

Metric Templates

About	2
Requesters	2
Purpose & Goals	2
About User Persons	2
Regular User	2
Power User	3
Administrator	3
User Stories	4
Administrators User Stories	4
Power User User Stories	4
Access Right	5
Regular User	5
Power User	5
Administrator	5
Vocabulary	5
Element Template	5
Default Element Template	5
Custom Element Template	5
Default templates (with typical data)	5
Undimensioned Metric (default template)	6
Report (default template)	6
External report (default template)	6
Changes in top menu	6
Add available template ("New" menu)	6
"Element templates" ("Admin" menu)	7
Metric creation page (changes)	8
"Measured"	8
Use settings from template	9
List of Templates	9
Standard filters in our grids.	10
Template in grid	10
Metric Editor (New template Popup)	10
Create new template	11
Template name	11
Metric Editor (Update template Popup)	11

Update template	12
“Template”	12
Confirmation popups	12

About

Requesters

Metric Insights

Purpose & Goals

This functionality will make more easy creating of new elements. When user creates new elements (Metric) he have to fill up many information.

Usually these information are typical and can be used many times for many elements

We want create template with typical information which user will use for new elements where he will fills up only required fields.

We will create 2 different types of templates.

Default templates (not editable by user, but can be changed via migration) will be installed with system. And other type is **custom template** may be created by Administrator.

Detailed see below.

Document with questions about these functionality:

https://docs.google.com/a/metricinsights.com/document/d/1_L_msN3Tto_i6KASLMxIWI_vV6mq4DLjeKjq_uAUbUU0/edit?usp=sharing

About User Persons

It is short information about our users. This information will be used in development of User stories and use cases.

Regular User	
Persona:	Manager in team of analysts, top manager of company etc.
Goals and tasks:	<p>He do not have no time and desire to complicated settings. He needs to access information quickly and easily while performing his daily duties.</p> <p>Spends his work time:</p> <ul style="list-style-type: none"> • Requesting and reviewing research reports • preparing memos and briefs for agency heads

	<ul style="list-style-type: none"> manage people or group of peoples and take decisions.
Environment:	He is comfortable using a computer and refers to himself as an intermediate Internet user. He is connected via strong internet connection or 4G mobile internet connection. He uses email extensively and uses the web about 2-8 hours during his work day.

Power User	
Persona:	Senior manager or manager in team of analysts
Goals and tasks:	<p>He do not have time and desire to complicated settings but he have to setup access to information for other managers. He needs to access and set up information quickly and easily.</p> <p>Spends his work time:</p> <ul style="list-style-type: none"> Requesting and reviewing research reports Manage team of analysts Manage information for team.
Environment:	He is comfortable using a computer and refers to himself as an intermediate Internet user. He is connected via strong internet connection or 4G mobile internet connection. Sometimes he use smartphone to check or share information. He uses email extensively and uses the web about 6-8 hours during his work day.

Administrator	
Persona:	Senior manager or Administrator of Analysis system.
Goals and tasks:	<p>He have time and desire to complicated settings. He knows our system and he works with our solution architects. He needs have access to information quickly and easily while performing his daily duties.</p> <p>He have to provide hot and correct information for managers, analysts or top manager from his company etc.</p> <p>Spends his work time:</p> <ul style="list-style-type: none"> Requesting and reviewing research reports Setup metrics, reports Manage and analyze information and systems
Environment:	He is comfortable using a computer and refers to himself as an advanced Internet user. He is connected via strong internet connection

	or 4G mobile internet connection. He uses email extensively and uses the web about 6-8 hours during his work day.
--	---

User Stories

User stories are prioritized by the customer (or the product owner in Scrum) to indicate which are most important for the system and will be broken down into tasks and estimated by the developers.

Every user story must at some point have one or more acceptance tests attached, allowing the developer to test when the user story is done and also allowing the customer to validate it. Without a precise formulation of the requirements, prolonged non constructive arguments may arise when the product is to be delivered.

Administrators User Stories		
User story ID	I want to...	So that...
1	As an Administrator i want to create metric but do not spend time to fill up all typical fields	I can choose template with typical information for Metric on the New Metric page
2	As an Administrator i want to see all template in the system	I can open templates editor with grid of templates where i will see all template
3	As an Administrator i want to create my own template	I can create New template from Metric by click to the icon in Metric editor
4	As an Administrator i want to change default information in my template for metric	I can open any Metric in Metric Editor, click to the icon, choose any of templates and Update Chosen template
5	As an Administrator i want to remove my old custom template.	I can open list of templates and remove my old templates

Power User User Stories		
User story ID	I want to...	So that...
8	As an Power User i want to see all template in the system	I can see list of template when i create new Metric
9	As a Power User i want to see information about template which i can choose	I can see information about template when template has been chosen for some element in the editor but this element is not saved yet.

10	As an Power User i want to create metric but do not spend time to fill up all typical fields	I can choose template with typical information for Metric on the New Metric page
----	--	---

Access Right

Regular User	Power User	Administrator
Do not have access to the templates	Can create Metric from existing templates	<ol style="list-style-type: none"> 1. Can see all templates 2. Can create new template from existing element 3. Can update custom template from existing element 4. Can create new metric from template

Vocabulary

Element Template

It is a **new entity** with typical information and settings of Metric.
Can be copied or updated from Existing elements.

Default Element Template

It is default information for Metric or Report which can not be removed or changed by any type of Users.
This template can be changed via migration.

Custom Element Template

It is default information for Metric. Can be copied by admin from existing Metric. Admin can create, delete or update custom template.

Possible settings:

- Administrator can change setting for every of fields.
- Administrator can change information for every of fields.

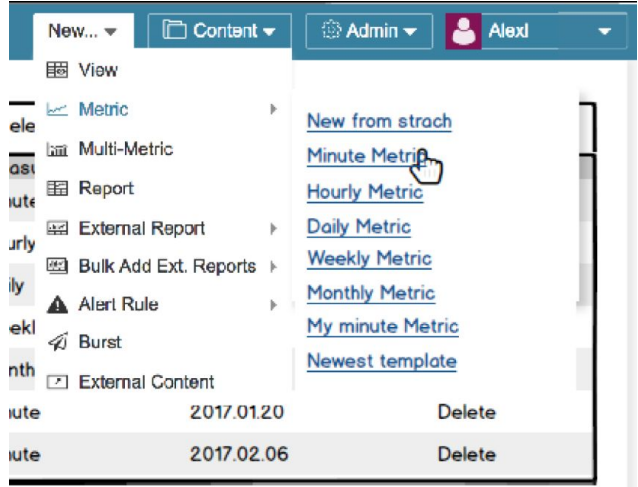
Default templates (with typical data)

The list of settings and properties for each default template.

Name	Type	Link to element on Adam	Link to Json (exported element if it will be changed on adam)
------	------	-------------------------	---

Undimensioned Metric (default template)	Undimensioned Metric	https://adam.metricinsights.com/editor/metric/edit/element/100036/	https://goo.gl/7R0Kvz
Report (default template)	Basic Report (keep history, backfill, source table)	https://adam.metricinsights.com/editor/report/edit/element/3806	https://goo.gl/jlj5UB
External report (default template)	Basic external report (links user to tableau)	https://adam.metricinsights.com/editor/extreport/edit/element/1145	https://goo.gl/cA4XEM

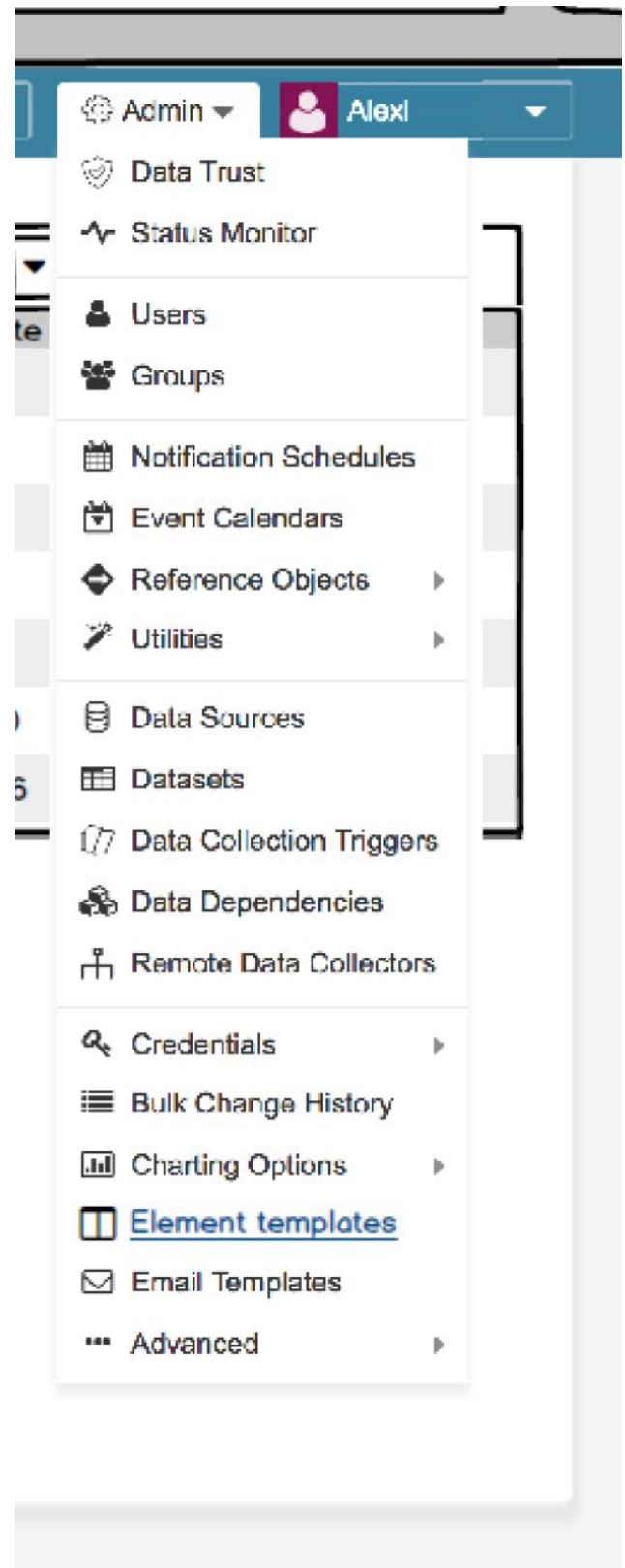
Changes in top menu

1	<p>Add available template (“New” menu)</p> <p>Add sub menu with list of template for every elemen. After click to this item user will be to the Metric Creation Page.</p>	
---	--	---

2

“Element templates” (“Admin” menu)

Add new item to the Admin menu “Element templates”. Bu click user will be redirected to the page with list of template.



Metric creation page (changes)

A Web Page

https://adam.metricinsights.com/editor/metric/draw/ds/835_sql/

New Metric

New... Content Admin Alex ?

Measure of -- +

Measured --

Use settings from template --

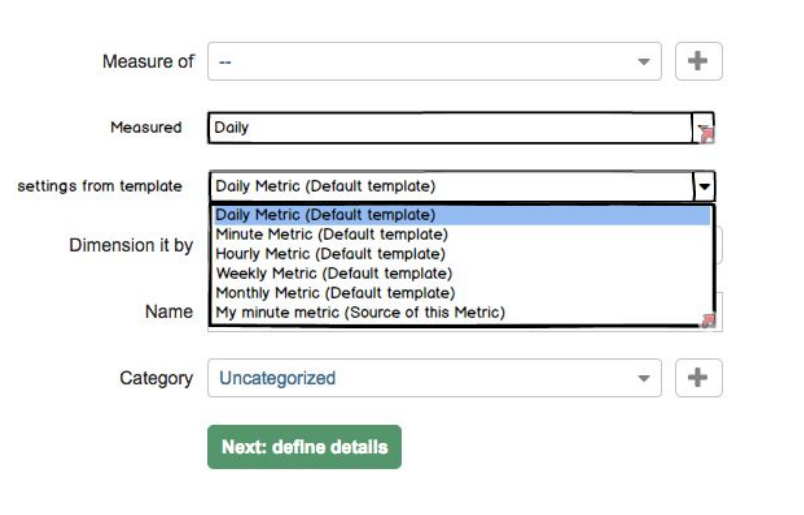
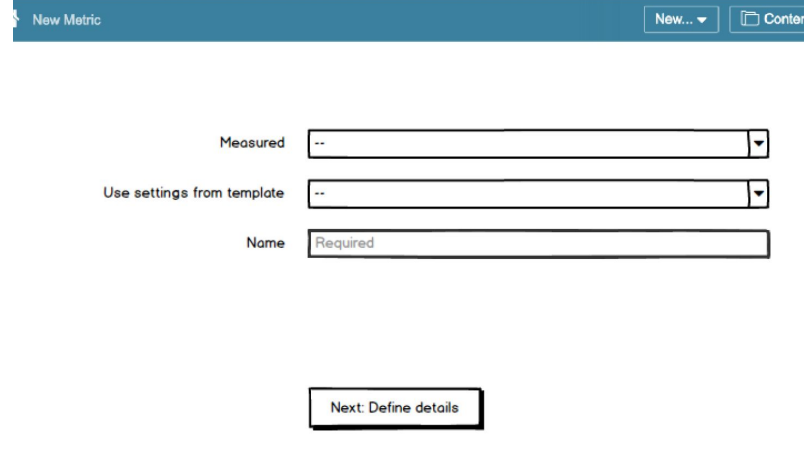
Dimension it by Not Dimensioned +

Name

Category Uncategorized +

Next: define details

1	“Measured”	<p>If value in “Measured” is chosen we change order of values for templates in “Use settings from template” dropdown. Also template for chosen “Measure” will be chosen automatically.</p> <p>Default order:</p> <p>Measure of -- +</p> <p>Measured --</p> <p>Use settings from template --</p> <p>Dimension it by</p> <p>Name</p> <p>Category Uncategorized +</p> <p>Next: define details</p> <p>“Daily” has been chosen:</p>
---	-------------------	---

		
2	<p>Use settings from template</p>	<p>if template has been chosen, the all non important fields are hidden:</p> 

2	Use settings from template
---	----------------------------

New Metric

New... ▾Content

Measured

-- ▾

Use settings from template

-- ▾

Name

Required

Next: Define details

List of Templates

A Web Page

https://adam.metricinsights.com/templates/

Templates

New... Content Admin Alex

Templates		Filter by element type:		All	By template name
#	Template Name	Type	Measured	Last update	Actions
1	Minute Metric (Default template)	Metric	Minute	2017.01.01	
2	Hourly Metric (Default template)	Metric	Hourly	2017.01.01	
3	Daily Metric (Default template)	Metric	Daily	2017.01.01	
4	Weekly Metric (Default template)	Metric	Weekly	2017.01.01	
5	Monthly Metric (Default template)	Metric	Monthly	2017.01.01	
6	My minute metric	Metric	Minute	2017.01.20	Delete
7	Newest template	Metric	Minute	2017.02.06	Delete

1	Standard filters in our grids.	In dropdown we have to add types of available templates.
2	Template in grid	Information in the grid about template: 1. Name, Type (type of element), Measured, Last update, Actions (Only one available action now: Delete - only for custom)

Metric Editor (New template | Popup)

This popup will appear on the Metric Editor after click to the “New template” icon

The screenshot shows the Metric Editor interface with a browser window at the top. The URL is https://adam.metricinsights.com/editor/metric/draw/ds/835_sql/. The interface includes a navigation bar with tabs: Info, Date, Stoplights, Alerting, Charting, Associations, and Advanced. A toolbar contains icons for document, share, search, and other actions, along with buttons for 'Preview', 'Save', 'Enable & publish', and 'On Homepage'. Below the toolbar, there is a dropdown menu for 'Measure of' set to 'aaa'.

The 'Update or create template' popup is displayed in the foreground. It has a title bar with a close button (X). The popup contains two main sections:

- Create template From current element:** Indicated by a radio button and a document icon.
- Update existing template From current element:** Indicated by a radio button and a document icon with a refresh symbol.

Below these sections is a text input field labeled 'Template name' with a 'Required' label. At the bottom, there are two buttons: 'Submit' and 'Cancel'.

1	Create new template	Create new template from element editor. User go to existing metric, click to the “New template” icon and save information from this Metric like template with new name. See example above
2	Template name	It is name for new template

Metric Editor (Update template | Popup)

All change for every editor. Example provided for Metric editor but the same logic will be used in all places.

The screenshot shows the Metric Editor interface in a web browser. The browser address bar displays `https://adam.metricinsights.com/editor/metric/draw/ds/835_sql/`. The page header includes navigation links: Home, Metrics / My Metric From Template, New..., Content, Admin, and a user profile for Alex. The main toolbar contains tabs: Info, Data, Stoplights, Alerting, Charting, Associations, and Advanced. A 'Measure of' dropdown is set to 'aaa'. The 'Update or create template' popup is open, showing two options: 'Create template From current element' (unselected) and 'Update existing template From current element' (selected). Below these options is a 'Template' dropdown menu currently showing 'My minute metric (Source of this Metric)'. A hint message states: 'Hint: You can not update default templates'. At the bottom of the popup are 'Submit' and 'Cancel' buttons. A hand cursor is pointing at the 'Submit' button.

1	Update template	Administrator can update template from element editor. User go to existing metric, click to the "New template" icon, choose "Update existing template". In this place user can choose any of custom templates in dropdown. After submit custom template will be updated from current Metric
2	"Template"	Dropdown with available templates. In this dropdown user can see (Source of this Metric). It is template from which current metric was created.

Confirmation popups

Confirmation popup appears when Template was updated or created. See examples below.

