



# CrownPeak

WEB EXPERIENCE MANAGEMENT

## Enablement Sample Site

Project Information Document

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## CrownPeak Project Information

This document is a tool to document configuration information vital to the Client CrownPeak implementation. Below you will find an introduction to some key CMS concepts, as well as requirements gathered during Kickoff meetings. The information collected relates to these main concepts.

### Scope

This is a detailed review of the scope of the project. This is a listing of the features and functions that will be implemented as defined in the kickoff meetings.

Site Map and Functionality: This is a review of the architecture and functionality of the site being published by the CMS. Reviewing this will highlight missing items that should be within the project scope.

### Hosting

Review DNS configuration and monitoring requirements.

### Folder Architecture

This defines the structure of the CMS implementation. The recommended architecture enables all users to access to their content and enables administrators to control access as needed.

Templates: Details on the templates and fields for input.

Models: Details of the end user configuration.

Content Plan: Define how the content will be added into CMS.

CrownPeak Modules: Define integrations with the CMS and other CrownPeak products – WCO, Search, Hosting.

### Groups/Roles

This defines the types of users that are in your system (Authors, Editors, Administrators, etc.)

### Workflow

This defines the path your documents take from creation to publishing on your live site is defined.

### Users

With the Groups and Workflow defined, you can determine who the users of your CMS will be and what group(s) they will belong to.

### Communications

This defines contact and escalation during implementation

### Roles and Responsibilities

Identify points of contact and team members for the implementation.

Please note that all of this information is required to complete the implementation of your CMS.

## Scope

Define the implementation scope

- Number of sites: 1 site
- Phase I Number of templates: 6 page templates, 1 nav-wrap, 2 config, 2 widgets
- Phase II Number of templates: 3 page templates
- CrownPeak Products & Services: CMS, Hosting, WCO, Search, TMF, Blog, Release Management
- User Groups: *Author, Editor, Admin*
- Workflow: Basic Workflow + Dev
- States: Draft, Rejected, Pending, Dev, Stage, Live, Retired, Archived, Deleted
- Third Party Implementations: Google Analytic, CP analytic, RSS, and sitemap
- Content: Build sample contents as needed to demonstrate site functionality.

## Site Map and Functionality

List front-end code files (HTML, CSS, JavaScript), site map, and content migration plan received from customer and/or partners. Wireframes and functional documentation is useful, but not required.

Required Documents	Description
Site Map	Flowchart of site structure. It should be based on navigation and information architecture in the User Experience document.  Appendix I
Front-End Files	This is the most important deliverable to start a CMS engagement - a complete and tested site should be delivered to CrownPeak  This deliverable must include code for all layouts and functionality for all page types. This includes: <ul style="list-style-type: none"> <li>• The layout code (XHTML, XSL, XML, CSS)</li> <li>• Images and media</li> <li>• Any client-side scripts required for functionality as described by the strategy, user experience or functional requirement documentation</li> <li>• Any server-side code required for functionality on the site</li> </ul>
Content Migration Plan	Since this is a sample site, content will be created as we create sample pages.

Optional Document	Description
Strategy	<p>The Sample Pharmaceutical Site is an updated sample and best practices site for implementing CrownPeak CMS.</p> <p>The initial version will develop the core site. Later phases will add and demonstrate new features and functionality.</p>
Functional Requirements Documentation	<p>Disqus for comments.</p> <p>WCO Contact form integration</p> <p>Initial version of site will publish as .aspx but will be flat HTML.</p> <p>Future phases will implement the site with a masterpage architecture, an MVC architecture and a php architecture.</p> <p>Consider a JSP architecture if JSP will need supported in the future...</p> <p>Ideally, templates will take advantage of multiple outputs rather than having separate code bases for the additional platforms.</p> <p>Additional integration demonstration as required.</p> <ul style="list-style-type: none"> <li>• Salesforce</li> <li>• Marketo</li> <li>• ExactTarget</li> <li>• Veeva</li> <li>• Epsilon</li> </ul>
User Experience	<p>Site templates should demonstrate a best practice user experience in Volte. With well laid-out panels, SEO controls, WYSIWYG CSS integration and templates should implement consistent functionality from library methods where possible</p> <p>Implement New and copy files as well as preview files to demonstrate their correct use in managing assets based on models</p>
Site Statistics	<p>Information on existing site to determine type of hosting to recommend. It must include: traffic, number of pages, bandwidth and disk space requirements and security standards. This information should come from your IT department.</p>

## Sites

List all URLs CrownPeak will publish to

- Temporary Site URL
- Live <http://mtlive.cp-access.com/Sample-Pharma/>
- Stage: <http://mtistage.cp-access.com/Sample-Pharma/>
- Dev: <http://mtidev.cp-access.com/Sample-Pharma/>
- Name of CMS: MasterTrainingInstance
- Volte: <http://wcmdemo.crownpeak.com/MasterTrainingInstance/UI/>
- Classic: <http://wcmdemo.crownpeak.com/MasterTrainingInstance>

## Hosting

Define DNS and monitoring requirements for the sites above. These requirements will be approved by CrownPeak IT Operations

### *Server requirements*

.NET version .Net 4.0 is assumed, MVC .NET, PHP

### *Plan for public DNS Configuration*

Will contact CrownPeak IT and CrownPeak Support to coordinate steps to launch

### *Requirements availability monitors*

Site homepage should be monitored for outages

Integration with Disqus should be monitored

### *Distribution list for reports*

training@crownpeak.com

## Folder Architecture

/Global/ [This is a folder that will hold digital assets like image, pdf s, css, etc. This lives outside of the /Site folder so it can be virtualized on publishing and used by all the sites managed in CrownPeak]

/Global Configuration/

/Volte-Pharmaceutical/

/Assets/

    /css

    /fonts

    /images

    /js

    /type

    /widgets

/Site Configuration

    /Widgets

/About

/Contact

/Products

/Press

/Press Releases

/Responsibility

/Health

/Research



## Templates

Pages types identified from the front-end files are converted into templates. List the templates to be developed below. Template specifications should global, page and widget templates. For each template, include fields and input type.

### Notes

Template will work together so templates should reuse features, code using the library and interface elements for similar site functionality.

Consider the user of each template. Does the recommendation below support their requirements for content entry and their technical knowledge in order to update content? For example, are they power users or technical novices? This information should change your approach to input fields in the templates.

### Contact Page

- Summary content
- Map (Google)
- Two column contact info
- Feedback form (WCO)
- (This template will be used to create/manage contents for contact pages). Contact Page uses WCO for contact form.

Field Name	Field Type	Notes/Components
<b>Top Content</b>		
Header	Text	Page title and Asset Label.
Content	Wysiwyg	Page description that displays below the Header.
<b>Center Content</b>	List Panel	List of messages like FAQ, Email Us, Call Us, etc
Icon	Dropdown	List of icons that displays on the left side of each message, like Bulb, Email, and Phone icons
Content	Wysiwyg	
<b>Side Panel</b>	List Panel	This is like a widget that applies only for this page.
Side Panel Type	Select Dropdown	Types for format you want to add.

Field Name	Field Type	Notes/Components
<b>Side Panel Type (Misc)</b>		
Header	Text	
Content	Wysiwyg	
<b>Side Panel Type (Contact)</b>		
Header	Text	
Content	Wysiwyg	
Address 1	Text	
City	Text	
Zip	Text	
Country	Text	
Phone	Text	
E-mail	Text	
<b>Meta</b>	Standard Panel	

### Content Page

(2 versions produced – Content Page – Basic and Content Page – Categories and Tags) Used for Products and Press Releases

- Article Header
- Hero Image
- Sidebar with search & related content & categories
- Tags – related contents
- Previews of related post pages
- Comment section driven by Disqus
- Testimonial slide show (content in section config)

Field Name	Field Type	Notes/Components
<b>Content Header</b>		
Page Label	Text	
Page Title	Text	
Author	AutoComplete	Built from Author assets
Post Date	Calendar	Drop-downs for time, reformatted in post input as a single datetime field.
Page Description	Text	
<b>Main</b>		
Top Image	Image select / Upload	
Img Alt	Text	
Body Text	Wysiwyg	
<b>Related</b>	List Panel	
Target	Dropdown	
Related Document	Select Document / Upload	
<b>Side Panels</b>	List Panel	
Header	Text	
Text	Wysiwyg	
<b>Right Rail</b>		
Use Right Rail from Section Config?	Checkbox	If checked, right rail widgets from section config rendered on top of page widgets

Field Name	Field Type	Notes/Components
Right Rail Panel		List Panel: Title, Right Rail Options: None, Simple Content (wysiwyg), Search (displays search box), Categories (displays list of categories and quantity of articles in them, and links to category indeces), Tags (displays list of tags with links to tag index pages)
Meta		Standard panel

### Home Page

- Hero Banner
- Information Panel
- Featured Press Releases
- Bottom Image
- Testimonial slide show

Field Name	Field Type	Notes/Components
Hero Banner		
Image Header	Text	
Image Sub-Header	Text	
Parallax Background	Image select / upload	

Field Name	Field Type	Notes/Components
<b>Information Panel</b>	List Panel	
Header Content	Text	
Paragraph Content	Wysiwyg	
Link Panel	Added Link Panel	Driven by ServicesShowHyperLink
<b>Press Pannel</b>		
Press Folder	Document select	Select press releases folder, template looks for most recent three in output and displays their summaries.
<b>Bottom Banner</b>		
Image Header	Text	
Image Sub-Header	Text	
Parallax Background	Image select / upload	
<b>Meta</b>	Standard panel	

### Nav Wrap

- Output.aspx only, takes content from Site Config for display
- Uses RenderHyperLinkList to generate top navigation.
- Sorted Index Page (Used for Press Release and Product Index pages)
- Summary content
- 3 column index of products post
- Paginated

- Testimonial slide show

Field Name	Field Type	Notes/Components
<b>Top Content</b>		TAB
Page Label	Text	
Page Title	Text	
Short Title	Text	
Page Description	Text Area	
<b>Sorting Options</b>		TAB
Sort By	Dropdown Options: Date, Alphabet	
Order BY	Dropdown, options: Ascending, Descending	
Items per Page	Dropdown, options: 3,6,9,12	Divisible by 3 b/c of page layout. Uses CMSAPI panel pagination
Product Folder		
<b>Meta</b>	Standard Panel	

### Section Landing Page (Used for Responsibility, Health, Research and About Us pages)

- Summary content
- Two column content
- Banner
- Tabbed content

Field Name	Field Type	Notes/Components
<b>Upper Content</b>		TAB
Page Label	Text	
Page Title	Text	

Field Name	Field Type	Notes/Components
Short Title	Text	
Upper	List Panel	
Content Type	List Panel	
Content Type (Summary)	Dropdown select	
Header	Text	
Content	Wysiwyg	
Content Type (Two-Column)		
Header 1	Text	
Content 1	Wysiwyg	
Header 2	Text	
Content 2	Wysiwyg	
Content Type (Parallax)		
Parallax Header	Text	
Parallax Sub-Header	Text	
Parallax Background	Image select / upload	
<b>Tabbed Content</b>		TAB
Tabs	List Panel	
Tab Name	Text	
Tab Image	Image select / upload	
Alt Text	Text	
Tab Header	Text	
Tab Content	Wysiwyg	Includes CSS for creating custom list style

## Site Config

Field Name	Field Type	Notes/Components
<b>Logo</b>		TAB
Link Image	Image select / upload	
Alt Text	Text	
Target	Drowpdown	None, Bank, Top, Parent
Link Type	Drowndown selection	Internal, External
Select Document for Link Target	Document select	
<b>Menu</b>		TAB
Menu Items	List Panel	Uses ServicesInput.SH owHyperLink
Link Text	Text	
Target	Drowndown	
Link Type	Dropdown selection	Internal / External
Menu Items (Sub Menu Items)	List Panel	
Link Text	Text	
Target	Dropdown	
Link Type	Dropdown selection	Internal / External
<b>Footer</b>		TAB
Footer Widgets	List Panel	Max 3



Field Name	Field Type	Notes/Components
Select Footer Widget	Document Select	
Sub-Footer Content	Wysiwyg	
<b>Meta</b>	Standard Meta Panel – use to set defaults	TAB
<b>Analytics</b>		TAB
Google Account Number	Text	
CP Analytics Site ID	Text	
CP Analytics Site Key	Text	
Custom code	Text area for code	
<b>WYSIWYG Config</b>		
Stylesheet		Used to select css for wysiwyg editors
Preview Stylesheet		Css when viewing edit form before clicking editor

## Section Config

Utilized to set up defaults section widgets (right rail) and testimonial widgets

- Summary content
- Two column content
- Banner
- Tabbed content

Field Name	Field Type	Notes/Components
<b>Testimonials</b>		TAB
Testimonial Panel	ShowAcquireDocument	Use to select testimonials for section
<b>Right Rail</b>		TAB
Rightrail panel	Same as on content page, use to set default right rail for an entire section of content pages	

**Widgets***Footer One Third Widget*

Field Name	Field Type	Notes/Components
<b>Input Header</b>		
Page Label	Text	
Page Title	Text	
Short Title	Text	
One Third Widget Title	Text	
Main Content	Wysiwyg	
Check to add last css if last footer displayed	Checkbox	

*Subfooter Widget*

Field Name	Field Type	Notes/Components
Asset Name	Text	
SubFooter Widget Content	Wysiwyg	

*Testimonials*

Testimonials	List Panel	
Testimonial Quote	Text	
Author	Text	

## Repeated Fields

### Meta

Meta		
<b>HTML Title (in browser bar)</b>	Text	
<b>Page Meta Title</b>	Text	
<b>Page Meta Description</b>	Text	
<b>Page Meta Keywords</b>	Text	
	<b>Meta Input, Robots and Sitemap inputs use ServicesInput methods</b>	

ServicesInput, ServicesOutput, ServicesPostInput and ServicesUtil are used where possible to leverage new Services Library functionality.

ServicesInput.ShowHyperLink() is used when building 2-level nav and managing logo image link in Site Config/Nav Wrap

ServicesInput.ShowMetaInput, ServicesInput.ShowMetaRobotsInput, and ServicesInput.ShowSiteMapInput are used in most page template inputs.

ServicesInput.ShowInputHeader is used on several templates to create a consistent content field structure for the page titles and summary information.

ServicesOutput.RenderCSSLink() and ServicesOutput.RenderScriptLink() are used in nav wrap to link to css and javascript assets

Nav Wrap uses ServicesOutput.RenderHyperLinkList() to render 2-level main navigation

## Models

To configure the experience for the CMS end user, define the site models, their contents, and where and how they should be used.

### Note:

Models are applied to folders, and define the options in the New menu. Developers define the section and page types their users should be able to create, and configure models with the appropriate template, access properties and workflow to enable the feature.

Model Name	Asset Type	New Options	Applied to
<b>Asset</b>	Digital assets and developer templates	Asset Asset Folder  Note that css and js code files are currently created with new>file	/_Assets/
<b>Site Folder</b>	Top Level Site Folder	New Site Section	/SAMPLE Pharmaceutical/
<b>Site Section</b>	Folder and template asset options for building site pages and structure	Content Folder – Basic  Content Folder – Cats and Tags  Section Folder  Contact Page  Landing Page  Sorted Index Page	/SAMPLE Pharmaceutical/About/ /SAMPLE Pharmaceutical/Contact/ /SAMPLE Pharmaceutical/Press - Basic/ /SAMPLE Pharmaceutical/Press - Categories and Tags/ /SAMPLE Pharmaceutical/Products/ /SAMPLE Pharmaceutical/Responsibility/ /SAMPLE Pharmaceutical/Responsibility/Health/ /SAMPLE Pharmaceutical/Responsibility/Research/
<b>Authors</b>	Templated Asset	Author	/SAMPLE Pharmaceutical/Global/Authors/
<b>Categories</b>	Templated Asset	Category	/SAMPLE Pharmaceutical/Global/Categories/
<b>Tags</b>	Templated Asset	Tag	/SAMPLE Pharmaceutical/Global/Tags/
<b>Press or Products Folder - Basic</b>	Templated Asset	Content Page - Basic	/SAMPLE Pharmaceutical/Press - Basic/Press Releases/ /SAMPLE Pharmaceutical/Products/Product Details - Basic/

Model Name	Asset Type	New Options	Applied to
Press or Products Folder - Cats and Tags	Templated Asset	Content Page - Categories and Tags	/SAMPLE Pharmaceutical/Products/Product Details - Categories and Tags/ /SAMPLE Pharmaceutical/Press - Categories and Tags/Press Releases/

## Content Plan

There are three methods of content import. Identify which will be used for this project and list requirements.

### Load

Content will be added by CrownPeak users.

## CrownPeak Modules

These modules are available for additional functionality. Information on branchable assets and Translation model framework is required. List their requirements and requirements for other modules below.

### Digital Assets

Using new Digital Asset type that supports branching

### Translation Model Framework (TMF)

To be added on future examples

### WCO

Used for contact form

### Search

CrownPeak search used for standard site search

## Third Party Integrations

List 3<sup>rd</sup> party integrations and their requirements below

- Disqus - used for commenting engine
- API-level integration used for comment quantity on Content Pages and indices

TBD:

- Google Analytics?
- Social Media - Facebook, Twitter?
- Salesforce?
- Eloqua?
- Demandbase?

## Groups and Roles

Users are assigned to groups and groups have associated permissions. In the default implementation, for example, an Author group can create and edit their content, but don't have the ability to approve content or publish content to the live website.

Default access groups are listed below. If necessary, this should be updated with customer's required groups.

Group Name	Description
Author	Can create and edit own content
Editor	Create and edit all CMS content and deploy to Staging and Live
Developer	CrownPeak Technology Developer. Access to templates and configuration. Developers cannot configure users
Admin	Add/delete users, view reports, content/approval override, Workflow Administration, Configuration in Staging and Live
Sample Pharma	View example for pharma site.

View only groups may need to be configured if you need to restrict access to specific sites. For example, if CrownPeak is being used to manage sites for multiple locales, there may be users restricted to one locale or another.

If necessary, modify access requirements for default groups. Add access requirements for new ones.

<b>Editing</b>					
<b>Group Name</b>	<b>Templates</b>	<b>Models</b>	<b>ACL</b>	<b>Workflow</b>	<b>Modify users &amp; groups</b>
Author	N	N	N	N	N
Editor	N	N	N	N	N
Developer	Y	Y	Y	Y	N
Admin	N	Y	Y	Y	Y
<b>User's Content</b>					
<b>Group Name</b>	<b>Draft</b>	<b>Rejected</b>	<b>Pending</b>	<b>Staging</b>	<b>Live</b>
Author	Y	Y	N	N	N
Editor	Y	Y	Y	Y	Y
Developer	Y	Y	Y	Y	Y
Admin	Y	Y	Y	Y	Y
<b>Other's Content</b>					
<b>Group Name</b>	<b>All States</b>				
Author	N				
Editor	Y				
Developer	Y				
Admin	Y				



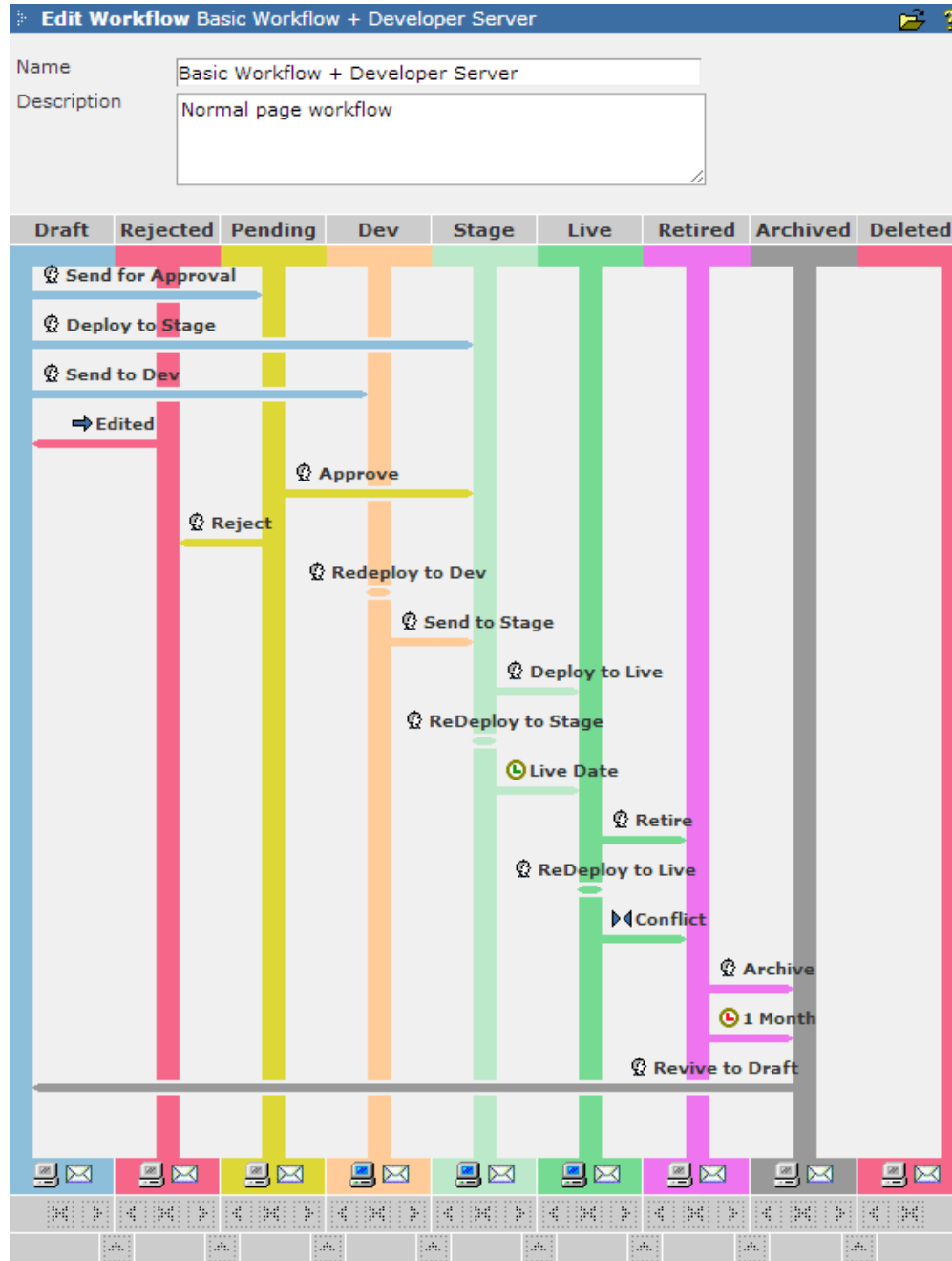
## Workflow

The workflow pipeline describes a document's life cycle. As a document proceeds through its existence within the CMS, specific actions can be performed on the document only at certain states (ex. Draft, Pending, Live). For example, a document that has not been approved cannot be deployed to the website, and a document cannot be retired if it is not currently live.

This implementation will leverage the standard CrownPeak workflow, as described below

This workflow has two publishing states: Stage and Live

Below is the default workflow from the admin interface:



## Approvals

Along with Workflow, the Approval Process controls how a document moves between states. After a document is created in Draft mode, a number of approvals may be required to move the document to the next state. While the document is waiting for approvals, it is in the Stage mode. If an approver rejects a document, it will have a status of Rejected, and the author will need to make changes and re-submit the document for approval.

**Note:** With Workflows, Approvals, and Groups, it is best to model how your organization actually works. Try to avoid using the CMS to roll out a new workflow unless all of your users will agree to the new workflow. Also, remember that some of the workflow can exist off-line, such as editing a new document. By keeping it simple, you will help promote adoption of the new system, and more detailed workflow rules can be added in the future.

## Workflow Specification

Define the access control / approvals for each state in the workflow. This table show defaults states, approvals, and access. Modify if necessary. Add states and groups as needed.

Workflow/Publishing							
Group Name	Draft to Pending	Pending to Staging	Redeploy Staging	Reject	Staging to Live	Redeploy Live	Retire
Author	Y	N	N	N	N	N	N
Editor	Y	Y	Y	Y	Y	Y	Y
Developer	Y	Y	Y	Y	Y	Y	Y
Admin	Y	Y	Y	Y	Y	Y	Y

## Users

List the users and their group and site access below

Email	First Name	Last Name	Groups	Site Access
Jane_doe@adventgeneral.com	Jane	Doe	Editors, Admin	Stage

## Post-Launch Support and Modifications

Once the site is live and launched, there will be changes. Whether you are working with support or managing maintenance on your own, CrownPeak has best practices and recommendations for making certain updates. All this information is available from Connect, the CrownPeak community site. Some example documents below.

Best practices for updating the CMS once the site is in production are listed below.

### *Output Template changes*

CrownPeak recommends creating an alternate output to review changes on the `staging server. See multiple output best practices - <http://connect.crownpeak.com/documents/best-practices/configuring-crownpeak-for-multiple-projects-and-de>

If updates cannot be created and tested using the process above, work with the customer to schedule a time when live publishing can be disabled so the updates can be completed.

### *Content Changes*

See branching best practices - <http://connect.crownpeak.com/documents/best-practices/branchingbestpracticespdf>

### *New HTML or functional code*

See HTML best practices - <http://connect.crownpeak.com/documents/best-practices/htmldeliveryrequirementsandrecommendationspdf>

### *Workflow changes*

Since workflows are attached to live assets, the best practice for changing the workflow is to clone, modify, then update assets to use clone

When adding steps to a workflow, be aware that for new publishing steps, it may be necessary to branch existing assets and move them through the workflow, so the new step can be applied

### *Group changes*

When cloning an existing group, check the group cloning option so the same access permissions will be applied to the new group

Another best practice is to use the Inherit option for assets so the permissions are inherited from the folder.

## Appendix A

### Sitemap

