



User Guide

Platform Manager

Index

Index.....	2
Introduction	3
1. Authentication	4
1.1. Login.....	4
1.2. Logout	4
2. Group User's Management	6
2.1. Create user's group	6
2.2. Filter users list by user's group.....	6
2.3. Edit user's group	7
2.4. Delete user's group.....	8
3. Users Management	10
3.1. Create user	10
3.2. Filter groups list by user.....	11
3.3. Generate QR code for user	11
3.4. Edit user	12
3.5. Delete user.....	13
4. Administrator Management	15
4.1. Create new administrator.....	15
4.2. Delete administrator.....	15
5. Assets Customization	17
6. My Account	20

Introduction

The Platform Manager is destined to provide management functionality regarding the Adyta.Phone clients' appliance. Specifically, its users, user groups, administrators, account licenses, and assets customization.

To access this management dashboard the client will need to have a valid registered administrator account, which is set up during the platform configuration and deployment. Further, administrator accounts can be added using the dedicated pane in the dashboard.

The possible actions on this dashboard are:

- Login and logout
- Create and delete users
- Create and delete user groups
- Add and remove users from groups
- Generate provisioning QR Codes for users
- Create and remove administrators
- Administrator can change own password
- Configure Adyta.Phone's specific customizable assets (currently supported: banners and logos)

Additionally, the dashboard is available in three languages: Portuguese (Portugal), English and Spanish.

1. Authentication

1.1. Login

Access the main page. A login form will be displayed.

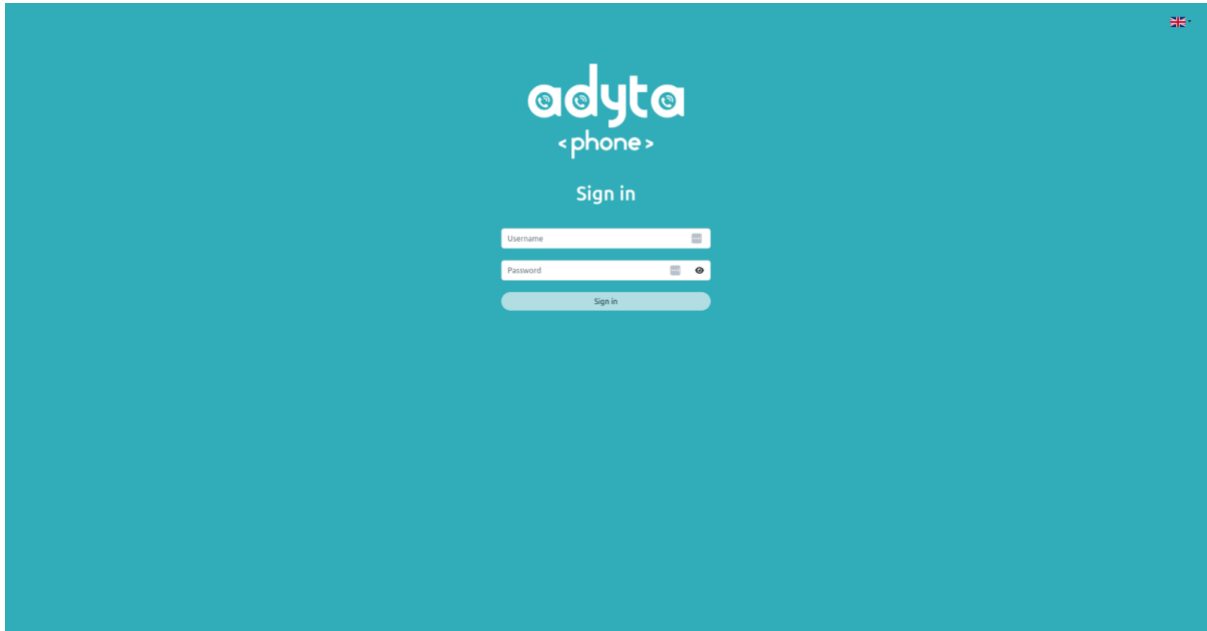
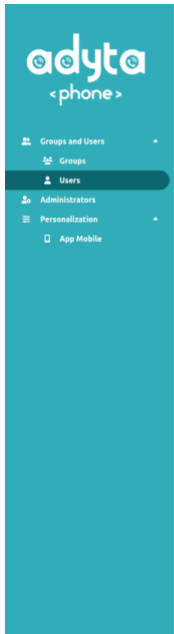


Figure 1 - Login page

Input your administrator account username and password and then press “Sign in” to access the dashboard.

1.2. Logout

On the top right of the upper navigation bar of the dashboard you will find the profile picture.



Add new user

Username First name Last name Groups

Users

Search

Username a	First name	Last name	Status	Actions
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>
>				<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="add"/>

Rows per page: 10 1-10 of 11



Figure 2 - Profile picture on the top right

Press the profile picture and then the “Logout” option and the session will be terminated.

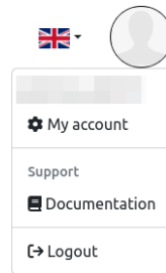


Figure 3 – Logout option

2. Group User's Management

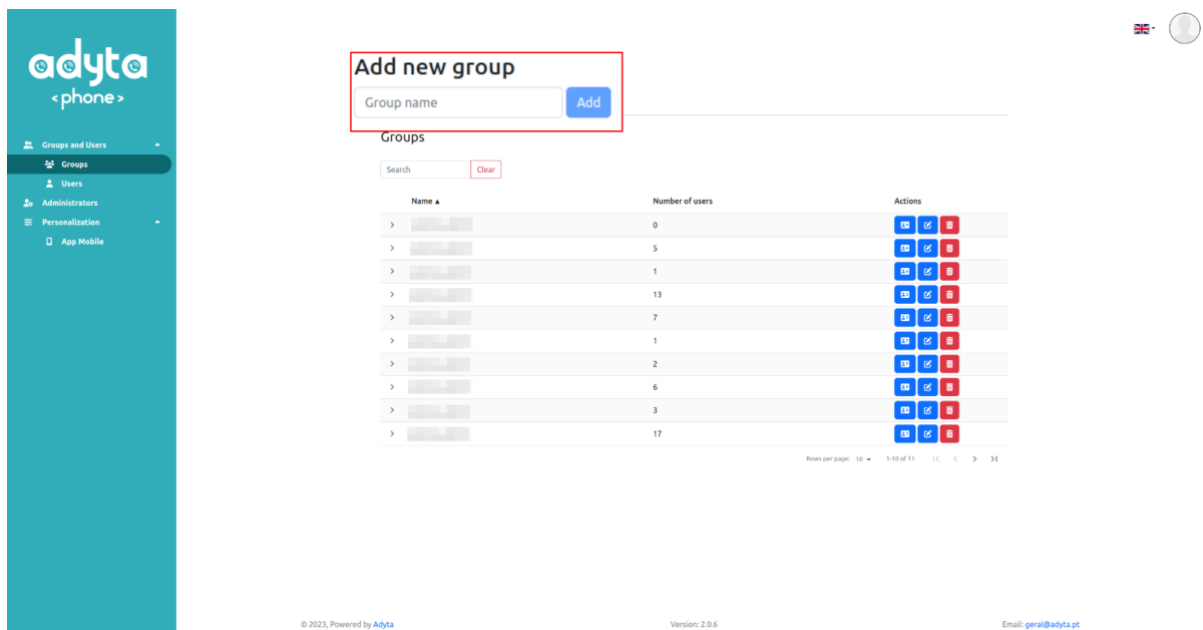
Access the user's groups dashboard by clicking on "Groups" on the sidebar.



Figure 4 - Sidebar: Groups dashboard

2.1. Create user's group

On the Groups dashboard page, on the top, there is a form where the administrator can create a new user group. The administrator will need to add a name to the group.



The screenshot shows the 'Add new group' form with a text input for 'Group name' and an 'Add' button. Below the form is a table of existing groups. The table has columns for 'Name', 'Number of users', and 'Actions'. The 'Actions' column contains icons for edit, delete, and add.

Name	Number of users	Actions
> [redacted]	0	[edit] [delete] [add]
> [redacted]	5	[edit] [delete] [add]
> [redacted]	1	[edit] [delete] [add]
> [redacted]	13	[edit] [delete] [add]
> [redacted]	7	[edit] [delete] [add]
> [redacted]	1	[edit] [delete] [add]
> [redacted]	2	[edit] [delete] [add]
> [redacted]	6	[edit] [delete] [add]
> [redacted]	3	[edit] [delete] [add]
> [redacted]	17	[edit] [delete] [add]

Figure 5 - Groups dashboard: create user's group

2.2. Filter users list by user's group

Below the form to create a new group is displayed a list of all user's groups. By clicking on any one of them the administrator can filter the user list to those belonging to that user group.

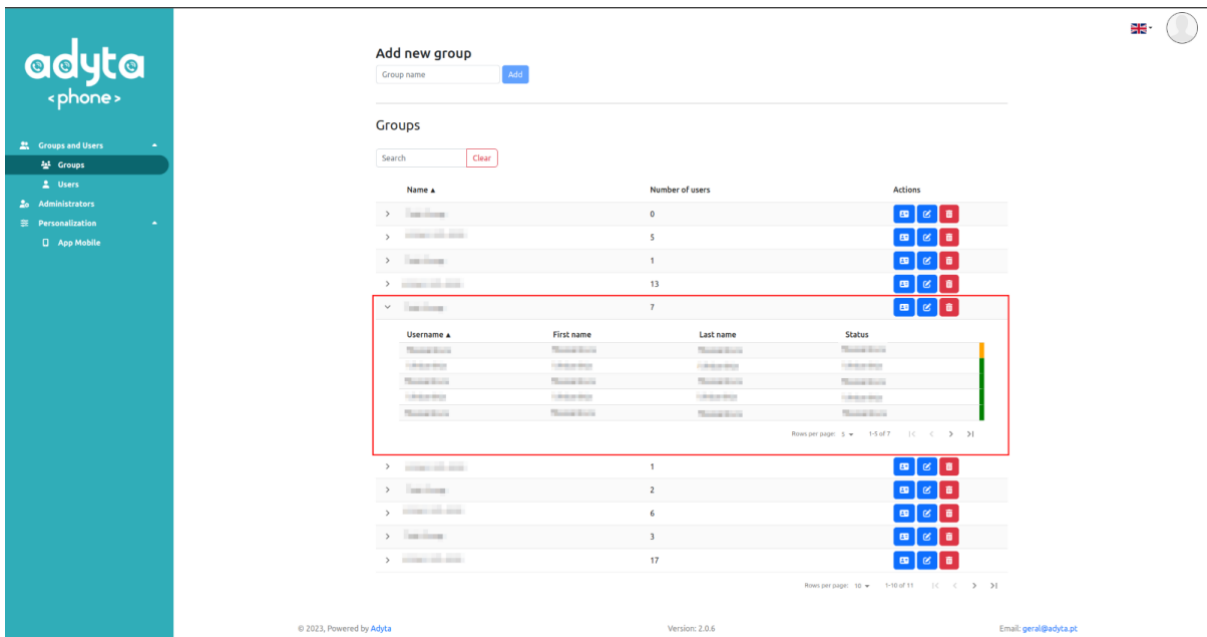


Figure 6 - Groups dashboard: selecting/filtering by user's group

2.3. Edit user's group

On the group list of the Groups dashboard page, in the "Actions" column, there is a button "Edit group".

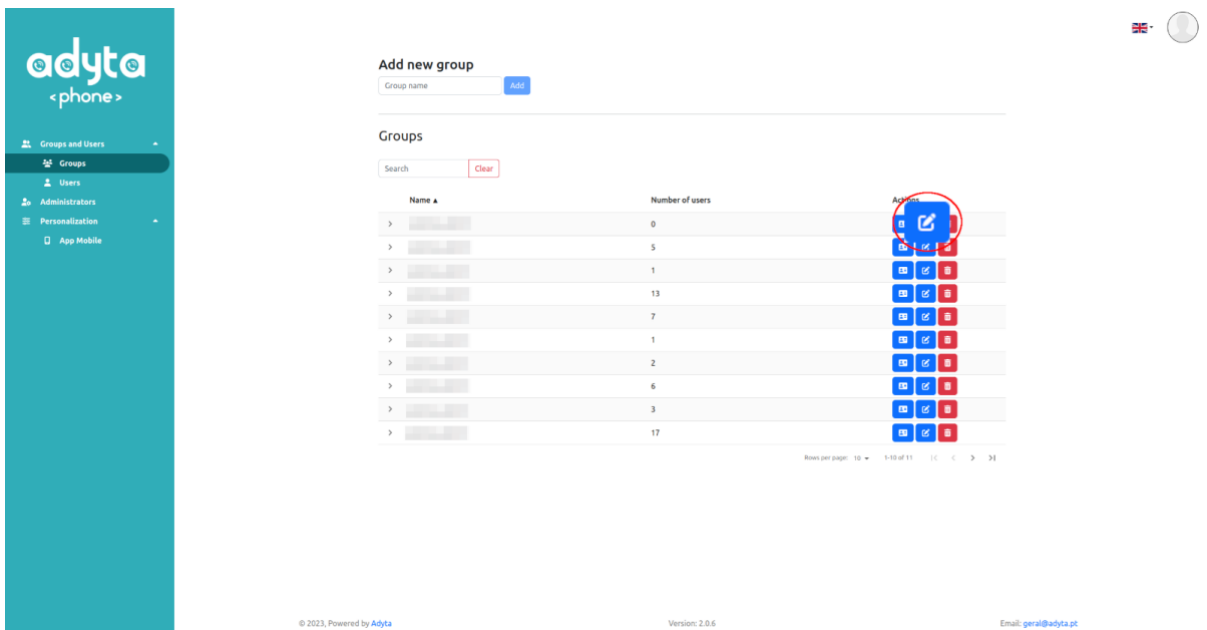


Figure 7 - Groups dashboard: option to edit user's group

Clicking on it, a modal is displayed showing all information regarding the group selected. Here, it is possible for administrators to associate or disassociate users to this group.

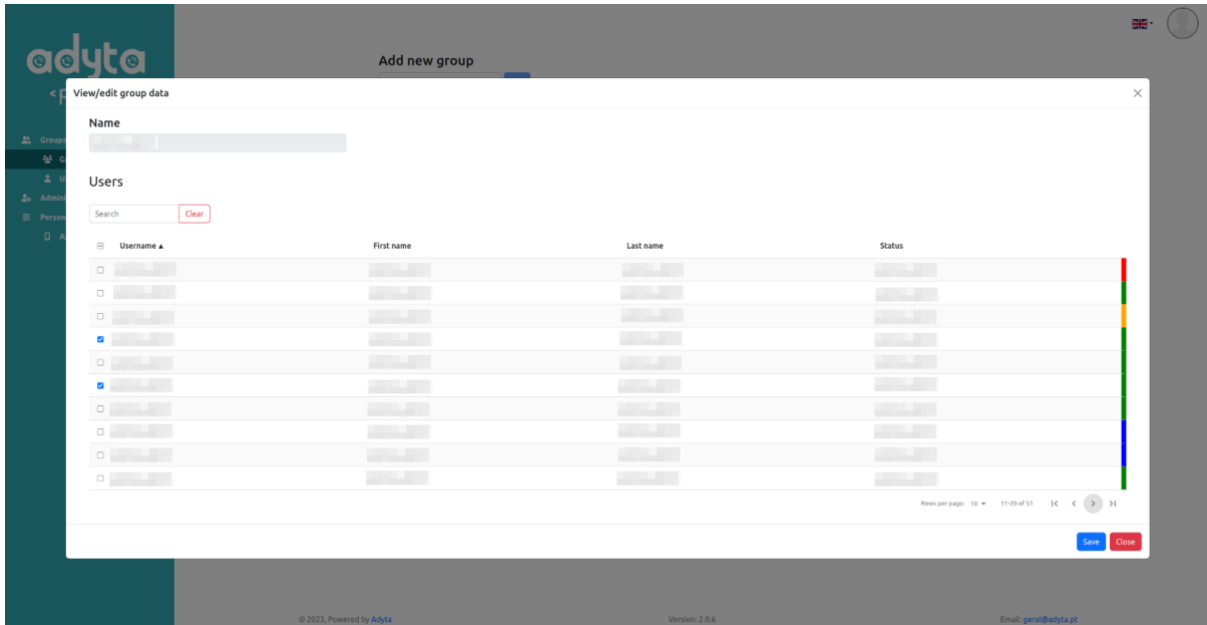


Figure 8 - Groups dashboard: view of user's group edition

Finished all changes, just click in the “Save” button present in the modal footer to submit them to the backend or click “Close” or any point outside the modal to discard any change and close the modal.

2.4. Delete user's group

On the groups list, in the column “Actions”, to delete a group simply click on the trash button of the group you want to delete.

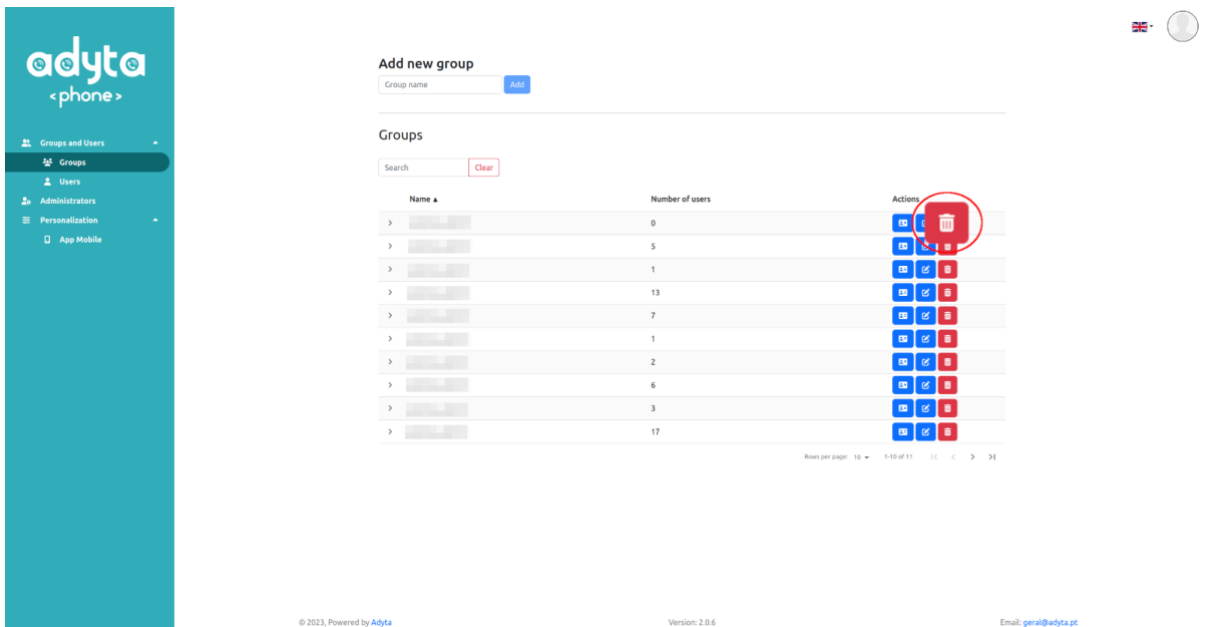


Figure 9 – Groups dashboard: option to delete user's group

A confirmation modal will show up. To proceed with the deletion of the user's group, click “Yes”. This also removes the group from all users it was a part of. Otherwise, to

close this modal without delete the user's group, just click "No" or any point outside the modal.

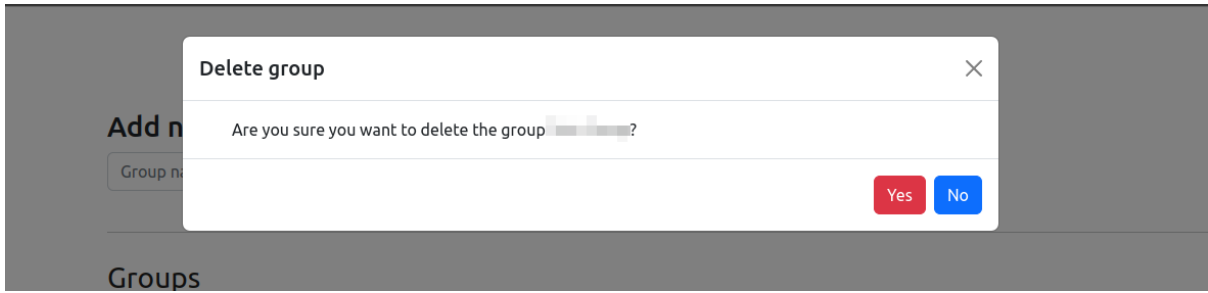


Figure 10 – Groups dashboard: confirmation of user's group deletion

3. Users Management

Access the user's dashboard by clicking on "Users" on the sidebar.



Figure 11 – Sidebar: Users dashboard

3.1. Create user

On the Users dashboard page, on the top, there is a form to create new users. The administrator will need to add a username, a first name and a surname.

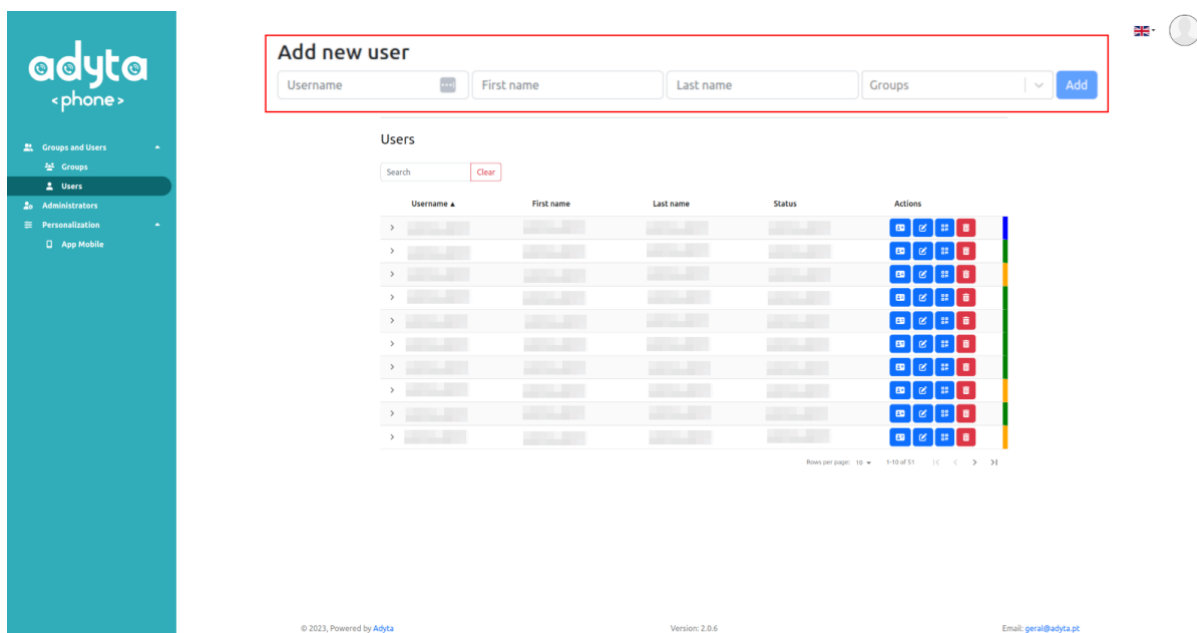


Figure 12 – Users dashboard: user creation

The administrator may also add the new user to existing user groups if it wishes to do so. Simply click on "Groups" and from the dropdown menu select the groups you want the user to join. By default, if a group is already selected, it will be also selected in this dropdown.

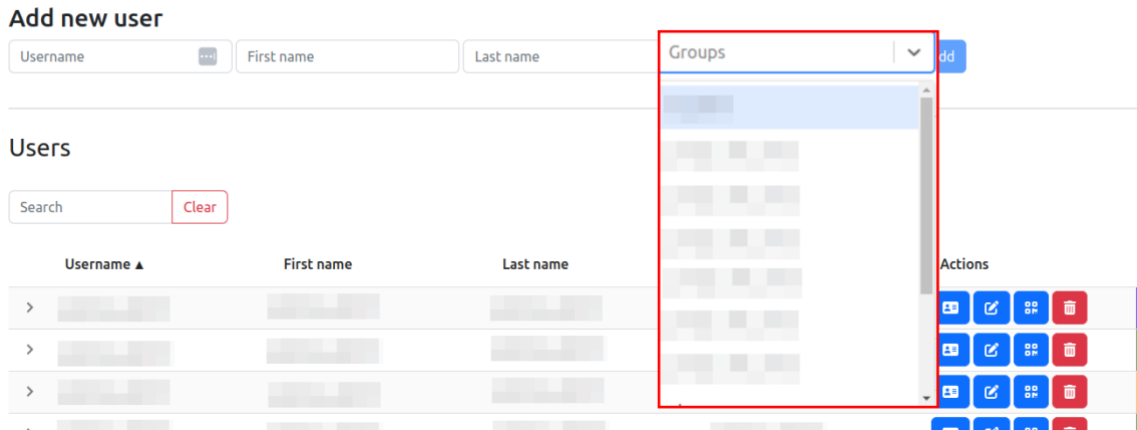


Figure 13 – Users dashboard: managing groups of new user

To finish the process, click on the “Add” button to add a new user.

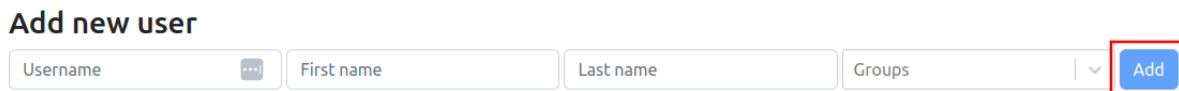


Figure 14 – Users dashboard: add new user

3.2. Filter groups list by user

Below the form to create a new user is displayed a list of all users. By clicking on any one of them the administrator can filter the groups the user belongs to.

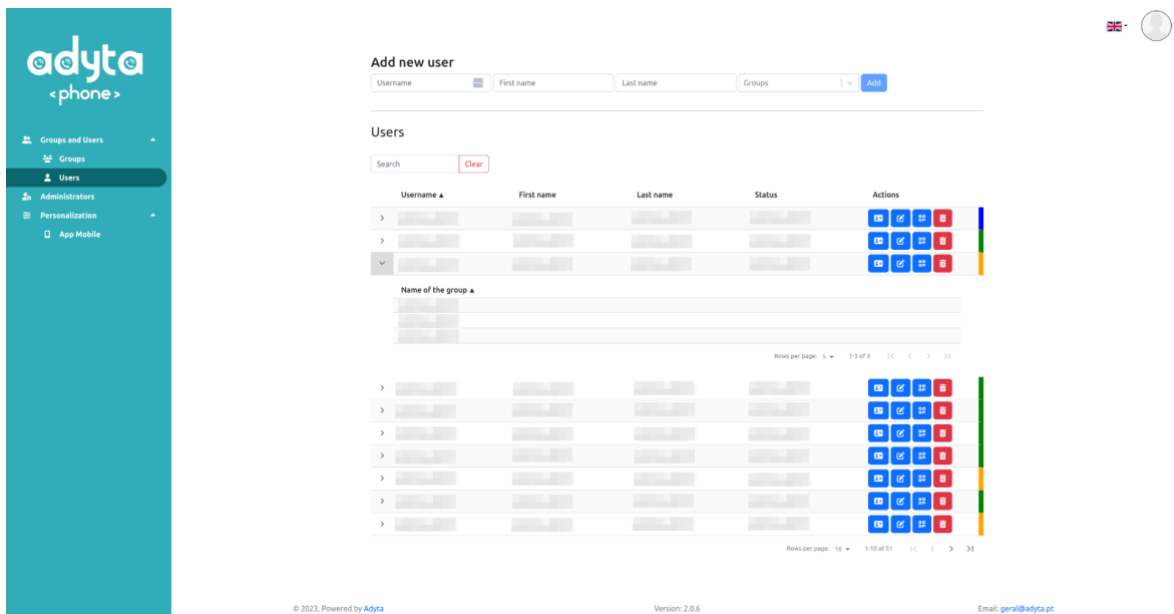
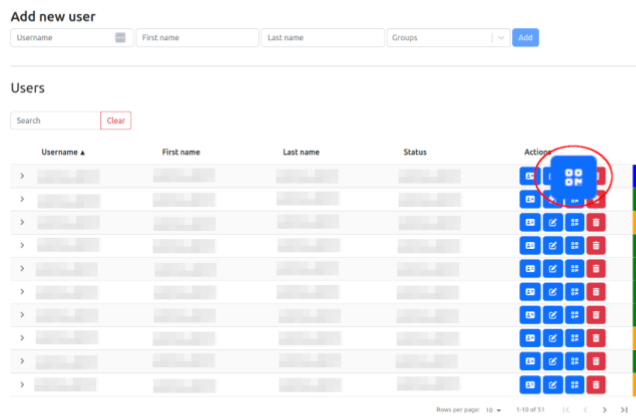
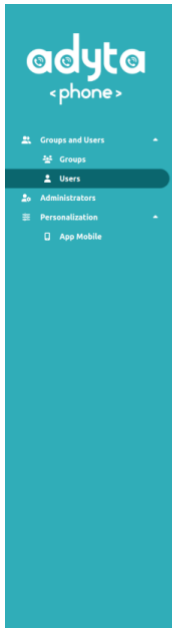


Figure 15 – Users dashboard: selecting/filtering by user

3.3. Generate QR code for user

For each user in the users list of the Users dashboard page there is a button to generate a QR Code.



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Figure 16 – Users dashboard: generating QR code

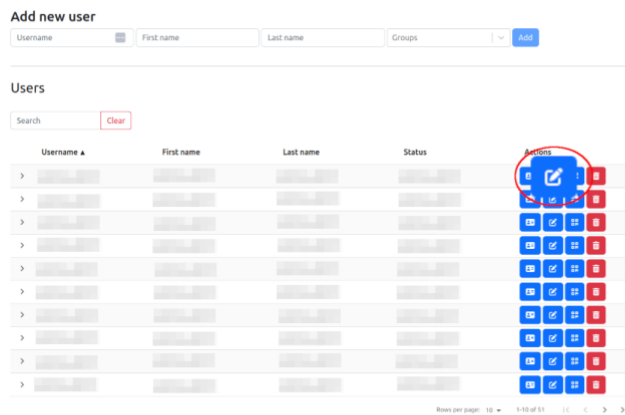
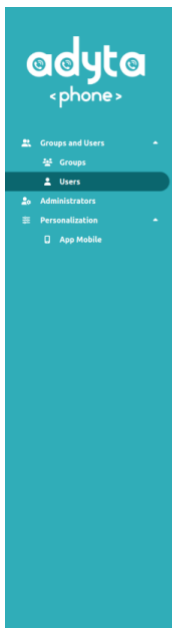
Click on that button to open a modal with the QR code preview (only works in desktop environment). There is the option to download the QR code to your machine as well.



Figure 17 – Users dashboard: QR code

3.4. Edit user

On the users list of the Users dashboard page, in the “Actions” column there is a button “Edit user”.



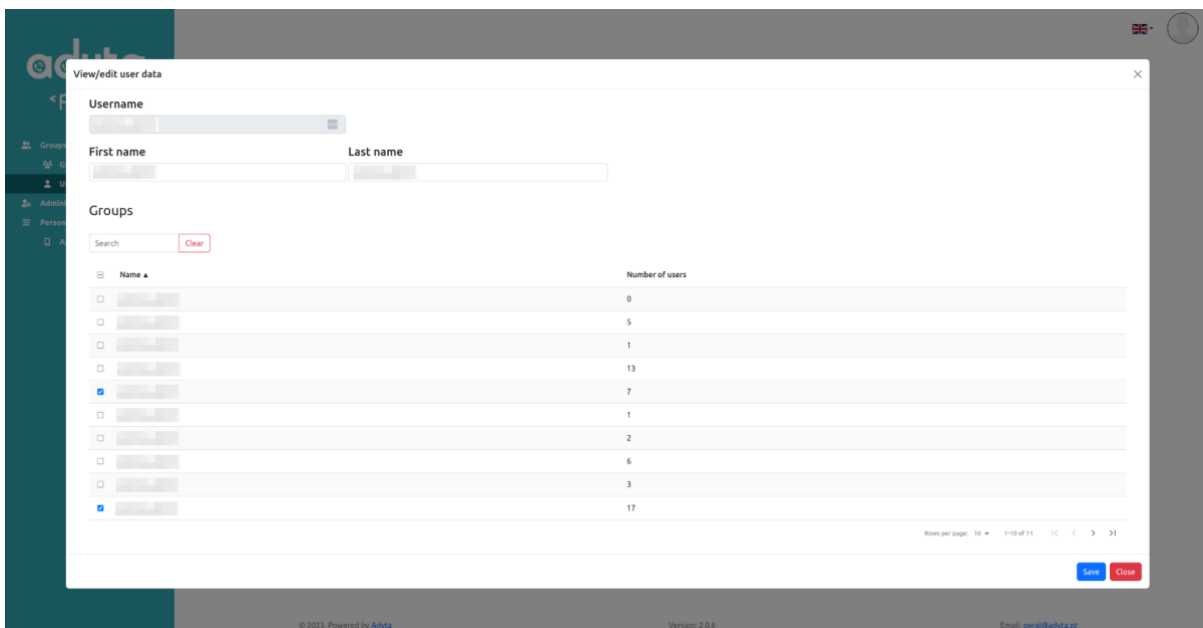
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Figure 187– Users dashboard: option to edit user

Clicking on it, a modal is displayed showing all information regarding the selected user. Here, it is possible to change the first name, surname and associate or disassociate this user to groups.



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Figure 19 - Users dashboard: view of user edition

Finished all changes, just click in the “Save” button present in the modal footer to submit them to the backend or click “Close” or any point outside the modal to discard any change and close the modal.

3.5. Delete user

On the Users dashboard page, a list of all users from all user groups is displayed, which includes a column “Actions”. To delete a user simply click on the trash button of the user you want to delete.

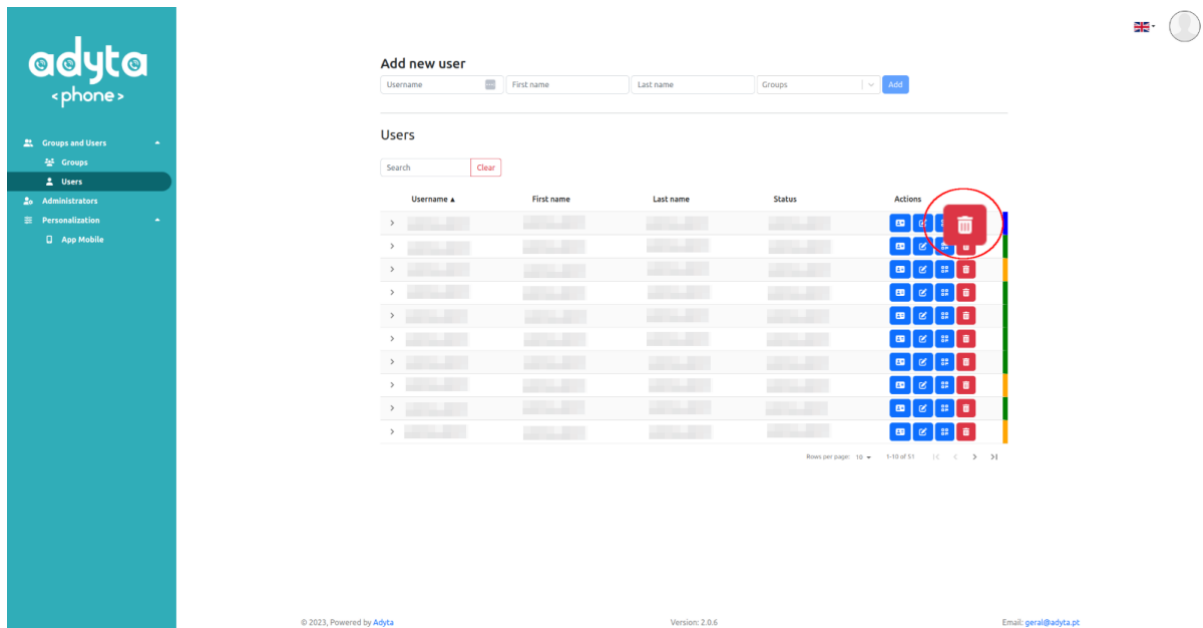


Figure 20 – Users dashboard: option to delete user

A confirmation modal will show up. To proceed with the deletion of the user, click “Yes”. This also removes the user from all user groups it was a part of. Otherwise, to close this modal without delete the user, just click “No” or any point outside the modal.

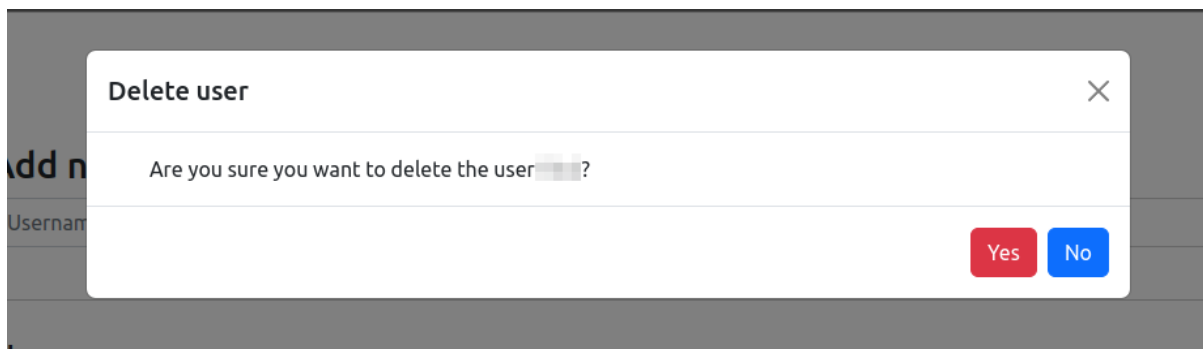


Figure 21 – Users dashboard: confirmation of user deletion

4. Administrator Management

Access the administrator dashboard by clicking on “Administrators” on the sidebar.



Figure 22 – Sidebar: Administrators option

4.1. Create new administrator

On the Administrators dashboard page, there is a list of all existing administrator accounts and a form on the upper part to create a new administrator. Fill in that form with the account username and password and click on the “Add” button to create the new administrator account.

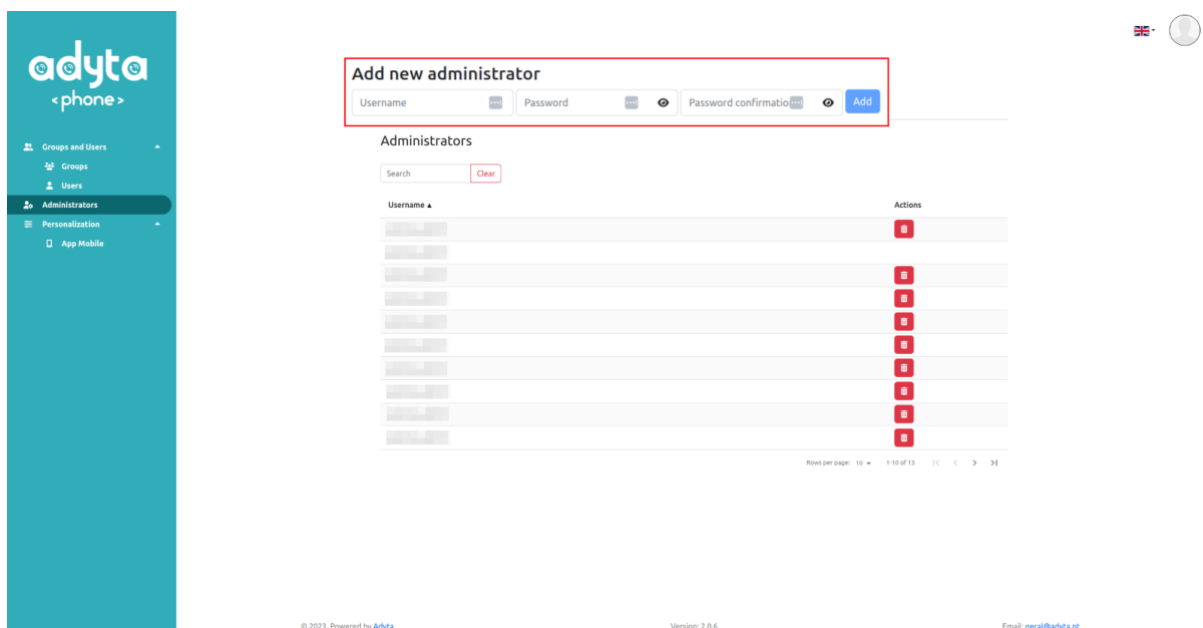


Figure 23 – Administrators dashboard: creating new administrator account

4.2. Delete administrator

On the groups list, in the column “Actions”, to delete an administrator simply click on the trash button of the administrator you want to delete. Notice that the delete button is missing on one of the lines. This is because that line belongs to the current user of the platform, who can only delete his own account by accessing the “My Account” area.

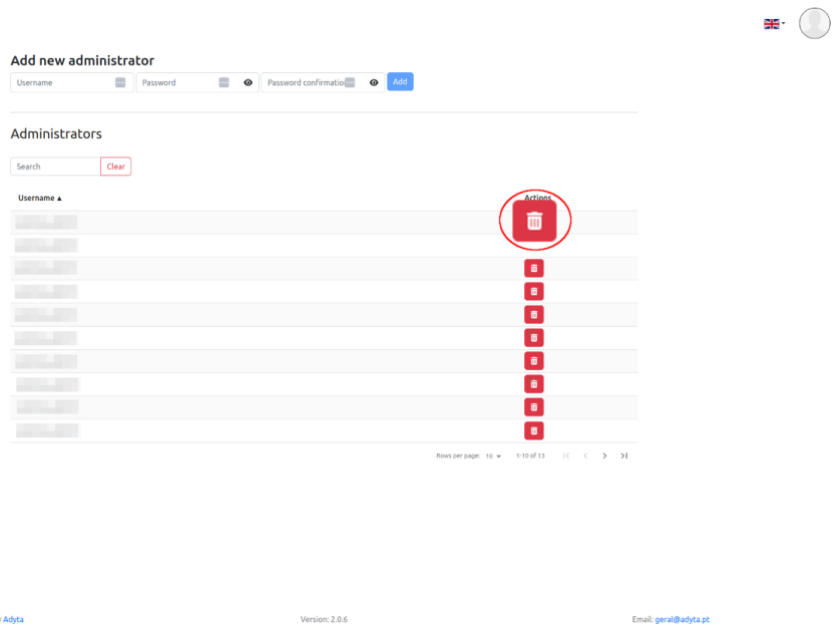
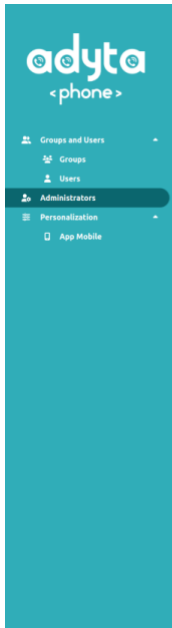


Figure 24 – Administrators dashboard: option to delete an administrator

A confirmation modal will show up. To proceed with the deletion of the administrator, click “Yes”. This will remove permanently the access of this administrator to the platform. Otherwise, to close this modal without delete the user, just click “No” or any point outside the modal.

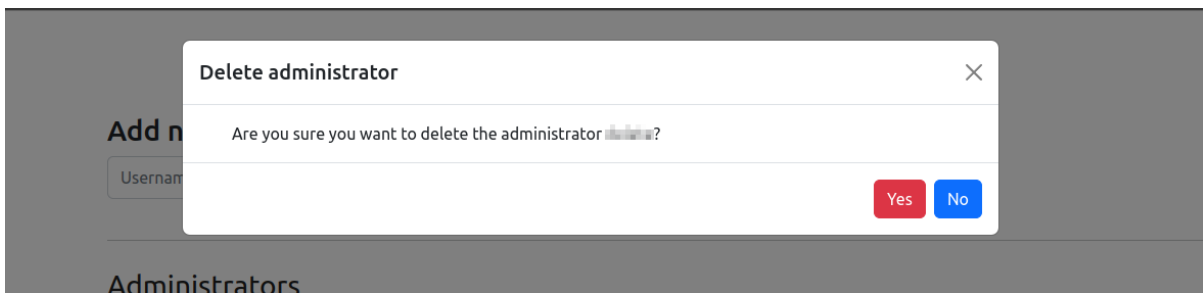


Figure 25 – Administrators dashboard: confirmation of administrator deletion

5. Assets Customization

Adyta.Phone provides assets' customization to business clients. To use this functionality, the administrator can open "App Mobile" tab under "Personalization" on the sidebar.



Figure 26 – Sidebar: Personalization App Mobile

In this page the administrator can define the banner to be used as Adyta.Phone's chat's background image and the logo to be used in Adyta.Phone's business accounts in both, light and dark mode.

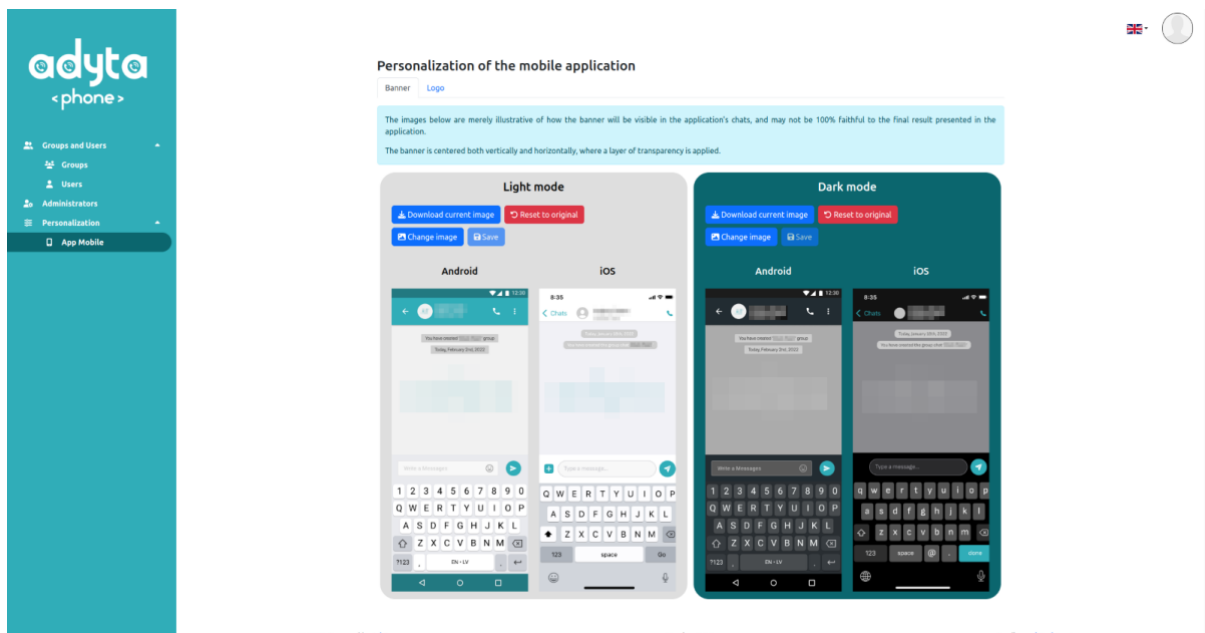
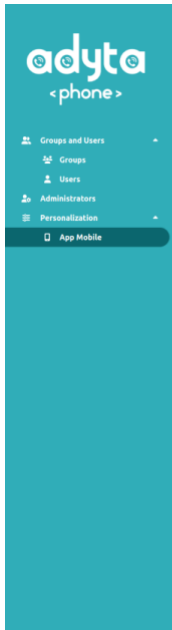
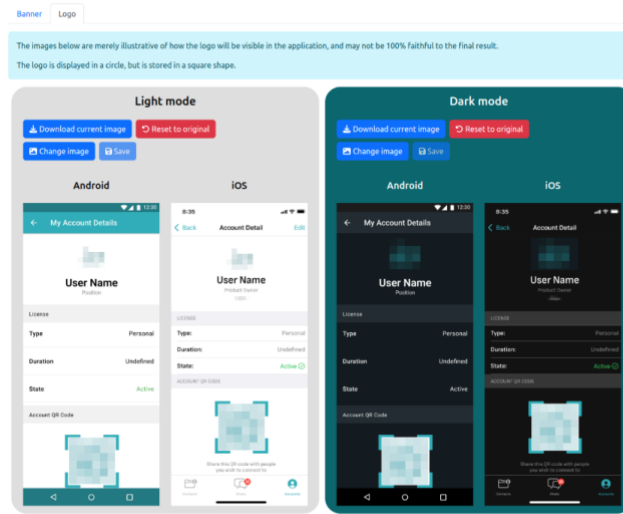


Figure 27 - Personalization: banner



Personalization of the mobile application



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Figure 28 – Personalization: logo

The buttons above the preview image images allow the administrator to:

- **Download current image:** it downloads the current image displayed in the preview, even if it is not saved.
- **Reset to original:** it resets the default image defined during the installation.
- **Change image:** it allows the administrator to upload a new image, edit the current image by zooming it or rotating it, and discard any unsaved change.
- **Save:** it saves all changes made.

The “Download current image” and “Save” options are straight forward actions. The first one downloads the PNG image to the administrator machine and the second one saves all changes made to the backend.

The “Reset to original” option asks for the administrator confirmation, ensuring that the image was not unintentionally restored to the original.

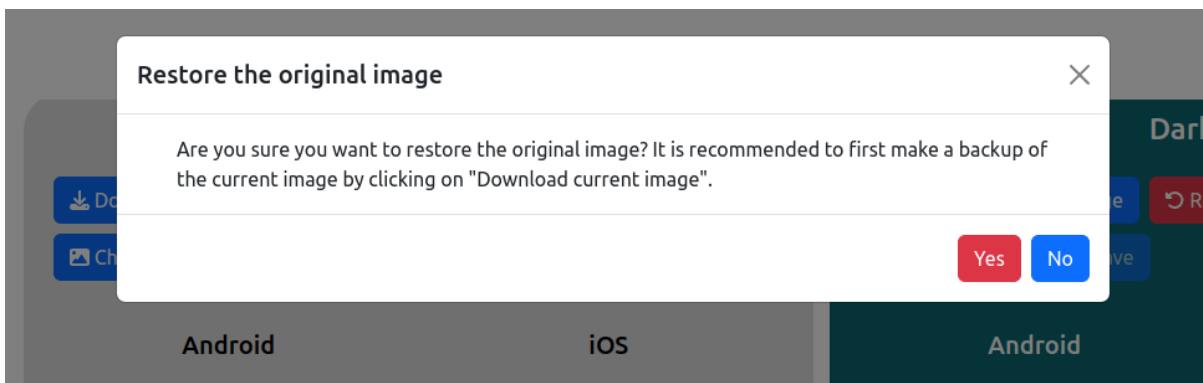


Figure 29 – Personalization: confirmation of the original image reset

The “Change image” option opens a modal where the administrator can upload a new image to replace the old one (1), edit the image by zooming it or rotate it (2) and discard any unsaved change (3).

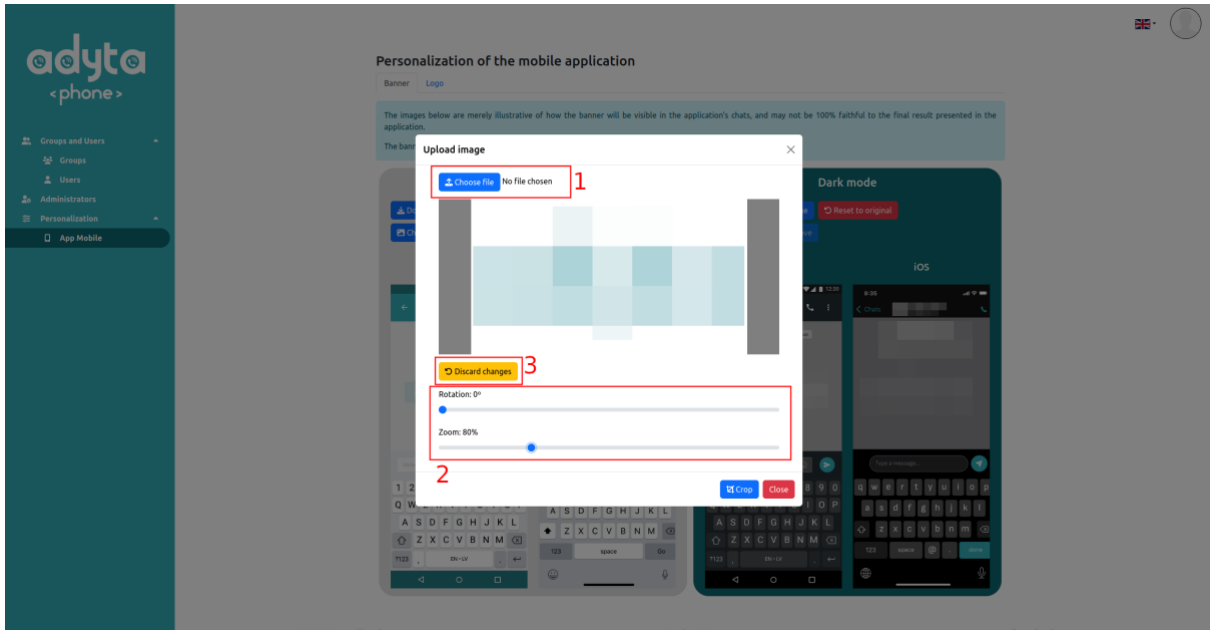


Figure 30 – Personalization: change image

Clicking on the “Crop” button in the modal footer will close the modal and update the preview image with the changes made. Otherwise, to close this modal without replicating the changes in the preview, just click “Close” or any point outside the modal.

6. My Account

Every administrator has a personal area, which is accessible from the profile picture, on “My account” option.

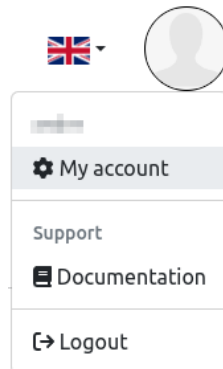


Figure 31 - Location of the “My account” option

In this page, the administrator can (for now) change their password and delete their account permanently.

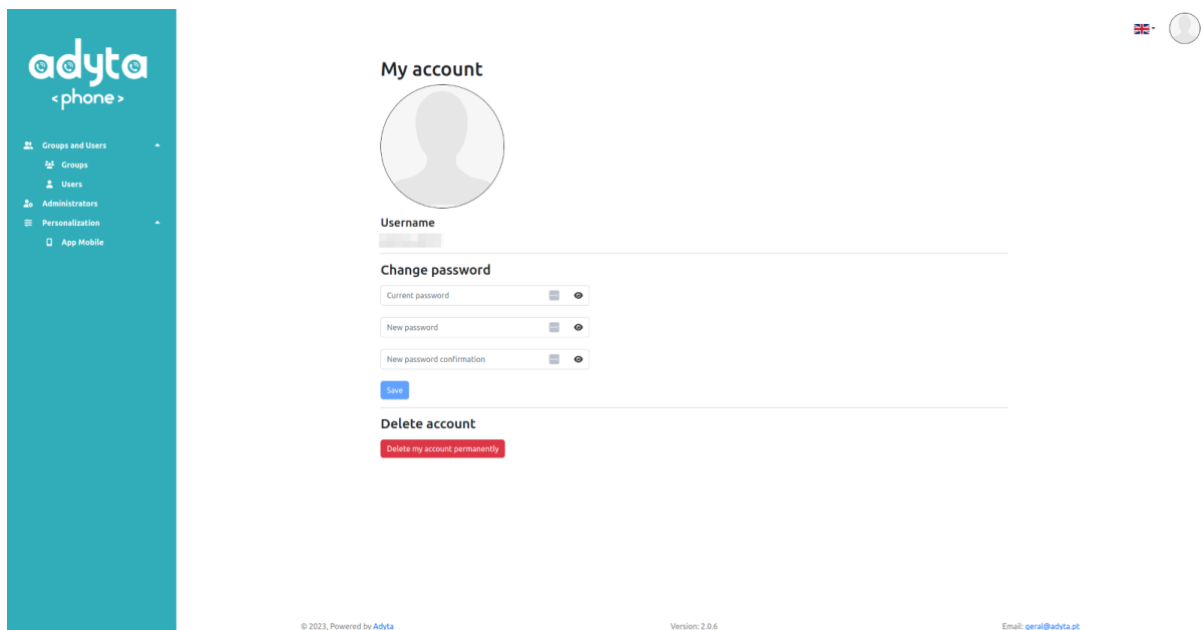


Figure 32 - My account: administrator personal area