

Draft Requirements and Notes on Technical Development

The information presented in the “Draft Requirements and Notes on Technical Development” document is to be used to provide guidance on the development of Proposals for the rebuild of EfficiencyVermont.com. These documents will evolve based on input from the Graphic Website Developer and the Technical Website Developer. In their current state they do not represent a comprehensive overview of our proposed website. Instead they represent a portion of our documented thinking on how to create an easy to navigate site that connects the Customer to the appropriate Efficiency Opportunity.

Customer Type and Efficiency Opportunities:

1. Visitors will be pre-qualified at three initial levels: Residential, Business & Partner, and/or via the selection of a Customer Type (inclusive of all Initial levels of pre-qualification).
2. This pre-qualification may be done by a simple selection of a drop-down to indicate the Section and Customer Type, or we may employ more complex tools to aid usability.
3. When the Customer Type is determined, the visitor will be given a list of Efficiency Opportunities.
4. A Customer May also navigate the site by choosing specific Efficiency Opportunities.

1. Customer Type:

- a. Allow VEIC CMS users to create and edit Customer Types and their associated content within the Sitefinity CMS.
- b. Allow VEIC CMS users the ability to associate and disassociate Customer Types with the correct Efficiency Opportunities (multiple).
 - i. This needs to function across the Residential, Business and Partner Section.
- c. The content for Customer Type will be organized into several areas, each displayed under individual tabs for a given Customer Type content page.
 - i. Some of these areas will be "simple" generic content, such as: Information, Benefits, and Project Profiles.
 - ii. Other areas will be dynamic, linking to content generated by another section of the website. Examples of dynamic content include: Efficiency Opportunities, Rebates, Link to Purchase & Partner Locator, and Blogs (Energy Solutions Column).
 - iii. Each Customer Type may utilize some but not all of the possible areas of content.
 - iv. We require the ability to create new tabs for the Customer Type as needed during future development of the site.
 - v. Customer Types need the ability to dynamically display different content tabs based on where a customer is on the Site. The Tabs need to be associated with major content sections (RES, BES, and Partner) so that for a particular Customer Type the content displayed in the Residential Section may be different from the Content displayed in the Partner Section.
 - vi. Allow VEIC CMS users to create links to Specific Customer Type pages in a variety of ways.

2. Efficiency Opportunities:

- a. Allow VEIC CMS users to create and edit Efficiency Opportunities and their associated content within the Sitefinity CMS.
- b. Allow VEIC CMS users the ability to associate and disassociate Efficiency Opportunities to the correct Customer Types (multiple).

- i. This needs to function across the Residential, Business and Partner Sections.
- c. Efficiency Opportunities can have Efficiency Categories (A set of Efficiency Opportunities), which may be reachable based on the initial list of Efficiency Opportunities or via links from parent programs, or from Customer Type Pages.
- d. The content for Efficiency Opportunities will be organized into several areas, each displayed under individual tabs for a given Efficiency Opportunity content page.
 - i. Some of these areas will be "simple" generic content, such as: Information, Benefits, and Project Profiles.
 - ii. Other areas will be dynamic, linking to content generated by another section of the website. Examples of dynamic content include: Rebates, Link to Purchase & Partner Locator, and Energy Solutions.
 - iii. Each Efficiency Opportunity may utilize some but not all of the possible areas of content.
 - iv. We require the ability to create new tabs for both Efficiency Opportunities and Customer Types as needed with future development of the site.
 - v. Efficiency Opportunities need the ability to dynamically display different content tabs based on where a customer is on the Site. The Tabs need to be associated with major content sections (RES, BES, and Partner) so that for a particular Efficiency Opportunity the content displayed in the Residential Section may be different from the Content displayed in the Partner Section.
 - vi. Allow VEIC CMS users to create links to Specific Efficiency Opportunity pages in a variety of ways.

Marketplace Requirements:

Value Proposition:

"The Marketplace is a ratepayer's tool to help them take the next step towards acting on an efficiency opportunity by finding an Efficiency Vermont Partner"

Overall:

- Dedicated Purchase and Partner Locator page for each section of site (RES, BES, Partner);
 - Have the ability to view all partners in any section.
 - IE See RES Partners from the BES Section
- Efficiency Measures will have Purchase and Partner locator, where possible;
- Auto populate alongside Efficiency Opportunity specific information;
 - Example: In refrigerator opportunity, auto show refrigerator retailers);
- Functionality Specs:
 - Filter via drop list (not checkbox);
 - List View;
 - Map View; (integration with Google Maps)
 - Use IP address to Display Partners in customer's proximity, until customer enters a ZIP, then distance based from geographic center of zip code. .
 - Ability to create a link with specific Efficiency Opportunities and or Specialties Selected. (IE, link from within text to a preselected group of partners)
 - Ability to show/link to Available rebates from Rebate Center, and the ability to link to partner list from rebate center for each efficiency opportunity.
 - Integration with our Existing Marketplace Database.

Changes from Current Marketplace:

<http://www.encyvermont.com/pages/Residential/Marketplace/>

- Re-organize categories of partners to align with Efficiency Opportunities

- Create Sub Categories (Specialties) within each Efficiency Opportunities category
- Parse data to only include Partners who completed a project in the previous year. (To be listed in 2010, must have completed 1 project in 2009).
- Keep or reduce the number of information fields displayed in the results (Remove "Diagnostics" field).

Cash Incentives (Rebates) Section of the Website:

Goal of Cash Incentives:

- Catalog all Efficiency Vermont rebates & incentives in a single place
- To provide an alternate channel to learn about our efficiency opportunities (for those customers that come to our site only looking for rebate info. Customer need noted by CS, in particular.)
- Adding Value to (or showing the value of) Efficiency Vermont
- Providing the monetary incentive for a customer to take action
- Easy to use for the customer

Overall:

- Dedicated Cash Incentives page for each major section of site (RES, Business, Partner);
 - Have the ability to view all Rebates and Incentives for any section, by customer types, or by equipment/technology.
 - IE Sort to see RES lighting Rebates in the Business Cash Incentives Section
 - Incentives from both RES & Biz that apply to a customer type will be flagged to appear for that customer type, so that there is a seamless integration for the external customer. (IE. Window AC units could appear for small business, even though they are considered a RES rebate internally)
- All Efficiency Opportunities will have specific Cash Incentives listed where possible;
 - Auto populate alongside Efficiency Opportunity specific info;
 - Example: In Refrigerator Opportunity, automatically show refrigerator rebates & incentives);
- Technical Specs:
 - Filter via drop list (not checkbox);
 - List View;
 - Ability to create a link with specific Efficiency Opportunities and/or Specialties Selected. (IE, link from within text to a preselected rebate or incentive)
 - Ability to show/link to Partners (where to buy/find contractor, etc.) from Cash Incentives section.
 - May link directly to the rebate or incentive it's self, or may link to a page outlining more information about the rebate or incentive (HPwES incentives page for example).

Criteria type of information in the rebate center:

- Specific monetary incentives and rebates available to customers
- Not a custom opportunity
- Rebates and Incentives should be straight forward (easy for a customer to digest/comprehend)
- Promotional language, not technical.
- Show monetary value and & estimated future savings (environmental or monetary)
- Must be tied to a Efficiency Vermont opportunity

Key findings:

- We need flexibility in the display of rebates (all rebates aren't alike)
- Cross Selling – show similar rebates
- Set categories of rebates – at least on the RES side (seasonal or year round rebates) (incentives & rebates)

- Graphical Interface to rebate center?
- Business Rebates probably won't change dramatically in content over the course of the next year.
- Show example products with rebate amount – hang example carrots of rebate info (Garage LED \$300, T8 \$50, etc).

Calendar:

- Displays events for RES, BES and Partners (via filters);
 - Calendar view;
 - List view;
 - Map view.
- Utilize existing events tracking database.
- Types of Events:
 - Trainings; (with links to signup pages, etc)
 - Efficiency events;
 - Wattson appearances;
 - Etc.

Notes on Technical Development:

1. CMS – Sitefinity
 - a. C#
 - b. Custom Modules (5 or less)
 - i. Will manage CRUD operations for data in the custom tables in the database.
 - ii. Will manage the relationships between the data in separate tables.
 - iii. The Main Identified Custom Modules are:
 1. Customer Type Management and Data
 2. Efficiency Opportunity Management and Data
 3. Custom Rebate Module
 - c. Custom User Controls (10 or less)
 - i. Will display information stored in custom tables from the database.
2. Backend Database Development
 - a. SQL Server 2005.
 - b. There will need to be tables created in the Sitefinity Database to manage the data on the website.
 - c. The data structure is new so the creation of these tables and the relationships between the data will be created from scratch.
 - d. The data entities will include at least:
 - i. Efficiency Opportunity
 - ii. Customer Type
 - iii. Rebate
 - e. Each Customer Type can have many Efficiency Opportunities, and each Efficiency Opportunity can have many Rebates.
3. Google Maps API/Database Work (for Marketplace data)
4. Dynamic PDF Generation
5. Sitefinity Page Development
 - a. Master Pages Creation
 - b. Templates Creation
6. Create or modify Custom Sitefinity Controls including:
 - a. Navigation
 - b. News reader
 - c. Blogs
 - d. RSS Feeds
 - e. Sitemap Controls

- f. User Editable Custom Forms (Contact, Training Signup, etc)
7. Work with the Design Contractor to Implement a CSS Framework Documentation
8. Implement Site Search & Results
9. Employ Search Engine Optimization (SEO) best practices
10. Integrate Google Analytics for comprehensive reporting
11. Meets ADA Requirements – The site should be developed to meet all Federally-mandated access requirements adopted by the Federal Access Board under section 508 subsection 1194.22 of the Rehabilitation Act.
12. Cross Browser Compatibility:
 - a. PC, Mac, UNIX-based users/clients)
 - b. IE 6, 7 & 8, Chrome, Firefox, Opera, Safari
 - c. Basic Mobile (iPhone) accessibility.

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