

NewsLynx onboarding checklist

Preboarding

- ☐ Do they use Google Analytics? (If “no,” the organization won’t be able to use any of the metric capabilities.)
- ☐ Create a new organization. (This must be done on the command line. See [documentation](#))
- ☐ Create a new user. (This must be done on the command line. See [documentation](#))

Part 1, Organization details

Authentication

The user will need credentials for the following accounts in order to authorize NewsLynx to access its data

- ☐ Google Analytics
- ☐ Twitter (used to make requests for share counts)
- ☐ Facebook (same as above)

Org info

- ☐ Homepage (make sure to include `http://`)
- ☐ Timezone
- ☐ Staff Twitter List(s)
- ☐ Main Twitter account(s)
- ☐ Main Facebook page(s)
- ☐ Article RSS Feed(s) for ingestion

Article and impact details

- ☐ Create subject tag segments
- ☐ Create impact tags according to organizational goals

Part 2, Recipes

- ☐ Discuss existing workflows
- ☐ Identify existing Sous Chefs that cover those services and create Recipes to match existing workflow
- ☐ Identify areas to possibly create new Sous Chefs for
- ☐ Walk through approving events and associating them with articles

Part 3, Metrics

- ☐ Walk through sorting and filtering articles in the comparison view
- ☐ Walk through article detail page, creating events, metrics and exporting data