



DashBoard

User manual of KoareTech DashBoard

REFERENCE:	User Manual KoareTech DashBoard Ref. J17M2
VERSION:	1.0.0
AUTHOR:	KoareTech S.L.
DATE:	05/06/2022

Contents

- 1 Object of the document 3
 - 1.1. Structure..... 3
- 2 Configuration lists 4
 - 2.1 Structural field lists..... 4
- 3 Actions..... 6
 - 3.1 Home page 6
 - 3.2 Filter 6
- 4 Installation..... 8
 - 4.1. Tab Personal..... 8
 - 4.2. Channel Tab..... 8
- 5 Licence manager 9

1 Object of the document

Explain the detailed operation of the KoareTech DashBoard application for Microsoft Teams.

1.1. Structure

In the drafting of the document, a visual structure has been used to highlight those notes that include the most relevant content. The colour guide used is as follows:

 Note

 Critical note

 Design decision

 Pending decision

 Assumption

2 Configuration lists

To be able to manage those structural fields of the lists, configuration lists will be created, hidden only visible for the administrators.



Each element of these lists will correspond to an option for each of these structural fields.

2.1 Structural field lists

Next, we define each of the configuration lists for these structural data, these lists, as mentioned in the previous point, will only be visible to the administrators and these will be the ones who will be in charge of their management.

Name	KoareDashboardData		
Description			
Fields			
Title	Text	Mandatory	
Access Control	Boolean	Optional	If you want to include contact email
Access Control Admin	Text	Optional	Emails Only
Card Image	Image	Mandatory	
Url DashBoard	URL	Mandatory	Url to navigate
Description	Text	Optional	255 long
gpCategory	Lookup	Optional	List Categories
gpDeparment	Lookup	Optional	List Departments



Access Control Admin, you can only include an Email account

Name	KoareDACategories		
Description			
Fields			
Title	Text	Mandatory	
CoreTranslation	Multi text	Optional	Format JSON

Name	KoareDADeparments
Description	
Fields	

Title	Text	Mandatory	
CoreTranslation	Multi text	Optional	Format JSON

Name	KoareDashboardFavorites		
Description			
Campos			
Title	Text	Mandatory	
User Favorite	Text	Mandatory	
DAIDDashBoard	Number	Mandatory	

!

The CoreTranslation fields of the JSON type will be used if you want to have more than one language simultaneously, otherwise the value of the Title field will be used

Ex. {"es":"Portatil","en":"Laptop"}

Name	KoareConfigDashboard		
Description			
Campos			
Title	Text	Mandatory	
RCValue	Text	Mandatory	

!

There are 2 parameters of configuration

CardName → applications or workspace (you can select the style of the cards)

NItem → Number of cards to show per time

3 Actions

The users can do the following actions in the application.

3.1 Home page

All the cards with their descriptions and links to open them.

There are 3 buttons per cards:

- 1. Description button to show information about the card
- 2. Mail button, to send a message to the owner of the card
- 3. Favourite button, to save the card as favourite.

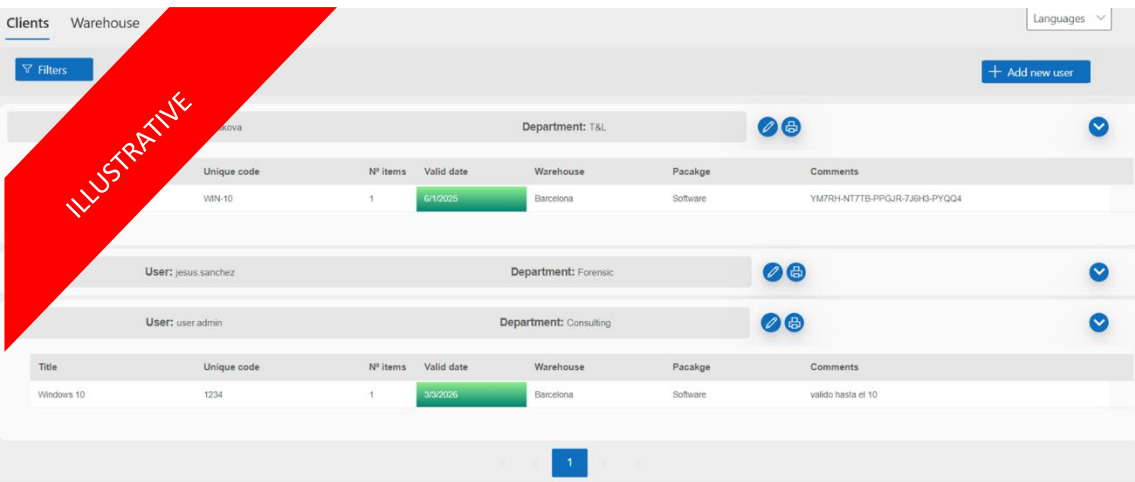


Figure 1. Home page


3.2 Filter


You can filter by card name, category or department.


 Search by name is not case-sensitive

Search users

User name





option 

 Search by users

Search items

Unique code



 Search by items


 Restore

Figure 4. Filters

4 Installation

4.1. Tab Personal

The first thing to select is a Teams where the users who are going to access the application are members.

Then you must press the **provisioning button**, which will generate the lists within the selected Teams group.

A

If the user does not have permissions on the associated Teams group, they will not be able to use the application.

!

You can only have the application associated with a single Teams group.

DD

Information will never be stored outside the tenant. All data will be integrated into the Teams group

4.2. Channel Tab

Multiple instances of the application can be generated for multiple groups and channels.

The first thing will be to press the **provisioning button**, which will generate the lists within the selected Teams group.

!

Within each group of teams, the same SharePoint lists will be used, sharing them.

DD

Information will never be stored outside the tenant. All data will be integrated into the Teams group

5 Licence manager

Licenses acquired through the Microsoft platform can be managed, either in user/use mode or without user limits.

In the case of user/use, they will have to be assigned to the users who are going to use the application, in the tab **Manage Licenses**.

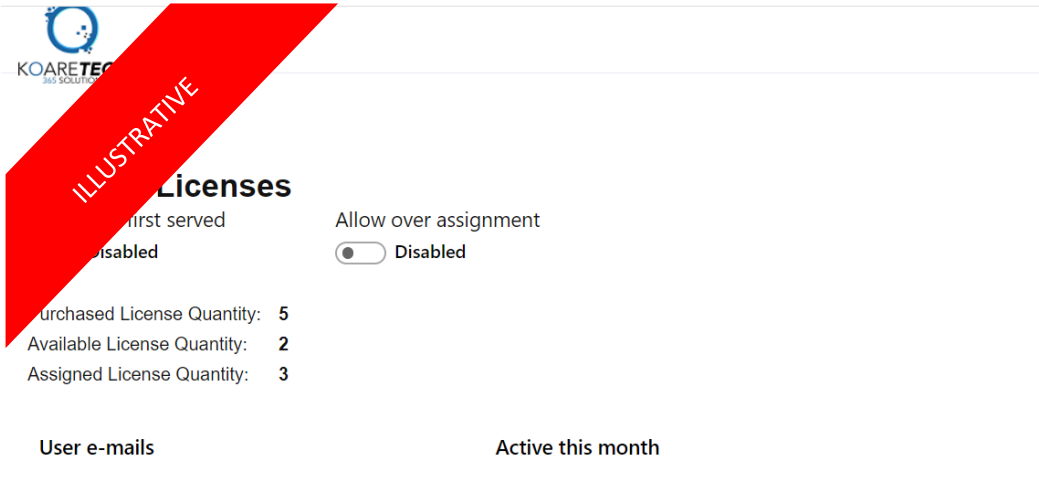


Figure 6. Manage Licences

Users who will have administration and license management permissions will be assigned through the tab **Manage Users**.

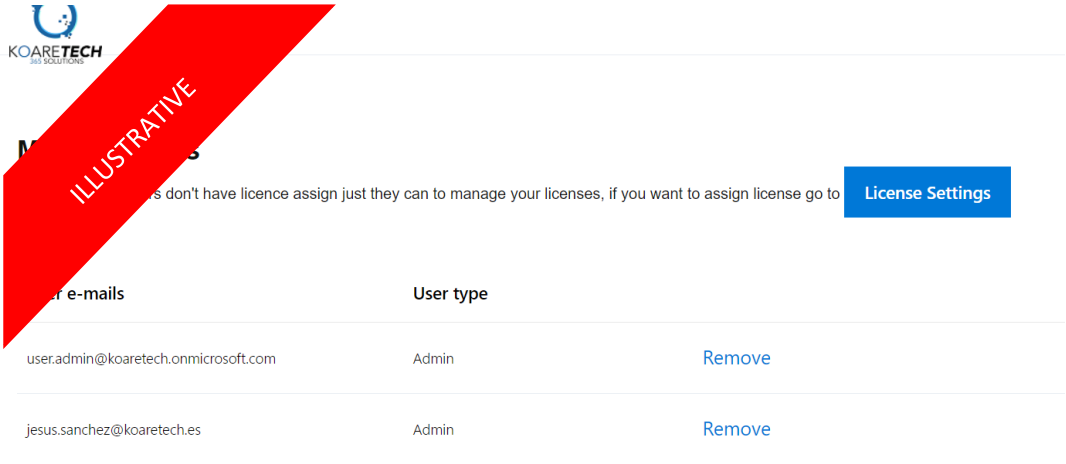


Figure 7. Manage Users

A These users do not have to have assigned licenses, they simply manage the licenses of the rest of the users.