, we will add a database column to store the Covisint Organization ID, which will also be a unique ID per Siebel Account.

Siebel will use the Covisint Account ID and Covisint Organization ID to make user/account relationships. At the Siebel Account level, Accounts/Suppliers will be "granted access" to Covisint Customer Accounts via one of the two existing Siebel Trading Partner relationship mechanisms, most likely via the Trading Partner Asset functionality that we use today for the B2B Dell Portal customers/suppliers/trading partners as it provides the most flexibility.

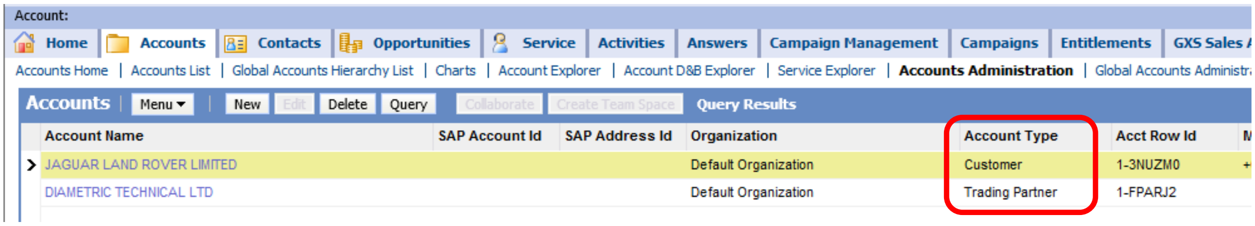
This is an example of one of the XML instructions currently sent today by CCA that Siebel will consume (this is UserProfile_UPDATE):


```
<SYNC_PERSONNEL_005>
    <CNTROLAREA>
        <BSR>
            <VERB>SYNC</VERB>
            <NOUN>PERSONNEL</NOUN>
            <REVISION>005</REVISION>
        </BSR>
        <SENDER>
            <LOGICALID>exlsq053</LOGICALID>
            <COMPONENT>DELPHI_CCA:5466127</COMPONENT>
            <TASK>USERPROFILE</TASK>
```

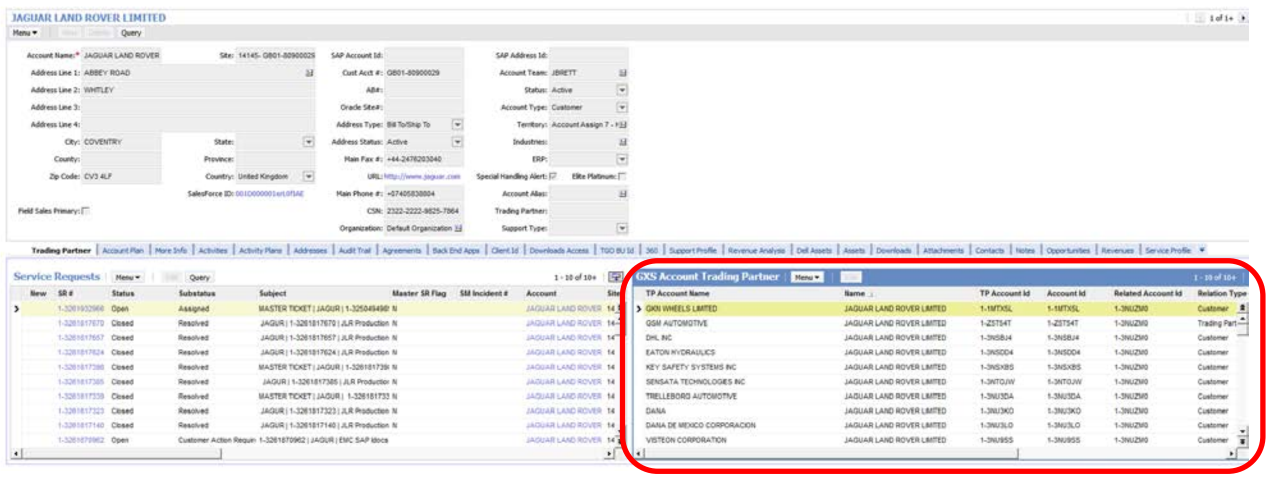
```
            <REFERENCEID>231815</REFERENCEID>
            <CONFIRMATION>2</CONFIRMATION>
            <LANGUAGE>ENG</LANGUAGE>
            <CODEPAGE>ISO-8859-1</CODEPAGE>
            <AUTHID>DELPHIADMIN01</AUTHID>
        </SENDER>
        <DATETIME qualifier="CREATION">
            <YEAR>2018</YEAR>
            <MONTH>2</MONTH>
            <DAY>23</DAY>
            <HOUR>12</HOUR>
            <MINUTE>39</MINUTE>
            <SECOND>51</SECOND>
            <SUBSECOND>187</SUBSECOND>
            <TIMEZONE>0000</TIMEZONE>
        </DATETIME>
    </CNTROLAREA>
    <DATAAREA>
        <SYNC_PERSONNEL>
            <PERSONNEL>
                <EMPLOYEEID>DELPHIADMIN01</EMPLOYEEID>
                <SYNCIND>UPDATE</SYNCIND>
                <NAME index="1"/>
                <NAME index="2">AutoAdmin01</NAME>
                <NAME index="3"/>
                <NAME index="4">Automation</NAME>
                <POSITION/>
                <USERAREA>
                    <COVISINT.SYNC_PERSONNEL_005.PERSONNEL.USERAREA>
                        <ADDRESS>
                            <ADDRLINE index="1">1441 West Long BR</ADDRLINE>
                            <ADDRLINE index="2"/>
                            <ADDRLINE index="3"/>
                            <CITY>Troy</CITY>
                            <COUNTRY>US</COUNTRY>
                            <FAX index="1"/>
                            <POSTALCODE>48098</POSTALCODE>
                            <STATEPROVN>MI</STATEPROVN>
                            <TELEPHONE index="1">46103888738</TELEPHONE>
                            <TELEPHONE index="2"/>
                        </ADDRESS>
                        <EMAIL>zinnia.pallai@covisint.com</EMAIL>
                        <covisint.PREFERREDLANGUAGE>en</covisint.PREFERREDLANGUAGE>
                    </COVISINT.SYNC_PERSONNEL_005.PERSONNEL.USERAREA>
                </USERAREA>
            </PERSONNEL>
        </SYNC_PERSONNEL>
    </DATAAREA>
</SYNC_PERSONNEL_005>
```


Based on these XML files, Siebel will be able to create new users in real time, associate users based on their Covisint Account ID to Covisint Customer Accounts, and dis-associated users from Covisint Customer Accounts.

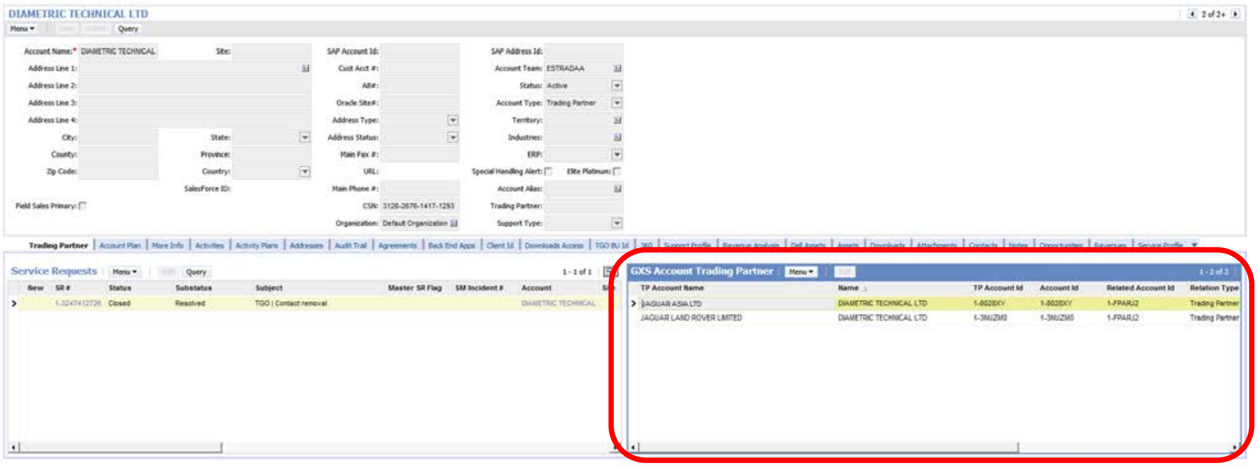
As an example of how the Covisint ID association will work in Siebel, a Covisint Customer Account and a Covisint Customer's Supplier Account will both live in Siebel as Siebel Accounts. The Covisint Customer Account will have an Account Type of Customer, and the Covisint Customer's Supplier Account will have an Account Type of Trading Partner. This is an example of a Jaguar Land Rover Account and a Trading Partner in Siebel today: 1-FPARJ2 or 1-3NUZM0



At the Customer Account level, there will be a view of all associated Supplier/Trading Partner accounts:

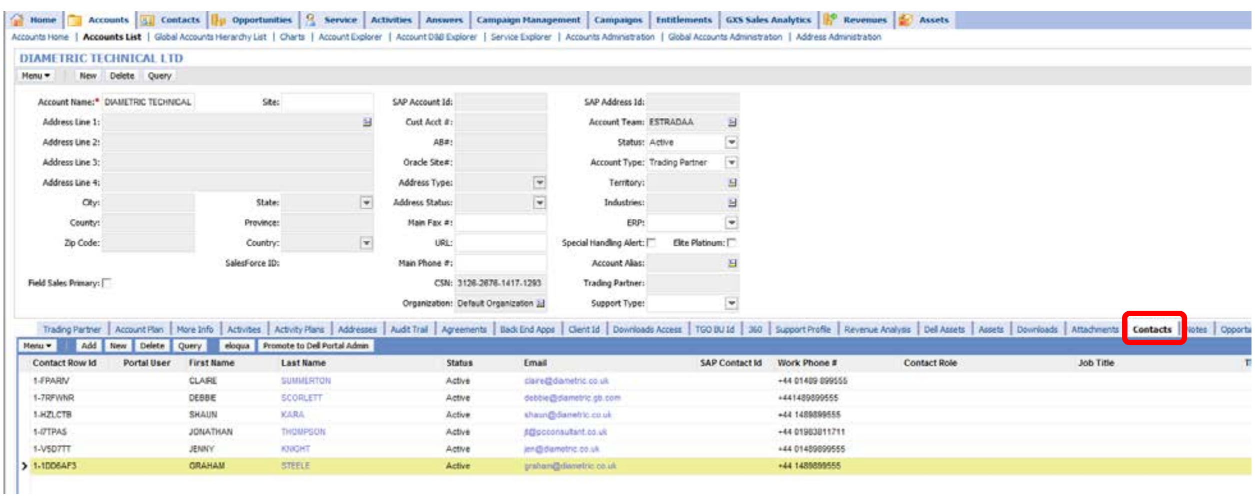


Likewise, at the Supplier/Trading Partner account level, there will be a view of all associated Customer Accounts:



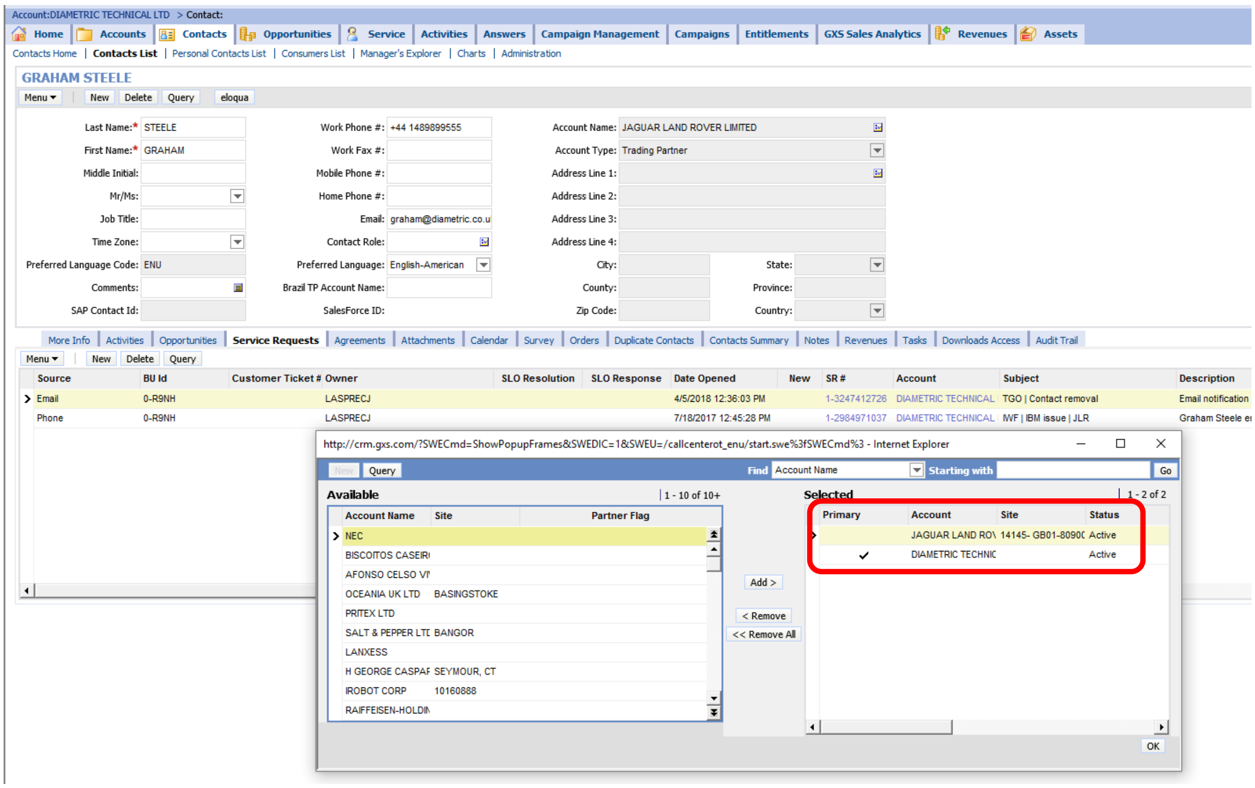
In each case, the Covisint Org/Supplier ID for these accounts will also be associated to each of the Siebel Account records at the Siebel table/database level and will be exposed in the Siebel UI for reference, but these IDs cannot be updated manually. Note that the Covisint Org/Supplier ID will be unique to one Siebel Account Record (will be a 1:1 relationship, or one Covisint ID cannot exist on multiple Siebel Account IDs).

Similarly, each Siebel Account record will store Employee Contacts, with the Covisint Account ID (Covisint Portal User ID) being stored at each synchronized Contact record.

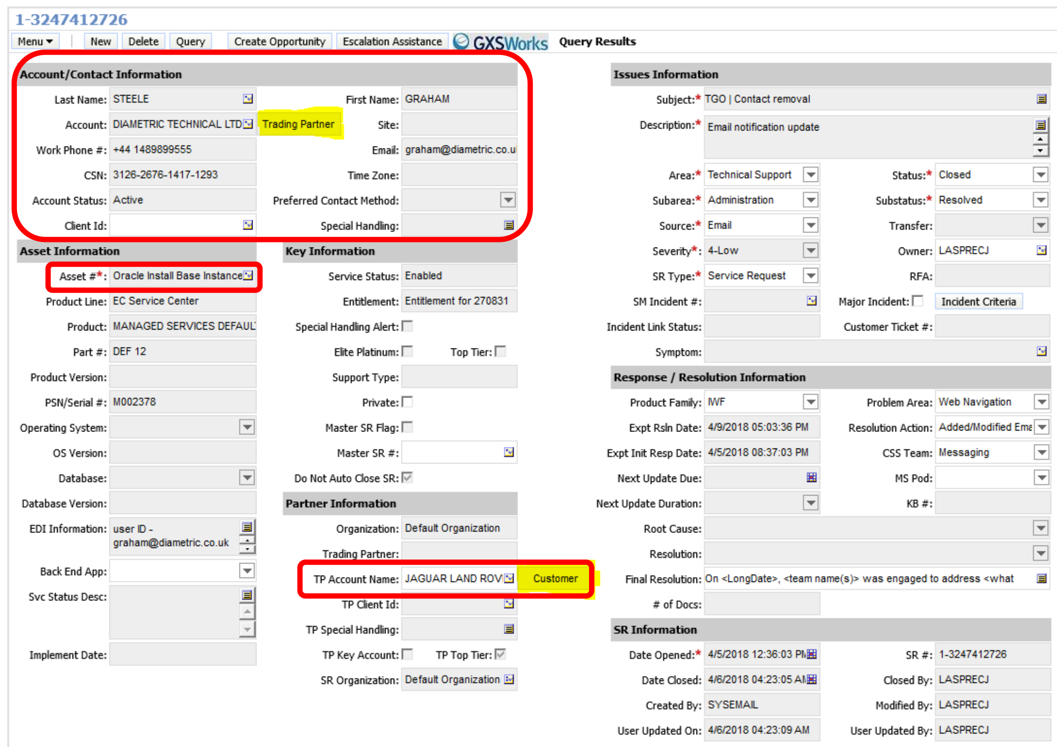


Note that the Covisint Account ID (Covisint Portal User ID) will be unique to one Siebel Contact Record (will be a 1:1 relationship, or one Covisint ID cannot exist on multiple Siebel Account IDs).

It is within the Contact record itself where the access associations will be made. A Contact record will be associated with their company as the Primary account on their contact record, and they will then be associated with any Covisint Customer Accounts that they have been approved to open Service Requests against. If an instruction is sent to remove a user from having access to a Covisint Account, the dis-association will be made at this level as well.



As Service Requests are created in Siebel from the Covisint Portal using this type of relationship, the SR “Account” field will be populated with the Trading Partner/Supplier Account name and Contact information, the Covisint Account will be listed in the “Partner Information” section of the SR, and the Asset will be the Covisint Account’s Asset.



It is important to note that, for purposes of this initial Covisint Portal build, if a Covisint Portal customer already exists in Siebel as a Contact and has access to the Siebel Customer Portal, a new/incremental Contact record will be added to Siebel and associated to a new/incremental Covisint Account in Siebel. This means that the user contact will need to maintain multiples IDs/passwords to access OpenText ticketing systems via multiple ticketing portals. At a later date, if needed, it will be possible to merge Siebel Contact records and Accounts into one winning record so the user can access all information on one portal.

FD02: Adhere to customer security policy

Need to be able to contractually adhere to custom customer security policy changes, and not breach SOC audit rules

Solution

The existing Covisint portal login satisfies this requirement. The SOC requirements (in Covisint case, Type 2), are a set of operational controls related to several different trust principles as defined by the AICPA. Covisint is currently compliant.

Ticket Integration

FD03: Ticket integration

Ticket integration (tickets to be opened, reviewed, edited, closed, etc. through the Portal)

Some customers are used to opening tickets directly in CRT, which should not continue; feature rich online ticketing can perhaps solve this situation.

Solution 3.00 – Accessing the ticketing system

All existing links to the HP and CRT ticketing systems on various "Contact Us" pages will be updated to the new system URL. https://support.covisint.com should redirect to the new portal landing page.

Customers who are already logged into the Covisint Commercial Infrastructure will be able to click the Support logo on the header within that infrastructure to access the new Portal, and will remain authenticated and able to see and access all relevant features and functionality as determined by the customers' individual Account ID profiles.

Redirect these "Contact Us" URLs in the commercial application to the new portal home page.

Solution 3.01 – Home page

The home page is available to all users, authenticated or not. If a user tries to access something that requires authentication, e.g. viewing the *Tickets* page, he will be prompted to sign in.

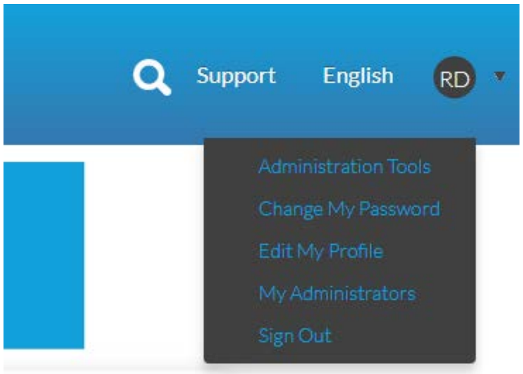
Header / Navigation
The site's header emulates the header on the existing Covisint support pages. (Search is not included here—see FD11.)

There is a "Support" logo that links to the existing Covisint Support landing page as well as a text link "Support" that links to the same page.

If the user is not already signed in, there is a "Sign In" link that goes to the Covisint log in page.

The account navigation displays the user's first name/last name initials when logged in and has a drop down list with links to

- Administrative Tools
- Change My Password
- Edit My Profile
- My Administrators
- Sign in / Sign out



There is a link in the header that displays the user's preferred language that, when clicked, shows a drop down list to change their language preference for the current session—this selection does not sync with Covisint account (see FD19).

The global navigation has links for

- **Chat**: Start a chat
- **Open Ticket**: Open a new ticket through the ticket form
- **Tickets**: View a list of tickets (*requires authentication*)
- **Contact Us:** Find telephone contact information by product line and region
- **Links:** A list of links to download manuals, quick reference guides, view videos etc.

Search
A prominent search area allows users to search through the knowledge base in supported languages (see FD11).

Sign In Message
The home page has a "sign in" alert that displays only when a user is not authenticated and has a link to the sign in page. Content editors are able to update this verbiage.

Announcements
The home page has an announcements area for alerts, issues, etc. If there are additional details beyond the title, clicking the item expands to show relevant details (see FD16).

This portlet is not visible if there are no announcements.

Quick Links
The global navigation actions are available as tiles in the content area of the home page.

Content Area
There is a content portlet at the bottom of the page where administrators can add text, links, etc.

Footer
There is a footer with copyright text and link to legal information.

Customers who are not logged into the Portal are not able to access Tickets, and will see only generic, publicly available content, links, etc. Clicking "Tickets" will prompt the user to sign in.

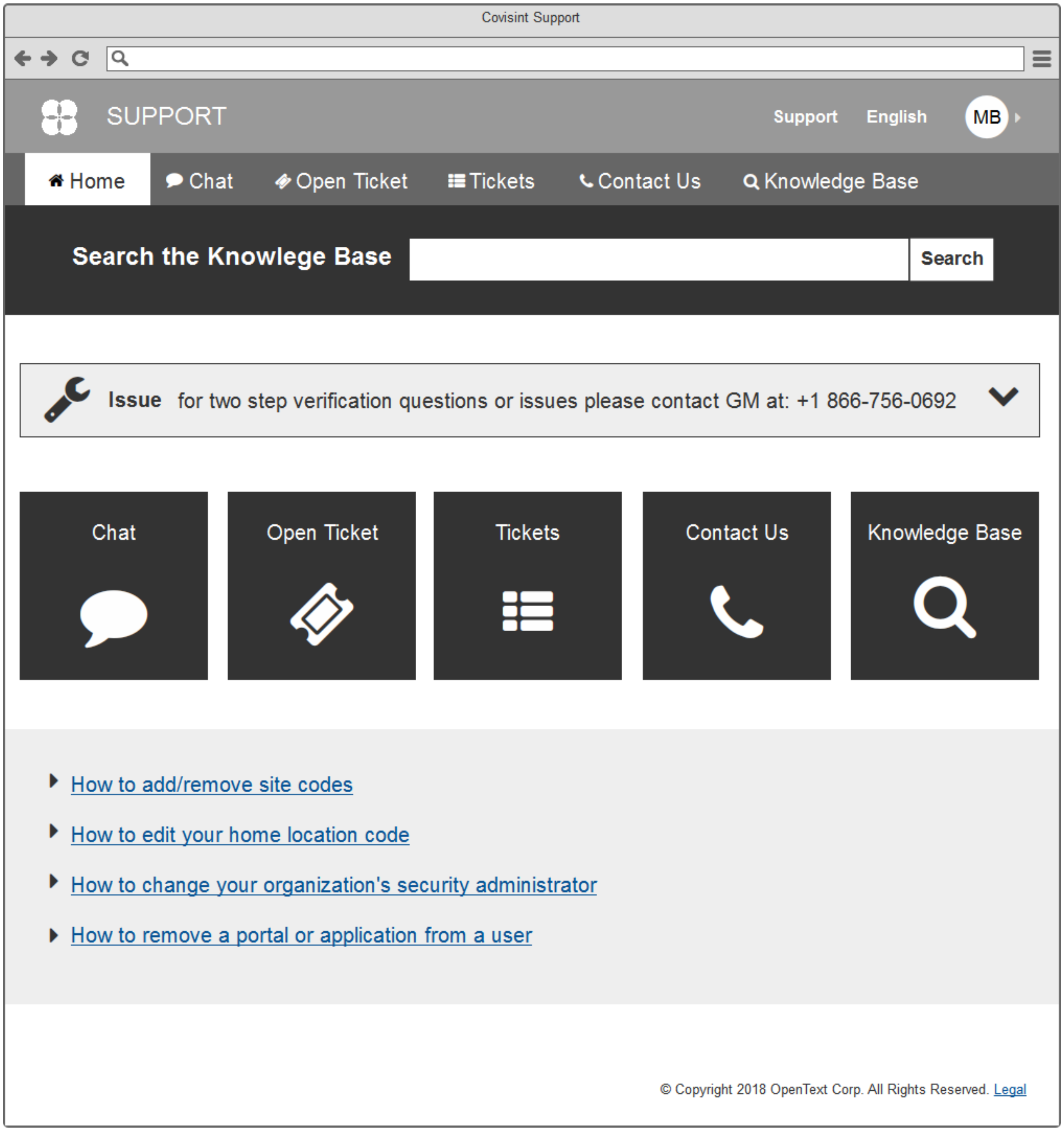


Figure 1: Home page signed in

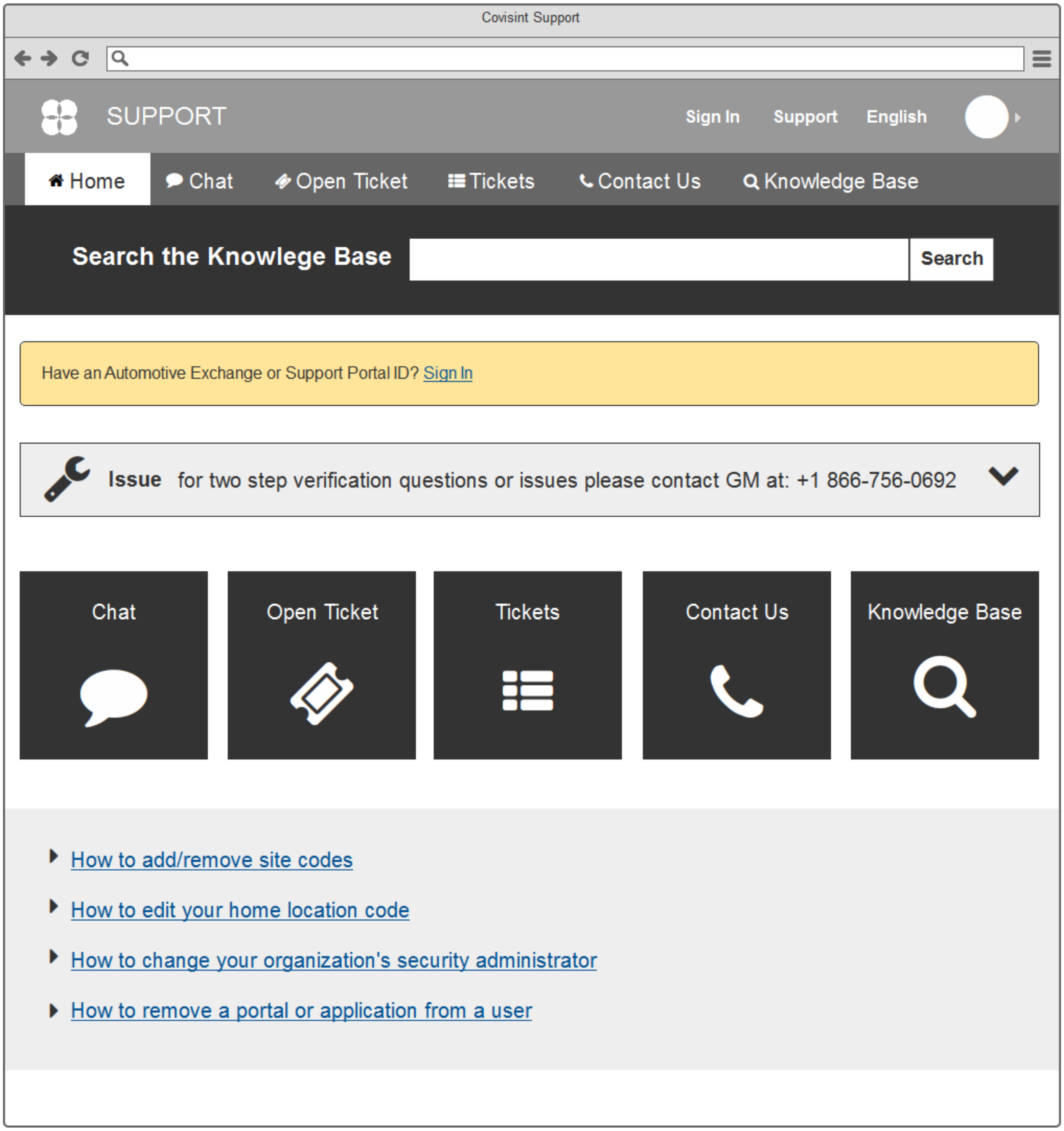


Figure 2: Home page signed out

Solution 3.02 – Open a ticket

Anyone can open a ticket—contact information requested from non-authenticated users is auto-populated for authenticated users.

Form fields for users who are **not authenticated** with a Covisint portal account:

- **Your Company Name** – text input field (required)
- **First Name** – text input field (required)
- **Last Name** – text input field (required)
- **Email address** – text input field (required)
- **Phone Number** – text input field (required)
- **Urgency** – default is “Normal”
- **Language** – select list – defaults to English unless user has selected a different language during his portal session
- **Preferred Contact Method** – select list with a default of “Email”
- **Product Line** – select list (required)
    - Business will provide this list in Siebel. Provide an “other” option.
- **Issue Type** – select list based on Product Line selection; field is disabled until Product Line selection is made (required)
    - Business will provide this list in Siebel. Provide an “other” option.
- **Subject** – text input field (required)
- **Description** – text area field (required)
- **Attachments** (see FD3.03)
- **Send a copy of the ticket by email to** – text input (optional – see FD18)
    - The user can CC someone when opening a ticket by including an email address in this field

These users must complete a **captcha** to open the new ticket.

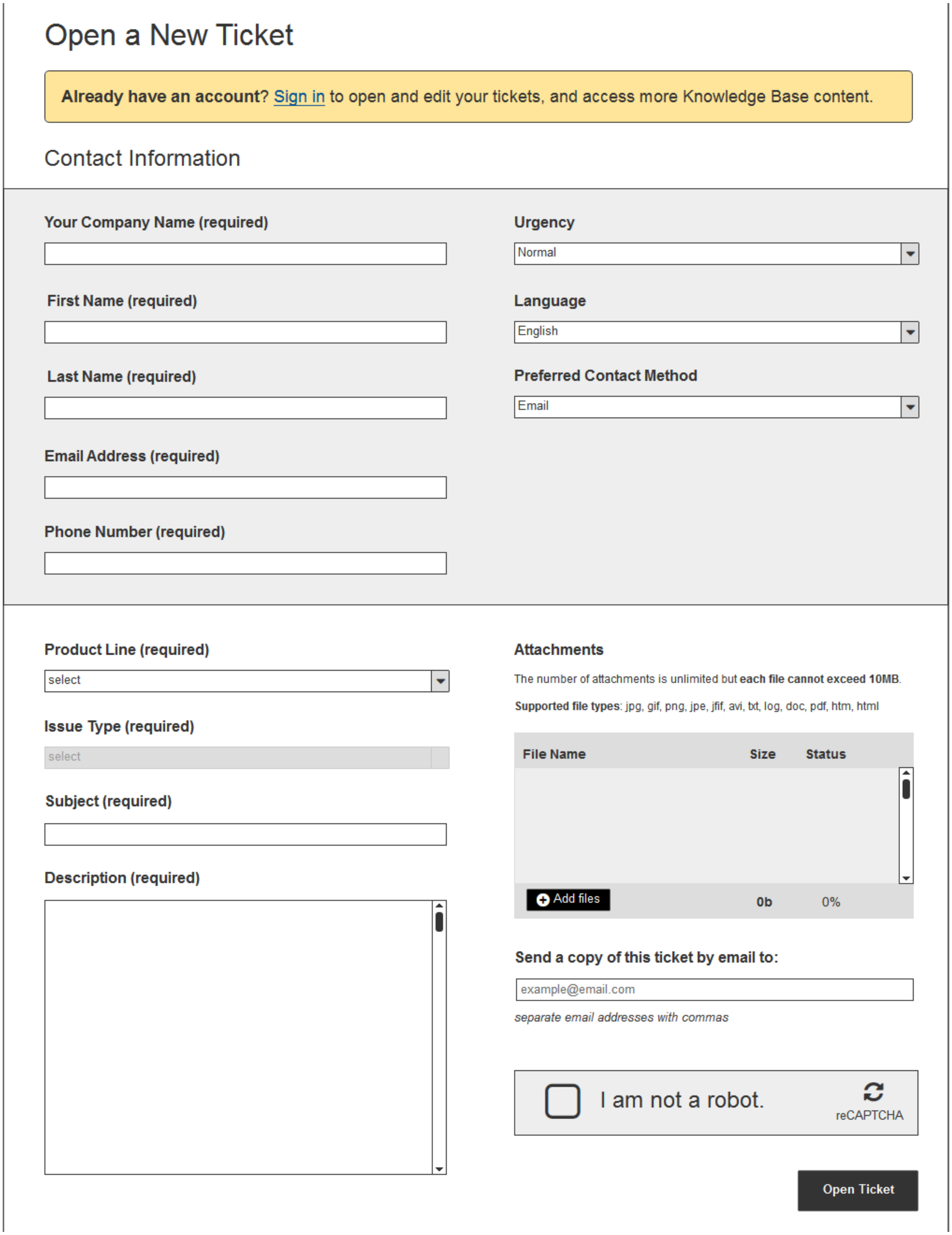


Figure 3: Open ticket form for unauthenticated users

Once the user clicks the ‘Open Ticket’ button, the system generates emails to the user and any CCed email addresses with the details of the ticket including ticket number. It **does not** include a link to the ticket.

The user sees a confirmation message after submitting the form with the ticket number for reference.

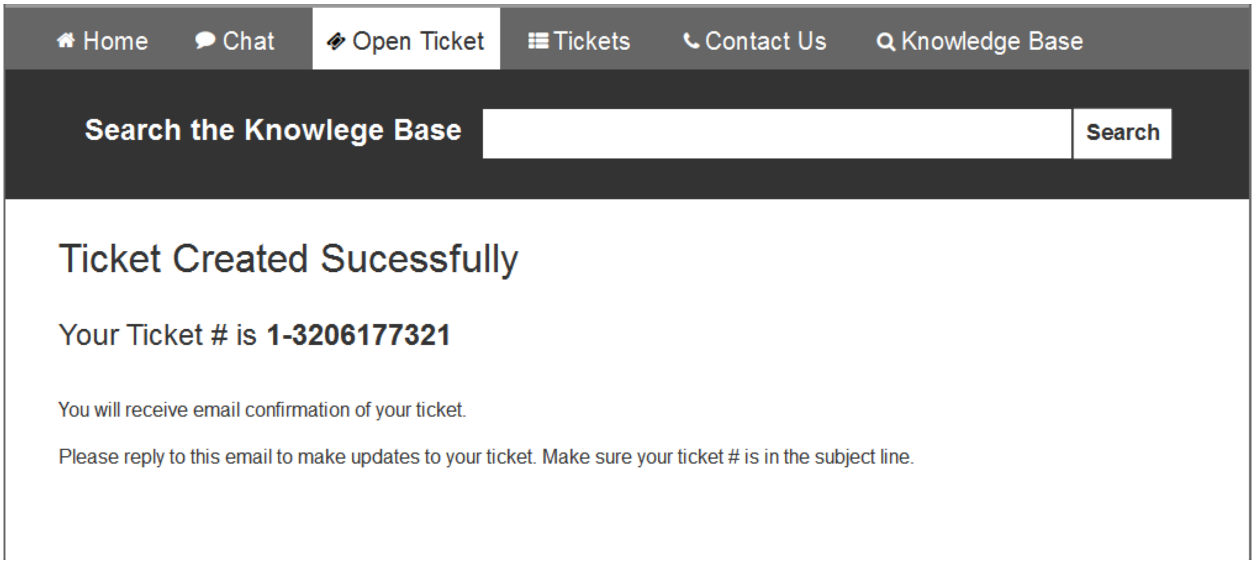


Figure 4: Ticket confirmation page for unauthenticated ticket creation

Form fields for users who **are authenticated** with a Covisint portal account:

- **Customer Account** – select list based on user permissions (required)
  - A *Not Applicable* option is auto-selected for any user not yet associated with any customer accounts
- **Product Line** – select list based on user permissions/Customer Account selection; field is disabled until user selects a Customer Account (required)
  - E.g., automotive, healthcare, etc.
  - Business will provide this list in Siebel.
- **Issue Type** – select list based on Product Line selection; field is disabled until Product Line selection is made (required)
  - Business will provide this list in Siebel. Provide an “other” option.
- **Subject** – text input field (required)
- **Description** – text area field (required)
- **Urgency** – default is “Normal”
- **Language** – select list pre-populated from the user’s account preferred language but can be updated on a per ticket basis
- **Phone Number** – pre-populated from user’s account and can be changed for a specific ticket only
- **Email Address** – pre-populated from user’s account and can be changed for a specific ticket only
- **Preferred Contact Method** – select list with a default of “Email”
- **Attachments** (see FD3.03)
- **Send a copy of the ticket by email to** – text input (optional – see FD18)

- The user can CC someone when opening a ticket by including an email address in this field; multiple emails are comma-separated. This data is not saved to the system; it is used for generating a one-time notification email only.

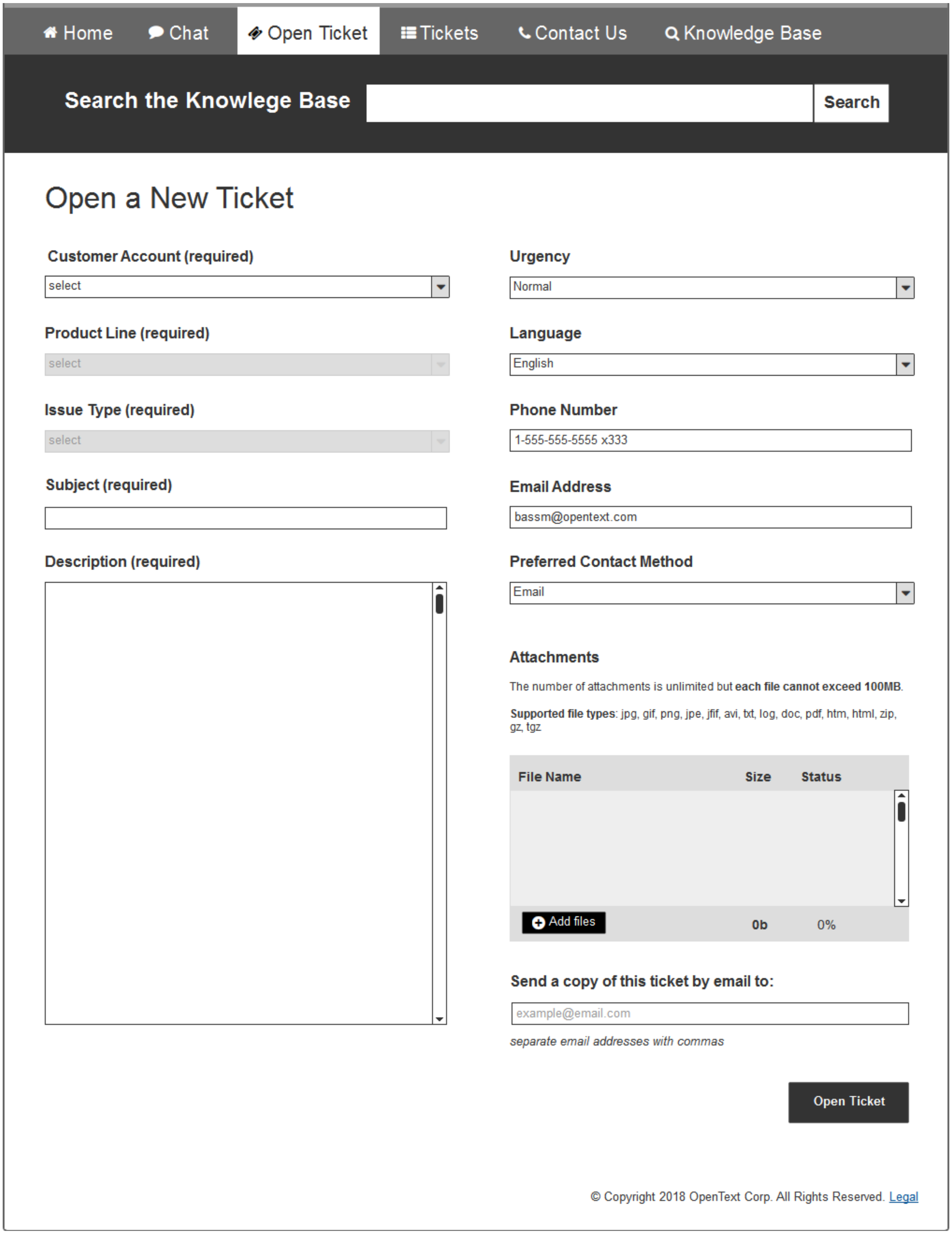


Figure 5: Open ticket form for an authenticated user

The system generates emails to the user and any CCed email addresses upon ticket creation with the details of the ticket and a **link to view the ticket** in the portal.

After opening a ticket, the user sees the *View Ticket* page for that ticket (see FD3.03).

System Messages

All required fields are marked with (required) after the field label. If a user tries to submit the form without entering data or making a selection for a required field, the message "This field is required." displays underneath the field. The system will also check that a valid email address is entered. If the format is incorrect, the message "Please enter a valid email address." displays underneath this field.

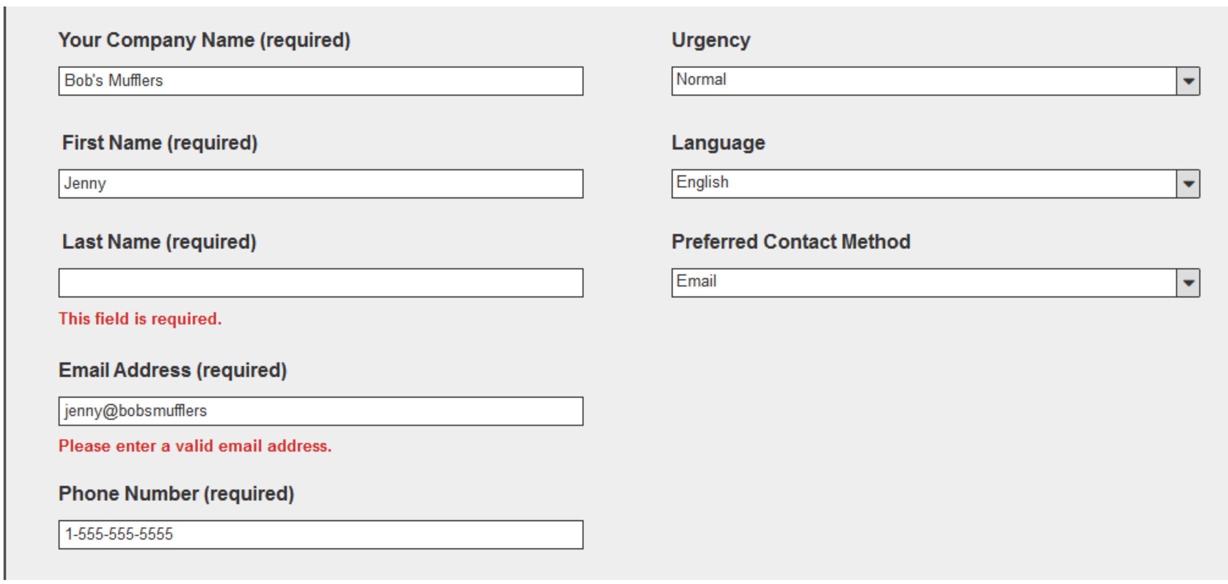


Figure 6: Required fields messages

Solution 3.03 – View Ticket

Each ticket has a unique page view where an authenticated user sees the details of the ticket with the following fields:

- Ticket #
- Subject
- Product Line
- Requested By (FirstName LastName)
- Status – these values come from Siebel
  - Open
  - Closed
  - Re-Opened
  - Cancelled
- Sub-Status (displayed after the Status value) – these values come from Siebel
- Open Time (date / time stamp)
- Updated (date / time stamp)
- Description

- List of “Updates” – attachments, comments and emails associated with the ticket

None of the fields can be edited. New attachments and comments can be added with the “Add New Update” button and tickets can be closed with the “Close Ticket” button (see FD3.04).The “Description” and “Updates” sections can be expanded and collapsed. By default, “Description” is collapsed and “Updates” is expanded.

All ticket updates are listed in the “Updates” grid which has which has columns for

- **Subject** (email subject or comment subject)
  - Body – plain text (hidden by default)
- **Created** (date / time stamp)
- **Added By** (FirstName LastName)
- **Attachments** (links to each allowed attachment type with file size, separated by semi-colon)

The default view is 10 updates, collapsed. Users can choose to “view all” updates, page through 10 at a time or go to a specific page, e.g. page 3 shows updates 21-30.

The grid shows the total number of updates. Example: “Displaying updates 4 of 4”. If there are no updates, this text reads “No updates to display”.

The list of updates is sorted from newest to oldest by default. Users may change sort order on the “Created”, “Subject”, and “Added By” columns.

Users can see body area of an update by clicking the ‘plus’ icon next to each.

The newest update is expanded to show the body area when the page loads.

Users can see body areas of all updates by clicking the “Expand All” button. Once expanded, this button changes to “Collapse All”.

The list of attachments has links to files of file type allowed to be uploaded by the user (see FD20). Any other file type attachments display the file name and size only, e.g. .exe.

Any attachments added during ticket creation display as an update with subject “Initial ticket attachments” with the ticket created date/time stamp, user’s name and links to the attachments.

CSRs may enter private updates from within Siebel which must not display for the end user (see FD21).

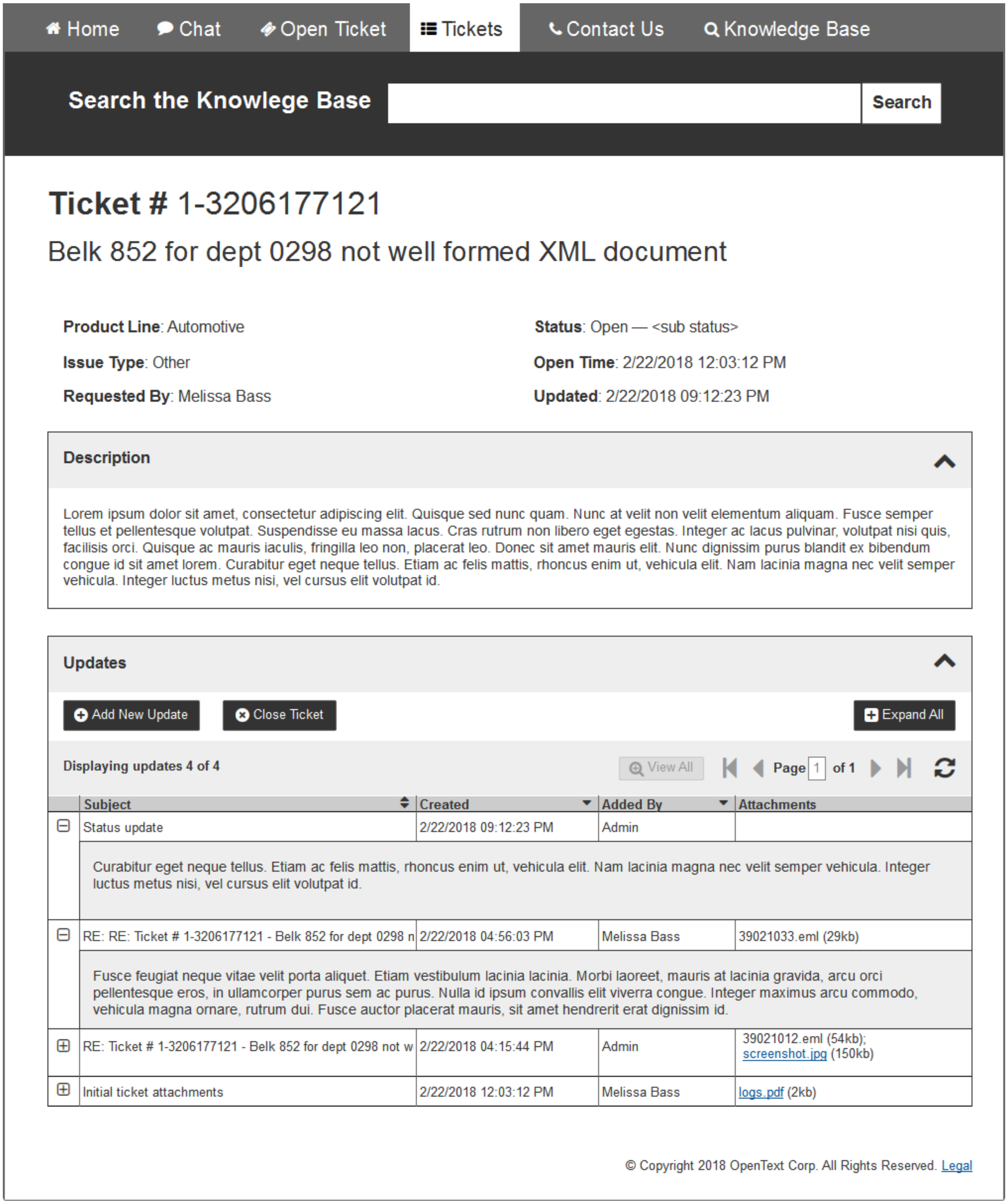


Figure 7: View open ticket screen

Once a ticket is closed, a prominent “Resolution” area displays above the “Description” area. There is a “resolution” required field in Siebel.

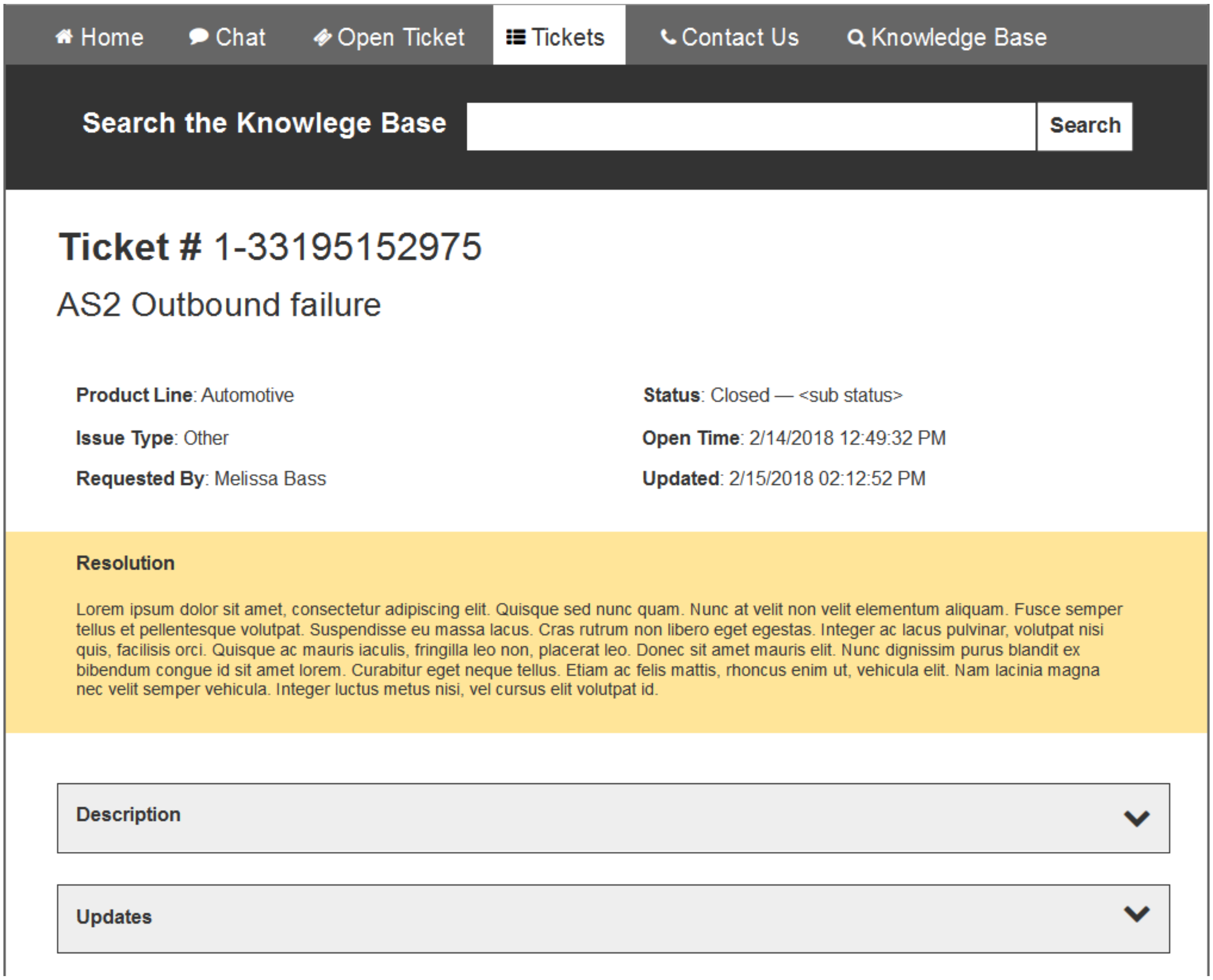


Figure 8: Closed ticket screen with resolution

Solution 3.04 – Ticket Updates

Authenticated users only may add attachments and comments to tickets from the *View Ticket* page by clicking the “Add New Update” button. This action opens a modal window with three fields:

- Subject (required)
- Notes
- Attachments

All updates are listed in a grid below the ticket description (see FD3.03).

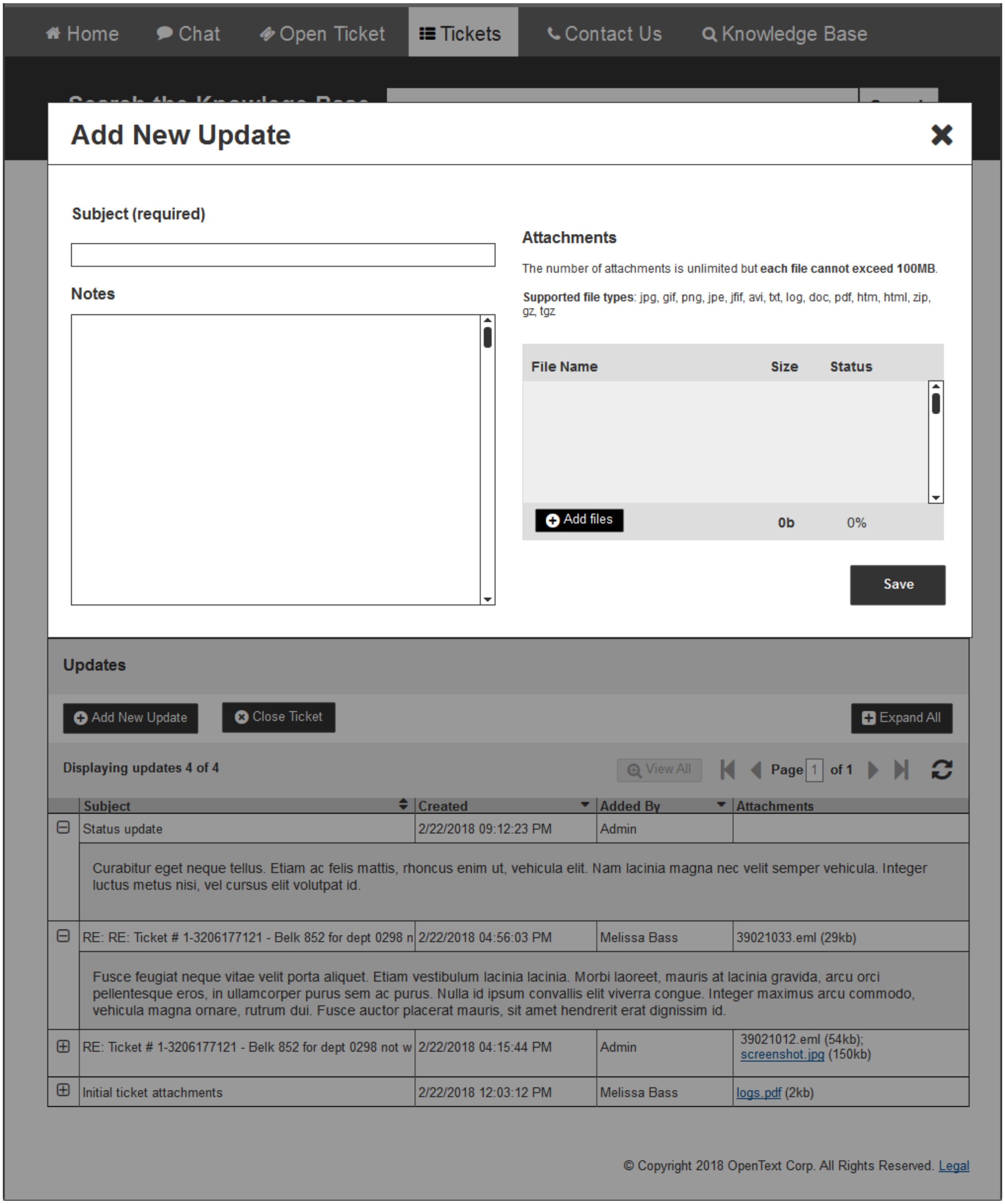


Figure 9: Add new update modal window

There is also a “Close Ticket” button for the user to close his own ticket. Clicking this button opens a modal window with one field

- Resolution (required)

Once the user clicks the “Save” button on the form, the ticket status updates to ‘Closed’ and the resolution is displayed per FD3.03.

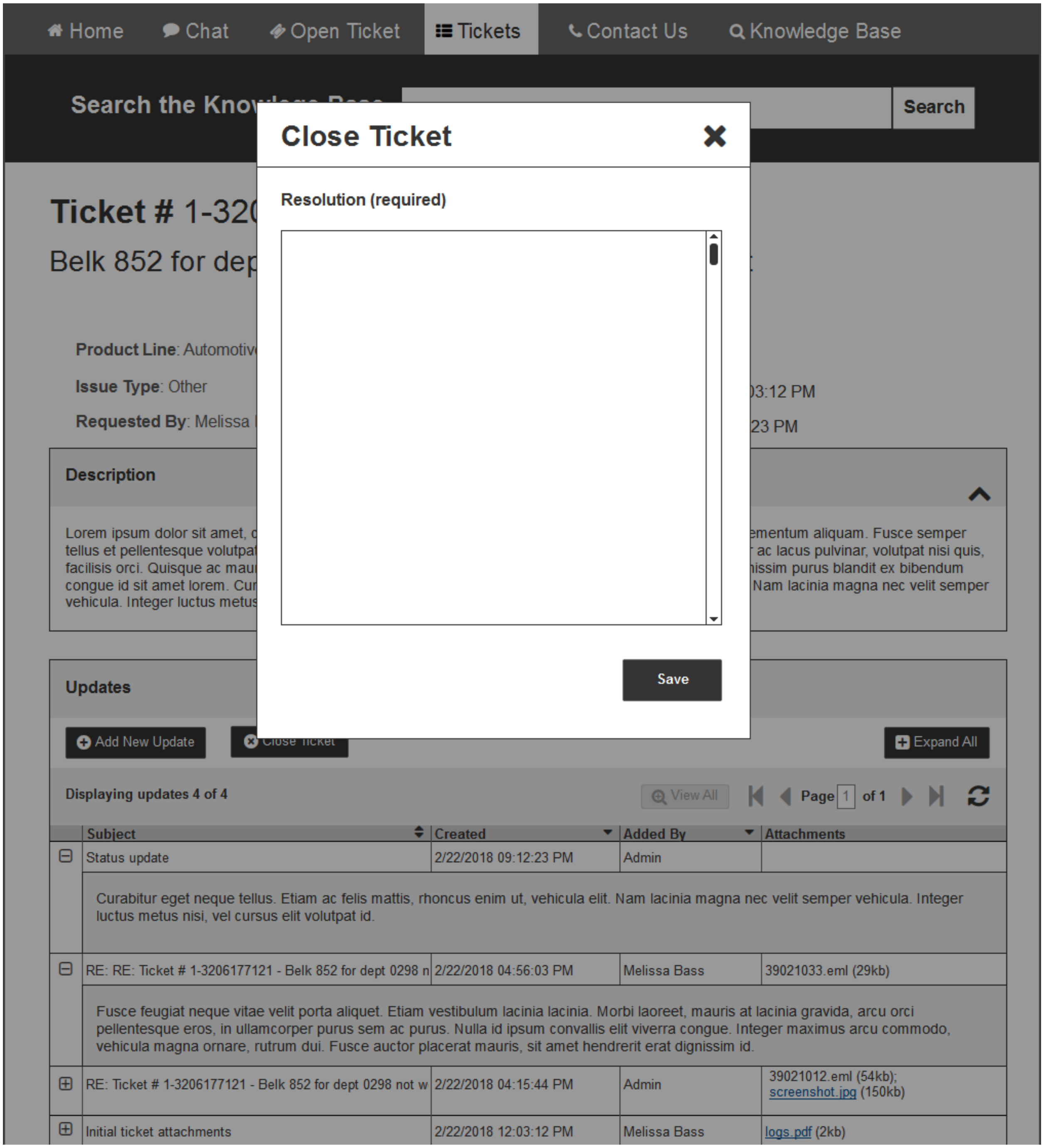


Figure 10: Close ticket modal window

Solution 3.05 – Tickets list

If a user tries to access this page and is not authenticated, he will be prompted to sign in.

Authenticated users see a list of all tickets they have ever opened and can navigate to a ticket by clicking the ticket number.

The Tickets grid has the following columns:

- Ticket # (linked)
- Subject
- Product Line
- Opened By
- Status — <sub status>
- Open Time

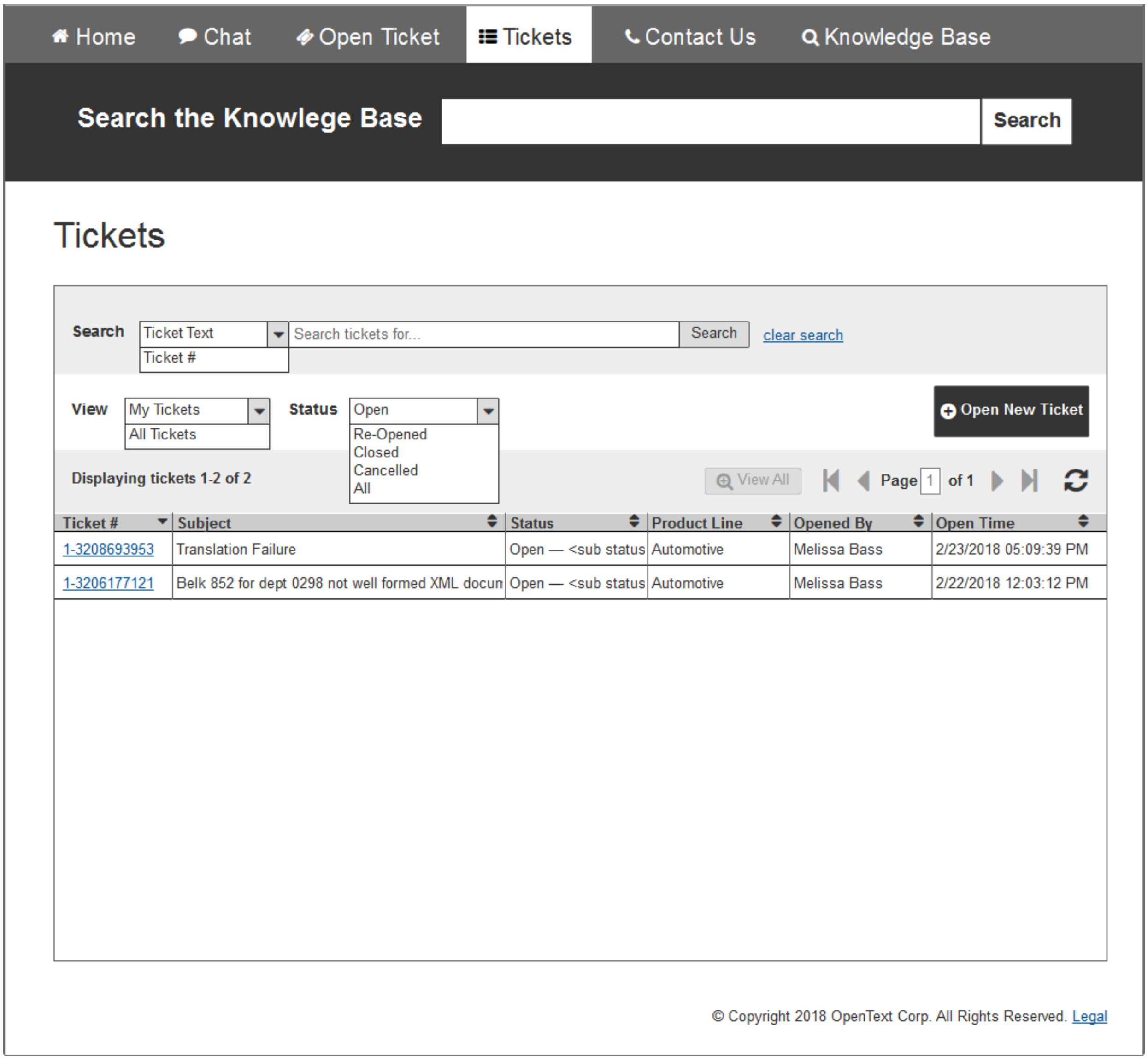


Figure 11: My Tickets default view

The default view is 50 tickets. Users can choose to "view all" tickets, page through 50 at a time or go to a specific page, e.g. page 3 shows tickets 101-150.

The grid shows the total number of tickets. Example: “Displaying tickets 2 of 2”. If there are no tickets, this text reads “No tickets to display”.

Users can switch between viewing all tickets, only open or only closed tickets.

Users can switch between viewing

- only tickets they have opened
- all tickets for all accounts they are associated with (Admin Only)

Further clarification:

- Users can choose to see tickets they have opened.
- If a User has Admin privileges for 1 or more organization, the User can switch between viewing only tickets he has opened, or all tickets for all accounts with which he is associated.
- If a User does not have Admin privileges for 1 or more organization, but has a business need to be able to view more than just his own tickets, Admin privileges to allow the User to see all tickets for all accounts with which he is associated can be selected in Siebel.

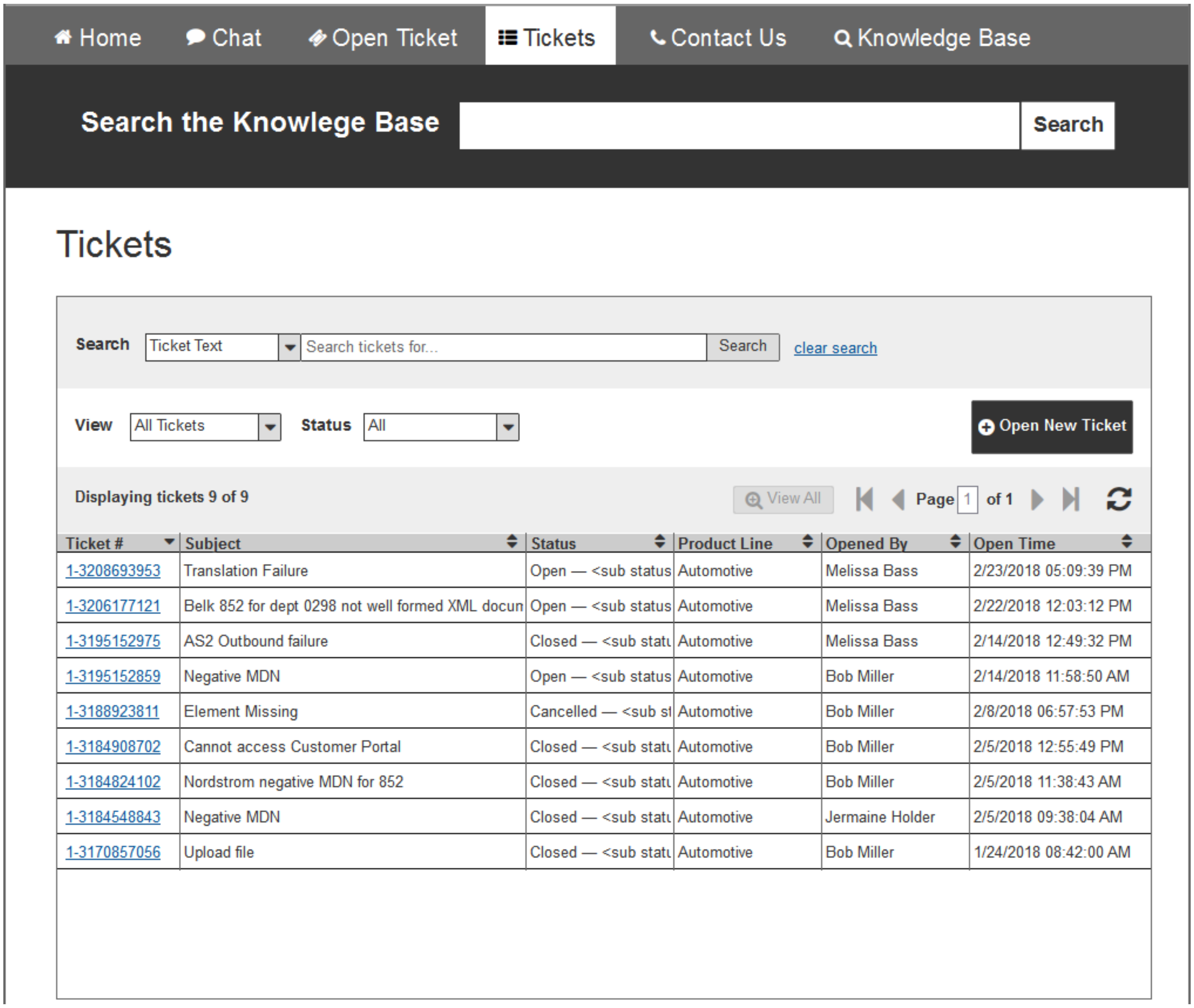


Figure 12: Tickets filtered to view all

The tickets grid includes a button to “Open New Ticket”.

Solution 3.06 – Ticket URL

Each ticket has a unique URL that can be accessed from search, email, copy/paste.

Solution 3.07 – Ticket Search

Authenticated users can search ticket information on the *Tickets* page using keywords or a ticket number. The user selects the search type, text or ticket #, using a dropdown menu next to the search bar.

A ticket number query opens the result in the *View Ticket* screen for that ticket (see FD3.03).

A keyword query searches the contents of a ticket's subject and description fields, and updates the list of tickets in the tickets grid. Results are displayed by ticket ID descending.

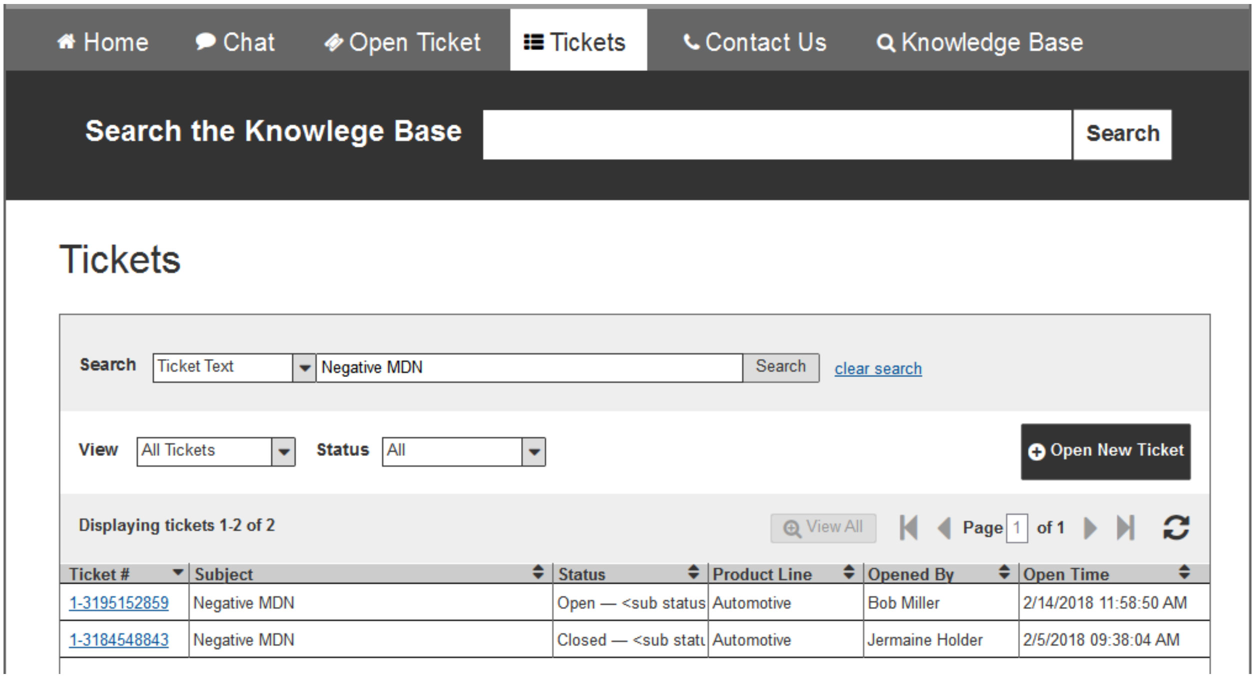


Figure 13: Tickets text search results

Users click the 'clear search' link next to the search box to remove a text query and return to viewing tickets based on the selections for the "View" and "Status" select boxes only.

If there are no tickets that match the search query, the tickets grid shows "No tickets to display" and no records in the grid.

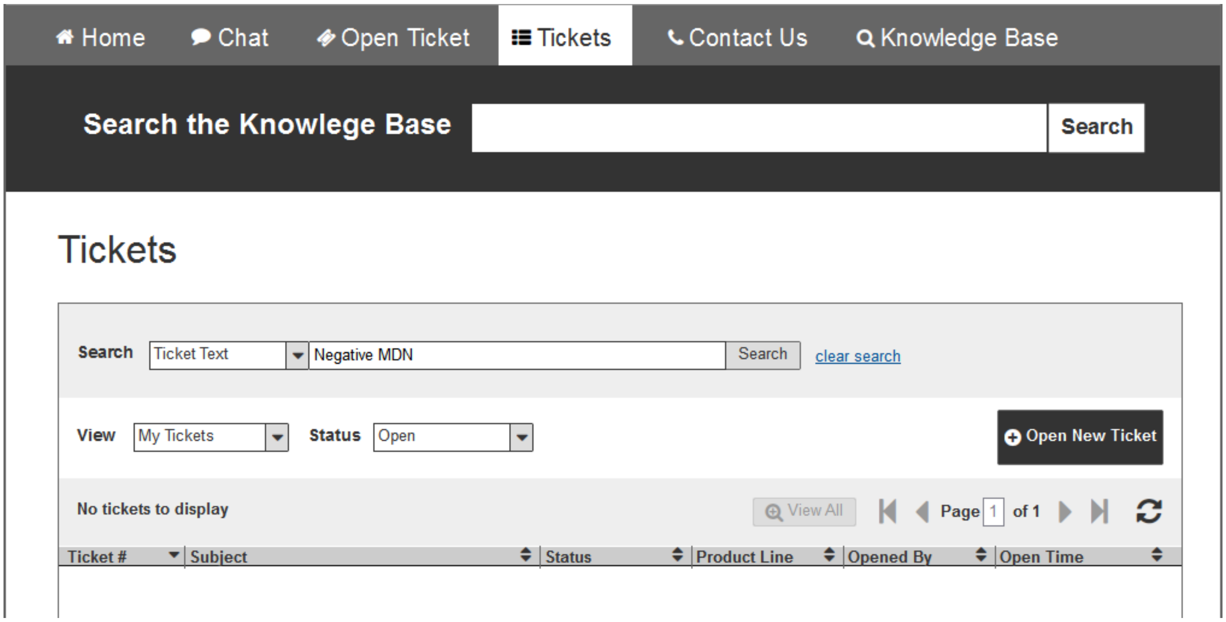


Figure 14: No tickets returned in search

If a ticket number is not found, or the user is not associated with the account to view a specific ticket, he will see an error alert box above the tickets grid.

<ticket#> *is not a valid ticket #. Please try again.*

You do not have permission to access ticket # ***<ticket#>****.*

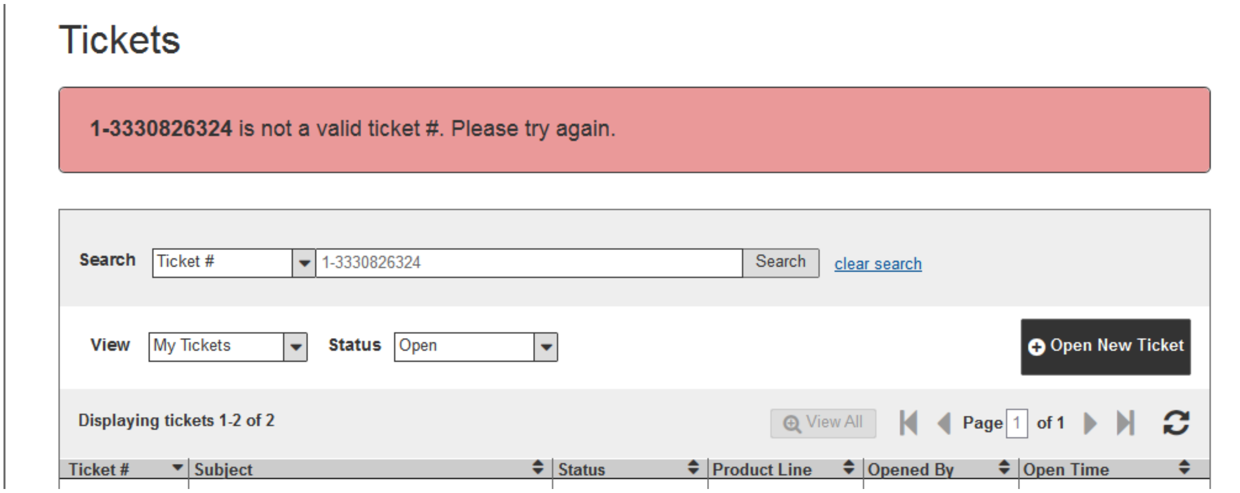


Figure 15: Ticket number not found error message

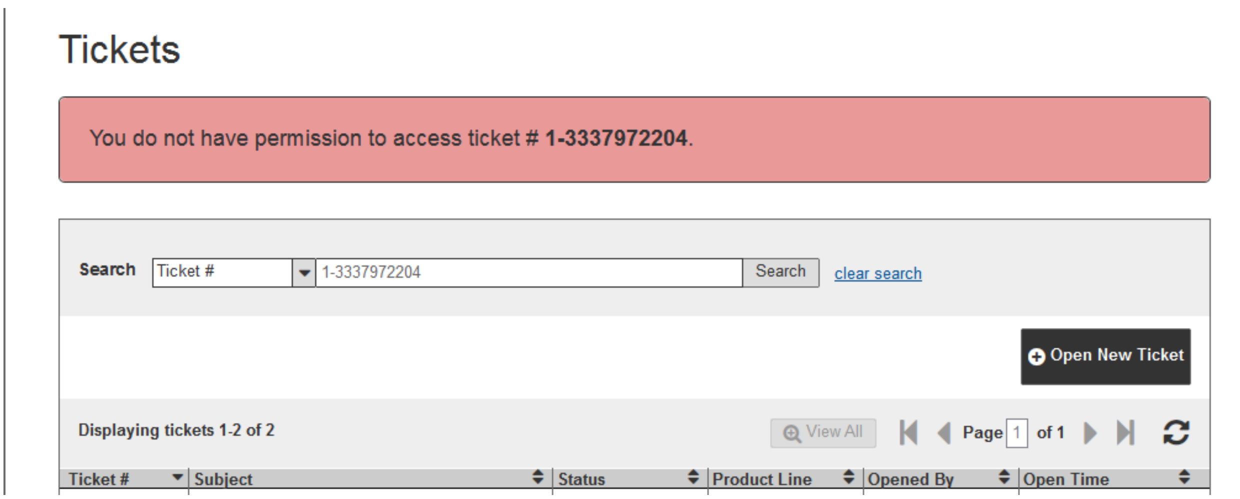


Figure 16: No permission to view ticket

Solution 3.08 – Update profile information

The user must update his profile data, e.g. email address, phone number, language preference, in his Covisint profile and that data will be synced into the ticketing system. These links, which go to existing Covisint account pages, are available from the account dropdown in the header.

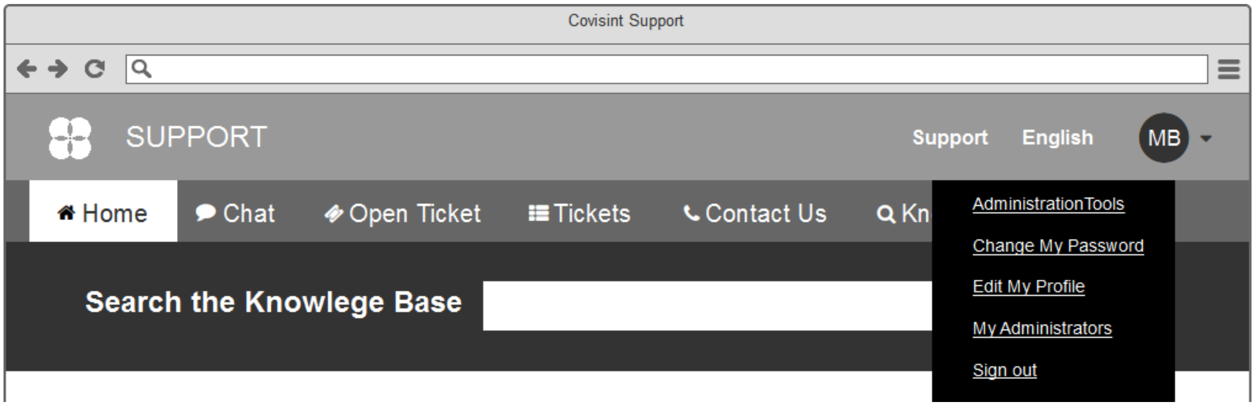


Figure 17: Account Tools drop down

Solution 3.09 – Knowledge Base page

The *Knowledge* page contains a content portlet where administrators can add links to relevant content like manuals and quick reference guide. These are usually file downloads. Files are kept in Liferay.

By default, the page displays content based on a user's roles and attributes.

Users may also select from different Product Lines to update the contents of the page.

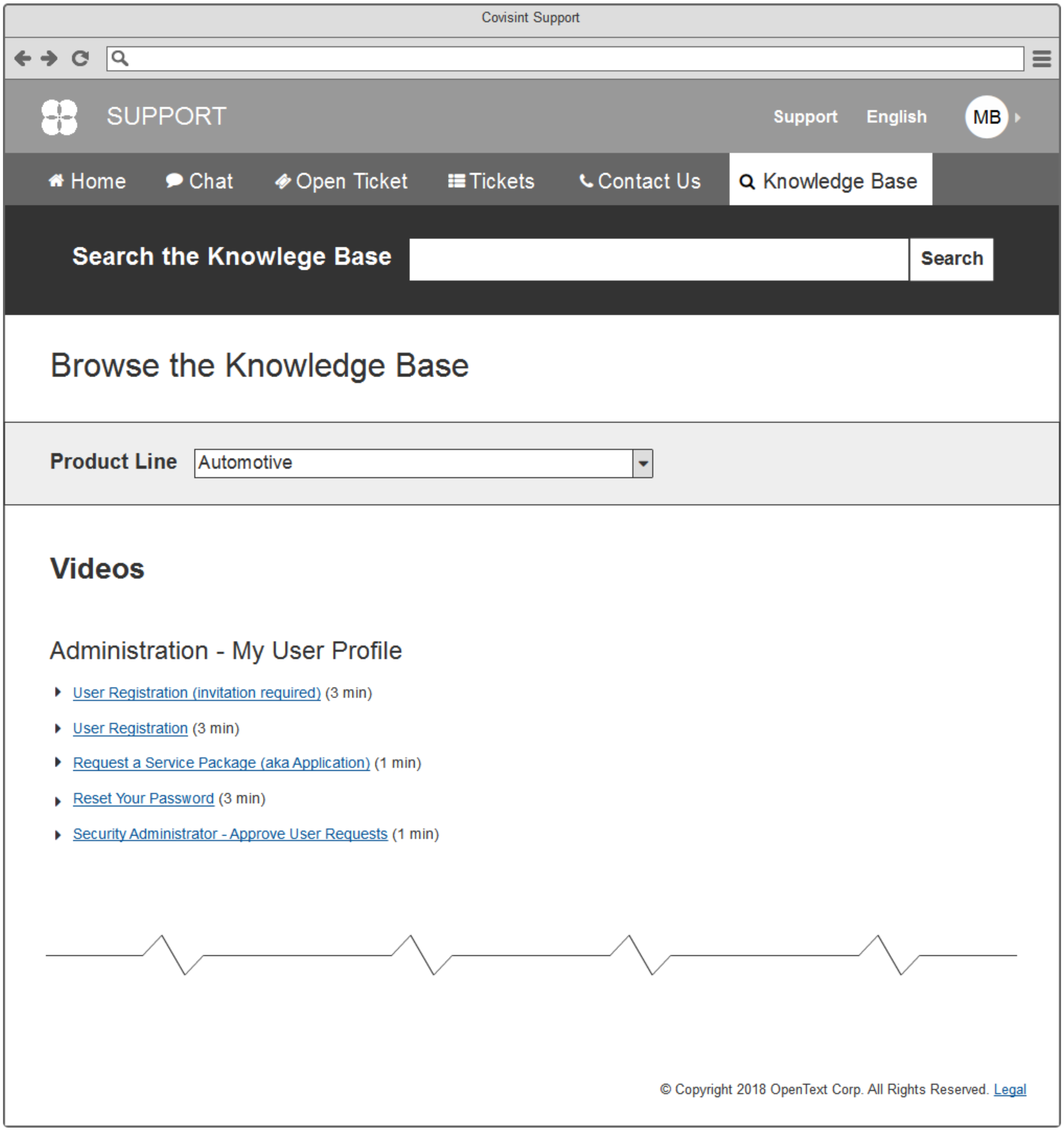


Figure 18: Links Knowledge Base page with product line Automotive selected

FD04: Auto-populate account information

Account setup needs to be configured so that information populates appropriately when tickets are opened:

- *Customers*
- *Suppliers*

- *Partners*
- *End Users*

- Account IDs are assigned to individuals
- Individuals may belong to a supplier, partner, Customer, etc.
- Individuals, using the single Account ID, can be associated with more than 1 supplier, partner, Customer, etc. at the same time

Solution

A Siebel Contact Record will store the unique Covisint Connect User Account ID (example `<EMPLOYEEID>DELPHIADMIN01</EMPLOYEEID>`). When a user accesses the Create Ticket screen, a call will be made to Siebel to locate the CCA User Account ID in Siebel, and Siebel will return the Contact's pertinent information as well as the Accounts that the Contact has been approved to create tickets against. This information will automatically populate the Contact's info, such as first/last name, "Customer Account" pick field on the Covisint Portal Create Ticket "Account" field, the "Product Line" data eligible for all products, and the "Issue Types" that are available based on those products.

FD05: Support incomplete and unknown users

Ability to receive tickets from incomplete users not yet associated with a portal/account. We use this to track tickets from potential users who have not yet registered for Covisint services.

Solution

If a Covisint Portal user is not known to Siebel after the call mentioned in FD04, Siebel will return that the user is not known. However, the user will still be allowed to open a ticket on the Covisint Portal, and the user capture information will be transferred to Siebel. On the Siebel side, the created Service Request (ticket) will not be associated to an Account, but Siebel will create a contact record in the database and will store the appropriate captured information (First Name, Last Name, Email Address, Phone #, etc.). The SR Source will be Covisint Portal, so that these tickets can be easily distinguished from other tickets in the system.

FD06: Ticketing language support

Ability to open tickets in multiple languages

Currently supported languages

- English
- German
- Spanish
- French
- Italian
- Portuguese
- Chinese
- Japanese
- Korean

Solution

All form fields, buttons, help text, system messages, navigation, etc. are displayed in the language the user has selected in his preferences. The default is English. The user may select a different language when opening a new ticket (see FD19).

Chat

FD07: Chat

Ability to access Chat available in English, German, Portuguese, Spanish Chinese

Solution

Users can chat without being registered for an account or authenticated with the site.

Chat functionality is provided through BoldChat.

Chat will be supported in these languages:

- English
- German
- Spanish
- Portuguese
- Chinese

To support system text in Chinese (Mandarin/Simplified) the business will have to provide the relevant translations.

While the support portal is also available in Japanese, Korean, French and Italian, chat will not support these languages. If a user's preferred language is set to Japanese, Korean, French or Italian, he will see the pre-chat form in English with a translated message:

Chat is not supported in <language>. Continue to chat in English, or you may choose to change your preferred language to German, Spanish, Portuguese or Chinese.

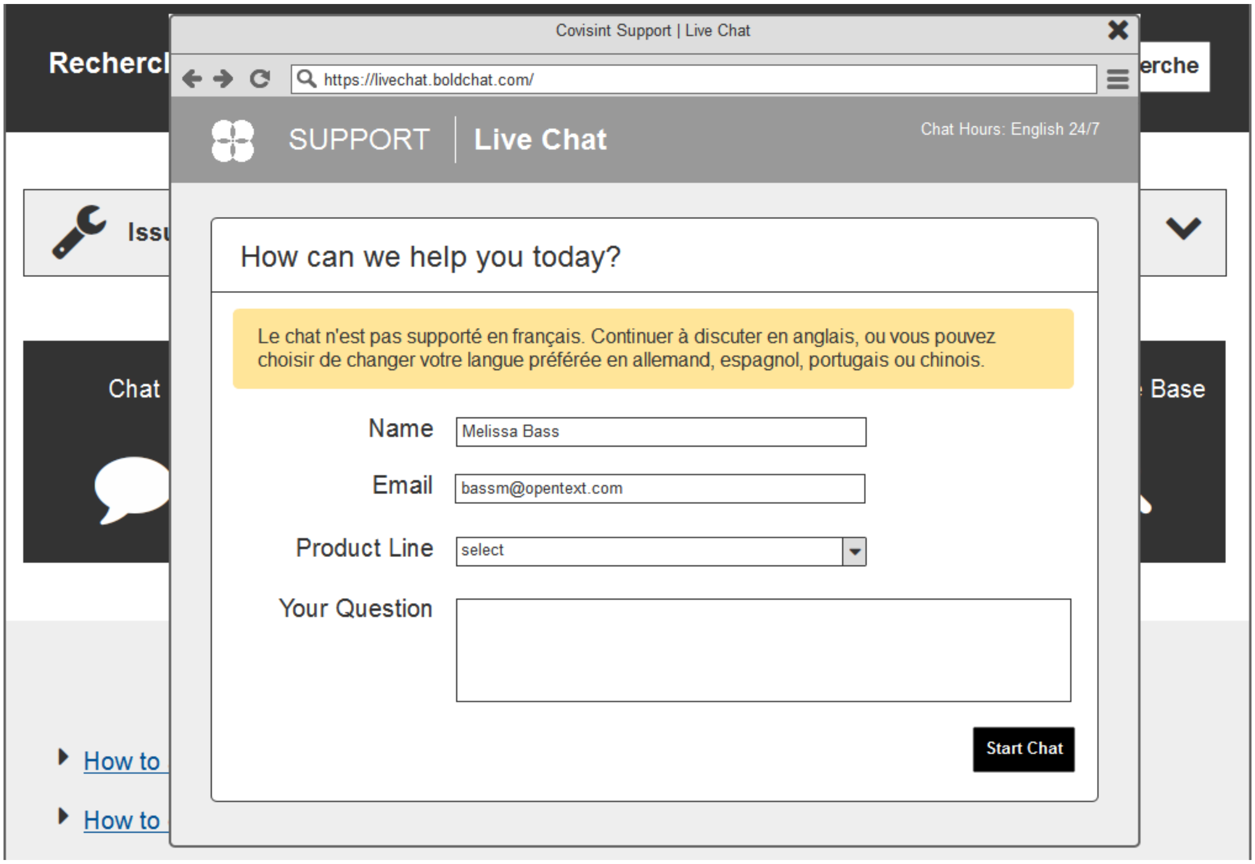


Figure 19: Chat not supported in current language

Each language has its own hours of support operation, with English only being available 24/7. Business requests that non-English users have the option to use English chat after hours. The pre-chat window will show the translated message:

Chat is available in <language> during business hours only. Continue to chat in English.

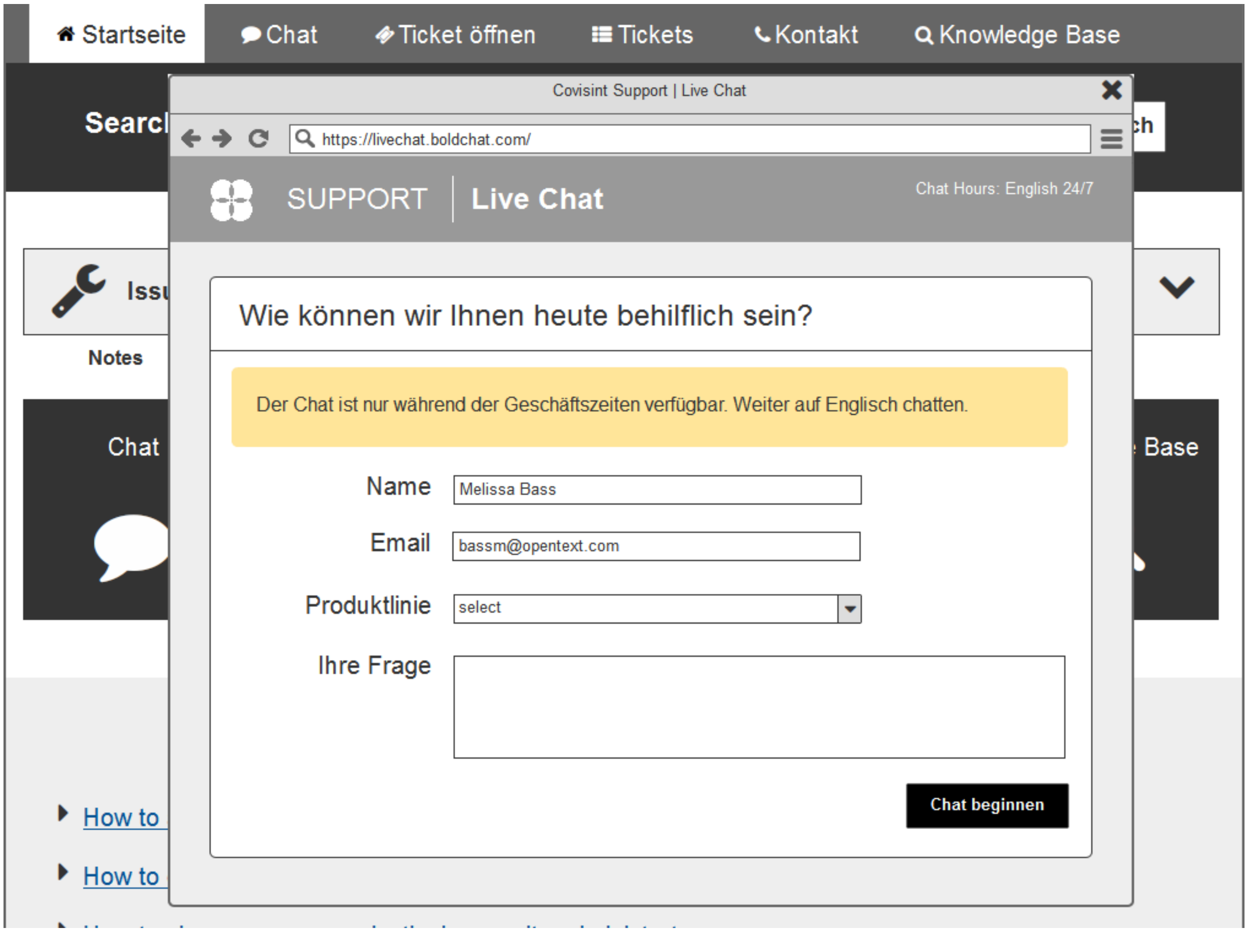


Figure 20: Translated language message for afterhours chat

As described in FD19, a user can also change the preferred language for the support portal by clicking the Language icon in the banner and selecting a different option, which will not change the user's Covisint Account Profile.

After clicking the Chat link in the global navigation or on the home page, a new window opens a pre-chat form with these fields:

- **Name** – text input (required) – pre-populated for authenticated users, concatenate first and last
- **Email** – text input (required) – pre-populated for authenticated users
- **Product Line** – select list (required) – choices provided by the business and used for queueing
- **Your Question** – text area (required)

This form and all subsequent chat screens are presented in the user's preferred language.

The user clicks the 'Start Chat' button to initiate contact with a chat agent.

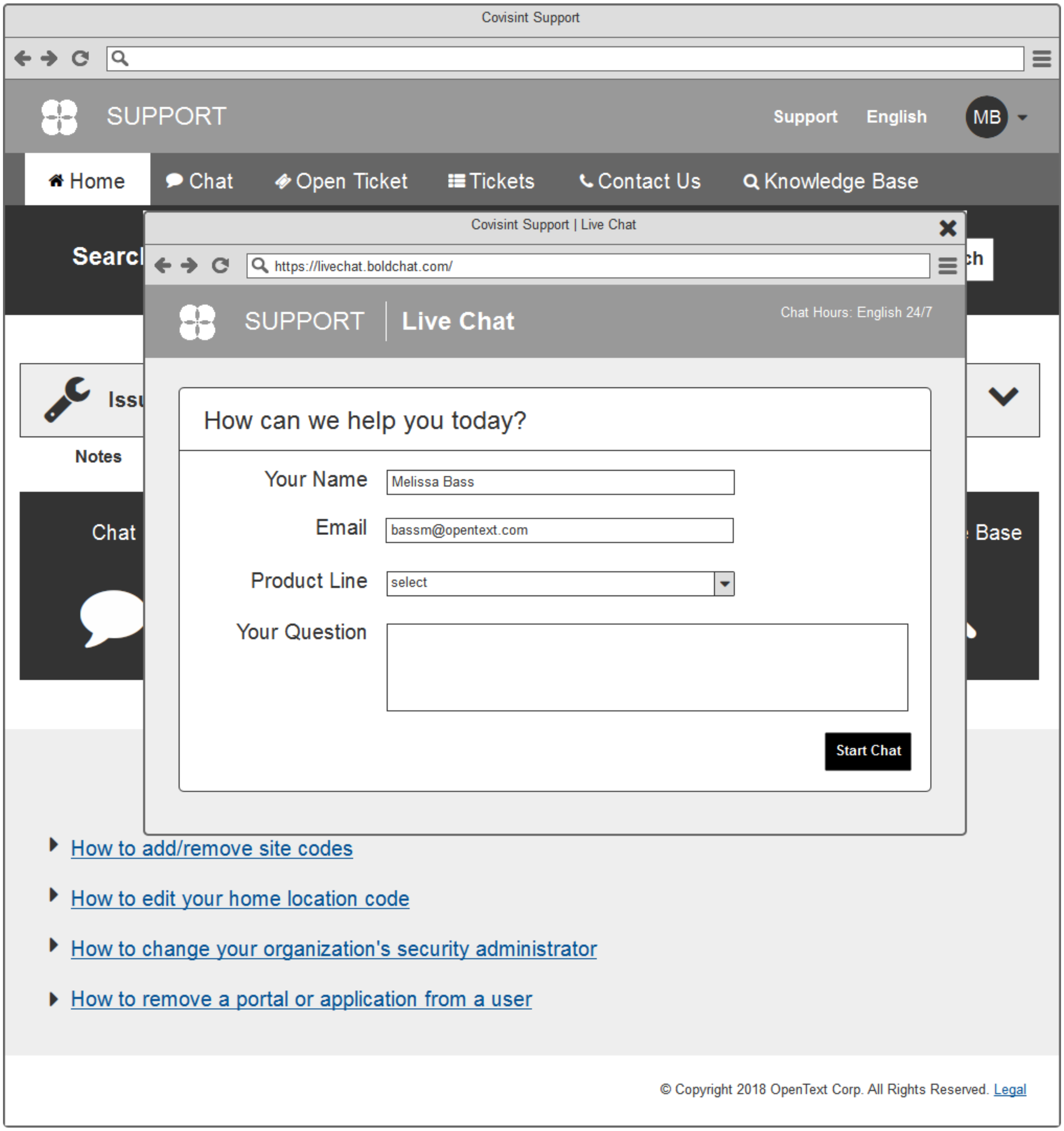


Figure 21: Pre-chat form

The chat window displays a list of responses from the user and the agent with the latest chat message displaying at the bottom. The user can enter new chats in a text area at the bottom of the screen.

There are buttons to email a transcript of the chat and to print a transcript of the chat.

The user clicks the 'End' button to stop the chat interaction.

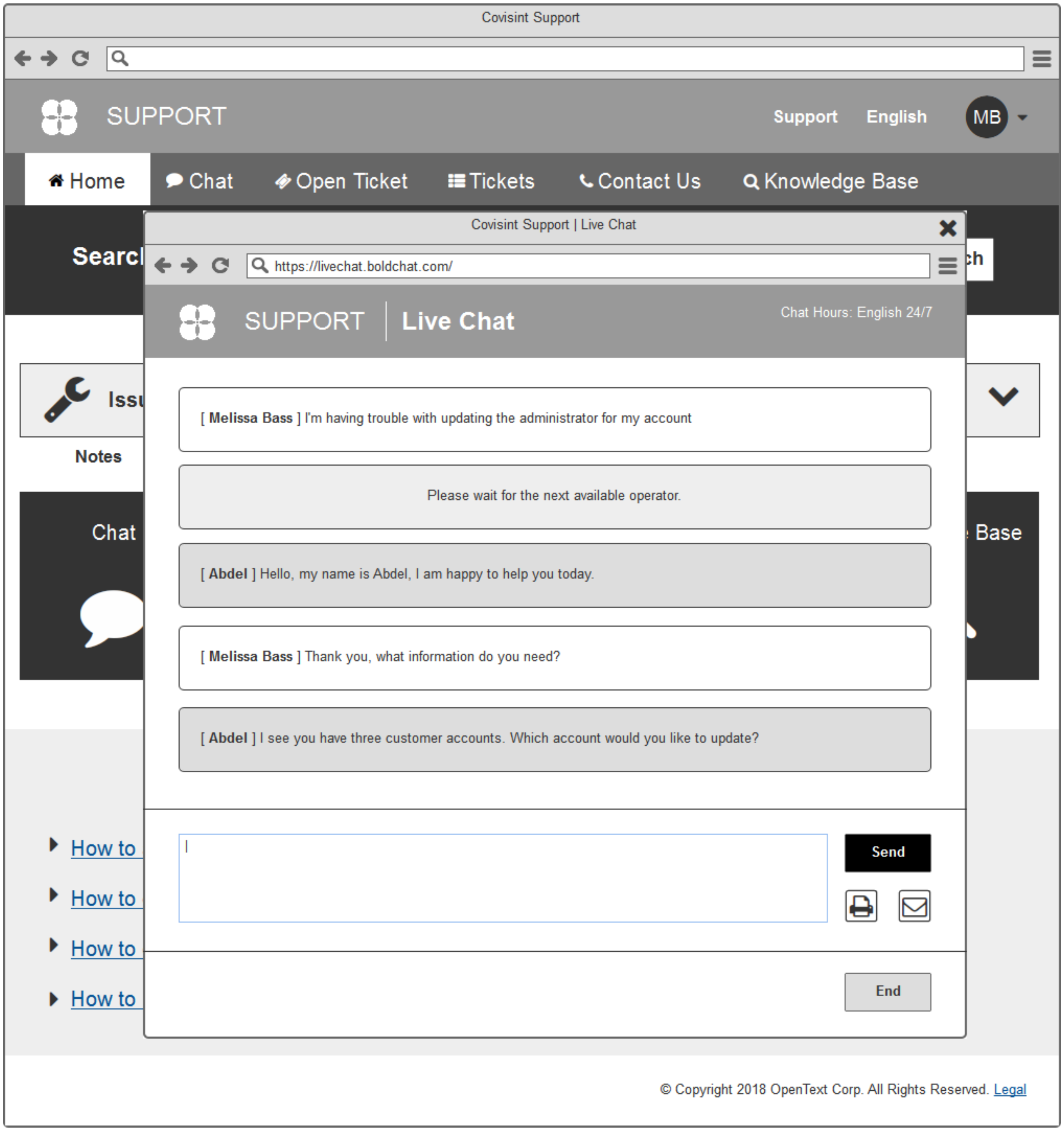


Figure 22: Chat dialog

After the user ends the chat session, he is presented with a post-chat form with an email field pre-populated with his email address where a copy of the chat transcript is sent.

Clicking the ‘Send’ button closes the chat window and returns the user to the support portal.

Each chat session leads to the manual creation of a ticket in Siebel.

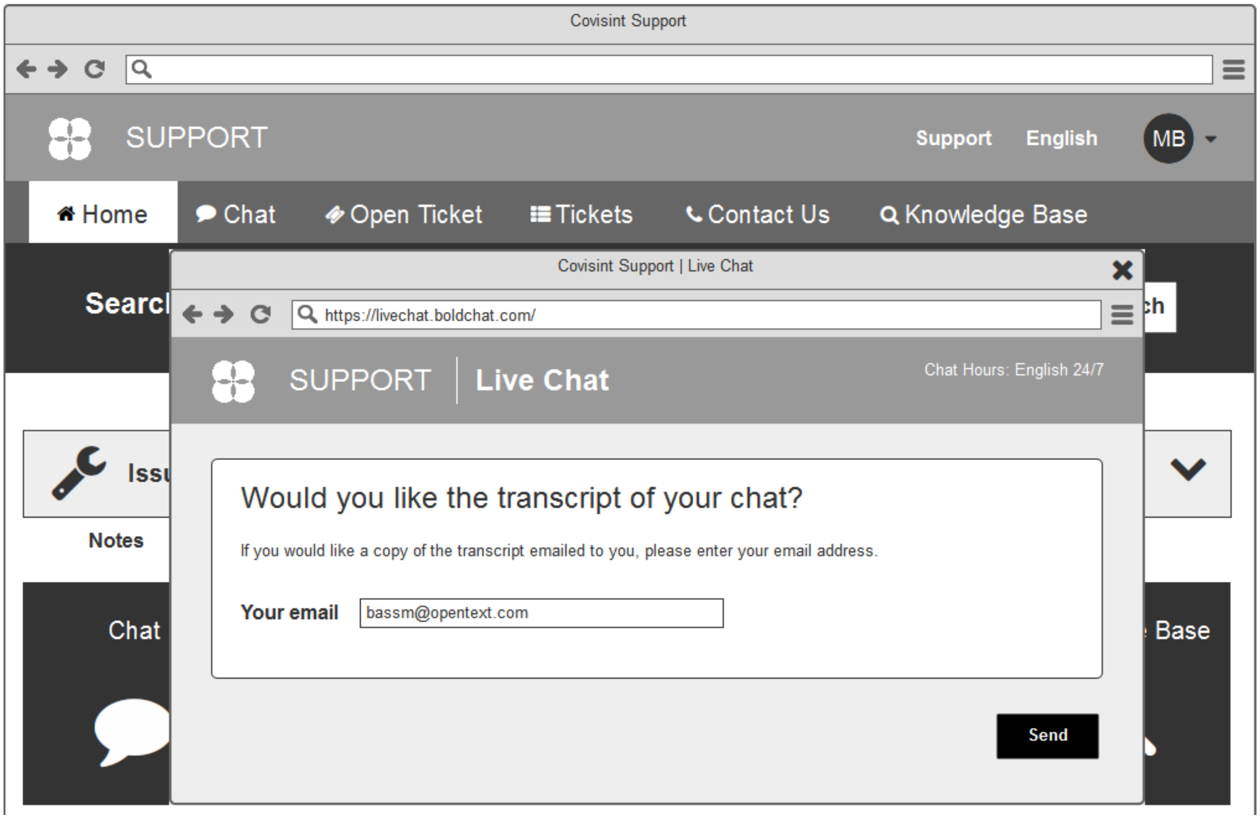


Figure 23: Post-chat form

Queuing

How chats are routed to a Department depends on both Product Line selected in pre-chat form, the language passed to BoldChat based on the user's language selected in the support portal and time of day.

Karen Weir and Brad Ernst and team will do initial setup in BoldChat for and will run its own implementation plan according to its own standard procedures.

The routing is defined in the document [Products and Chat Routing.xlsx]

Knowledge Base

FD08: Automotive Portal knowledge base access

Ability to access Knowledge Base, with or without authentication (English, German, Portuguese and Spanish) for targeted Automotive Portal articles and audiences.

Some may need to contact Support before they are registered or would normally have access to Support systems.

Solution

The knowledge base is searchable by all users even when not authenticated. Results are determined by the user's role and access capabilities.

- Unauthenticated users can see only articles that are available to the general public
- Authenticated users can see articles that match their profile (for example, if you do not have Daimler in your profile, you cannot see Daimler specific articles.)
- If an article is available in the preferred support language of the user, that article is returned in the Search
- Otherwise the default language will be provided in English
- A browsable version of the KB under the Knowledge Base icon can provide the article in all available languages so that the user can make a choice.

FD09: HP knowledge base articles

HP eKMS - We need an export of the data currently stored in the HP Knowledge Base. These articles will be reviewed and then potentially imported into the new Support Portal.

Solution

Business gets a feed of this content from HP and will create articles in Liferay from this information.

FD10: Knowledge article creation

Ability to add, review and view knowledge articles. Ability to sort by content type, solution, etc. Ability to require review/approval before posting new/updated articles.

- Covisint is contractually required to include GM and Daimler in the approval of some KB content for Covisint HelpDesk use
- Access to content needs to be controlled based on the Active ID's profile (i.e.. Daimler IDs cannot see GM content), an Account ID that is associated with both Daimler and GM should see both customers' content

Solution

Business can create articles as content items in the CMS. Liferay provides the ability to include videos, images, attachments within an article.

Business can tag, permission and categorize articles which will affect what each user may access and which articles get returned in search results.

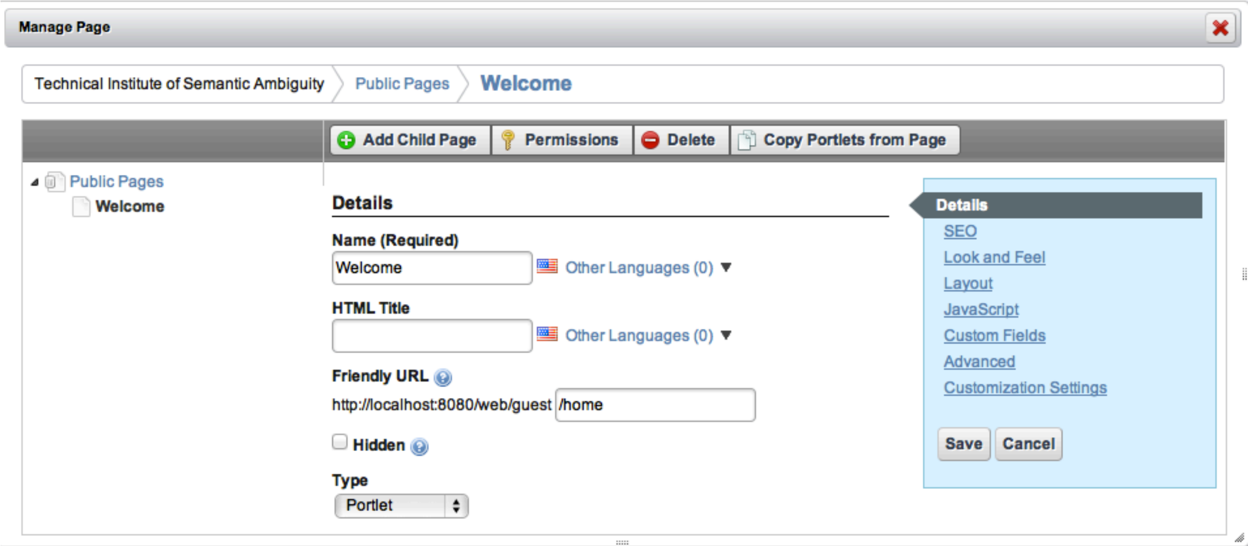
Tagging applies certain tags or categories to documents. Tagging can be done in Liferay out of the box by any person allowed to create content.

While **tags** can be created by any user who is able to create content, **categories** are a more organized and hierarchical structure similar to tags, but are maintained by higher level admins.

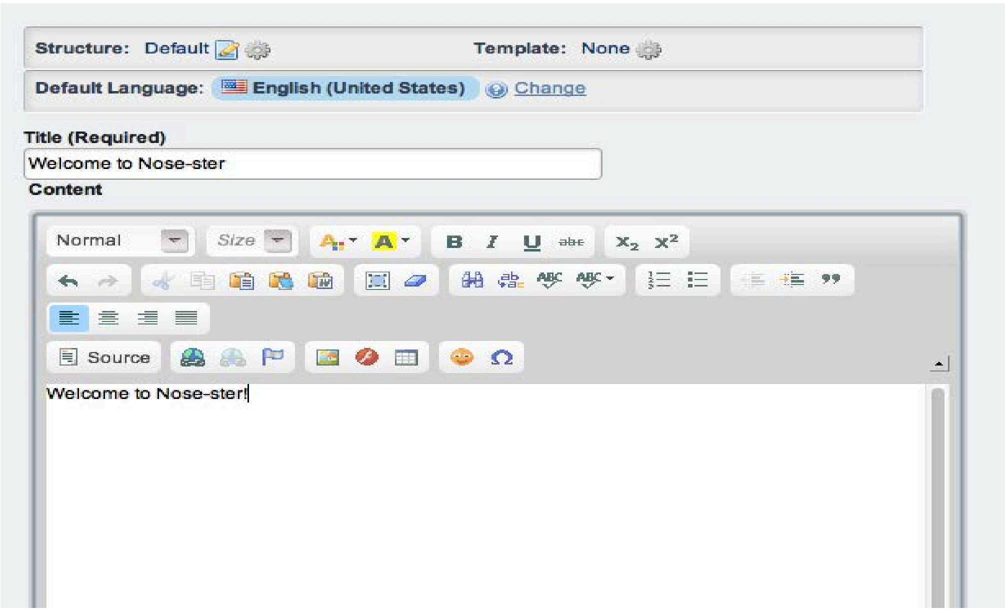
The Business will implement policies and standards and manage an administration process to define categories, create tags, and create and manage content.

Liferay provides the mechanism for requiring review/approval of before posting or updating articles.

Liferay CMS page creation interface:



The page content can be entered using WYSIWYG editor or as a direct HTML code.



Permissions are granted based on the Roles available within the Portal :

Role	Delete	Permissions	Update	View
Guest	☐	☐	☐	☑
Owner	☑	☑	☑	☑
Power User	☐	☐	☐	☐
User	☐	☐	☐	☐
Organization User	☐	☐	☐	☐
Site Member	☐	☐	☐	☑

Save

Articles must be able to be tagged and the service desk must be able to create new tags. These tags must be able to link to KB content items and have tagged article returned in search results based on search terms.

FD11: Knowledge base search

Ability to search the knowledge base for articles

Solution

Users can search the contents of knowledge base articles from the search bar on every page. The list of results displays the article title, linked to the article page, and a short summary, e.g. first 200 characters.

Fifty results are returned per page with pagination links at the bottom for accessing more results. The Search functionality will provide the ability to present results based on popularity, relevance, categories and tags.

Results are returned in the user's preferred language. If there are no results in the user's language, suggest that the user switch to English and search again.

The search query persists in the search box so that it is easy for the user to iterate on the query.

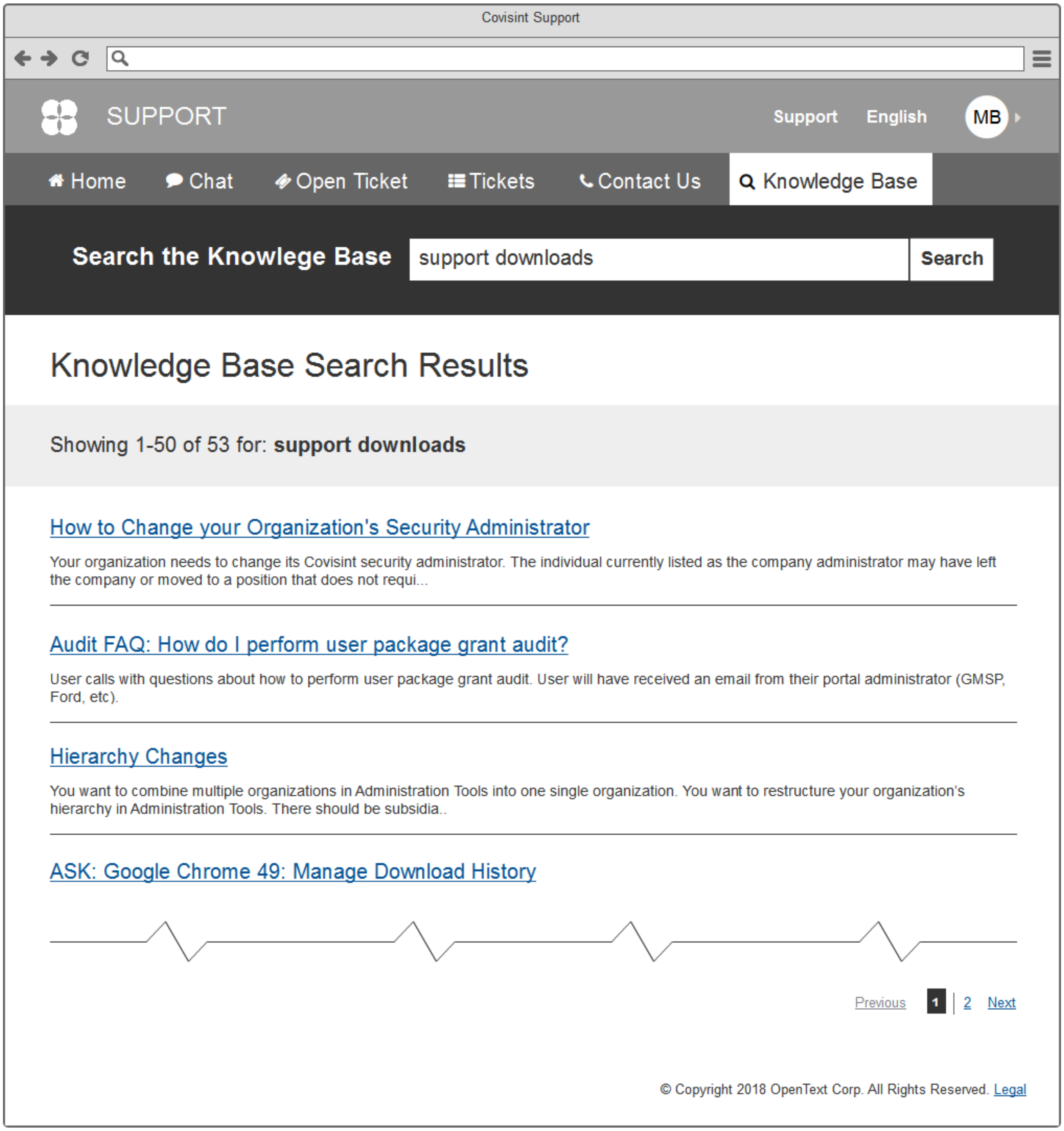


Figure 24: Knowledge base search results

If no articles match the search query, display “No articles matched your search for: <search query>” in the results bar and “Please try a different search term or browse the knowledge base.”—*browse the knowledge* links to the page defined in FD3.09.

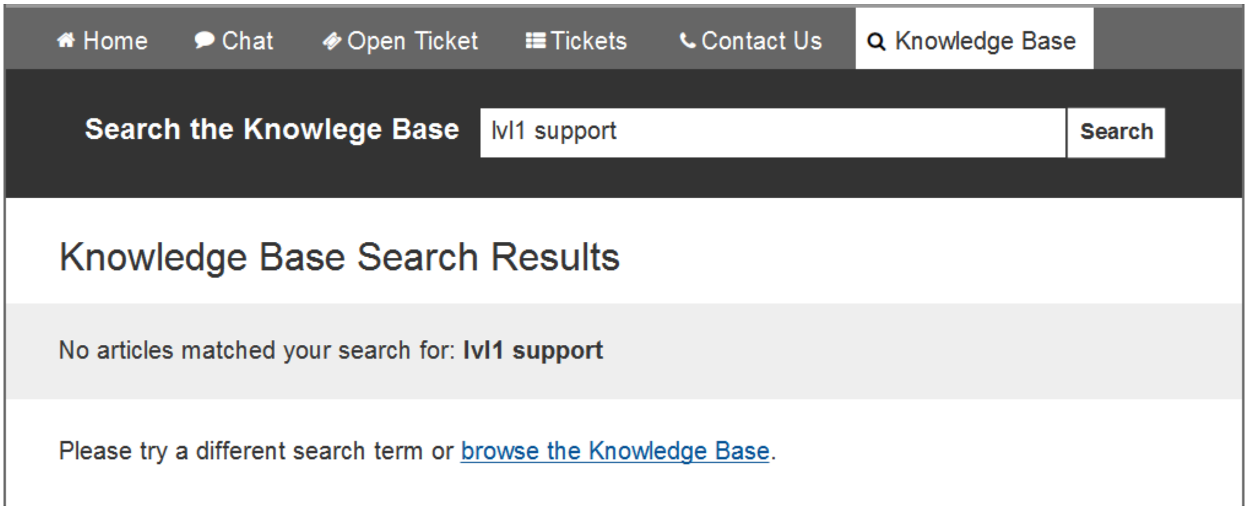


Figure 25: Knowledge base search - no results

Each article page displays the contents as marked up in CMS by the business.

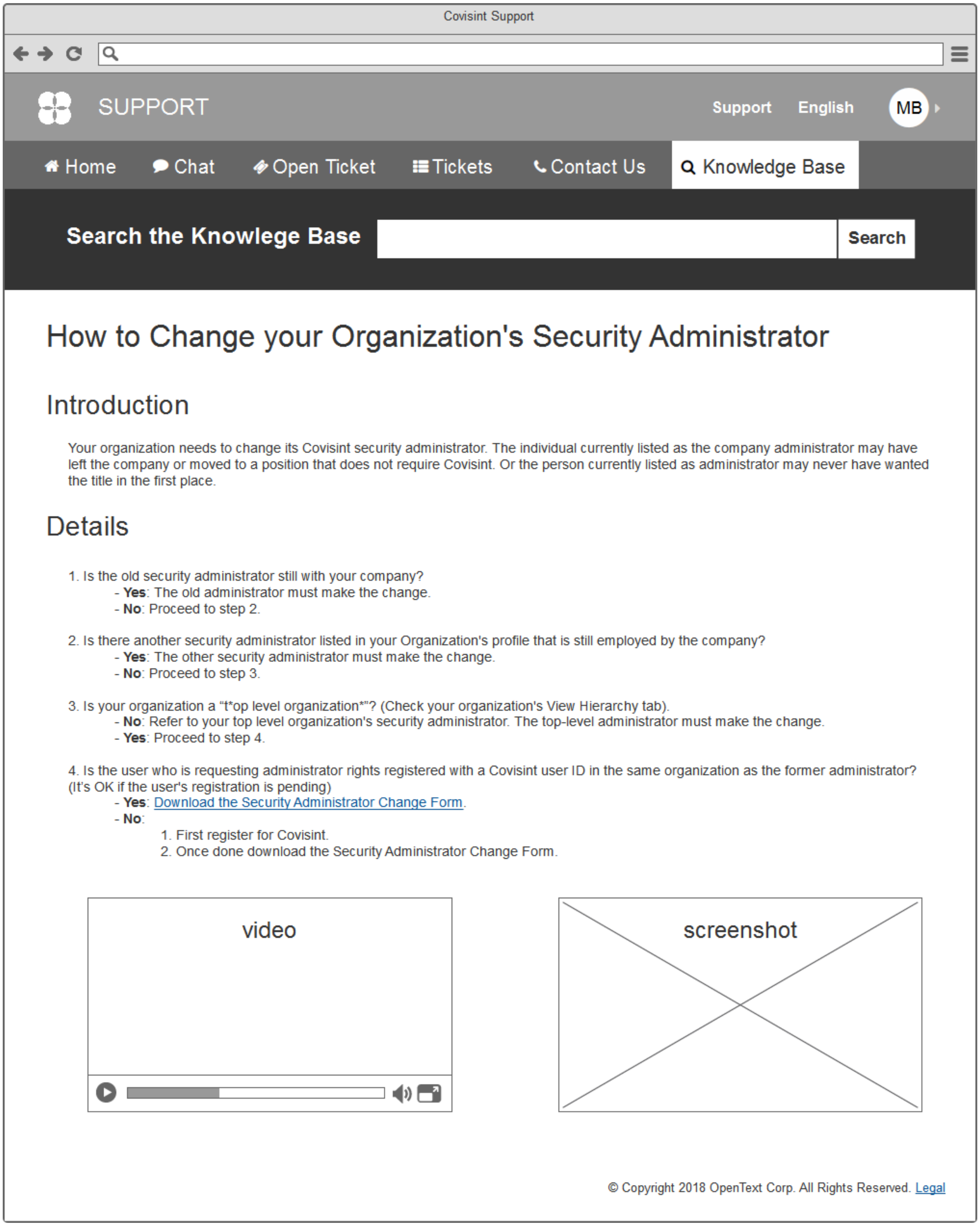


Figure 26: Knowledge base article page

Article rating is not included in this phase.

General Info

FD12: Appropriate Support areas

Ability to link to appropriate Support areas based on Product/Service in question.

Solution

Queuing from a Siebel perspective is based on choosing the Product Line when opening a new ticket (see FD3.02). This can be updated on an as-needed basis.

These are examples of some product lines. The final options need to be determined by the business.

- Automotive Portal
- EDI
- Healthcare
- WebEDI

As a result of a user selecting one of the Product Lines mentioned above, they will be presented with the ability to classify their issue based on an “Issue Type” category. These categories will be stored in Siebel as a Solution to an Asset, and will be sent to the Covisint Portal as a result of the user identification call mentioned in FD04 that will populate the Portal screens referenced in Solution FD3.02.

A Portal user will also have the ability to select, on a per-ticket basis, a language preference. For example, a user’s preferred language may be stored in CCA and Siebel as English, but they may prefer to correspond with us in Italian. Users can select the Language Type in the ticket form on the Portal, and that request will transfer to the SR object in Siebel, but will NOT update the Contact’s Preferred Language.

Given this information (Product Line, Issue Type, and Preferred Language), as tickets (Siebel Service Requests, or SRs) arrive in Siebel, the Siebel Assignment Manager (automated) will route SRs to the appropriate team/queue based on the values a user enters in these fields. More fields can certainly be included in the assignment criteria as needed and appropriate, such as Account Name for a dedicated support team model, or Country given a regional support model. Please note that the Siebel Assignment Rules can be built and modified in real time in the Production application.

FD13: Direct user to correct support level

Ability to direct Automotive Portal users to Level 1 Support and other Covisint users to Level 2+ Support from Covisint landing page.

Solution

This functionality exists in Siebel today.

Example: Automotive Portal normally goes to a L1 queue, but if the ticket is from an @gm.com email domain we would want the ticket to come directly to L2 queue.

Other Considerations

FD14: Branding

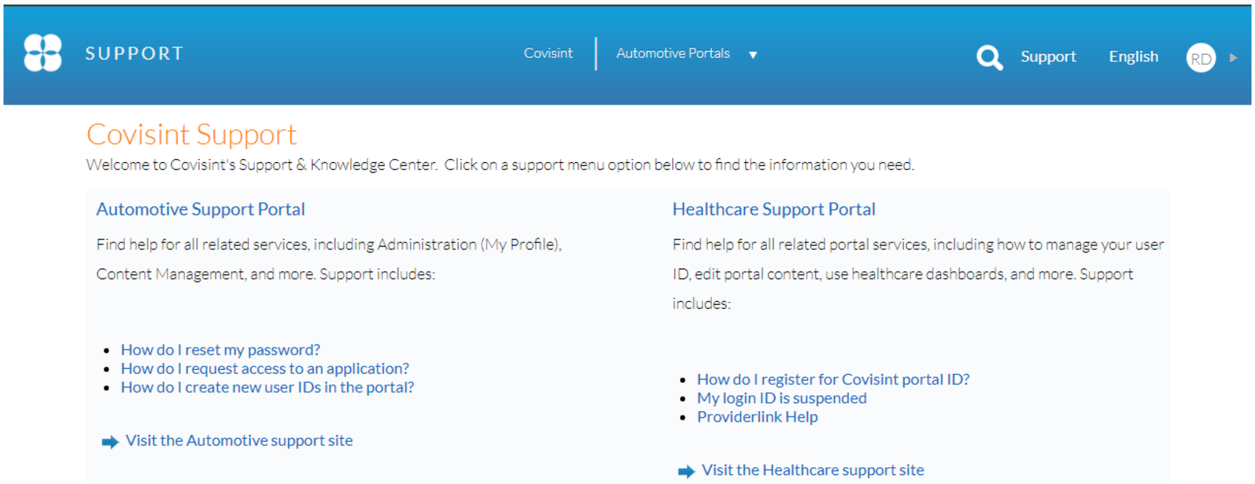
Portal needs to include Covisint branding. This may include menu navigation.

Solution

The visual design of the portal will be informed by the Covisint Support site look and feel. The goal is to align the support portal experience with other pages on the site.

Reference the existing template for design details.

Support Portal will emulate the header with “Support” logo and utility links (sign in, language, account tools). It should not include the “Automotive Portals” drop down.



When this branding changes, the Support Portal will be updated to reflect that.

FD15: Support SSO capability from the Automotive Portal to the Support Portal

Support SSO capability so that customers, suppliers and end users already in the Automotive Portal can easily access support, already authenticated. This experience is currently the practice with Covisint and HP for Automotive Portal users.

Solution

Real-time ID synchronization between Covisint Connect IDSync and Siebel will ensure Automotive Portal users can be recognized from Siebel before raising a ticket. See FD01: *Auto-provision users* for more details.

Users who are already logged into the Covisint Commercial Infrastructure will be able to click the Support logo on the header within the infrastructure to access the new Portal, and will remain authenticated and able to see and access all relevant features and functionality as determined by the users’ individual Account ID profiles

FD16: Ability to display alerts and system status messages

Ability to display alerts and system status messages in order to deflect calls in case of outages. These alerts and system status messages could include Covisint commercial infrastructure, but also maintenance, notices, and outages behind customers' fire walls (i.e.. GM billing systems, Daimler procurement, etc.)

Solution

The Business will institute a process whereby content for the Announcements section will be vetted before posting, and specific managers will be given Admin privileges to add and remove content. Generic announcements will be viewable by unauthenticated users. Richer and targeted content will be viewable to authenticated users, based on individual Account ID profiles and permissions.

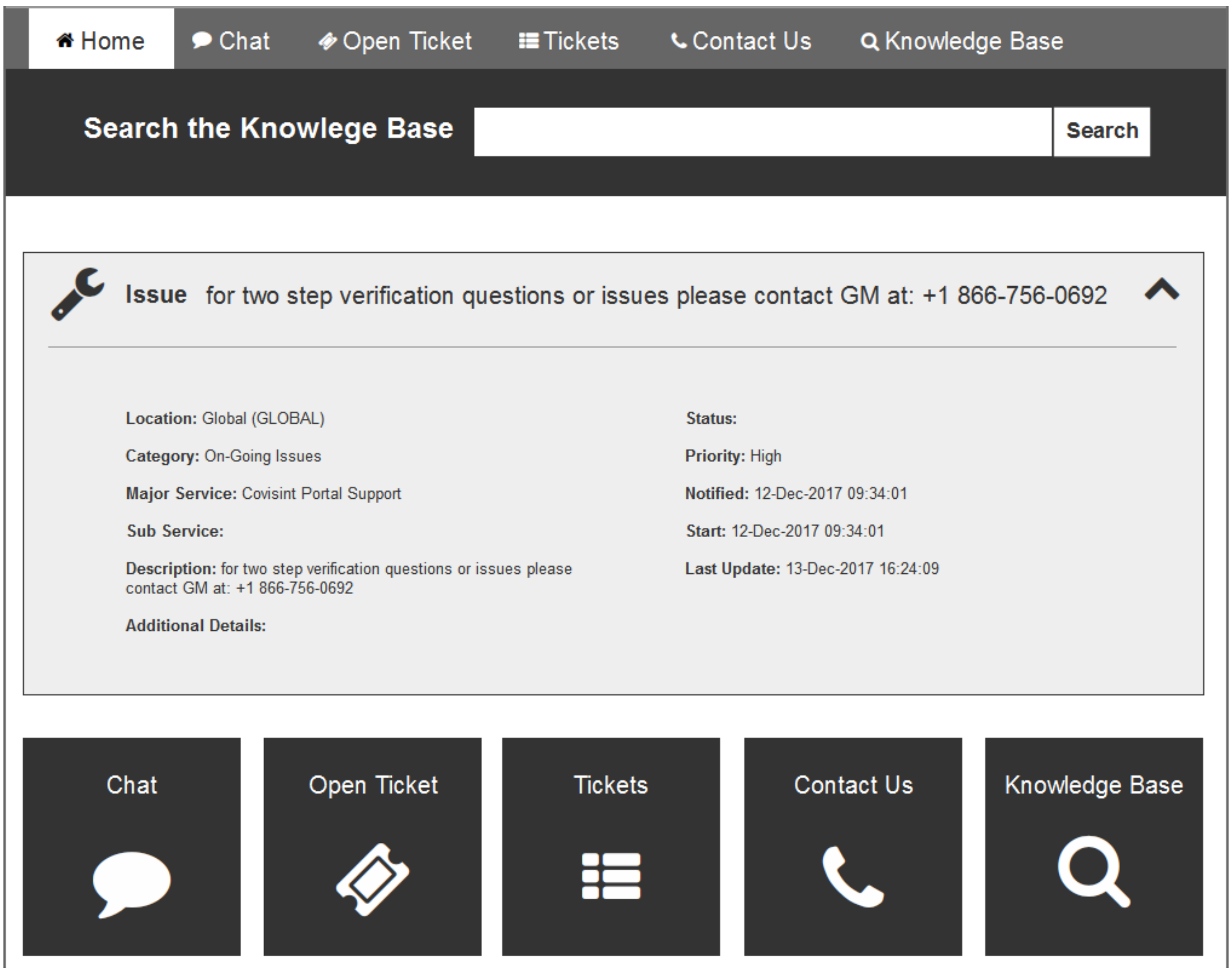


Figure 27: Expanded home page announcement

FD17: Ability to find Support phone numbers

Ability for users and guests to find support phone numbers based on product and geographical region.

Solution

There is a *Contact Us* page where the user selects his Product Line and his Region from dropdown menus. The page shows the contact numbers relevant to his selections only.

Business requests that the browser set a cookie to remember these preferences.

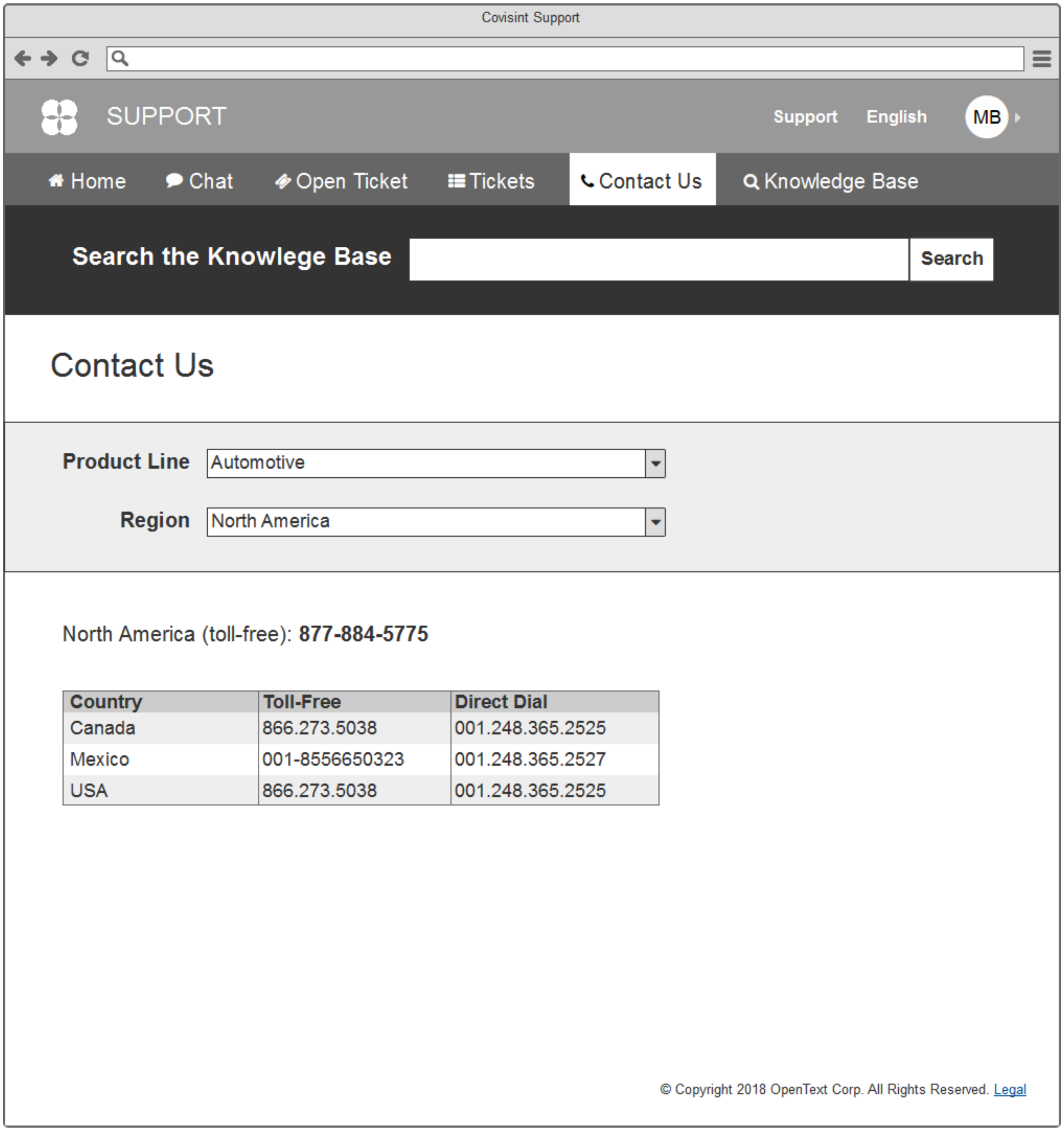


Figure 28: Contact us page with product line and region selected

FD18: Ability to add customers or users as cc's on tickets

Ability to add additional customers or users as cc's on tickets.

Solution

Functionality includes the ability to copy multiple individuals from multiple domains. Any addresses included in this field are not saved, and are intended as a one-time notification email only (see FD3.02).

FD19: Identify the primary language for a ticket

Ability to identify the primary language for a ticket. Siebel needs to understand the language of the ticket in order to be able to route to the appropriate queue, with the appropriate language resources to respond

Solution

The header contains a link that displays the user's language preference based on his Covisint user account preference. If no language preference is defined, or if the language in the user's Covisint Account profile is not available within the Support Portal, the default is English.

A user may update his language preference in his Covisint user account by selecting "Edit My Profile" from the account drop down menu.

A user may change the displayed language by selecting a new language from a drop down list in the header—this selection does not sync to his user account; it is used for the current session only.

After a user changes his language selection, whether through the "Edit My Profile" option or the "current session only" option, all translated labels, messages, navigation items, buttons etc. update to display the selected language where available.

This language preference will be the default selection for the "Language" field when opening a new ticket.

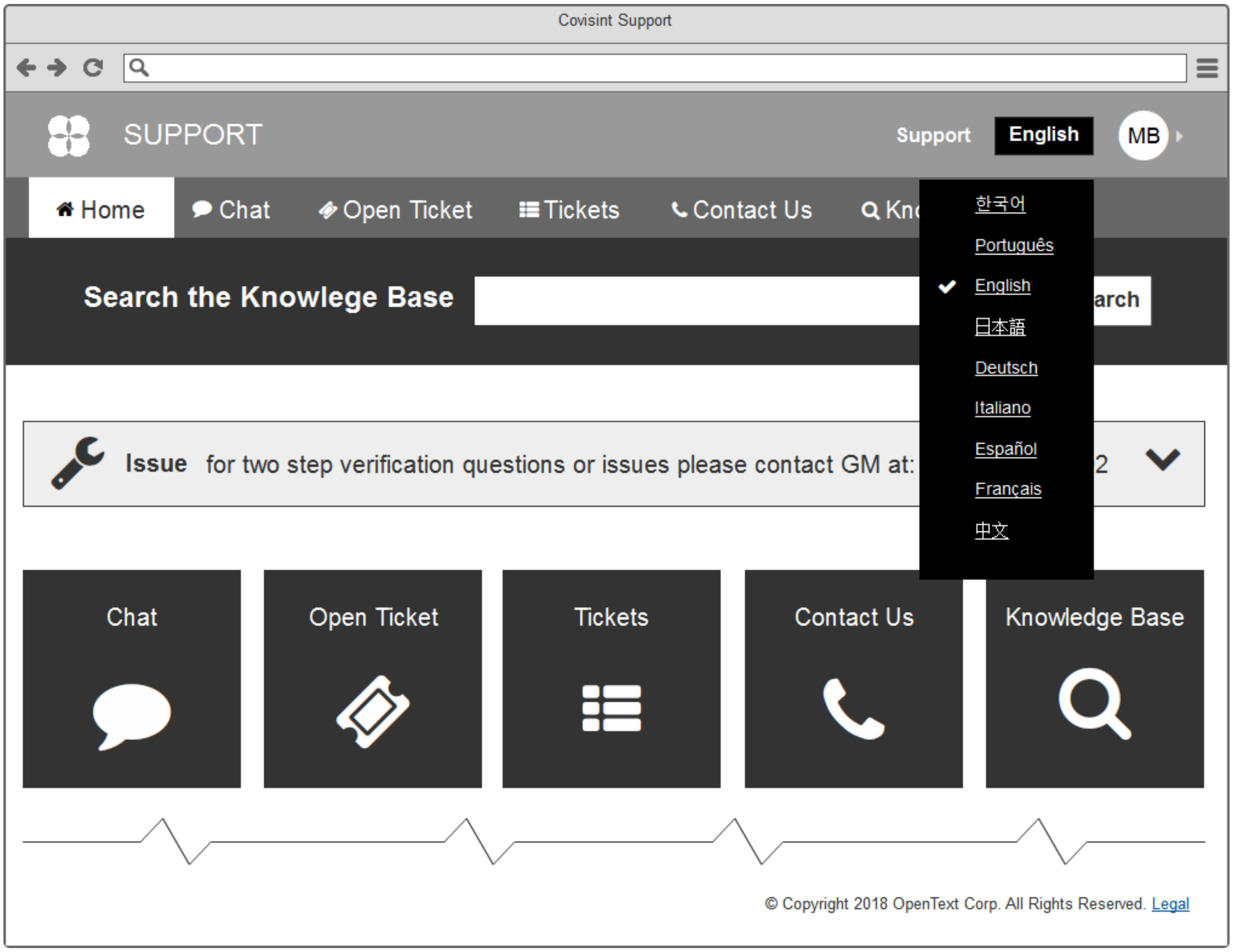


Figure 29: Language preference dropdown

FD20: Ability to add attachments to the ticket

Ability to add attachments (ie. gif, pdf, doc, txt, xls, etc.) to the ticket either by the requestor or the service desk agent.

Solution

Users can attach files when opening a ticket (FD3.02) and to an existing ticket (FD3.04).

File size limit: 100 MB for authenticated users otherwise 10 MB

File types allowed for all users (file type extensions):

Images / Video	Text
• jpg • gif • png • jpeg • jpe • jfif • avi	• txt • log • doc • docx • pdf • htm • html

Authenticated customers only may also upload types

- zip
- gz
- tgz

FD21: Ability to add internal comments visible only to the support team

Ability to add internal comments to a ticket and these comments would not be visible within the Support Portal.

Solution

Siebel already provides the ability to add internal comments to a ticket. This field will not be linked to/visible in the Support Portal at all. Internal support team staff can view these comments from within Siebel app.

FD22: Ability to print tickets in form format

From time to time, customers will request the ability to print ticket information.

Solution

This requirement is currently not met for Tickets features in the current functional design. This capability can be added at a future date post launch. BoldChat sessions can be printed or emailed.

FD23: Mobile Friendly

Support Portal is mobile device friendly.

Customers expect and assume that all new websites are designed to be mobile friendly. Designing the Support Portal from the beginning to be mobile friendly will not only ensure a positive customer experience from launch, but save significant effort and resources in re-designing and building a mobile experience in the future.

Solution

Include responsive design as part of the development framework. Any screens that employ the grid concept for displaying ticket information require a different layout as the grid is not mobile friendly.

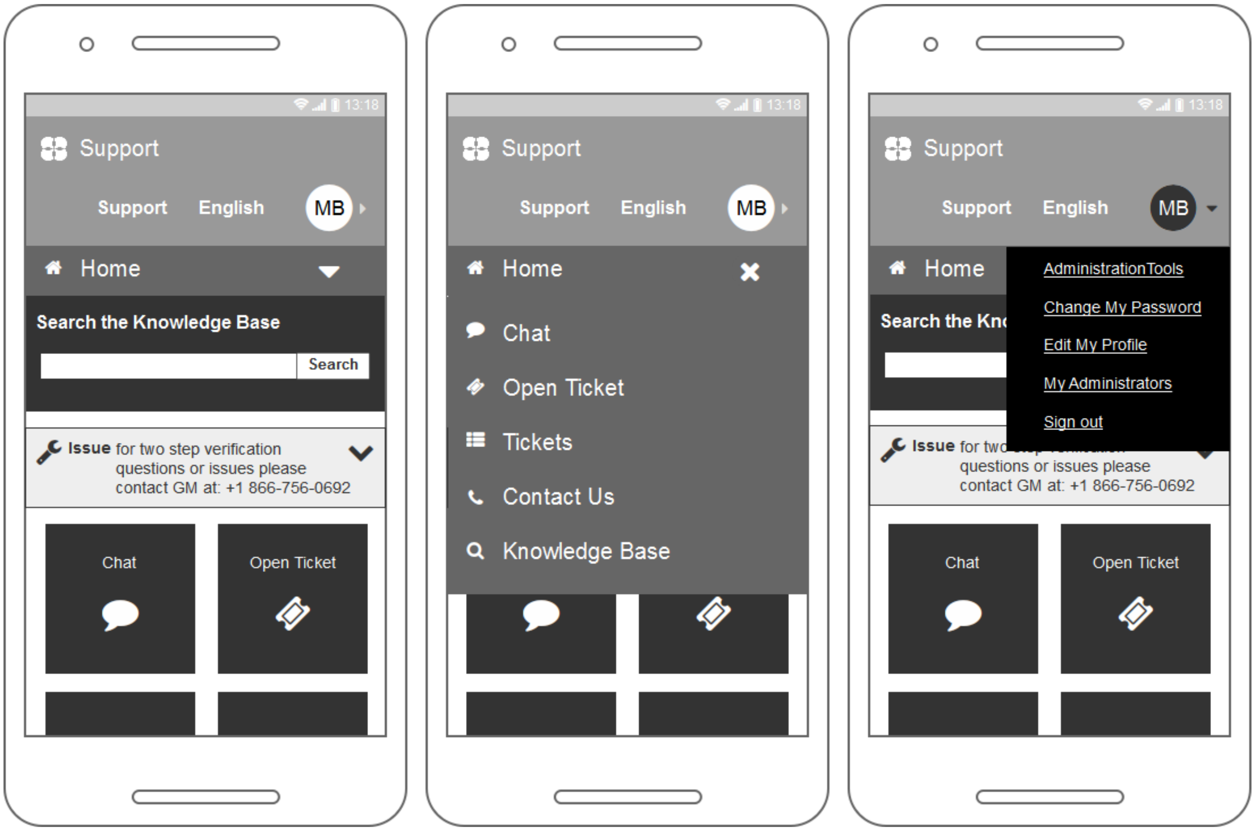


Figure 30: Mobile Home Page - signed in

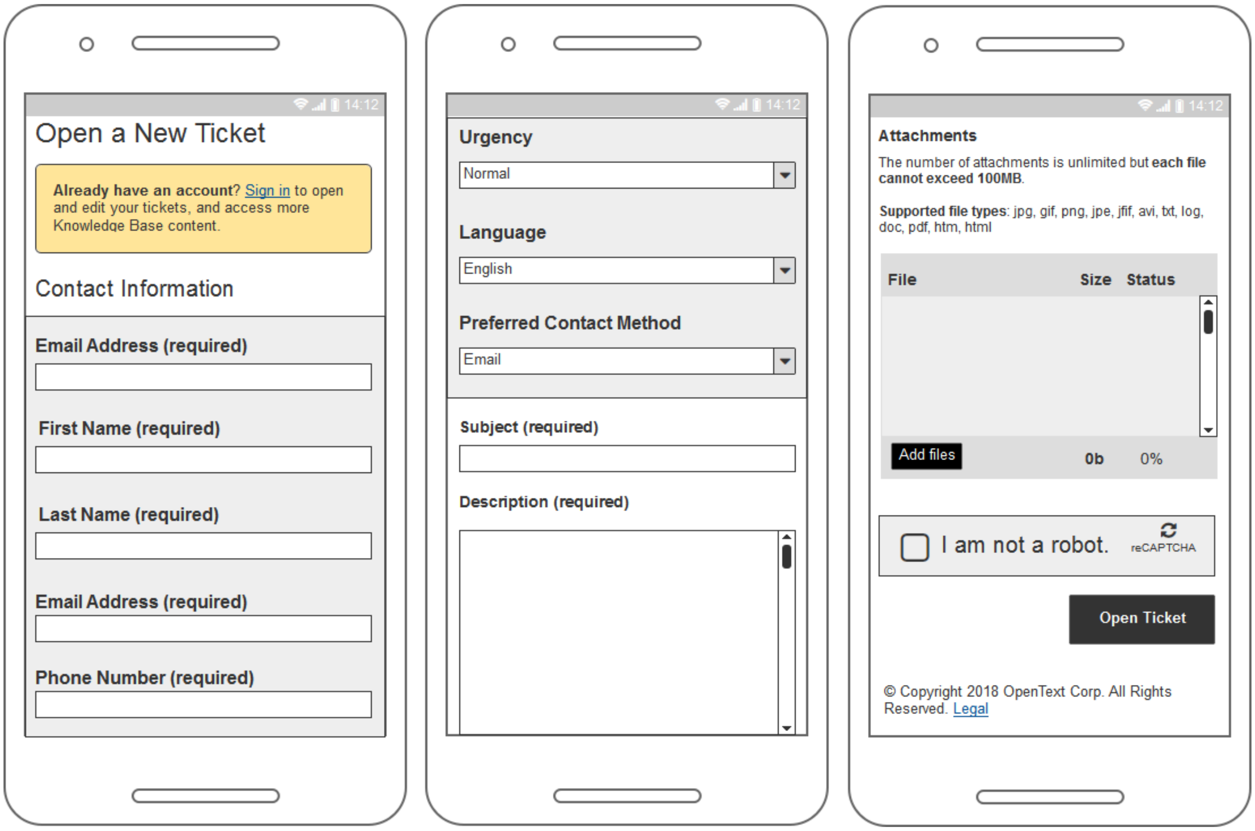


Figure 31: Mobile New Ticket Form - not signed in

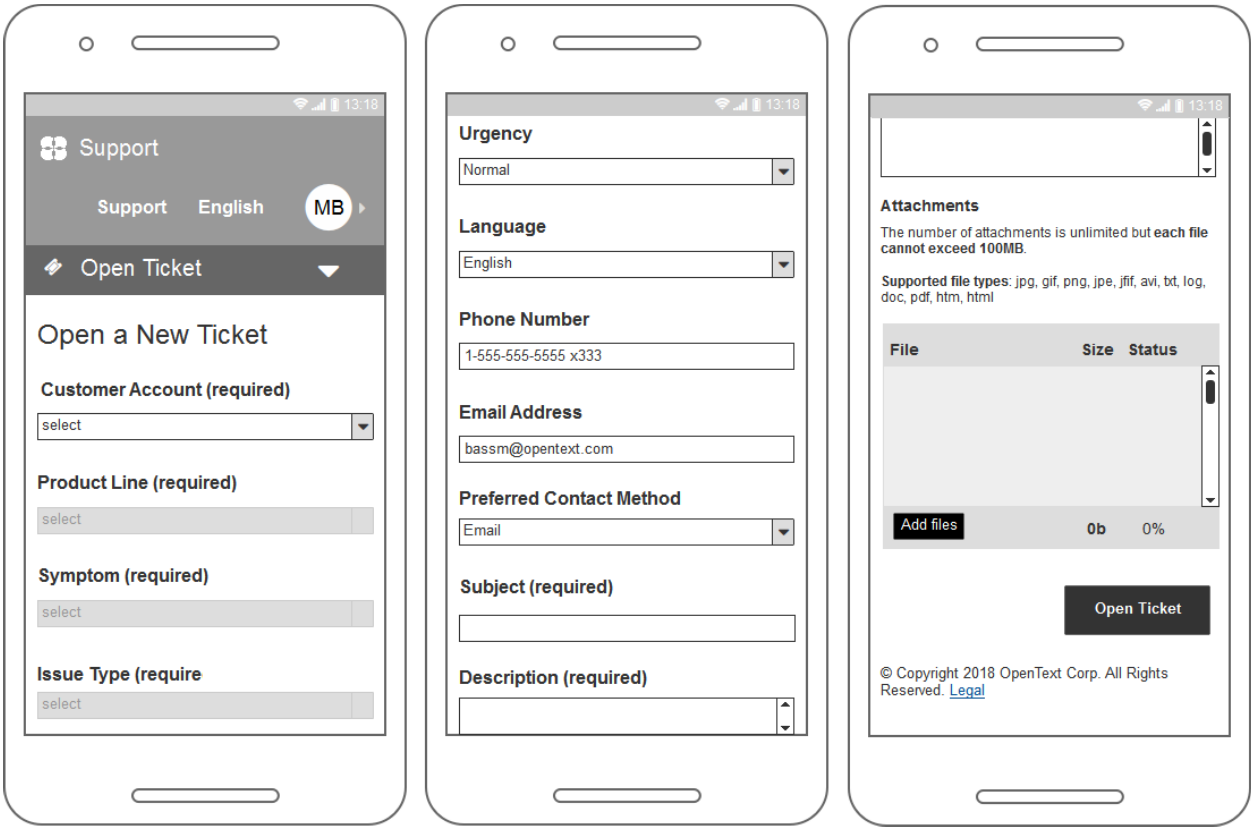


Figure 32: Mobile New Ticket Form - signed in

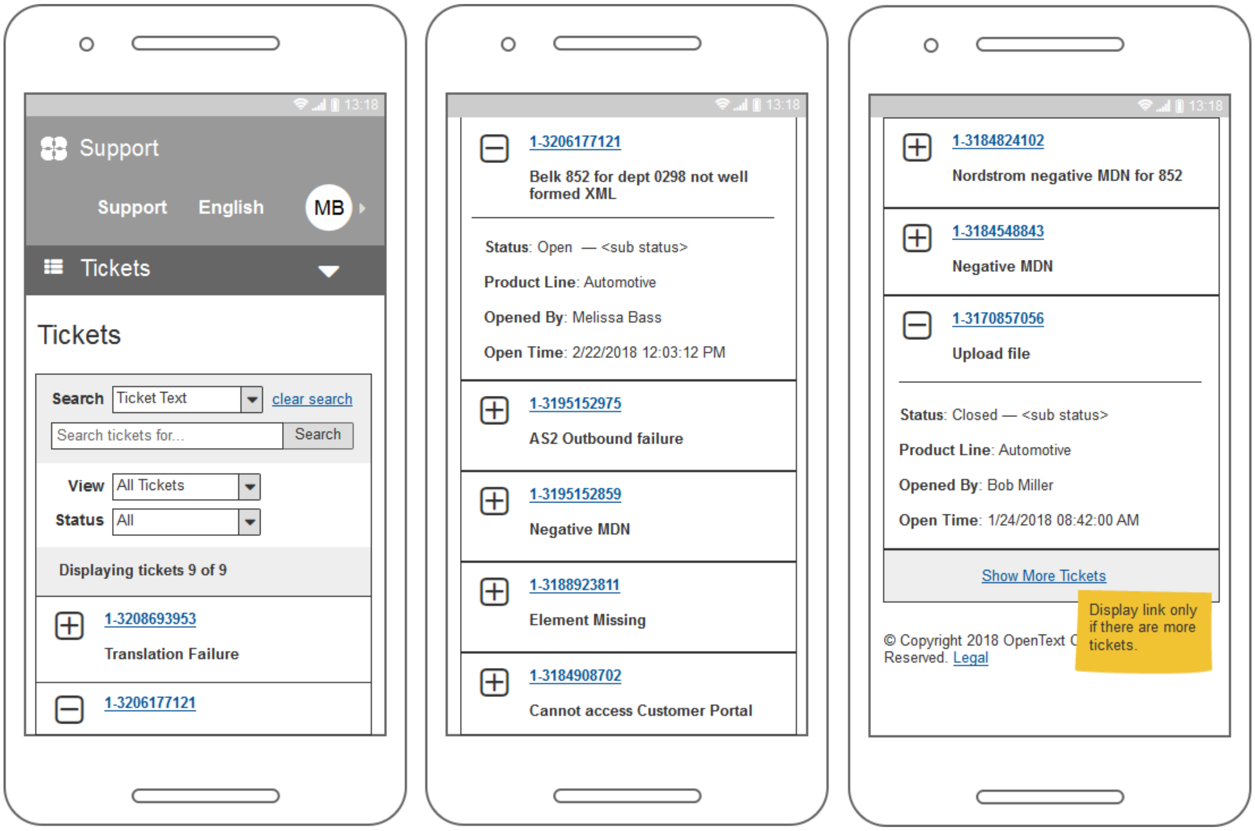


Figure 33: Mobile Tickets page

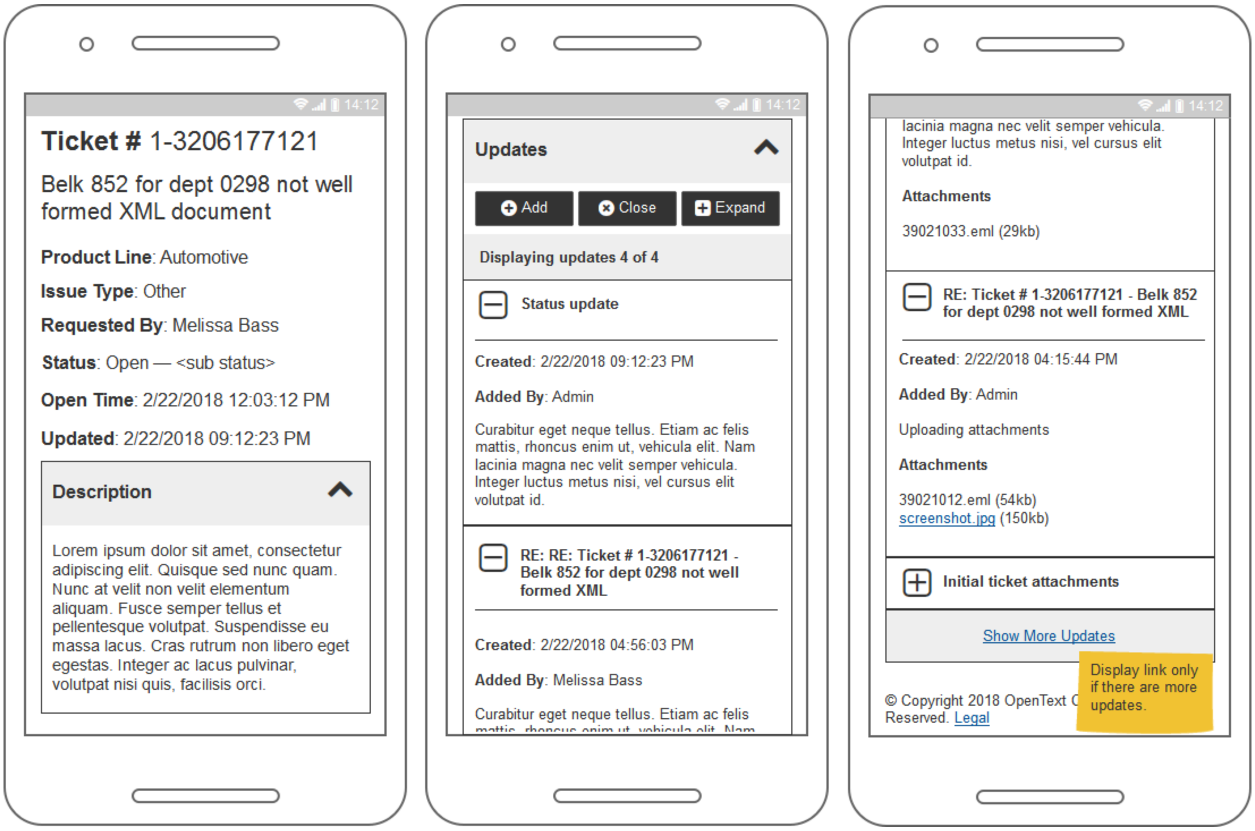


Figure 34: Mobile View Ticket page

FD24: Accessibility

The site must comply with the Accessibility for Ontarians with Disabilities Act, 2005 (AODA).

Solution

Pages and content must be designed and developed according to the [Web Content Accessibility Guidelines 2.0 Level A] as required by the AODA for all new and refreshed Internet websites and web content by companies based in Ontario with 50+ employees, effective 31 December 2014.

There are 25 success criteria under four categories:

1. **Perceivable** (9 criteria) – Information and user interface components must be presentable to users in ways they can perceive.

   Example: Non-text content (images) has alternative text.

2. **Operable** (9 criteria) – User interface components and navigation must be operable.

   Example: Site must be usable with a keyboard only.

3. **Understandable** (5 criteria) – Information and the operation of user interface must be understandable.

   Example: Provide labels and instructions for all forms.

4. **Robust** (2 criteria) – Content must be robust enough that it can be interpreted reliably by a wide variety of user agents, including assistive technologies.

   Example: In content implemented using markup languages, elements have complete start and end tags, elements are nested according to their specifications, elements do not contain duplicate attributes and any IDs are unique.

Best practices dictate compliance with Level AA and the AODA will require all websites to comply by 2021 (with two exceptions). Level AA builds off Level A.

Examples:

- Text has a contrast ratio of at least 4.5:1 against background colors and images if text is less than 18pt and not bold.
- Text can be resized up to 200% without loss of content or functionality.
- During keyboard operation, the UI displays a focus indicator on links, buttons, form fields.

There are a multitude of automated testing tools for assessing basic conformity (the best catch 30-40% of potential issues) that work in combination with human testing (does the alt text for an image make sense).

Examples:

- aXe (the accessibility engine) browser extensions
- WAVE (web accessibility evaluation tool) browser extensions
- Lighthouse accessibility audit in Chrome developer tools

For additional information, please contact:

Rachele DiTullio
rditulli@opentext.com
Information Architect, IT Enterprise Business Systems – Web Team
OpenText Corporation