WORKDESK

ADMIN MANUAL

Date	Version	Changed By	Changes
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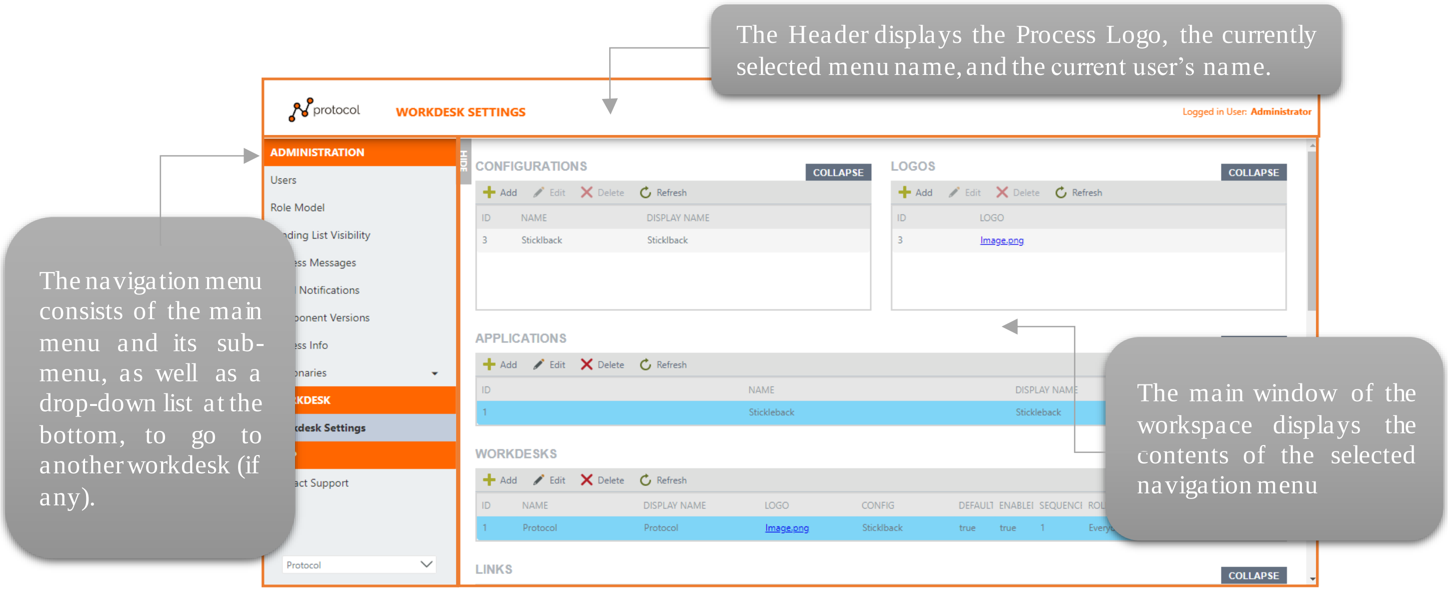
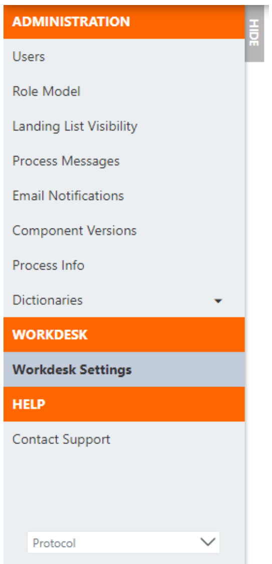
Review

This document contains an admin guide for configuring and working with Workdesk (administration panel) for a Protocol process that uses the K2 Five application platform. Workdesk is a tool, which helps to manage and configure applications.
The main window consists of three parts: the header, the navigation menu, and the main workspace window.



Navigation menu



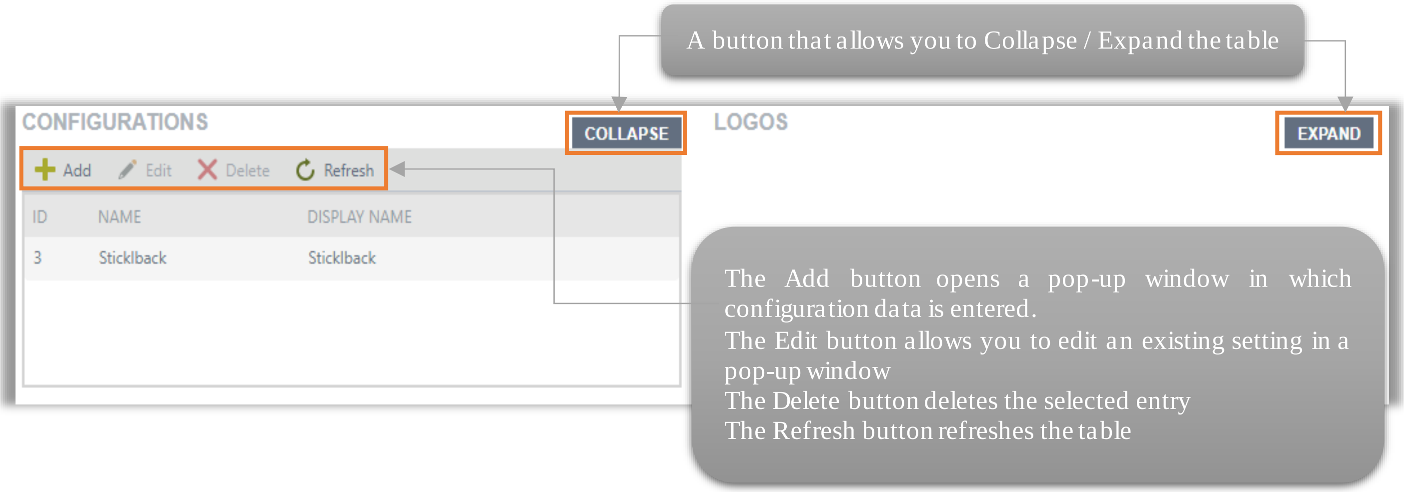
This menu consists of the main menu Administration, Workdesk, Help, and sub-menus, as well as a drop-down list with the ability to switch to another workdesk and a Hide button that allows you to collapse this menu.

WORKDESK SETTINGS

This menu allows you to configure both a new workdesk and edit an existing one. To do this, go to the Workdesk Settings link and fill in the proposed data tables in the main working window.

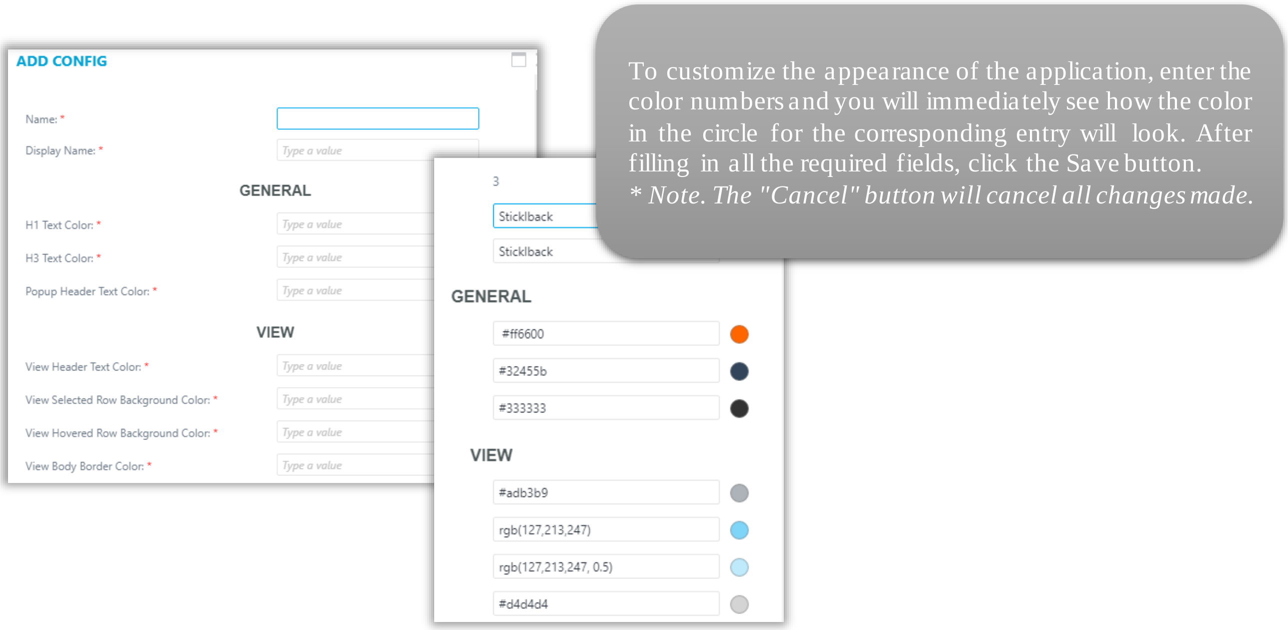
Workdesk Settings

On the Workdesk Settings tab, you can add applications, logos, menu links, users and determine their roles, also manage the appearance by changing colors and fonts. There are seven configuration view available in this submenu: Configurations, Logos, Applications, Workdesks, Links, Roles, Role Members. Also, for each table, there is a toolbar with functional buttons and a button that allows you to Collapse / Expand the table for more convenient work.



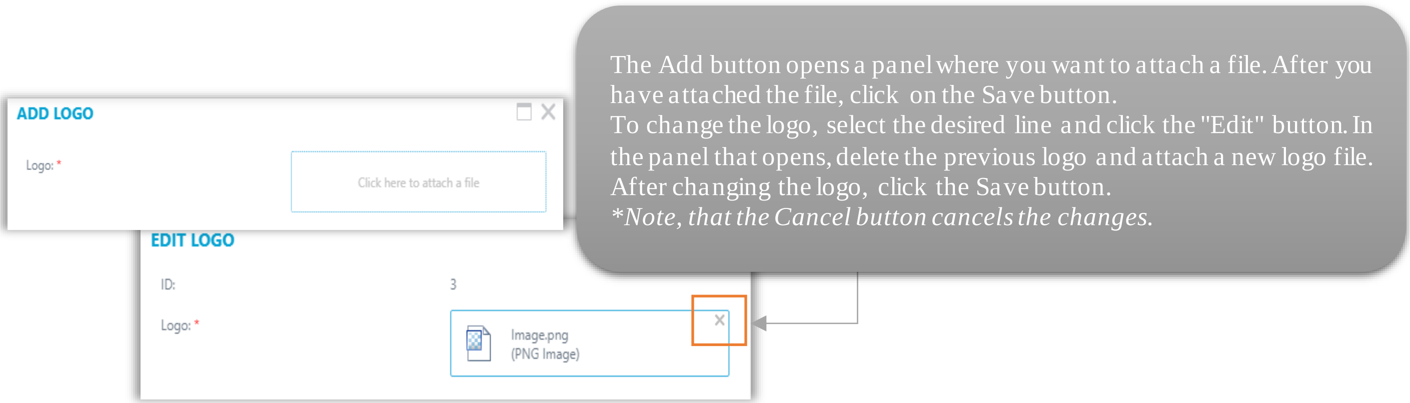
✓ Configuration

In the pop-up window of this view, the required fields Name, Display Name, as well as the color configuration of the entire system of fonts, backgrounds, and buttons are filled. If desired, you can edit the current styling for each control.



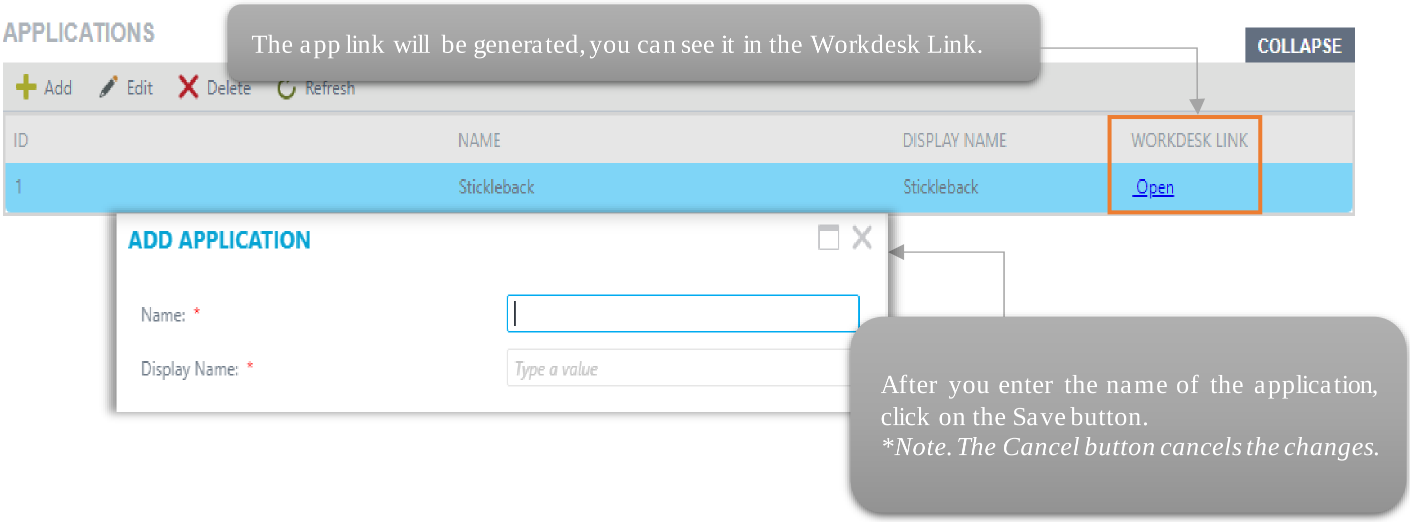
✓ Logos

This view is intended for loading/changing the logo.



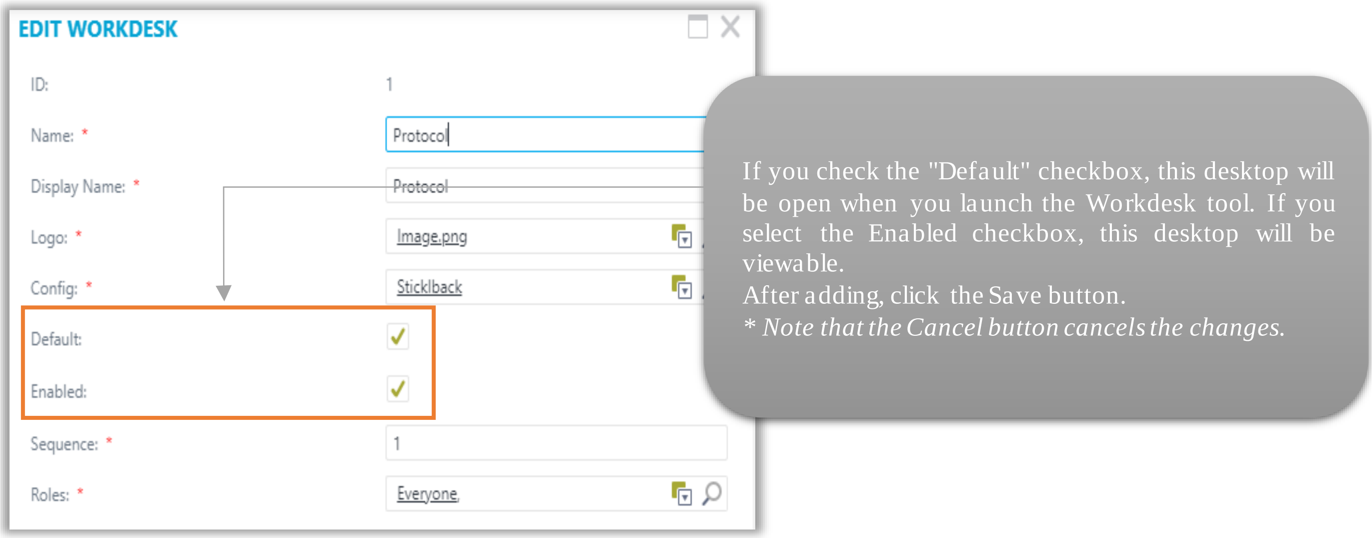
✓ Applications

Applications view helps to configure applications.



✓ Workdesks

This view helps you add and customize the desktops that will be in your application. For this it is necessary for the window that opens, to enter a name and a display name for the desktop. Select a logo and configuration from those you add to the Logos and Configurations views, respectively. Enter the desktop sequence where the desktops will be displayed. After that, select the roles of users who can see this menu on navigation panel (there can be several roles).



✓ Links

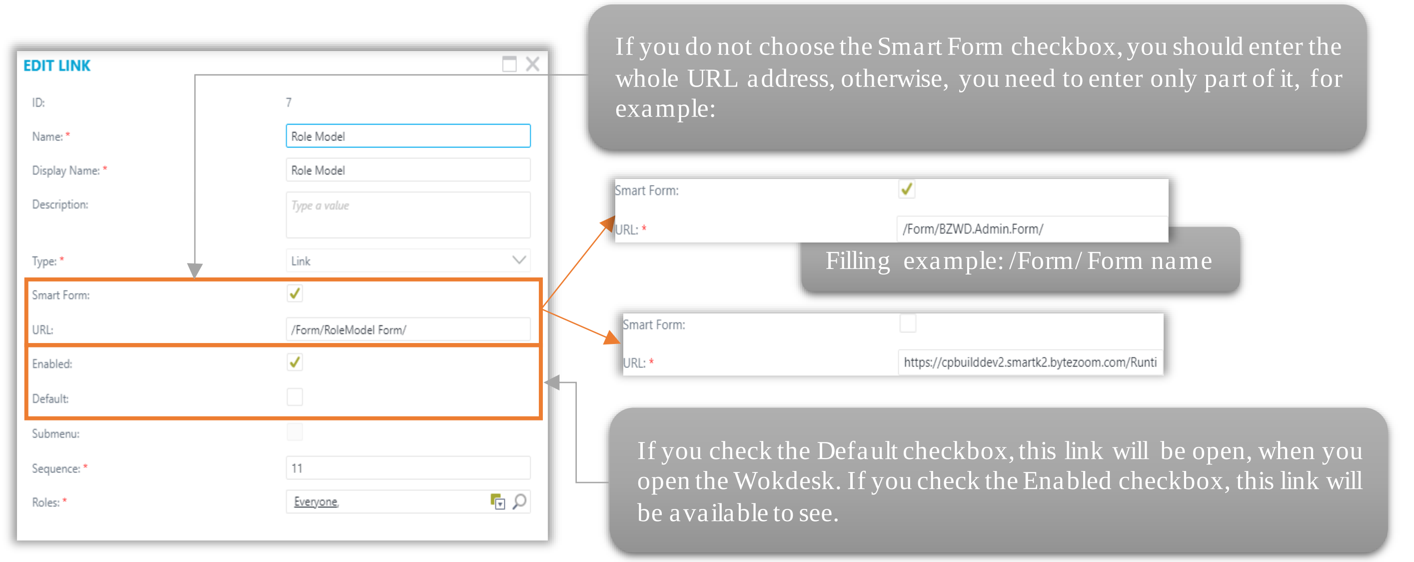
The "Links" view is designed to populate the navigation menu located on the left Navigation menu.

**Note, to configure links you should at the first select application from the Applications view and workdesk from the Workdesk view, where you will use links.*

**If you create the first link for workdesk, the default would be the Header link.*

To add a new link, click the Add button, then in the window that opens enter:

Enter Name and Display name. Fill in the Description field if you need it. Choose the Type from the drop-down list, it could be a Link or Header.

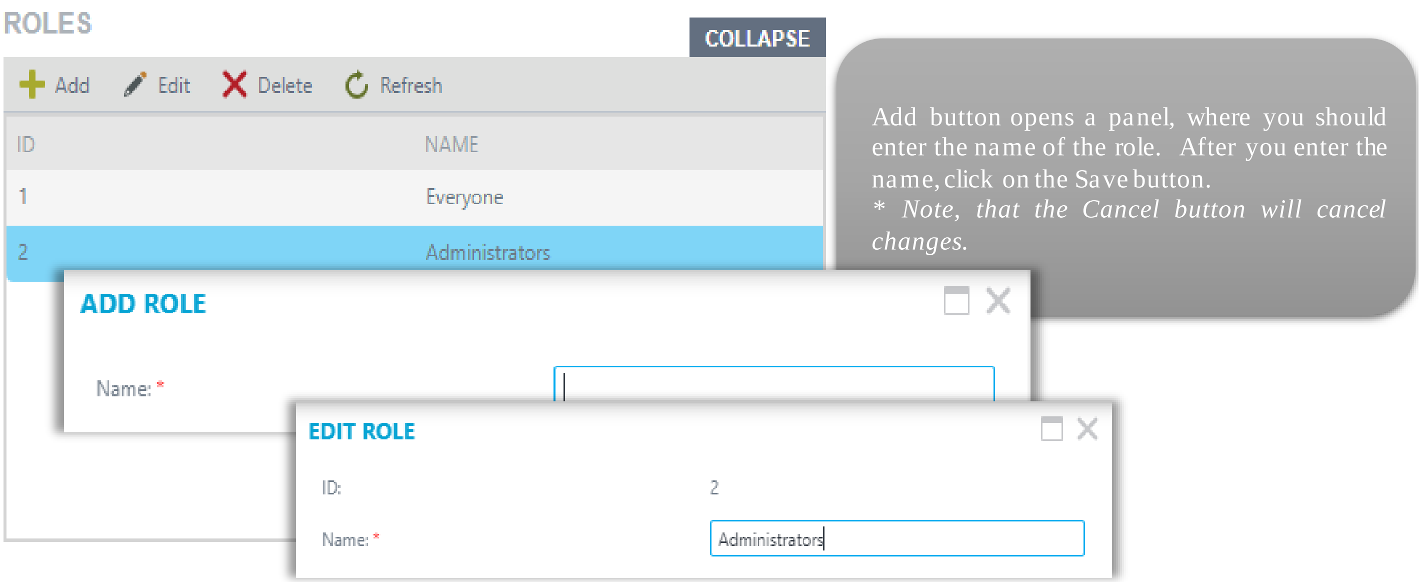


Check in Submenu checkbox if you want this link to be in the submenu of the other links. Then you should choose the Sequence of links on the left sidebar. This value determines the order in which menus are placed in the navigation bar and makes it easy to add a new entry in the right place. After, choosing the roles of users, who can see this menu on navigation panel (there can be several roles). After adding, click on the Save button.

**Note, the cancel button will cancel changes.*

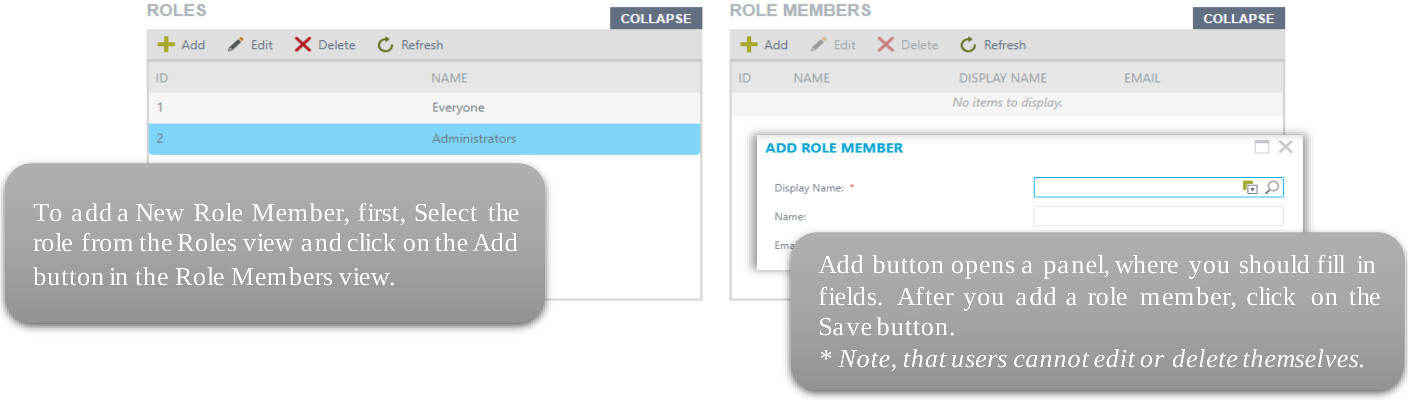
✓ Roles

This view is used for assigning roles.



✓ Role Members

This view for assigning members to the role.



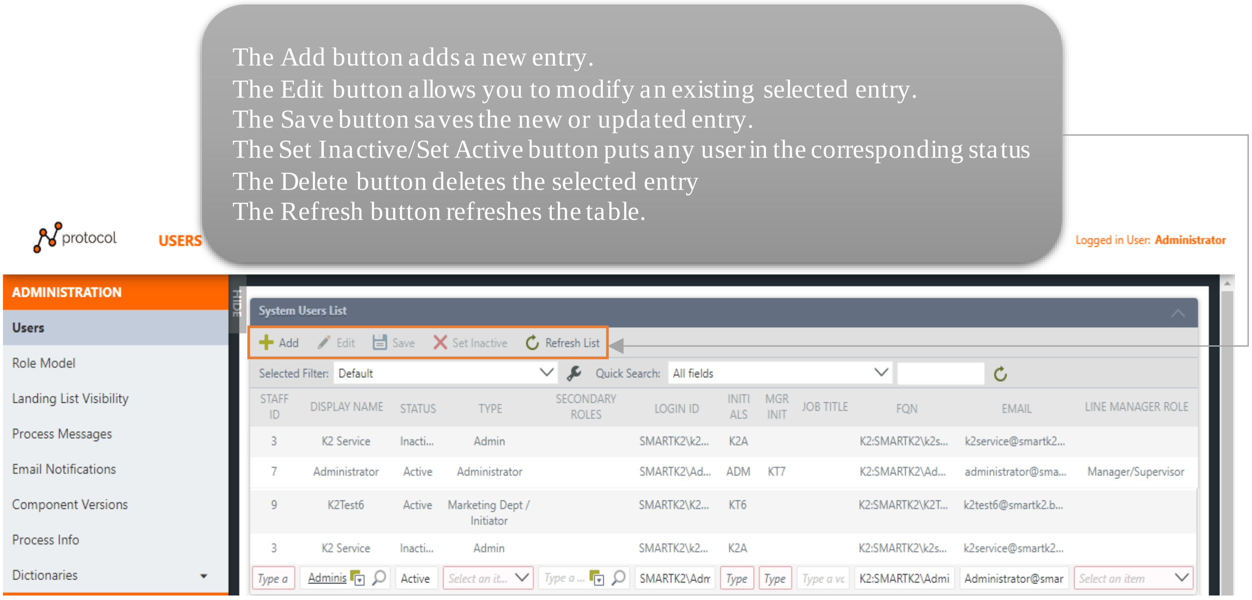
** Note, that the Cancel button will cancel changes.*

ADMINISTRATION MENU

User

In this view, users are configured who will have access to the system and its role in this system, respectively.

When adding a new record, you must select the DISPLAY NAME in the picker, after which most of the fields from Active Directory will be automatically filled with data. Required fields include EMPLOYEE ID, TYPE, and INITIALS.

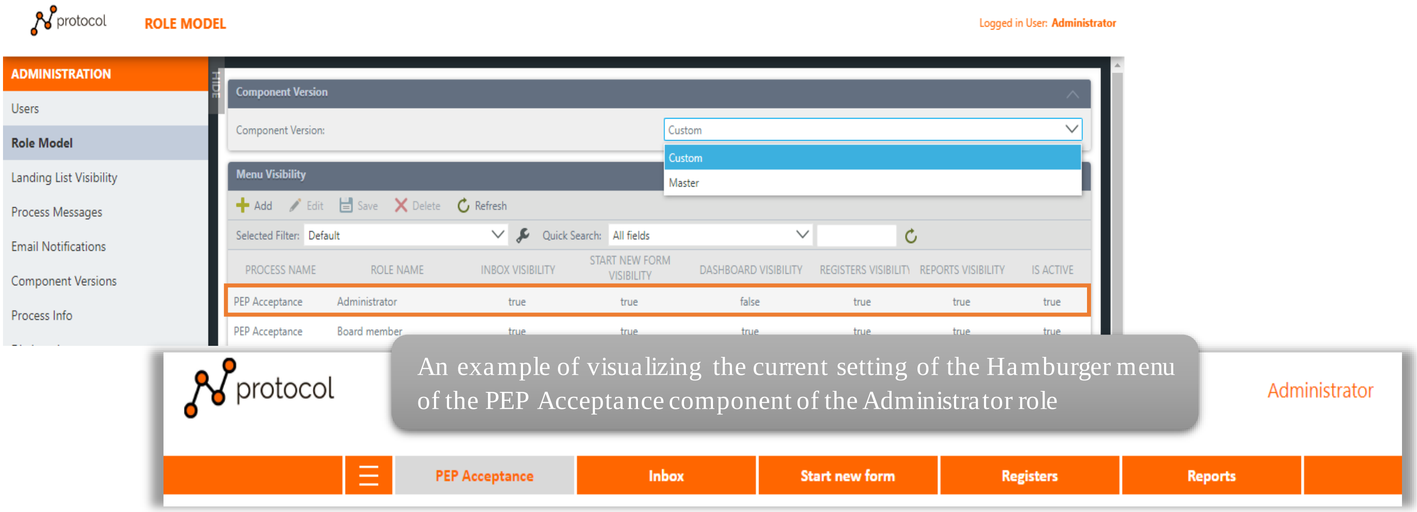


Role Model

This view has a setting for each role component and a specification of which Main Hamburger Menu items will be available for use There are two Component Versions:

- ➢ The Custom version shows for each role set menu access rights for selected Custom component
- ➢ Master version shows all settings for all roles and all components

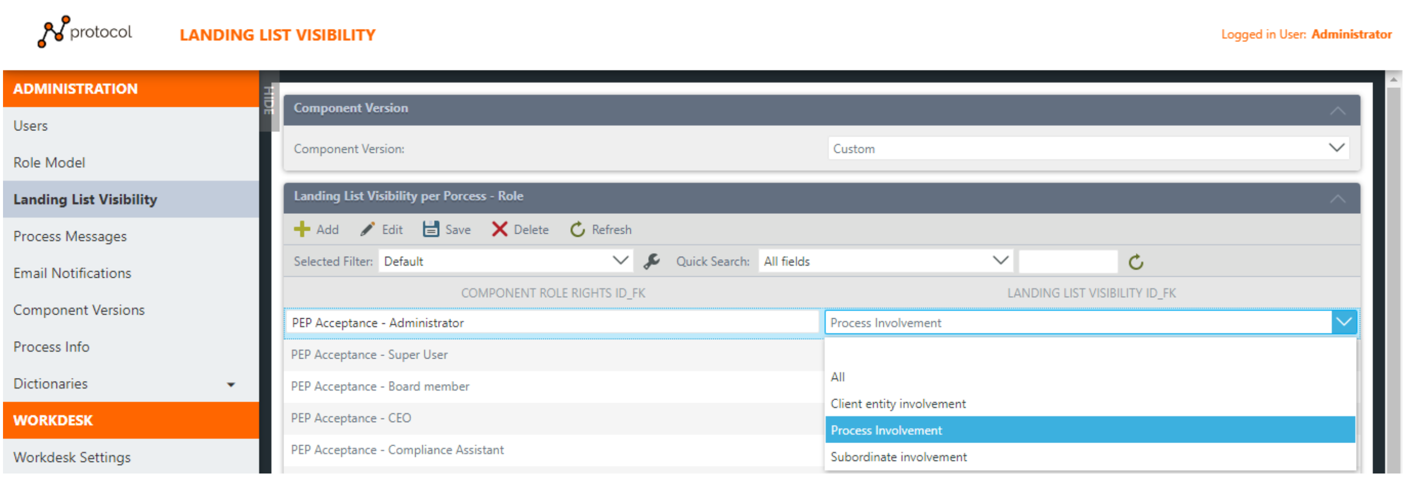
To display any of the Hamburger menu items, when adding or changing an entry, select the component of interest, the role, and set the checkboxes in accordance with the desired visualization



Landing List Visibility

For each component and role, the property of displaying processes in the Landing List is set. There are four types of access:

- All – all processes will be available for viewing in the landing list
- Process Involvement - only those processes in which the current user of this component participated will be available for viewing
- Subordinate involvement - processes in which the current user's subordinates participated for this component will be available for viewing (for this, subordination is applied according to the principle of a line manager)
- Client entity involvement - processes in which the current user's client participated for this component will be available for viewing

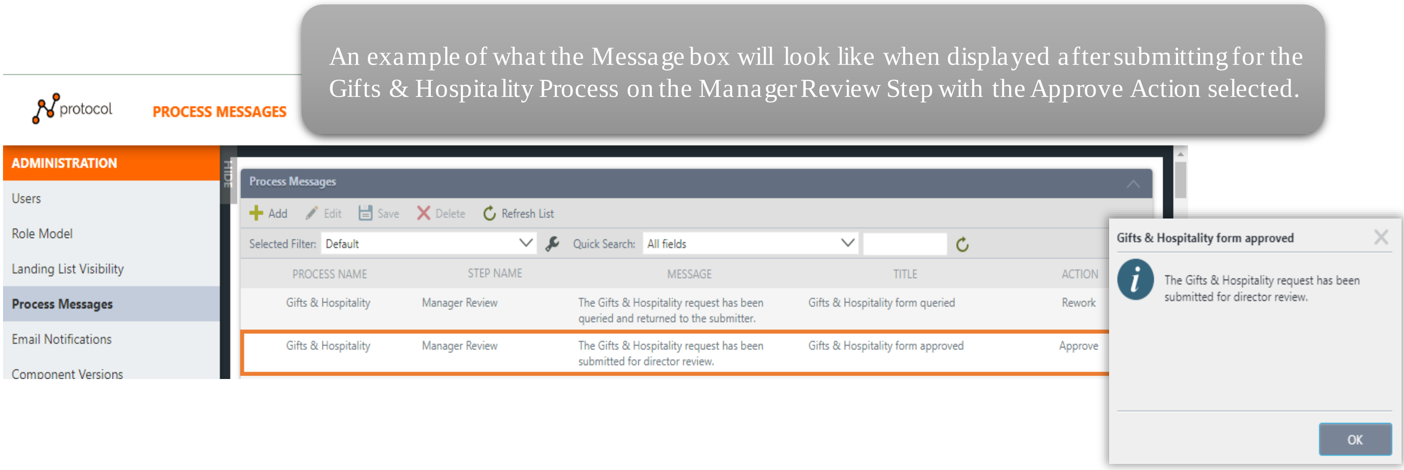


** The exception is the SuperUser role which has the ability to see all processes*

** SAR Component user has the ability to see the process if he is in the role of MLRO / DMLRO, this is configured programmatically.*

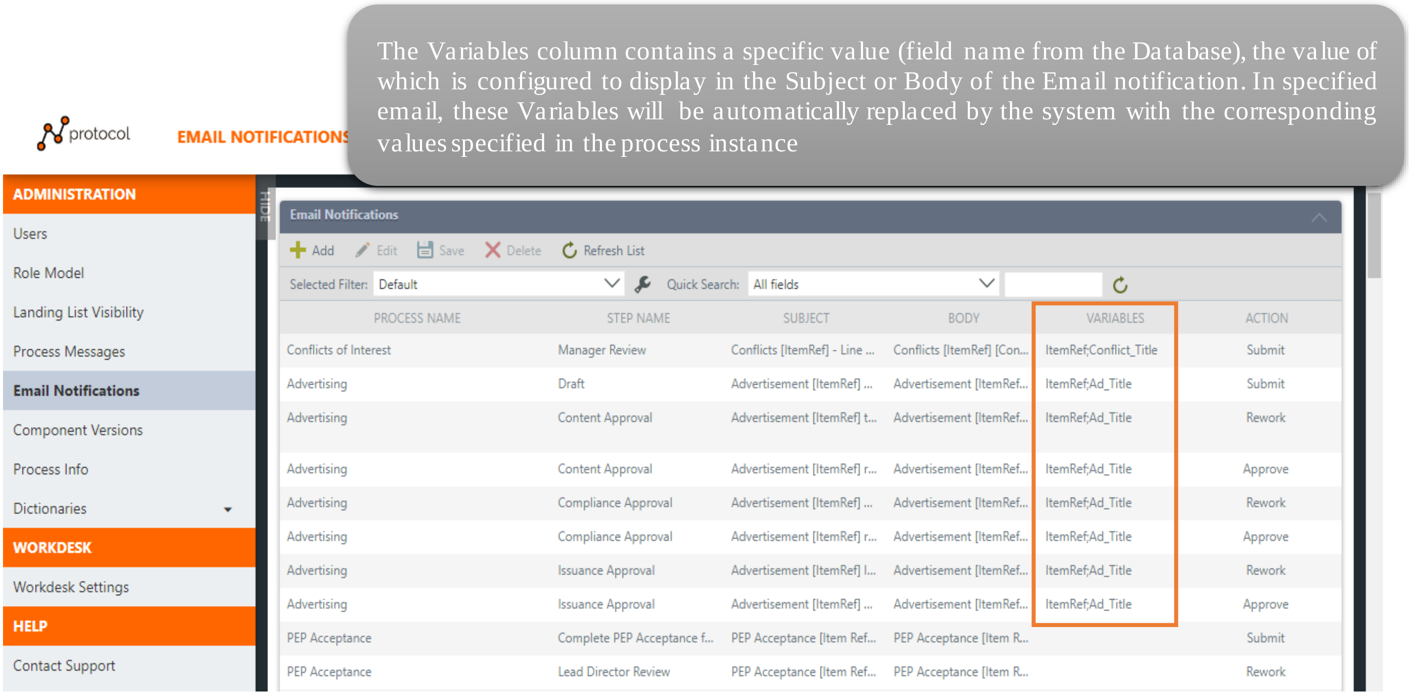
Process Messages

In this menu, you can configure the Title and Messages of all message boxes that will be shown for each Component at a specific Step with a determined Action selected after the form is submitted.



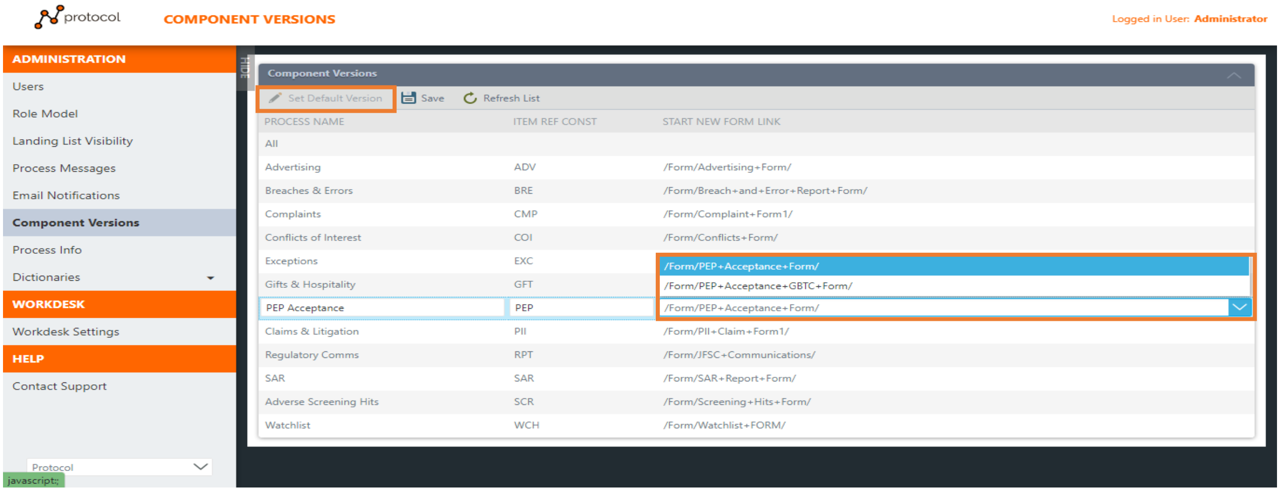
Email Notifications

In this menu, you can configure the Subject and Body Email Notifications that will be sent for each Component at a specific Step with a determined Action selected.



Component Versions

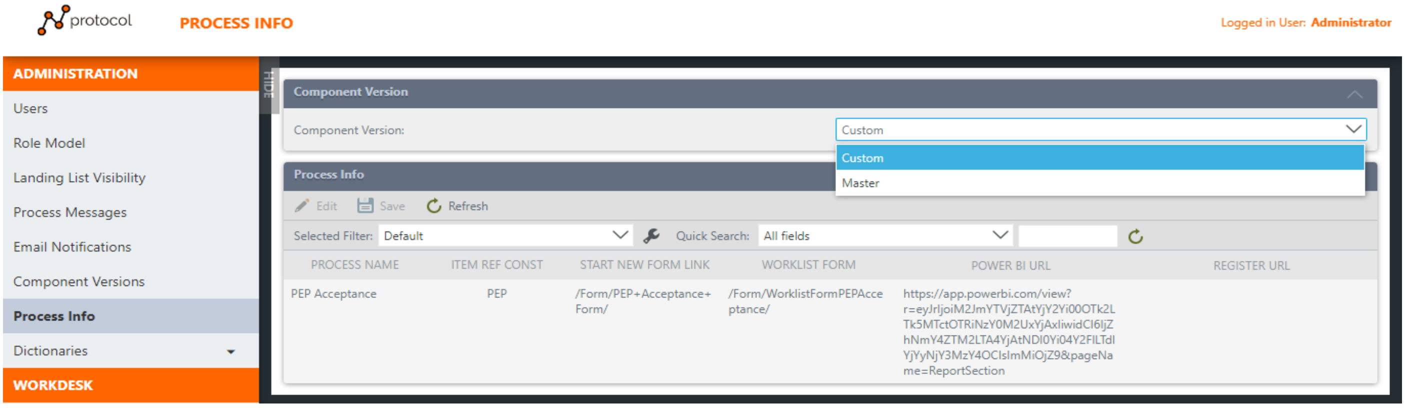
This view displays all Component names, their ITEM REF CONST, and START NEW FORM LINK. Provided that the component has versioning, you can switch in this table by selecting the required version of the selected component by clicking on the Set Default Version button from the drop-down list, and then be sure to click the Save button. After saving the changes, the specified version of the component will be used when starting a new process of the selected component



Process Info

This view provides the ability to edit links to the Start New Form, link to the Worklist form, Power BI URL, and Register URL.

At the same time, the Component Version menu is also available in which Master will display a complete list of all components and links, and in the Custom version, only those components that have several versions.



Dictionaries

This is a group of links that has the type of directories. And filled in manually or directly through the database. For the convenience of filling in any of the directories, a toolbar and a filter is located in the upper part of the view.