



CrownPeak Platform Dashboard Playbook

Version 1.0

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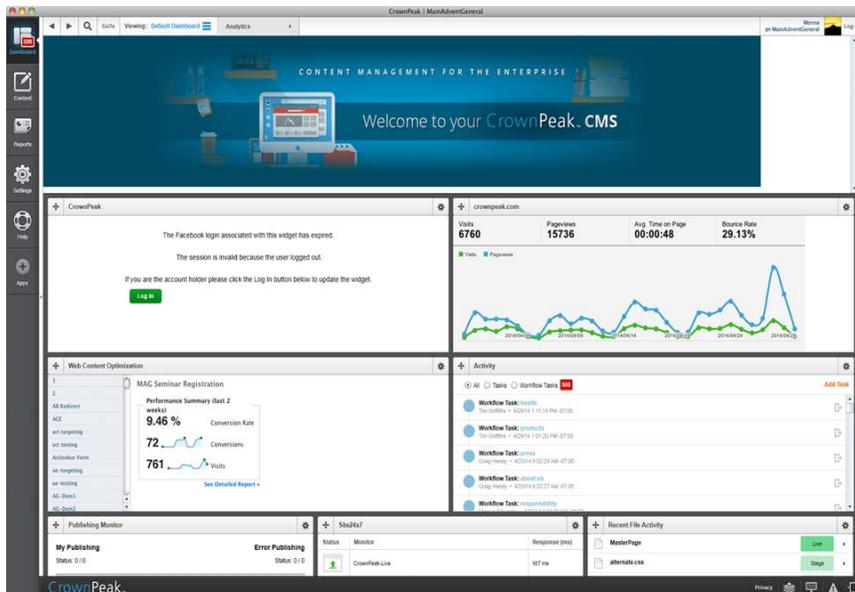
CrownPeak Platform Dashboard Overview

The CrownPeak Platform Dashboard provides users with easy access to CrownPeak Platform performance information, activities, analytics, and tools. Users benefit from high-level views of system functions, as well as direct links to make changes quickly and efficiently. The Dashboard is a user's default view of the system when they log in to the CrownPeak Platform unless preferences are configured otherwise.

Modules can be configured to monitor site integrations; lists and filters are available to isolate important sections of workload and modules. The Dashboard can be customized to meet any customer's business requirements.

Dashboard Benefits and Features

- Use links to monitor CrownPeak Platform performance and user activity
- Connect directly to the CrownPeak Platform Help module
- Create and see reports on issues such as errors, file activity, and workflow tasks
- Access to analytics and WCO or other CrownPeak Platform modules
- Navigate to previously edited content, common tools and modules, and other system features
- View and run reports on errors, files and workflow tasks
- Access the Help module directly
- Configure and access additional CrownPeak modules such as WCO, analytics and social media tools
- Customize private dashboards for individual user experiences, depending on the role of the user and business requirements
- Allow users to drag and drop, sort, and adjust the size of items on the dashboard to enhance their individual experience
- View all content management data and analytics in one place.
- Gain insights into your marketing content and performance
- See a unified view of marketing content performance and customer engagement
- Configure flexible widgets to include any metric, content or data source



CrownPeak Platform Dashboard Configuration

Business Process as a Guide

The CrownPeak Platform Dashboard can be configured to support many different business processes. Before starting configuration, it's useful to identify the scope of business requirements.

Pertinent questions to consider as a client include the following:

- Would you like users to have quick access to such common features as
 - CrownPeak Platform Help
 - Publishing errors
 - Workflow tasks
 - Recently edited files
- Would you like to leverage the CrownPeak Platform's reports to audit publishing and user activity?
- Do you anticipate adding modules such as WCO, Salesforce, Google Analytics, etc., and want a central and intuitive area to access them?
- What else would you like to see?

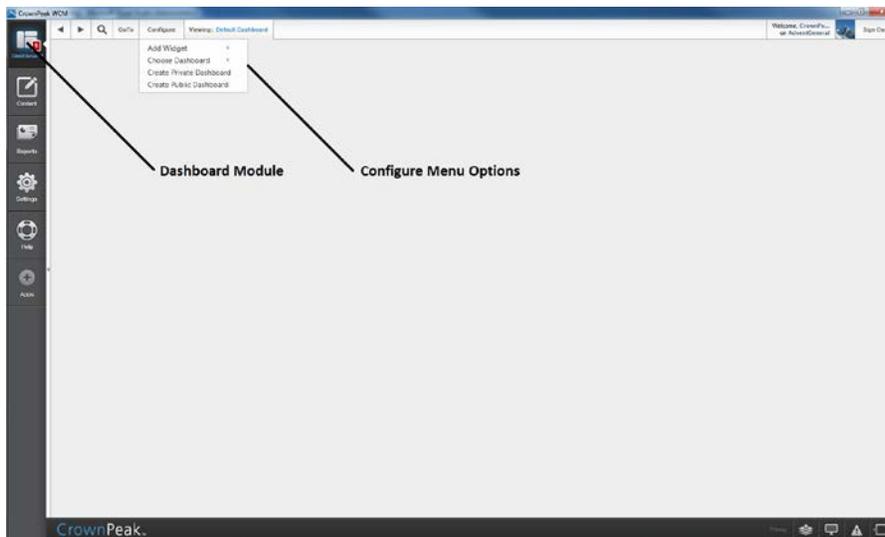
Once underlying business processes are understood, CrownPeak can take the initial steps required to enable the Dashboard in a CrownPeak Platform instance. After initial setup handled internally by CrownPeak, Dashboard configuration can proceed through the steps that follow.

Creating a Dashboard

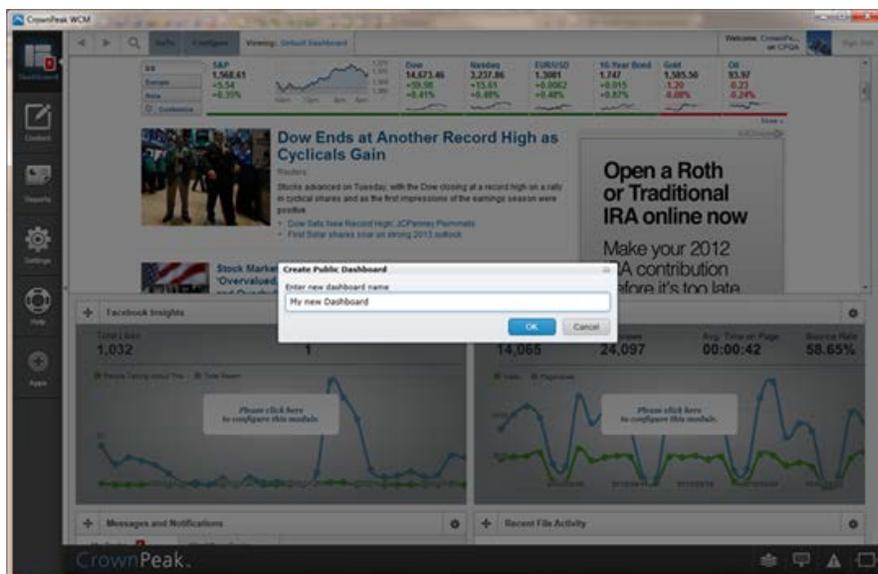
By default any user has the right to create a private or a public dashboard. As a system administrator you might need to create one or more public dashboards other than the default_dashboard created internally by CrownPeak. There are two ways you can do this.

Creating a Dashboard from the Dashboard Module

1. From the Configure drop-down menu in the Dashboard module, any user can choose to create a public or a private dashboard.



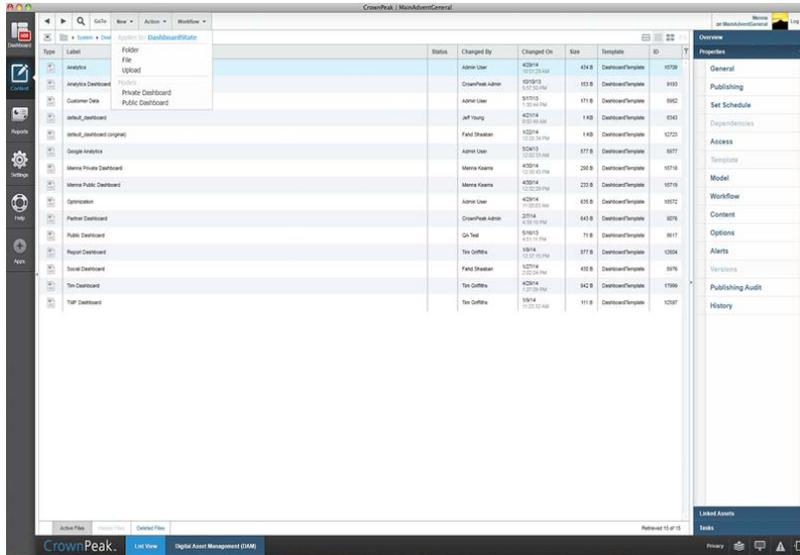
2. When the user chooses between public and private, they'll be prompted to enter a name for the new dashboard.



3. After the user clicks OK to confirm the name they've chosen, a new dashboard will be created and will have that user as Owner. The new dashboard will have no widgets when first created.

Creating a Dashboard from the Content Module

1. Every dashboard is represented by an asset in the /System/Dashboard/DashboardState folder. A user can choose to go directly to the /System/Dashboard/DashboardState folder and add a new private or public dashboard using the New menu.



2. **Please note:** Adding a dashboard using this method does not assign a dashboard Owner. As a result the new dashboard will inherit asset security from the corresponding asset in /System/Model/Basis/DashboardModel folder. This could result in inaccessible assets. Only use this method if you fully understand the security structure and settings of the model assets as configured by CrownPeak during initial setup.

Editing a Dashboard

In order to edit a dashboard in the CrownPeak Platform, a user must either have Edit rights for the specific dashboard asset or be the Owner of the dashboard (see Additional Notes for an explanation of the concept of Owner in the CrownPeak Platform).

Using the Dashboard Module To Edit

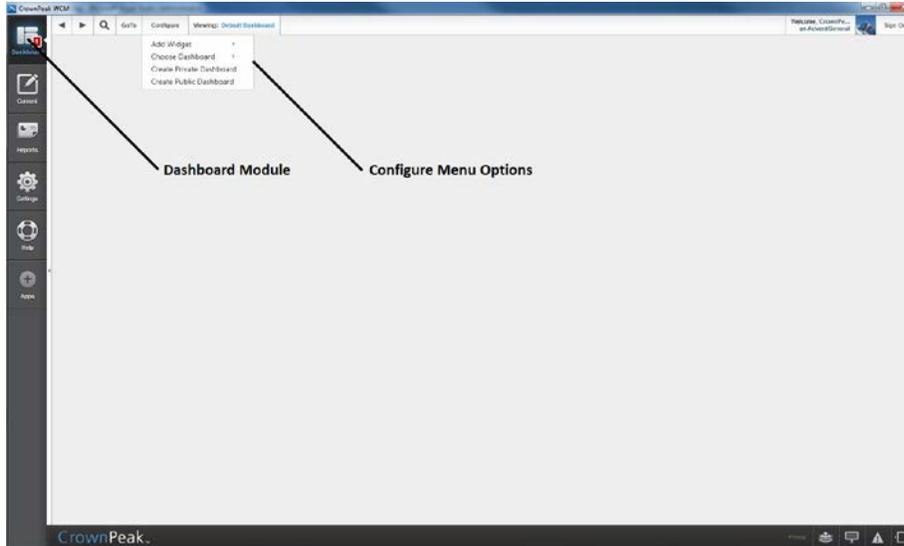
Editing a Dashboard asset through the Dashboard module interface is the most intuitive and easy to use method at this time. Through the configure menu at the top of the module a user can:

- Select which dashboard to view or edit
- Add Widgets to a dashboard
- Create a new public or private dashboard

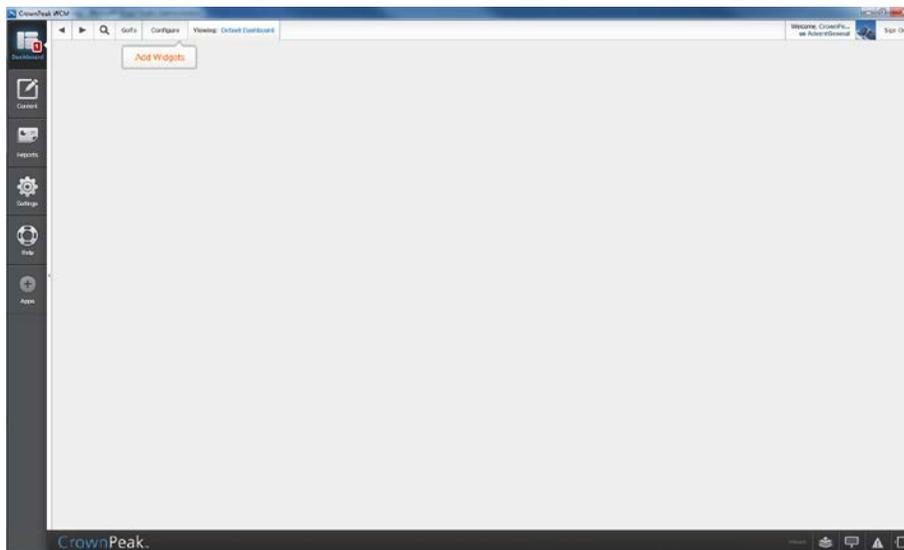
1. Open the Dashboard module and select a dashboard that you have permission to edit from the Configure menu. If there are no dashboards listed under the Choose Dashboard menu option, then you first need to create a new

dashboard (see above). By default once a user creates a dashboard, that user becomes the owner of that dashboard and will always be able to edit it.

2. **Please note:** The presence of a dashboard in the Choose Dashboard menu does not indicate that a user has the ability to edit that dashboard. This is only a list of all dashboards the user can view.



3. Once a user selects a dashboard to edit, they can begin adding widgets to the dashboard by selecting Add Widgets from the Configure menu. If there are no widgets listed under the Add Widget menu option, please see the section below on "Configuring Widgets.""



4. Adding widgets to a dashboard will add them at the bottom of the dashboard by default. To reorder dashboard widgets, a user can click and hold the four arrows in the top left corner of a widget to enable the drag and drop feature.

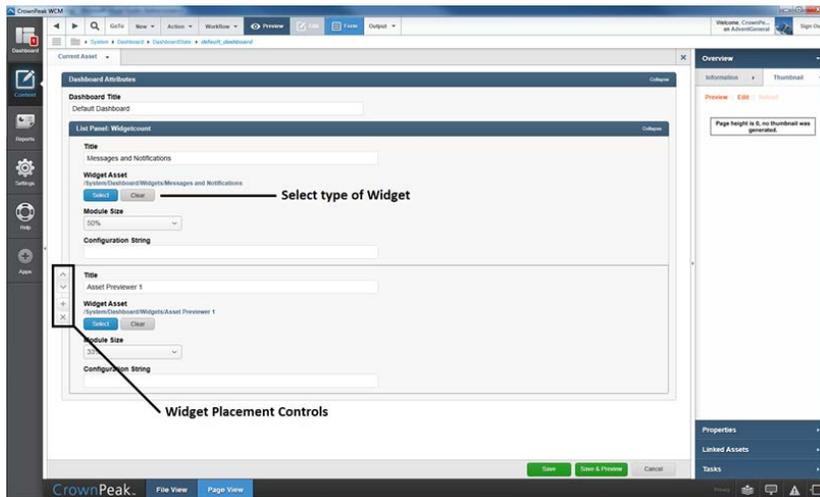
5. Clicking on a widget's gear icon will toggle basic widget settings, allowing the user to change the size of a widget or remove a widget from the current dashboard. (Custom widgets may require additional configuration which will be discussed below in the "Configuring Widgets" section of this document.)

6. When done editing a dashboard, the user may click on the Save icon. This can be found at the top of the dashboard module to the right of the name of the dashboard currently being edited.

Using a Dashboard's Template To Edit

Each Dashboard has a corresponding asset located in the /System/Dashboard/DashboardState folder. From this folder users can select an existing dashboard asset and edit it using its template. This method is useful for making edits to the Default Dashboard before enabling it and making it visible to everyone.

1. To begin editing a Dashboard asset, right click on the asset and select Edit from the context menu.
2. Using the template a user has all the same functionality available using the dashboard module.



3. Expanding the list panel "Widgetcount" gives a user access to the list of widgets currently on the dashboard.
4. Using widget placement controls, a user can change the order of widgets on the dashboard, as well as add widgets to or remove them from the dashboard.
5. Each entry in the panel represents a widget on the dashboard. Users are able to modify a widget's title, size, configuration string, and type.
6. Using the acquire document control for the widget, a user is able to select an asset from the /System/Dashboard/Widgets folder corresponding to the type of widget they want to add.
7. When done editing a dashboard, the user should select the Save button to commit changes.

Configuring Widgets

Upon initial installation, Default Dashboard will contain a Banner widget, Activity widget, Publishing Monitor widget, Recent File Activity widget, Site24x7 widget, Errors widget, and a Help widget (in this order). Clients can request the default order be modified for initial installation.

After installation, your Dashboard experience can also be customized.

Creating a Widget

1. To create a widget, navigate to the `/System/Dashboard/Widgets` folder.
2. Use the New menu to select the type of widget you would like to create.
3. By default the widget's asset name will be used as the display name in the Add Widget submenu within the dashboard Configure menu.
4. To override a widget's default size and title, edit the Content Properties of the widget asset.
5. **Please note:** Editing Content fields will only affect widget assets added to dashboards after the edits take place. It will have no effect on existing dashboards using this widget. To change the behavior of a widget already placed on a dashboard please refer to the previous section, "Editing a Dashboard."

Types of Widgets

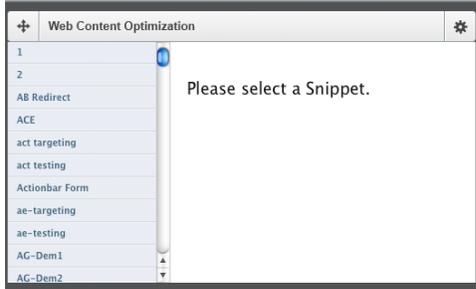
There are two types of widgets, Basic and Custom. This section includes lists of both types of widgets, as well as information about how to configure and use them.

Basic Widgets

Basic widgets only use the basic settings available to them (shown when the gear icon in the upper-right corner of a widget is clicked). This is limited to the size of the widget and an X to remove the widget from a dashboard. Basic widgets include:

1. **Errors:** Shows a quick error report
2. **Help:** Shows a list of helpful links
3. **Activity:** Shows a tabbed view of current tasks and workflow tasks assigned to the user
4. **Recent File Activity:** Shows the last 50 modified assets on the instance

5. **WCO**: Shows the WCO module for the current instance



6. **Publishing Monitor**: Shows a brief overview of the publishing activity on the CrownPeak Platform by the current user

Custom Widgets

Custom widgets have their own distinct settings that need to be configured before they can be used. After initial widget configuration, the gear icon will reveal not just size and remove widget options, but additional settings specific to each widget. Custom widgets include:

1. **Asset Previewer**: This widget allows the user to display a URL in an iFrame-like widget or preview an asset from the current instance in a similar way.

A. To configure this widget for the first time, follow these steps.

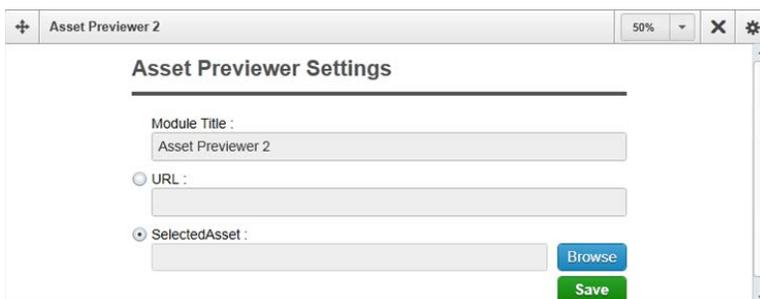
B. Click on the placeholder image to show settings.

C. To edit the URL or asset of the widget, select the gear icon in the top right of the widget.

D. Select the URL radio button and type a valid URL into the box to the right. URLs will default to http if not specified otherwise.

E. Alternatively, select the Browse button to open an Asset Picker dialog box. You can use this to select the asset you would like to preview in the widget.

F. Click the Save button to confirm your changes.



2. **Banner**: The Banner widget is identical to Asset Previewer, except that it is always full width and cannot be removed by the end user (it has no top bar). This widget is most often placed at the top of the dashboard for announcements. It can be removed using the using the dashboard template editing method discussed above.

3. **Site24x7**: This widget first requires a Site24x7 connector to be setup via the Settings->Configuration->Connectors interface.



Once the connector has been created, the widget can be configured.

The connected accounts area serves as the central location to connect many popular social services directly to the CMS. Connecting the social service throughout the CMS for a better experience.

Connect Site24x7 Account

Please enter your Site24x7 API key below.

Connector Name API Key

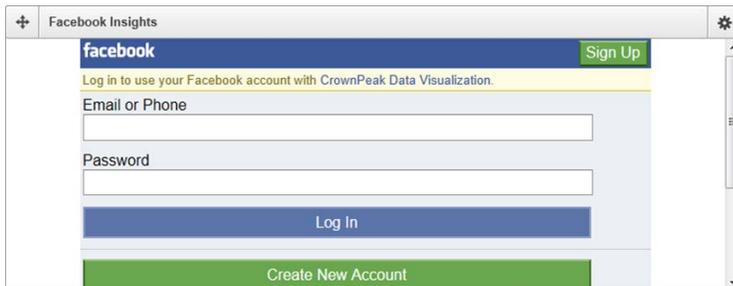
Widget settings allow you to select one Site24x7 connector to monitor, as well as to select a time interval to poll data from site24x7. Send a ticket into CrownPeak Help/JIRA to get the correct API Key.



4. **Demandbase:** This widget can be configured to display a Demandbase report as retrieved from Google Analytics. The setup process is identical to the Google Analytics widget (see item 6 below).

5. **Facebook Insights:** This widget can be configured with a Facebook account to display the Insights report for a Facebook page.

A. If this is the first time configuring the widget, click on the placeholder. The user should be directed to a Facebook login screen. Enter the Facebook credentials for the account here.



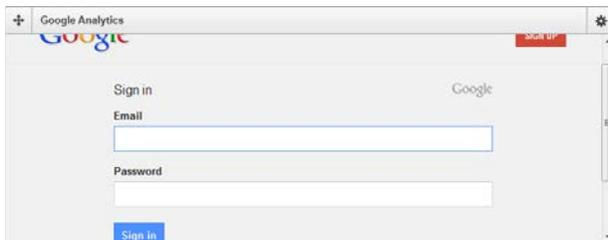
B. After logging in, the user will be shown a series of Access prompts that are required in order for the CrownPeak Platform to gather information from your account and generate the widget data.



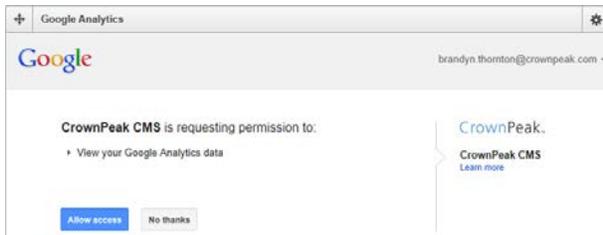
C. Click OK to allow CrownPeak to access your public profile data. After the user has confirmed every request, the widget will be configured.

6. Google Analytics

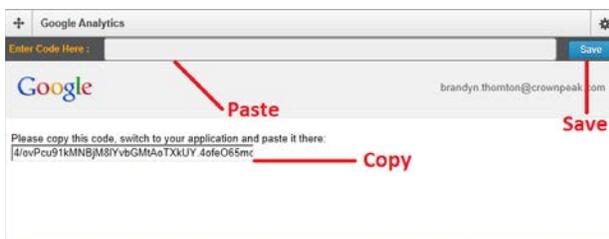
A. If this is the first time configuring the widget, click on the placeholder. The user should be directed to a Google login screen. Enter Google credentials for the account here.



B. After logging in the user will be shown a series of Access prompts required for CrownPeak to gather information from the Google Analytics account and generate widget data. The user should allow access at each prompt.



C. The next step will ask the user to copy a code from the widget browser into a text box at the top of the widget. After this is complete, click the Save button to continue.



D. The user is then taken to a screen with a list of Google Analytics accounts available for use with this widget. If there is only one account available, it will autoselect that account. Once a preferred account has been chosen, click the Save button to render the widget.



Troubleshooting

Reset a Widget

1. In order to reset a widget, the associated dashboard asset will need to be modified directly using the template method covered above ("Using a Dashboard's Template To Edit").
2. The Configuration String field for the widget in question should be deleted.
3. If the widget is listed in the Basic Widget list above, then refreshing the dashboard will also reload the widget. If this is a Custom widget and the settings have become corrupt or are no longer valid, then the user will need to restart its initial configuration process so new credentials can be generated.

Remove a Dashboard

1. To remove a Dashboard from the CrownPeak Platform, use the Configure menu to select the desired dashboard.
2. After selecting the dashboard, click on the delete icon (a trash can) on the top bar.
3. A user can also delete dashboards from the Content module by navigating to `/System/Dashboard/DashboardState/` and deleting the corresponding asset in the folder. (If the Dashboard is private, the owner of the Dashboard will be required to perform the action.)

Using the CrownPeak Platform Dashboard

Once dashboard configuration is complete, CrownPeak will conduct user training as part of User Acceptance Testing (UAT). CrownPeak will review the dashboard in the context of business process requirements, confirming proper operations for:

- Accessing the customized Help module
- Monitoring CrownPeak Platform activities and tasks
- Using additional integrations and connectors

Any issues discovered or additional changes requested will be processed as a part of the final configuration tuning. Once User Acceptance Testing is completed, the configuration project will end and ongoing operations will be supported by CrownPeak's Absolute Service team.

Notes and Additional Information

Implementation Guidelines

In general, a CrownPeak Platform Dashboard project takes about 24-40 hours to configure from a business process specification. Gathering business requirements may take as much as 16 hours, depending on required documentation levels. UAT and tuning the configuration may add 16 hours to an existing UAT, or may require 24 hours for a standalone configuration (e.g., 8 hours of training, 16 hours of support across a 5 day UAT window).

Playbook References

CrownPeak Playbook – Dashboard Internal (URL TK)