

Onboarding Content: Best Practices

This article describes how to use a spreadsheet to strategically onboard content to Metric Insights in a more efficient and organized way.

The example spreadsheet is used as a mapping tool to help Administrators add content to the MI application. The spreadsheet can help to understand which Elements have been onboarded to completion and which may still need work.

[Here](#) you can find an example spreadsheet in Google Sheets. Duplicate it to your Drive or download as an XLSX or ODS file to your PC.

NOTE: When you start to use the table to onboard the content, all necessary Data Sources should be set up.

General Information

	A	B	C	D	E	F	G	H	I	J	K	L
1	Content	Tool	Object Type	URL	Location	MI Category	Tags	Folders	Update Interval	Recertification	Business Owner	Technical Owner
2	Sales Dashboard	Tableau			Sales Project	Sales	Sales, global, revenue, ARR	Global Sales, Sales OPS	Daily	Quarterly	Franis Thompson	Kathy Allison
3	OPS Scorecard	Power BI			OPS MGM Project	OPS	ops, USA, mgmt	OPS, MGMT	Weekly	Monthly	Franis Thompson	Kathy Allison
4												
5												
6												
7												
8												
9												
10												
11												
12												

The example file contains several tabs. All of them, as well as the column names in all the tables, are optional. You can delete them if they don't fit your needs and add as many new ones as you like.

Below is a review of the suggested tabs and the example columns of the table.

Content Tab

This tab is an inventory of objects. Use the tab to list all the Elements (tiles) – Metrics, Dashboards, Reports, etc. – to be added to the Metric Insights application.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Content	Tool	Object Type	URL	Location	MI Category	Tags	Folders	Update Interval	Recertification	Business Owner	Technical Owner
2	Sales Dashboard	Tableau			Sales Project	Sales	Sales, global, revenue, ARR	Global Sales, Sales OPS	Daily	Quarterly	Franis Thompson	Kathy Allison
3	OPS Scorecard	Power BI			OPS MGM Project	OPS	ops, USA, mgmt	OPS, MGMT	Weekly	Monthly	Franis Thompson	Kathy Allison
4												
5												
6												
7												
8												
9												
10												
11												

Column descriptions:

- **Content:** Name of and object
- **Tool:** The platform where that object is sourced
- **Object Type:** Type of object defined in source (e.g dashboard, live dashboard, PDF, etc.)
- **URL:** The address of an object
- **Location:** The folder or project within the Tool where the object is stored
- **MI Category:** The Category within Metric Insights in which the object has to be placed
- **Tags:** Keywords or glossary terms (if applicable) which can make searching for content easier
- **Folders:** The Folders within Metric Insights system (optional)
- **Update Interval:** How frequently the object needs to be updated
- **Recertification:** How often the object undergoes certification within a publishing workflow (if applicable)
- **Business Owner:** Regular, Power User, or Administrator responsible for answering business-related questions
- **Technical Owner:** Power User or Administrator responsible for answering technical questions
- **Data Steward:** Regular, Power User, or Administrator that is a Data Steward of the object

Data Steward, Business and Technical Owners are Users that exist in Metric Insights. For more details about the difference between those check [What Types of Users Exist in Metric Insights?](#) article.

Categories Tab

In this tab you can list all the Categories that have to be created within Metric Insights application.

Every Element within Metric Insights **must** be associated with a single Category. When "Access to Element" is mentioned it means an access to all Elements within a Category.

	A	B	C	D	E	F	G	H
1	MI Category	Category Business owner	Categories Technical Owners	Is Category Auto Synced?	Synced From Tool	Synced from Location	Publishing Workflow	
2	OPS	Mike Smith	Jane Doe	Y	Tableau	OPS Project	1-Party	
3	Public	Hong Chau	Kerry Condon	Y	Tableau	Public Project	2-Party	
4	Sourcing	Jamie Lee Curtis	Stephanie Hsu	N			3-Party	
5	Global MGMT	Brendan Gleeson	Stephanie Hsu	N				
6	Strat & Cap	Judd Hirsch	Bill Nighy	N				
7								

Column descriptions:

- **MI Category:** The name of the Category to create in MI application
- **Category Business Owner:** The name of the User that is a Business Owner of the Category
- **Category Technical Owner:** The name of the User that is a Technical Owner of the Category
- **Is Category Auto Synced:** Is the Category used as the target/destination for a Data Source using auto-sync (optional)
- **Synced From Tool:** Plugin association with related Data Source (if auto-sync is used)
- **Synced From Location:** Used to further specify location of content (within Data Source, within workbook, from other Category within publishing workflow, etc.)
- **Publishing Workflow:** To which Publishing Workflow this Category belongs. To learn more about Publishing Workflows check [this article](#)

For more details about difference between Technical Owner and Business Owner check [What Types of Users Exist in Metric Insights?](#) article.

Category Access Tab

Here you list the Groups within Metric Insights and define to which Categories those Groups will have access.

	A	B
1	MI GROUP	Access to MI Category
2	Geography Operations Managemnet	OPS
3	Geography Operations Managemnet	Public
4	Global Sourcing Manager and Specialists	Sourcing
5	Global Sourcing Manager and Specialists	Global MGMT
6	Strat & Cap - Policy and Compliance	Strat & Cap
7		

NOTE: MI GROUP column lists the Groups within Metric Insights only.

Personas Tab

In this tab you can list the types of Users (by role, identity, function, etc.) that will be working with the Metric Insights instance.

A persona is a pretended User for the purposes of confirming User access to content and functionality. In example, you may consider a Sales persona mapped to a sales group in AD which has access to all content in the sales category across multiple platforms of inventory.

	A	B	C	D
1	Persona	LDAP GROUP	MI GROUP	Access/Privileges Set
2	Geography Operations Managemnet	GEO_OPS_USA	Geography Operations Managemnet	1
3	Global Sourcing Manager and Specialists	GLOBAL_SOURCE_MGMT	Global Sourcing Manager and Specialists	2
4	Strat & Cap - Policy and Compliance	STRAT_CAP_BRAZIL	Strat & Cap - Policy and Compliance	2
5				
6				

Column descriptions:

- **Persona:** The name of the Users type
- **LDAP Group:** The Distinguished Name of the Group in LDAP to which the persona may belong
- **MI Group:** The name of the Metric Insights Group associated with Persona
- **Access/Privileges Set:** The Privileges Set applied to the Users of chosen type (optional)

Portal Pages Tab

In this tab you can store the list of Portal Pages that need to be created.

	A	B	C
1	Page Name	Persona	Start Page
2	Sales Page	Global Sourcing Manager and Specialists	No
3	Report Viewer	Global Sourcing Manager and Specialists	No
4	Operational Metrics	Geography Operations Managemnet	Yes
5			

Column descriptions:

- **Page Name:** Name or internal name of a Portal Page object in Metric Insights
- **Persona:** The name of a persona from related tab
- **Start Page:** Indicate if this Portal Page will be a Start Page instead of the catalog

Privilege Sets Tab

Privilege Sets are complex and must be configured directly on Metric Insights. This tab can be used to generally define what Privileges that Privilege Set enable. For more details about different Privileges check [Privilege List](#).

	A	B
1	Privilege Set ID	Privileges
2		1 Create Data Sources, datasets, triggers, folders, tags, etc
3		2 Create folders, alerts, bursts
4		3 Create portal pages

Users Tab

In this tab you can define a list of pilot Users that can be used to confidently confirm the right feature, functions, and accessible content within the Metric Insights application.

	A	B	C	D	E	F	G
1	Persona	Last Name	First Name	E-mail address	Network User ID	REGION	User Type
2	Geography Operations Managemnet	Ana	de Armas	adearmas@example.COM	NA123KP	USA	Regular User
3	Global Sourcing Manager and Specialists	Michelle	Williams	Michelle.Williams@example.COM	MWABC1	USA	Regular User
4	Strat & Cap - Policy and Compliance	Michelle	Yeoh	myeoh@example.COM	AYEOH23	Brazil	Power User
5							

Column descriptions:

- **Persona:** Persona (as defined in other tabs) associated with a specific User
- **Last Name:** Last name
- **First Name:** First name
- **Email Address:** Email address
- **Network User ID:** User's ID in the network
- **Region:** The region the User is working from (if applicable). If features, functions, and content are subdivided, add columns for the purposes of validation.
- **User Type:** The type of the User within Metric Insights system

For more details about User types check [What Types of Users Exist in Metric Insights?](#) article.