

The Embed Feature for Streamlined Data Access and Collaboration

Empowering Data Insights with Seamless Embedding
and Collaborative Capabilities





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1. Introduction




In today's interconnected world, the ability to seamlessly integrate and embed features from one platform or application into another is becoming increasingly crucial. This integration empowers organizations to leverage the functionalities and insights provided by external platforms within their own applications, enhancing productivity, efficiency, and collaboration. With the Embedding Features functionality, ConverSight enables users to effortlessly integrate and utilize its powerful tools, such as Storyboards and data visualizations, within their own applications.

This whitepaper explores the benefits and implementation of embedding features from the ConverSight platform. It delves into the seamless integration process, showcasing how organizations can unlock the full potential of their data and enhance collaboration by embedding ConverSight's rich visualizations, analytics, and insights directly into their preferred applications. Through the Embedding Features functionality, users can enjoy a unified experience, accessing and interacting with ConverSight's robust capabilities without the need for constant platform switching. This integration facilitates data-driven decision-making, enhances collaboration across teams, and amplifies the value organizations derive from their data.



2. The Benefits of Embed Feature

The Embed Feature offers numerous benefits that enhance data accessibility, collaboration, and overall user experience. Here are some key advantages:

-  **Seamless Integration:**
The Embed Feature enables seamless integration of specific functionalities, such as Storyboards or data visualizations from ConverSight platform to another. This integration ensures a smooth and cohesive user experience by eliminating the need to switch between multiple applications.
-  **Enhanced Accessibility:**
Embedding features extends the reach of valuable data insights to a wider audience. Users can access and interact with embedded content directly within their preferred applications, eliminating the need for additional logins or navigating different interfaces. This accessibility promotes wider adoption and utilization of data-driven tools.
-  **Improved Collaboration:**
By embedding features, organizations foster collaboration by allowing team members to access and interact with data insights within their own collaborative environments. This promotes knowledge sharing, cross-functional collaboration, and collective decision-making, leading to better outcomes and improved productivity.

Enhanced User Experience:

Embedding features provides users with a seamless and unified experience, as they can leverage the power of external tools and functionalities within their familiar application environment. This streamlines workflow, reduces learning curves and increases user satisfaction.

Flexibility and Scalability:

The Embed Feature offers flexibility and scalability by allowing organizations to choose which specific features or components they want to embed. They can select the most relevant and impactful visualizations or Storyboards to embed, ensuring a focused and efficient user experience.

Data Security and Governance:

Embedding features can be done while ensuring data security and governance. Organizations can maintain control over data access permissions, applying role-based access controls to ensure data integrity and compliance with privacy regulations.



3. Embed Storyboard

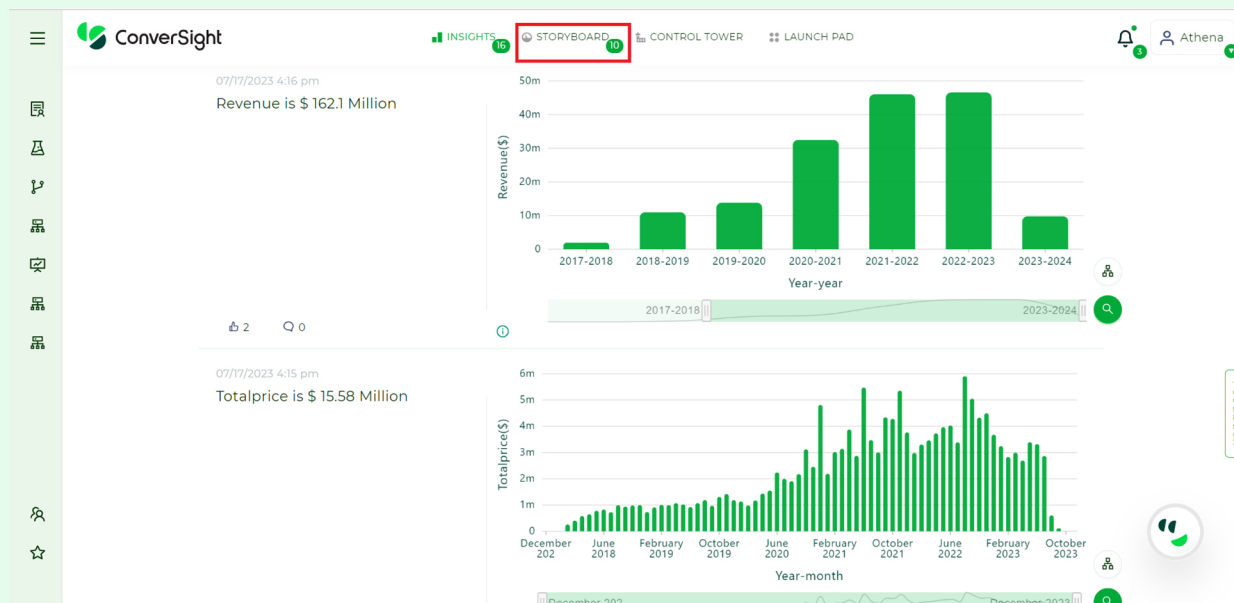
A Storyboard serves as a convenient platform to consolidate and arrange relevant charts, graphs, and insights in one place. It allows easy access to all saved visualizations, which can be “**pinned**” to create a customized display of your data.

The Embed Storyboard feature offers significant benefits when organizations prefer using Athena within their own applications rather than accessing ConverSight directly. By leveraging this feature, users can apply filters to restrict access, tailoring it to specific users and enabling convenient data access from anywhere. This showcases their problem-solving abilities and resourcefulness in overcoming challenges. The Embed Storyboard functionality allows users to seamlessly embed their desired Storyboard into any application of their choice.

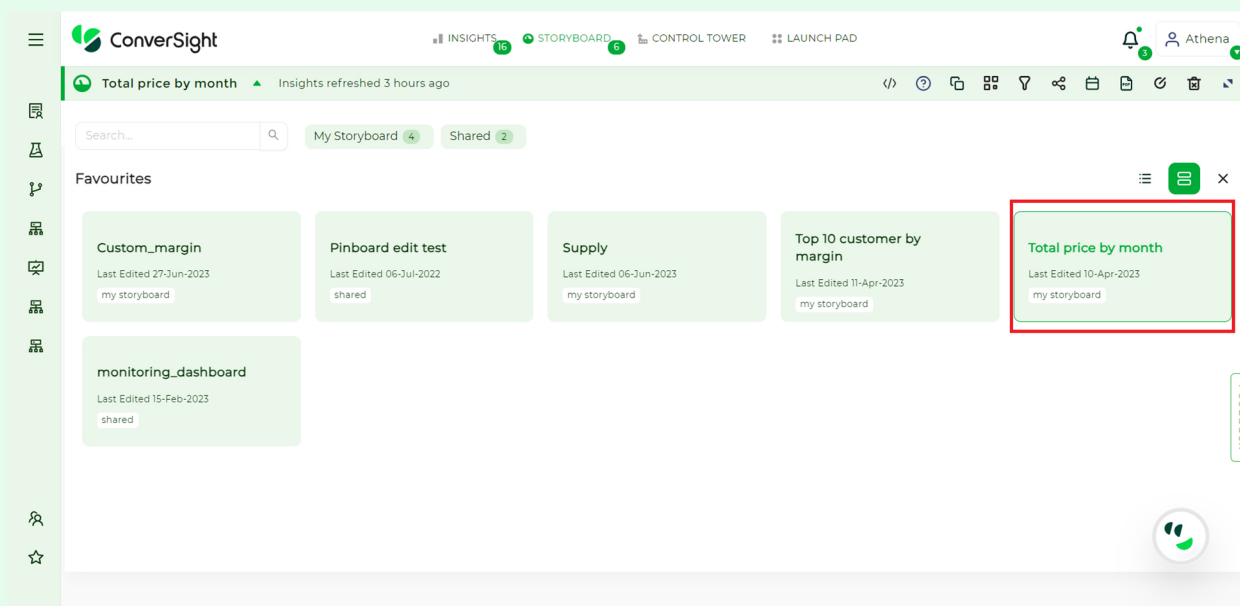
This integration ensures easy accessibility and convenience for viewing the Storyboard within preferred tools or systems. Users can access and interact with their Storyboard on the go, making informed decisions based on real-time data, regardless of their location. To access the Embed Storyboard option, the following steps can be followed.

To Access the Embedded Storyboard.

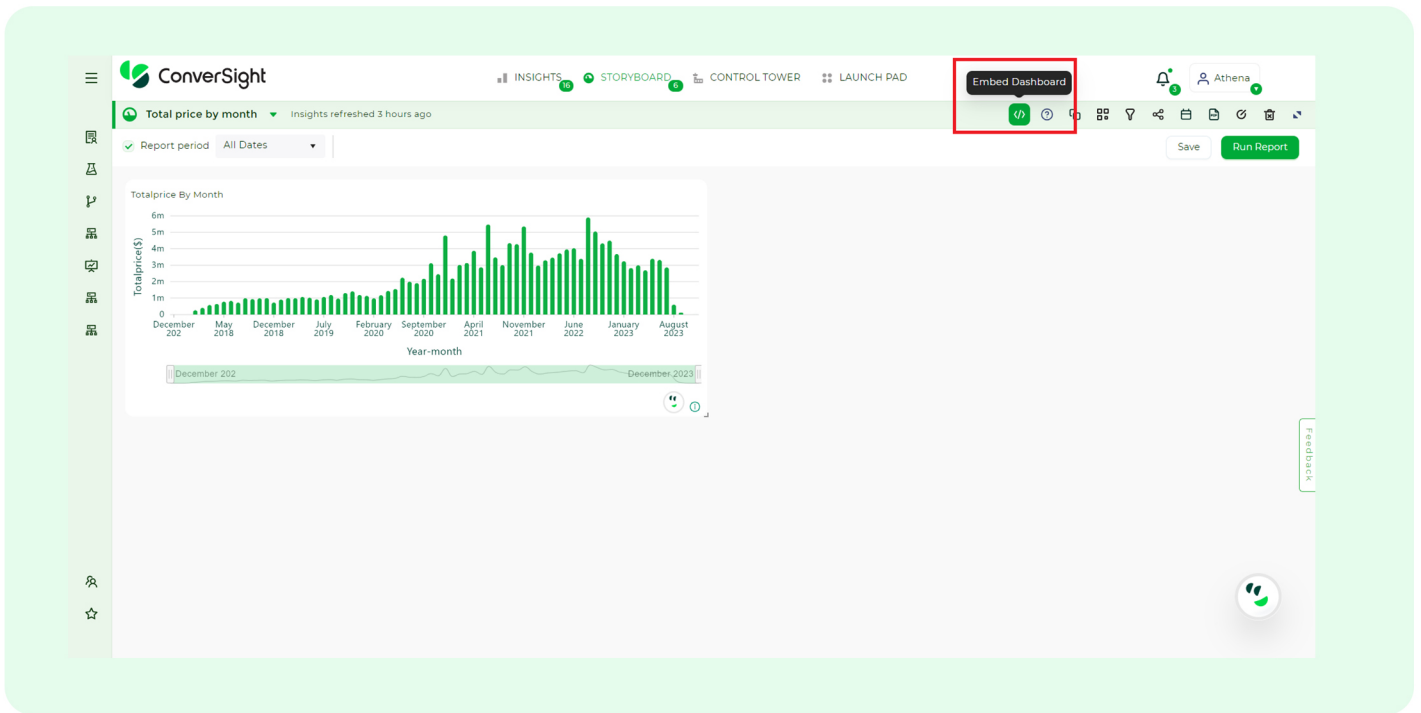
Click on the Storyboard option on the platform.



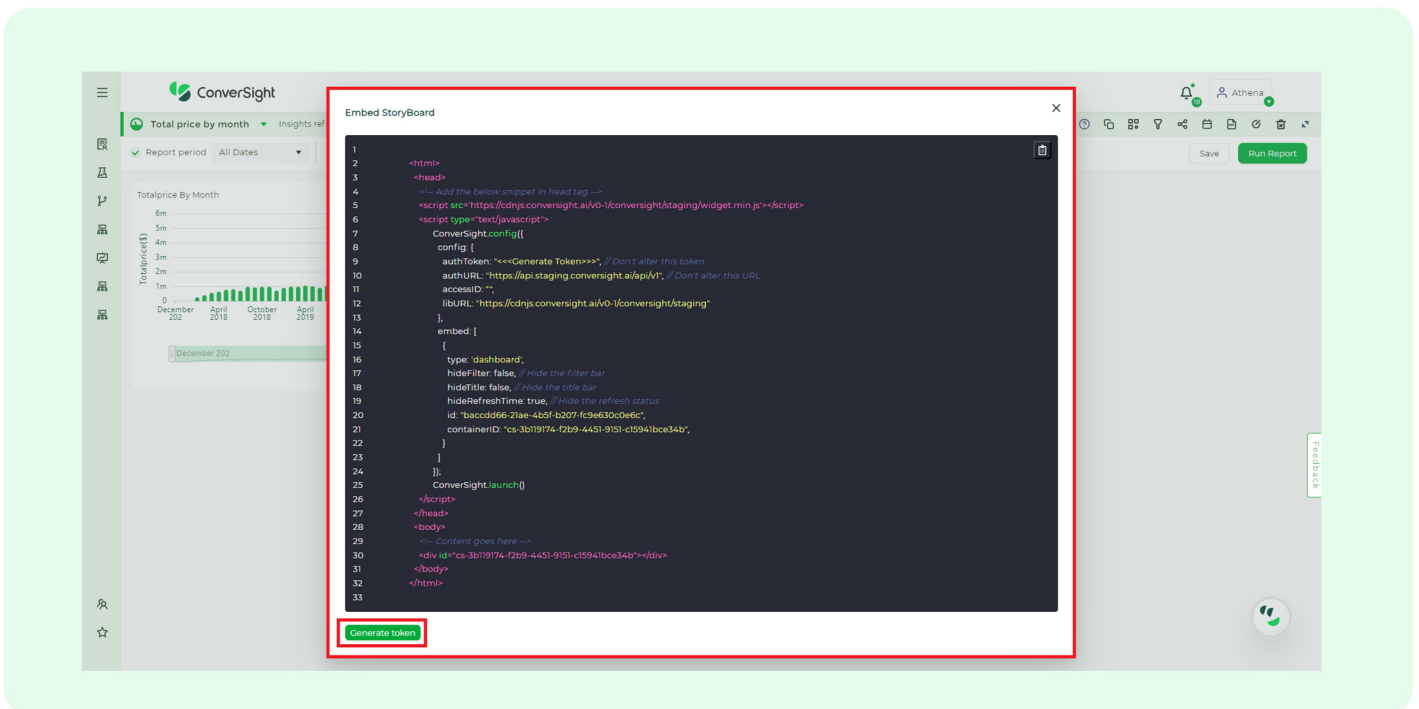
Select one of the desired Storyboards that you would like to embed.



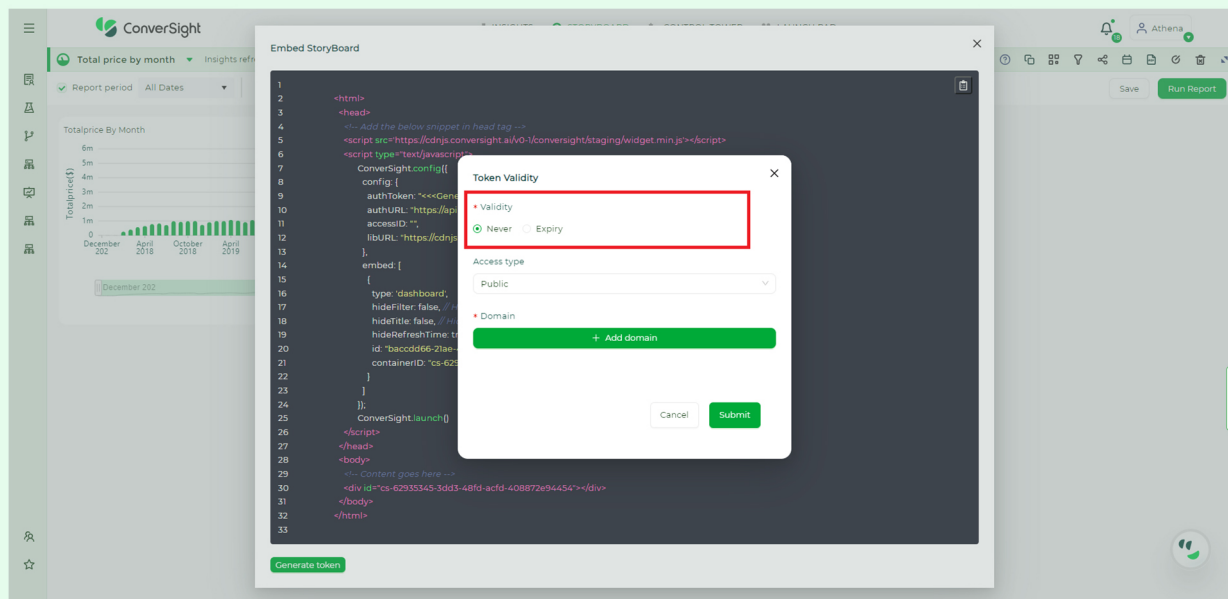
Click on the Embedded Storyboard icon within the desired Storyboard.



You will see the embedded snippet for the Storyboard. To generate the authToken and accessID, simply click on the "Generate Token" button.



- Once you click on the "Generate Token" button, a pop-up will appear, providing options to adjust the token's validity, security access type for the Embedded Storyboard, and the ability to specify the domain where the Embed Storyboard will be embedded.



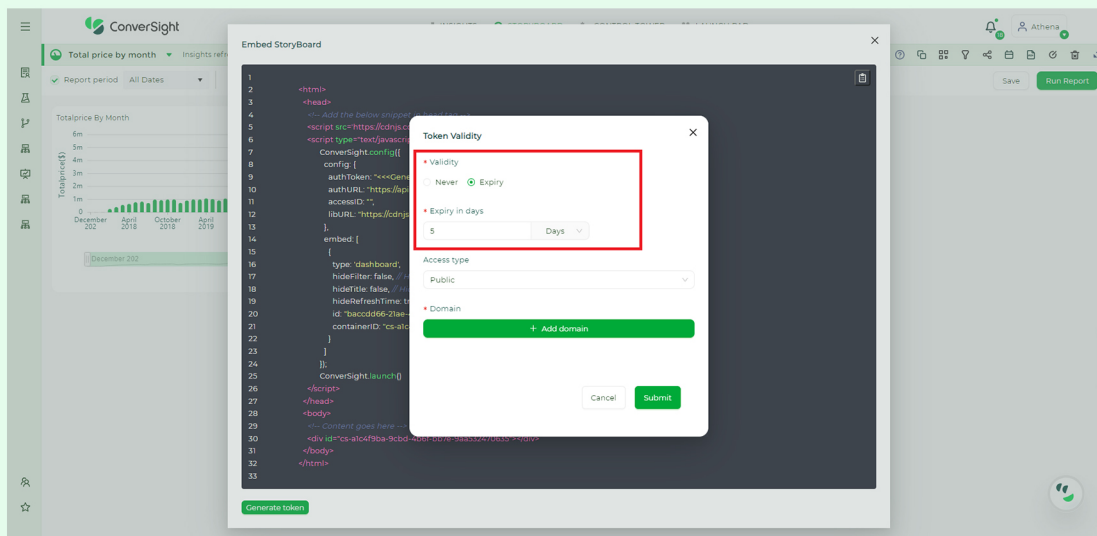
- You can choose the validity of the token from two options: "Never" or "Expiry".

Never:

Selecting the "**Never**" option means that the Storyboard will not have any time constraints. It will remain accessible indefinitely without an expiration date.

Expiry:

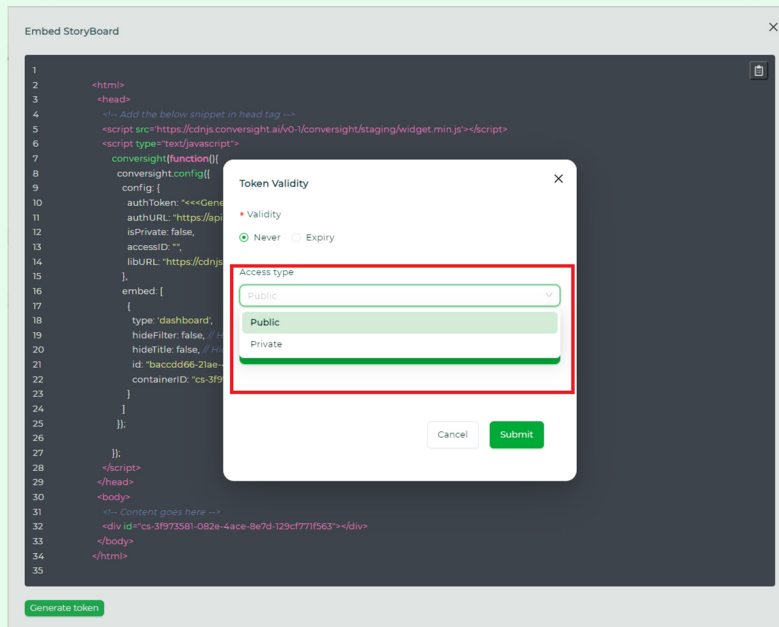
Opting for the "**Expiry**" option allows you to define a specific duration in hours or days, for accessing the Embedded Storyboard. By setting an expiry time, you gain control over the timeframe during which users can access and make use of the designated Storyboard.



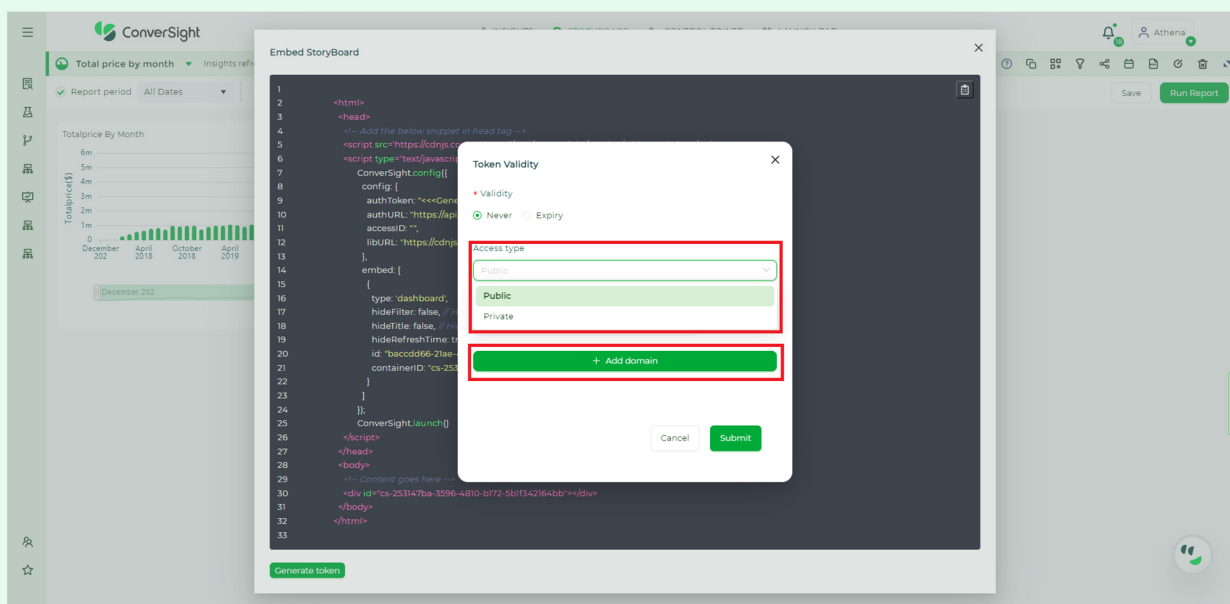
Next, you can choose the security access type as either "Public" or "Private".

When the **"Public"** option is selected, the embedded file will adopt the roles and filters of the user who created it. This means that the users who access the embedded file will have the same rules and filters as the creator.

On the other hand, when the **"Private"** option is selected, it allows accessibility at the user level, depending on the roles assigned to them. This allows for more personalized and tailored access control, granting specific roles and filters based on the needs and permissions of each user.



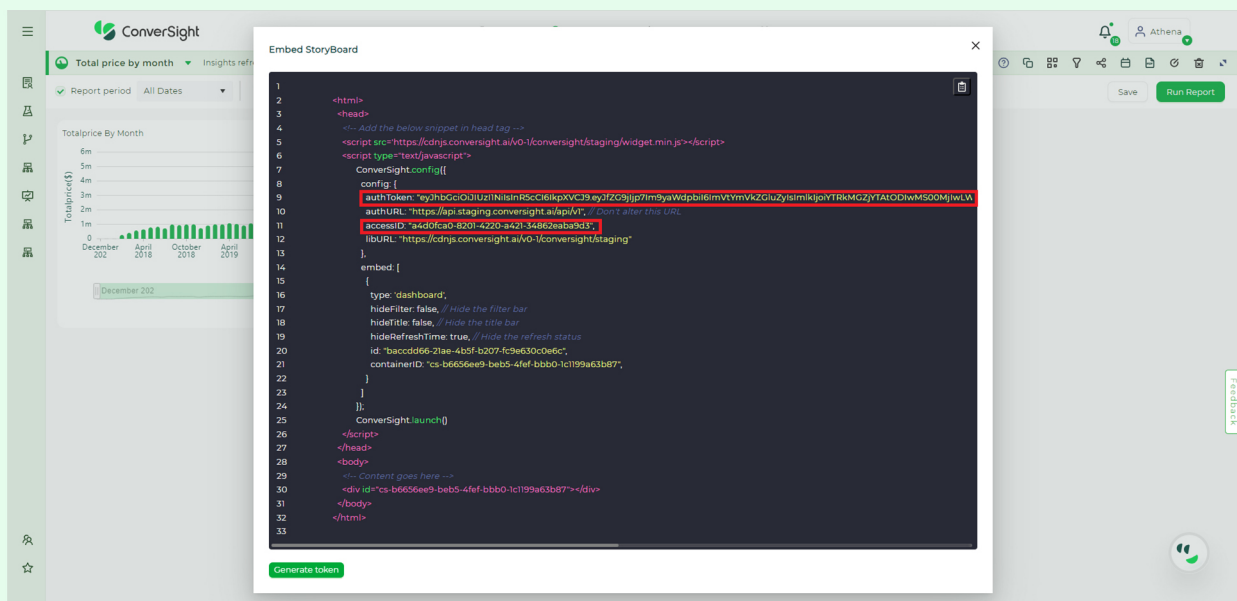
Choose the domain where the embedded file will be utilized. While users have the flexibility to include multiple domains, it is mandatory to include at least one domain.



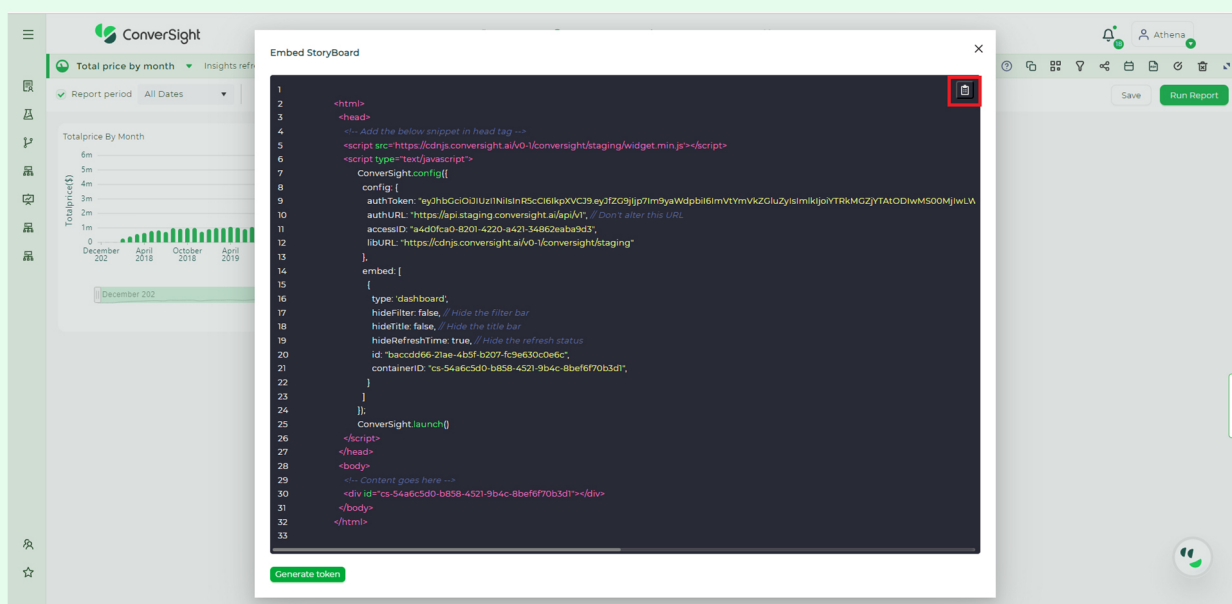
-
- The screenshot displays the ConverSight dashboard interface. On the left, a sidebar contains navigation icons. The main area shows a 'Total price by month' report with a bar chart for December 2022. An 'Embed StoryBoard' dialog box is open, showing a code editor with the following code:
- ```

1 <html>
2
3 <head>
4 <!-- Add the below snippet in head tag -->
5 <script src="https://cdnjs.co
6 <script type="text/javascript">
7 ConverSight.config({
8 config: {
9 authToken: "<<<Gen
10 authDomain: "https://api
11 accessID: ""
12 libURL: "https://cdnjs
13 }
14 embed: [
15 {
16 type: "dashboard",
17 hideFilter: false, //
18 hideTitle: false, //
19 hideRefreshTime: f
20 id: "ba0cdd66-21ae-
21 containerID: "cs-2d
22 }
23]
24 });
25 ConverSight.launch();
26 }
27 </script>
28 </head>
29 <!-- Content goes here -->
30 <div id="cs-2d45eb23-fc00-42b7-a45b-fb5f5dbb1c40"></div>
31 </body>
32 </html>
33

```
- The 'Token Validity' section in the dialog box includes a 'Validity' dropdown set to 'Never', an 'Access type' dropdown set to 'Public', and a 'Domain' input field containing 'sample.com'. A '+ Add domain' button is located below the domain input. The 'Submit' button is highlighted with a red box.



- 🟢 To copy the snippet, you can easily click on the Copy icon, which will automatically copy the code to the user's clipboard.



The method of integrating the Embedded Storyboard snippet into the customer platform varies depending on the selected security access type.

- **Embedding Storyboard as Public**
- **Embedding Storyboard as Private**

### 3.1 Embed Storyboard as Public

When the Embed Storyboard is configured as "Public," it automatically adopts the role access permissions assigned by the creators. This implies that every user who interacts with the Storyboard will possess identical role access as the creator. Essentially, the role assignments assigned to the creators extend to all individuals engaging with the Storyboard. This method guarantees consistency and facilitates smooth collaboration, as users can effortlessly comprehend and navigate the Storyboard based on the predefined role access set by the creators.

#### 🟢 **Transparency and Inclusivity:**

By making the Storyboard accessible, it promotes transparency within the organization. All members can access and view the valuable insights and information presented in the Storyboard. This inclusivity fosters a sense of collaboration and equal participation among team members.

#### 🟢 **Collaboration and Knowledge Sharing:**

Since the roles and permissions are dependent on the person who created the embedding file, it allows for a flexible and dynamic access control mechanism. Regardless of specific roles or permissions, anyone embedding the file can access and engage with the Storyboard's content. This encourages a culture of knowledge sharing and collaboration, as team members can contribute their perspectives and insights.

### **Flexible Access Control:**

The embedding file allows the creator to determine who can access and interact with the Storyboard. This flexibility enables the creator to share the file selectively or make it available to a wider audience, depending on the intended purpose and target audience of the Storyboard.

### **Consistency:**

By inheriting the role access assigned by the creators, the Embed Storyboard maintains consistency in user roles. This ensures that all users interacting with the storyboard have the same role access as the creator, creating a unified experience.

### **Simplified User Experience:**

With predefined role access, users can quickly grasp their permissions and functionalities within the Embed Storyboard. This simplifies the user experience, allowing users to focus on interpreting and utilizing the Storyboard's content rather than navigating complex access controls.

#### **3.1.1 Embedding Steps for Public Access**

Integrating the Embed Storyboard as **"Public"** is easier than integrating it as **"Private."** In the **"Public"** access mode, you can directly integrate the provided code into the customer platform after selecting the validity period and generating the token. This integration process does not require any modifications, making it a straightforward procedure.


### **3.2 Embed Storyboard as Private**

In a **"Private"** security setting, the access to the Storyboard is managed at the user level, utilizing assigned filter values and column names within the embedded snippet. These values are determined by the user token generated on the customer's side through the user provision API, which is then integrated into their own tool.

Each user is assigned specific roles that dictate their access rights to different Storyboards within the organization. Consequently, users will have varying levels of access to Storyboards based on their assigned filter values and column name permissions.

#### **3.2.1 Embedding Steps for Private Access**

Below are the steps to integrate the generated Embed Storyboard snippet into the customer platform when the access type is set as **"Private"**.

-  Integrate the provided code snippet into the customer-designated platform, ensuring that the ConverSight launch component is uncommented and provided with the User Token as an argument. This User Token serves as the authentication key, granting users the necessary permissions and privileges to access the Embedded Storyboard.

- The User Token is generated using the User Provision API, utilizing the organization token, a unique identifier exclusively generated by the ConverSight system administrator. Each organization is assigned its own distinct Orgtoken, which acts as a crucial authentication key for accessing various organizational functionalities and resources. The Access ID generated from the snippet is also utilized in this process.
- To generate the user token, it is crucial to provide the required details, such as the dataset and role-specific filters, to the user through the API body. These filters enable the restriction of access to specific columns or the application of conditions to columns. Additionally, they allow for the inclusion of multiple dataset access for a single user. By providing these details, appropriate access and permissions are ensured for users within the system.

### Use Provision Request:

URL: <https://app.conversight.ai/api/v1/user/provision?token=<<Org AccessToken>>>

#### Request:

```
{
 "expiry": {
 "frequency": "days",
 "value": 1
 },
 "email": "<<email>>",
 "firstName": "<<firstName>>",
 "lastName": "<<lastName>>",
 "displayName": "<<displayName/Alias>>",
 "accessID": "<<accessID>>",
 "roles": [
 {
 "name": "<<roleName>>",
 "dataset": "<<datasetID>>",
 "filters": [
 {
 "column": "<<columnName>>",
 "operator": "<<operator>>",
 "value": [
 "<<valuesToFilter>>"
]
 }
]
 }
]
}
```

#### Response:

##### Success Response:

HTTP Status code -> 200

```
{
 "status": "success",
 "data": {
 "token": "<<userLevelAccessToken>>",
 "id": "<<userID>>"
 }
}
```

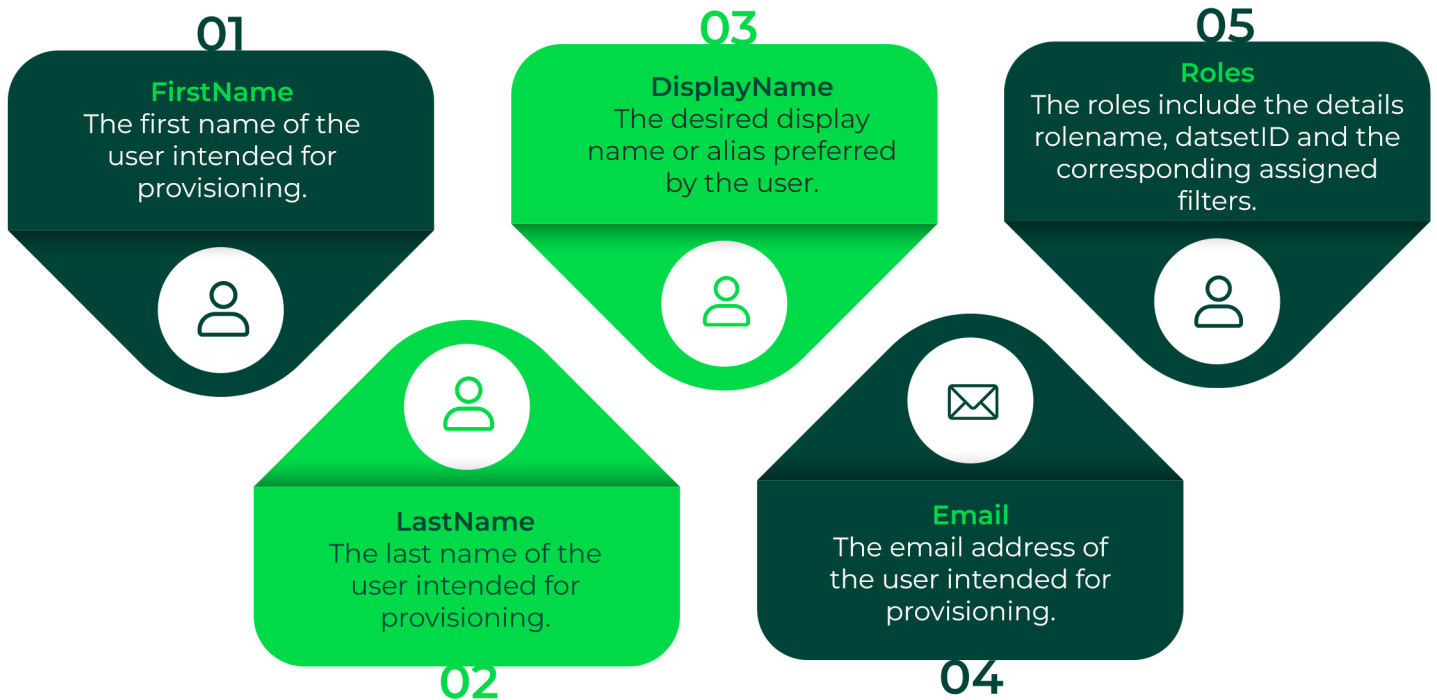
##### Failure Response:

HTTP Error code -> 401, 400, 403, 500

```
{
 "status": "failed",
 "error": "<<errorMessage>>"
}
```



## The provided HTTP request mandates certain fields



Additionally, the filter in the roles is an optional field. If left empty, the user will be granted full access. It is important to note that the details within the request should remain unaltered.

Furthermore, when generating the token, ensure to include the accessID that is generated.

**Note: The User Provision API is used for user access creation and updates.**

- Upon receiving a response from the User Provision API, an access token and User ID are provided. These generated tokens should be securely stored within the customer platform for future usage. The user token obtained from the response should be passed as an argument in the `ConverSight.launch(<<user token>>)` method within the snippet. This ensures that the user is authenticated and granted appropriate access to the embedded functionality within the ConverSight platform.

**Note: If the frequency is set as Never then the value will be -1.**

- After successfully integrating the snippet, users can initiate the launch of Storyboards directly from the customer platform. If a user does not have an existing account with ConverSight, an account can be created either directly on the ConverSight platform or by utilizing their API from the customer's platform, along with their filter values for roles and datasets. Once the account is created, users gain the ability to access and interact with the Storyboard directly from their own platform, providing a seamless experience.

### 3.2.2 User-Level Access Control in Private Embedding

In a **"Private"** security setting, access to the Storyboard is meticulously managed at the user level. This is accomplished through assigned filter values and column names within the embedded snippet. The user token, generated via the customer's side using the user provision API, is seamlessly integrated into their own tool. Within this framework, each user is assigned specific roles that determine their access rights to different Storyboards within the organization. Consequently, users will have varying levels of access to Storyboards based on their assigned filter values and column name permissions.

#### Advantages of User-Level Access Control:

##### **Enhanced Data Security**

User-level access control ensures that sensitive information remains secure. By limiting access to specific Storyboards based on roles and assigned filter values, data privacy, security, and confidentiality are upheld. This prevents unauthorized access to sensitive information and functionalities, reducing the risk of data breaches.

##### **Customized User Experience**

Each user is granted access to Storyboards that are relevant to their specific roles and responsibilities. This tailored user experience allows individuals to focus on the information and functionalities that matter most to their work. By streamlining access, users can efficiently navigate and interact with the Storyboards, enhancing productivity.

##### **Data Integrity and Accuracy**

By assigning specific filter values and column name permissions, user-level access control helps maintain data integrity. Users only have access to the data that aligns with their roles and assigned filters, ensuring that they view accurate and relevant information within the Storyboards.

##### **Regulatory Compliance**

User-level access control aids organizations in meeting regulatory compliance requirements. By restricting access to sensitive information and implementing proper access controls, organizations can demonstrate compliance with data protection regulations and standards.

##### **Simplified Administration**

Assigning roles and filter values at the user level simplifies administration and access management. System administrators can easily allocate appropriate access rights to users, reducing administrative overhead and ensuring efficient access control management.



## 4. Future Expansion: Embedding Webchat

As part of future expansion plans, consider integrating Webchat functionality into other environments. This enables real-time communication, collaboration, and personalized assistance within the platform. Users can interact, ask questions and exchange insights seamlessly, fostering a dynamic and engaging user experience.

Embedding Webchat within other platforms offers several advantages. Mainly, it enables instant and efficient communication between users, eliminating the need to switch between multiple platforms or tools. This streamlined workflow enhances productivity and saves valuable time.



## 5. Conclusion

In conclusion, embedding concepts within a platform is a transformative approach that empowers organizations to unlock new possibilities and drive meaningful outcomes. The advantages are clear, whether it's Embedding Storyboards, Webchat functionality, or other interactive elements. Embedding enhances collaboration, communication, and knowledge sharing, fostering a dynamic and engaging user experience. By providing seamless access to valuable information, organizations can make data-driven decisions and drive innovation. User-level access control ensures data security, privacy and compliance while delivering a customized experience tailored to individual roles and responsibilities. The power of embedding lies in its ability to streamline workflows, enhance productivity, and create a cohesive ecosystem where users can thrive. As organizations continue to embrace embedding, they will unlock new levels of efficiency, collaboration and success in the digital age.

## Join our customers who have accelerated growth with ConverSight



[Request a demo](#)

### About ConverSight

ConverSight's Adaptive Analytics platform uses conversational AI, Natural Language Processing and machine learning to converge the distance between humans and data through data stories, presenting the meaning of data in the most effective, personalized and efficient form possible. ConverSight's patented AI business assistant, Athena, connects distributed databases to answer questions and Augment the consumers through 4 key functions: Information on demand, Automated Story Telling, Proactive Insights, and Recommended Actions.

For more information, visit [www.conversight.ai](http://www.conversight.ai)

