

How-to – Key Insights

V1.0 -Global Marketing Technology-AEM

Component Name: Key Insights

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1 Document History

The following important changes have been made to this document:

Date	Version #	Description of Changes Made	Author	Approved By
October 10 - 2019	1.0	Initial Draft	Christopher Restino	

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2 Introduction

This document provides “How to Instructions” for the component “Key Insights”.

2.1 Short Description

This component is used to display Key Insights on the Report/Company/Policy/Insurance

Feature Overview

Configuration

- Background Color – Option to choose Background color to be Black/White
- Select Chart Configuration – option to choose one of the following:
 - No chart
 - Key Insights 2 Up
 - Key Insights 3-Up
 - Horizontal Bar Chart
 - Horizontal Stacked Bar Chart

2.2 AEM Component Data Model

Tab	Field Name	Field Group	Field Type	Validation	Accepted values
Configuration	Background Color	Configuration	Drop Down	Mandatory	White/Black
	Select Chart Configuration	Configuration	Drop Down	Mandatory	Key Insights/Key Insights 2 up/ Key Insights 3 up/ Horizontal Bar Chart/ Stacked Bar Chart
	Key Insights Configuration				
	Key Insights Title	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights Description	Configuration	RTE	Optional	Alpha Numeric HTML
	Enable Chart	Configuration	Checkbox	Mandatory	True/False
	Key Insights Number	Configuration	Number field	Optional Max Val. 100	Non-Negative Number up to 100
	Key Insights Number Format	Configuration	Text Field	Optional	Expanded Content Configuration
	Expanded Content Configuration				
	Enable Learn More Content	Configuration	Checkbox	Mandatory	True/False
	Learn More Label	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights Expanded Content	Configuration	RTE	Optional	Alpha Numeric HTML
	Key Insights 2 Up Configuration				
	Key Insights 2 Up Title	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights 2 Up (Number 1)	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
	Key Insights 2 Up (Number 1 Format)	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights 2 Up (Caption 1)	Configuration	RTE	Optional Max Char. 110	Alpha Numeric HTML
	Key Insights 2 Up (Number 2)	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
	Key Insights 2 Up (Number 2 Format)	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights 2 Up (Caption 2)	Configuration	RTE	Optional Max Char. 110	Alpha Numeric HTML
	Key Insights 3 Up Configuration				
	Key Insights 3 Up Title	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights 3 Up (Number 1)	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
	Key Insights 3 Up (Number 1 Format)	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights 3 Up (Caption 1)	Configuration	RTE	Optional Max Char. 110	Alpha Numeric HTML
	Key Insights 3 Up (Number 2)	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
	Key Insights 3 Up (Number 2 Format)	Configuration	Text Field	Optional	Alpha Numeric
	Key Insights 3 Up (Caption 2)	Configuration	RTE	Optional Max Char. 110	Alpha Numeric HTML
	Key Insights 3 Up (Number 3)	Configuration	Number Field	Optional	Non-Negative Number 1 to 100

Key Insights 3 Up (Number 3 Format)	Configuration	Text Field	Optional	Alpha Numeric
Key Insights 3 Up (Caption 3)	Configuration	RTE	Optional Max Char. 110	Alpha Numeric HTML
Extra Content Options	Configuration	Drop Down	Optional	CTA/ Social Sharing/ Non-Extra Content
CTA Configuration				
CTA Text	Configuration	Text Field	Optional Max Char. 13	Alpha Numeric
CTA Path	Configuration	Path Field	Optional	Valid Page path/URL
CTA Open In	Configuration	Drop Down	Optional	Same Page/New Page
Social Configuration				
Enable Social Sharing	Configuration	Checkbox	Mandatory	True/False
Key Insights Social Text	Configuration	Text Field	Optional	Alpha Numeric
Chart Title	Configuration	Text Field	Optional	Alpha Numeric
Disable Chart Legend	Configuration	Checkbox	Mandatory	True/False
Legend Config	Configuration	Multifield Panel	Optional	Adds a legend Item
Legend Title	Configuration	Text field	Optional	Alpha Numeric
Select Legend Key Color	Configuration	Drop Down	Optional	Various Colors for different background options
Horizontal Bar Graph Config	Configuration	Multifield Panel	Optional	Adds a point for the horizontal bar graph
Label	Configuration	Text Field	Optional	Alpha Numeric
Legend Config	Configuration	Dropdown	Optional	Options depend on legend titles
Number Value	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
Number Format	Configuration	Text Field	Optional	Alpha Numeric
Horizontal Stacked Bar Graph Config	Configuration	Multifield Panel	Optional	Adds a point for the horizontal stacked bar graph
Label	Configuration	Text Field	Optional	Alpha Numeric
Legend Config	Configuration	Dropdown	Optional	Options depend on legend titles
First Number Value	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
First Number Format	Configuration	Text Field	Optional	Alpha Numeric
Second Legend Config	Configuration	Dropdown	Optional	Options depend on legend titles
Second Number Value	Configuration	Number Field	Optional	Non-Negative Number 1 to 100
Second Number Format	Configuration	Text Field	Optional	Alpha Numeric

2.3 *Intended Audience*

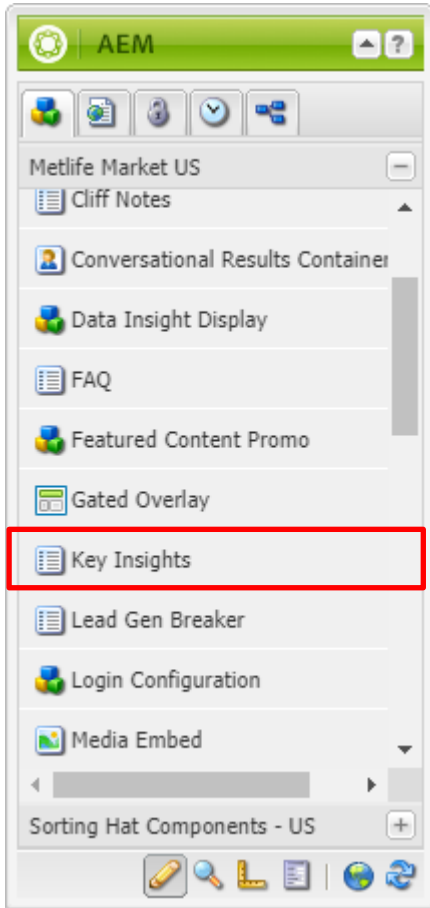
The primary audience of this design is:

- Content Authors
- Agencies
- Marketers

3 How to Enable/Turn-On the Component

This component/feature is available in the sidekick and can be dragged onto any parsys in any standard template

- From Sidekick, select market specific component group then "Key Insights"



4 Component Dialog

- Press edit to open the dialog and begin editing the component fields.

Configuration Tab

This Tab will contain the overall component configurations. The Key insights has 5 variations: Key Insights, Key Insights 2 up, Key Insights 3 up, Horizontal Bar Chart, Horizontal Stacked Bar Chart.

1. Background Color – This dropdown will give user the option to select a black or white background color.
2. Select Chart Configuration – Drop down to select one of the 5 variations.
3. Key Insights Title – If user selects Key Insights this field will show and is for the title of the component.
4. Key Insights Description – If user selects Key Insights this field will show and is a description for the component.
5. Enable Chart – If user selects Key Insights this field is a toggle to show the bar chart
6. Key Insights Number – If user selects Key Insights this field is the number associated with the component
7. Key Insights Number Format – if user selects Key Insights this is the format of the number entered above usually # or %
8. Enable Learn More Content – If user selects Key Insights this is the toggle to enable the learn more content section
9. Learn More Label – if user selects Key Insights this is the label to open the learn more section
10. Key Insights Expanded Content – if user selects Key insights this is the content that will show if learn more label is clicked.
11. Key Insights 2 Up Title- if user selects Key Insights 2 Up this is the title section for the variation
12. Key Insights 2 Up (Number 1) - if user selects Key Insights 2 Up this is the first number.
13. Key Insights 2 Up (Number Format 1) - if user selects Key Insights 2 Up this is the first number format usually # or %.
14. Key Insights 2 Up (Caption 1)- if user selects Key Insights 2 Up this is the caption for the first number section.
15. Key Insights 2 Up (Number 2) - if user selects Key Insights 2 Up this is the first second number.
16. Key Insights 2 Up (Number Format 2) - if user selects Key Insights 2 Up this is the second number format usually # or %.
17. Key Insights 2 Up (Caption 2)- if user selects Key Insights 2 Up this is the caption for the second number section.
18. Key Insights 3 Up Title – if user selects Key Insights 3 Up this is the title section for the variation
19. Key Insights 3 Up (Number 1) - if user selects Key Insights 2 Up this is the first number.
20. Key Insights 3 Up (Number Format 1) - if user selects Key Insights 2 Up this is the first number format usually # or %.
21. Key Insights 3 Up (Caption 1)- if user selects Key Insights 2 Up this is the caption for the first number section.
22. Key Insights 3 Up (Number 2) - if user selects Key Insights 2 Up this is the second number.
23. Key Insights 3 Up (Number Format 2) - if user selects Key Insights 2 Up this is the second number format usually # or %.
24. Key Insights 3 Up (Caption 2)- if user selects Key Insights 2 Up this is the caption for the second number section.
25. Key Insights 3 Up (Number 3) - if user selects Key Insights 2 Up this is the third number.
26. Key Insights 3 Up (Number Format 3) - if user selects Key Insights 2 Up this is the third number format usually # or %.
27. Key Insights 3 Up (Caption 3)- if user selects Key Insights 2 Up this is the caption for the third number section.
28. Extra Content Options – this dropdown will only appear for the Key Insights 2 up and 3 up variations and allows user to choose: No Content, CTA, or Social Sharing
29. CTA Text – if users selects CTA in the extra content options dropdown this field is for the link text of the CTA.
30. CTA Path - if users selects CTA in the extra content options dropdown this field is the redirect URL for the link.
31. CTA Open In - if users selects CTA in the extra content options dropdown this field allows user to select if the link is opened in a new or existing page.
32. Enable Social Sharing - if users selects Social Sharing in the extra content options dropdown this field allows you to turn on social sharing feature. This option is also available for the Key Insights variation as well.
33. Key Insights Social Text – if users selects Social Sharing in the extra content options dropdown this field is used for the text when you click one of the various social platforms to share. This field is also available for the Key Insights variation as well.
34. Chart Title – if user select the Horizontal Bar Chart or Horizontal Stacked Bar Chart options this is the title for these variations
35. Disable Chart Legend – if user select the Horizontal Bar Chart or Horizontal Stacked Bar Chart options this field allows you to disable the legend which is enabled by default
36. Legend Config – if user select the Horizontal Bar Chart or Horizontal Stacked Bar Chart options this is a multiframe panel which will allow you to add legend items.
 - a. Legend Title – The title for the legend key
 - b. Select Legend Key Color – the color you want for this title. The color options change based on background type
37. Horizontal Bar Graph Config – if user selects the Horizontal Bar Chart variation this allows you to add a data point
 - a. Label – description text for data point
 - b. Legend Config – select one of the Legend Config options
 - c. Number Value- number for the data point
 - d. Number Format – number format for the data point usually # or %
38. Horizontal Stacked Bar Graph Config – if user selects Horizontal Stacked Bar Chart variation this allows you to add a data point.

- a. Label – description text for data point
- b. Legend Config – select one of the Legend Config options
- c. First Number Value – number for the first option of data point
- d. First Number Format – number format for the first option of data point
- e. Second Legend Config – select one of the Legend Config options
- f. Second Number Value – number for the second option of data point
- g. Second Number Format – number format for the second option of data point

Key Insights Variation

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Key Insights

Key Insights Configuration

Key Insights Title: [Text Field]

Key Insights Description: [Rich Text Editor]

Enable Chart:
Check to Enable the Key Insights Bar Chart

Key Insights Number: [Text Field]
number of percentage

Key Insights Number Format: [Text Field]
Example #/%

Expanded Content Configuration

Enable Learn More Content:
Check to enable learn more option

Learn More Label: [Text Field]

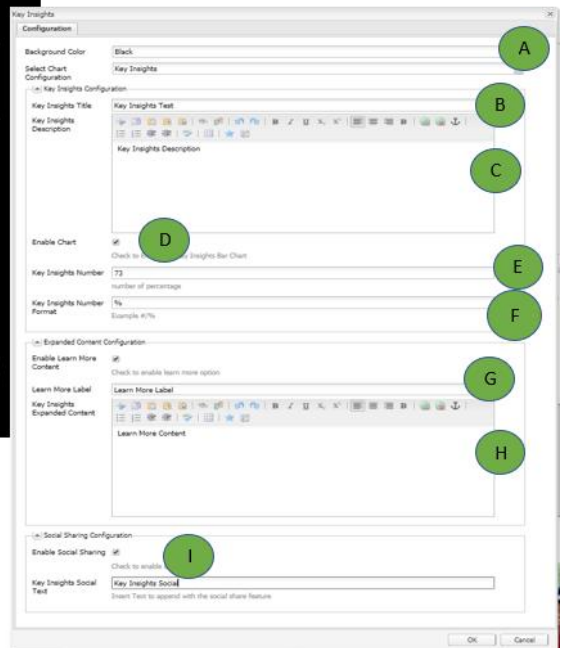
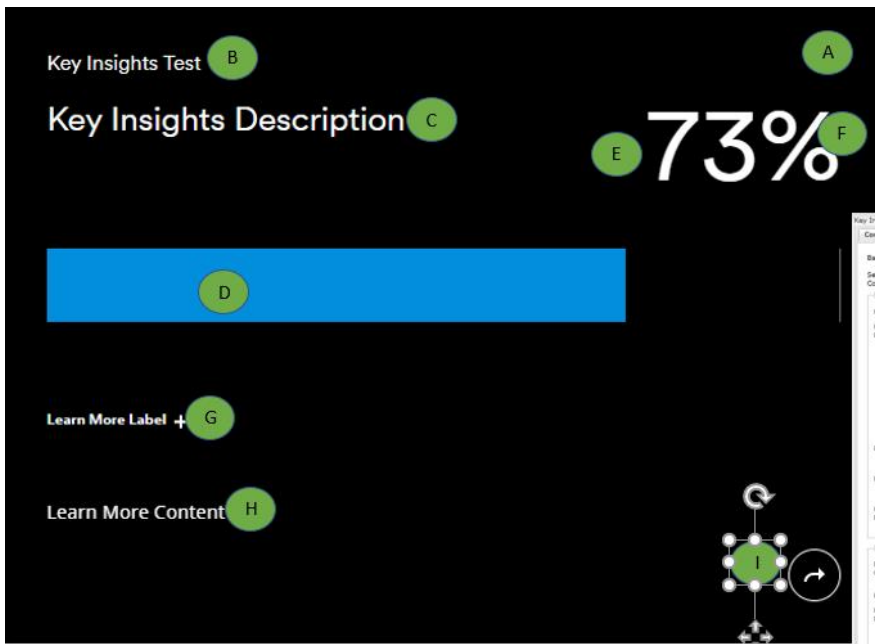
Key Insights Expanded Content: [Rich Text Editor]

Social Sharing Configuration

Enable Social Sharing:
Check to enable social sharing

Key Insights Social Text: [Text Field]
Insert Text to append with the social share feature

OK Cancel



Key Insights 2 Up Variation with No Extra Content

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Key Insights 2 up

Key Insights 2 Up Configuration

Key Insights 2 Up Title: [Text Box]

Key Insights 2 Up (Number 1): [Text Box]
percentage number 1

Key Insights 2 Up (Number Format 1): [Text Box]
Example #/%

Key Insights 2 Up (Caption 1): [Rich Text Editor]
caption should not exceed 110 characters.

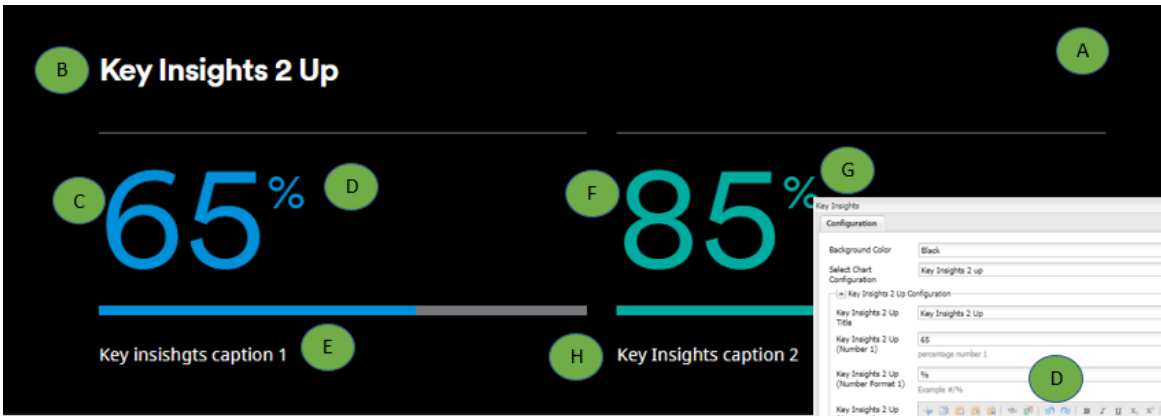
Key Insights 2 Up (Number 2): [Text Box]
percentage number 2

Key Insights 2 Up (Number Format 2): [Text Box]
Example #/%

Key Insights 2 Up (Caption 2): [Rich Text Editor]
caption should not exceed 110 characters.

Extra Content Options: No Extra Content

OK Cancel



Key Insights Configuration

Background Color: Black

Select Chart Configuration: Key Insights 2 up

- Key Insights 2 Up Configuration

Key Insights 2 Up Title: Key Insights 2 Up

Key Insights 2 Up (Number 1): 65
percentage number 1

Key Insights 2 Up (Number Format 1): %
Example #%

Key Insights 2 Up (Caption 1): Key insights caption 1
caption should not exceed 110 characters.

Key Insights 2 Up (Number 2): 85
percentage number 2

Key Insights 2 Up (Number Format 2): %
Example #%

Key Insights 2 Up (Caption 2): Key Insights caption 2
caption should not exceed 110 characters.

Extra Content Options: No Extra Content

OK Cancel

Key Insights 2 Up Variation With CTA

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Key Insights 2 up

Key Insights 2 Up Configuration

Key Insights 2 Up Title

Key Insights 2 Up (Number 1): percentage number 1

Key Insights 2 Up (Number Format 1): Example #/%

Key Insights 2 Up (Caption 1):
caption should not exceed 110 characters.

Key Insights 2 Up (Number 2): percentage number 2

Key Insights 2 Up (Number Format 2): Example #/%

Key Insights 2 Up (Caption 2):
caption should not exceed 110 characters.

Extra Content Options: CTA

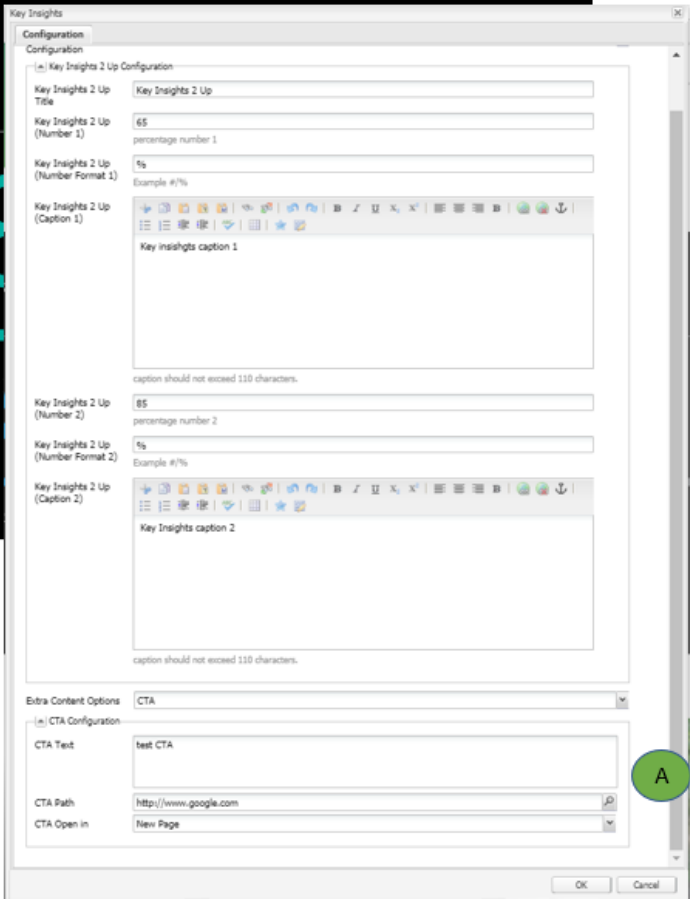
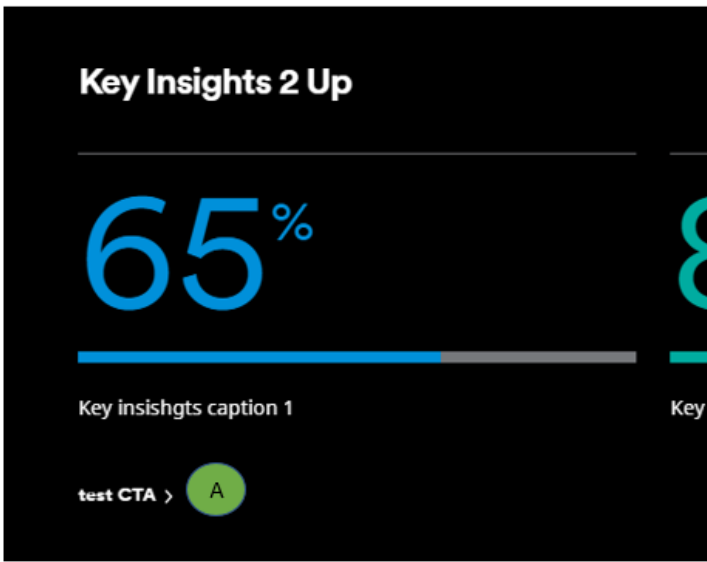
CTA Configuration

CTA Text

CTA Path

CTA Open in

OK Cancel



Key Insights 2 Up Variation with Social Sharing

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Key Insights 2 up

Key Insights 2 Up Configuration

Key Insights 2 Up Title: [Text Field]

Key Insights 2 Up (Number 1): [Text Field]
percentage number 1

Key Insights 2 Up (Number Format 1): [Text Field]
Example #/%

Key Insights 2 Up (Caption 1): [Rich Text Editor]
caption should not exceed 110 characters.

Key Insights 2 Up (Number 2): [Text Field]
percentage number 2

Key Insights 2 Up (Number Format 2): [Text Field]
Example #/%

Key Insights 2 Up (Caption 2): [Rich Text Editor]
caption should not exceed 110 characters.

Extra Content Options: Social Sharing

Social Sharing Configuration

Enable Social Sharing:
Check to enable social sharing

Key Insights Social Text: Key Insights Social
Insert Text to append with the social share feature

OK Cancel

Key Insights 2 Up

Key Insights Configuration

Key Insights 2 Up Title: Key Insights 2 Up

Key Insights 2 Up (Number 1): 65
percentage number 1

Key Insights 2 Up (Number Format 1): %
Example #/%

Key Insights 2 Up (Caption 1):
Key insights caption 1
caption should not exceed 110 characters.

Key Insights 2 Up (Number 2): 85
percentage number 2

Key Insights 2 Up (Number Format 2): %
Example #/%

Key Insights 2 Up (Caption 2):
Key insights caption 2
caption should not exceed 110 characters.

Extra Content Options: Social Sharing

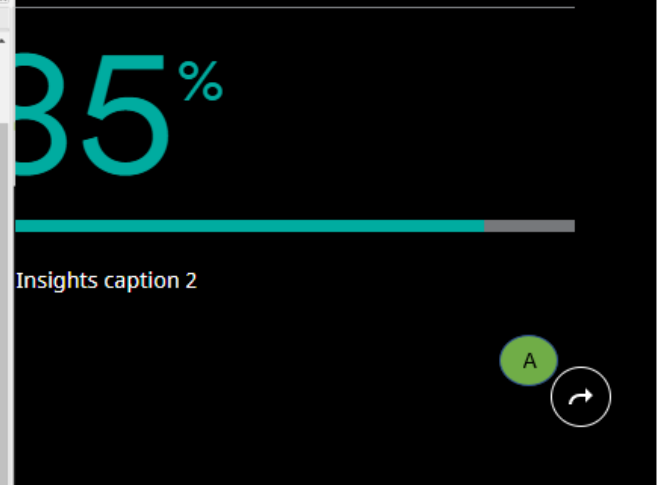
Social Sharing Configuration

Enable Social Sharing: A

Check to enable social sharing

Key Insights Social Text: Key Insights Social
Insert Text to append with the social share feature

OK Cancel



Key Insights 3 Up

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Key Insights 3 up

Key Insights 3 Up Configuration

Key Insights 3 Up Title

Key Insights 3 Up (Number 1): percentage number 1

Key Insights 3 Up (Number Format 1): Example #/%

Key Insights 3 Up (Caption 1):
caption should not exceed 110 characters.

Key Insights 3 Up (Number 2): percentage number 2

Key Insights 3 Up (Number Format 2): Example #/%

Key Insights 3 Up (Caption 2):
caption should not exceed 110 characters.

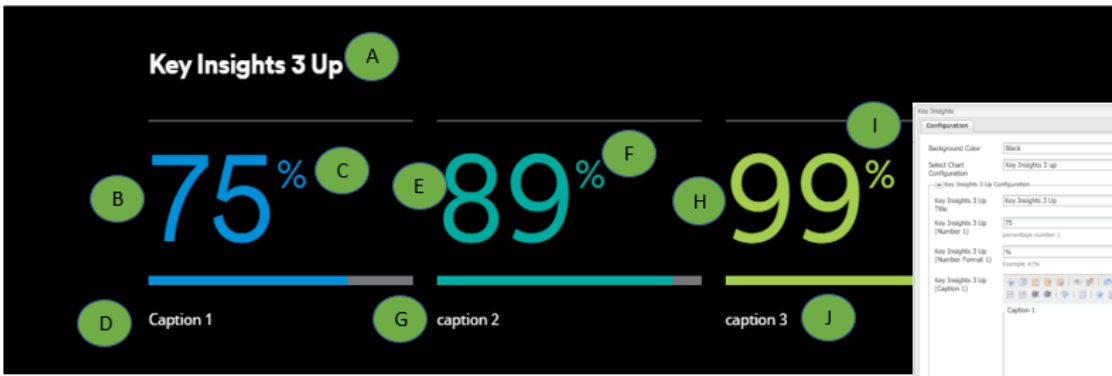
Key Insights 3 Up (Number 3): percentage number 3

Key Insights 3 Up (Number Format 3): Example #/%

Key Insights 3 Up (Caption 3):
caption should not exceed 110 characters.

Extra Content Options: No Extra Content

OK Cancel



Key Insights Configuration

Background Color: Black

Select Chart Configuration: Key Insights 3 Up

Key Insights 3 Up Configuration

Key Insights 3 Up (Number 1)	Key Insights 3 Up (Number 2)	Key Insights 3 Up (Number 3)
Title: 75	Title: 89	Title: 99
percentage number 1: %	percentage number 2: %	percentage number 3: %
Example: 41%	Example: 41%	Example: 41%
Key Insights 3 Up (Caption 1): Caption 1	Key Insights 3 Up (Caption 2): caption 2	Key Insights 3 Up (Caption 3): caption 3

Extra Content Options: No Extra Content

Horizontal Bar Chart Variation

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Horizontal Bar Chart

Chart Title:

Disable Chart Legend:

Check to Disable the Chart Legend

Legend Config

Legend Title*:

Select Legend Key Color:

[Add Variable](#)

Click the '+' to add a new Legend Item

Horizontal Bar Graph Config

Label*:

Legend Config:

Select the Legend Group this percentage is apart of

Number Value*:

number value for the given bar graph

Number Format*:

Example #/%

[Add Bar](#)

Click the '+' to add a new horizontal bar graph

OK Cancel

Horizontal Bar Chart

B

A

Test Label

E

F

73%

G

D

Legend 1

C

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Horizontal Bar Chart

Chart Title: Horizontal Bar Chart

Disable Chart Legend:

Check to Disable the Chart Legend

Legend Config

Legend Title*: Legend 1

Select Legend Key Color: MetLife Blue

[Add Legend Item](#)

Click the "+" to add a new Legend Item

Horizontal Bar Graph Config

Label*: Test Label

Legend Config: Legend 1

Select the Legend Group this percentage is apart of

Number Value*: 73
number value for the given bar graph

Number Format*: %
Example: #7%

[Add Bar](#)

Click the "+" to add a new horizontal bar graph

OK Cancel

A

B

C

D

E

F

G

Horizontal Stacked Bar Chart Variation

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Horizontal Stacked Bar Chart

Chart Title:

Disable Chart Legend:

Check to Disable the Chart Legend

Legend Config

Legend Title*:

Select Legend Key Color:

[Add Variable](#)

Click the '+' to add a new Legend Item

Horizontal Stacked Bar Graph Config

Label*:

Legend Config:

Select the Legend Group this percentage is apart of

First Number Value*:

first number value for the given bar graph

First Number Format*:

Example #/%

Second Legend Config:

Select the Legend Group this percentage is apart of

Second Number Value*:

second number value for the given bar graph

Second Number Format*:

Example #/%

[Add Bar](#)

OK Cancel

Horizontal Stacked Bar Chart

Label 1

50%

80%

Legend 1 Legend 2

Key Insights

Configuration

Background Color: Black

Select Chart Configuration: Horizontal Stacked Bar Chart

Chart Title: Horizontal Stacked Bar Chart

Disable Chart Legend:

Legend Config

Legend Title*: Legend 1
Select Legend Key Color: MetLife Blue

Legend Title*: Legend 2
Select Legend Key Color: MetLife Green

Horizontal Stacked Bar Graph Config

Label*: Label 1

Legend Config: Legend 1

First Number Value*: 50
First Number Format*: %

Second Legend Config: Legend 2

Second Number Value*: 80
Second Number Format*: %