

# Creating a Suite

Let’s think big picture for a moment! Any given Onit client might use our platform to solve between one and many dozens of different business problems. From tracking legal spend, to budgeting, to accruals, to expense reports the range is far and wide. As a result, an Onit environment might contain lots of different Apps and Records.

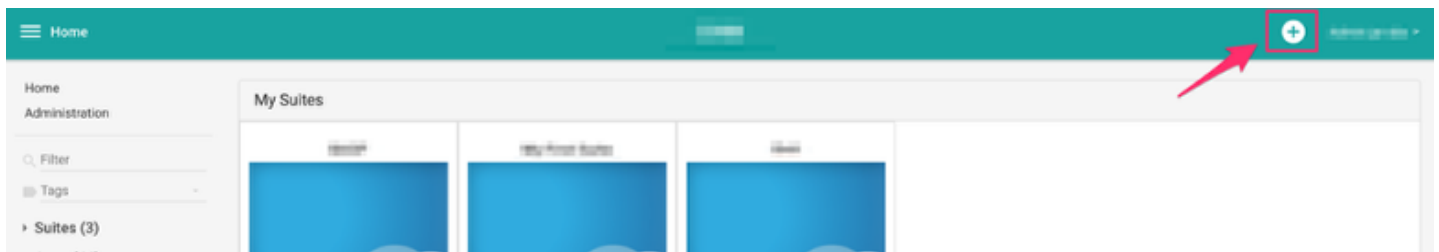
This is great news for the client as a whole, as it means that Onit is orchestrating their business and providing tons of value. For individual end-users, however, lots of Apps and data can be overwhelming to navigate. Ideally, each end-user will be presented with a UI that only shows them the Apps and Records that they actually care about, as well as charts and tables that spot trends and highlight their action items and key metrics. And that’s where Suites come in!

Suites act as a user’s Onit homepage, the first page that a user sees when they log in. On this homepage each end-user sees a curated collection of “widgets” that list and link to Records that a specific user cares about - for example, invoices pending the user’s approval or legal matters upon which the user is a Participant. In addition, Suites provide a slide-out sidebar menu that gives the user access to a curated list of Apps, links, and reports that the user in question uses. As an App Builder Developer, you can create multiple Suites, one for each type of user (e.g., one Suite for attorneys and another for paralegals) and/or you can create different Suites for different business problems (e.g., one Suite for budgeting and another for accruals).

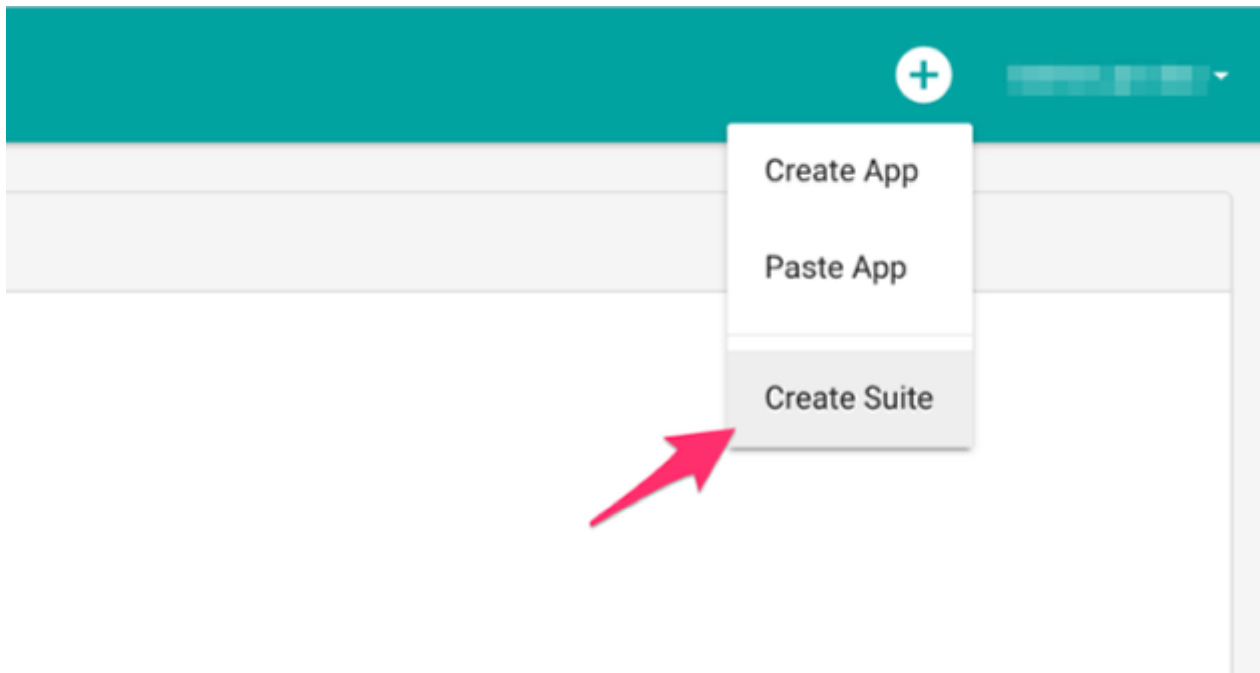
In this tutorial we’ll explain how to build and configure Suites.

## Creating a Suite

1. Navigate to the `/apps` page of your environment and click the “plus” icon in the upper-right corner of the page.



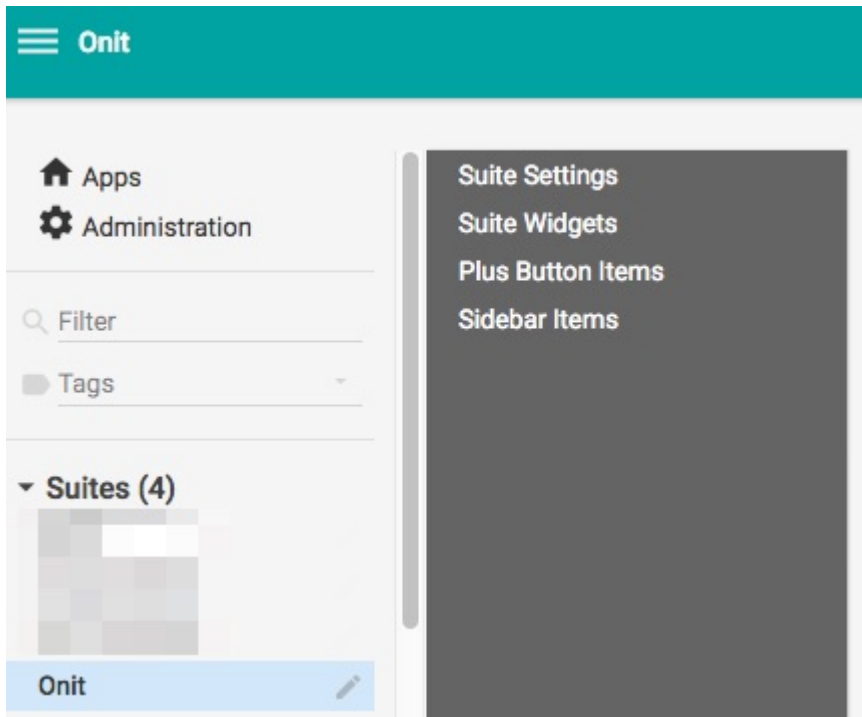
2. From the dropdown select **Create Suite**.




3. Provide your Suite with a name and display name, and click **Create**.

A screenshot of a 'Create App Suite' form. The form has two input fields: 'Name' with the value 'finance\_suite' and 'Display Name' with the value 'Finance Suite'. A blue 'Create' button is located at the bottom right of the form. The form is titled 'Create App Suite' and has a close button (X) in the top right corner.

4. You'll be redirected to the Suite's Advanced Designer page. You'll use the many configuration options on this page to build your Suite.

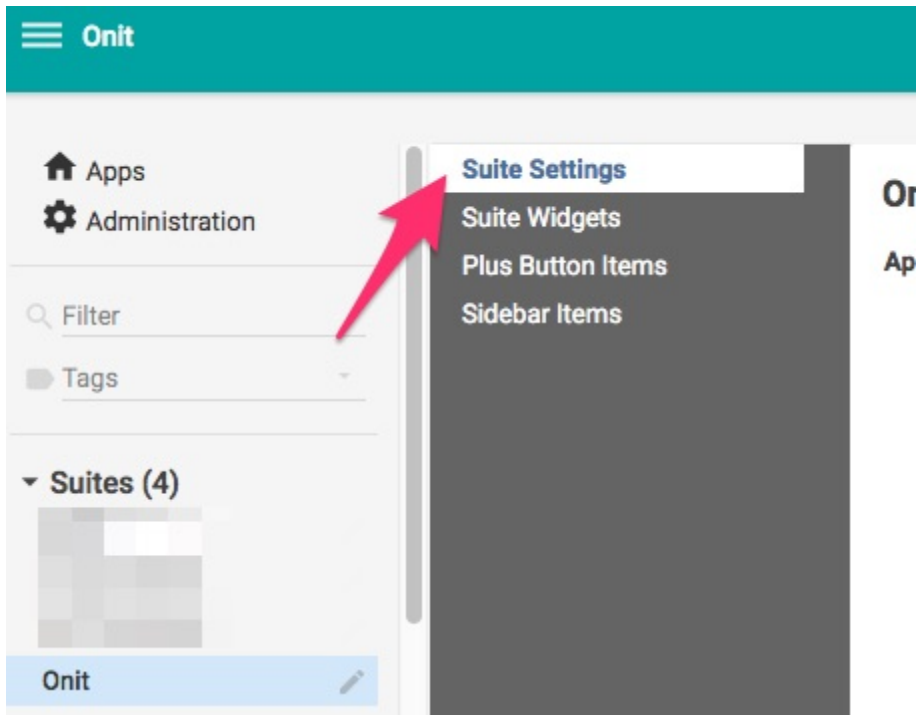


 This tutorial is all about creating and configuring Suites. Once a Suite is built, assigning it to users and groups is a whole different configuration process, which is covered in [this separate tutorial](#).

## Initial Suite Set Up

A Suite can only interact with Apps that have been explicitly added to it. By default, a new Suite has no Apps. Follow the steps below to add Apps to your Suite.

1. Click the **Suite Settings** node in the Advanced Designer page.



2. Use the **Apps** property to assign **Apps** to the Suite.



**Warning:** If you forget to add an App to this section, you will not have access to that App in Suite Widgets, Plus Button Items, or Sidebar Items.

**Suite Settings**

Suite Widgets  
Plus Button Items  
Sidebar Items

**Onit**  
Apps

Billing Authorization Requests × Invoices × Tasks × Status × Vendor Assignment to Matters × Contact ×  
Contact Involvement to Matter × Non Invoice Payments × Reports × Matter × Vendors × Timekeepers × Vendor Budget Process ×  
Budget × Documents × Department Accrual Process × Monthly Accrual Process × Monthly Accrual Request × Annual Rate Negotiation ×  
Vendor Negotiations × Timekeeper Rate Request ×

Name \* Onit  
Display Name \* Demo  
Title Image suite\_default.png  
Enabled ☒

Navigation Menu

Disable Icons ☐  
Hide Apps Link for App Creators ☐  
Hide Administration Link for System Admins ☐

Delete Save

3. By default, brand new Suites are not enabled - as a result they appear under the **Inactive Suites** header on the **/apps** page. You must enable your new Suite to use it.

Suite Settings

Suite Widgets

Plus Button Items

Sidebar Items

Onit

Apps

Billing Authorization Requests

Invoices

Tasks

Status

Vendor Assignment to Matters

Contact

Contact Involvement to Matter

Non Invoice Payments

Reports

Matter

Vendors

Timekeepers

Vendor Budget Process

Budget

Documents

Department Accrual Process

Monthly Accrual Process

Monthly Accrual Request

Annual Rate Negotiation

Vendor Negotiations

Timekeeper Rate Request

Name \*

Onit

Display Name \*

Demo

Title Image

suite\_default.png

Enabled

☒

Navigation Menu

Disable Icons

☐

Hide Apps Link for App Creators

☐

Hide Administration Link for System Admins

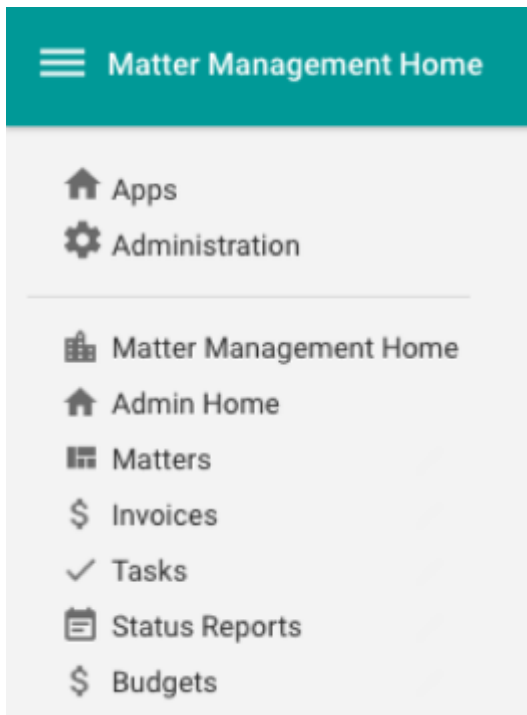
☐

Delete

Save

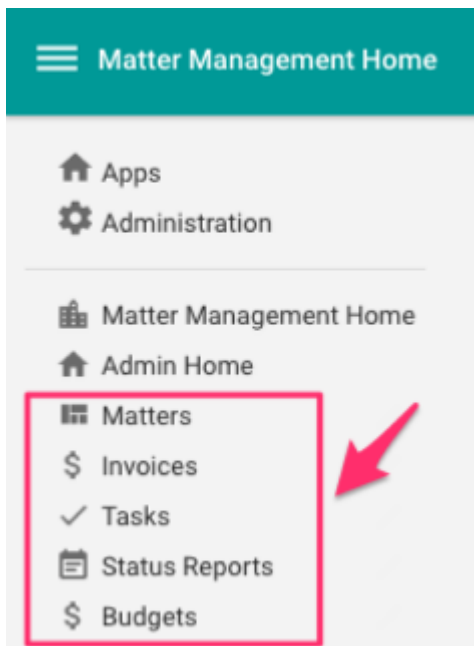
## Creating Sidebar Items

As mentioned earlier, a Suite contains a slide-out navigation list that end-users can leverage to move around their Onit environment (see the example screenshot below). Each item in the sidebar list is a clickable link.



There are four types of items that you can add to slide-out sidebar list:

- App Link:** A link to an App's grid-based Dashboard. The sidebar items called out in the screenshot below are App Links.



- **Dashboard:** A link to Suite Dashboard.

💡 Wait, what?! An App has a “Dashboard” and a Suite has a “Dashboard?” Technically, yes though these are two entirely different things that happen to share the same name. To hopefully clear up some of this confusion, below are two screenshots. The first screenshot shows an App’s grid-based Dashboard the second screenshot shows a Suite’s Dashboard.

Apps

Administration

Matter Management Home

Admin Home

Matters

Invoices

Tasks

Status Reports

Budgets

Financial Dashboard

Apps Home

Spend Reports

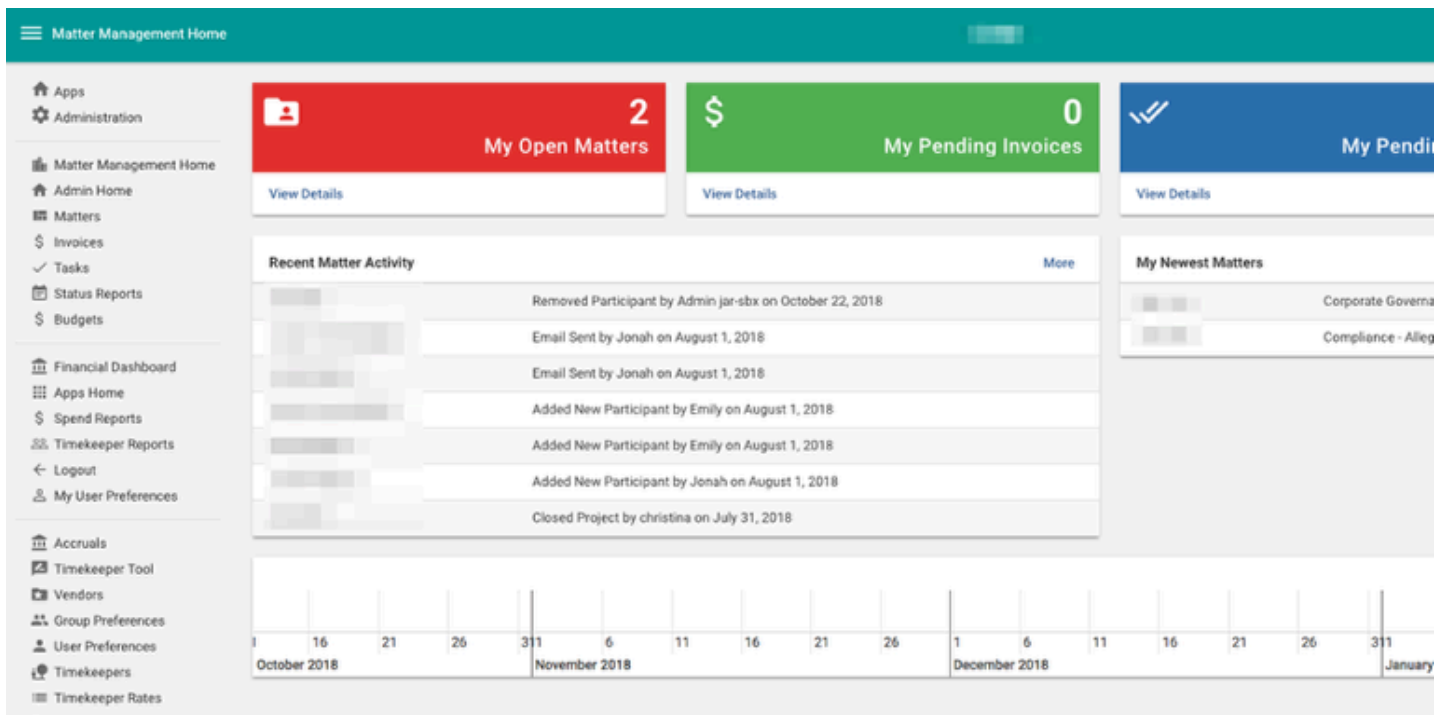
Timekeeper Reports

Logout

My User Preferences

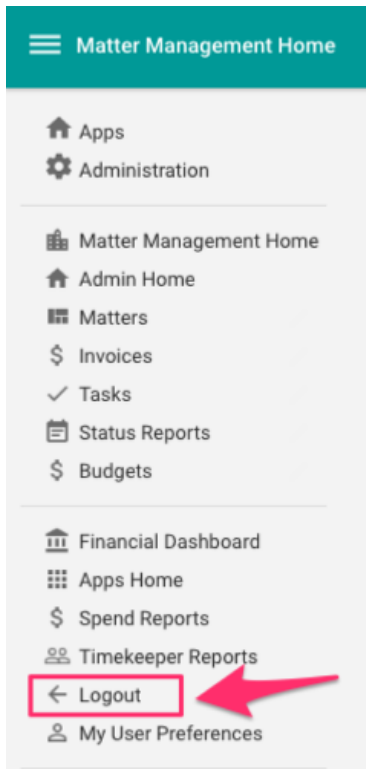
My Recent Activity ▾ All Transactions ▾ | [Save View](#)

Matter Name	Matter Number	Matter Manage...	Matter Type	Brief Matter Descripti...	Start	Last Acti...
	2018-57389		Alleged Non-Compliance		Jun 23, 2018 06:44 PM	Oct 22, 2018 02:27 PM
	2018-57420		Corporate Maintenance		Jul 31, 2018 10:01 AM	Jul 31, 2018 10:01 AM
	2018-57427		Commercial Contracts		Jul 31, 2018 10:16 AM	Jul 31, 2018 10:16 AM
	2018-57429		Alleged Non-Compliance		Jul 31, 2018 10:24 AM	Jul 31, 2018 10:24 AM
	2018-57430		Alleged Non-Compliance		Jul 31, 2018 10:24 AM	Jul 31, 2018 10:50 AM

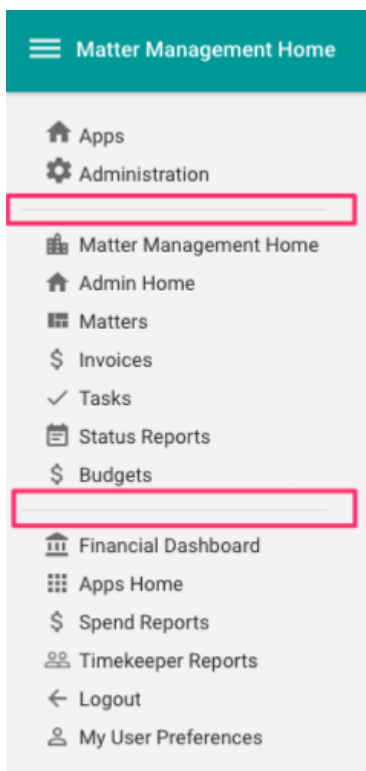


**i** As seen in the screenshot directly above, a Suite's Dashboard is the *thing* that actually contains Widgets (e.g., tables, charts, graphs). As a result, when most people think of a "Suite" they are actually thinking of a "Suite Dashboard." A "Suite" may contain between one and many different "Suite Dashboards."

- **Link:** A link to a specified URL. In most cases, this is used to provide a link in Onit to a non-Onit website. For example, maybe a customer wants to provide Onit users with a quick link to their documentation management system. On the other hand, this is often used to provide a link to the Onit URL that forces a log out, which gives users a handy way to end their Onit session (see the example screenshot below).



- **Separator:** When building a slide-out sidebar list, you can group navigation items together (e.g., all of the budget-related apps might be listed first, followed by a group of accrual-related apps). When you take this approach you can optionally insert separators between each group (as seen in the screenshot below). In order to do so you must first create separators in the Suite's Advanced Designer page.





! If your slide-out navigation list needs, for example, three separators, you must individually create three discrete separators.

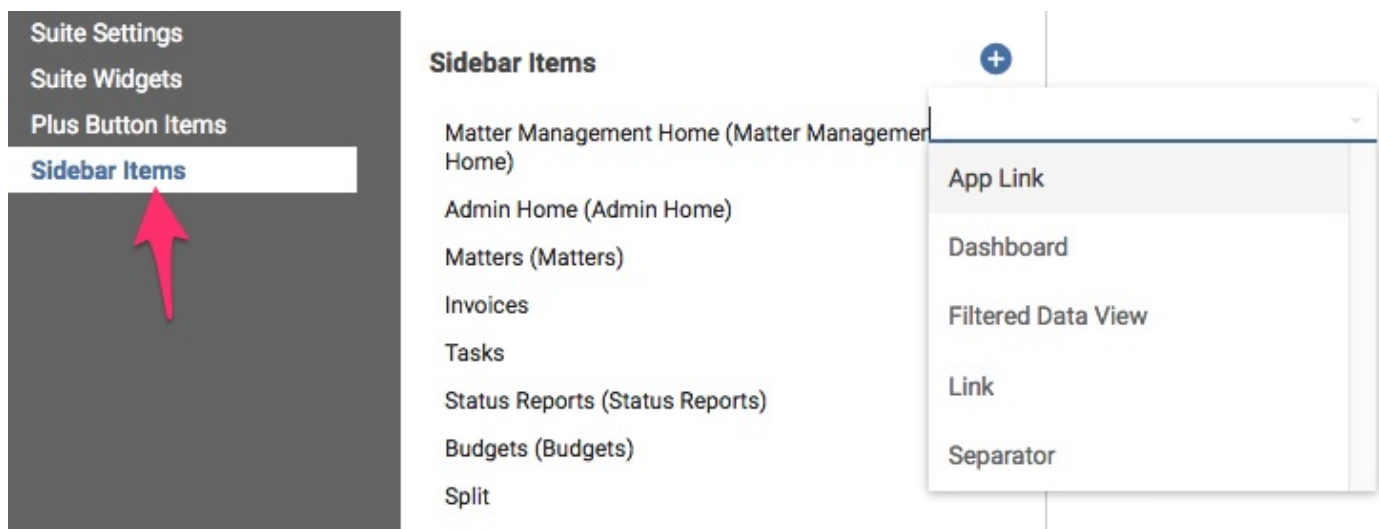
In the steps below, we'll walk through the process of creating a few example sidebar items, just to get a feel for how this works.

i It's worth noting at this point that you won't use a Suite's Advanced Designer page to configure which individual items any given user/groups can see (or not see) in a slide-out sidebar list. This is configured elsewhere and explain in a [separate tutorial](#).

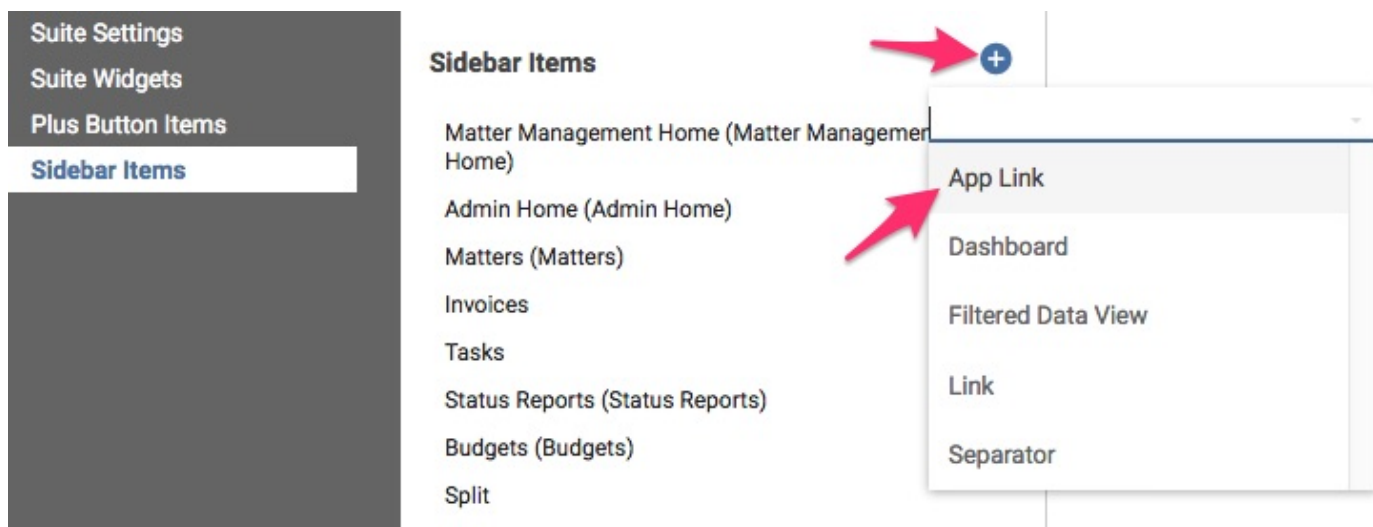
## Creating an App Link (Sidebar Item)

To create an App Link:

1. Click **Sidebar Items**.



2. Click the **plus** button then choose **App Link**.




3. The first navigation item link that we want available to users will be the **Invoices** App. Enter the following properties.
- **Name:** The item's backend name (which will not appear to end-users).
  - **Display Name:** The item's display name. (The **Name** and **Display Name** can be the same)
  - **App:** The App that this link will point to. Remember that you can only create navigation links to Apps that have been assigned to your Suite.
  - **Icon:** The icon that will appear next to the navigation link in the navigation list.

#### App Link

Name *	Invoices
Display Name	Invoices
App *	Invoices
Icon	\$ MDI - Attach money grey600 48dp

Delete Save

 For a visual list of (most) available icons see [this website](#).

## Creating a Dashboard (Sidebar Item)

To create a Suite dashboard:

1. Navigate to the **Sidebar Items** node in your Suite's Advanced Designer page, click **plus**, and choose **Dashboard**.

+

Dashboard

er

App Link

Dashboard

Filtered Data View

Link

Separator

New Dashboard

Please give a Display Name (that the end user will see) for this Dashboard

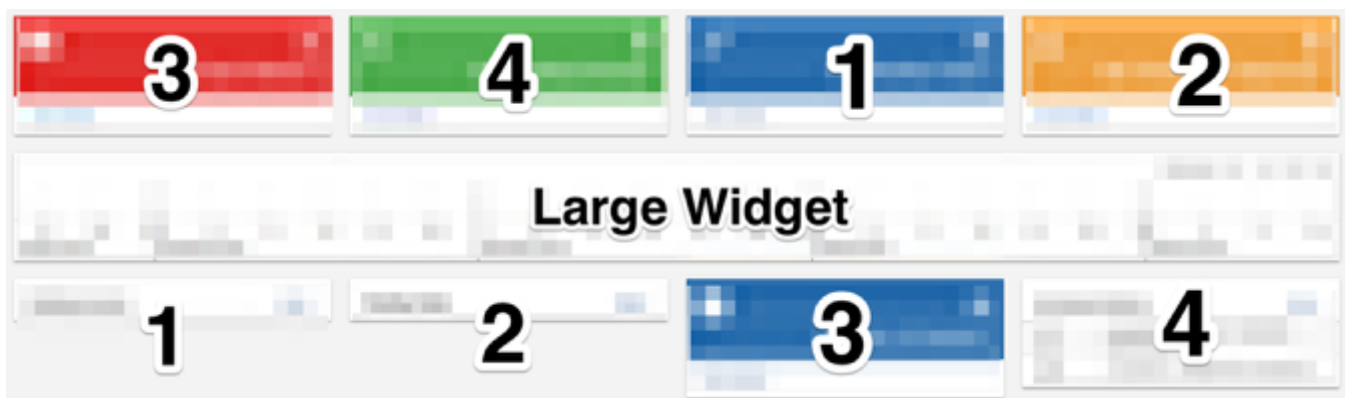
Please select the Suite Widgets that you would like to display in this Dashboard

Please select an image to display next to this Dashboard in the sidebar

Save


2. Name your dashboard and choose the widgets that you would like to display on the dashboard in the **Widgets** property.

- **Name:** The dashboard name.
- **Display Name:** The name of the dashboard that users will see.
- **Widgets:** Widgets to be included in the dashboard. Widgets are ordered in a 3,4,1,2 order on the page. The widgets *directly* under a large sized widget will have the correct 1,2,3,4 order. We are actively working on resolving the widget ordering defect.
- **Icon:** The icon that will appear next to the navigation link in the navigation list.



**i** Obviously, the widgets must already exist in order to add them to a Dashboard. We'll explain how to create widgets later in the tutorial.

## Dashboard

Name *	Matter Management Home
Display Name	Matter Management Home
Suite Widgets	<div>My Pending Tasks × My Timekeeper Approvals × My Open Matters × My Pending Invoices ×</div> <div>Key Dates × My Newest Matters × Recent Matter Activity ×</div>
Icon	 MDI - Location city grey600 48dp

Delete Save

- Click **Save** to save your changes.

## Creating a Link (Sidebar Item)

To create a link:

- Navigate to the **Sidebar Items** node in your Suite's Advanced Designer page, click **plus**, and choose **Link**.

+ Link

App Link  
Dashboard  
Filtered Data View  
Link  
Separator

New Link

Please give a Display Name (that the end user will see) for this Link

Please enter the link you would like to direct the user to

Please select an image to display next to this Link in the sidebar

Save

- We'll create a link that point's to the Onit environment's log out page. Point the **Link** property to your environment's `/users/sign_out` endpoint.
  - Name:** Link name.
  - Display Name:** Link name the end-users will see.
  - Link:** URL for the navigation item to point to.
  - Icon:** The icon that will appear next to the navigation link in the navigation list.

Link

Name \*

Logout

Display Name

Logout

Link \*

/users/sign\_out

Icon

←

MDI - Arrow back grey600 48dp

Delete

Save

3. Click **Save** to save your changes.

## Creating a Separator (Sidebar Item)

To create a separator:

1. Navigate to the **Sidebar Items** node in your Suite’s Advanced Designer page, click **plus**, and choose **Separator**.

+

Separator

App Link

Dashboard

Filtered Data View

Link

Separator

New Separator

If you want to use a Section Header instead of a bar, please enter the Section Header here

Save

2. Populate the following properties:
- **Name:** Name of the separator. Each separator must have a unique name.
  - **Section Header:** Header that will be displayed under the separator (this is optional).

Separator

Name \*

Split1

Section Header

If you want to use a Section Header instead of a bar, please enter the Section Header here

Delete

Save

3. Once you are done click **Save**.

**i** The top-down order of navigation items in a user's navigation list is determined by the left-to-right order of the JSON assigned to the user ([explained in more detail here](#)). However, if this JSON is missing or malformed, then the top-down ordering set on the Suite's Advanced Designed page will be used instead.

## Creating a Widget

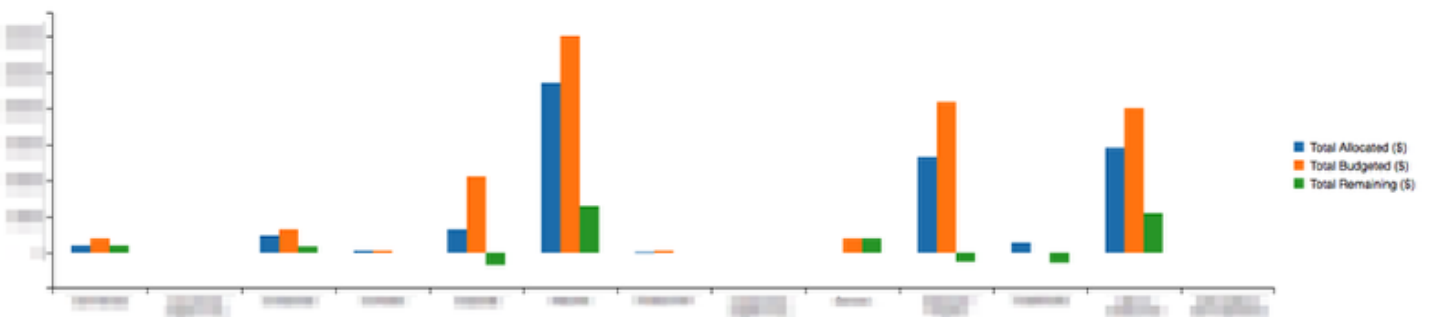
Widget's allow the App builder to customize the look and feel of a dashboard. They also provide users with helpful data comparisons and views that they would otherwise not have. A widget can only be displayed on a Suite dashboard.

The following widgets are available:

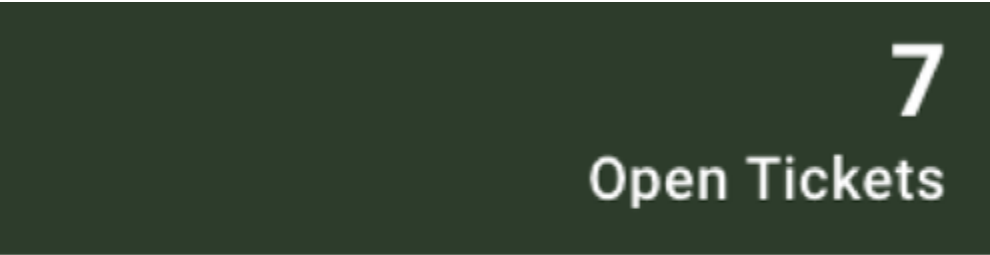
**!** **Caution:** Integer Fields with the '**Disable total on dashboard**' checkbox checked cannot be assigned to a widget. The widget does not render. The legend itself will render (assuming that there is one for that widget), but the data will be absent. Unchecking this checkbox on a Field resolves this issue. The preferred workaround is to create two separate Fields - one for the dashboard and one for the Suite.

## Series Chart

Annual Budget by Area of Law



Counter

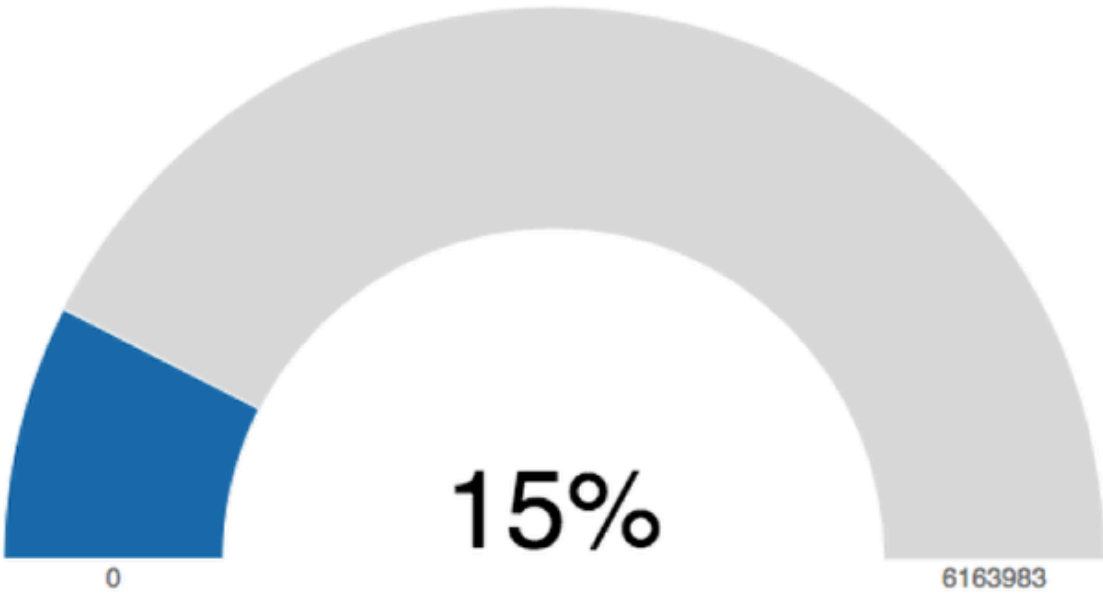


[View Details](#)

---

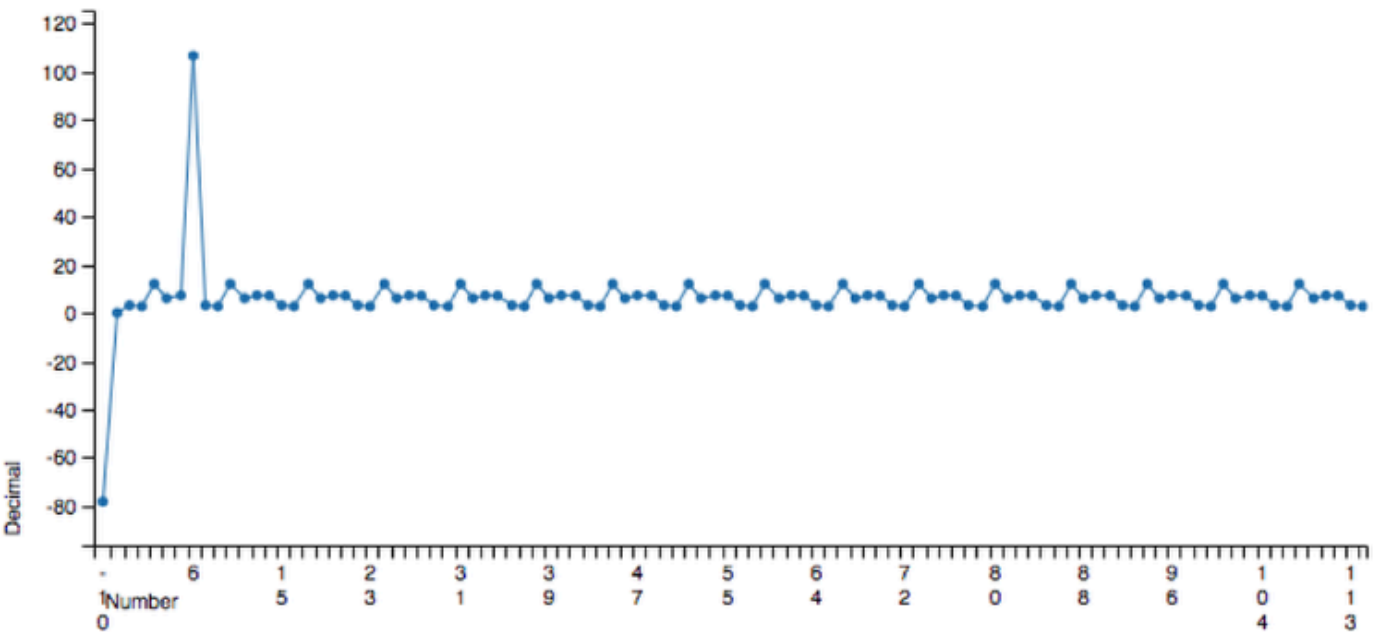
Gauge

Budget to Actual

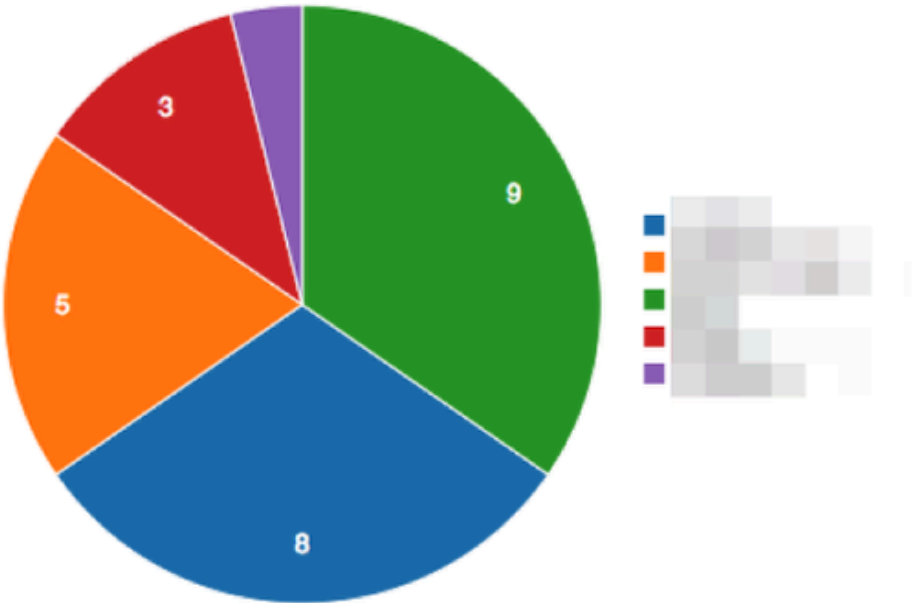


# Line Chart

Sample Line Chart



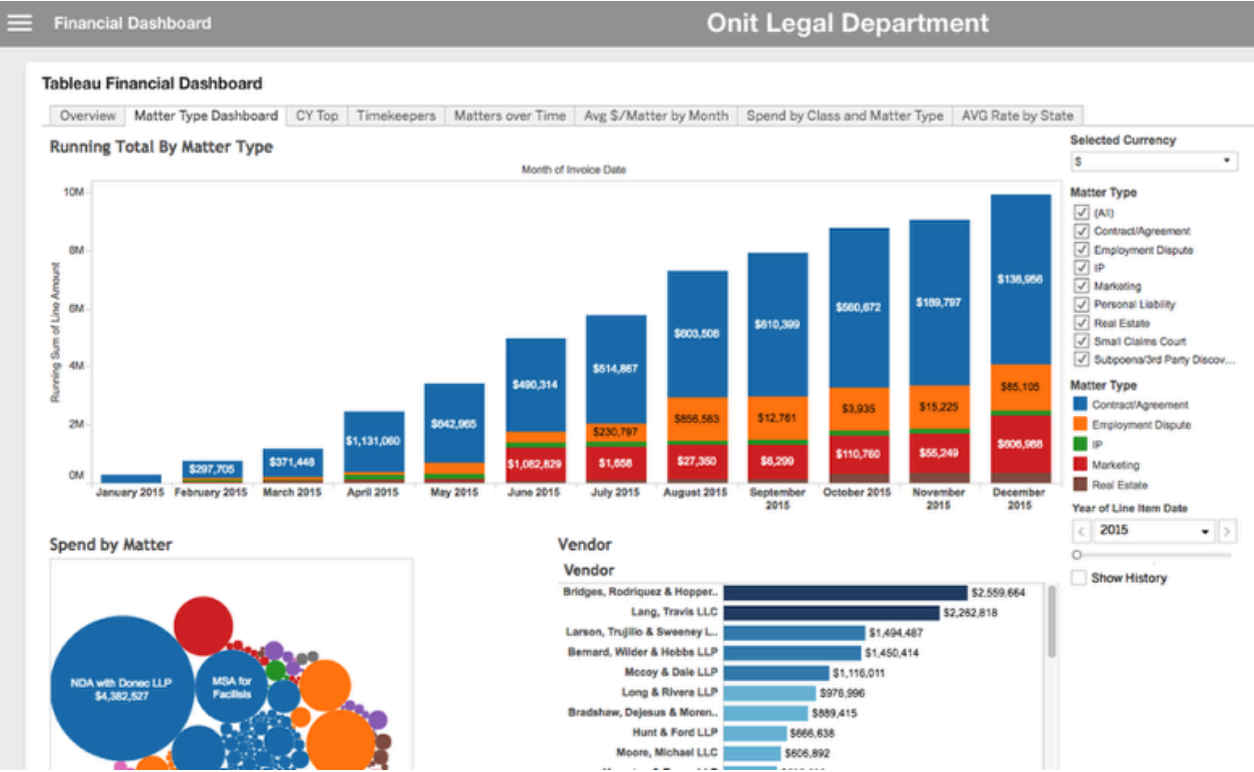
# Pie Chart



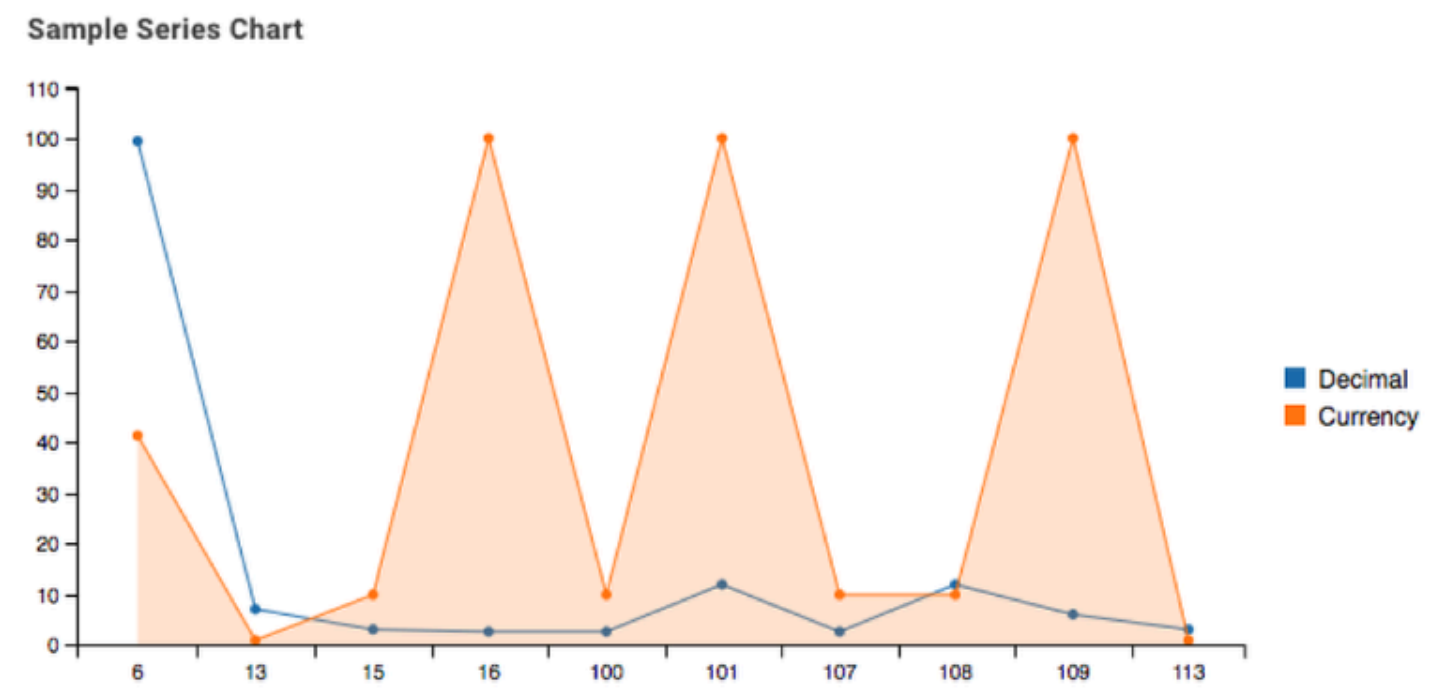


Portal

Report



# Series Chart

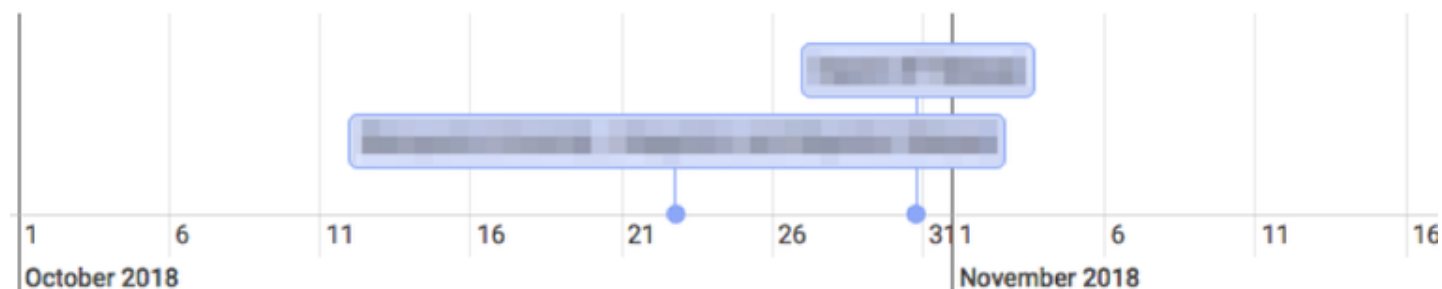


# Table

Table with 2 columns: [Redacted], [Redacted] [More](#)

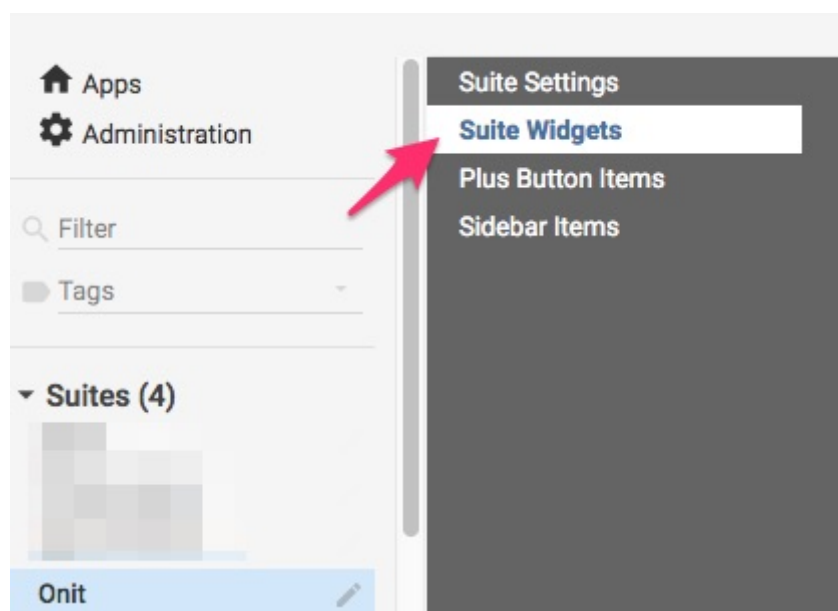
[Redacted]	161
[Redacted]	156
[Redacted]	87
[Redacted]	71
[Redacted]	6

# Timeline




The specific configuration for each widget will be different. In this tutorial we will explain how to configure a Counter widget only, as an example.

1. Navigate to the **Suite Widgets** node in the Suite's Advanced Designer page.



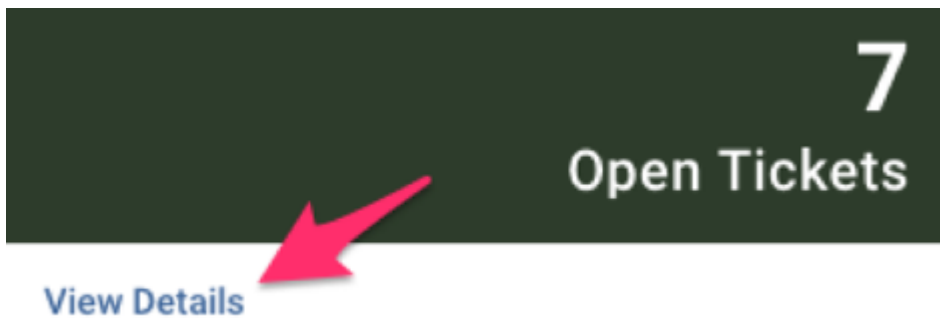
2. Click the **plus** button then choose **Counter**.
  - **Display Name:** Display name of the widget.
  - **App:** App that the counter widget will pull data from.
  - **Filter:** Filter applied to data aggregated by the widget. For more information on how to create raw filters see [this tutorial](#). For more information on the **user\_pending\_work** filter see [this tutorial](#). This filter would ensure that a user only sees the count of Records requiring their attention on their widget, not the system total number of pending Records.

 The filter can be configured to show only Records relevant to the current user. The following Liquid filter will return only Records where the current user has pending work and the Record's state is not

“Rejected”, “Approved”, “Closed”, or “Complete”. Then the filter will sort all valid Records by the created date in descending order.

```
[{"type": "user_pending_work", "user_id": "{{current_user._id}}"}, {"operator": "like", "value": "#!"  
"sorting", "sort": "created_at", "dir": "desc"}]
```

- **Data View:** An optional filter applied to data aggregated by the widget. If assigned, the data view will control which Records show up in the widget and how they appear to the user (e.g., column **visibility** and order when the user clicks “View Details”).







**i** To create a data view go to your App’s advanced designer page. Under the **Components** node choose **Data Views**, then click the “plus” button to create a new view. For more information on how to create data views see [this tutorial](#).

**!** You must either assign a filter or data view to a widget, the configuration will work both ways.




- **Field:** Field in the specified App the widget will aggregate data from. The aggregation field property can be left blank if the widget is counting Records returned from a filter. However, if the aggregation field is something other than the number of Records (e.g., total spending) fill in the Field name here (e.g., **total\_spend**).
- **Value Type:** Count, Sum, or Average.
- **Decimal Places:** Number of digits to be shown after the decimal. Accepted settings are 0-6. The counter will round to the nearest unit and remove trailing zeros.
- **Text Color:** Optional. Color of the widget text, with the default being black.
- **Tile Color:** Optional. Color of the widget background, with the default being white.
- **Icon:** The icon that will appear next to the navigation link in the navigation list.
- **Widget Size:** Small, medium, or large. Widgets adhere to a 12-column layout: small widgets are 3 columns, medium are 6 columns, and large are 12 columns.

## Counter





### Widget Properties

Display Name *	My Pending Invoices	
App *	Invoices	
Filter *	Invoices - Current user's pending work sorted by Matter Name asc, invoice total desc	
Data View *	Invoices - Matter Invoices	

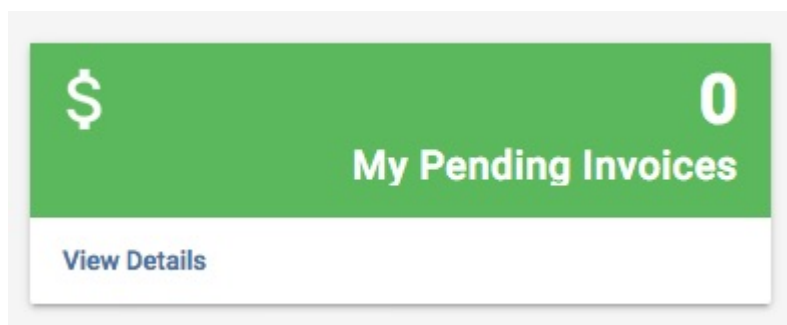
### Field Properties

Field	Please select a decimal, integer, or currency field	
Value Type *	Count	
Decimal Places	Select the precision for the aggregation	

### Display Properties

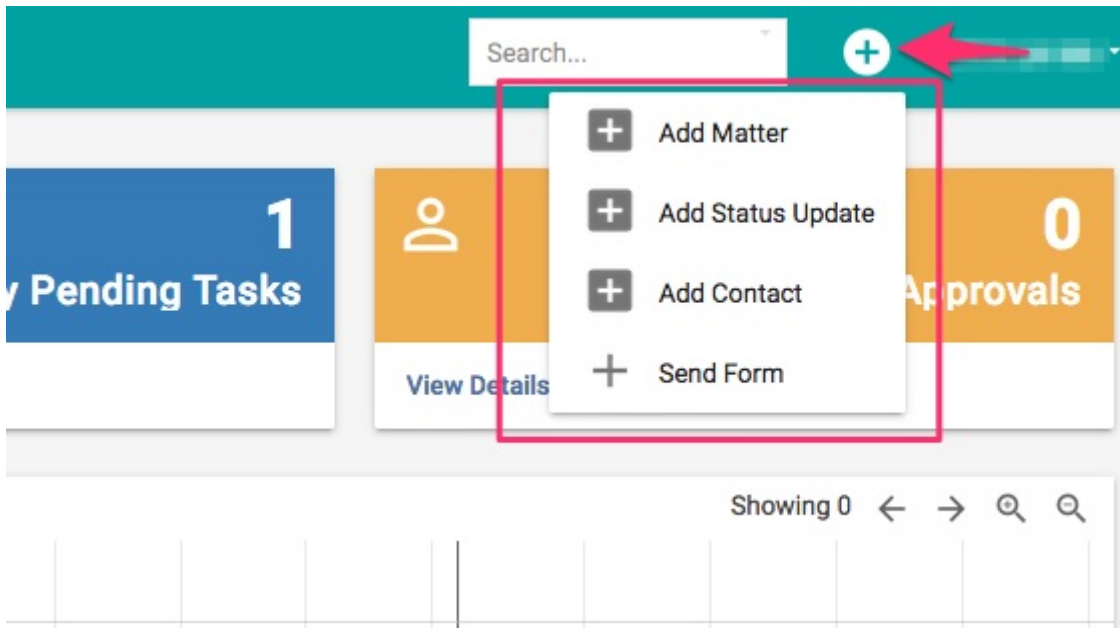
Text Color	#fff	
Tile Color	#5cb85c	
Icon	 MDI - Attach money white 48dp	
Widget Size *	Small	

[Delete](#) [Copy](#) [Save](#)

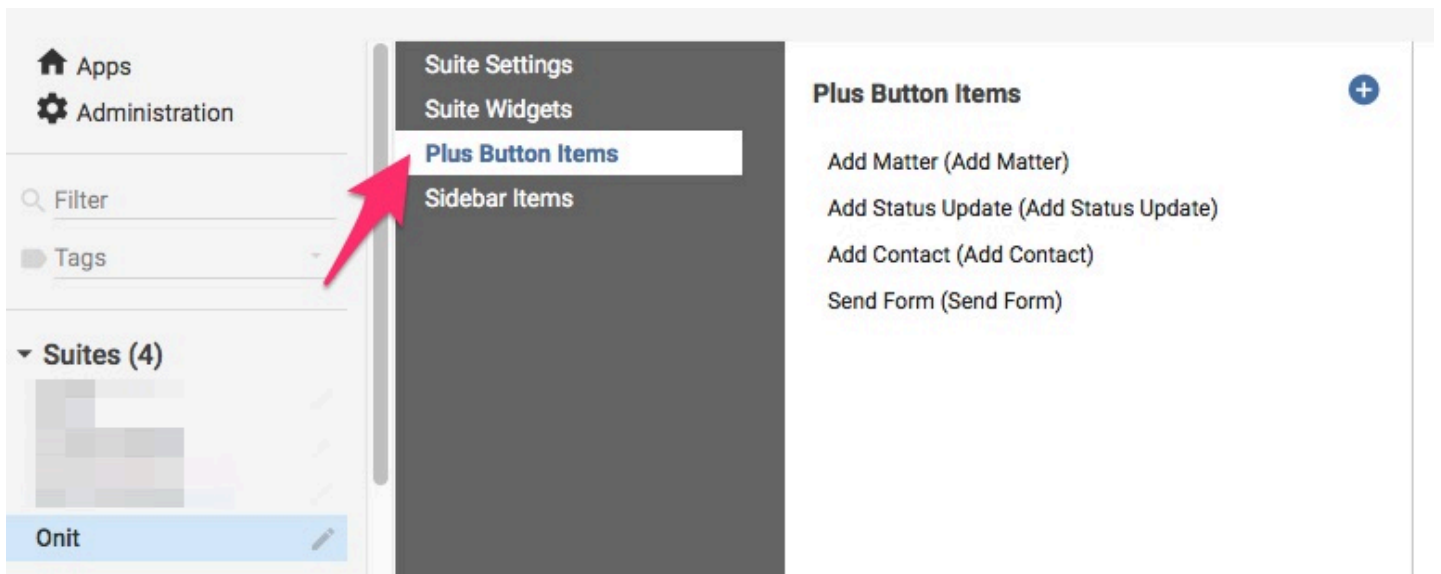


## Creating Plus Button Items

Plus button items refer to the dropdown list of actions a user can perform directly from the suite. For example in this suite users can create a new **Matter** Record, create a new **Status Update** Record, create a new **Contact** Record, or submit a form. Each one of these items launches a particular App.



To configure plus button items navigate to the **Plus Button Items** node in your Suite designer. Then click the **plus** button and choose **Launch App**.



Fill in the following properties:

- **Name:** The name of the plus button.
- **Display Name:** The name of the plus button that will appear to users.
- **App:** App that the plus button action will launch (E.g., the Add Matter button will launch **Matter**)
- **Icon:** Icon that will display beside the plus button.

## Launch App

Name *	Add Matter	
Display Name	Add Matter	
App *	Matter	
Icon	MDI - Add box grey600 48dp	

DeleteSave

Click **Save** to save your changes.

## Setting Colors

It's possible to force pie and arc chart slices to be a given color. For example, you could highlight invoices or contracts that are in a Disputed phase by making their pie slice colored red. Or you could make pie charts follow the colors used in a client's branding.

This is still a beta feature, so to use this you'll need to go to Administration, and under Corporation Details click the Beta Features node. Select "Color-coded Suite Visualizations".

System Assets

Assets

Images

Lists

System Management

Batch Processes

Languages

Numeric Sequences

Packaging


Portals

System Messaging

Query Statistics


Advanced Designer

Enable Outlook Plugin ☐

Documentation: [Configuring the Outlook Plugin](#) 

Hide business logic buttons in Advanced Designer ☐

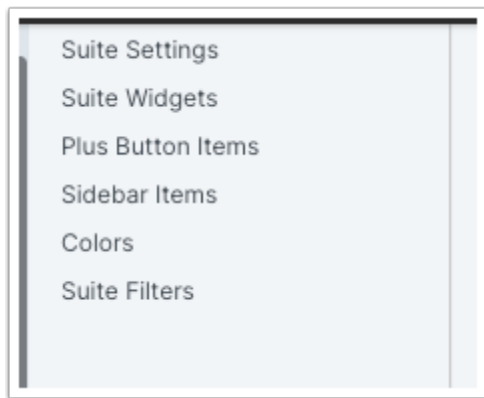
Pre-load Transaction Counts for App Panels ☐

Color-coded Suite visualizations ☒ 

Enable Translations ☒

Advanced Visualizations ☐

Now in the suite configuration page you will see a node for "Colors".



Click on "Colors" to see a list of already configured colors, with the usual + button icon to create a new one.

Colors

a string

+

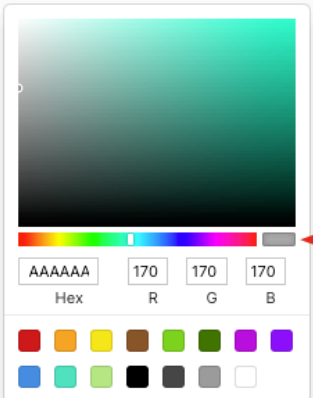
Label Color

Name \*

New Color

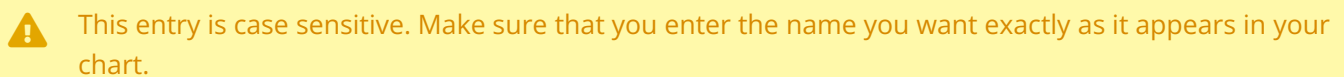
Color Value

#aaaaaa



Save

Under Name, put the chart label that will get this color. E.g., "Pending Invoice Approver 1" or "Disputed".



If you know your desired color's hex code, you can enter it directly into Color Value, or into the color picker window in the control labeled Hex.

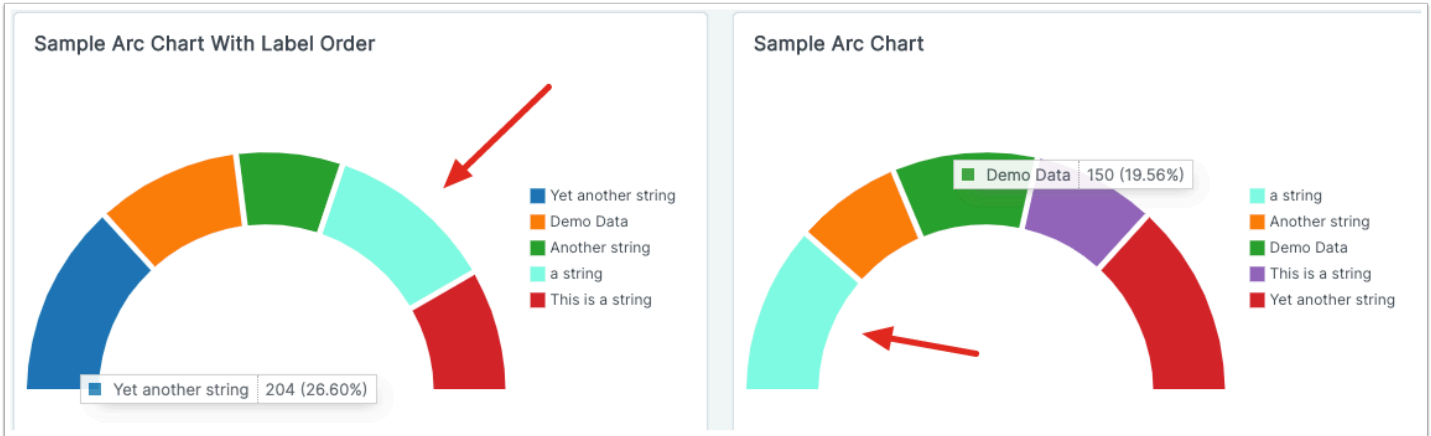
If you know your color's RGB values, you can input those.

There is a variety of preset colors to choose from down at the bottom.




You can make a custom color by setting hue with the slider, then dragging the pointer in the window to set saturation and brightness. The small pane indicated above with an arrow shows you a preview.

Click Save, and now pie and arc chart slices will always have this color.



## Suite Filters

Sometimes users want to apply extra filtering to suite dashboard widgets. With this configuration node, that becomes possible.

 This filtering will only apply to widgets that use Data Views. Widgets configured with Filters aren't supported.

Click on Suite Filters. You'll see a list of the apps that are included in your suite. Click on an app name to bring up a list of Fields in the app.

Suite Settings

Suite Widgets

Plus Button Items

Sidebar Items

Colors

Suite Filters

App Search Settings

Filter

default

Hailey Regression 1

Hailey Regression 2

Hailey Regression 3

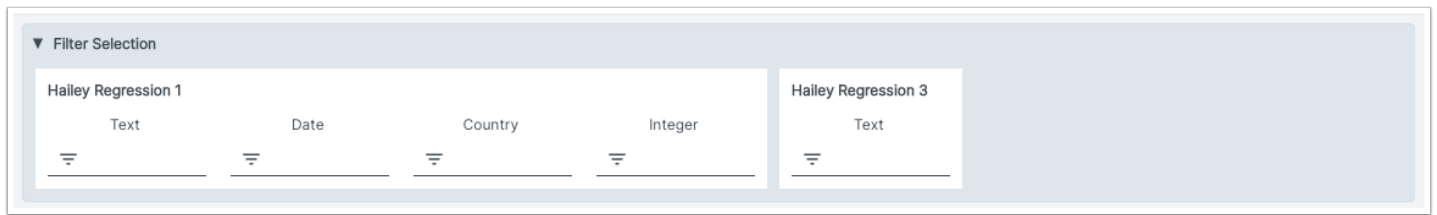
Hailey Regression 1

Name	Display Name	Filterable
requester_name	Name	<input type="checkbox"/>
name	Project Name	<input type="checkbox"/>
text_1	Text	<input checked="" type="checkbox"/>
textarea	TextArea	<input type="checkbox"/>
date	Date	<input checked="" type="checkbox"/>
datetime	Datetime	<input type="checkbox"/>
continent	Continent	<input type="checkbox"/>
country	Country	<input type="checkbox"/>
Est. multiselect	List Multiselect	<input type="checkbox"/>

Create \*

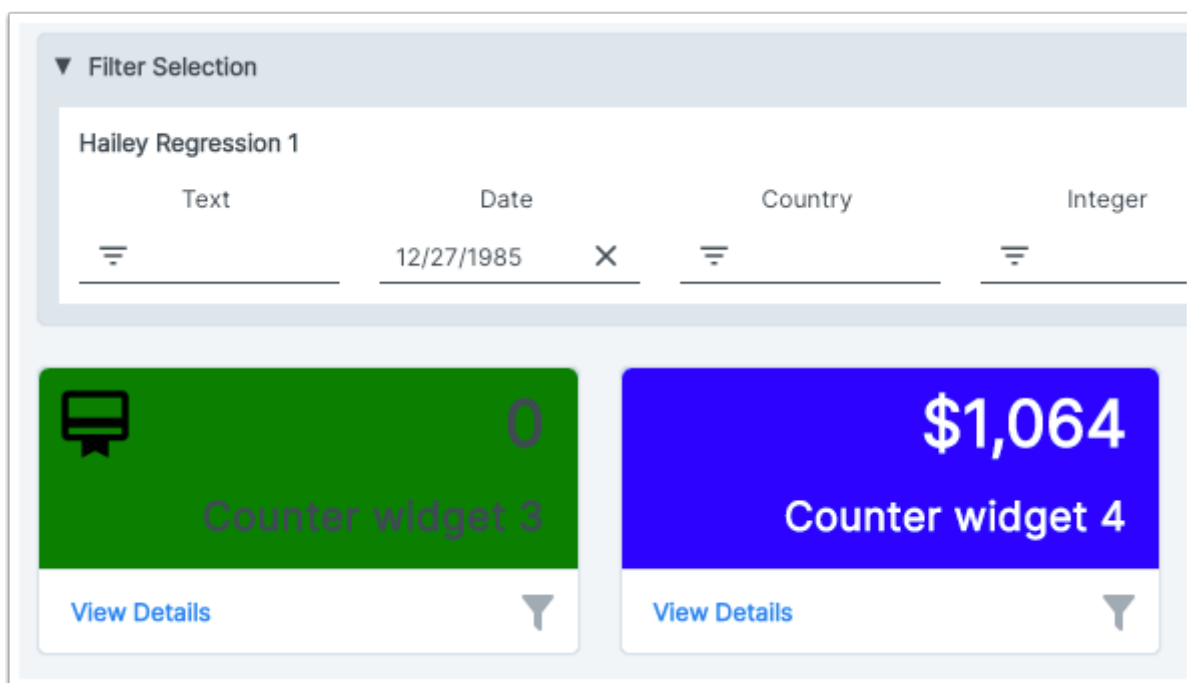
Select the Fields you want, then click Create. If you come back later to the same app configuration, the buttons here will be Save (to save any changes) and Delete (to clear all Field selections).

Once the suite filter has been created, users on a suite dashboard will see a header where they can set the filter.



Filtering uses the same controls as on an app dashboard grid column: e.g., text Field filters can be Exact or Contains and so on; number Fields will have Greater Than or Less Than; combo and listcombo fields will use the "simple" filtering.

Once a filter has been set, widgets affected by it will display a funnel-shaped icon.



If you click through to a widget grid, the grid will be filtered according to the dashboard-level setting. This filter will not be visible on the grid itself; and if the data view includes a filter, even if you clear that filter or click "Clear all filters", the grid will continue to honor the dashboard-level filter.