

Welcome.
The training will begin shortly.





CrownPeak

An Introduction to Projects in CrownPeak

[Presenter]

[Email]

[Date]

- ✓ Types Of CrownPeak Projects
- ✓ Project Audits And Reviews
- ✓ Best Practices And Quick Start Tools
- ✓ Create Project Information Documentation (PID)

ENGAGEMENT TIP



Mute
Button

Listen
Actively

Ask
Questions

CROWNPEAK PROJECTS

CROWNPEAK PROJECTS

- ✓ Review the different types of partner-led projects
- ✓ Review project activities that CrownPeak should implement, review or support
- ✓ Identify points of contact

CRITERIA FOR SUCCESSFUL PROJECTS

1

GET TRAINED
AND LEVERAGE
RESOURCES
(SUPPORT,
ENABLEMENT,
CONNECT)

2

FOLLOW AND
UNDERSTAND CMS
BEST
PRACTICES

3

CREATE AND
PROVIDE
DOCUMENTATION
FOR CROWNPEAK
SUPPORT TO
UNDERSTAND THE
ARCHITECTURE
POST-LAUNCH

MAINTENANCE PROJECTS

These projects include template and configuration updates for existing sites.

FOR SUCCESS, PARTNERS SHOULD

- 1 Complete CrownPeak developer training
- 2 Understand the CrownPeak Architecture and platform
- 3 Make updates according to best practices
- 4 Update support documentation as needed

BUILDING SITES FROM EXISTING MODELS

These projects include creating new sites in existing CrownPeak instances by leveraging existing models, templates, and CMS configurations.

FOR SUCCESS, PARTNERS SHOULD

- 1 Complete developer training
- 2 Understand the CrownPeak Architecture and platform
- 3 Understand project milestones and deliverables
- 4 Include CrownPeak effort and time in project estimates for configuration tasks, project review, and developer support
- 5 Deliver user and support documentation to CrownPeak

NEW IMPLEMENTATIONS

These projects include designing and implementing new instances for new customers.

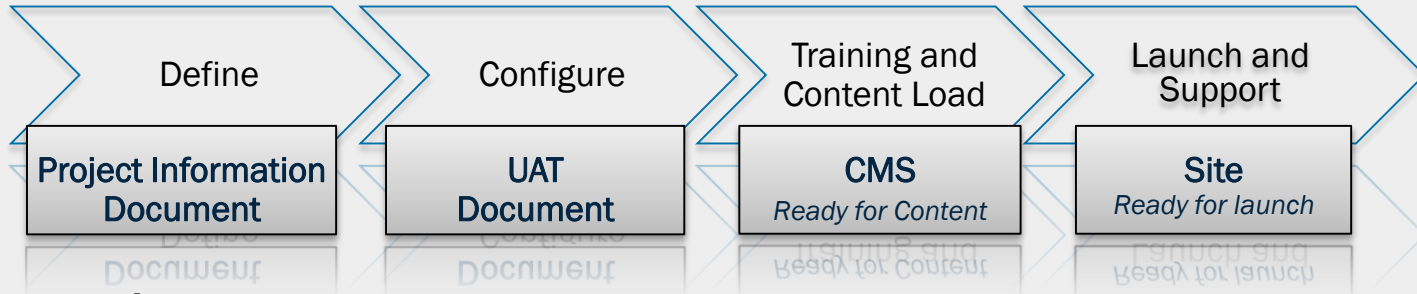
FOR SUCCESS, PARTNERS SHOULD

- 1 Complete developer training
- 2 Understand the CrownPeak Architecture and platform
- 3 Complete CrownPeak Project Planning training
- 4 Include CrownPeak to provide expert services for architecture review, component design, and advanced capabilities (typically 20%)
- 5 Complete remediation based on reviews
- 6 Deliver design, user, and support documentation to CrownPeak

CROWNPEAK CONFIGURATION PROCESS FOR NEW IMPLEMENTATIONS

A successful 12 week Configuration requires a collaborative process.

- Users & Roles
- Permissions
- Authoring Experience Design
- Workflow Design
- CMS Instance Setup & Config
- HTML Integration
- Template Configuration
- Integration Configuration
- Hosting Environment
- Publishing setup
- Quality Assurance
- User Acceptance Training & Testing
- Author Training
- Refinements
- Author Driven
- Offshored
- Launch Planning
- Transition to Support



CROWNPEAK SERVICES FOR A PARTNER PROJECT

CrownPeak provides the following services to partners:

- Partner Training
- Joint Estimates
- Architecture / Design Recommendations
- CMS Setup
- Technical Architecture reviews
- Code Reviews
- Implementation Recommendations
- Feature configuration (Search, Fed Auth, WCO, TAM, etc.)
- End user Training
- Launch Preparation support
- Post-Launch Support



INCLUDING CROWNPEAK SERVICES

Task	CrownPeak Review	CrownPeak Responsible
Joint Estimates	X	
Architecture and Design recommendations	X	
Weekly Tech Reviews/ Architectural reviews	X	
Kickoff & Discovery	X	
CMS Configuration	X	
CMS implementation configuration	X	
Search Configuration		X



INCLUDING CROWNPEAK SERVICES

Task	CrownPeak Review	CrownPeak Responsible
Blog Configuration		X
TMF configuration		X
URL Redirects		X
WCO/Personalization		X
QA and UAT	X	
Launch support	X	
Post Launch support	X	X
Training	X	X

- ✓ Training requests and questions
 - training@crowpeak.com
- ✓ Partner Training
- ✓ Advanced Capabilities Training
- ✓ End User Training

- ✓ Product Support – Partners have 4 hrs./month
 - support@crowpeak.com
- ✓ Launch Preparation Support
- ✓ Post-Launch Support
- ✓ Product questions
- ✓ Troubleshooting

✓ Project Support

- Eric Marking –
eric.marking@crowpeak.com

- ✓ Joint Estimates
- ✓ Architecture / Design Recommendations
- ✓ CMS Setup
- ✓ Technical Architecture reviews
- ✓ Code Reviews
- ✓ Implementation Recommendations
- ✓ Feature configuration (Search, Fed Auth, WCO, TAM, etc.)

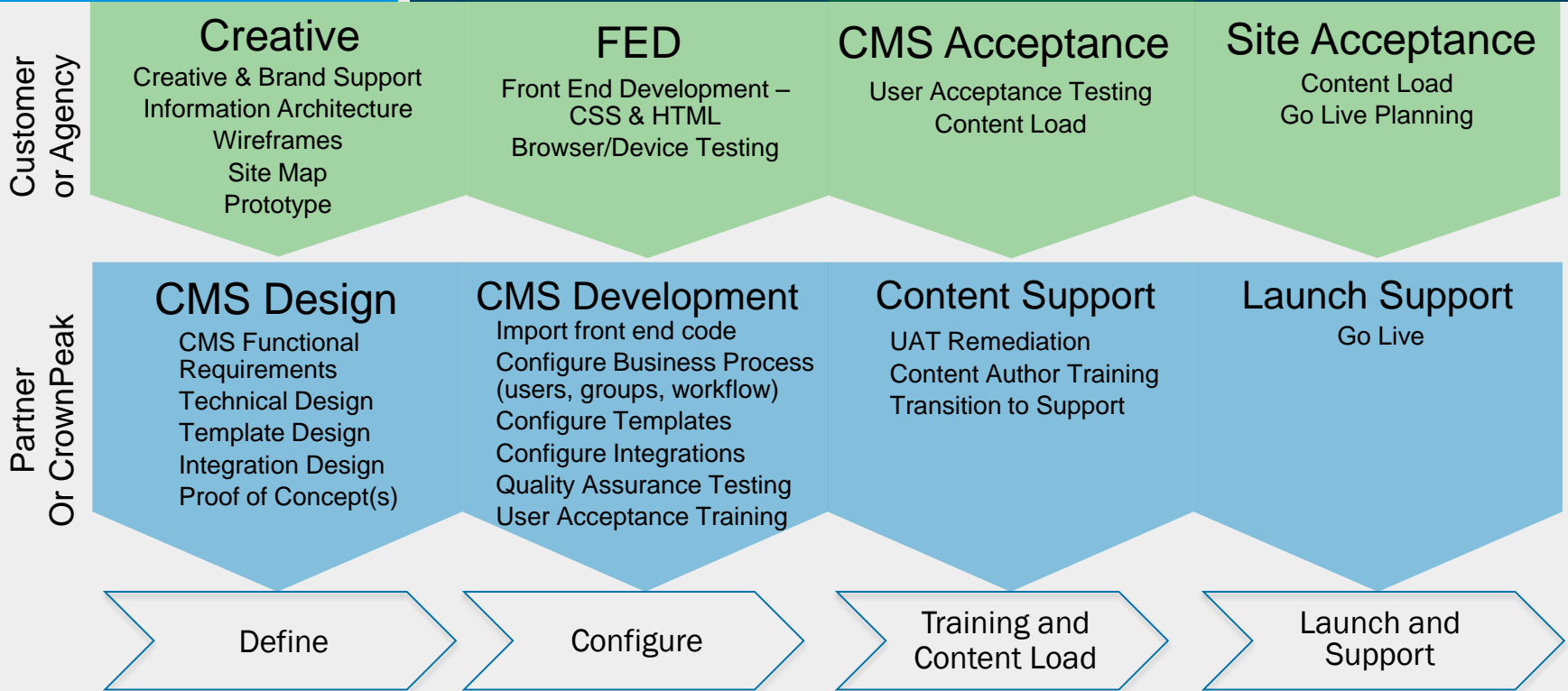
- ✓ Partner program and business development
 - Cameron Lim – cameron.lim@crowpeak.com

QUESTIONS?

PROJECT MILESTONES

- ✓ Milestones, audits and reviews
 - ✓ Best practices for each
 - ✓ Requirements to move to next milestone
 - ✓ Requirements for certification

CMS PROJECT OVERVIEW



DEFINITION

Milestone	Review/Meetings	Requirements for Certification & Next Step	Best Practices
Creative and Front end development		Annotated Wireframes Sitemap	Complete front end code.

DEFINITION

Milestone	Review/Meetings	Requirements for Next Milestone	Best Practices
Kickoff & Design	CMS Kickoff	<ul style="list-style-type: none">• Project Information document including<ul style="list-style-type: none">• Functional reqs• Technical Design• Hosting reqs• Configuration reqs• Thoroughly tested front end code.	

CONFIGURATION

Milestone	Review/Meetings	Requirements for Next Milestone	Best Practices
Development mid-point	Architectural review	Issues resolved	Plan for outstanding issues is in place

CONFIGURATION

Milestone	Review/Meetings	Requirements for Next Milestone	Best Practices
Implementation Delivery	<ul style="list-style-type: none">•UAT walkthrough	<ul style="list-style-type: none">•UAT documentation•UAT Issues resolved	<p>Plan for outstanding issues is in place</p> <p>During UAT, the implementation team is expected to rapidly address issues, bugs, and feature requests so customer can continue to test</p> <p>UAT is normally limited to about 2 weeks.</p>

TRAINING AND CONTENT LOAD

Milestone	Review/Meetings	Requirements for Next Milestone	Best Practices
Training & Content Load	<ul style="list-style-type: none">• End User & Developer Training	Site Content Load	

LAUNCH AND SUPPORT

Milestone	Review/Meetings	Requirements for Next Milestone	Best Practices
Site launch	Go live planning meeting	<ul style="list-style-type: none">• Go Live Checklist• Transition to Support (with CrownPeak)• Welcome to support (with Customer)	<ul style="list-style-type: none">• Go Live Checklist• Application support documentation

LAUNCH AND SUPPORT

Milestone	Review/Meetings	Requirements for Next Milestone	Best Practices
Post Launch Support	<ul style="list-style-type: none">• Transition to Support Meeting• Welcome to Support Meeting		

REQUIRED FOR CERTIFICATION

- ✓ PID (Project Information Document)
- ✓ Remediated Architectural Review
- ✓ UAT Training Document
- ✓ Welcome to Support Document
 - For customer
- ✓ Support Transition Document
 - For CrownPeak Support

QUESTIONS?

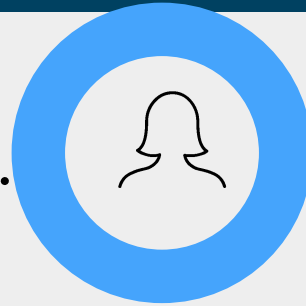
BEST PRACTICES AND QUICK START TOOLS

BEST PRACTICE AND QUICK START TOOLS

- ✓ Site builder for a quick start
- ✓ Projects Creation tool for multiple development teams
- ✓ Reference guides and articles on Connect

SITE BUILDER

CONTENT TYPES BY USER



Content Authors

- Articles / Blog Posts
- News / Press Releases
- Products
- Site Sections
- Site Locales

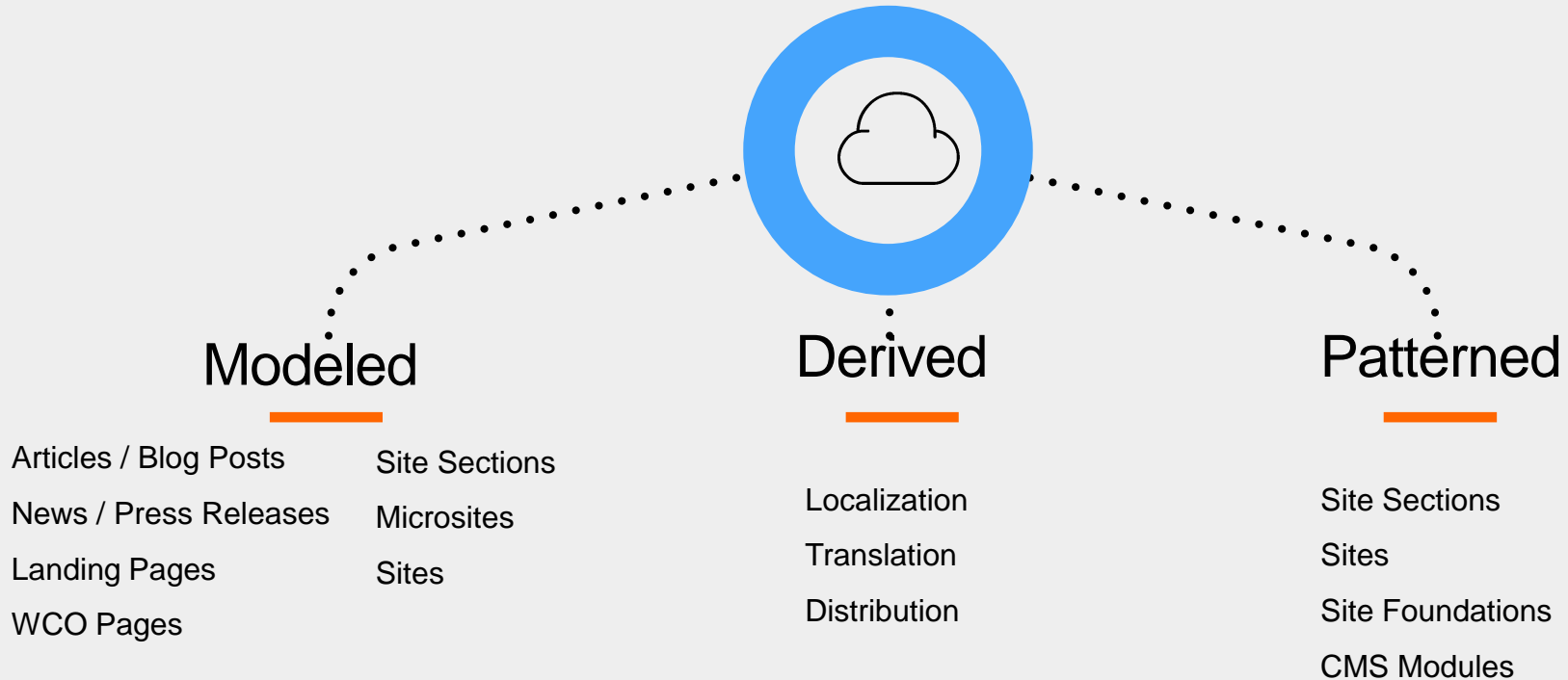
Marketers

- Landing Pages
- Microsites
- Pages with Forms
- Pages with Testing Snippets
- Pages with Targeting
- Snippets

Developers

- Content Types
- Site Sections
- Site Locales
- Sites
- Site Foundations (folders and templates)
- CMS Modules

CONTENT CREATION OPTIONS



Patterned Content is similar to Modeled Content, however...

1. Patterned assets are completely independent from their original source, and are allowed to change without impact of source content.
2. Site admins are able to create new standalone sites or site foundations, allowing the sites to completely diverge independently from the source pattern, and ensures a consistent and approved site structure, and authoring experience.
3. The action of creating content from patterns requires a Deep Cloning process where assets are cloned along with their templates (as well as models and folder structure).

PATTERNED CONTENT

Patterns are...

Patterns can be created, and setup by CrownPeak Support, of any configuration

1. A fully configured Site
2. A site skeleton with or without initial content
3. A site skeleton with or without look and feel

Introducing The Site Builder

1. The Site Builder is a CMS Configuration
2. Allows site administrators and developers to quickly and rapidly setup and create complete sites from approved Site Patterns that adhere to CrownPeak Best Practices.
3. The Site Builder offers a number of configurable options
4. Technology: .NET (aspx and MVC), PHP, and JSP
5. Site Configuration: Single Site, Collection of Related Sites, or TMF-Managed Sites
6. Modules: Release Management, Blogs, Metadata Management as optional CMS extensions that are automatically configured and ready to go. More modules (extensions) to be added regularly.

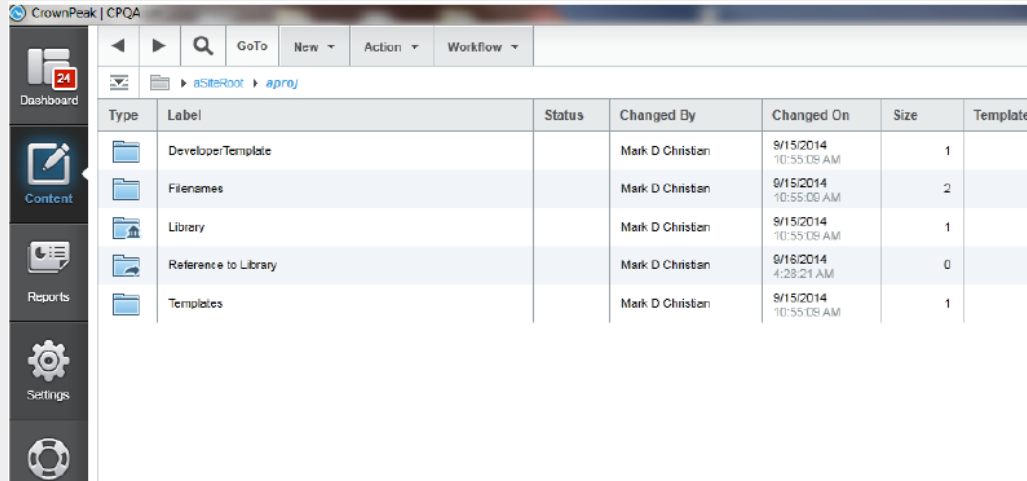
Benefits of The Site Builder

1. Rapid content creation of complex content patterns
2. Adherence to CrownPeak Best Practices
 - a. Proper Folder Structure
 - b. Properly named foundational Templates, Models and Assets
 - c. Ability to easily and quickly add CrownPeak CMS Extensions to Site Configurations
3. No coding required to setup and configure complete sites based on approved patterns



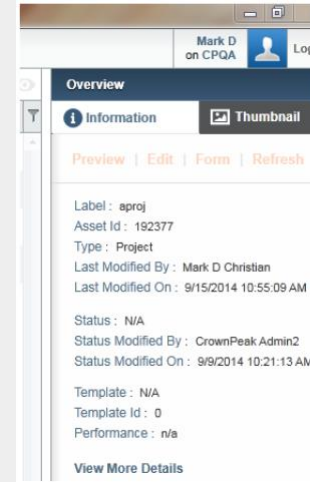
PROJECT CREATION TOOL

For separation of environments



The screenshot shows the CrownPeak CPQA interface with a sidebar on the left containing 'Dashboard', 'Content', 'Reports', and 'Settings'. The main area displays a table of files and folders under the path 'aSiteRoot > aproj'.

Type	Label	Status	Changed By	Changed On	Size	Template
Folder	DeveloperTemplate		Mark D Christen	9/15/2014 10:55:09 AM	1	
Folder	FileNames		Mark D Christen	9/15/2014 10:55:09 AM	2	
Folder	Library		Mark D Christen	9/15/2014 10:55:09 AM	1	
Folder	Reference to Library		Mark D Christen	9/16/2014 4:28:21 AM	0	
Folder	Templates		Mark D Christen	9/15/2014 10:55:09 AM	1	



The screenshot shows the 'Overview' page for a project. The user 'Mark D on CPQA' is logged in. The page has tabs for 'Information' and 'Thumbnail'. Below the tabs are links for 'Preview', 'Edit', 'Form', and 'Refresh'. The project details are as follows:

Label : aproj
Asset Id : 192377
Type : Project
Last Modified By : Mark D Christen
Last Modified On : 9/15/2014 10:55:09 AM

Status : N/A
Status Modified By : CrownPeak Admin2
Status Modified On : 9/9/2014 10:21:13 AM

Template : N/A
Template Id : 0
Performance : n/a

[View More Details](#)

Demonstration Highlights

- New screens to create projects
- Review of directory structure and separate libraries

CONNECT RESOURCES

RESOURCES BY MILESTONE

Milestone	Connect Resource
Creative and Front end development	<u>HTML Delivery Requirements</u> <u>Release Notes</u> <u>Sample Implementations</u>
Kickoff & Design	<u>Human Interaction Guidelines</u> <u>PID Template</u> <u>PID Sample</u> <u>Project Certification Checklist</u>
Development mid-point	<u>API Documentation</u> <u>Integration playbooks</u> <u>Dynamic Sites playbooks</u> <u>CrownPeak platform and features playbooks</u>

RESOURCES BY MILESTONE

Milestone	Connect Resource
Implementation Delivery	<u>UAT Document Template</u>
Training & Content Load	<u>End User Training Slides</u>
Site launch	<u>Go Live Checklist</u> <u>Transition to Support Template</u> <u>Welcome to Support Template</u>

QUESTIONS?

CREATE PID (PROJECT INFORMATION DOCUMENT)

CREATE PID

- ✓ Review PID Content
- ✓ Create PID for your first project

SAMPLE PID

Thank You for Participating



- ✓ Slides and Video of Presentation
- ✓ Questions
 - training@crowpeak.com
- ✓ Feedback
- ✓ Follow us on Twitter for latest updates on Connect
 - @CrownPeakHelp