# User Guide

Table of Contents:

## 1. Introduction

Performance Dashboard on AWS (PDoA) is an open source solution for national, municipal and local governments to publish and visualize their data. Governments can use the solution to share data-driven stories, including digital service performance and other metrics, with internal stakeholders and external constituents. Performance Dashboard on AWS is accessible, open, and scalable to meet the diverse reporting needs of governments.

This user guide will describe the system's functionality and presumes that the system is deployed and operational. If you need technical assistance with deploying the system, contact your system administrator.

## 2. User Roles

Performance Dashboard on AWS offers two distinct roles: Editors and Viewers. The available features vary based on the user's role when accessing the website.

### Editors

Editors have a privileged role that enables access to the website's dashboard management features. Editors have the ability to create, edit, delete, archive, and re-publish dashboards. Editors ultimately determine what dashboards are available to Viewers—the general users who visits the website to only consume information.

Government system administrators assign the Editor role to specified personnel. Authentication enforces that the users successfully recognized as Editors are those that have been determined at your system administrator's discretion. If a user attempts to log in as an Editor but doesn't have the role set by a system administrator, they will receive a failed login message.

The Dashboard Workflow section describes the dashboard management features available to Editors.

### Viewers

Viewers are visitors to the website that are not authenticated into the Editor role. Viewers are able to view dashboards that have been published by Editors for public access. Dashboard management features are not accessible to the Viewers.

## 3. Website Layout

The website is organized into a few key environments that serve as the main means for navigation. Access to and presentation of these webpages vary based on a user's designated role.

The Homepage is where all of the published dashboards are publicly available. Both Editors and Viewers have the same experience here as users browse and search through all of the published dashboards. The homepage's description and title can be edited by an Editor in the Settings page as described in the Website Settings section below. Published dashboards are displayed in a single listing or in groups by topic areas, which offer categories to organize dashboards. Topic areas, which may be used to represent ministries or subject matter, can be set by an Editor in the Settings page.

Users can use the homepage's search bar to filter the available dashboards by title. Each dashboard's title and date/time of its most recent update are displayed in the list.

Users can view any of the published dashboards by selecting its name. This will open the published dashboard, displaying all of the dashboard's content. Users have the ability to return to the homepage by selecting the All Dashboards link at the top of the page.

# Performance Dashboard

The Performance Dashboard makes data open and accessible to provide transparency and help drive the ongoing improvement of digital services.

|  | **Search** |
|---|---|

**Office of the CTO**   &minus;

Quarterly report
*Last updated 2020-11-10 05:14*

Service Dashboard
*Last updated 2020-11-12 03:54*

## Website Settings

Some parts of the website can be customized, such as the headline and description on the Homepage above.  To make these customizations, Editors can go to the Settings page by clicking on the Settings menu on the top navigation bar.  Once there, Editors can manage topic areas, edit the default acknowledgement statement used for publishing dashboards, and edit the headline and description on the Homepage.

### Topic Areas

Before getting started with dashboards, Editors must first create a topic area.   On the Settings page, Editors click on "Topic areas" on the left menu. Editors can create as many topic areas as needed for organizing the dashboards.  Editors can also rename and delete topic areas.  A topic area can only be deleted if there are no dashboards associated with it.  To do so, Editors must delete the dashboards associated with that topic area, or associate them to another topic area.

### Publishing Guidance

Publishing guidance is text that users must acknowledge before they publish a dashboard. For example, Editors can use this text to remind users to check for errors or mistakes, sensitive or confidential data, or guidance specific to an organization.  On the Settings page, Editors click on "Publishing guidance" on the left menu.  Editors then click on the Edit button to update the Acknowledgement statement field.  That field supports a subset of the Markdown syntax.  Editors can preview the Markdown text by clicking on the "Preview live text" checkbox.

### Homepage Headline

The Homepage where published dashboards are publicly available has a headline and description which can be edited.  On the Settings page, Editors click on "Published site" on the left menu.  Editors then click on the Edit button to update the Headline and/or Description fields.  The Description field supports a subset of the Markdown syntax.  Editors can preview the Markdown text by clicking on the "Preview live text" checkbox.

## Getting Started with Dashboards

After successfully logging in, Editors arrive at the Landing Page with links to create a new dashboard, view existing dashboards in all states, and view the published site. This page can be accessed by Editors at any time by clicking the website title in the navigation bar.

## This is where you will manage your performance dashboard.

### Create a new dashboard

Build draft dashboards by adding charts, tables and text as content. Publish dashboards to share results, track progress, or tell stories about a project, program, service, etc.

**Create dashboard**

### View existing dashboards

See the dashboards that others have created.

**View dashboards**

This site is where you manage the performance dashboard.
Do you want to see what your viewers see?

**View the published site** ⧉

Dashboard (Example: "www.performancedashboardonaws.com/admin/dashboards")

The Dashboard page is where Editors can access and take action on dashboards across their different states. The webpage's subsections include drafts, publish queue, published, and archived tabs. Each subsection contains a table with all dashboards currently in that specific state. Each row in the table represents an individual dashboard. The row displays the dashboard's name, topic area, last updated date/time, and creator. A dashboard can be opened by selecting its name.

Each subsection includes a search bar. Editors can search through the subsection's dashboards by querying their search criteria against the dashboard name, topic area, and created by data. After searching, the subsection's table will update to only display dashboards that match the included search criteria.

An Editor's available actions on a dashboard are dependent on what subsection they're on:

Drafts – The Drafts subsection includes dashboards that were previously created but not yet published. A dashboard can be opened into the dashboard editor by selecting its name. Editors can create new dashboards to start the drafting process. The delete button enables Editors to delete one or many draft dashboards.

# Dashboards

**Drafts (1)**   Publish queue (0)   Published (2)   Archived (6)

You have access to view, edit, and/or publish the draft dashboards in this table.

[                    ] [🔍]                                    [ Delete ]   [ **Create dashboard** ]

☐   **Dashboard name**                    **Topic Area**        **Last updated ⌄**        **Created by**

Publish queue – The Publish queue subsection includes dashboards that have begun the publishing process but are not yet published. A dashboard can be opened into the publishing process by selecting its name. From there, Editors can return the dashboard to a draft state or publish the dashboard publically.

# Dashboards

Drafts (1)   **Publish queue (0)**   Published (2)   Archived (6)

These dashboards are waiting to be published. They cannot be edited unless returned to draft and they are not publicly visible.

[                    ] [🔍]

☐   **Dashboard name**            **Topic Area**        **Last updated ⌄**        **Created by**

Published – The Published subsection includes published dashboards that are currently visible on the Homepage. A dashboard can be opened into the Editor view of the published version. Editors can archive one or many dashboards to remove them from being publically available on the website's homepage.

# Dashboards

Drafts (1)   Publish queue (0)   **Published (2)**   Archived (6)

These are all of the published dashboards. You can view all dashboards but you need editor access in order to update a published dashboard.
View the published site ↗

[                    ] [🔍]                                                        [ Archive ]

☐   **Dashboard name**            **Topic Area**        **Last updated ⌄**        **Created by**

Archived – The Archived subsection includes previously published dashboards that are no longer visible on the Homepage. A dashboard can be opened into the archived view. From the archived view, Editors can re-publish the dashboard to make it publically available once again.

## Dashboards

**Drafts (1)**    **Publish queue (0)**    **Published (2)**    **Archived (6)**

These are all archived dashboards. Archived dashboards are not viewable on the published site. You can re-publish any version of an archived dashboard.

| | Dashboard name | Topic Area | Last updated ∨ | Created by |
|---|---|---|---|---|

## Dashboard States

When creating and managing a dashboard, an Editor will take actions that place the dashboard into different states. The dashboard state determines what actions an Editor can take on a dashboard. The following section defines each dashboard state.

Draft

Dashboards in the draft state are available for editing and are only accessible to Editors. A draft dashboard can either be a new dashboard (ex. Version 1) or an update (ex. Version 2) from an existing dashboard.

Publish Pending

Dashboards in the publish pending state are being prepared for publishing. Publish pending dashboards cannot be edited unless they are returned to a draft state.

Published

Dashboards in the published state are accessible to Viewers on the Homepage. Published dashboards can be updated or archived by Editors.

Archived

Dashboards in the archived state are previously published dashboards that are no longer accessible to Viewers. Editors can still access these dashboards via the Archived subsection on the Dashboard page. These dashboards can be republished, returning them to the published state.

# 4. Dashboard Workflow

Editing Draft Dashboards

Draft dashboards have two main sections to be edited during the creation process: dashboard details and dashboard content. Both are accessible for editing from the Dashboard Editor.

Dashboards > Government Modernization Program

DRAFT  📄 Version 1                                    Last saved a few seconds ago    **Preview**    **Publish**

## Government Modernization Program  Edit details
*Office of the CTO*

No description entered

---

This dashboard is empty. Build the dashboard by adding
charts, tables, and text as content.

**+ Add content**

---

Dashboard details include a dashboard's name, topic area, and description. The dashboard name will be viewable by Viewers on the Homepage.  The topic area is selected from the existing list of available options, which can only be adjusted by a system administrator. A dashboard will be listed under the selected topic area on the Homepage. The description is an optional field where the dashboard can be explained in greater depth. The description field supports Markdown (ex. bold styling), and a guide is made available for users to review the available options.

Dashboard details can be edited while the dashboard is in a draft state.

# Create new dashboard

## Dashboard Name

## Topic Area
Select an existing topic area

Office of the CTO ⬍

## Description - optional
Give your dashboard a description to explain it in more depth. This text area supports limited Markdown. View Markdown Syntax

Dashboard content includes charts, tables, and text. These content items are the foundational pieces to build a dashboard. Once added to a dashboard, each content item can be edited, reordered, and deleted from the Dashboard Editor. Selecting the "+ Add Content" button will start the process to add a new content item to a dashboard.

Adding a content item to a dashboard has two steps. In the first step, the type of content item must be selected out of the three options, charts, tables, and text. Once a type is selected, "Continue" will continue the process to the second step.

# Add content

## Select the type of content you want to add

○ Text
Add a formatted block of text. Input supports Markdown including links, bullets, bolding, and headings.

○ Chart
Upload a CSV file to display data as a visualization, including line, bar, column and part-to-whole charts.

○ Table
Upload a CSV file to display data formatted in rows and columns.

---

The second step of adding content varies based on the type of content chosen in the first step.

For charts, initial configuration requires first adding a title and then uploading a CSV file with the data to be visualized. Both are required fields. Once a title and CSV file are provided, the page will update to display a preview of how the chart will visualize the dataset. Editors may change the chart type by switching between bar, column, line, and part-to-whole. The chart summary is an optional field in which a description can be included to offer additional context for the chart.

Once "Add chart" is selected, the chart will be added as a new content item to the dashboard.

# Add chart

## Configure chart

**Chart title**

Give your chart a descriptive title.

**File upload**

Must be a CSV file. How do I format my CSV file? ↗

Drag file here or choose from folder

| Back | Add chart | Cancel |

---

If "table" is selected in the first step of adding content, the next step will require first adding a title and then uploading a CSV file. Both are required fields. Once both are provided, the page will be updated to display a preview of how the table will visualize the dataset. The table summary is an optional field in which a description can be included to offer additional context for the table.

Once "Add table" is selected, the table will be added as a content item to the dashboard.

# Add table

## Configure table

**Table title**

Give your table a descriptive title.

**File upload**

Must be a CSV file. How do I format my CSV file? ↗

Drag file here or choose from folder

Back    Add table    Cancel

If "text" is selected in the first step of adding content, the next step will require inputting a text title. The text field supports Markdown functionality for users to format their dashboard text.

By selecting "Add text", the text will be added as content to the dashboard.

**Text title**

Give your content a descriptive title.

[                                    ]

**Text**

Enter text here. This field supports markdown.View Markdown Syntax ↗

[                                    ]

---

[ **Back** ]  [ **Add text** ]  Cancel

The top left corner of the Dashboard Editor displays two labels, the dashboard name, and a link back to the Dashboards page. One label displays the current state of the dashboard, which is Draft while the Dashboard is being edited. The other label displays the dashboard's version number. If the dashboard is an initial draft that has not been published, the label will display "Version 1". If the dashboard is an updated draft based on an already published dashboard, the label will display "Version X" with X being one number greater than the most recent version.

The top right corner of the Dashboard Editor displays buttons to preview the dashboard and initiate the publishing process. Previewing a dashboard will present the current dashboard in a published view, enabling a review that simulates the Viewer's experience. Publishing will prompt a confirmation prior to starting the publishing process. If confirmed, the dashboard will have its state set to Publish Pending.

Last saved 6 minutes ago    **Preview**    **Publish**

# Government Modernization Program   Edit details
*Office of the CTO*

## Publishing Dashboards

There are two steps in the publishing process that must be completed prior to the dashboard being published.

In the first step, the dashboard version notes must be added. The version notes are accessible only to Editors. Version notes are the way to internally track changes for each version of a published dashboard.

# Government Modernization Program
*Office of the CTO*

**1** ━━━━━━━━━━━━━━ ② 
**Internal version notes**          Review and publish

## ① of 2 **Internal version notes**

### Internal release notes
Describe what changes you are publishing to the dashboard.

In the second step, the Editor must acknowledge the dashboard was reviewed and is ready for publishing. This is the final step before publishing the dashboard to make it available to Viewers.

Selecting "Return to draft" will set the dashboard state to Draft in order to make any additional edits. Selecting "Publish" will set the dashboard state to Published, making the dashboard available to Viewers.

## Government Modernization Program
*Office of the CTO*

**1** ——————— **2**

Internal version notes          **Review and publish**

**2** of 2 **Review and publish**

☐ I acknowledge that I have reviewed the dashboard and it is ready to publish.

**Back**     **Publish**

### Updating Published Dashboards

Published dashboards accessed by Editors via the Dashboards page can be updated with new revisions. Selecting "Update" will generate a new version of a draft dashboard that contains all the content of the published dashboard. The new version will have a higher version number (ex. Version 2) to signify that it's the most recent version. This new draft dashboard will proceed through the editing and publishing process. Upon being published, this new draft dashboard will replace the previously published version. The updated version number will be reflected on newly published dashboard.

PUBLISHED ▐ Version 1 Show version notes | Archive | Update

# Government Modernization Program
*Office of the CTO*

## Archiving Published Dashboards

Published dashboards accessed by Editors via the Dashboard page can archived to remove them from the published site. Selecting "Archive" will set the Dashboard's state to Archived. The dashboard will no longer be available on the published site.

Archived dashboards are still available via the Dashboard page. These dashboards are not deleted from the database. Editors can open archived dashboards to view their content.

## Republishing Archived Dashboards

Archived dashboards can be republished to return them to the published site. Editors may re-publish dashboards by opening the archived dashboard. Selecting "Re-publish" prompts a confirmation before the action is completed. Upon confirmation, the archived dashboard state is changed to Published. The dashboard is now published once again and available to Viewers on the published site.

Dashboards > Government Modernization Program

> ℹ️ This dashboard is archived. It is not viewable on the published site unless it is re-published

ARCHIVED  📄 Version 1                                                          **Re-publish**

# Government Modernization Program
*Office of the CTO*