

WebXM Report User

HHS

Agenda

- Online Business Challenges
- Watchfire Solutions
- WebXM Concepts & Terminology
- WebXM User Roles
- User Interface Navigation
 - Dashboards and Reports
- Overview Of The WebXM Configuration For HHS
 - Dashboard Configuration
 - WebXM Quality and Accessibility reporting
 - WebXM Privacy reporting
- Personalizing WebXM
- WebXM Issue Management



Online Business Challenges



How Do You Gain Insight into Online Risk?

					Web Page Checklist
Sta	rt evaluati	ng the pag	je	হ ত	Check All Links are Valid Check for Spelling Errors (Accurately and Consistently)
					Browser Compatibility Issues (Load in different Browsers and Test)
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Control. May 3, 2005) • Watchfire Appoints William B.	Q Accessibility	Generation Site Analysis	RO		Corporate Standards
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Mara Nava 🕨	(A) Corporate Standards		Seminars	\checkmark	Evaluate All Links to see if 3 rd Party Links have Disclosures
Subscribe to our			* Testing Methodo	\checkmark	Compliance Regulations
1 Newsletter			Web Application Scanners (an MS	\checkmark	Compliance Regulations
				\checkmark	Compliance Regulations
				\checkmark	AND THIS IS JUST THE BEGINNING
					Watchfire"

Usually Through an Exhaustive Manual Process





What is WebXM?

 WebXM is a platform for scanning, analysis and reporting of online security, privacy, quality, accessibility and compliance issues across corporate web properties.



How Do We Identify Issues on Your Site?



How WebXM Works

- WebXM collects information by scanning web properties
- Types of WebXM jobs
 - Content scan jobs following the links on (crawling) a website
 - Interaction scan jobs play back and record of site interaction
 - Infrastructure scan jobs port scan on a given IP address range or a collection of hosts



Global Visibility – WebXM Reporting Structure



Visibility & Control



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WebXM Modules





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Online Business Challenges



WebXM Concepts & Terminology

- Webspace
 - Logical entity
 - User roles
- Job
 - A scoped website scan
- Report
 - Broken Links, Missing Metatags, Spelling Errors, etc.
- Report Pack
 - Collection of reports
- Dashboard
 - High level report



Relationship Between WebXM Components

- A job scans the web site, collects data and generates reports
 - Jobs can be scoped to specific web properties
- Reports are organized into report packs
 - The **report pack** can be is geared to suit the end user
 - The reports from one job can be organized in one or many report packs
 - A report pack can contain reports from multiple jobs
- A webspace is a container for the jobs and report packs
- Job results are rolled up into the dashboard where percentage scores are calculated and displayed



Relationship Between WebXM Components (cont'd)



User Security Around WebXM Components

• User security can be tied around

- WebXM
- A Webspace
- A Report Pack
- A Dashboard



WebXM User Types

- System Administrator
 - Complete access to WebXM
 - Access to administration center
 - Add new users
 - Change user's properties and access rights
 - Lock/unlock servers
 - Cancel, End, or Pause running jobs
 - Add words to custom dictionary
 - Create notification devices
 - Update license information
 - Access to global job scheduling
 - Creates and maintains dashboards



WebXM User Types

Webspace Creator

- Can create webspaces
- Becomes the webspace administrator of any webspace the user creates
- Standard User
 - Assigned when granting specific access within Webspaces

No Access

- Can deny access to WebXM



Webspace User Roles

• Webspace Administrator

- Can create, run, and delete jobs and report packs
- Can assign user roles within Webspace
- Can perform global job update actions within Webspace
- Job & Report Administrator
 - Can create, run, and delete jobs and report packs
 - Maintain schedule of jobs within region
 - Fill in form information for jobs



Webspace User Roles

- Report Administrator
 - Report pack maintenance
 - Add/delete reports within report packs
 - Create new report packs
 - Manages issues within report packs
 - Issue classification
- Report Consumer
 - Is able to view report packs within the Webspace
- No Access
 - A user with no access to a particular Webspace



Report Packs and Dashboards

- There are no specific user roles for Report Packs/Dashboards
- Can assign/restrict



WebXM User Permissions



WebXM Deployment

- WebXM is installed centrally and is accessed via a browser throughout the enterprise
- WebXM can be configured to reflect the organization (who does what, who works with who)
 - Webspaces
 - User Roles
 - Interface
 - Dashboard for management
 - Report Packs for the business/technical user
 - Webspace Center for the job administrator
 - Administration Center for the WebXM system administrator



WebXM Dashboards & Reports



- Become familiar with Dashboard layout
- Understand dashboard scoring
- Become familiar with report navigation



Management Intelligence Dashboards





Relationship of Scores



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Issue Hierarchy

- Breaks down the overall score by issue
- The overall score is for the current region
- Score is percentage of pages that don't have a particular issue -- hence "Pages without Broken Links" etc.
- A clean page has NO issues



Understanding Calculations

• The scores are calculated according to the number of pages without any issues

Web Page	Broken Links	Broken Anchors	Spelling	Missing Title	Slow pages	Web Beacons	Small Pages	Old Pages
1	1	1	0	0	0	0	0	1
2	0	1	0	1	0	1	1	0
3	0	0	0	0	0	0	0	0
4	0	1	1	0	1	1	1	0
Issue	75%	25%	75%	75%	75%	50%	50%	75%
Subcategory	25%		50%			25%		
Top Level	25%							



Starting Dashboard

• Found in 'Personalize'

- Choose which dashboard is default
- Choose whether want access to Classic Dashboard

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Quick Reports



Report Pack Components

Collapse/Expand Area



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Report Pack Components cont'd

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Current HHS Configuration

- OpDiv-specific dashboards
- 1 Webspace per OpDiv
- OpDivs only have permissions to see their Webspaces
- Variations of jobs
 - 1 job = 1 unique site
 - 1 job = 1 unique section of 1 site
 - Multiple jobs for 1 site





Demo

Dashboard and Report Navigation at HHS

Accessing Report Packs

• Users can access detailed reports by 2 methods:

- Navigating to Favorites tab and selecting a report pack
- Navigating to the Webspace Center, opening a specific Webspace, and selecting a report pack to view
- There are separate dashboard reports that make up the dashboard



Who Can Access a Report Pack

- The Report Administrator assigns user permissions to a Report Pack
- Users only see and can access Report Packs to which they have been given access
- A user can see *all* reports within a single Report Pack



Are all report packs equal?

- A user may see a different set of reports depending on the method they used to navigate to the report pack
 - Navigating by drilling into regions and sub-regions from dashboard will reveal the "Dashboard Report Pack"
 - Contains *only* reports represented by the most recently viewed dashboard
 - Navigating by any other method will enable a user to view the full report packs created



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Demo

Personalizing WebXM



Issue Management with WebXM

Issue Classification Issue Prioritization

Objectives

- Learn WebXM issue management terminology and concepts
- Learn how to manage & track issues with WebXM
- Understand how to impact dashboard scores with issue management tools
- Learn how to identify critical pages using issue prioritization (Critical Pages)



Issue Management Concepts

• Two WebXM Issue Management features:

- Issue Classification
 - The act of assigning a status or category to an individual issue in a WebXM report
 - Allows you to track the progress of issues through problem resolution
 - Shows progress in dashboard and summary scores without requiring a re-scan



Issue Management Concepts

Issue Prioritization ("Critical Pages")

- Administrator-defined criteria to identify pages as critical wherever they appear in WebXM reports
- The type(s) of issue found on a page, as well as its traffic (if licensed) and region, can be used to evaluate a page's criticality
- Critical Pages are flagged in all WebXM page-based reports so
 they can be acted upon immediately
- A Critical Pages dashboard item is available for tracking and trend analysis



Part A – Issue Classification

- What is an issue?
- Issue States
- Classification Scope



What is an Issue?

- An individual line item within any WebXM "issue"-style report; e.g.
 - A broken link
 - A page missing a title
- In WebXM 4.0, only *issues* can be classified (i.e. not "pages with issues")



Issue States

- Open (default after a new scan)
- In Progress
- Noise
- Fixed
- Passed
- Reopened



Issue Scope

When an issue is classified, its state is reflected in:

- All reports of that type within the job
- All "related" reports of that type within the job (e.g. Broken Links and Pages with Broken Links)
- All dashboard reports of that type within the job



Workflow

- When a scan is done the first time, all issues are marked "Open" by WebXM
- A Report Administrator marks issues as one of: "Noise", "In Progress", "Fixed", or "Passed" – this becomes the issue's "Pending State"
- 3. When reports are re-generated, the issue's Pending State becomes its Current State



Workflow

- 4. The issue stays in its current state until one of the following occurs:
 - A Report Administrator changes its state again and reports are re-generated
 - The item is not found in subsequent scans
 - In the case of Fixed items, if WebXM finds the item next scan, it is marked as "Reopened" by WebXM



Life Cycle of an Issue



Issue Classification in Reports

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Demo

Issue Classification in Reports

Committing Issue Classification Changes

- As mentioned, the classification is committed once reports are re-generated
- Three ways to re-generate reports:
 - Modify report properties in a job (J&RA)
 - Run a dashboard that contains those reports (System Admin or scheduled)
 - Re-run a scan (J&RA or scheduled)



Part B – Issue Prioritization

- Specific WebXM issue types can be set as critical
- Also, specific url regions
- Set by the administrator of the job
- Urls with any of these issues are flagged in the WebXM reports
- There is a separate critical page report
- Critical page score can also be reflected in the dashboard





Demo

Issue Prioritization