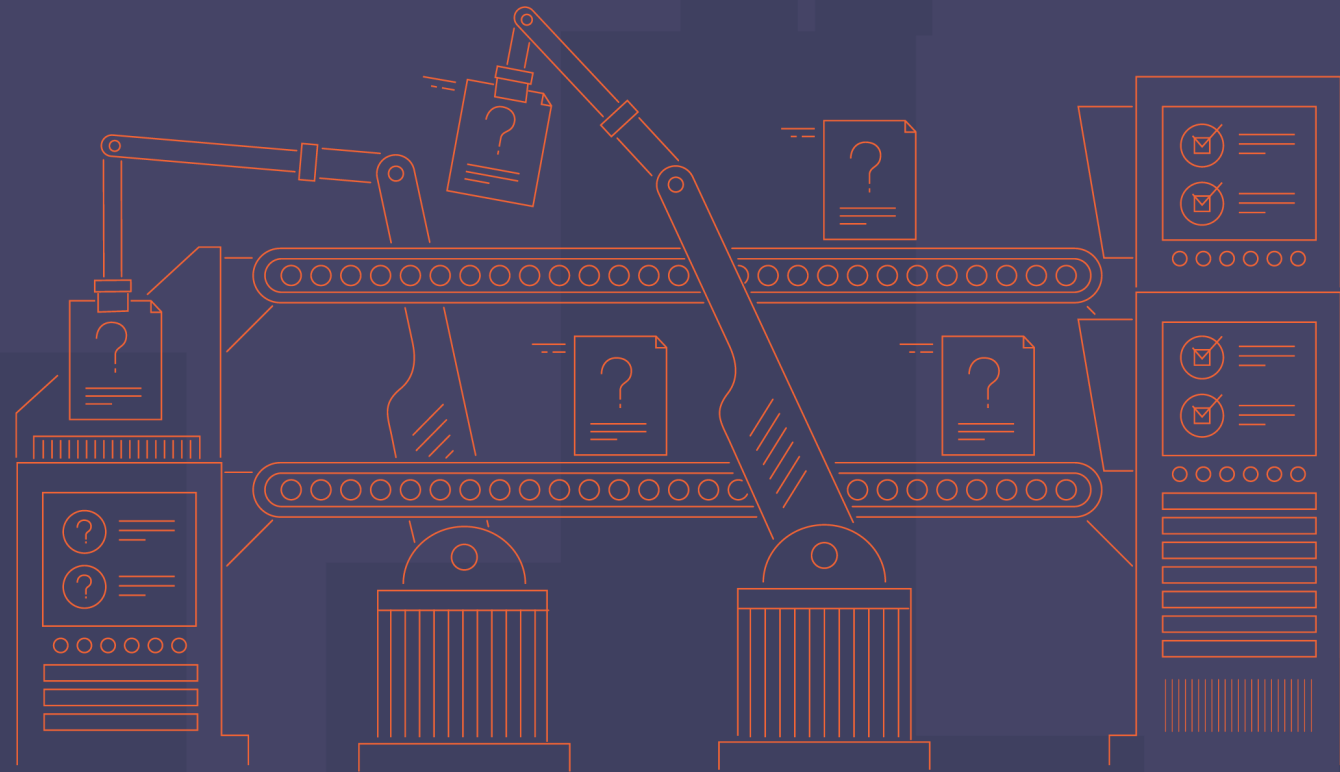# Dashboard Designing

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?

Sample HR Dashboard

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Sample HR Dashboard

About Graysmith

Message from Our CEO

Integrify Interview with Bab...

Company Handbook | Employee Merchandise
W-4 Form | Graysmith News

OnBoarding Dashboard

Graysmith INDUSTRIES

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 Tir	13	14	15	16	17 St. Patrick's Day	18

My Requests

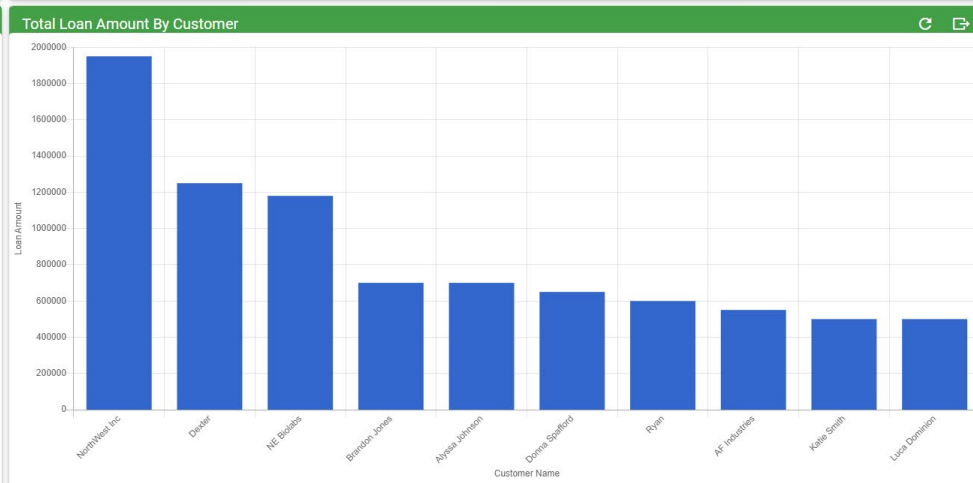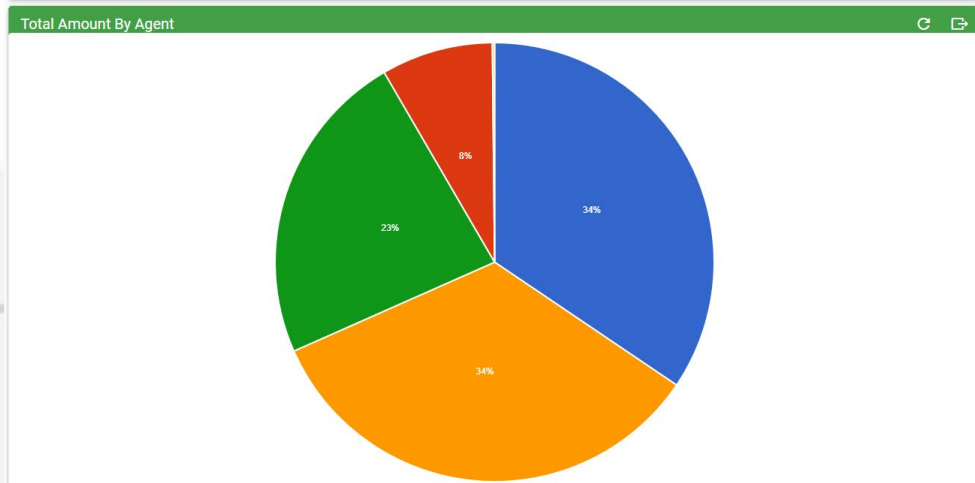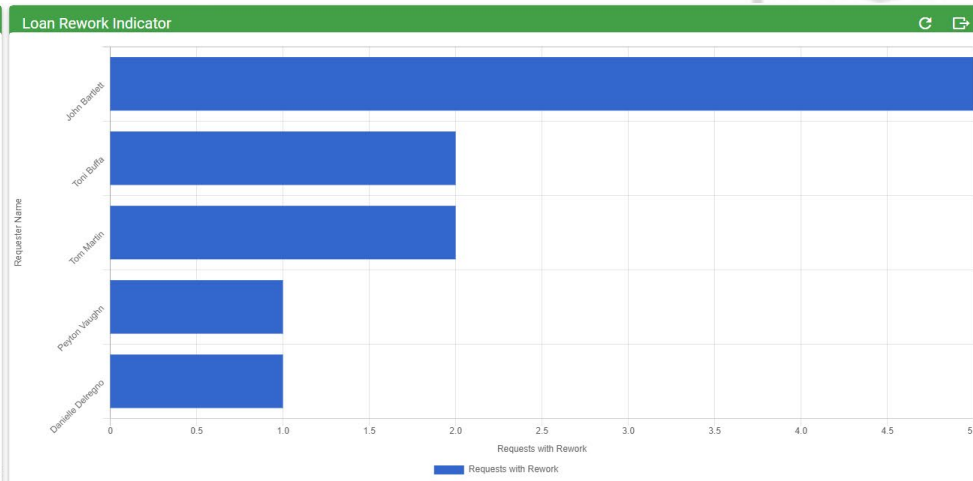Search by ID, process, description or requester

∨ 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

Rows per page: 5 ▼ 1-5 of 91 ≪ ‹ › ≫

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Chart Heavy Example

Report - Open Tasks By User

Loan Rework Indicator

Total Amount By Agent

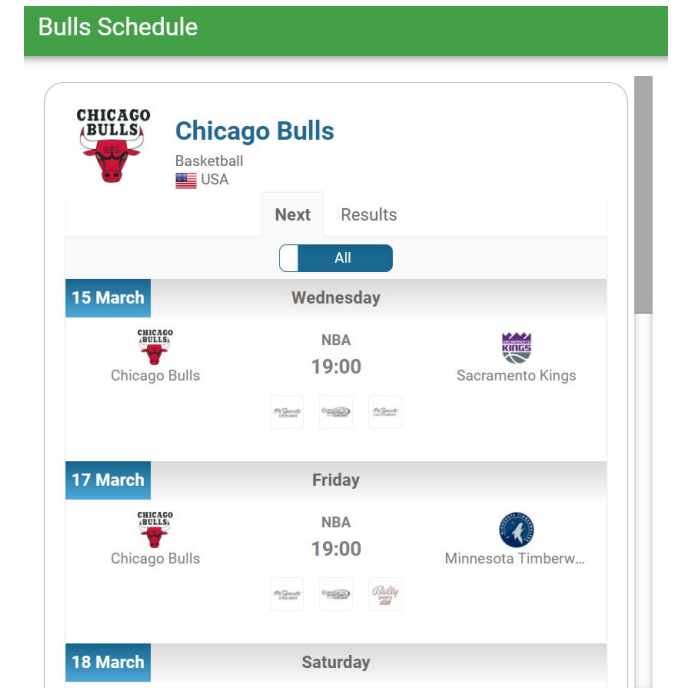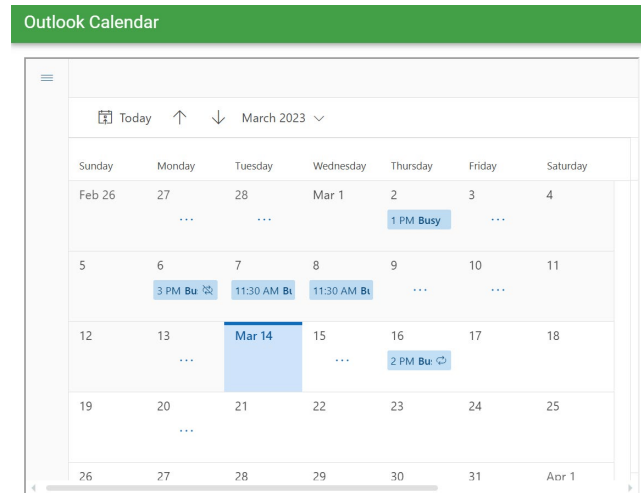**Total Loan Amount By Customer**

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Customizing Your Dashboard

- You can customize your Dashboard by adding Launch Buttons, Calendars, Weather, Team Messages, Widgets, and much more.
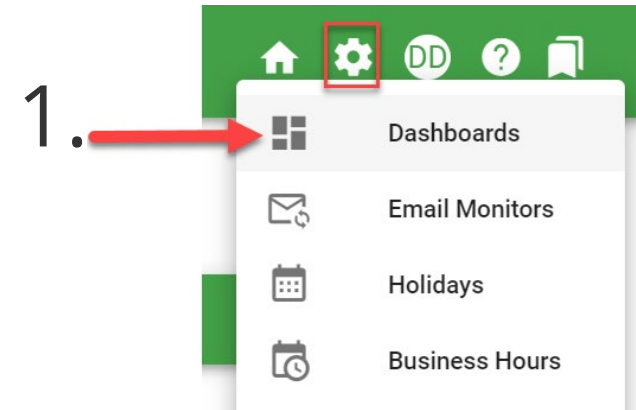
Make your organization more efficient and productive.
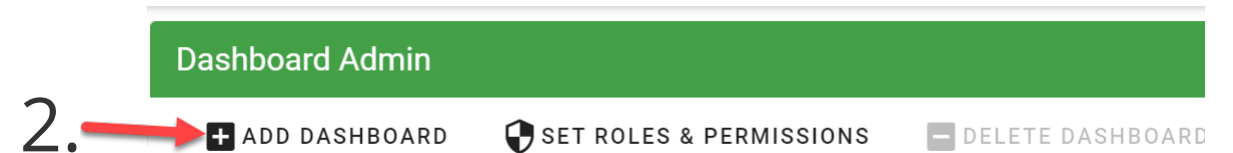
Creating A New Dashboard

1. On the upper right corner, hover over the gear icon and select **Dashboards**.
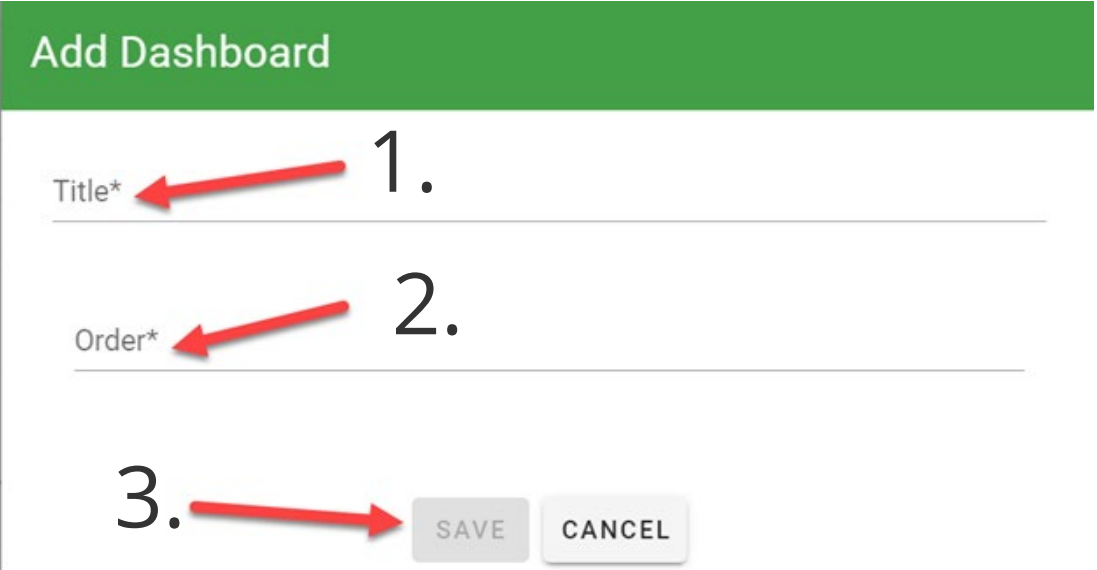
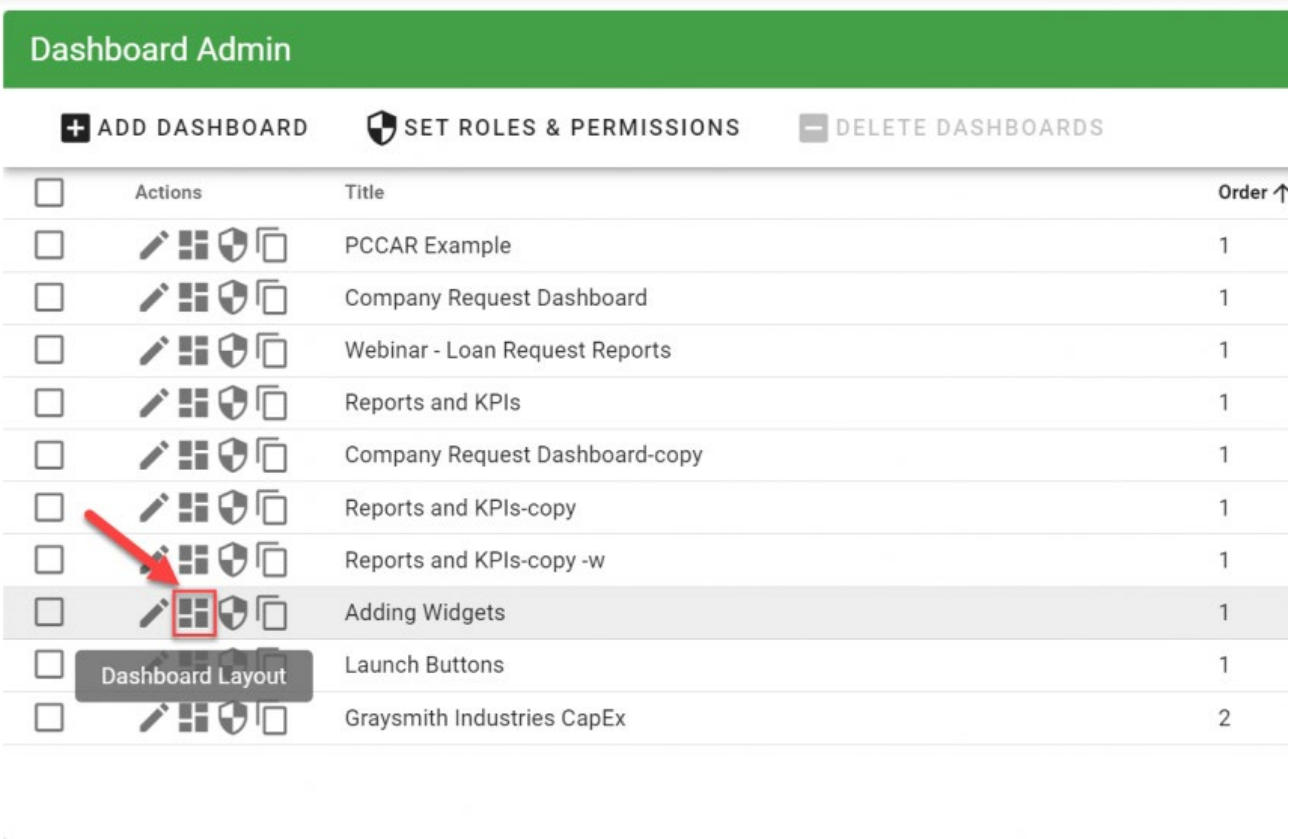2. Next choose **Add Dashboard** from the menu.

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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**."

Add Dashboard

Title* ← 1.

Order* ← 2.

3. → SAVE   CANCEL

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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.

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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!

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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)

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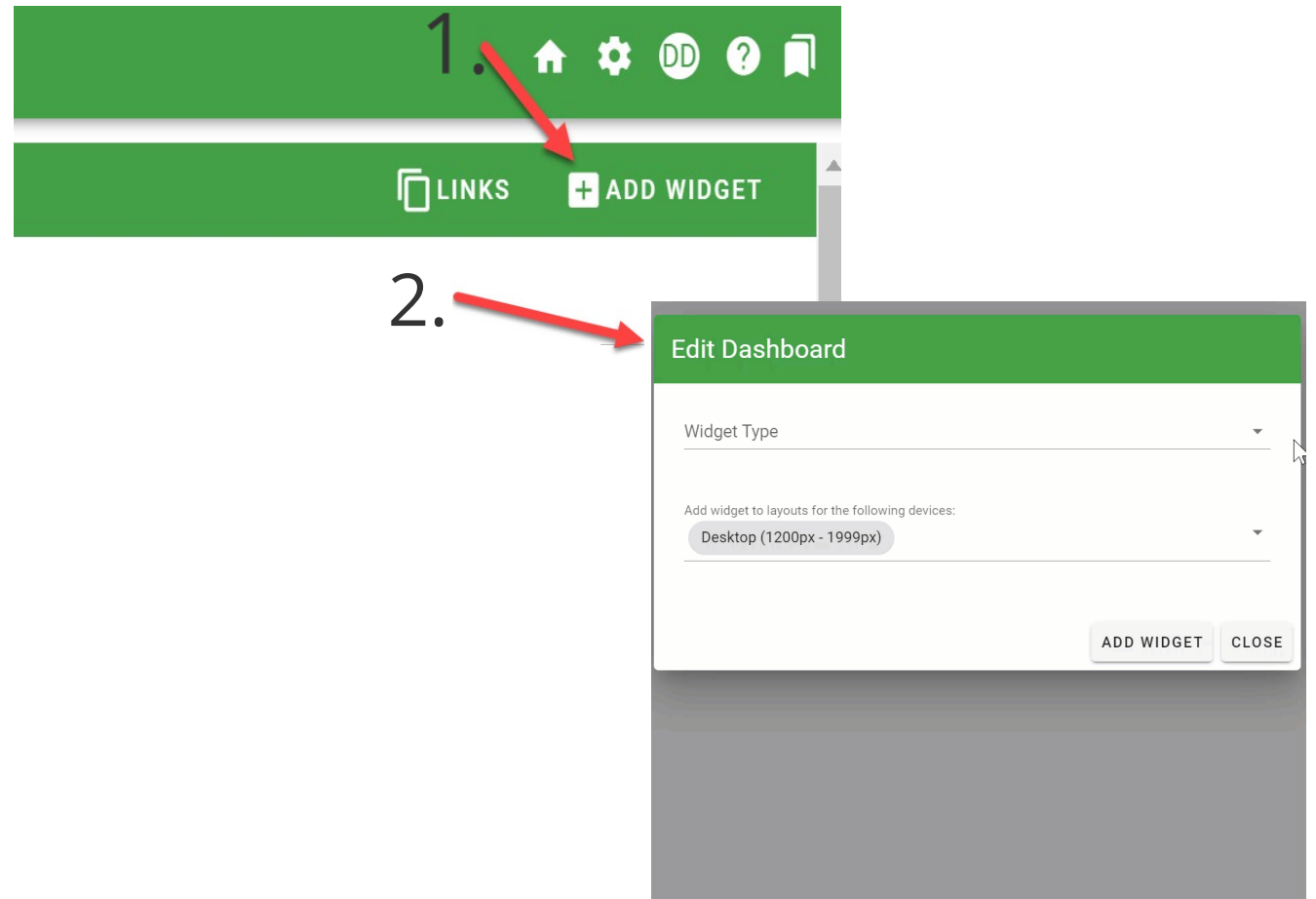
Widget Layouts For Different Devices

- 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.

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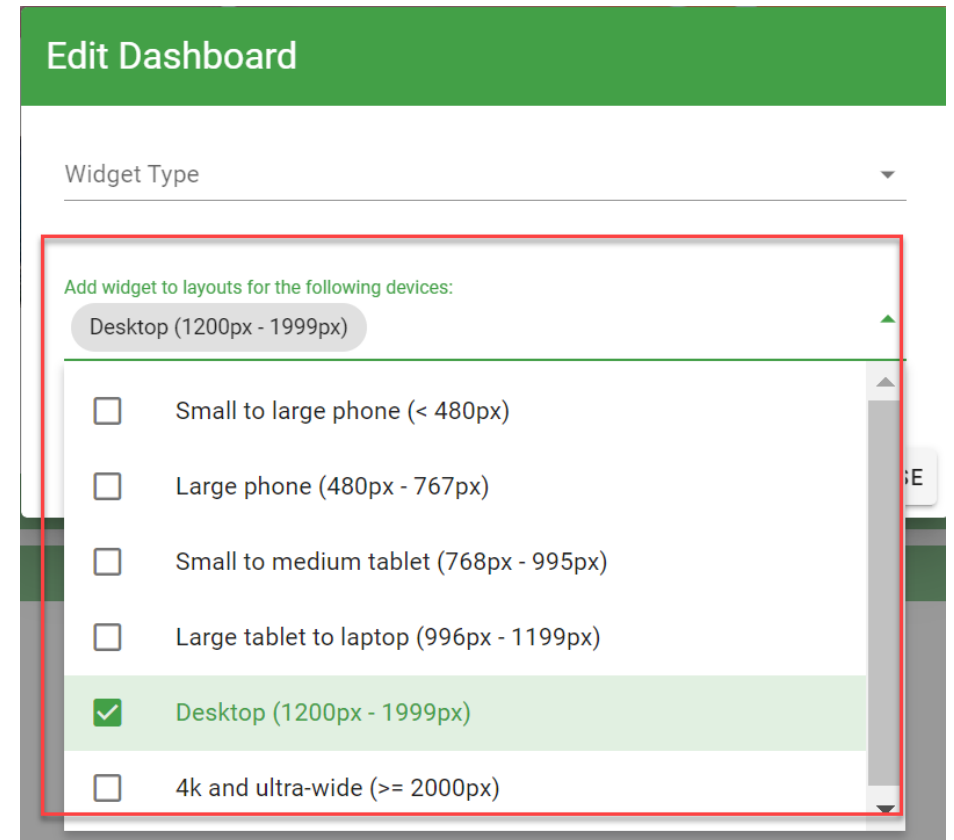
Editing The HTML Widget

1. To edit the HTML Panel, choose the Editor tab.

2. You can then use the **Source Code** button to customize the HTML Panel.
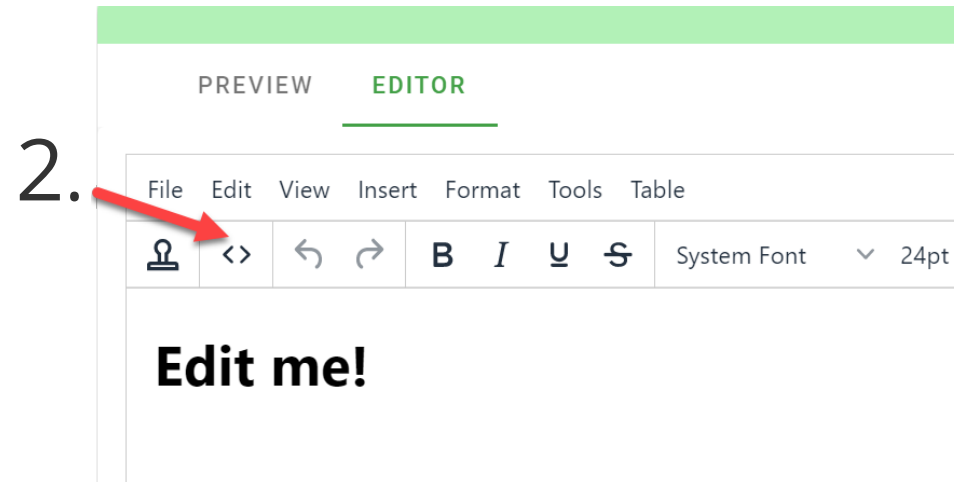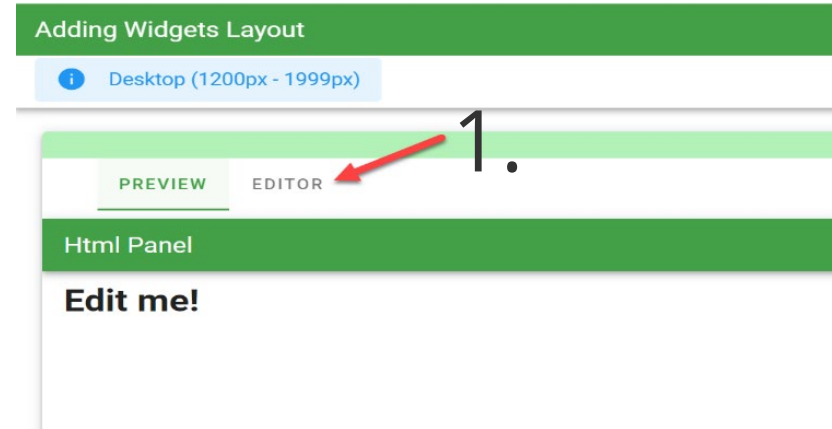
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Starting A Request, The Long Way
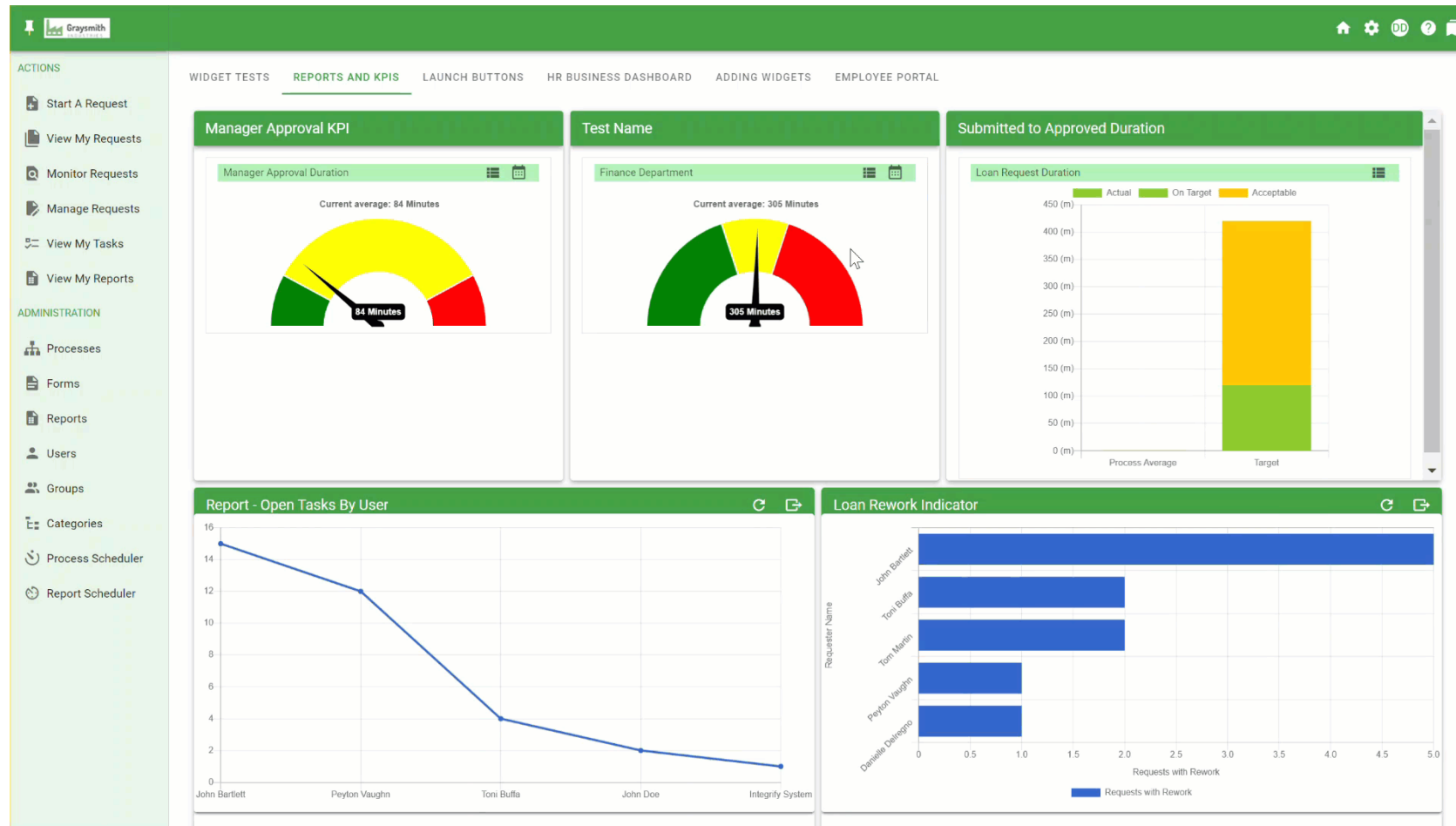
Starting A Request Utilizing Integrify Launch Buttons

Launch Button Examples

OnBoarding Dashboard

Graysmith
INDUSTRIES

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

Request Launch Pad

Start a Request

Please select one of these processes to start:

Contract Review	Launch Onboarding	Benefit Request	Request Time Off	Request a Hiring Report	Safety Incident Report

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**.

◆ **integrify**
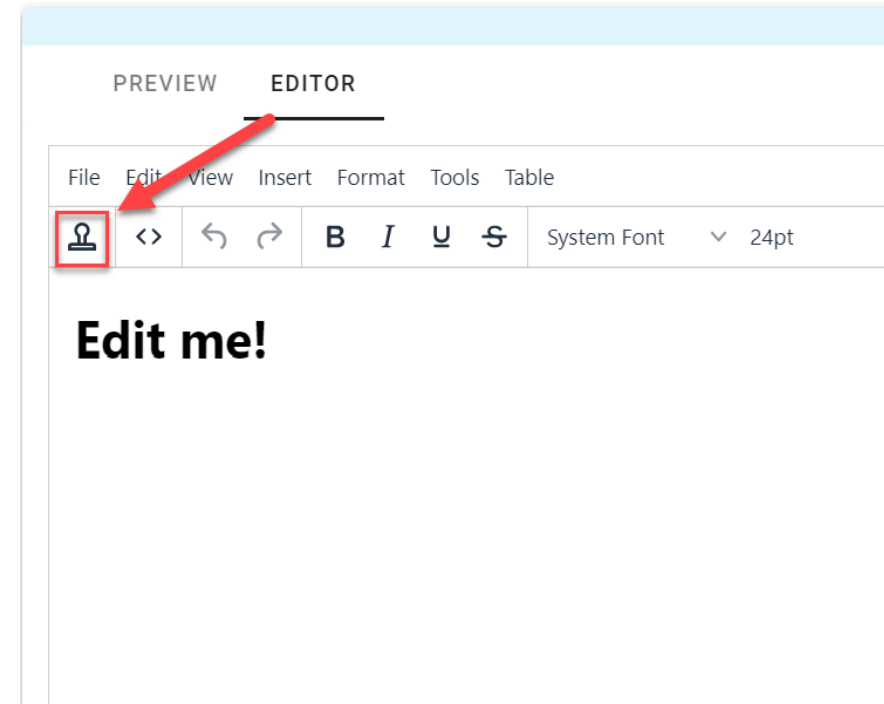
How To Create A Launch Button

- 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

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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.

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Code For Launch Buttons

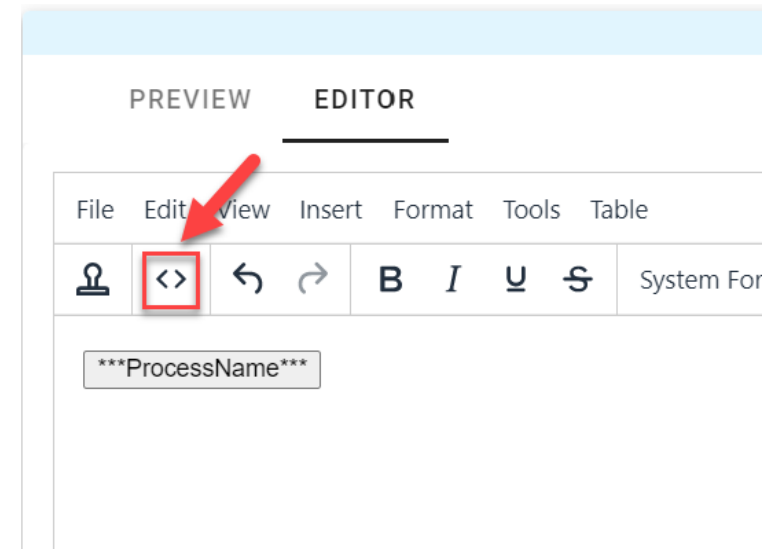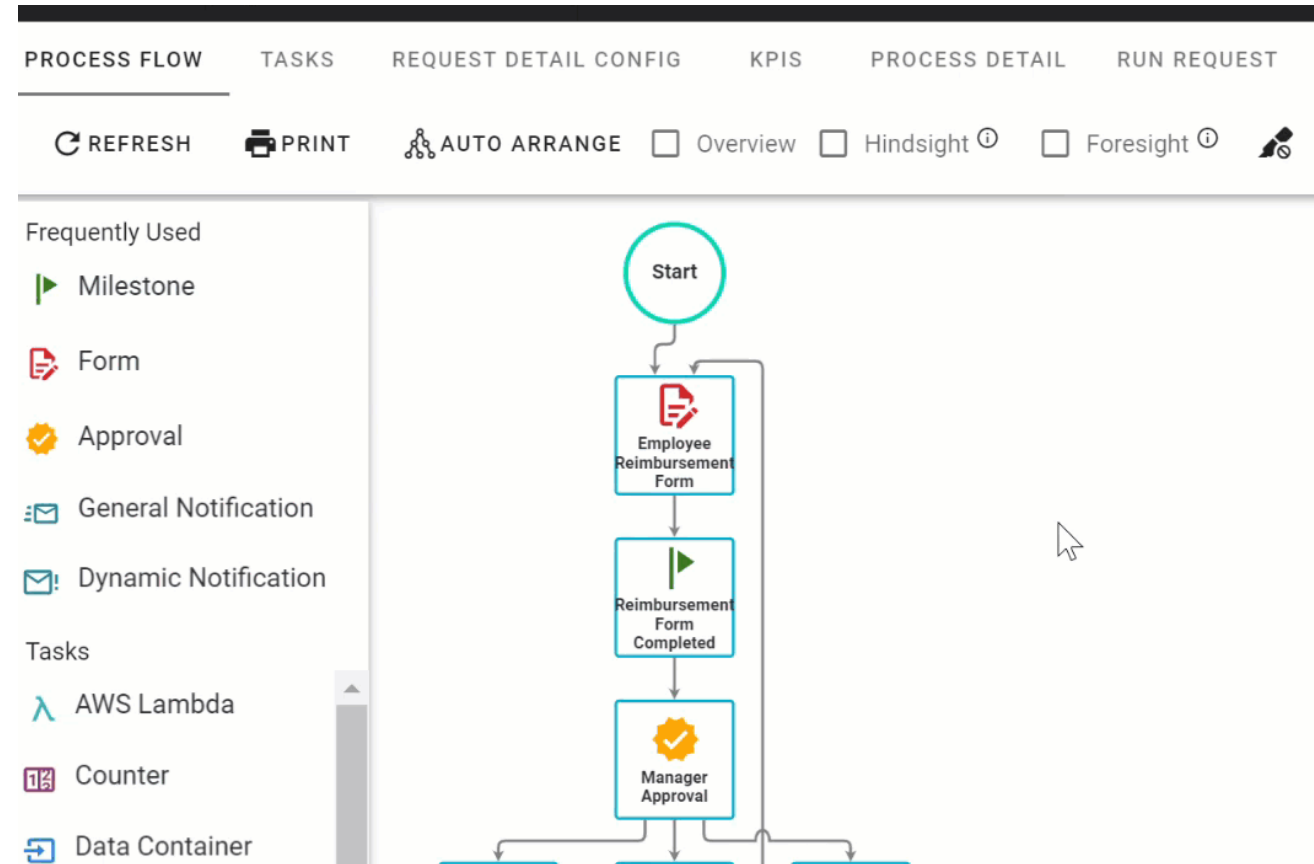## Source Code

```
<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.

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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.

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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>
```

Note: When pasting in the Process SID, erase all the * but leave the single quotes.

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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>
```

Cancel   **Save**

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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

DW — 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

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

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Creating System Messages

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

2. Select **Add Message**.
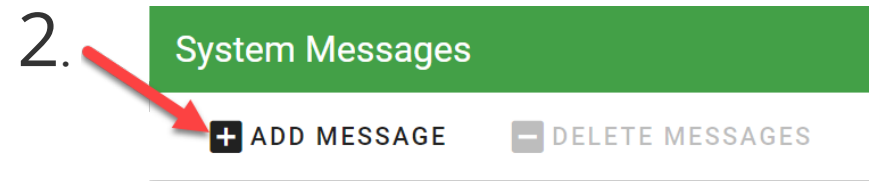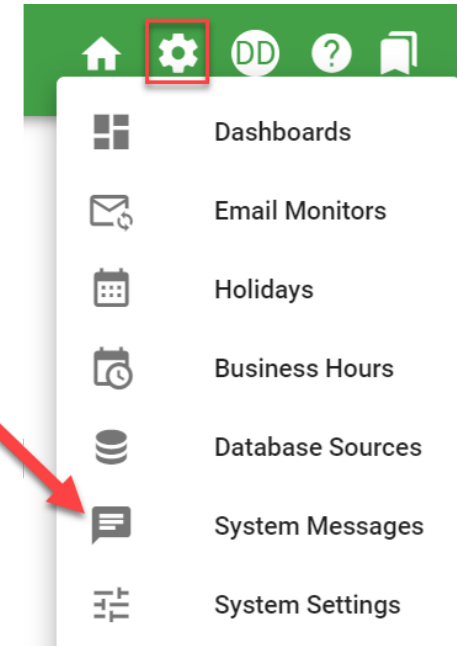
Creating System Messages

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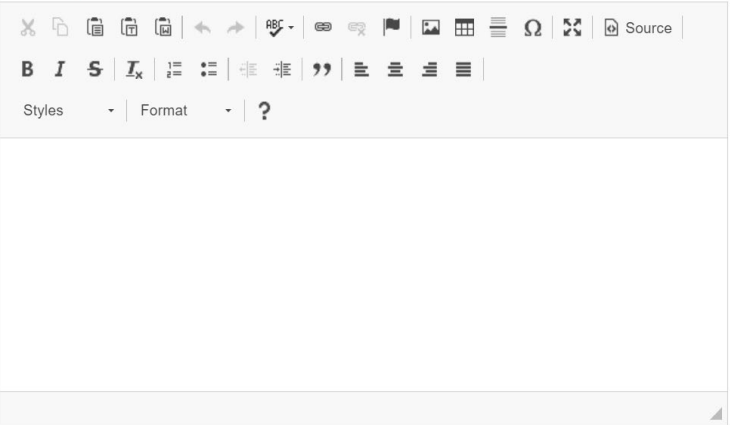
3. Create your System Message by editing the **Subject** Line, the **Body** of the message, and a **Start** and **End** date for the message to appear. Make sure to click **Save**!

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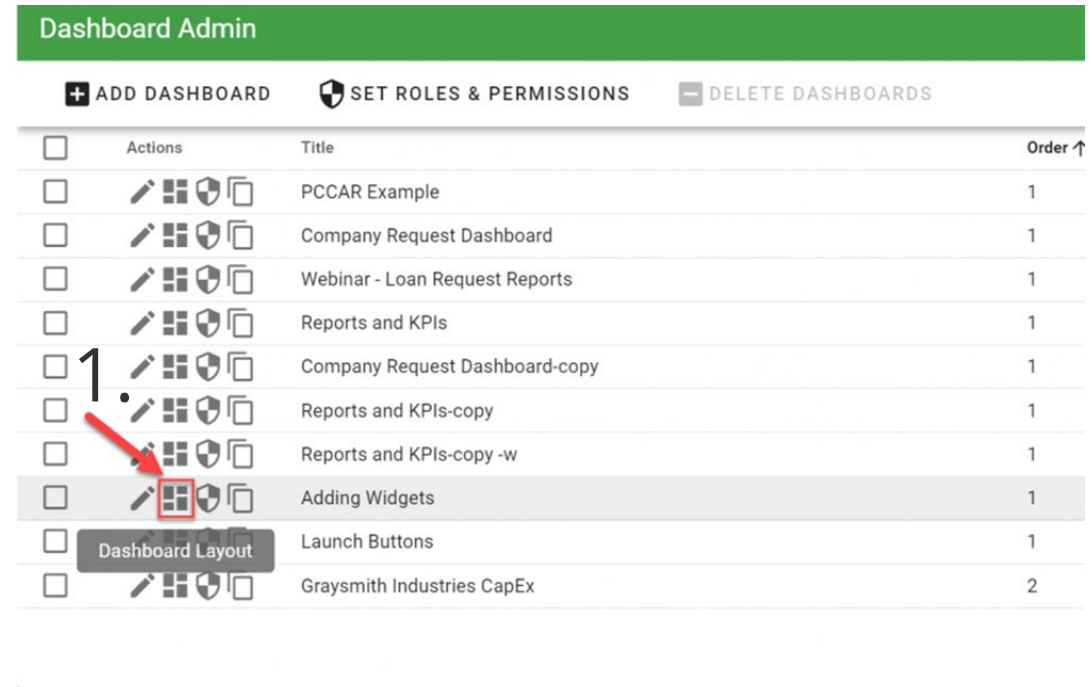
Adding System Messages To Your Dashboard

- 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.**

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Adding System Messages To Your Dashboard

2. Next, select **Add Widget**.
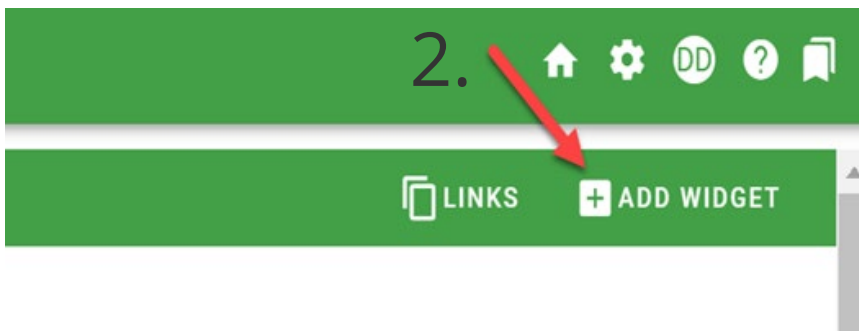
3. For your Widget Type, select **Todays Messages.**

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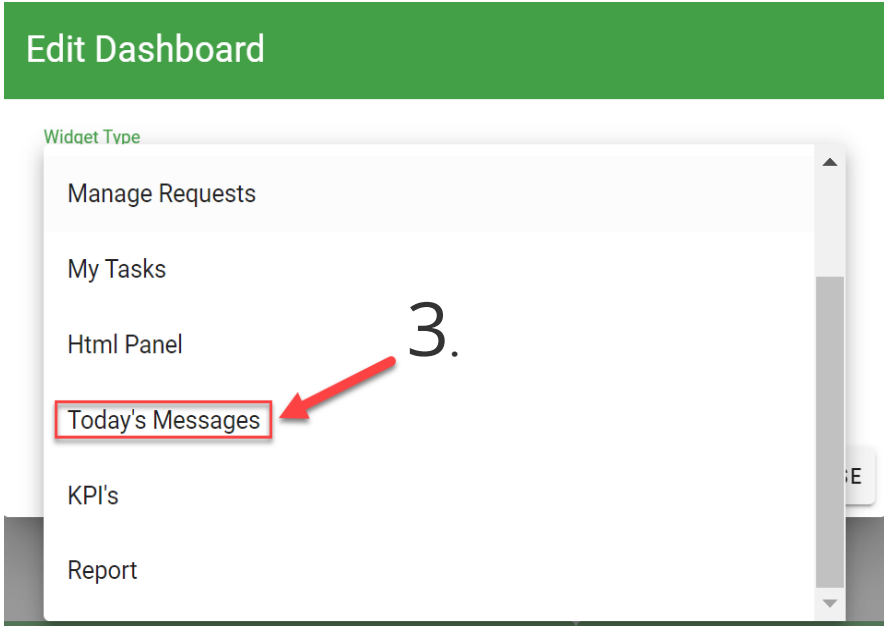
Adding Reports To Dashboards

- 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)

ADD WIDGET   CLOSE

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Assigning Dashboards To A Group

- On your Dashboard list, select **Set Permissions**.

- On the Dashboard Users, select the **Show Members** icon.

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Assigning Dashboards To A Group

Manage Role Members - Dashboard Users

Filter Accounts					**Filter Members**					
	Add	Type	ID	Name		Remove	Type	ID	Name	
☐	⊕	👥	149	A Test Group	☐	⊖	👤	189	Danielle Delregno	
☐	⊕	👤	151	Abby Approver	☐	⊖	👤	196	Michael Del Regno	
☐	⊕	👥	104	ACCA Pricing Team	☐	⊖	👤	107	Mike Raia	
☐	⊕	👥	161	Accounting	☐	⊖	👤	98	Richard Trusky	
☐	⊕	👥	162	Accounts Payable	☐	⊖	👤	145	Tom Martin	
☐	⊕	👥	201	Accounts Receivable						
☐	⊕	👥	1	Administrators						
☐	⊕	👥	101	Affiliate Approvals						
☐	⊕	👤	152	Alex Approver						

Rows per page: 10 ▾   1-5 of 5   « ‹ › »

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.

Q&A

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