

Beginner Customer Content Management – D2D Portal



Created by: Allie Pettigrew



Introductions

- Who are you?
- Who do you work for?
- Why are you here?



Agenda

- SMEs for non-Portal D2D Applications
- What is D2D Portal?
- What is Content?
- What is a Content Manager?
 - Content Manager Roles
- D2D Portal Policies
- What are Customers?
- D2D Portal Content Type Use Cases
 - Dataset Pages
 - Report Pages and Report Links
 - Articles/Basic Pages
 - Documents
- D2D Portal Best Practices
- Limitations to what you will be able to do on the D2D Portal.

SMEs for non-Portal D2D Applications

- Tableau – SME is walter.mehra@gsa.gov
- MAX.gov – POC is maxsupport@max.gov
- D2D questions – POC is askd2d@gsa.gov



What is D2D Portal?

- The Data to Decisions (D2D) Platform is a tool for sharing reports and datasets with an audience of your choosing.
- The D2D Portal is the user-centered website for the platform that organizes and manages access to Content from different D2D sources and applications.
- The D2D Portal was created using the Drupal Content Management System (CMS).
 - What is a CMS?
 - A tool that allows you to manage web Content without being a computer programmer!
 - What is Drupal?
 - Drupal is an open-source CMS widely used in the federal government.



What is Content?

- What is Content?
 - Everything is Content.
- The most important types of Content on the D2D Portal (the “Big 3”) are:
 - 1.
 - 2.
 - 3.
- Content Types that support the “Big 3” are:
 - 1.
 - 2.
- There are even more types of Content on the D2D Portal that we won’t discuss today:
 - 1.
 - 2.
 - 3.



What can a D2D Content Manager do?

- Content Manager is the person who creates, edits, and maintains Content for your Customer on the D2D Portal.
- You will be able to create and edit:
 - 1.
 - 2.
 - 3.
 - 4.



Content Manager Roles

- **Beginner Content Manager can create and edit:**

- 1.
- 2.
- 3.
- 4.

- **Intermediate Content Manager can create and edit:**

- 1.
- 2.
- 3.

- **Advanced Content Managers can:**

- 1.
- 2.

So What? Who Cares? What's In It For Me?

- Why have you created the Content?
- What does it tell users they can't find somewhere else?
- What value does it provide?
- Who is your intended audience for the Content?
 - How will they know your Content exists?
- Do they want it?
- Will they use it?
 - **Have** they used it?
- Why should your intended audience take 15 minutes out of their day to log in to the D2D Portal and view your Content?



D2D Portal Policies

- Before you publish new Content on the D2D Production Portal:
 - Get internal approval.
 - Create on Staging – conduct QA and UAT.
 - EWG Approval.
- Before you make changes to existing Content on the D2D Production Portal:
 - Get internal approval.
- GSA Policy: links must work.
 - D2D Policy: if a link is disabled, please remove/correct it within 2 business days.
- Security Policies:
 - Please don't link to other Content on the D2D Portal in the body/summary of your Content.
 - Get approval before you publish any Content containing sensitive information.



User Types

- Anonymous/Unauthenticated user – anyone who does not log into the D2D Portal using MAX.gov.
 - Can only view public Content.
- Authenticated user – anyone who has logged into the D2D Portal using MAX.gov.
 - Can view Content visible to the federal government and their specific agency.
- Customer Member – authenticated user who has been added to a Customer group.
 - Can access Content owned/managed by their Customer.
- Customer Content Manager - Customer member who has the ability to create and edit Customer Content.



Content Type: Customer

- Customer – group of users who require access to the same Content.
 - Agency – a federal government agency (GSA, EPA, DOJ, NASA).
 - Organization – a GSA business unit (PBS, OFM, Regions 1-11).
 - Community of Interest – inter-organization or inter-agency group of users who need to share access to common data (RPMT, ACT, OHRM Dashboards).
- Customers own all Content.
- Users are members of Customers.
- If Content is Private (not visible to anyone with internet access), only Users who are members of the Customers who own the Content may see the Content.
- Each Customer is represented on the D2D Portal by a Customer Page.



Customer Page

- After you log into the D2D Staging Portal, use the Keyword Search function to find and navigate to your Customer's Page.
- Everything starts from the Customer Page!
- From the Customer Page you can:

CREATE CUSTOMER CONTENT

- [Add an Article](#)
- [Add a Dataset](#)
- [Add a Document](#)
- [Add a Report](#)

➤ Edit existing Content:



Use Case 1: Dataset Page

- Dataset – a page on the D2D Portal that provides
 - Description of the dataset.
 - Plain English Data Dictionary.
 - Sample file of the dataset.
- To create/edit a Dataset:
 - Customer to own the Dataset exists/has been created by the D2D Team.
 - Sample file of the dataset located on your PC.
 - Plain English Data Dictionary has been created defining all of the data elements in the sample data file in plain English.
- Supplemental Material:
 - Related Documents.



Exercise



Use Case 2: Report Page

- Report – a page on the D2D Portal that describes a visualization of data, created using an analytic tool.
 - Reports contain Report Links.
 - Report Links are the way the D2D Portal accesses visualizations created with analytics tools.
 - Reports can contain as many Report Links as necessary in a carousel.
 - Reports can contain Report Links to multiple kinds of analytics tools:
 - Tableau
 - MicroStrategy
 - D2D Portal Pages
 - External Websites
- To create/edit a Report:
 - Customer to own the Report exists/has been created by the D2D Team.
- Supplemental Material:
 - Related Documents
 - Related Datasets

Use Case 2.5: Report Links

- Report Link – the connection between Drupal (D2D Portal) and an analytic tool (Tableau) that allows the D2D Portal to display the visualization.
- The D2D Portal uses:
 - the Tableau workbook name and name of the first view in the workbook **in HTML format** to communicate with the Tableau Server.
 - the Analytics Account (Tableau Username) to determine what data in the Report a Customer's members are authorized to view.
 - Analytics Accounts have to be created for you in conjunction with the Tableau Support Team.
- To create a Report Link, you must have:
 - Customer to own the Report Link exists/has been created by the D2D Team.
 - Tableau Workbook has been published to the Tableau Staging/Production Server.



Options for Report Links

- The tool to which they link:
 - MicroStrategy Project.
 - Tableau Workbook.
 - Additional customization is available to display Tableau Workbooks.
 - External website.
 - D2D Portal Page.
- How the Report will be displayed on the Report page.
- Statistics Display.
- **Analytics Account.**



Exercise



Use Case 3: Article/Basic Page

- Article – “typical” webpage; used to publish information related to a Customer or Content.
 - Supports:
 - Customer
 - Dataset
 - Report
 - Data Model
- To create/edit an Article:
 - Customer to own the Article exists/has been created by the D2D Team.
 - Text of the Article composed in the word-processing software of your choice.



Exercise



Use Case 4: Document

- Document – link to a supplemental file that appears on other Content pages.
 - You can also link directly to a document from within a Tableau Workbook.
- Documents provide supplemental written material for your D2D Portal Content:
 - Survey questionnaires
 - User guides
 - Organization or Agency-specific material
- To create/edit an Article:
 - Customer to own the Document exists/has been created by the D2D Team.
 - Document is saved to your PC.



Exercise



D2D Portal Best Practices

- When you are updating existing Content, make one change at a time.
- When you are updating existing Content, make a note in the “Revision log message” field after you have finalized your changes.
 - Note should include all the changes you made.
- Before you create new Content, do a keyword search for what you want to call it.
 - It is important that each piece of D2D Portal Content have a unique name.
- When creating new Content:
 - If it doesn't work, don't create a new piece of Content; try to figure out why it didn't work.
- Use Google Chrome to work in the D2D Portal.
- Compose all of your text in a word-processing software.
- Please send all requests/questions for me over email, not Google Hangouts.
- Read the manual! It contains step-by-step instructions on how to do everything we have discussed.

Limitations

- If I didn't tell you how to create it, edit it, or otherwise do it, you may not create it, edit it, or otherwise do it.
- If you have any questions regarding what you can do on the D2D Portal, please contact askd2d@gsa.gov.
- If you want to do something I did not tell you how to create, edit or otherwise do, please contact askd2d@gsa.gov.



Q & A

