infodesk

InfoDesk User Guide
Embed Dashboard on Microsoft Teams

Last updated on May 31, 2024

This user guide explains how to integrate Dashboards on Microsoft Teams.

Guide for Portal Admins and Dashboard Owners.

Introduction

A smart way to make sure that your stakeholders don't miss any news from your InfoDesk platform is to integrate your Dashboard on Teams.

You can integrate Dashboards and Dashboard Widgets on other websites too. Contact your InfoDesk Account Manager or Customer Success to discuss your needs and all possibilities.

Create and prepare your Dashboard before you embed the Dashboard.

Integration Prerequisites

When embedding Dashboards on other websites you need an authentication mechanism. The recommended authentication mechanism is single sign-on, SSO. An alternative authentication mechanism is Key Authentication.

The main difference between SSO and Key Authentication is that SSO allows personalized dashboards and interaction, while Key Authentication doesn't. This means that interactive Dashboard widgets such as the Contribute widget and Subscribe to Personal Alerts from the Post list widget do not work with Key Authentication.

infodesk

Website	**Support**	Copyright 2024 © InfoDesk.
www.infodesk.com	support@infodesk.com	All rights reserved.

SSO

The easiest way to integrate is to use SSO which allows you to seamlessly access your portal from your intranet without the need for a username and password. The user is not required to have an InfoDesk account, and it can be created automatically.

Contact your InfoDesk Account Manager or Customer Success for more information and assistance with the SSO implementation.

Machine Users/Key Authentication

If you don't have SSO implemented, you can use Key Authentication to give your stakeholders access to the Dashboard on other websites and platforms.

A prerequisite is that a dedicated Dashboard user with a generated authentication key, a so-called Machine user, is created on the User page in Admin.

You need help from InfoDesk Support to create the Machine user.

Contact [InfoDesk Support](#) for more information and assistance.

How to Embed a Dashboard on Teams

In your InfoDesk Portal:

With SSO implemented:

To obtain the InfoDesk Dashboard URL, please follow these steps:

1. Log in to your InfoDesk account at https://ciportal.com

2. Navigate to the Dashboard page and select a Dashboard.

3. On the Dashboard card, click the More button (three dots) and select the **Embed Dashboard** option.
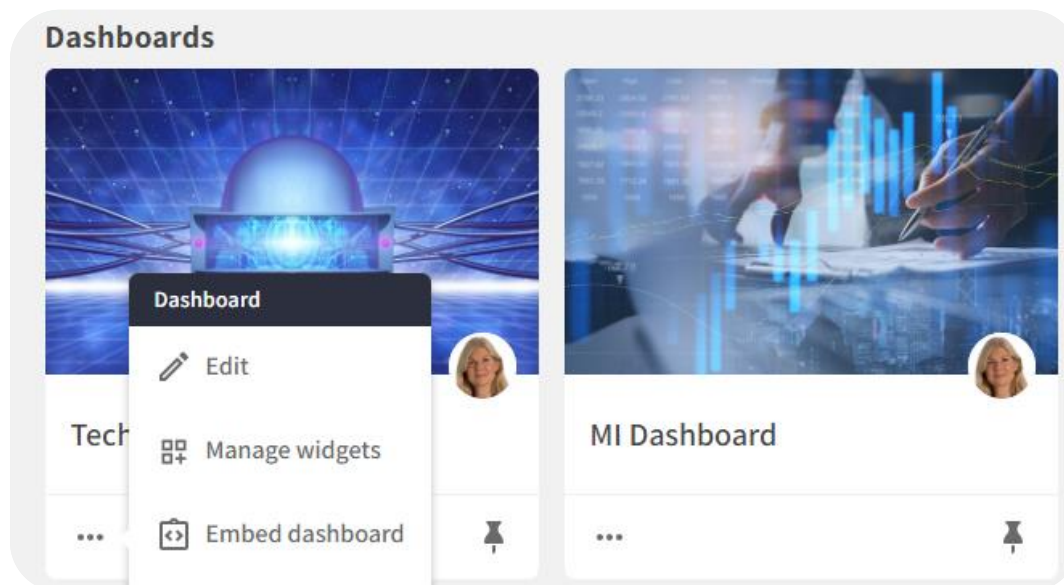
4. **Copy** the provided **URL** from the *upper* text bar on the **Embed Dashboard** pop up. (The URL starts with *https://api.ciportal.com/sso/* ...)

5. Follow the instructions under the **In Teams** section below to paste the URL when setting up the embedded Dashboard on Teams.

Embed dashboard ✕

Single sign on (SSO)   Key authentication

What is SSO?

A dashboard can be integrated on an external website, e.g. your intranet. The recommended authentication mechanism is SSO. A prerequisite is that single sign-on (SSO) is set up between the external website and Wide Narrow. The user will be logged on with a personal account and see content corresponding to what would be seen in Wide Narrow. Different users can therefore possibly see different content in the same dashboard.

To embed the dashboard on the website

1. Add an html <iframe />
2. Set the source (src) to the Embedding URL with SSO

```
https://api.ciportal.com/sso/saml/infodesk?go=%2Fdashboard%2F8903
```

Example of an <iframe /> for embedding this dashboard

```
<iframe title="Dashboard from CiPortal" src="https://api.ciportal.com/sso/saml/infodesk?go=%2Fdashboard%2F8903" height="800px" width="800px" />
```

Without SSO implemented

If you don't have SSO implemented, you need assistance from InfoDesk to implement SSO or to create a Machine user for the Key Authentication method.

Choose the **SSO** or **Key Authentication** tab on the Embed Dashboard pop-up to read more about the options and contact InfoDesk Support for assistance.

SSO

If you don't have SSO implemented, it will look like this on the **Embed Dashboard** pop-up:

infodesk

Website
www.infodesk.com

Support
support@infodesk.com
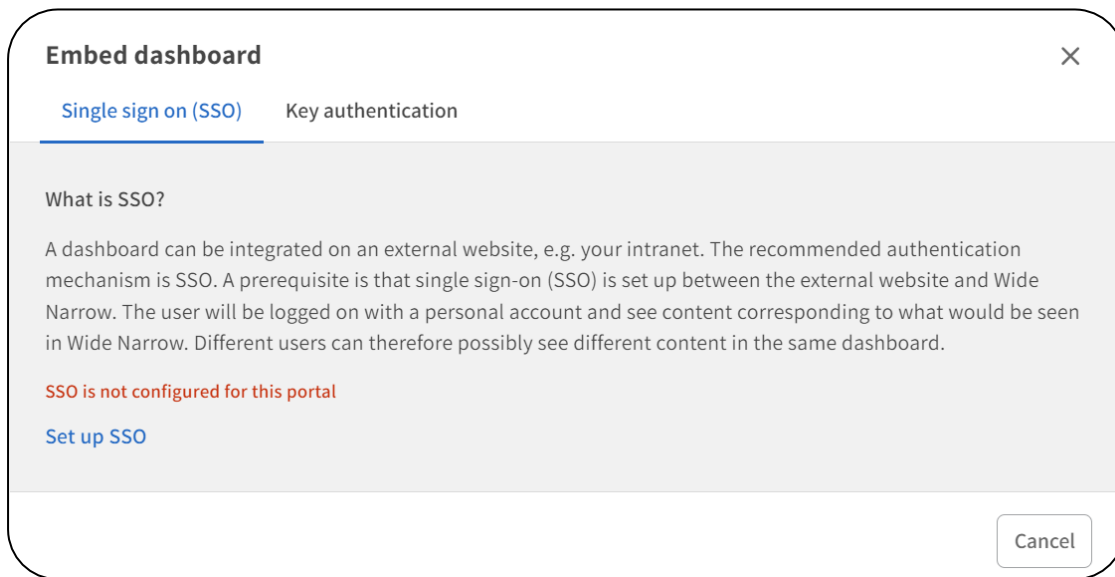
Read the instructions under **Set up SSO** and contact your InfoDesk Account Mangar, Customer Success or InfoDesk Support for assistance.

Key Authentication

You can use Machine Users/Key Authentication to give your stakeholders access to the Dashboard on Teams.

You need help from InfoDesk Support to create the Machine user.

When the Machine user is created by InfoDesk Support:

1. Go to the **User** page in **Admin** and select **Machine Users**.

2. Open the Machine User account and click the **Display Key** button.

3. **Copy** the Machine User Key.

4. Navigate to the Dashboard page and select a Dashboard.

5. On the Dashboard card, click the **More** button (three dots) and select the **Embed Dashboard** option.

6. Select the **Key Authentication** tab on the **Embed Dashboard** pop up.

infodesk

Website
www.infodesk.com

Support
support@infodesk.com

Copyright 2024 © InfoDesk.
All rights reserved.

7. Replace "**REPLACE_WITH_KEY**" in the URL displayed in the top text field, with the generated Machine User Key.

8. Copy the entire **URL** from the top text field in order to use it on Teams.

Follow the instructions under the **In Teams** section below to paste the link when setting up the embedded Dashboard on Teams.

Embed dashboard   ✕

Single sign on (SSO)   **Key authentication**

What is key authentication?

A dashboard can be integrated on an external website, e.g. your intranet. The recommended authentication mechanism is SSO. An alternative authentication mechanism is Key authentication. A prerequisite is that a dedicated Dashboard user (a so-called "Machine user") is set up with a generated key.

Generate a key   ⌄

The person viewing the dashboard will be authenticated to the dashboard as the shared Dashboard User and will have less possibilities to interact. All persons viewing a Key authenticated dashboard will see the same content.

To embed the dashboard on the website

1. Add an html <iframe />

2. Set the source (src) to below and make sure to replace REPLACE_WITH_KEY with your key

```
https://embed.ciportal.com/dashboard/8602?token=REPLACE_WITH_KEY
```
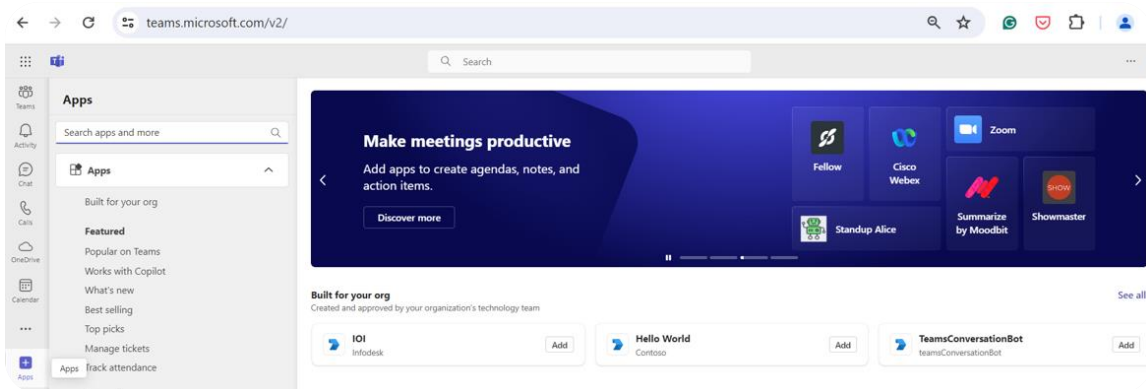
Example of an <iframe /> for embedding this dashboard

```
<iframe title="Dashboard from CiPortal" src="https://embed.ciportal.com/dashboard/8602?token=REPLACE_WITH_KEY" height="800px" width="800px" />
```

In Microsoft Teams

You can add the InfoDesk Dashboard app directly from the Teams context you're working in, whether you're in a chat or a channel.
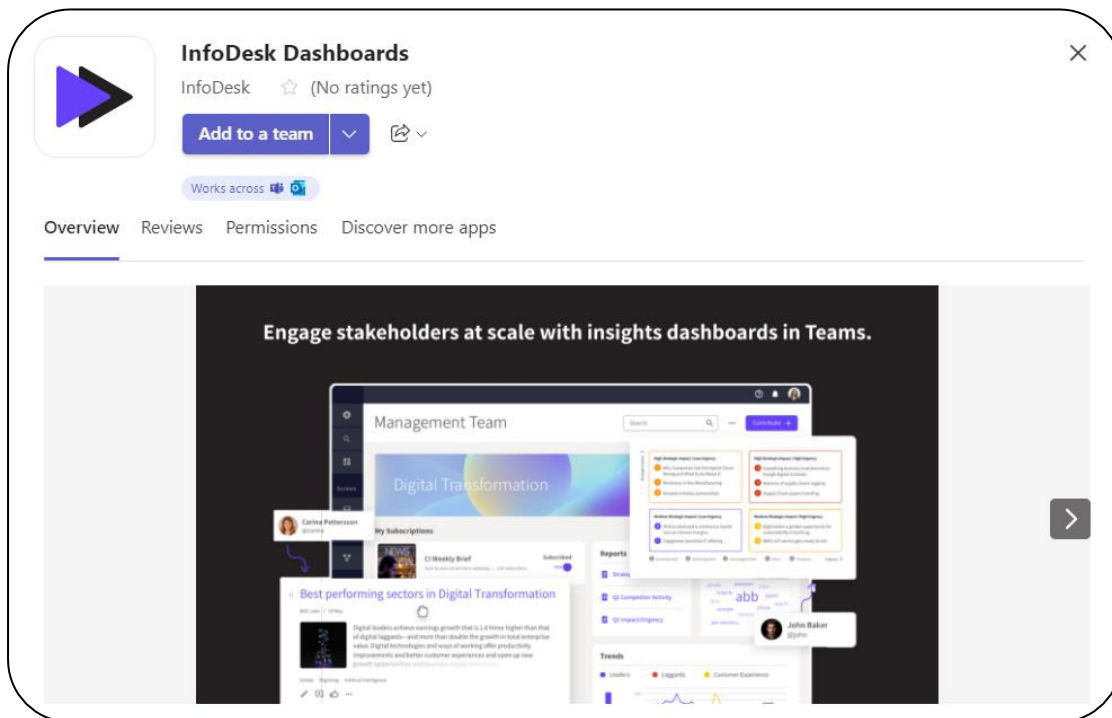
1. Log into **Microsoft Teams**.

2. Select **Apps** from the left side menu in Teams and type "**InfoDesk Dashboards**" in the **Search apps and more** search bar.
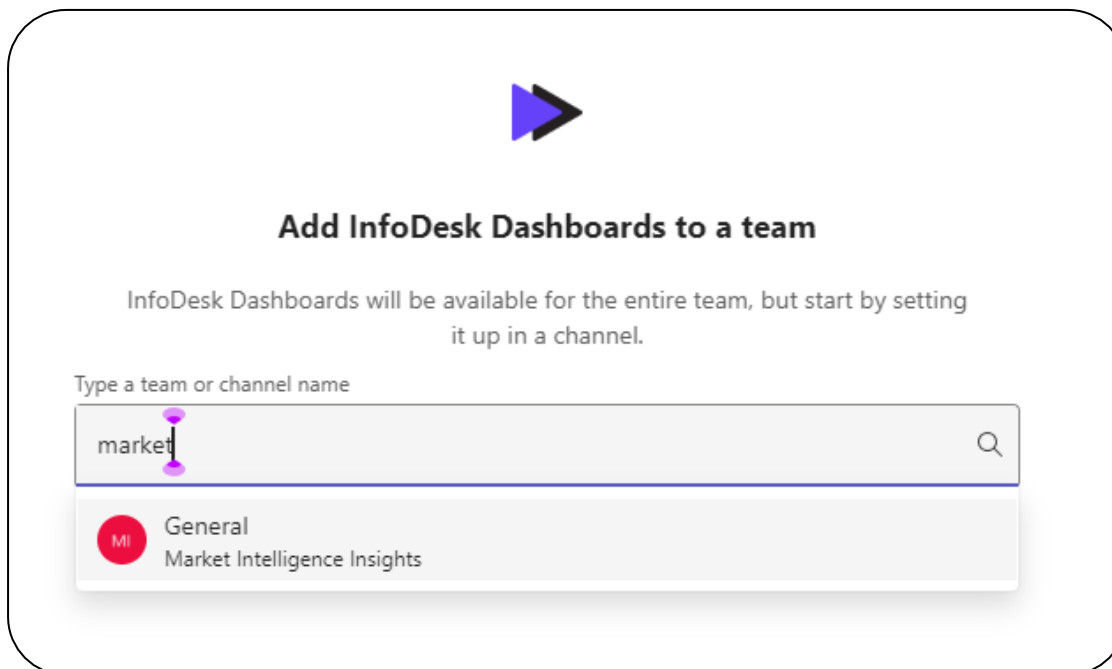

3. The InfoDesk Dashboard app will now appear on the screen.
   Click the **Add** button on the InfoDesk Dashboards app.
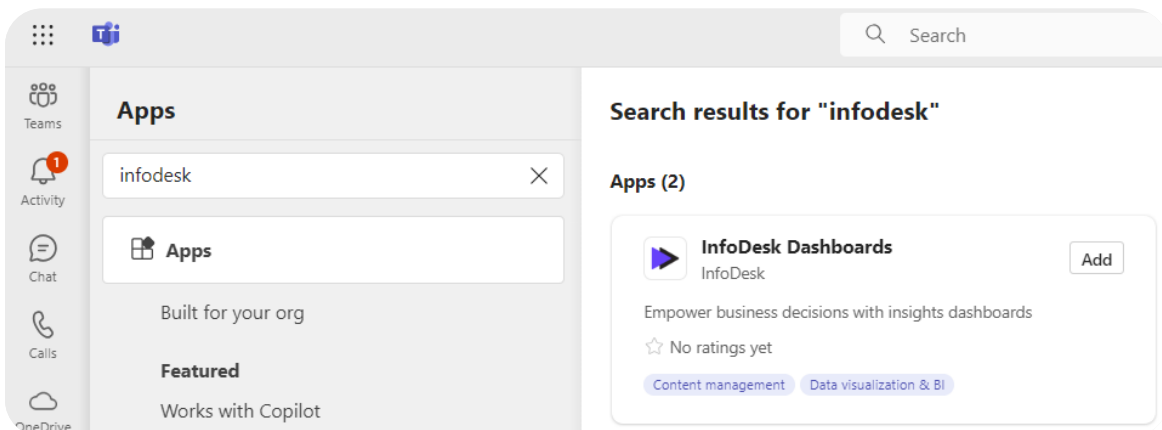
4. Select **Add to Team** or **Add to chat** in the dropdown and then select the channel or chat where you want to add the InfoDesk Dashboard app.

infodesk

Website
www.infodesk.com

Support
support@infodesk.com

Copyright 2024 © InfoDesk.
All rights reserved.

5. Type and select a Team or Chat in the search bar.
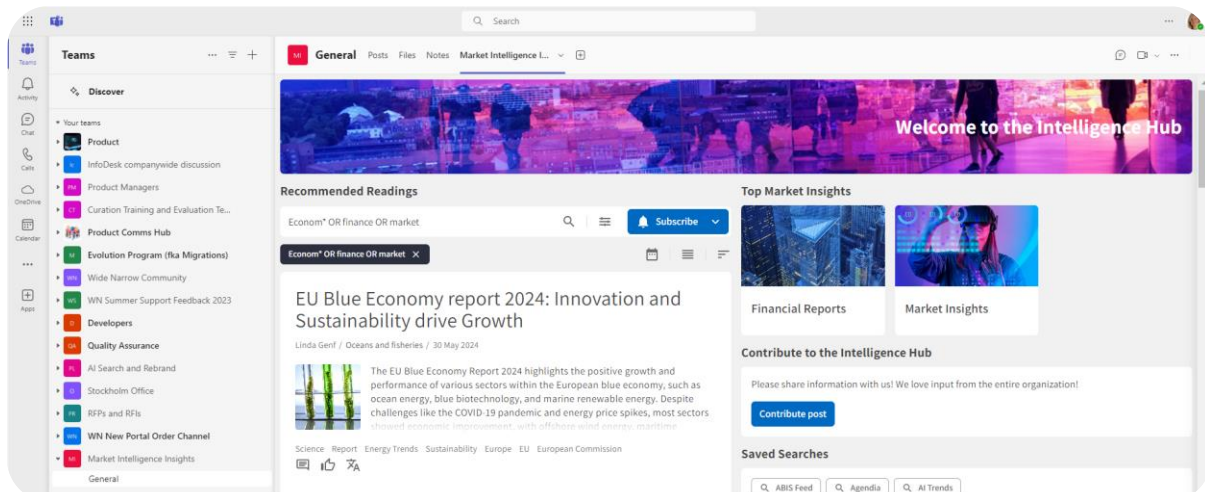
6. Click on the **Set up a tab** button.

7. Name your Dashboard tab in the **Tab name** field. We recommend a name that helps the viewers to easily find the embedded dashboard.

8. In the **Dashboard URL** field: Paste the Dashboard URL you copied from the SSO or Key Authentication page in your InfoDesk platform and then click Save.

9. The Dashboard will now be available from the named tab in the selected Teams channel or chat. Open the tab to view the embedded Dashboard.

infodesk

Website
www.infodesk.com

Support
support@infodesk.com

Copyright 2024 © InfoDesk.
All rights reserved.

Don't forget to make your Teams channel available for others. Notify your stakeholders and invite them as members to your channel.

You can add more Dashboards to the same channel. Just repeat the steps above. Each Dashboard will have its own tab.

Edit an Embedded Dashboard

Open the tab drop-down to change the tab name, expand the tab, or make any other changes to the settings in Teams.
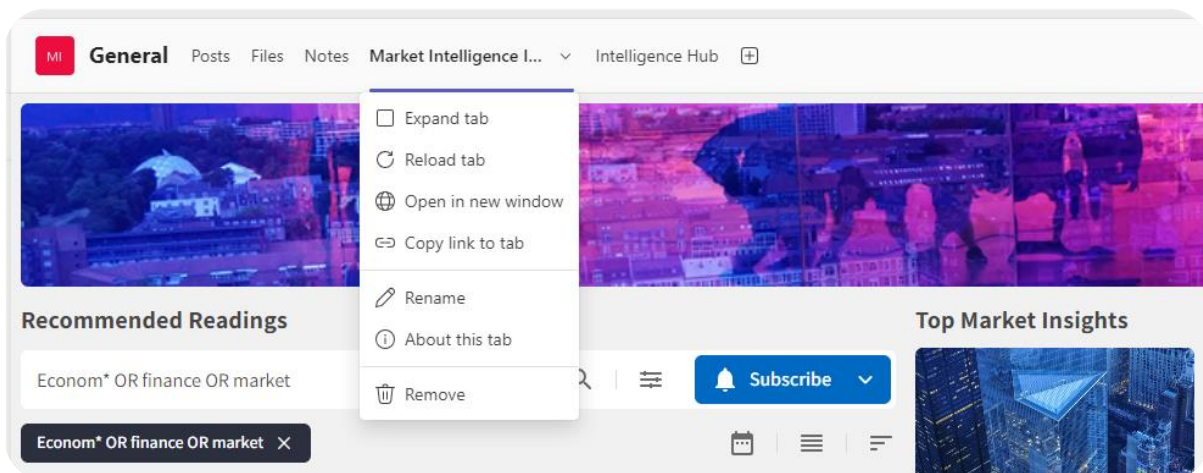
Any modifications to the Dashboard and dashboard widgets layouts and content must be made on the Dashboard within your InfoDesk platform.

Website
www.infodesk.com

Support
support@infodesk.com

Copyright 2024 © InfoDesk.
All rights reserved.

1. Open your Dashboard and click the More button (three dots).

2. Select **Edit** to edit the layout and user access to the Dashboard.

3. Select **Manage widgets** to edit the widgets or add and remove widgets from the dashboard.

Remove an Embedded Dashboard from Teams

Open the tab drop down and select the **Remove** option to remove the Dashboard tab from Teams.

Website
www.infodesk.com

Support
support@infodesk.com

Copyright 2024 © InfoDesk.
All rights reserved.