

USER GUIDE

Dashboard

Administration Userguide

Table of Contents

| | |
|---|-----------|
| Adding a Widget..... | 3 |
| Adding a Banner Widget..... | 4 |
| Recommended Banner Sizes..... | 5 |
| Adding a Social Media Widget..... | 5 |
| Adding a Video..... | 6 |
| Creating a Custom HTML Widget..... | 8 |
| Customize Dashboard (Turn On/Off and Assign Widgets) | 9 |
| Organize Your Dashboard..... | 10 |
| Manage Your Widgets | 11 |
| Edit a Widget..... | 11 |
| Activate/Inactivate a Widget | 12 |
| Deleting a Widget..... | 12 |

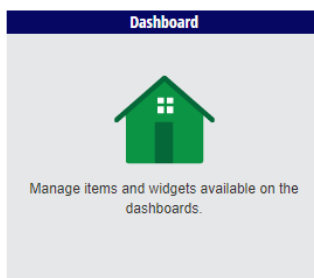
As a company administrator, you have the ability to edit and control what is on your **Dashboard**. The dashboard is the page you land on after you log onto your website. Your dashboard is designed to show you a complete overview of where you stand within your program.

Items on the dashboard are referred to as widgets. A variety of widgets are available for placement by using the **Add Widget** function.

When adding a new widget to your dashboard, it is important to know that it happens in 3 easy steps:

1. **Add Widget:** This allows you to physically add the widget to the system.
2. **Customize Widget:** This allows you to turn on/off your widgets and assign them to different company levels, for example, the entire company or a specific department.
3. **Organize Widget (optional):** This is where you can drag all the widgets on your dashboard and organize them to best fit your company.

To begin, we start off with accessing the **Admin** section via the **Admin** button in the top right-hand corner of your website. If you do not see this button, you may not have the proper administration privileges in the system.



Once you are in the **Administration** section, click on **Dashboard**. Now we will walk through each step involved in adding/editing a widget on your dashboard.

Adding a Widget

To add a widget to your dashboard, select **Add Widget** from the Dashboard page.

It is important to note that **adding a widget is only the first step in the process and you must turn the widget on after adding it**. This is because you can later determine how to add it to your site. For example, you can add the widget to your entire company, you can add it to a specific department, or you can add it just to users within a specific category, etc.

First you will need to select which type of widget you would like to add. You can choose from the following options:

Banner: This allows you to add an image to your desktop. It can be used to communicate company announcements, mission statements, etc. All you will need for this is the image itself. For banners, you can select a widget size that best suits the image being uploaded. Common sizes are 1x2 or 1x4.

Blog Posts: This allows you to add a widget that will display the three most recent blog posts. If there are no blog posts to be displayed, the widget will state that none could be found. For this widget, you will need an existing Blog Posts feature.

Custom HTML Widget: This allows you to create a custom widget for your company to display any information you feel is important. It could be a company newsletter or section on

your marketing website. We supply a blank widget and you can use an HTML editor toolbar to customize it any way you would like.

Facebook: This allows you to link a Facebook account and display its News Feed on your dashboard. All you will need is the Facebook Page URL for the account you would like to link. The recommended size for this widget is 1x1.

Instagram: This allows you to link an Instagram account and display its posts on your dashboard. All you will need is the Instagram User ID and Access Token for the account you would like to link. The recommended size for this widget is 1x1.

My Links: This allows you to add a widget that display a list of icons that will link the user to websites of your choice. These could be external websites, or specific pages or features in Systems 24-7. For this widget, you will need an existing My Links feature.

Twitter: This allows you to link a Twitter account and display its Twitter Feed on your dashboard. All you will need is the Twitter Handle for the account you would like to link. The recommended size for this widget is 1x1.

Video: This allows you to link a video that will automatically play on the dashboard. This could be a welcome video to the system or an informative video from YouTube. All you will need is the Video Link URL and an image to upload in case the link to your video expires. The recommended size for this widget is 1x2.

Adding a Banner Widget

Start by selecting **Banner** as the **Widget Type** from the dropdown menu. Next, you will need to name your widget and add a description (optional).

Widget Type: Banner

Widget Name: * en fr
Mission Statement Banner

Widget Description: en fr
This banner image states our company mission statement.

To upload your **Banner Image** select the **Browse** button. Find the file on your computer and double-click to select it.

Banner Image * en fr

Browse... Sample Banner Image...

Select the **Widget Size** for your selection by using the dropdown menu. You have the option of adding a 1x1, 1x2, 1x3 and 1x4 widget. This is typically determined by the size of the banner you are uploading. For help with picking a widget size, please see the **Recommended Banner Sizes** section below.

Widget Size: * 1x1

Click **Add Dashboard Widget** once you are finished. This adds the widget to your bank of available widgets and is ready to be assigned.

For help with assigning a widget, please refer to the **Customize Widget** section of this user guide for step by step instructions.

RECOMMENDED BANNER SIZES

The dashboard is created based on a grid system which is 4 blocks wide by an infinite number of blocks tall.

Here are the recommended banner dimensions for each widget size:

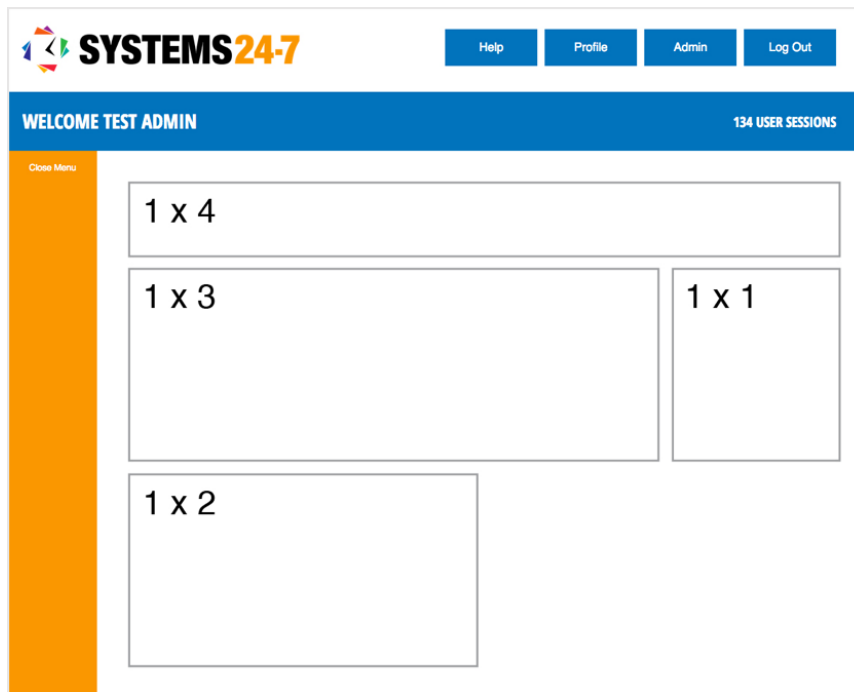
1x1 (Square): 410px x 455px

1x2 (Half of Dashboard): 835px x 455px

1x3 (Two Thirds of Dashboard): 1265px x 455px

1x4 (Full Width of Dashboard): 1685px x 175px

Here is a visual of the dashboard grid system to help you.



Adding a Social Media Widget

All social media widgets operate the same, they just require different account information so we will use Facebook as an example.

Start by selecting **Facebook** as the **Widget Type** from the dropdown menu. Next, you will need to name your widget and add a description (optional).

Widget Type: Facebook

Widget Name: * MOL Facebook

Widget Description: This widget provides a live feed of the MOL Facebook page.

Copy and paste the Facebook Page URL into the URL field.

Facebook Page URL: * https://www.facebook.com/OntarioMini

Select the **Widget Size** by using the dropdown menu. 1x1 widgets are recommended for social media accounts.

Widget Size: * 1x1

Click **Add Dashboard Widget** once you are finished. This adds the widget to your bank of available widgets and is ready to be assigned.

For help with assigning a widget, please refer to the **Customize Widget** section of this user guide for step by step instructions.

Adding a Video

Start by selecting **Video** as the **Widget Type** from the dropdown menu. Next, you will need to name your widget and add a description (optional).

Widget Type: Video

en fr

Widget Name: * Rod Stickman - Slips, Trips and Falls

en fr

Widget Description: This is a safety video on slips, trips and falls in the workplace.

Copy and paste the Video Link URL into the URL field.

en fr

Video Link URL: * https://youtu.be/Fr_dI8yON2U

The system requires you to upload a **Missing Video Placeholder Image** in case your video link expires. To upload an image, select the **Browse** button. Find the file on your computer and double-click to select it.

en fr

Missing Video Placeholder Image * Browse... Missing Video Image.jpg

Select the **Widget Size** by using the dropdown menu. The recommended size for videos is 1x2.

Widget Size: * 1x2

Click **Add Dashboard Widget** once you are finished. This adds the widget to your bank of available widgets and is ready to be assigned.

For help with assigning a widget, please refer to the **Customize Widget** section of this user guide for step by step instructions.

Adding a Blog Posts Widget

Start by selecting **Blog Posts** as the **Widget Type** from the dropdown menu. Next, you will need to name your widget and add a description (optional).

Widget Type:

Widget Name: *

Widget Description:

If you have multiple Blog Posts features, you will need to select one here. If you only have one, the system will select this feature by default.

Blog Post Feature:

Select the **Widget Size** by using the dropdown menu. 1x1 or 1x2 widgets are recommended for Blog Posts widgets.

Widget Size: *

Click **Add Dashboard Widget** once you are finished. This adds the widget to your bank of available widgets and is ready to be assigned.

For help with assigning a widget, please refer to the **Customize Widget** section of this user guide for step by step instructions.

Adding a My Links Widget

Start by selecting **My Links** as the **Widget Type** from the dropdown menu. Next, you will need to name your widget and add a description (optional).

Widget Type:

Widget Name: *

Widget Description:

If you have multiple My Links features, you will need to select one here. If you only have one, the system will select this feature by default.

My Link Feature: *

My Links ▼

Select the **Widget Size** by using the dropdown menu. The widget size here depends on the number of links you want to display. The more links you have, the larger you will want this widget to be.

Widget Size: *

1x1 ▼

Click **Add Dashboard Widget** once you are finished. This adds the widget to your bank of available widgets and is ready to be assigned.

For help with assigning a widget, please refer to the **Customize Widget** section of this user guide for step by step instructions.

Creating a Custom HTML Widget

Start by selecting **Custom HTML Widget** as the **Widget Type** from the dropdown menu. Next, you will need to name your widget and add a description (optional). As you fill in information you will see the widget preview update.

Widget Type:

Custom HTML Widget ▼

Widget Name: *

en fr

Monthly Newsletter

Widget Description:

en fr

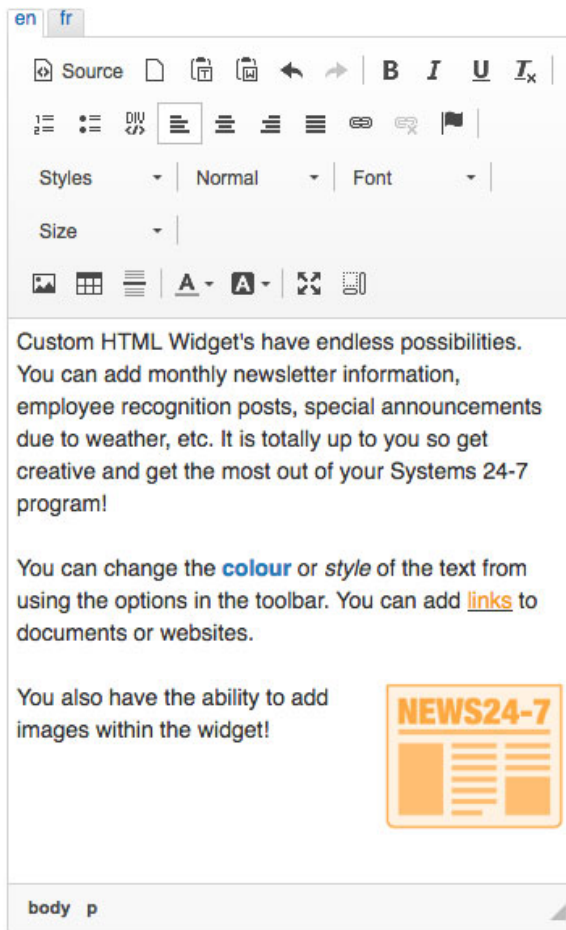
This widget gives a preview to our company newsletter and is linked to our website for the full version.

Select the **Widget Size** by using the dropdown menu. The recommended size for is either 1x1 or 1x2 but really it is dependent on the content you are adding.

Widget Size: *

1x1 ▼

Now you can use the HTML editor to build your custom widget. Copy and paste your content or manually type it in and then use the toolbar to add images, links, or just pretty-up the content. The widget preview will update as you make changes.



Monthly Newsletter

Custom HTML Widget's have endless possibilities. You can add monthly newsletter information, employee recognition posts, special announcements due to weather, etc. It is totally up to you so get creative and get the most out of your Systems 24-7 program!

You can change the **colour** or *style* of the text from using the options in the toolbar. You can add [links](#) to documents or websites.

You also have the ability to add images within the widget!



Click **Add Dashboard Widget** once you are finished. This adds the widget to your bank of available widgets and is ready to be assigned.

For help with assigning a widget, please refer to the **Customize Widget** section of this user guide for step by step instructions.

Customize Dashboard (Turn On/Off and Assign Widgets)

Widgets on the system can be assigned in different ways to your company. You can select a specific organizational level or assign to a specific category. To customize a default widget or a widget you created, select **Customize Dashboard** from the Dashboard administration page.

By default, you will be shown all the widgets available to your company that you have permissions to. Select the level you wish to edit by using the radio buttons along the top of the page. In our example we are going to use company-wide.

☒ Company ☐ Company Level ☐ Permission Type ☐ User

Each widget is organized by type and can have several widgets within each category. You have the ability to turn on and off each widget, as well give users the ability to move or remove widgets from their own dashboard.

On/Off Turn All On

Allow User To Move Turn All On

Allow User To Remove Turn All On

Find the Widget you wish to edit and make your selection. We are going to turn on the Video widget we added. If your widget type has more than one widget or if you added a custom widget, you will need to first turn on the **Widget Type** and then turn on the **Widget** itself. This can come in handy with items such as seasonal banners. You can keep all banners on the system and turn them on/off depending on the time of year.

The screenshot shows a configuration interface with two rows of toggle switches. The first row is for a 'Video' widget, with a blue dot in the 'On' position and an empty circle in the 'Off' position. The second row is for a widget named 'Rod Stickman', with a blue dot in the 'On' position, an empty circle in the 'Off' position, a blue dot in the 'No' position of a 'Yes/No' pair, and an empty circle in the 'Yes' position of another 'Yes/No' pair.

Once you have made your changes, scroll to the bottom of the page and select **Save**. Your dashboard changes are now live.

For help with organizing your dashboard, please refer to the **Organize Dashboard** section of this user guide for step by step instructions.

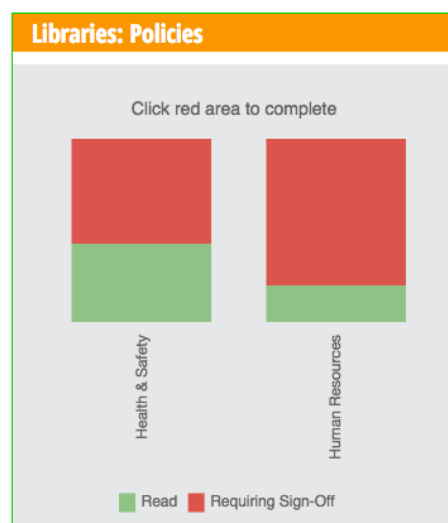
Organize Your Dashboard

As an administrator, you have the ability to rearrange the widgets on the dashboard so they appear in an order that makes sense for your company or organizational level. To get started, select **Organize Dashboard** from the Dashboard administration page.

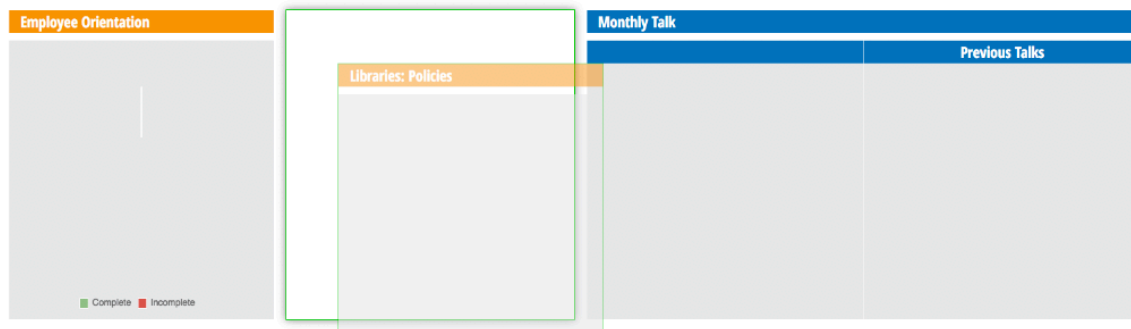
Similar to the **Customize Dashboard** function, you can rearrange the widgets by company level. By default, you will see your company dashboard (or whichever company level you have permissions to) but you can use the radio buttons along the top of the page to organize other company levels or categories.

☒ Company ☐ Company Level ☐ Permission Type ☐ User

To organize your dashboard widgets, simply drag and drop the placement of the widget into its correct location. Start by hovering your mouse over the widget you wish to move and you will notice a green border appears around it.



Click and drag the widget to its intended location and all other widgets will shuffle to make room. Once you have found the correct location, release the button of your mouse and this will drop the widget into place.



Continue to organize until you are happy with the dashboard layout and then scroll to the bottom of the page and select **Save**.

Manage Your Widgets

As an administrator, you can use the manage widget function to edit or delete widgets from the system. You can only edit or delete widgets that have been added by your company, all default widgets will be inaccessible.

To get started, select **Manage Widgets** from the Dashboard administration page. Here you will find a list of all widgets added by your company that you have permissions to. You can edit, activate/inactive, or delete a widget from the system.

Below we walk through each function with step by step instructions.

Edit a Widget



Select the pencil icon next to the widget you wish to edit. In our example, we are going to edit our company's Holiday Banner.

Just like when you added the widget, you can update the **Widget Name**, **Widget Description**, **Widget Size**, and the other elements specific to the widget type you selected.

Widget Name: * en fr

Widget Description: en fr

Banner Image * en fr Preview: 1530183034241.57.1_1525257670978.99.1_Dunk.png

Widget Size: * 1x2

Status ☒ Active ☐ Inactive

Make any necessary changes and select **Update Dashboard Widget**.

Activate/Inactivate a Widget

Under **Authoring Options** you will find an open or closed eye icon next to each widget. To activate or inactivate a widget, simply click on this icon.

Note: By making a widget inactive does not delete it from the system, it only hides it from the **Organize Dashboard** page so that it cannot be assigned.



This icon means the widget is currently active. By clicking on it, you will inactivate the widget from the system.



This icon means the widget is currently inactive. By clicking on it, you will activate the widget on the system.

Deleting a Widget



Under **Authoring Options** you will find an X icon next to each widget. To permanently delete a widget from the system, select this icon.

Once a widget is deleted, it cannot be brought back so make sure you are 100% on your decision.