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InfoDesk User Guide
Integrate Dashboard on SharePoint

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This user guide explains how to integrate Dashboards on SharePoint.

Introduction

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

You can integrate the entire Dashboard or select specific Dashboard widgets to share on SharePoint.

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

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support@infodesk.com

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Integration Prerequisites

SSO

The easiest way to integrate is to use single sign-on (SSO). SSO 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 account in Wide Narrow, and it can be created automatically.

Machine Users/Key Authentication

If you don't have SSO access to Wide Narrow, you can use Machine Users/Key Authentication to give your stakeholders access to content from Wide Narrow on other platforms. Contact InfoDesk Support for more information.

How to Embed a Dashboard on SharePoint
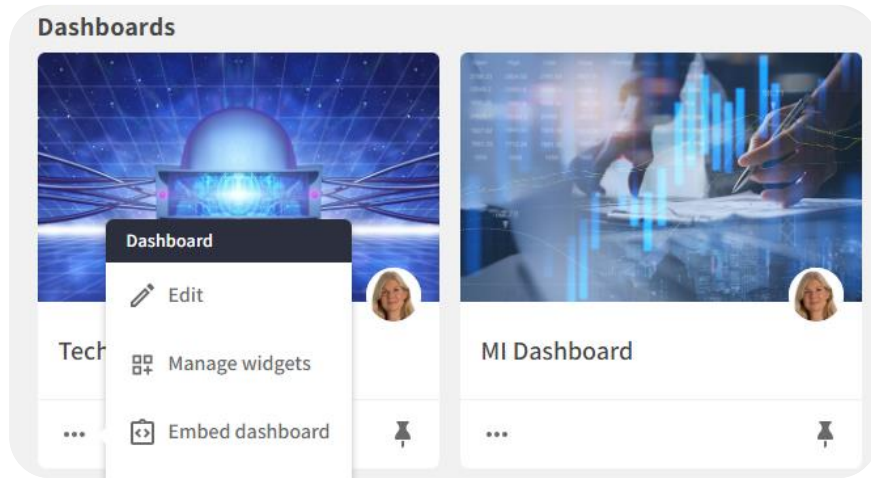
In your Wide Narrow Portal:

Only Portal Admins and Dashboard Owners and Writers have access to the Dashboard edit mode. Only Portal Admins have access to Admin

STEP 1

1. Navigate to the Dashboard overview page.
2. Optionally, click the **New dashboard** button to create a new Dashboard, or select an existing Dashboard.

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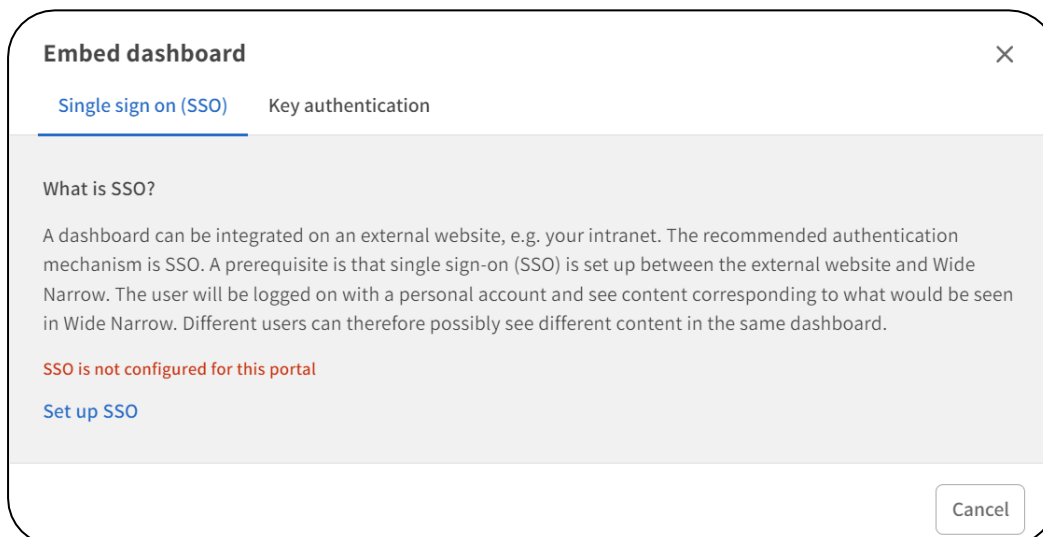

STEP 2

On the Embed Dashboard pop-up:

Choose the **SSO** or **Key Authentication** tab to prepare and retrieve the embedded dashboard URL to use on SharePoint.
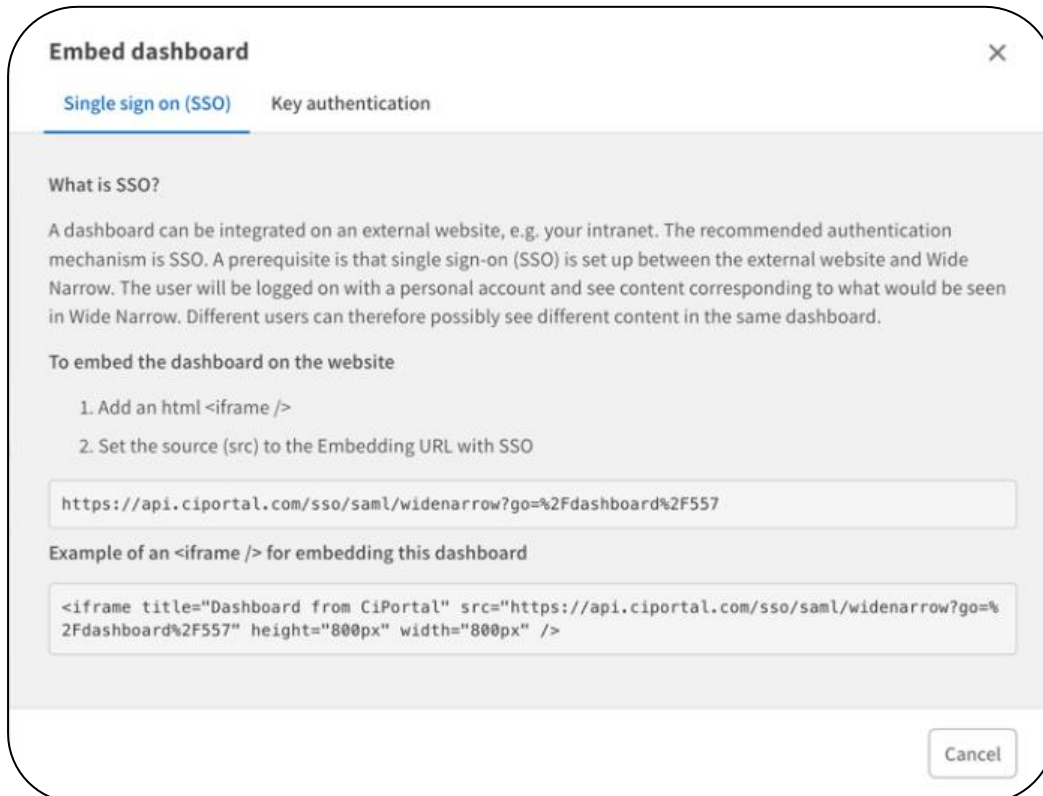
Contact [InfoDesk Support](#) if you need assistance.

Please note that if you don't have SSO in place, it will look like this:

With SSO in place:

Copy the text in the text bar under "Example of an <iframe /> for embedding this dashboard" on the Embed dashboard pop up.

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

Key Authentication:

Follow the instructions on the Key Authentication page to set up a Machine user with a generated key and to retrieve the link to embed the dashboard on a SharePoint page:

1. Click the **Generate key** tab on the "Embed widget" pop-up and follow the instructions to generate the key.

2. Replace "REPLACE_WITH_KEY" with the generated key in the embedded widget URL in the top text field. Copy the link to use on SharePoint.

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

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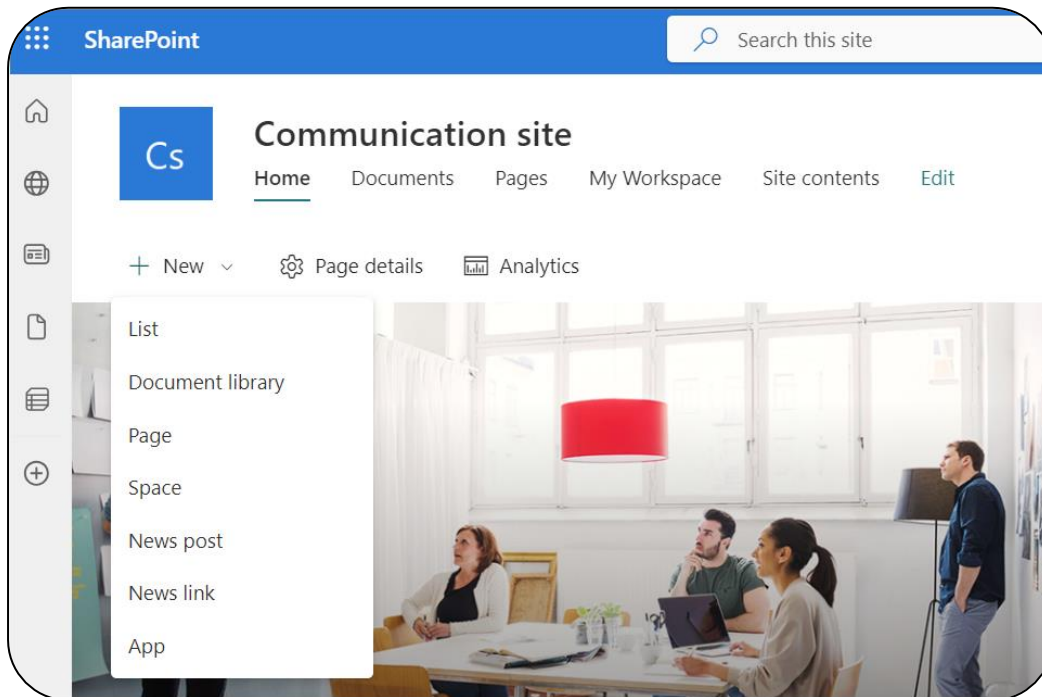2. Set the source (src) to below and make sure to replace REPLACE_WITH_KEY with your key

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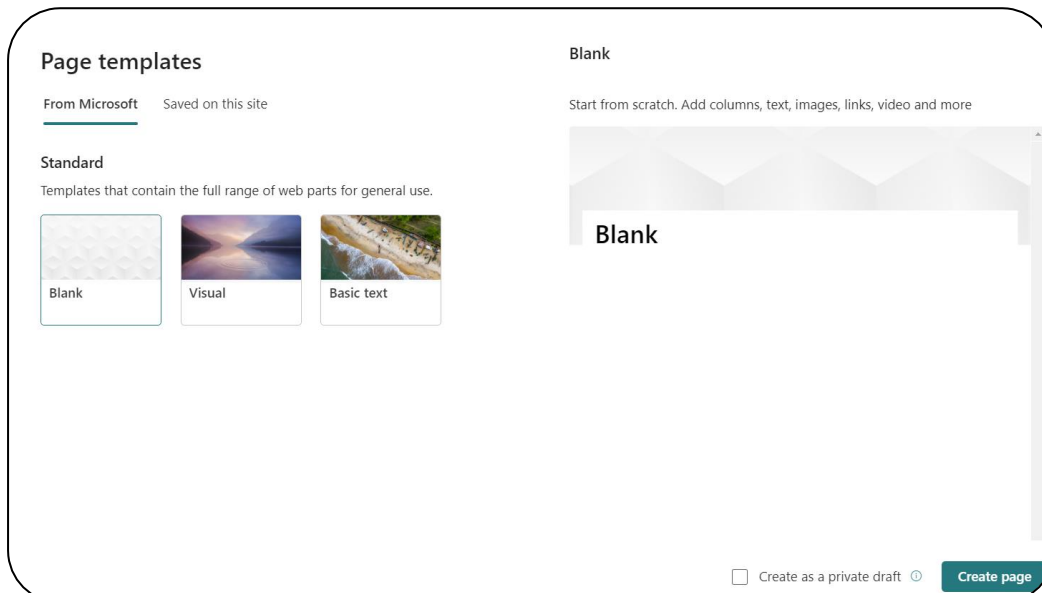
Example of an <iframe /> for embedding this dashboard

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

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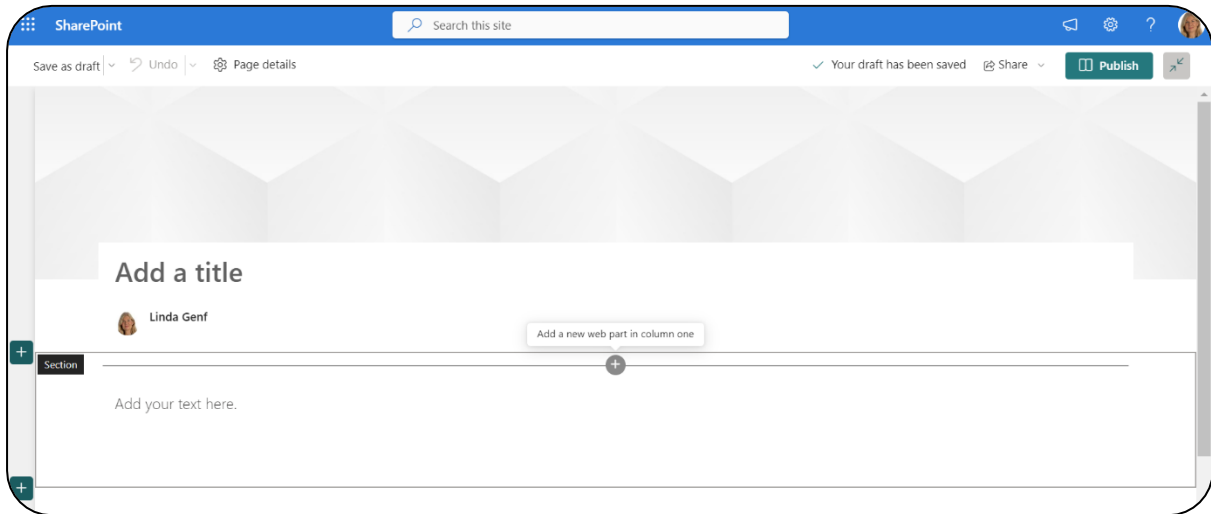All rights reserved.

In SharePoint:

1. Log into Microsoft 365 and navigate to a **SharePoint site**.
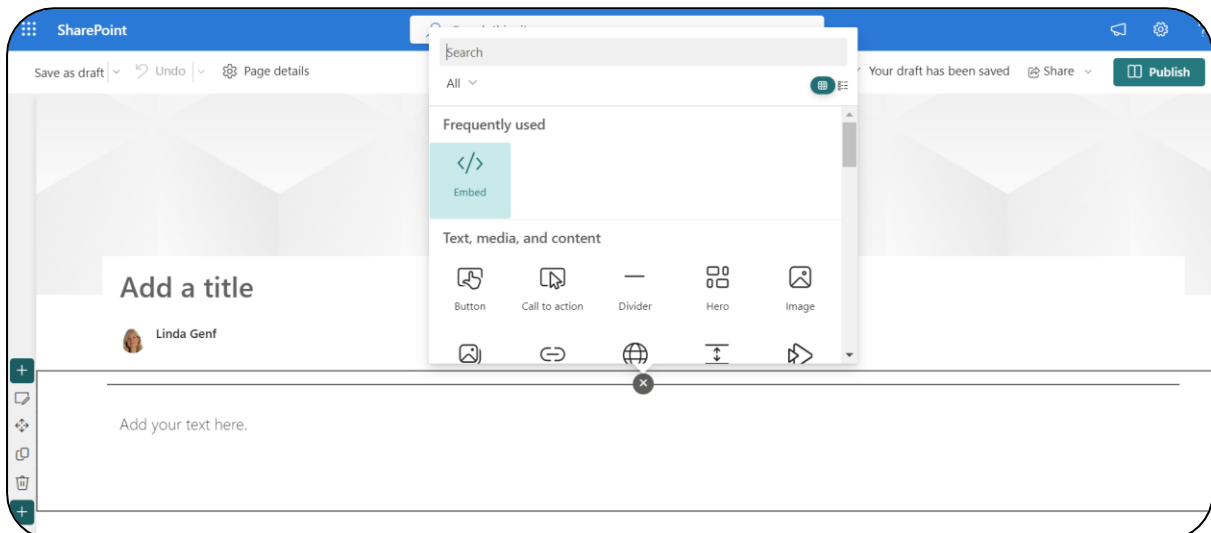
2. Click on **+ New** and select **Page**.

3. Select the **Blank** page template and click the **Create page** button.

4. Mouse-over the page's text space to display the plus button and click on **Add a new webpart**.
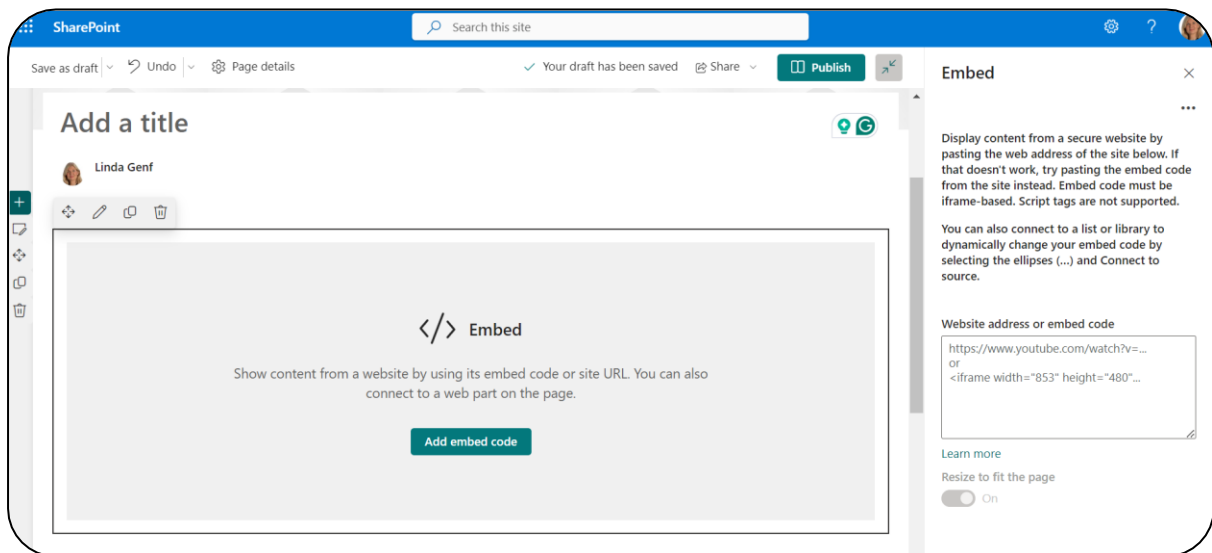

5. Type "Embed" in the search bar and then press the **Embed** button.
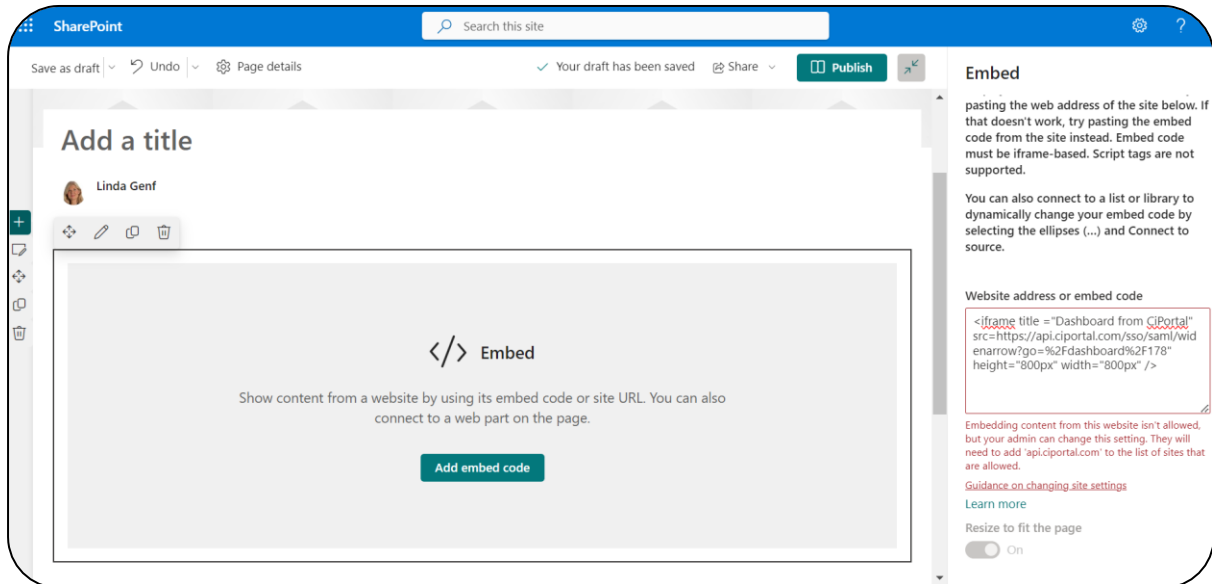

6. Paste the embed code from the "Example of an <iframe /> for embedding this dashboard" text bar in the Wide Narrow portal, into the "Website address or embed code" text box on the **Embed** sidebar.

   If you want to increase the size of the embedded dashboard, change the height and width values in the copied embed code to 100%.

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7. If you encounter the message in red below, that embedding is not allowed, please check with your SharePoint Site Administrator to ensure embedding is enabled.

Embedding content from this website isn't allowed, but your admin can change this setting. They will need to add 'api.ciportal.com' to the list of sites that are allowed.
Guidance on changing site settings

To add 'api.ciportal.com' to the list of sites that are allowed:
Click on Settings > Site information > View all site settings > HTML Field Security and add the Wide Narrow dashboard domain to the allowed domain list (api.ciportal.com for dashboards embedded using SSO and embed.ciportal.com for dashboards embedded with key authentication)

8. Click the **Publish** button. The embedded Dashboard is now displayed as a new selectable Dashboard in the SharePoint site menu, and visible on your SharePoint site to everyone who can access the site.

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