

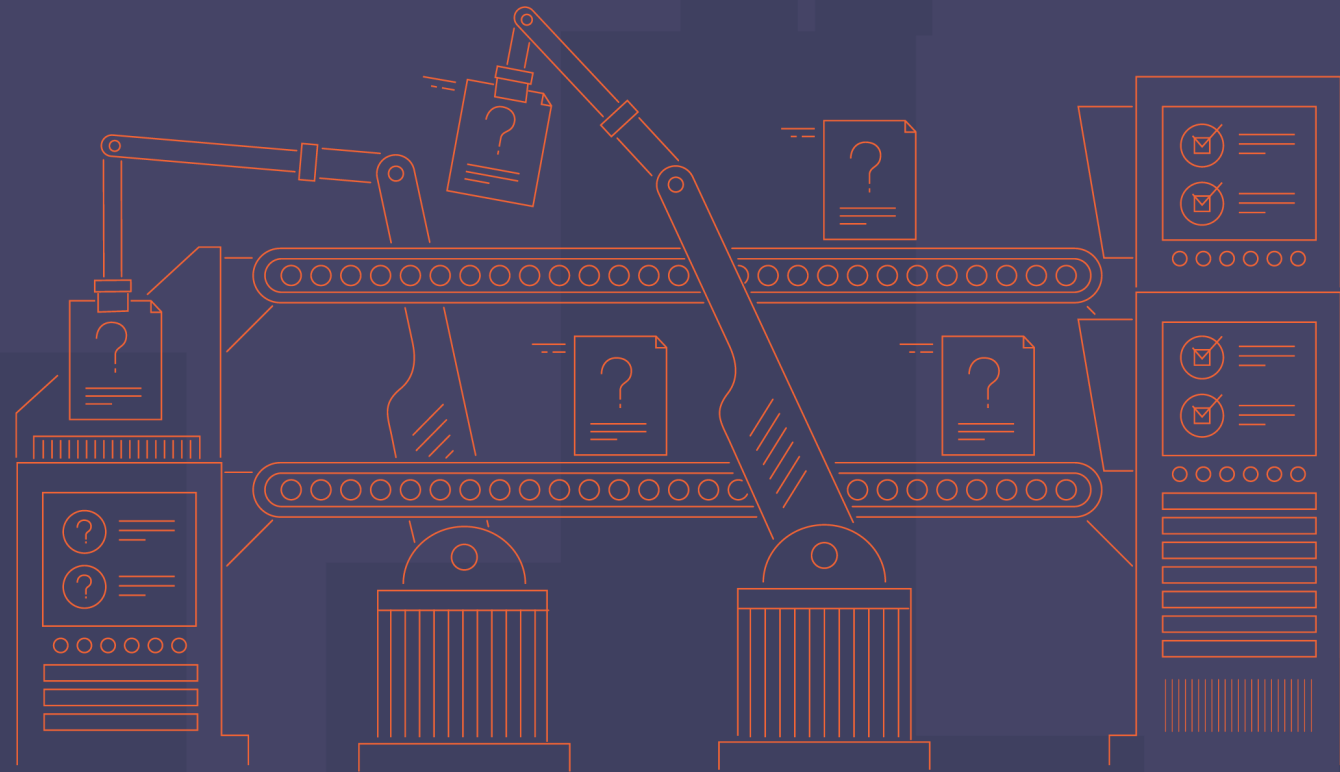
Dashboard Designing

From simple to complex, you will see real world examples of just how powerful the dashboards in Integrify can be.



Danielle Delregno

Customer Success Specialist



What Is A Dashboard?

The screenshot shows the Graysmith Industries dashboard interface. The top navigation bar includes the Graysmith logo, a home icon, a settings icon, a user profile icon (MR), and a help icon. Below the navigation bar, the dashboard is titled "Company Request Dashboard Layout" and shows it is optimized for a "Desktop (1200px - 1999px)" screen size. A "LINKS" button and an "ADD WIDGET" button are visible in the top right corner.

On the left side, there is a sidebar menu with sections for "ACTIONS" (Start A Request, View My Requests, Monitor Requests, Manage Requests, View My Tasks, View My Reports) and "ADMINISTRATION" (Processes, Forms, Reports).

The main content area is divided into several widgets:

- Welcome:** A large header widget with the Graysmith Industries logo and the text "Welcome to the Graysmith Industries portal". It includes a "Switch to Edit" button.
- Company:** A widget with buttons for "VENDOR INVOICE (AP) APPROVAL", "NEW HIRE", and "CONTRACT REVIEW".
- User Account:** A widget with buttons for "UPDATE MY PROFILE", "RESET MY PASSWORD", and "DELEGATE MY TASKS".
- Employee:** A widget with buttons for "PTO REQUEST" and "EXPENSE REIMBURSEMENT".
- My Requests:** A table widget with a search bar and a filter icon. It displays a list of requests with columns for ID, Status, Requester, Date Submitted, and Last Updated. A callout points to the search bar: "Search the report for a specific entry." Another callout points to the filter icon: "Filter the report widget to limit results."
- My Tasks - Newest First:** A table widget with a search bar and a filter icon. It displays a list of tasks with columns for Task, Task Type, Assignee, and Description. A callout points to the filter icon: "Badge indicates how many filters are applied."

Other callouts include:

- "Shows what screen size the dashboard is optimized for." pointing to the desktop resolution indicator.
- "Get links to share the dashboard with others." pointing to the LINKS button.
- "Add new widgets to the dashboard." pointing to the ADD WIDGET button.
- "Edit a widget." pointing to the EDITOR button in a widget header.
- "Delete a widget." pointing to the delete icon in a widget header.

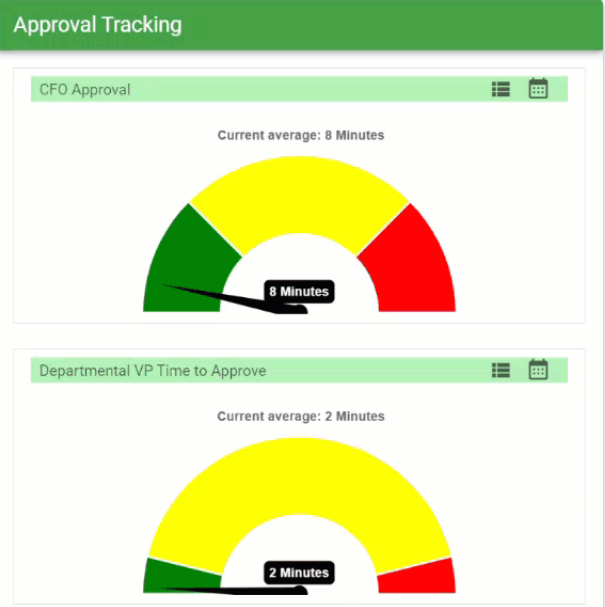
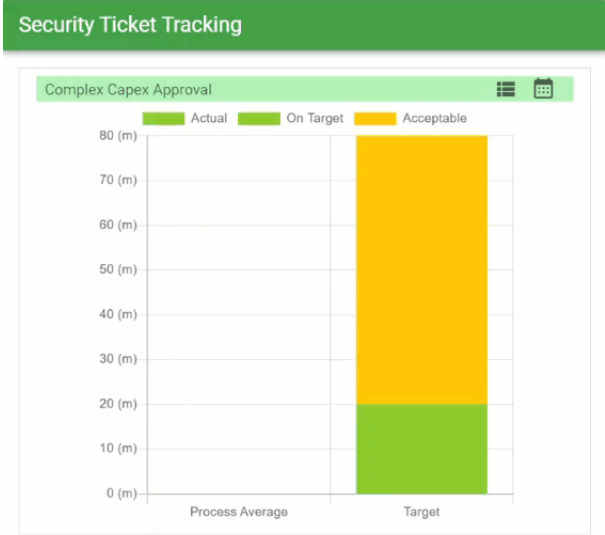
Make your organization more efficient and productive.

Sample HR Dashboard


My Open Tasks Search by task, type, description, request ID

EXPAND ALL


	Task	Task Type ↑	Assigned	Due	Priority	Description	Request ID	Request Status
▼	🔍 (Approval)	Approval	03-09-2023 4:15:05 PM			My First Process	7037	Request Submitted
▼	🔍 Approval	Approval	12-29-2022 12:44:08 PM		None	Trial Process	6696	
▼	🔍 Approval	Approval	12-29-2022 11:21:43 AM		None	Trial Process	6697	
▼	🔍 Approval	Approval	12-29-2022 11:21:43 AM		None	Trial Process	6697	
▼	🔍 Approval	Approval	12-29-2022 11:21:43 AM		None	Trial Process	6697	




HR Contact



Contact Marla in HR
x7639
marla@greysmith.com



Contact Gus in Payroll
x3364
gus@greysmith.com



Contact Steven in Benefits
x2178
steven@greysmith.com


Make your organization more efficient and productive.



Sample HR Dashboard


About Graysmith

Message from Our CEO



[Company Handbook](#) [Employee Merchandise](#)
[W-4 Form](#) [Graysmith News](#)

OnBoarding Dashboard



Welcome to the New Hire Portal

Onboarding Forms

SUBMIT I-9	STATE WITHHOLDING	NEW HIRE REQUEST W/ PREFILLS
401K SUBMISSION	PERFORMANCE EVALUATION	HEALTH AND DENTAL PLAN

US Holiday Calendar

Holidays in United States

Today March 2023 Print Week Month Agenda

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	Mar 1 First Day of Women	2	3	4
5	6	7	8	9	10	11
12 Daylight Saving Time	13	14	15	16	17 St. Patrick's Day	18

My Requests

Search by ID, process, description or requester

EXPAND ALL

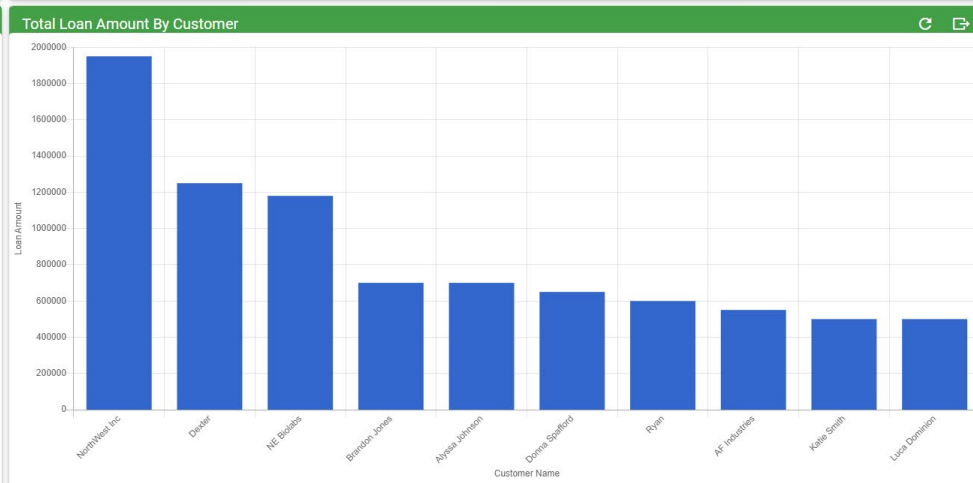
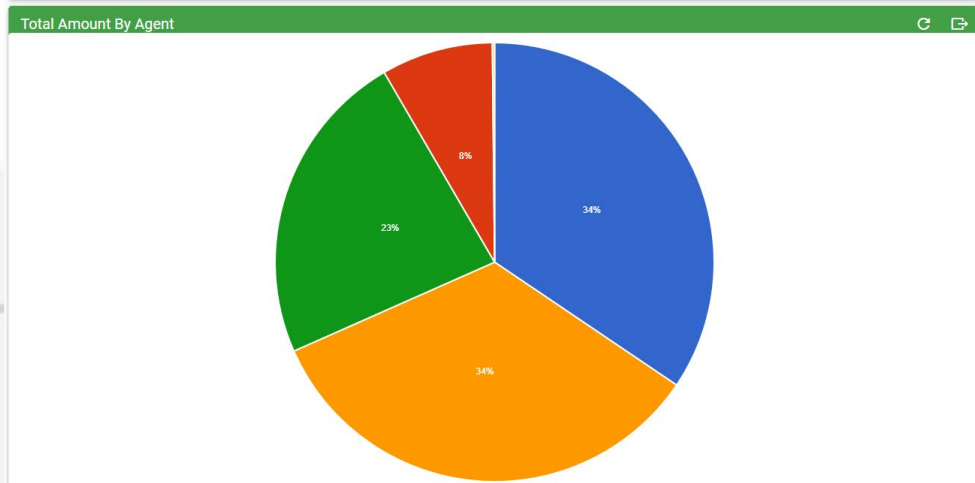
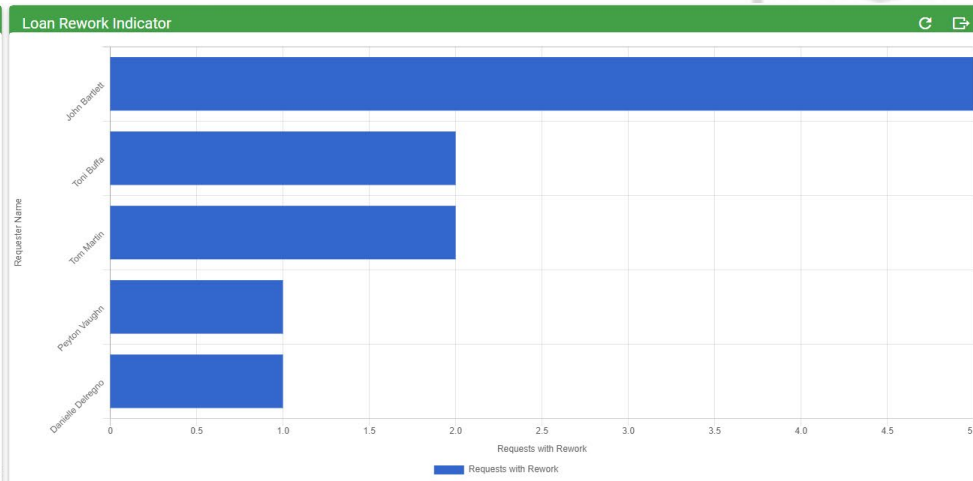
ID	Description	State	Status	Requester	Date Submitted	Last Updated
7130	Submit I-9	In Progress	New Form Pending	Danielle Delregno	03-26-2023 8:42:46 AM	03-26-2023 8:42:46 AM
7129	Submit I-9	In Progress	New Form Pending	Danielle Delregno	03-26-2023 8:42:44 AM	03-26-2023 8:42:44 AM
7056	CapEx Title Not Yet Entered	In Progress	CapEx Request Started	Danielle Delregno	03-14-2023 9:15:00 PM	03-14-2023 9:15:00 PM
7037	My First Process	In Progress	Request Submitted	Danielle Delregno	03-09-2023 4:14:56 PM	03-09-2023 4:15:05 PM
7036	My First Process	In Progress	Request Submitted	Danielle Delregno	03-09-2023 4:12:11 PM	03-09-2023 4:12:28 PM

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Chart Heavy Example

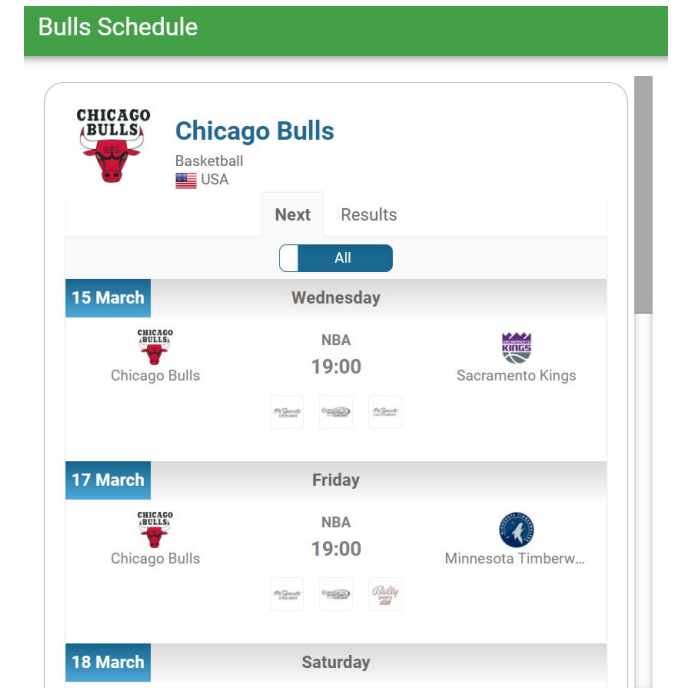
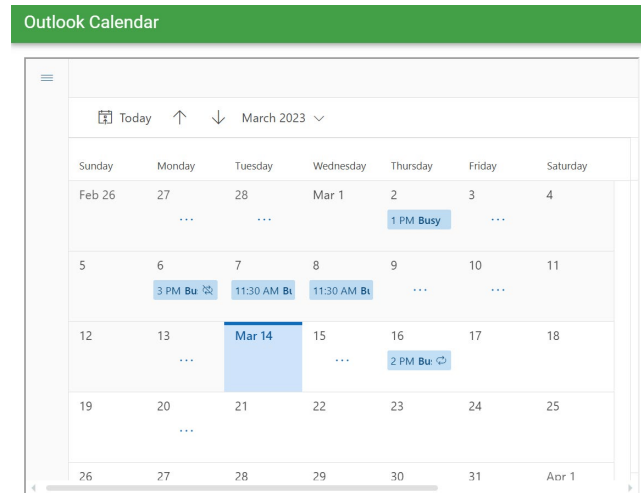


Make your organization more efficient and productive.



Customizing Your Dashboard

- You can customize your Dashboard by adding Launch Buttons, Calendars, Weather, Team Messages, Widgets, and much more.



Today's Messages

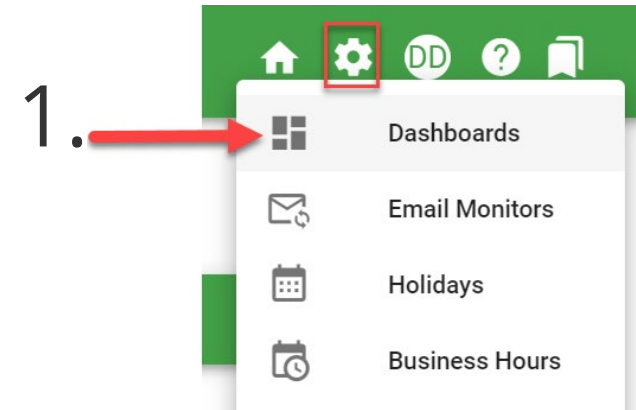


Laid Back Friday!

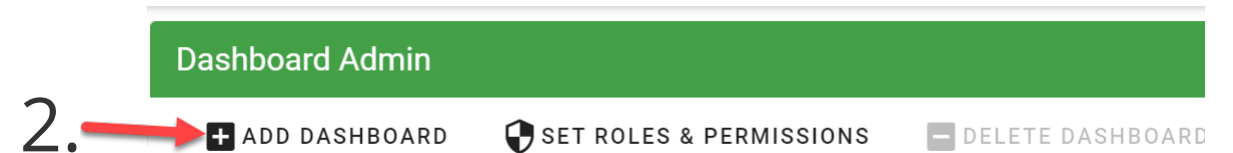
Don't forget tomorrow is Laid Back Friday! Wear some jeans and comfy clothes to work and enjoy some pizza.

Creating A New Dashboard

1. On the upper right corner, hover over the gear icon and select **Dashboards**.

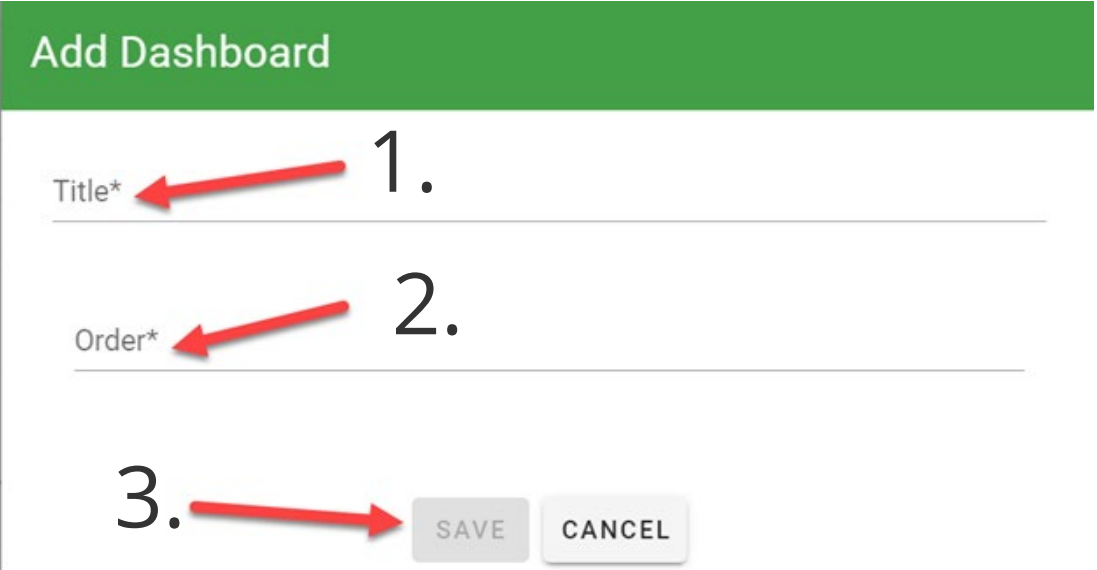


2. Next choose **Add Dashboard** from the menu.



Creating A New Dashboard

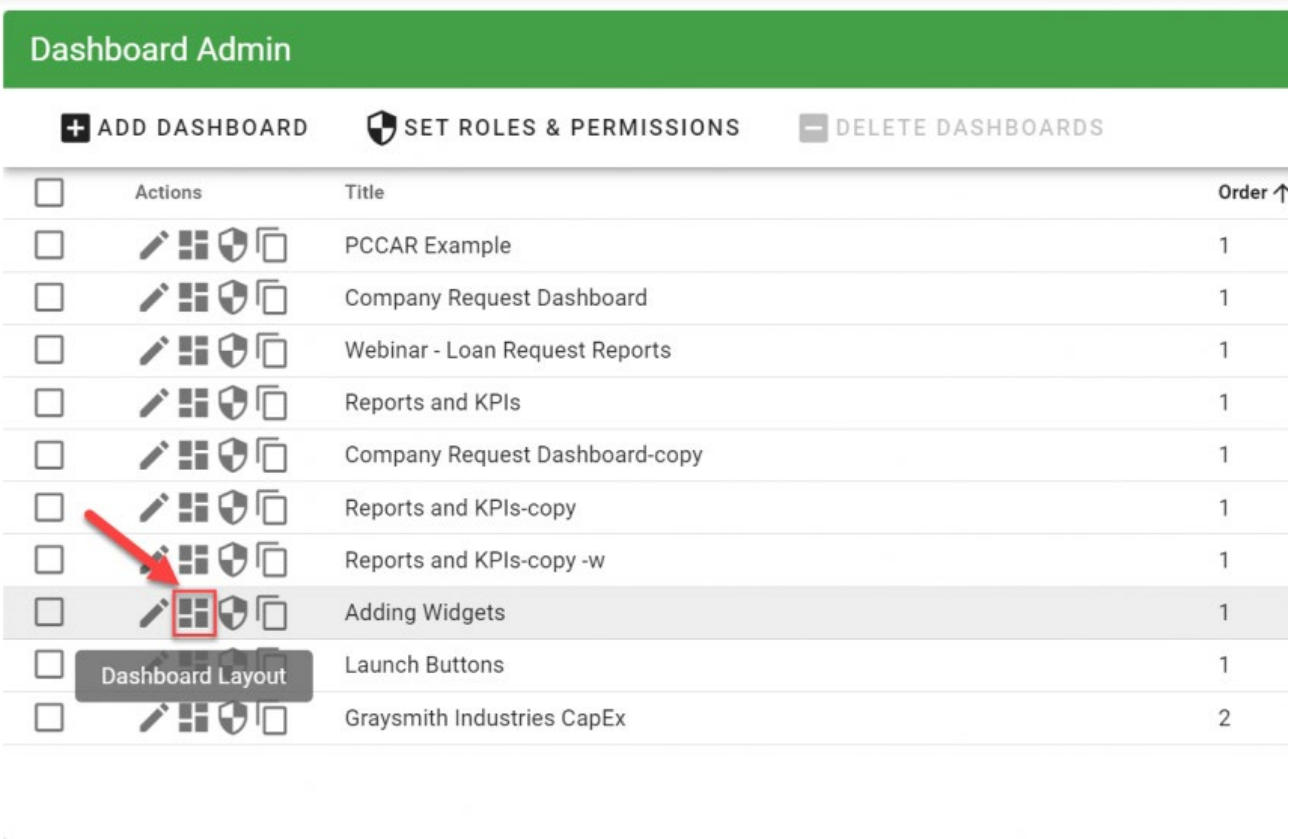
1. Provide a "**Title**" for the dashboard. This will display as the tab title to the user.
2. Provide an "**Order**" value: This will set the dashboard's position in the list of dashboards both in the admin view and as tabs in the end-user's view.
3. Click "**Save**."











































The screenshot shows a form titled "Add Dashboard" with a green header. It contains two input fields: "Title*" and "Order*", each with a red arrow pointing to it and a number (1 and 2 respectively). Below the fields are two buttons: "SAVE" and "CANCEL", with a red arrow pointing to the "SAVE" button and the number 3.

Creating A New Dashboard

- Once you have created a dashboard, it will now show up in your dashboard list.
- To start configuring, select the **Dashboard Layout** icon.



The screenshot shows the 'Dashboard Admin' interface. At the top, there are three buttons: '+ ADD DASHBOARD', 'SET ROLES & PERMISSIONS', and '- DELETE DASHBOARDS'. Below these is a table with columns for 'Actions', 'Title', and 'Order'. The table lists several dashboards, including 'PCCAR Example', 'Company Request Dashboard', 'Webinar - Loan Request Reports', 'Reports and KPIs', 'Company Request Dashboard-copy', 'Reports and KPIs-copy', 'Reports and KPIs-copy -w', 'Adding Widgets', 'Launch Buttons', and 'Graysmith Industries CapEx'. A red arrow points to the 'Adding Widgets' dashboard, which has a grid icon in its actions column. A tooltip labeled 'Dashboard Layout' is visible over the grid icon.

<input type="checkbox"/>	Actions	Title	Order ↑
<input type="checkbox"/>	   	PCCAR Example	1
<input type="checkbox"/>	   	Company Request Dashboard	1
<input type="checkbox"/>	   	Webinar - Loan Request Reports	1
<input type="checkbox"/>	   	Reports and KPIs	1
<input type="checkbox"/>	   	Company Request Dashboard-copy	1
<input type="checkbox"/>	   	Reports and KPIs-copy	1
<input type="checkbox"/>	   	Reports and KPIs-copy -w	1
<input type="checkbox"/>	   	Adding Widgets	1
<input type="checkbox"/>	   	Launch Buttons	1
<input type="checkbox"/>	   	Graysmith Industries CapEx	2



What Is A Widget?

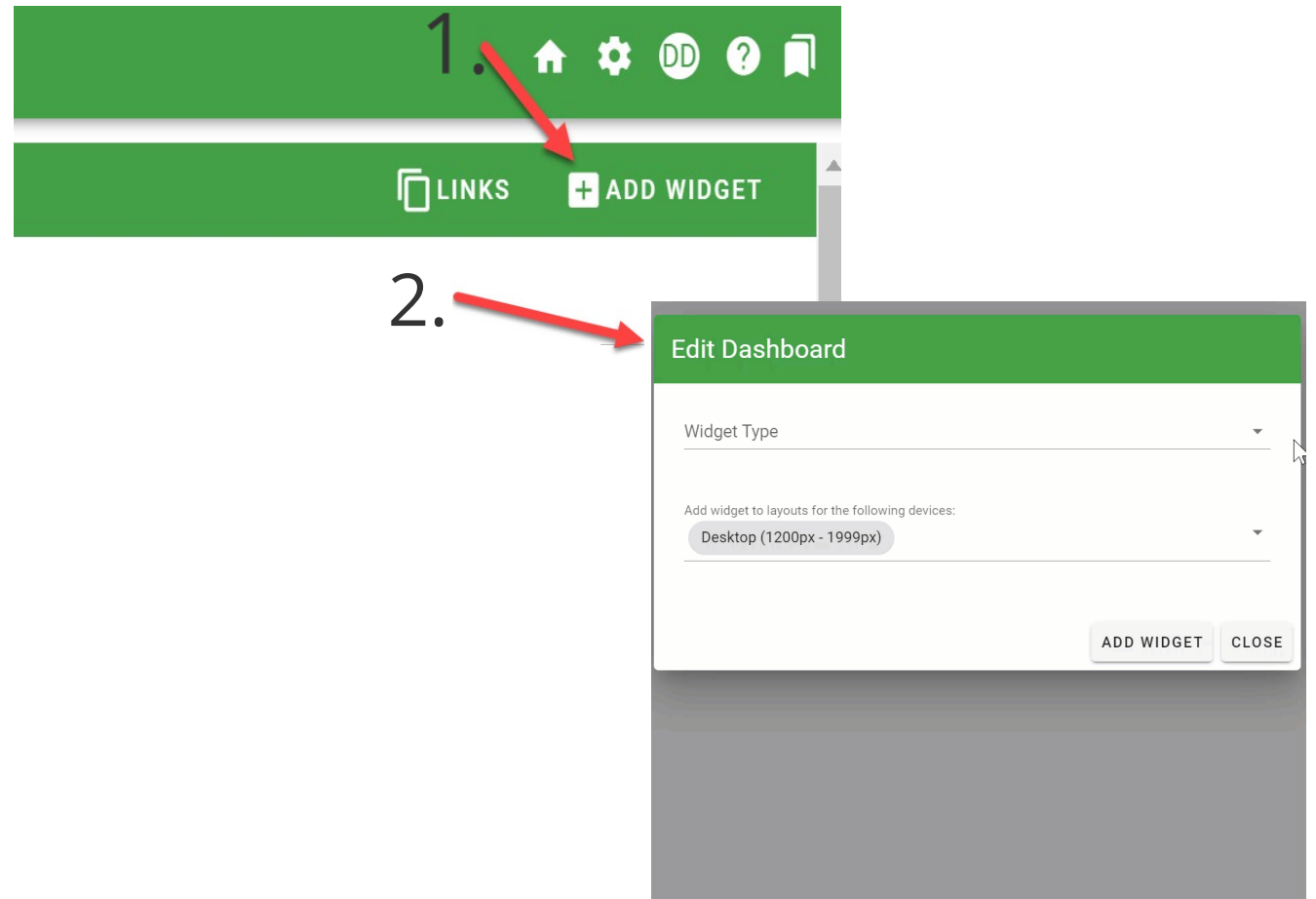
- A Widget is a pre-configured panel that you can utilize on your dashboards.
- It can be an HTML panel, Charts, Reports, KPIs, Messages, and more!

The screenshot displays a dashboard with several widgets:

- My Open Tasks:** A table with columns: Task, Task Type, Assigned, Due, Priority, Description, Request ID, and Request Status. It lists five approval tasks.
- Security Ticket Tracking:** A bar chart titled 'Complex Capex Approval' comparing 'Actual' (green), 'On Target' (light green), and 'Acceptable' (yellow) categories. The Y-axis shows time in minutes (m) from 0 to 80.
- Approval Tracking:** Two gauge charts. The top one is for 'CFO Approval' with a 'Current average: 8 Minutes' and a needle pointing to 8. The bottom one is for 'Departmental VP Time to Approve' with a 'Current average: 2 Minutes' and a needle pointing to 2.
- HR Contact:** Three contact cards for 'Contact Marla in HR' (x7639), 'Contact Gus in Payroll' (x3364), and 'Contact Steven in Benefits' (x2178), each with a profile picture and email address.

Adding Widgets To Dashboards

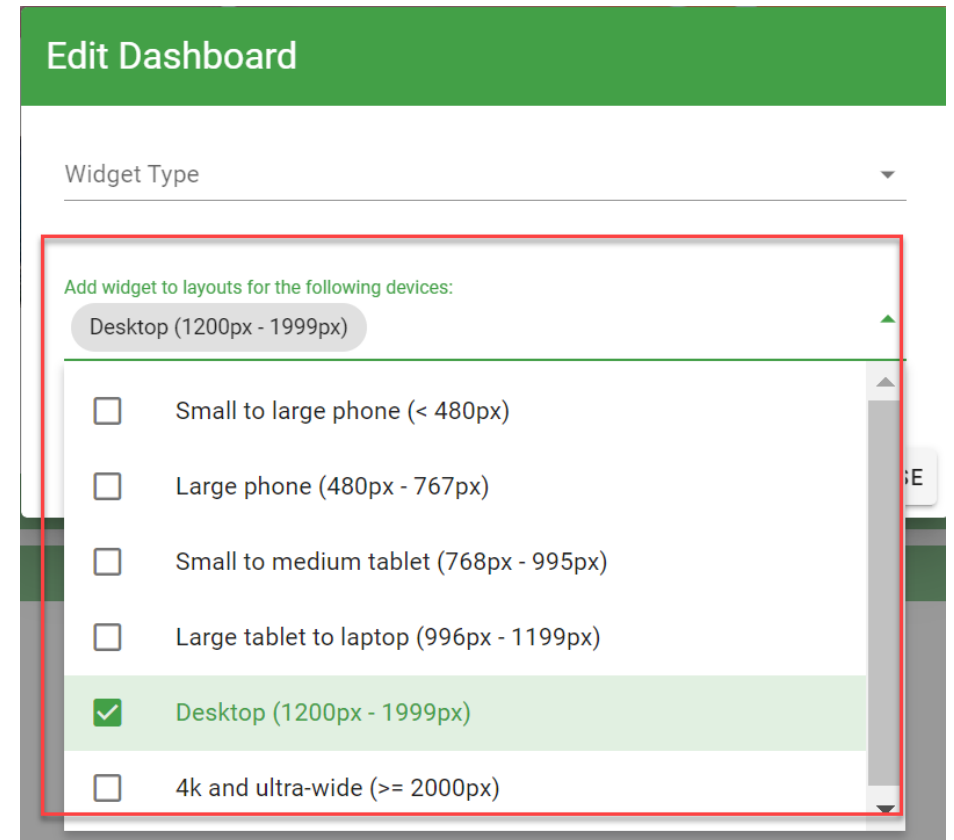
1. On the upper right-hand side of your dashboard, choose “**Add Widget**”.
2. Next, select the Widget Type and which devices the widgets will be used on. (Most of the examples we use today will require an HTML Panel Widget)





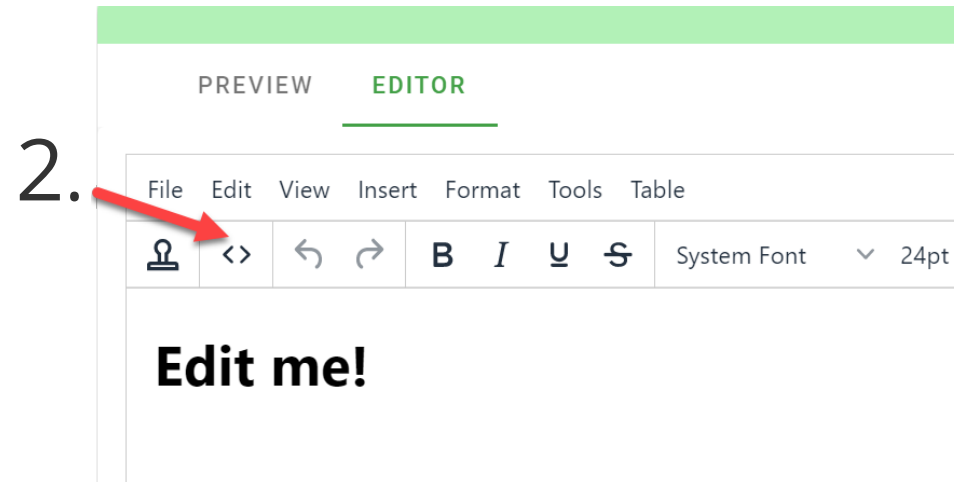
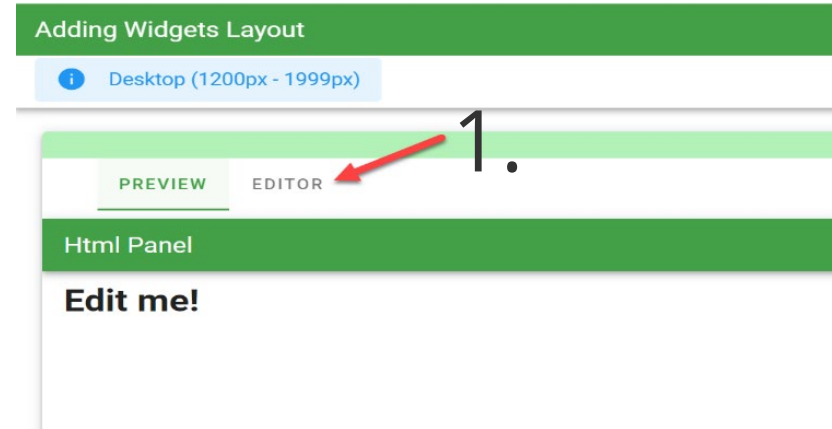
Widget Layouts For Different Devices

- You can ensure a better user experience by deciding what dashboard elements are available for different screen sizes. For smaller screen sizes (for instance mobile devices) you may want to limit which dashboard widgets display.

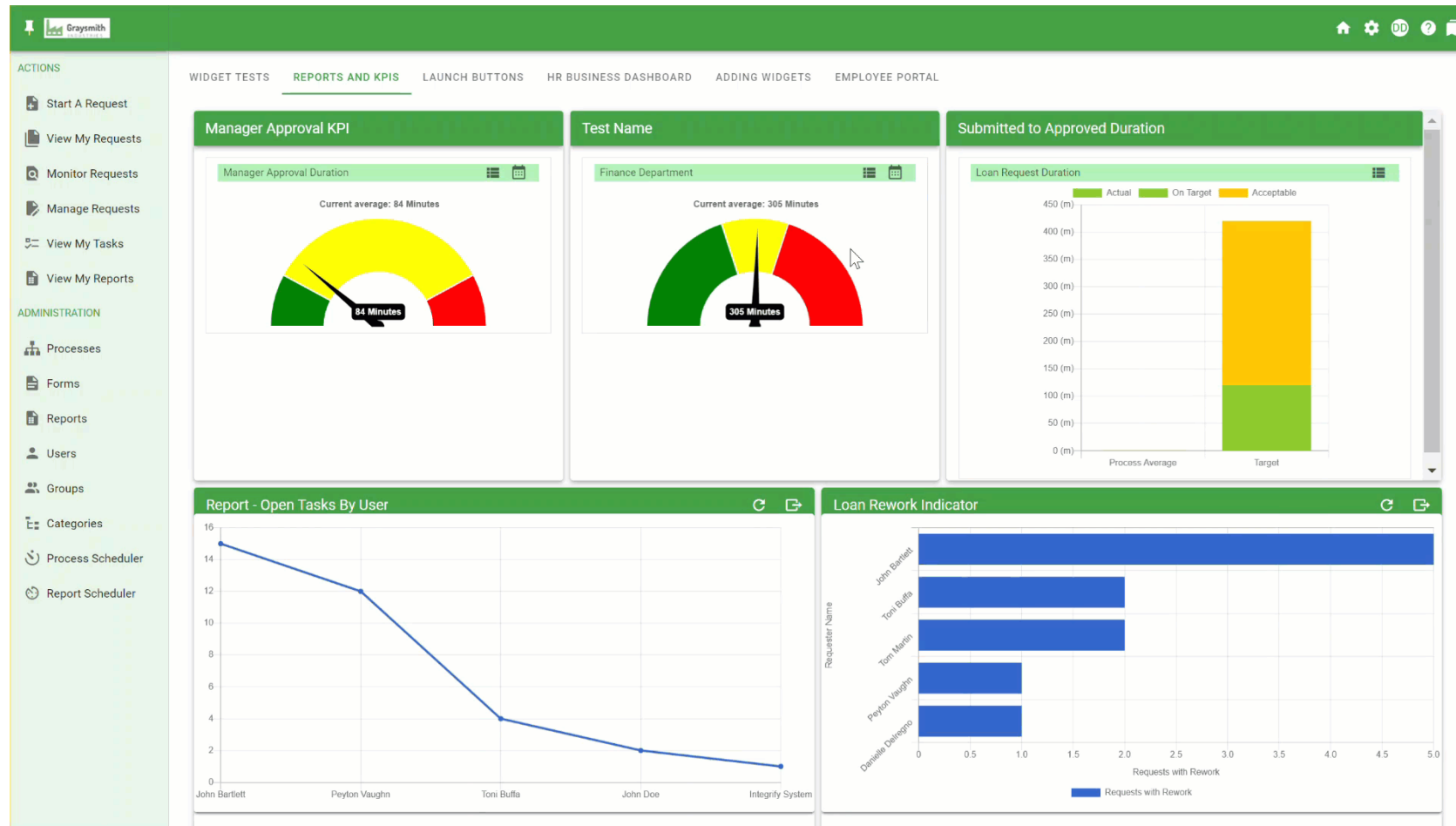


Editing The HTML Widget

1. To edit the HTML Panel, choose the Editor tab.
2. You can then use the **Source Code** button to customize the HTML Panel.



Starting A Request, The Long Way



Make your organization more efficient and productive.

Starting A Request Utilizing Integrify Launch Buttons

The screenshot displays the Graysmith HR Business Dashboard. The interface includes a left-hand navigation menu with sections for ACTIONS and ADMINISTRATION. The main content area is divided into three primary sections:

- KPI's:** Two gauge charts showing process performance. The first, 'HR Approves to IT Work Complete', has a 'Current average: 0 Minutes' and a gauge showing 0 minutes. The second, 'Recruiting to HR Approval', has a 'Current average: 2 Minutes' and a gauge showing 2 minutes.
- HR Business Panel:** A section titled 'Graysmith HR Portal INDUSTRIES' with two main categories: 'Initiate New Hire' (containing 'NEW HIRE REQUEST' and 'INDIRECT HIRE REQUEST' buttons) and 'Initiate Employee Changes' (containing 'EMPLOYEE CHANGE REQUEST' and 'EMPLOYEE OFFBOARDING' buttons).
- New Hire Summary:** A table listing various hire requests with columns for Request Link, Request ID, Requester, Status, Applicant Name, Location, Title, Department, Hardware Needed, Software Needed, Network Access Needed, and Resume.

Request Link	Request ID	Requester	Status	Applicant Name	Location	Title	Department	Hardware Needed	Software Needed	Network Access Needed	Resume
Q	7105	Danielle Delregno	Start New Hire Workflow								
Q	7104	Danielle Delregno	Start New Hire Workflow								
Q	7062	Cole Buchman	Start New Hire Workflow								
Q	7059	Cole Buchman	HR Approved	Joyce Brownell	Bronx	Department Head	Clinical	Laptop	Office 365	CRM	New Hire.pdf
Q	7033	Roman Pendzich	Background Check Completed	John Smith	Briarwood	Sales Director	Sales	Laptop	Office 365 Adobe Creative Accounting	CRM	Justification.docx
Q	7029	George Boole	Background Check Completed	Jane Smith	Briarwood	Lead Marketing Exec	Marketing	PC Smart Watch	Office 365	VPN	Demo Doc.docx
Q	7022	Sam Cooke	IT Tasks Completed	James Grant	Queens	CSO	Sales		Office 365	Intranet	Invoice Template.pdf
Q	7022	Cole									

Make your organization more efficient and productive.



Launch Button Examples

OnBoarding Dashboard



Welcome to the New Hire Portal

Onboarding Forms

SUBMIT I-9

STATE WITHHOLDING

NEW HIRE REQUEST W/ PREFILLS

401K SUBMISSION

PERFORMANCE EVALUATION

HEALTH AND DENTAL PLAN

Start a Request

Contract Review



Benefit Request

Request Time Off

Request a Hiring Report

Safety Incident Report

Request Launch Pad

Please select one of these processes to start:

REQUEST TIME OFF

REPORT INCIDENT

SUBMIT TIME CARD

SUGGESTION BOX

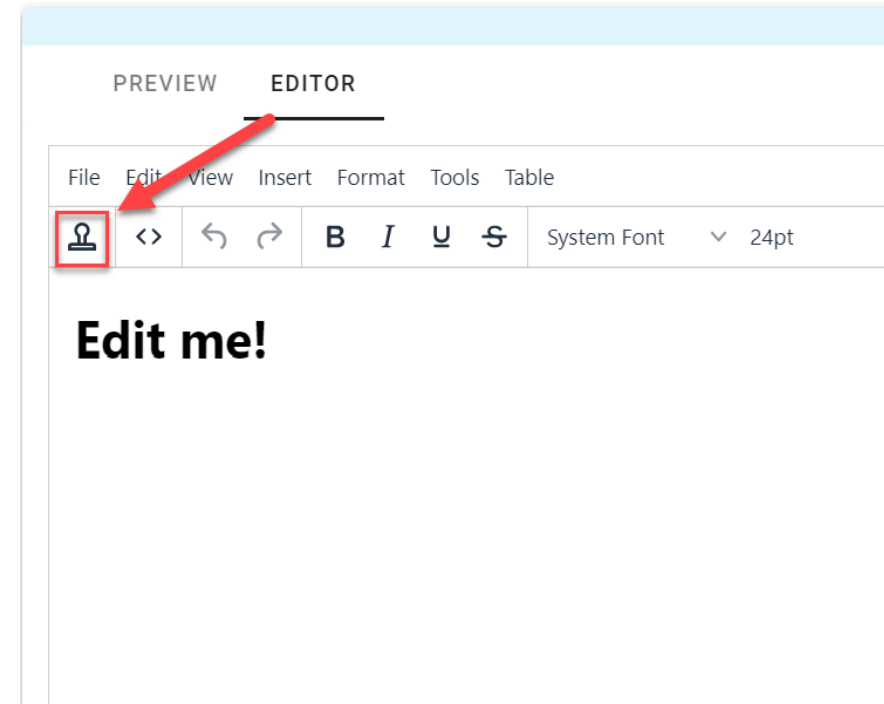
ORDER SUPPLIES

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How To Create A Launch Button

- To add Launch Buttons to your dashboard, use the **HTML Panel** Widget.
- After adding the widget to your dashboard, click on the **Stamp Icon**.



How To Create A Launch Button

- Choose which button template you would like to use and click **Save**.
- Once you have added the Launch Button, you will need to configure it to launch the correct process and change the name of the button.

Insert Template

Templates

Start Request Button Primary



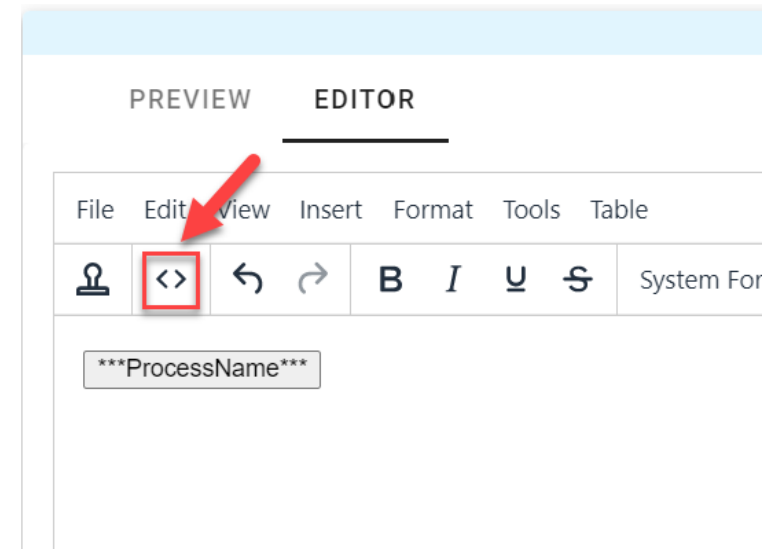
Start Request button with Primary color.

Preview

ProcessName

How To Configure A Launch Button

- For the button to kick off a process, you must paste the process **SID** in the piece of HTML code.
- To edit the code, click on the **Source Code** icon.





Code For Launch Buttons

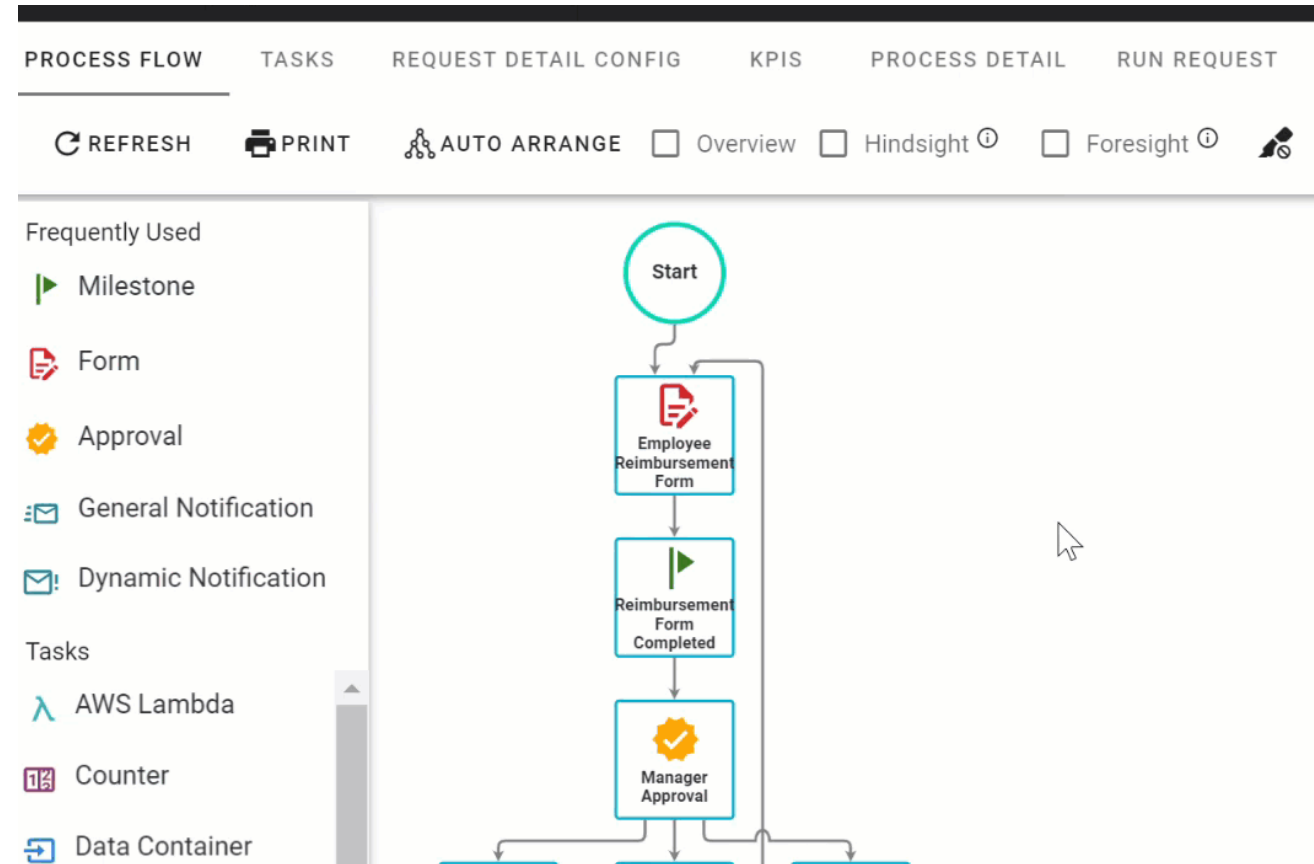
Source Code

```
<p> <button class="v-btn v-btn--contained theme--light v-size--default primary v-btn v-btn--contained theme--light v-size--default"
onclick="Integrify.startRequest({process_sid: '***ProcessSID***'})" > ***ProcessName*** </button> </p>
```

- A Process **SID** is a unique identifier for the process.

Finding The Process SID

- Go to the Process you would like to kick off when the Launch Button is clicked.
- Click on the **Process Detail** Tab.
- Choose **Links/API Options**.
- Copy the **Process SID** at the top.





Configuring Your Launch Button

- Paste the **Process SID** into the Source Code of your Button.

```
Source Code ×  
  
<p> <button class="v-btn v-btn--contained theme--light v-size--default primary v-btn v-btn--contained theme--light v-size--default"  
onclick="Integrify.startRequest({process_sid: '***ProcessSID***'})"> ***ProcessName*** </button> </p>  
  
I  
  
Note: When pasting in the Process SID, erase all the * but leave the single quotes.
```

Naming Your Launch Button

```
Source Code
```

```
<p><button class="v-btn v-btn--contained theme--light v-size--default primary v-btn v-btn--contained theme--light v-size--default"
onclick="Integrify.startRequest({process_sid: 'a0ec9fb6-7c88-41d6-b3a3-1a5a9ce1cb00'})"> ***Process Name*** </button></p>
```

I

Cancel Save

Make your organization more efficient and productive.



System Messages

- System Messages are a great way to get information to certain users or groups right when they log in.
- You can also use System Messages to reach your whole company!

Today's Messages



My Portal Wide Messages!

Update Posted: All requests will require supporting business case documentation.

Dashboard Questions? Please reach out to your Manager.

Training videos can be found here: [How To Video](#)

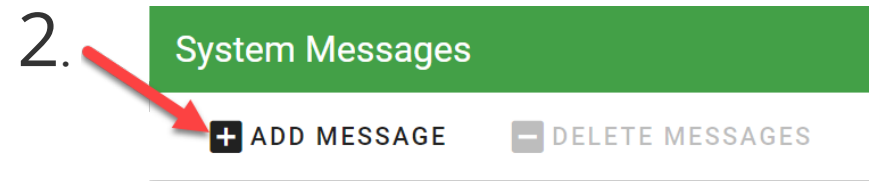
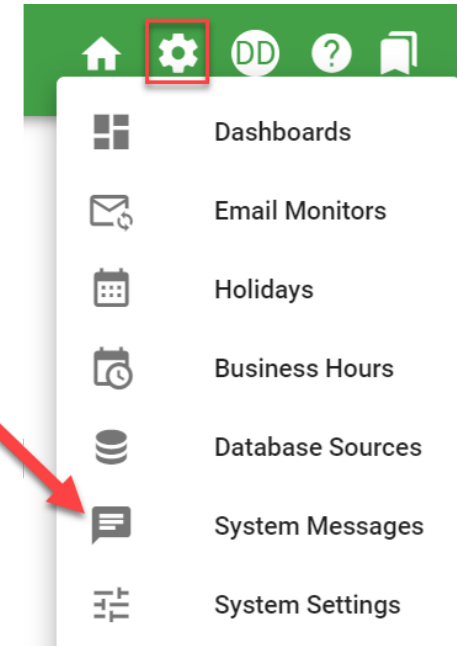


Laid Back Friday!

Don't forget tomorrow is Laid Back Friday! Wear some jeans and comfy clothes to work and enjoy some pizza.


Creating System Messages


1. On the upper right corner, hover over the gear icon and select **System Messages**.
2. Select **Add Message**.



Creating System Messages

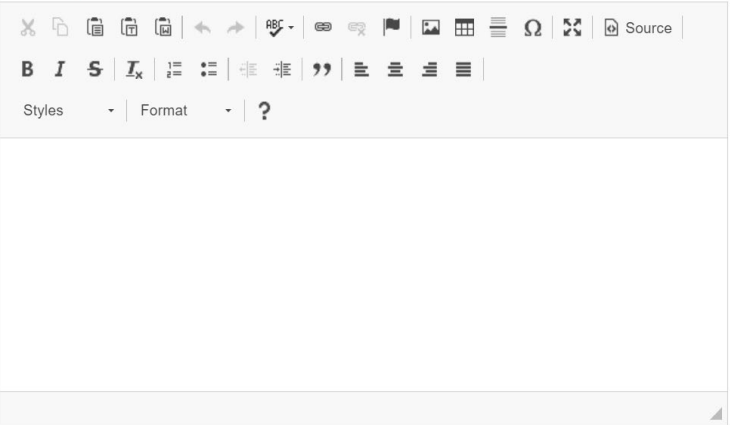
3. Create your System Message by editing the **Subject** Line, the **Body** of the message, and a **Start** and **End** date for the message to appear. Make sure to click **Save!**


3. 


 Edit System Message


Subject

Body



 Start Date

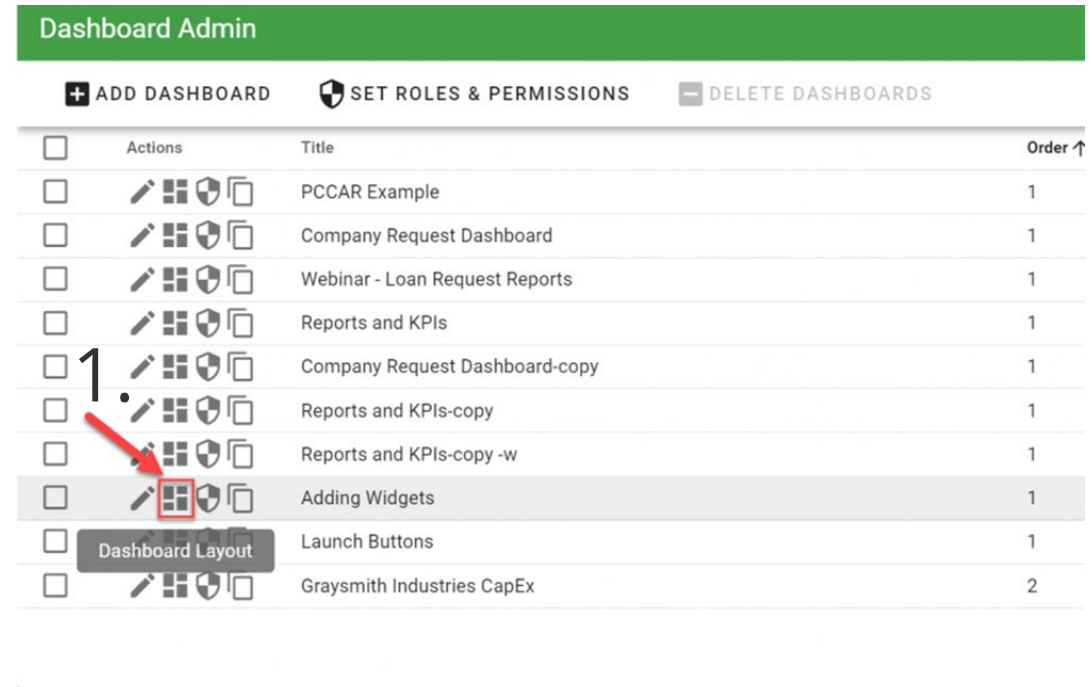
 End Date



Adding System Messages To Your Dashboard









































- Once you have created your System Message, it's time to add it to your dashboards for end users to see!

1. In your Dashboard List, select **Dashboard Layout**.



Dashboard Admin

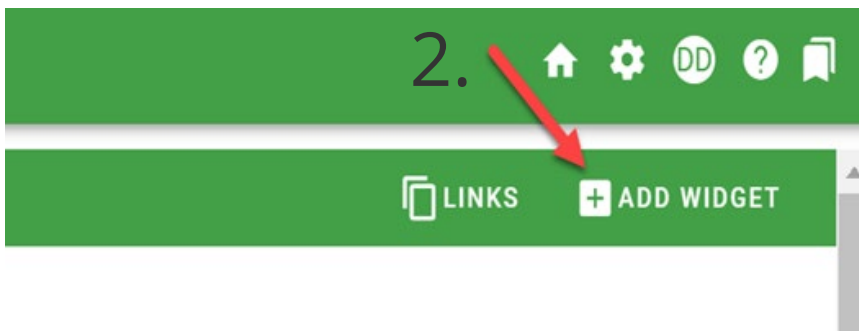
+ ADD DASHBOARD SET ROLES & PERMISSIONS DELETE DASHBOARDS

<input type="checkbox"/>	Actions	Title	Order ↑
<input type="checkbox"/>	   	PCCAR Example	1
<input type="checkbox"/>	   	Company Request Dashboard	1
<input type="checkbox"/>	   	Webinar - Loan Request Reports	1
<input type="checkbox"/>	   	Reports and KPIs	1
<input type="checkbox"/>	   	Company Request Dashboard-copy	1
<input type="checkbox"/>	   	Reports and KPIs-copy	1
<input type="checkbox"/>	   	Reports and KPIs-copy-w	1
<input type="checkbox"/>	   	Adding Widgets	1
<input type="checkbox"/>	   	Launch Buttons	1
<input type="checkbox"/>	   	Graysmith Industries CapEx	2

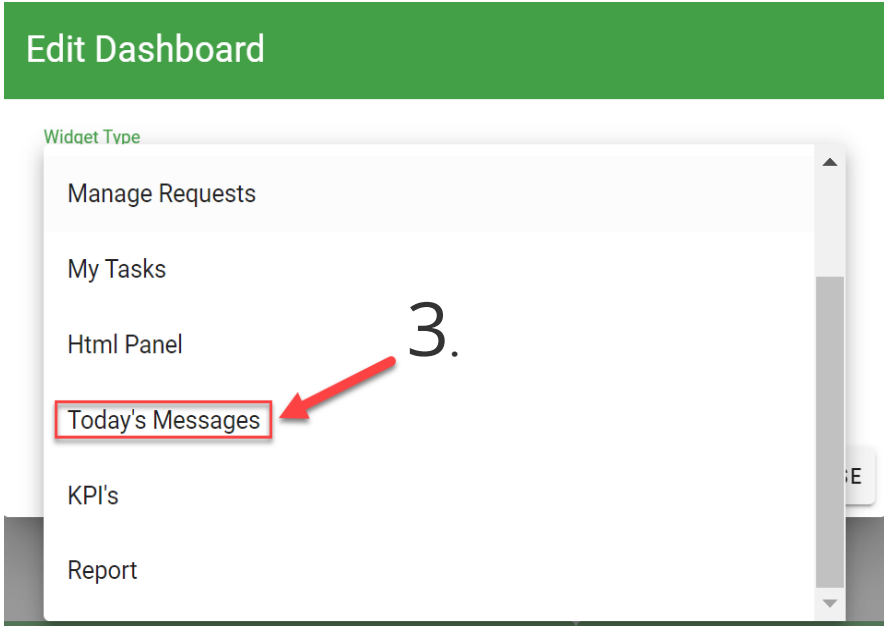


Adding System Messages To Your Dashboard

2. Next, select **Add Widget**.



3. For your Widget Type, select **Today's Messages**.







Adding Reports To Dashboards

- Add a new Widget to your dashboard.
- Under **Widget Type** choose **Report**.
- Select which report you would like to display.

Edit Dashboard

Widget Type
Report 

Add widget to layouts for the following devices:

Desktop (1200px - 1999px) 

Assigning Dashboards To A Group

- On your Dashboard list, select **Set Permissions**.
- On the Dashboard Users, select the **Show Members** icon.

The image shows two screenshots from a software interface. The top screenshot is titled 'Dashboard Admin' and features a table of dashboards. The table has columns for 'Actions' and 'Title'. The 'Employee HR Portal' row is highlighted, and a red box is drawn around the 'Set Permissions' icon in its actions column. A red arrow points to this icon. A 'Set Permissions' button is overlaid on the table. The bottom screenshot is titled 'Dashboard Roles - Employee HR Portal' and shows a table with a 'Name' column. The 'Dashboard Users' row is highlighted, and a red box is drawn around the 'Show Members' icon in its actions column. A red arrow points to this icon. A 'Show Members' button is overlaid on the table.

Dashboard Admin

+ ADD DASHBOARD SET ROLES & PERMISSION

<input type="checkbox"/>	Actions	Title
<input type="checkbox"/>		Adding Widgets
<input type="checkbox"/>		Employee HR Portal
<input type="checkbox"/>		Capex w/ Forecasts
<input type="checkbox"/>		Prim
<input type="checkbox"/>		Premium - Lookback Data

Dashboard Roles - Employee HR Portal

Show Members

<input type="checkbox"/>	Name
<input type="checkbox"/>	Dashboard Users
<input type="checkbox"/>	System Administrators

Assigning Dashboards To A Group

Manage Role Members - Dashboard Users

Filter Accounts

<input type="checkbox"/>	Add	Type	ID	Name
<input type="checkbox"/>	+	👤	149	A Test Group
<input type="checkbox"/>	+	👤	151	Abby Approver
<input type="checkbox"/>	+	👤	104	ACCA Pricing Team
<input type="checkbox"/>	+	👤	161	Accounting
<input type="checkbox"/>	+	👤	162	Accounts Payable
<input type="checkbox"/>	+	👤	201	Accounts Receivable
<input type="checkbox"/>	+	👤	1	Administrators
<input type="checkbox"/>	+	👤	101	Affiliate Approvals
<input type="checkbox"/>	+	👤	152	Alex Approver

Filter Members

<input type="checkbox"/>	Remove	Type	ID	Name
<input type="checkbox"/>	-	👤	189	Danielle Delregno
<input type="checkbox"/>	-	👤	196	Michael Del Regno
<input type="checkbox"/>	-	👤	107	Mike Raia
<input type="checkbox"/>	-	👤	98	Richard Trusky
<input type="checkbox"/>	-	👤	145	Tom Martin

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Choose the Group you would like to add and click the **+** icon to add it to the list of Dashboard Users.

Other Fun Widgets!

- You can add almost any widget to your dashboards if there is an HTML Code to paste in.

Bulls Schedule

CHICAGO BULLS
Basketball
USA

Next Results

All

27 March Monday

Los Angeles Clippers vs Chicago Bulls
NBA 21:30

29 March Wednesday

Chicago Bulls vs Los Angeles Lakers
NBA 19:00

31 March Friday

+69° +81° F +60°
Austin
Sunday, 26

Monday		+79°	+57°
Tuesday		+67°	+58°
Wednesday		+64°	+54°
Thursday		+73°	+62°
Friday		+83°	+69°
Saturday		+85°	+60°

See 7-Day Forecast >>>

News Options

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Q&A

