

# Embedding ConverSight Storyboards

Seamless Integration for Data Excellence.





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# I. Introduction

In a world where efficiency and immediate insights are crucial to organizational success, the embeddable feature stands out as a vital asset. At ConverSight, we focus on enhancing accessibility by enabling the embedding of Storyboards into external platforms. This seamless integration eliminates the need for frequent switching between applications, ensuring effortless access and convenience. Users are empowered to interact with Storyboards from various locations, promoting quick, informed decision-making on the move. This datasheet explores two distinct security access types available within the Embed Storyboard feature, each tailored to specific needs — whether fostering transparency and collaboration or enforcing strict access controls to safeguard data privacy and security. Let's delve deeper into the Embed Storyboard feature to understand its potential for improving your organization's data usage and accessibility.

## 2. Accessing Embed Storyboard

The **'Embed Storyboard'** feature within ConverSight is crafted to enable users to effortlessly integrate and showcase Storyboards within their applications. This integration ensures convenient access and viewing of pinned Insights within the Storyboard, fostering seamless interaction. This functionality proves especially beneficial for organizations whose members prefer utilizing ConverSight's Storyboards within their tools rather than directly accessing the ConverSight platform. Let's delve into the steps for accessing the Embed Storyboard feature within the ConverSight platform.

👉 Click on the **'Storyboard'** option on the platform.

The screenshot shows the ConverSight platform interface. The navigation menu at the top includes 'INSIGHTS', 'EXPLORER', 'STORYBOARD' (highlighted with a red box), 'CONTROL TOWER', 'MARKET SPACE', and 'APPS SPACE'. The main content area displays a dashboard with various insights, a table of sales data, and a text block titled 'Unpredictable Changes: The Impact of Volume Fluctuations on Our Warehouse and Profits'.

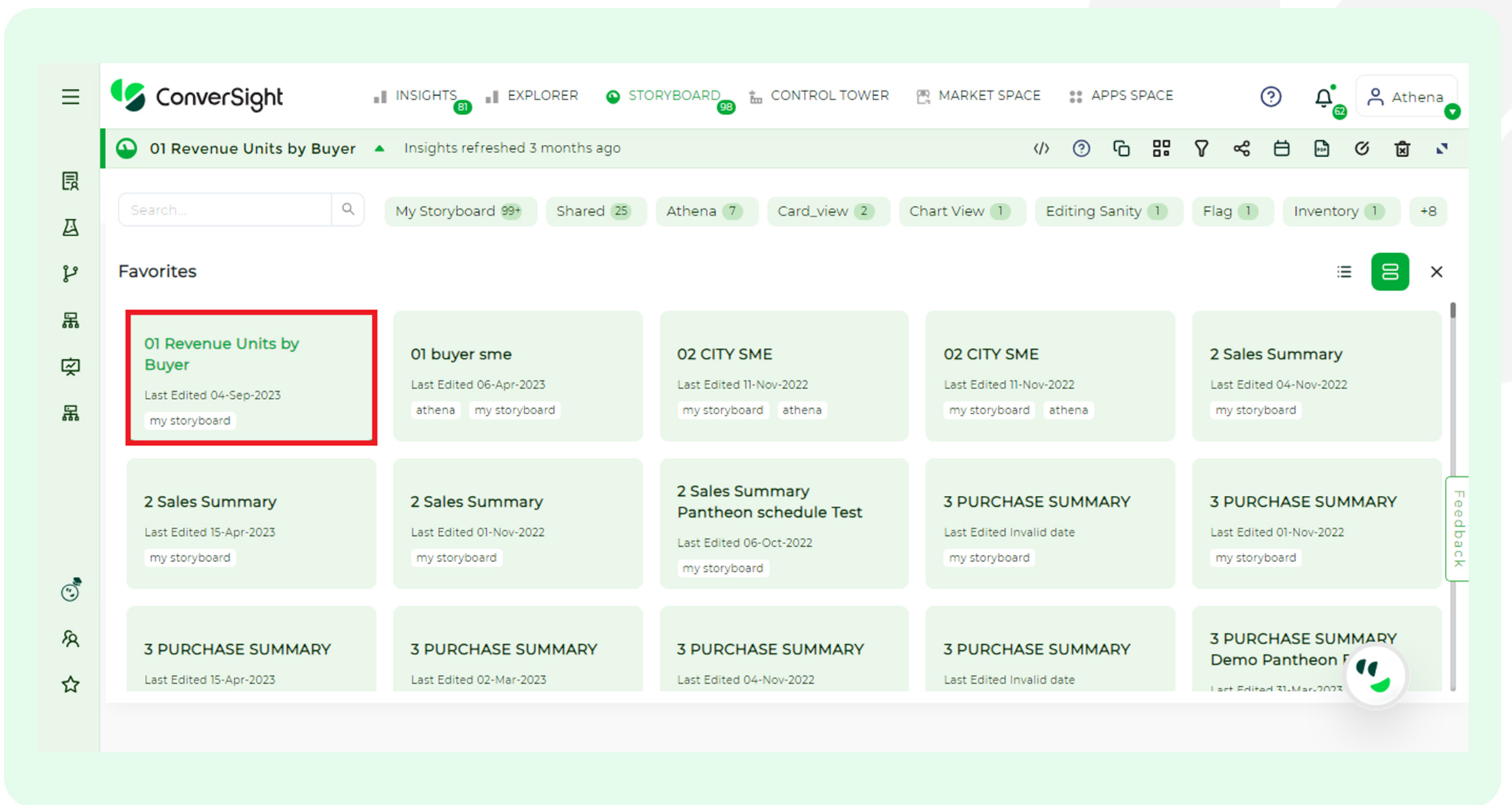
YEAR-MONTH	PRODUCT	SALES
		\$288,340.13
September 2022	720151 - 1810	\$36,277.44
September 2022	Standard Labor	\$480.00
September 2022	101223	\$4,416.00
September 2022	100956	\$5,299.20
September 2022	Freight Charge - Mavpak Stock (Local)	\$487.52
October 2022	720151 - 1810	\$44,660.48
October 2022	Standard Labor	\$600.00
October 2022	101223	\$2,208.00

**Unpredictable Changes: The Impact of Volume Fluctuations on Our Warehouse and Profits**

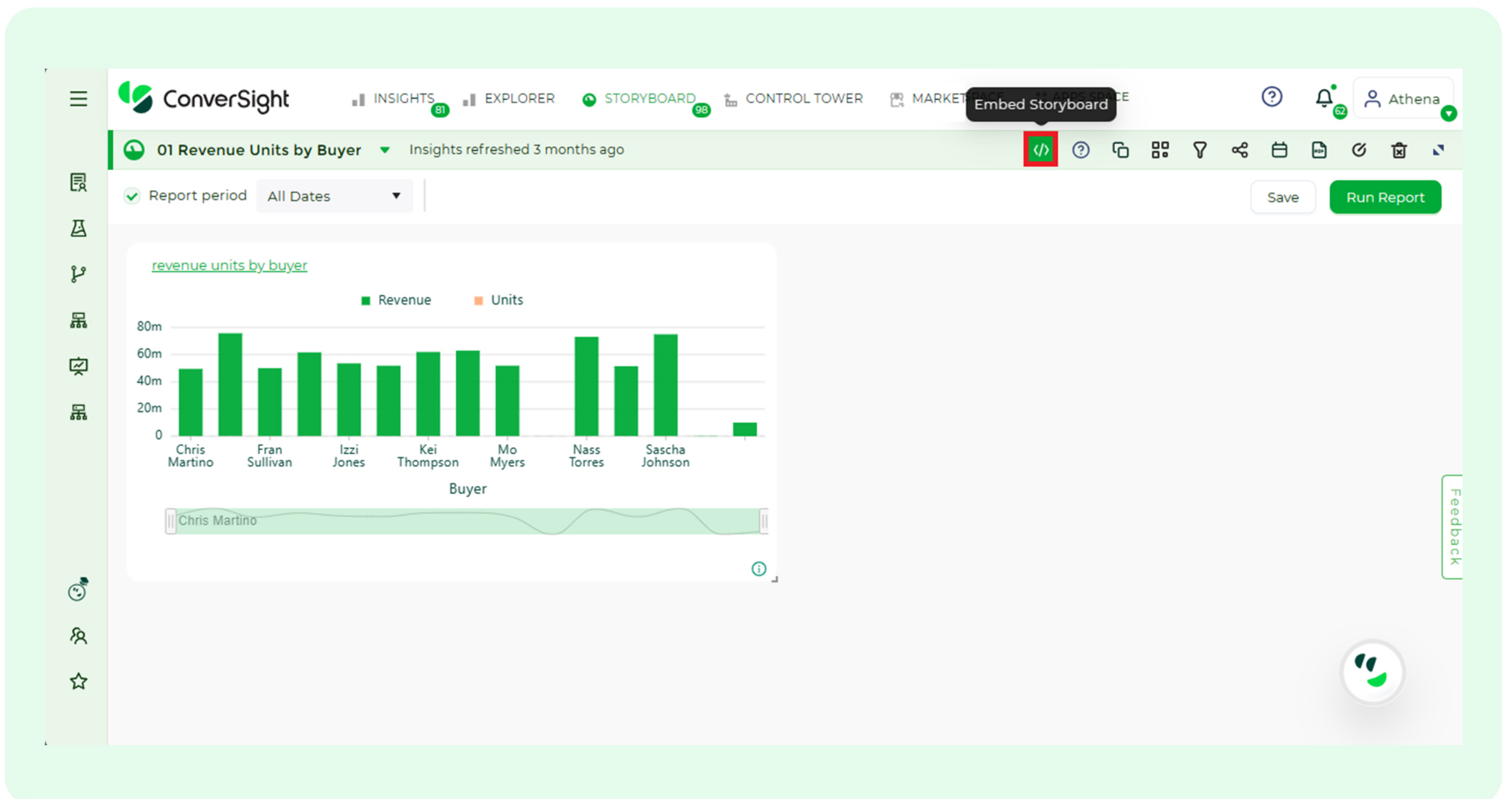
The product with ID 19498020 experienced a sudden increase in volume during September 2023. On the other hand, product 19414021 has seen a significant decrease in volume over the past few months. Our main warehouse currently holds a total value of \$6.89 million. These fluctuations in volume may have an impact on our overall profits and inventory management.

👉 Select the Storyboard you want to embed.



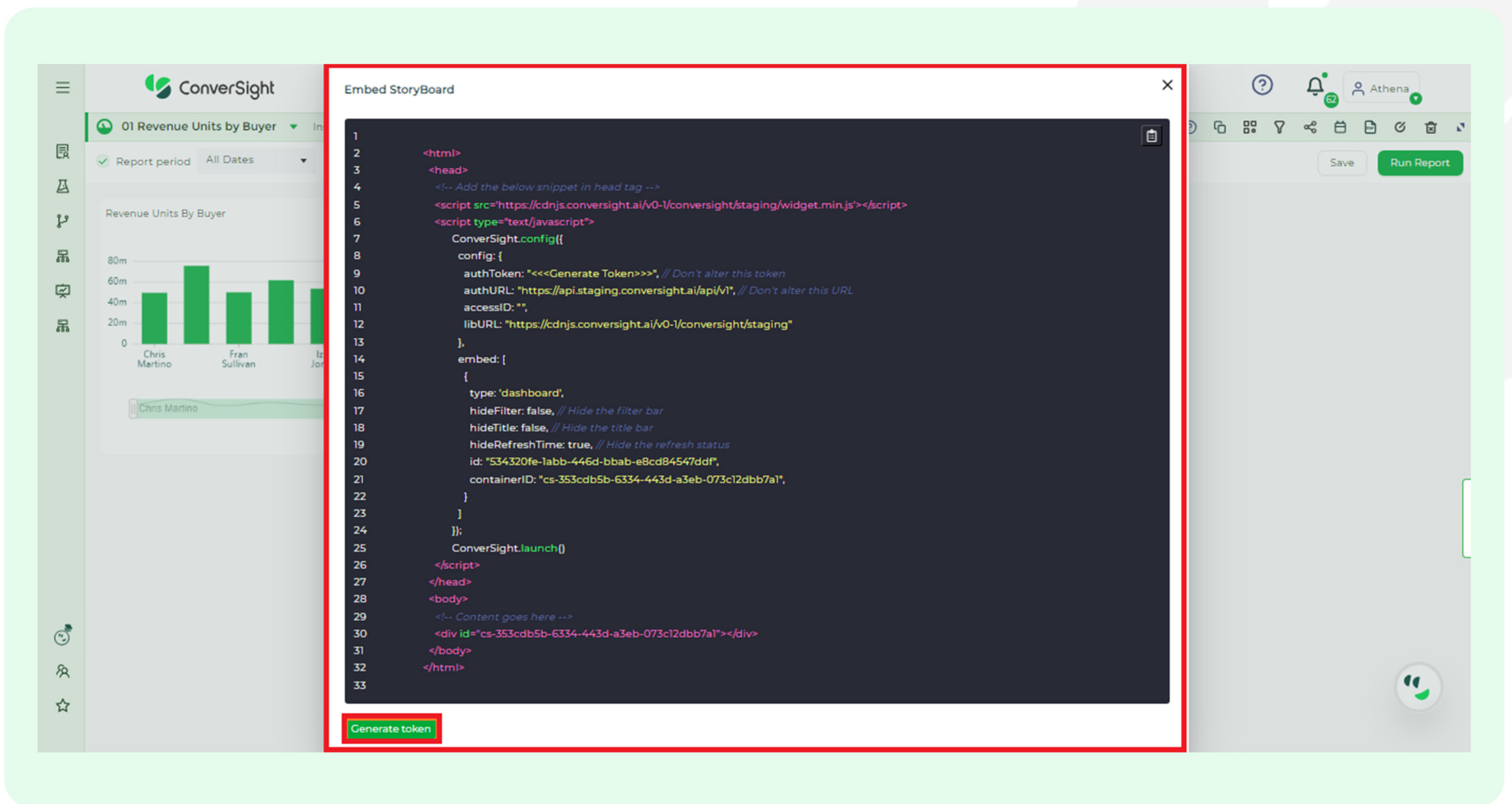


Next, click on the **'Embed Storyboard'** icon located in the menu within the desired Storyboard.



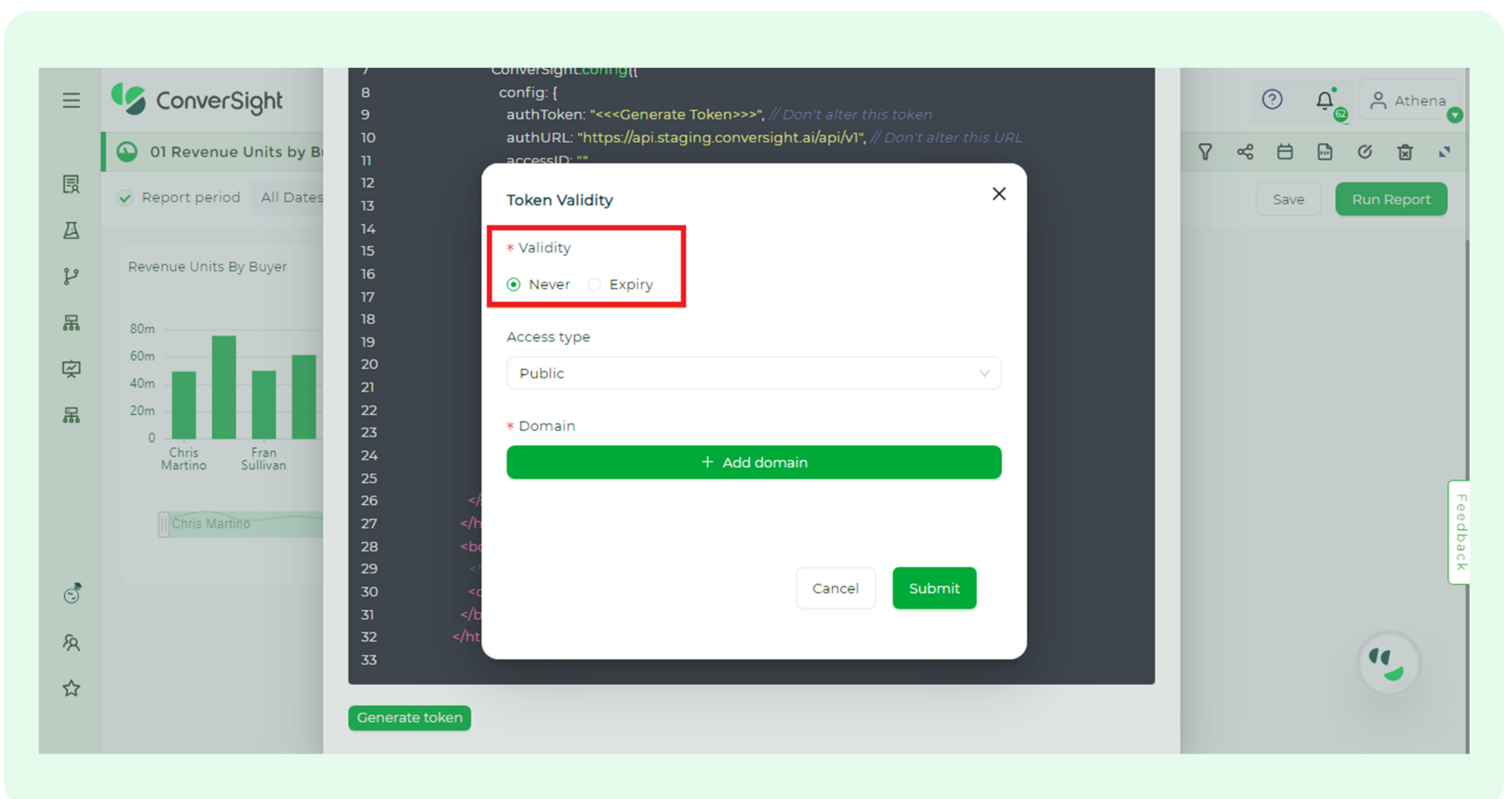
After clicking the Embed icon, a snippet of the Storyboard will appear. To generate the authToken and accessID, simply click on the **'Generate Token'** button.





While on the '**Generate Token**' page, you have the flexibility to choose the validity period for the Storyboard by selecting one of the following options:

- 🟢 **Never:** By choosing '**Never**', the Storyboard will remain accessible indefinitely, without any time constraints or an expiration date.
- 🟢 **Expiry:** If you opt for the '**Expiry**' option, you can specify a particular duration in days, weeks or months for accessing the Embedd Storyboard. This allows you to exercise control over the timeframe within which users can access and utilize the designated Storyboard.



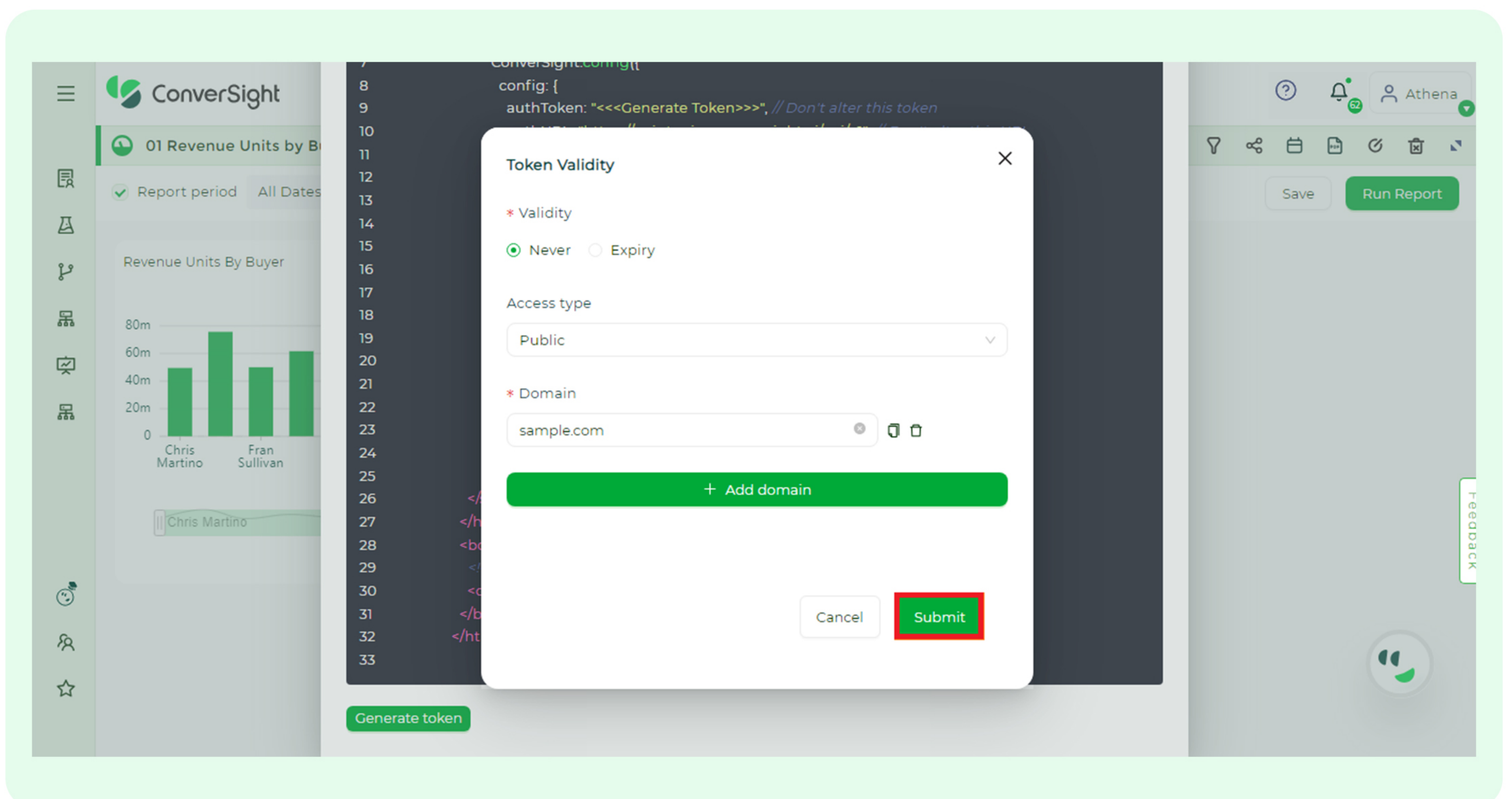


- Next choose the Access Type as either **'Public'** or **'Private'**.

If you choose the **'Public'** option, the embedded file will mirror the roles and filters of its creator, ensuring that those who access it will inherit the same roles and filters as the file's originator.

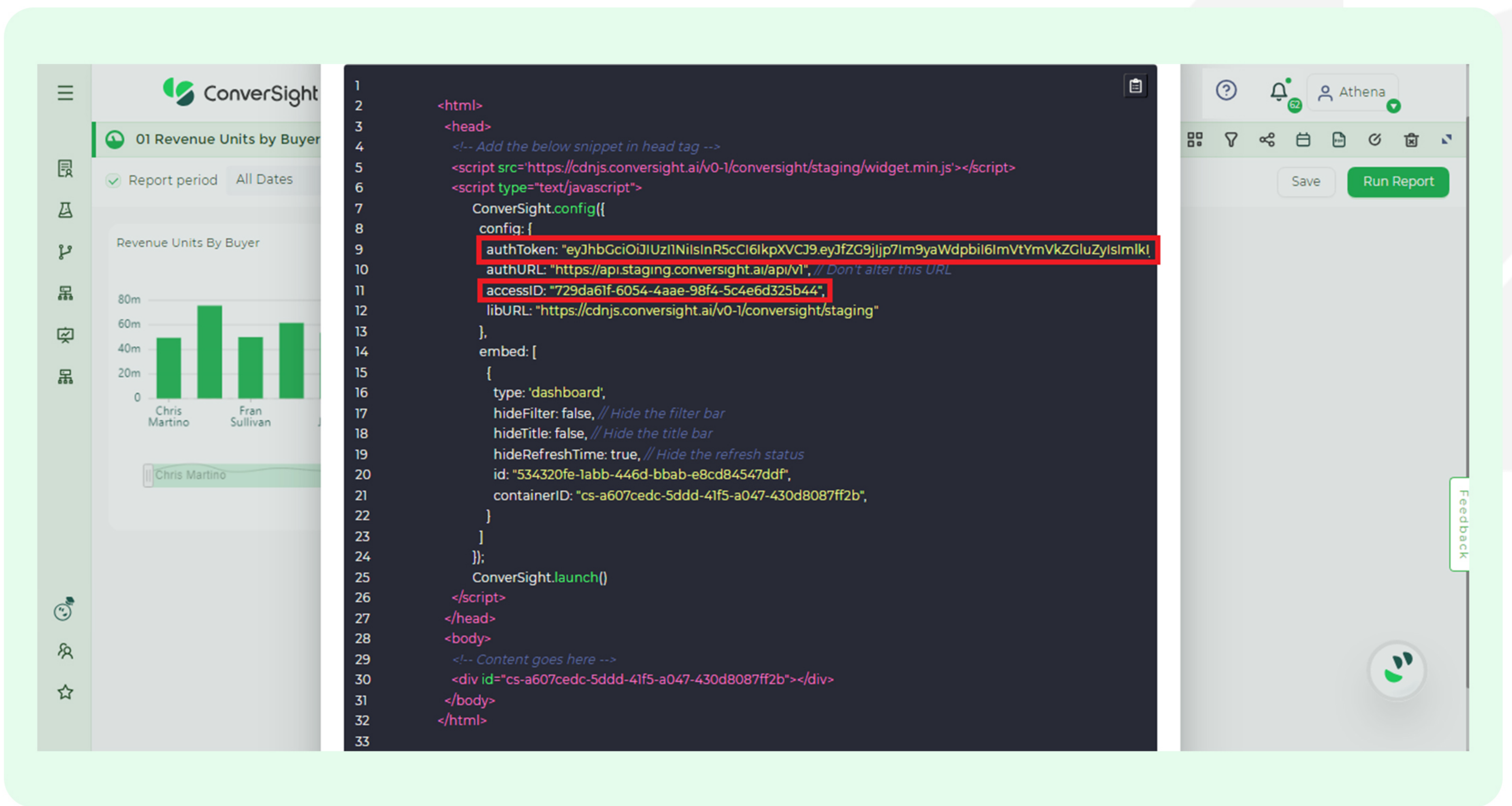
In contrast, selecting the **'Private'** option enables user-level accessibility, where access is contingent upon assigned roles. This tailored approach offers personalized access control, granting distinct roles and filters based on individual user needs and permissions.

- Select the domain where the embedded file will be utilized. Users must be sure to specify at least one domain by clicking on the **'Add domain'** option.

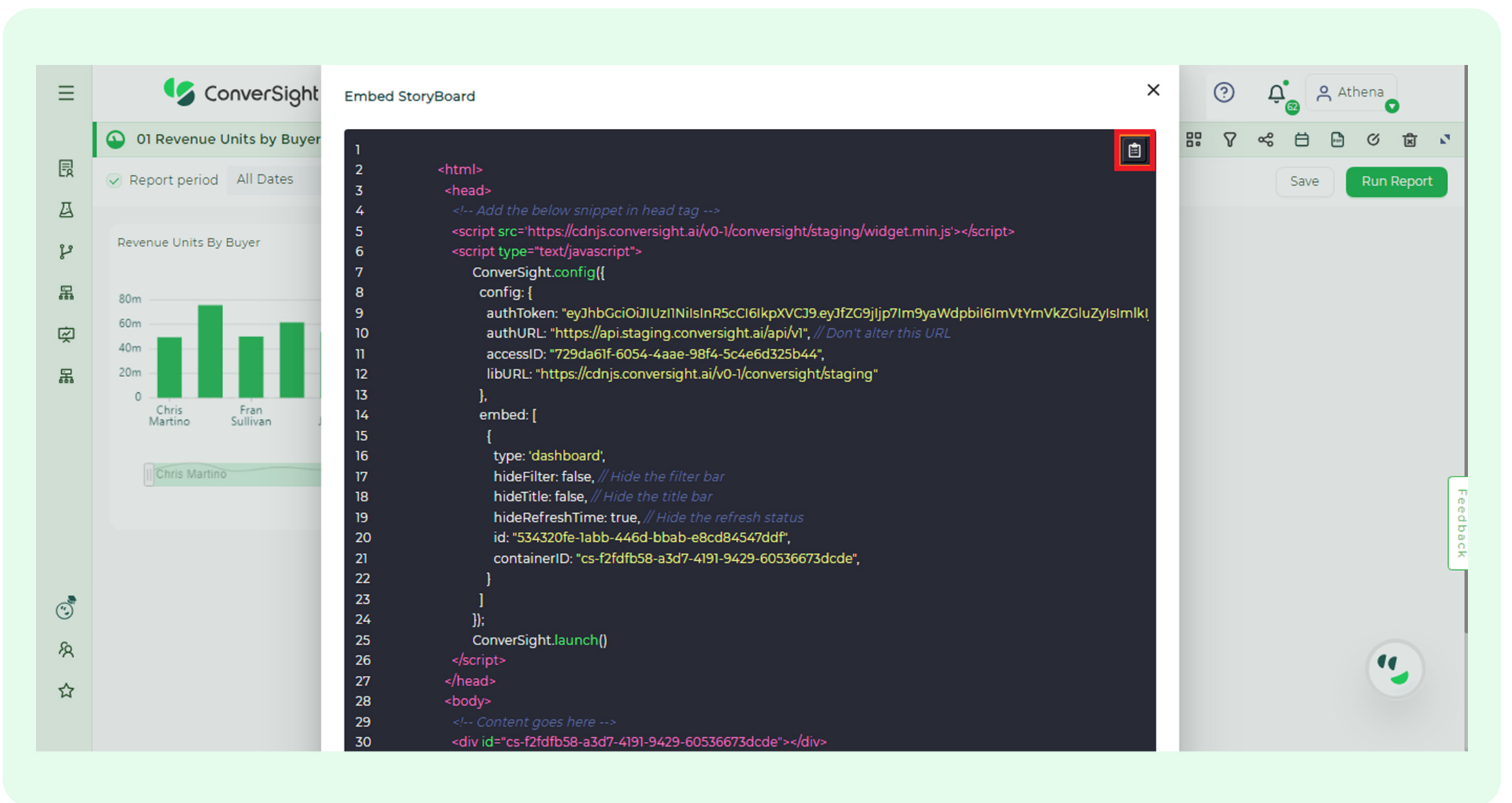


- Click on the **'Submit'** button to generate the authToken and accessID within the snippet.





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







## 2.1 Embedding Storyboard as Public

When the security access type is set as **'Public'**, access to the storyboard is extended to anyone who possesses the embedding file. The role and permissions associated with the individual who created the embedding file will be applied. This approach facilitates transparency, inclusivity and collaboration within the organization.

Integrating the Embed Storyboard as **'Public'** is simpler than as **'Private'**. With the **'Public'** access type, you can directly integrate the provided code into the customer platform after setting the validity period and generating the token. This integration process is straightforward and doesn't require modifications. After integration, users can seamlessly launch Storyboards from their platform, ensuring an uninterrupted and direct access experience.



## 2.2 Embedding Storyboard as Private

Within the ConverSight platform, precise control over Storyboard access is meticulously maintained, tailoring it to individual user requirements. Access to embedded content is solely provided to individuals with authorized roles and permissions, guaranteeing the safeguarding of sensitive data and promoting smooth collaboration. This involves the creation of a unique user token using our organization-specific API, complete with customized column filters and a dataset ID aligned with the user's specific restrictions. Before embedding in external applications, it's imperative to incorporate this user token into the embedding snippet. This fine-grained user-level control significantly bolsters data security, customization and adherence to regulatory requirements. For Private security access, Storyboard accessibility in ConverSight is user-centric, relying on assigned filter values and column names integrated within the embedded snippet. These specific values are determined by the User Token, generated on the customer's end using the User Provision API and seamlessly incorporated into their tools. Users are allocated distinct roles that govern their access privileges to various Storyboards within the organization, ensuring variable levels of access commensurate with their permissions.

Ensure the seamless inclusion of the given code snippet into the desired platform specified by the customer. Be sure to uncomment the ConverSight launch component and provide the User Token as an argument. This User Token functions as the authentication key, granting users the essential permissions and privileges required to access the Embedded Storyboard. You can generate a token through the user provision API.

To create the user token, it is crucial to provide specific details, such as dataset specifications and filters tailored to the user's roles, in the API request body. These filters empower you to control access to particular columns and apply conditions as necessary. Additionally, they offer the flexibility to grant a single user access to multiple datasets. These details are pivotal in ensuring that the user is granted precise and well-defined access rights and permissions within the system.



## User Provision API

User Provision API is a software interface that allows you to manage and control user accounts and their access to a system or application. It provides a way to create, modify or delete user profiles within your software. This API helps ensure that users have the right permissions and access levels to use your application or service securely.

### Note

The User Provision API is utilized to create and update user access.

**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>>",
      "configuration": {
        "currency": "<<currency>>",
        "financialOffset": <<num>>
      }
    }
  ]
}
```



```
"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 HTTP request given requires specific fields to be included.

- 🟢 **firstName:** The first name of the user intended for provisioning.
- 🟢 **lastName:** The last name of the user intended for provisioning.
- 🟢 **displayName:** The desired display name or alias preferred by the user.
- 🟢 **email:** The email address of the user intended for provisioning.
- 🟢 **roles:** Roles include details such as the role name, dataset ID, configurations (including currency format and financial year settings) and the related filters. These role details are crucial for ensuring controlled data visibility and security.

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.

After receiving a response from the User Provision API, it will provide a User Token and a User ID. These generated tokens should be stored securely within the customer's platform for future use. The User Token obtained from the response should be passed as an argument in the '**ConverSight.launch(<< user token >>)**' method within the code snippet. This step ensures user authentication and grants the necessary access to embedded features within the ConverSight platform.

### Note

**If the frequency is set as Never, the value will be -1.**

Following the seamless integration of the code snippet, users gain the capability to initiate storyboard launches directly from their customer platform. If a user doesn't already have an account with ConverSight, they can create one in two ways: either directly on the ConverSight platform or by using their API within the customer's platform, specifying filter values for roles and datasets. Once the account is established, users can effortlessly access and engage with the storyboard from their own platform, ensuring a smooth and uninterrupted user experience. In case of failure responses, users can resolve the error code and address the issue.



Failure Responses	Resolution
<b>400 - Bad Request</b>	Check the syntax of the request, including parameters, headers and request body. Ensure it conforms to the server's expectations.
<b>401 - Unauthorized</b>	Provide valid credentials (e.g., username and password) or authentication token. Ensure the client has the necessary permissions to access the resource.
<b>403 - Forbidden</b>	Check and adjust the permissions on the server. Ensure the client has the necessary rights to access the requested resource.
<b>500 - Internal Server Error</b>	This indicates a server-side issue. Contact ConverSight Admin.

### 3. Conclusion

The Embed Storyboard feature opens a world of enhanced data accessibility and flexibility, catering to the demands of our digital age where real-time insights and efficiency are paramount. This powerful tool seamlessly integrates Storyboards into your applications, offering convenience and accessibility. Whether you choose the Public or Private access type, Embed Storyboard fosters transparency, collaboration, and customized data access. With a unified user experience, it eliminates platform-switching hassles and ensures a smooth, uninterrupted journey for all users.



## Join our customers who have accelerated growth with ConverSight



### 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)

