

Product manual

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CONTACT: JAKUB.ZIELINSKI@TABERNA.AI

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1. Introduction

1.1 What is Taberna?

Taberna is a Platform for Sharing Information (Reports, Content, Files, etc.) and Processes with Clients

This platform is designed to facilitate the seamless exchange of various types of information and processes with your clients. It supports the sharing of reports, content, files, PDF's, and more, ensuring efficient and secure communication.

Here are some key features:

User-Friendly Interface: Easy to navigate, ensuring that both you and your clients can quickly find and share the necessary information

Secure File Sharing: Robust security protocols to protect sensitive data during transmission and storage.

Collaboration Tools: Tools that allow for real-time collaboration on documents and projects.

Customizable Access Controls: Define who can view, edit, and share specific pieces of information, ensuring that only authorized individuals have access.

1.2 Taberna use cases

1. Client reporting

Scenario:

A consulting firm needs to share weekly performance reports with their clients.

Solution with Taberna:

Report sharing: Consultants can upload performance reports to Taberna, allowing clients to access them immediately.

Secure Access: Only authorized client representatives can view or download these reports, ensuring confidentiality.

Feedback Loop: Clients can leave comments or feedback directly on the reports, facilitating clear communication and swift action.

2. File Sharing and Storage

Scenario: An architecture firm needs to share design files and blueprints with clients and contractors.

Solution with Taberna:

Large File Support: Taberna allows the uploading and sharing of large files without compromising on speed or security.

Organized Storage: Files are organized in a structured manner, making it easy for clients and contractors to find what they need.

Access Controls: The firm can set permissions to control who can view, edit, or download specific files.

3. Use Case: Multi-Level Permissions and Scoped File Access in Taberna

Scenario: A project manager at a software development company needs to share various documents with different team members and clients, each with specific access levels and within defined scopes.

Solution with Taberna:

Permission Settings: The project manager assigns user permissions, designating some users with read-only access and others with admin permissions, which grant full access to all features and files.

File Scoping: The manager uploads files and assigns them to specific scopes—such as an organization-wide scope for company policies and a project-specific scope for development plans and progress reports

Access Control:

Users with read-only permissions can view files but cannot edit or delete them, ensuring data integrity.

Users with admin permissions can view, edit, and manage all files and settings, ensuring they can oversee and coordinate the entire project effectively.

Postconditions:

The project manager successfully manages document distribution and access, ensuring that team members and clients have appropriate access to the information they need, while maintaining security and organization.

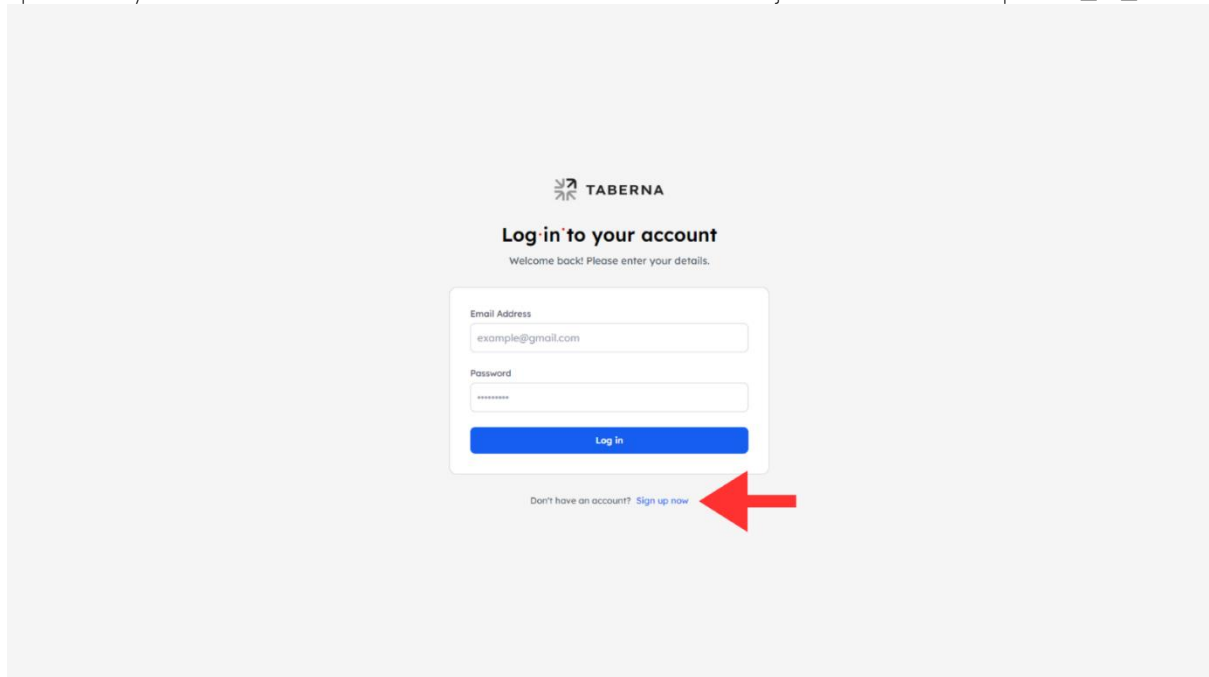
2. Getting started

To begin using Taberna, you must first register an account. Follow these steps to complete the registration:

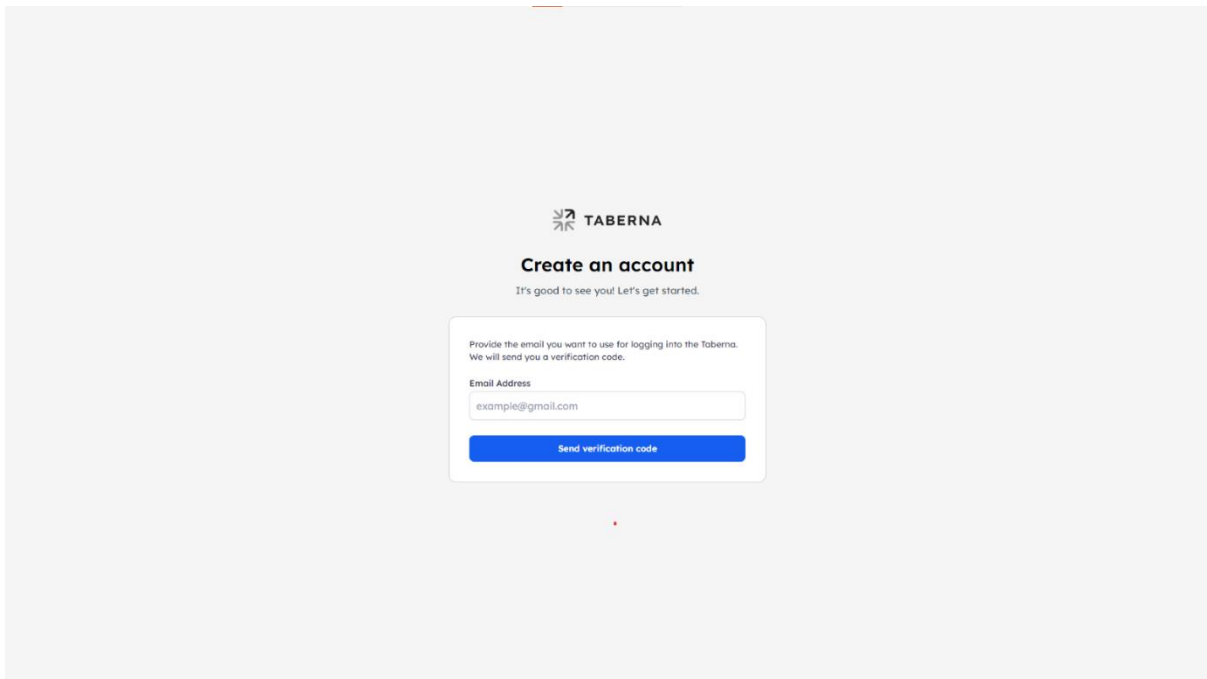
A) Sign Up with Email and Password:

-Navigate to the registration page on the Taberna platform or click this link:

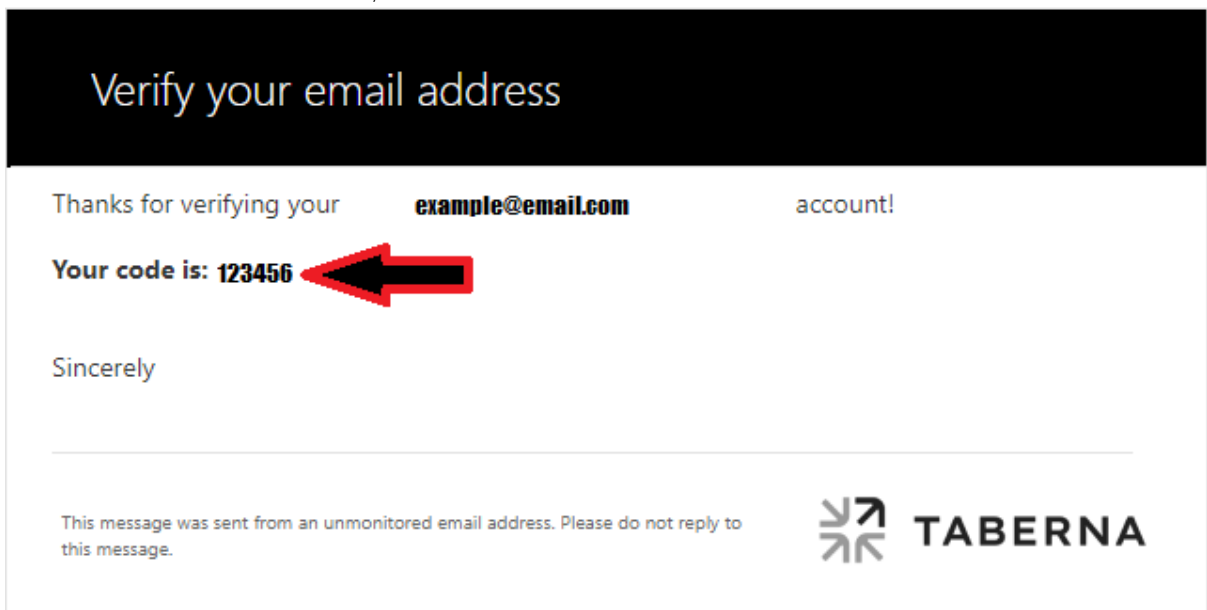
https://tabernatst.b2clogin.com/tabernatst.onmicrosoft.com/B2C_1A_APP/api/CombinedSignInAndSignUp/unified?local=signup&csrf_token=MEJIMHFjd2pVd0o3ZWRRQUo0c3JycWNJSXhyNExvRzIzCtAxVjMvazh4ZHIQVnk5anJrU2hNcDlDV203aDdqB0IzRHpxcDlFS1NhaFpBOTBISGVLVWc9PTsyMDI0LTA3LTE3VDE0OjU0OjIzLjU4NzE1NzNaO1cwanh5a1d3aVNncnQ4TEo5QlprMkE9PTt7Ik9yY2hlc3RyYXRpb25TdGVwIjoxfQ==&tx=StateProperties=eyJUSUQiOiJmNzViY2UwNC1iMDUxLTQwYmMtODVmMi03MjAxMTI5MTI4NDIifQ&p=B2C_1A_APP



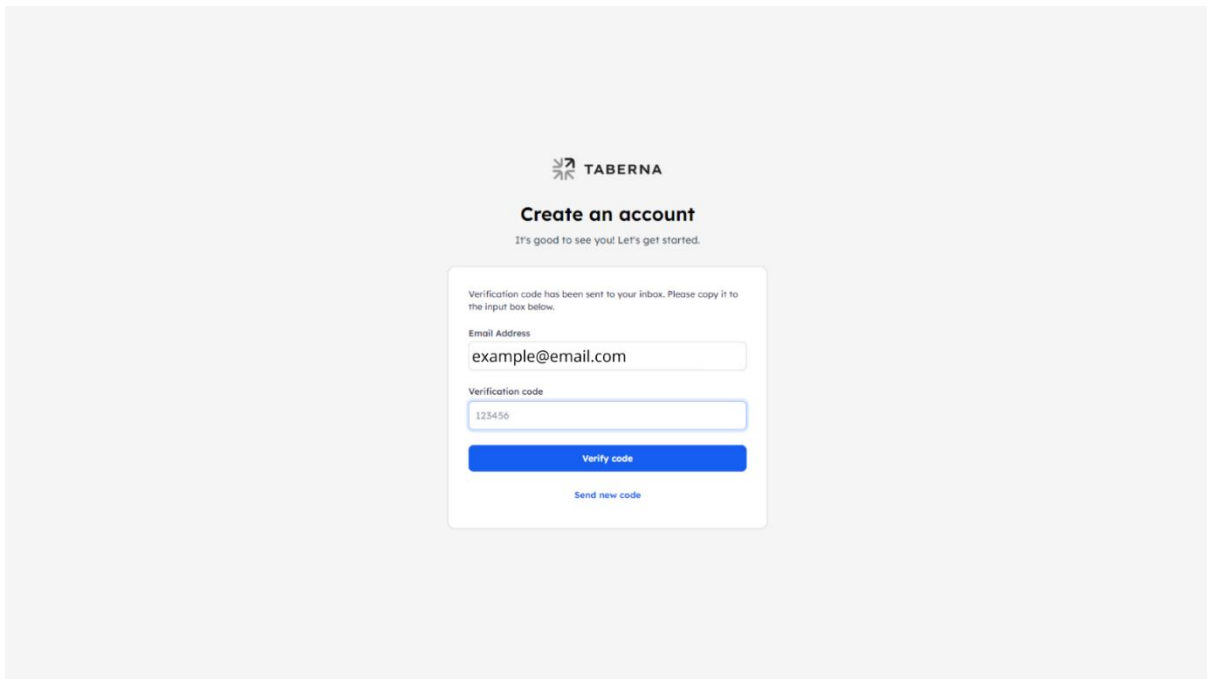
-Enter your E-mail address and send a verification code.



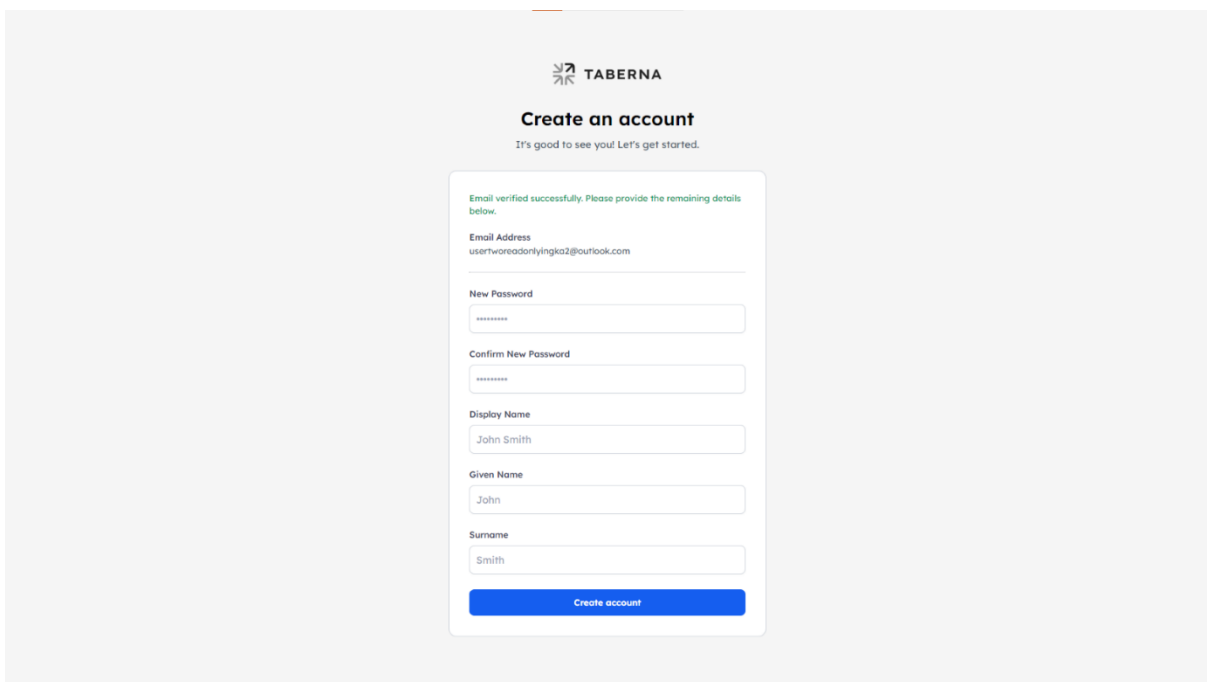
-Enter the verification code from your E-mail



-After providing your verification code, click "Verify code".



Enter your details and click on the "Create account" button to create your account.



B) Why Email and Password?

Using an email and password for the initial registration ensures a secure and straightforward setup process. This method provides a reliable way to verify your identity and recover your account if needed.

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C) Account Flexibility

After the initial setup, you can set up Single Sign-On (SSO) for easier and more secure access. However, note that the first account created in each tenant must always use an email and password for initial registration.

D) Tenant Creation Request

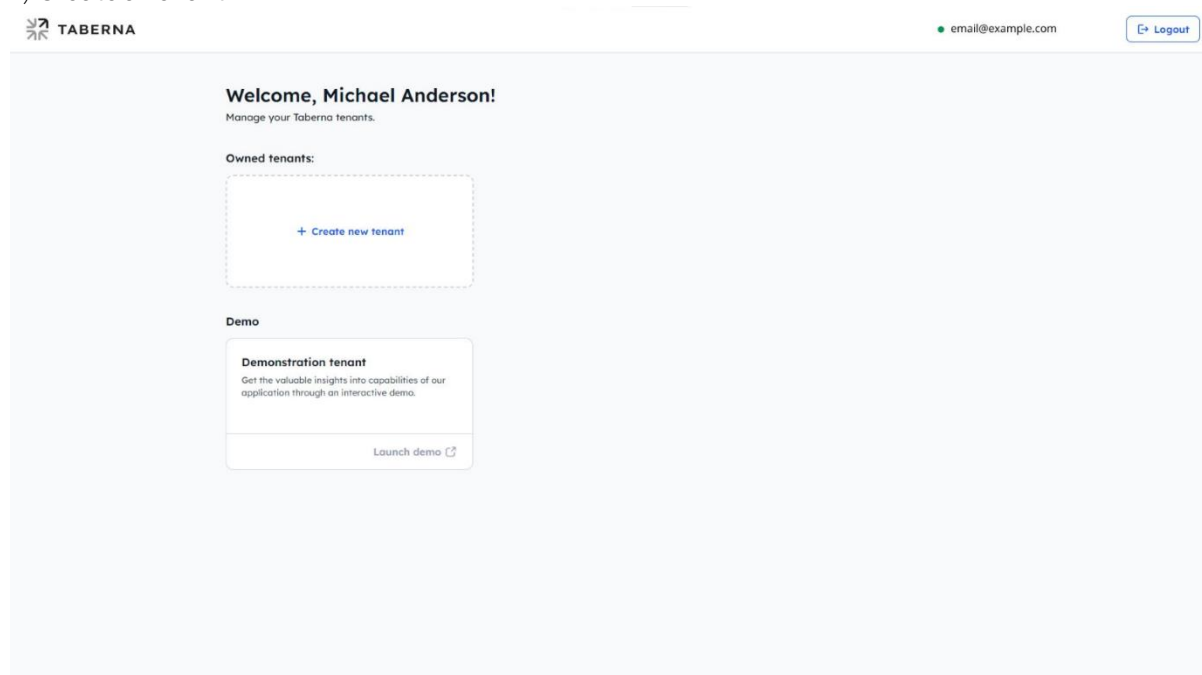
To create tenants, you must submit a request to the administration.
Your account must be approved by the administration before you can create tenants.

E) Tenant Limits

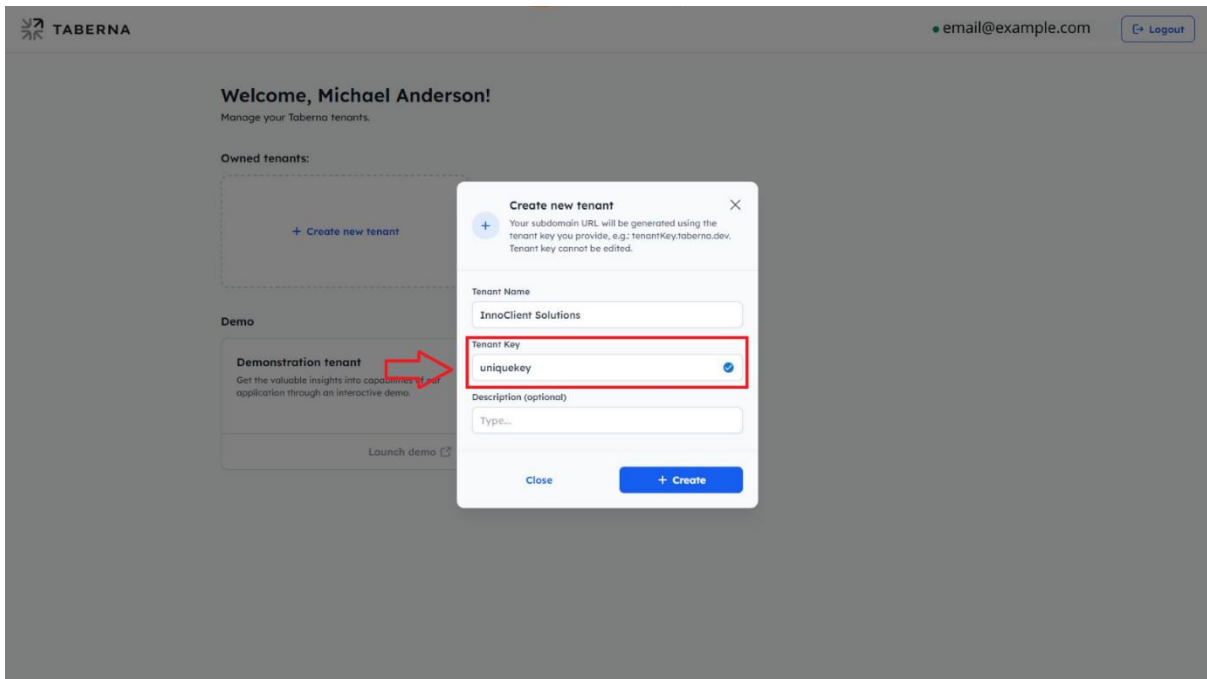
The default limit is one tenant per user. If you need more tenants, you can request an increase by emailing the administration.

By following these steps, you can quickly and securely set up your account and start using Taberna's features.

F) Create a Tenant:

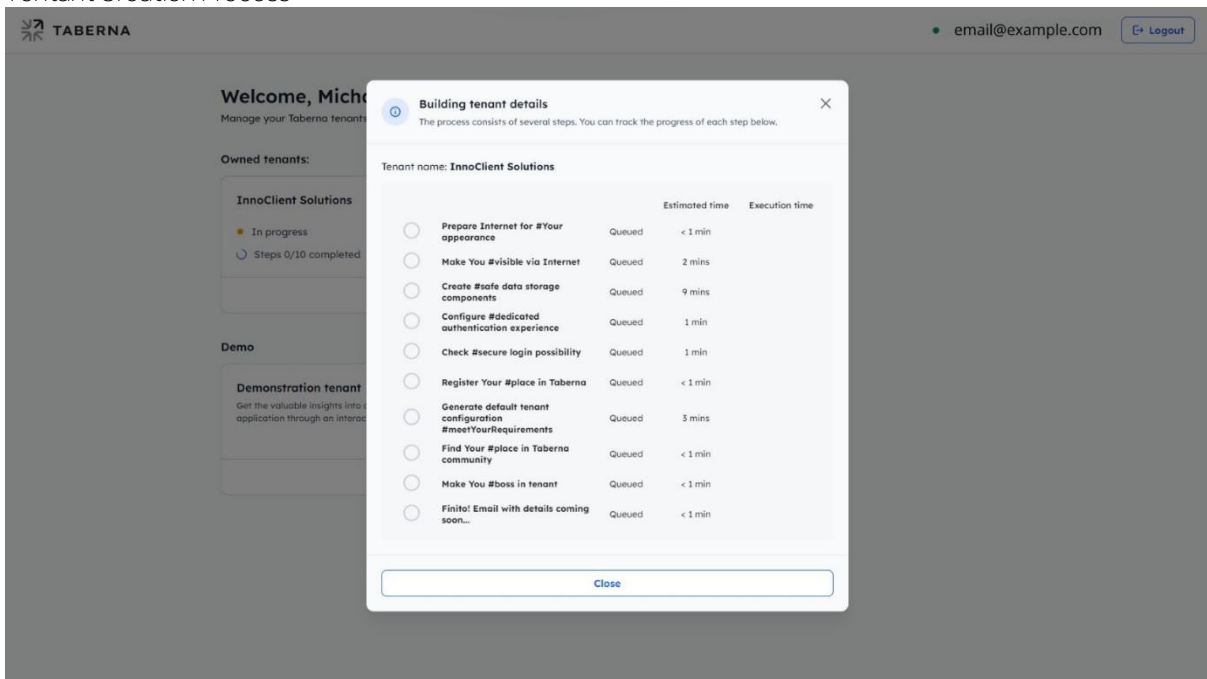


Set up a new tenant, ensuring the key is unique and appropriate as it becomes part of the URL.



After clicking "Create" button, you will see a provisioning progress window, that will show you how the tenant is being created:

Tenant Creation Process:



F) Accessing Tenant:

After creating a tenant in Taberna, you can easily access your dedicated space through the following steps:
Go to App:

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Once the tenant is created, click on the "Go to App" button.

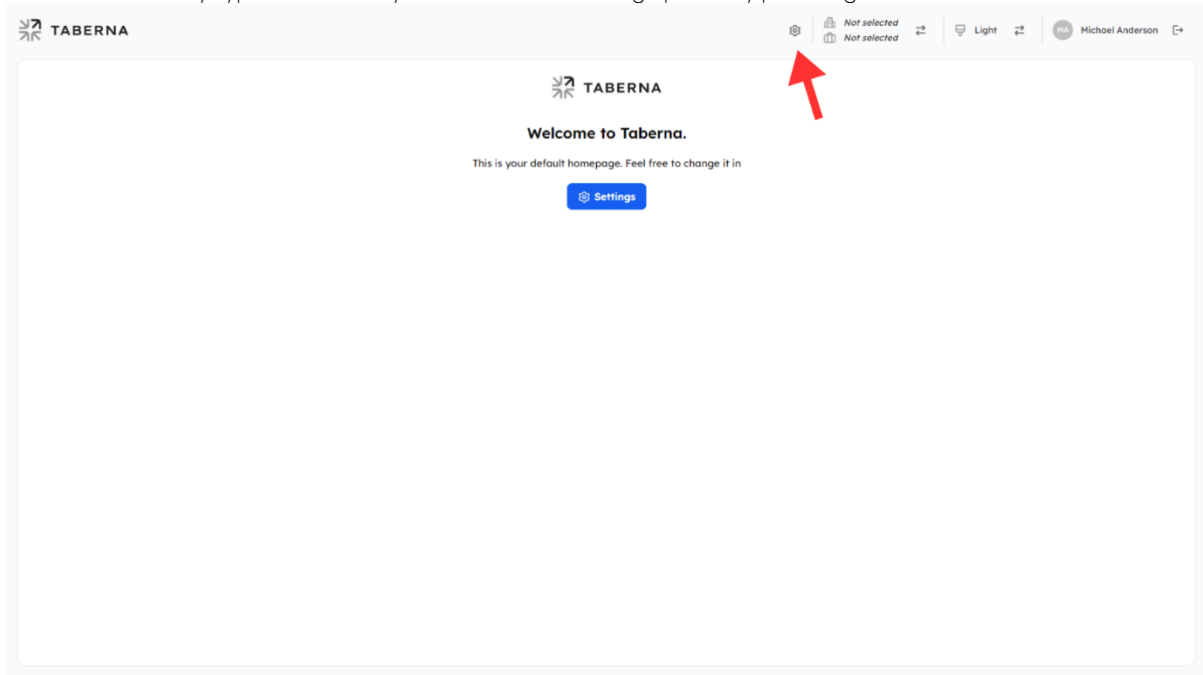
This will open your tenant space under its unique URL, which is a crucial aspect as it provides a dedicated and secure environment for your organization.

Unique URL:

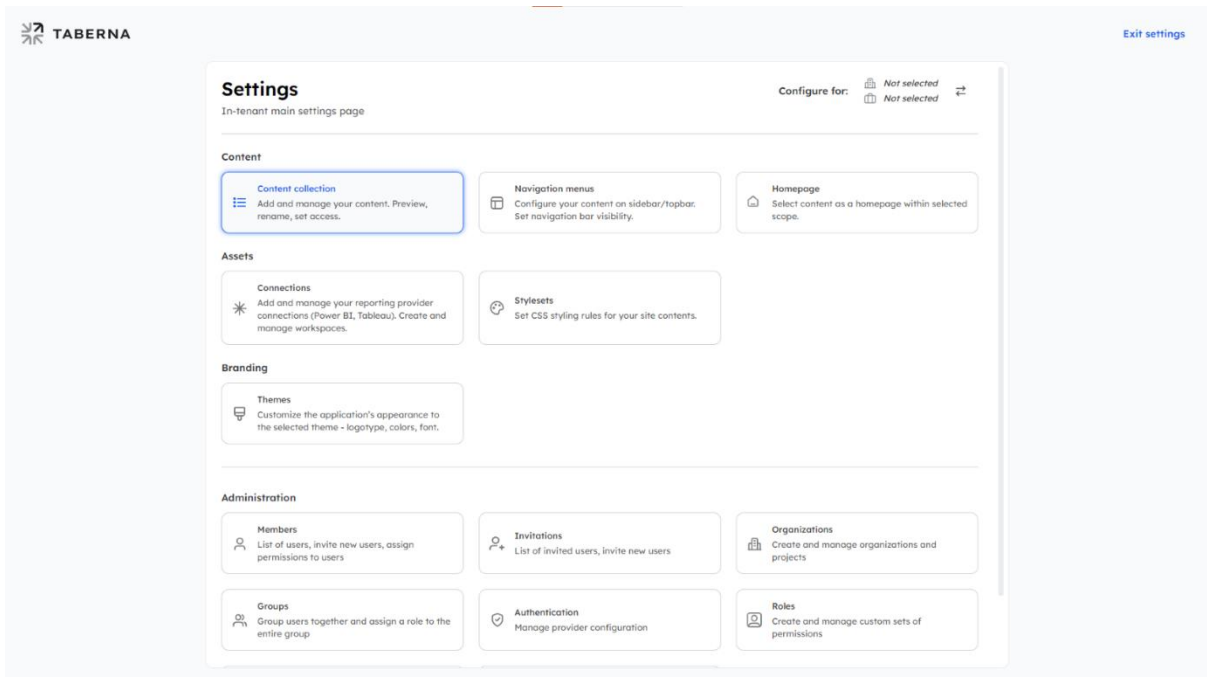
Each tenant has a unique URL, ensuring a personalized and isolated environment for managing your content and resources.

G) Add Content:

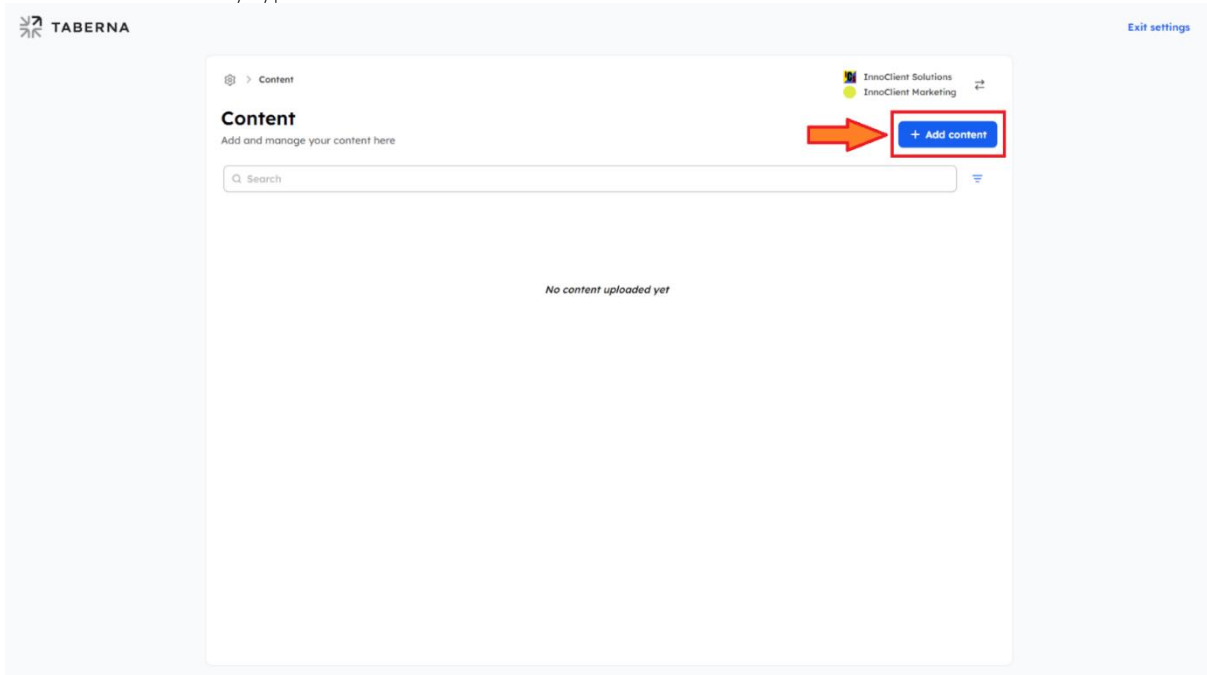
In order to add any type of content you must enter Settings panel by pressing this button:



-then, from Settings menu, you can access "Content collection" Tab to add content:



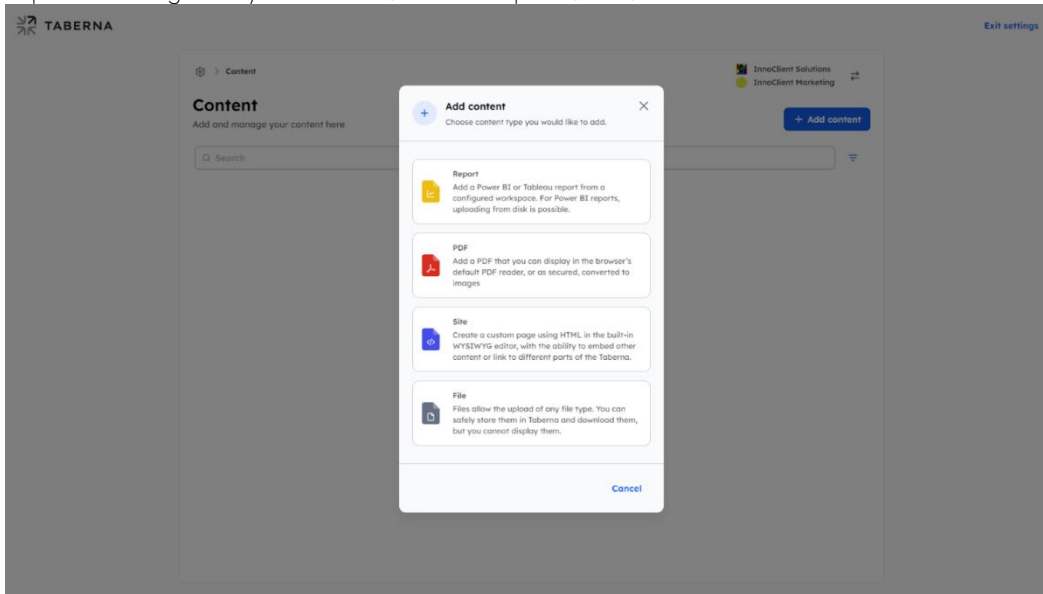
-From here to add any type of content, click " Add content" button.



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-Upload and organize your content, such as reports, files, and other relevant materials.

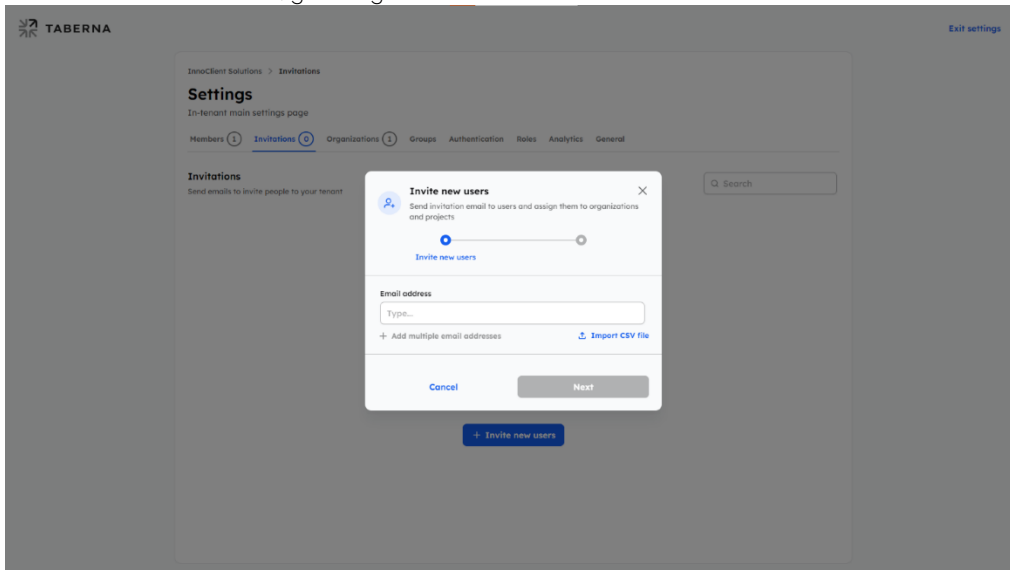


H) Set Access Permissions:

Define who can view, edit, or manage the content by assigning appropriate permissions to user

I) Invite Users:

Send invitations to users, granting them access to the tenant and its content based on their permissions



1) Assigning Memberships:

As part of the invitation process, you can assign users to specific groups within the tenant.

Groups: Define the primary structure for user organization, such as departments (e.g., Sales, Marketing).

Roles: Assign roles to groups, which define the permissions for users in those groups (e.g., Viewer, Editor, Manager).

Permissions: Roles are linked to specific permissions that control access to various resources and functions within Taberna.

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K) Monitor Usage:

Track how users interact with the content and the platform to ensure optimal engagement and identify areas for improvement.

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2.1 Tenant Panel

A) Dedicated Infrastructure for Data Storage

Tenants are isolated from each other, ensuring that no data can be shared between tenants. This isolation guarantees the security and privacy of each tenant's data. The platform ensures physical separation of data, meaning that data is stored in different physical locations.

This enhances security and privacy by preventing unauthorized access and ensuring that data from different tenants is never stored together.

B) Tenant Structure and Its Purpose

Each client typically operates within a single tenant, which can include multiple organizations and projects. This structure allows for efficient resource management and clear separation between different organizational units and their respective projects.

C) Why This Structure?

Efficient Resource Management: By organizing multiple organizations and projects under one tenant, clients can streamline their operations and manage resources more effectively.

Clear Separation: This structure ensures that each organizational unit and project remains distinct, preventing any overlap or confusion.

D) Example Use Case:

Imagine a large corporation using Taberna. The corporation would have a single tenant that represents the entire company. Within this tenant, there could be separate organizations for different departments, such as Marketing, Sales, and IT.

Each department can then manage its own projects independently.

This setup ensures that:

Marketing can focus on campaigns and market research without interfering with Sales.

Sales can track leads and manage customer relationships separately from IT.

IT can handle infrastructure projects and support tasks without impacting other departments.

By using this tenant structure, the corporation maintains organized, efficient, and secure operations across all its departments and projects.

This example illustrates the practical benefits of the tenant structure in Taberna, helping clients understand its purpose and how to leverage it effectively.

E) Tenant Limits and Flexibility

The platform imposes specific limits on the number of tenants that can be created to ensure optimal performance and efficient resource allocation. By controlling the number of tenants, we can maintain a high level of service quality and system stability.

F) Flexibility in Tenant Limits:

Default Limit: Each user is allowed a default number of tenants to start with.

Requesting Additional Tenants: If your needs exceed this default limit, you can request an increase by contacting the administration. Requests are reviewed on a case-by-case basis to ensure they align with platform capabilities and resource availability.

This approach ensures that all users benefit from a balanced and responsive system while providing the flexibility to accommodate growing needs.

F) Permissions for Creating New Tenants

Only users with the appropriate permissions can create new tenants. This control mechanism ensures that tenant creation is regulated and aligns with organizational policies.

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2.2 Creating a new Tenant

A) Key Validity and Uniqueness

The key is crucial as it forms part of the URL, specifically the unique subdomain, through which clients can access the space you have created for them. This key cannot be changed later and must be unique across the entire Taberna platform to ensure that each tenant's subdomain is distinct and easily accessible. Certain words or phrases may not be permissible in the key - due to restrictions on usage.

B) Creation Process:

Screen with Creation Steps: The tenant creation process involves a series of steps displayed on-screen, guiding users through setting up a new tenant. During this process, the platform creates dedicated, physical databases specifically for the client. This ensures that each tenant's data is securely isolated and managed independently, providing robust data integrity and privacy.

C) Average Wait Times:

Average Wait Times: The average time expected for each step during the creation process varies and is designed to ensure efficient setup while maintaining platform integrity.

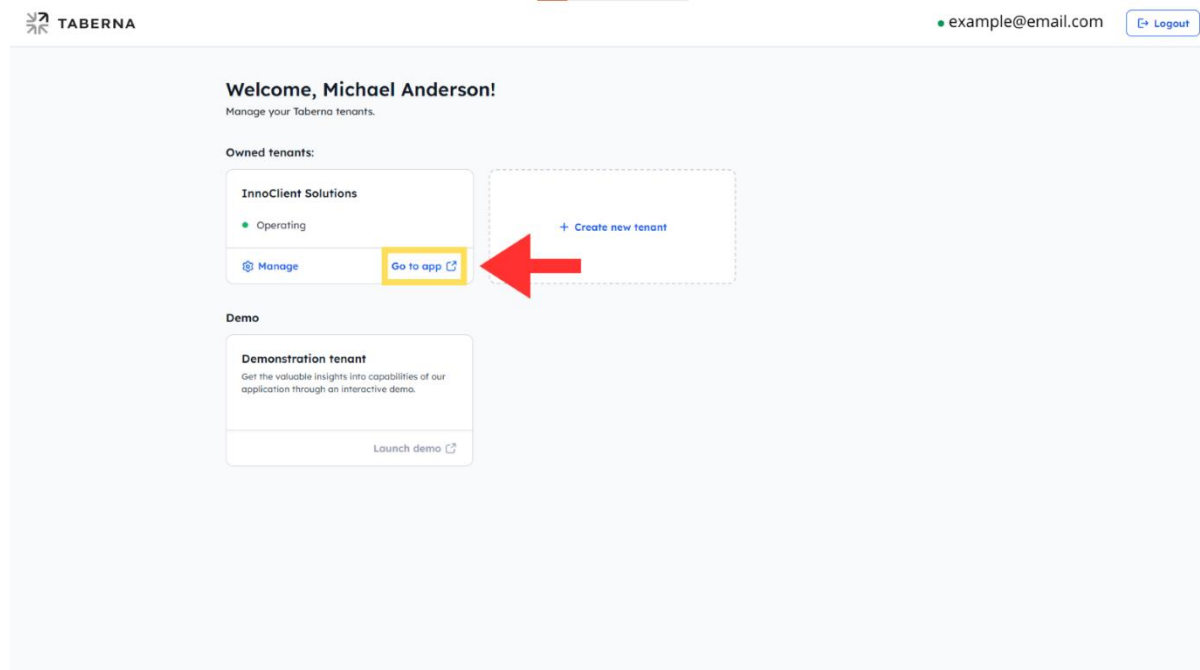
This ensures that the creation of a new tenant is straightforward, emphasizing key considerations such as uniqueness and procedural efficiency.

2.3 Accessing a Tenant

Accessing a tenant in Taberna can be done in two ways:

Through the Tenant Panel in the App:

Navigate to the tenant by accessing it through the app's Tenant Panel.



Using the Unique URL:

Access the tenant directly using its unique URL.

It is recommended to configure Single Sign-On (SSO) early on, if applicable, to avoid potential complications later. SSO enhances user experience and security by allowing seamless authentication across multiple applications without the need for separate login credentials.

2.4 Creating first content

In Taberna, "content" refers to various types of information and resources that can be managed and shared within the platform. These include:

Reports: Detailed documents summarizing data, analysis, and insights.

Sites: Web pages or intranet sites created for specific projects or departments.

Files: Any type of digital file, such as documents and images.

PDFs: Portable Document Format files for easy sharing and viewing.

The concept of content in Taberna has been introduced to unify the use and management of various types of information. Regardless of the type of content you add—be it reports, sites, files, or PDFs—Taberna ensures consistent handling and utilization across different functionalities.

Key Points:

Unified Content Usage:

All types of content can be integrated seamlessly within Taberna's environment.

Content can be added to menus, homepages, analytics dashboards, and more.

Flexibility:

Whether you upload a report, create a site, or add a file, you have the flexibility to use this content in various parts of the platform.

This unified approach simplifies content management and usage, allowing users to easily integrate content into different sections of Taberna without confusion.

Practical Applications:

For example, you can set a report as your homepage to provide instant access to key metrics.

Content can be included in navigation menus for easy access by users.

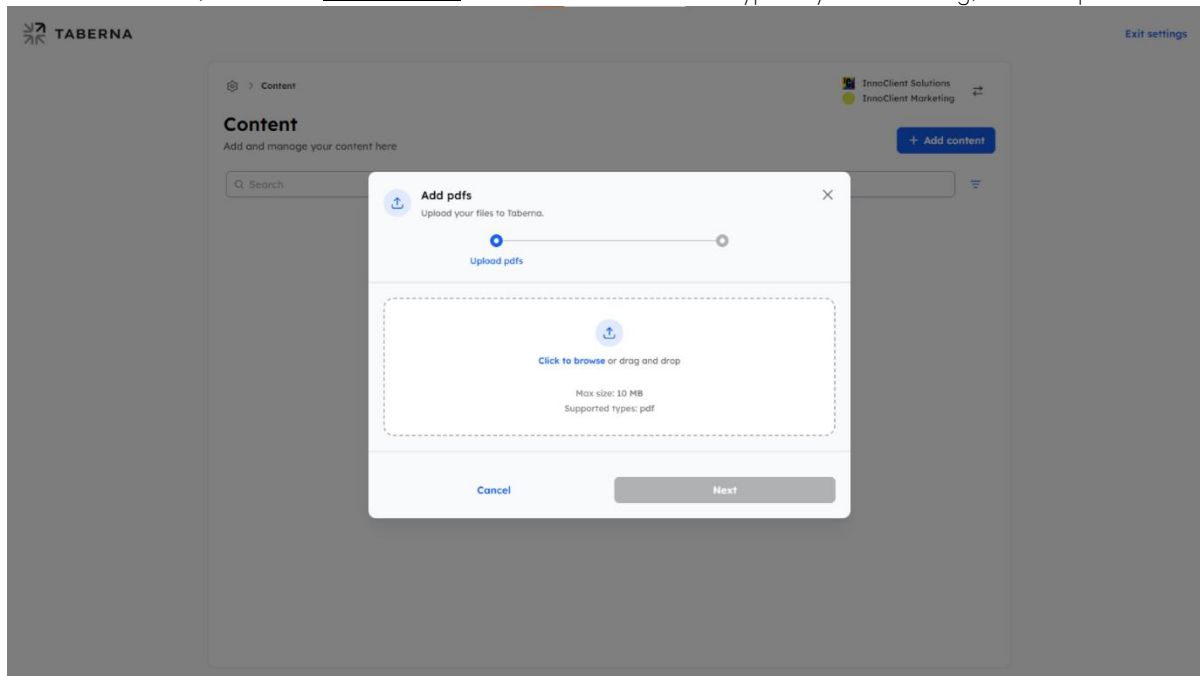
Analytics dashboards can incorporate various types of content to provide comprehensive insights.

By introducing this unified concept of content, Taberna streamlines the process of managing and utilizing information, enhancing the user experience and reducing common questions regarding the application of different content types. This approach ensures that users can make the most out of the platform's capabilities, integrating content efficiently and effectively into their workflows.

2.4.1 Creating first content

Now that we know the types of content that can be added, let's see how to do it:

From content tab, first click "Add content" and select the content type of your choosing, for example PDF



When adding files to Taberna, you have the option to configure how they are accessed and displayed.

Download Options:

Allow for Downloading:

Selecting this option will make the file downloadable for users.

This ensures that users can save a local copy of the file for offline access.

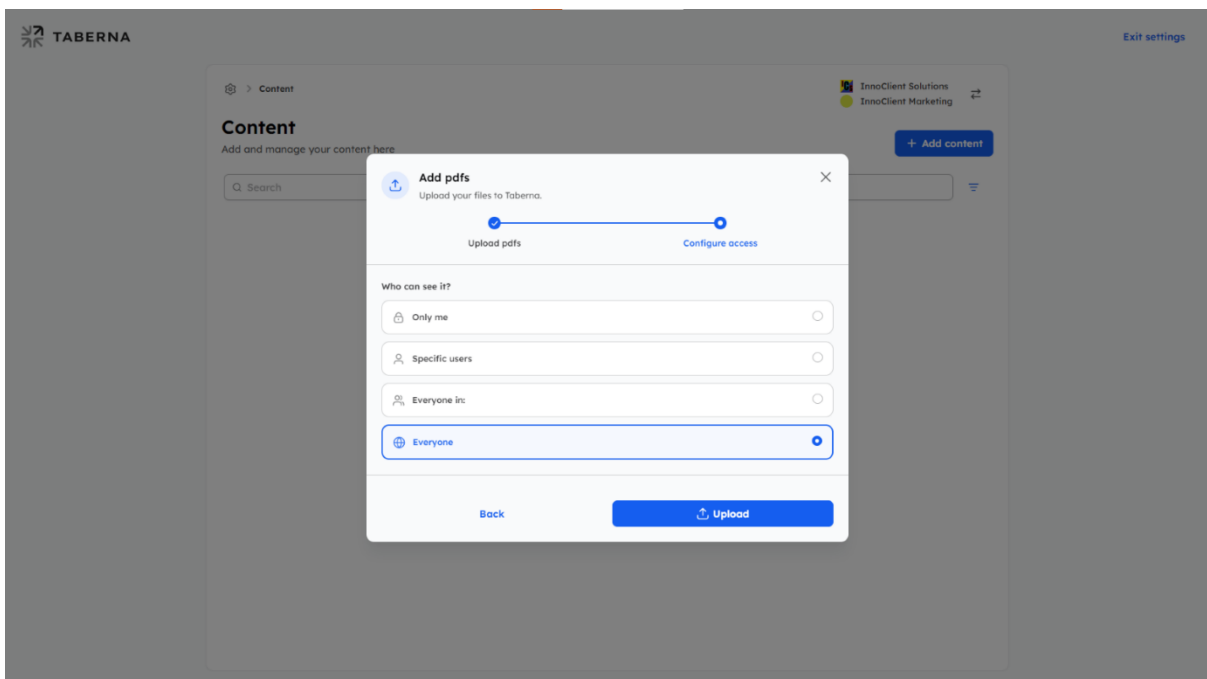
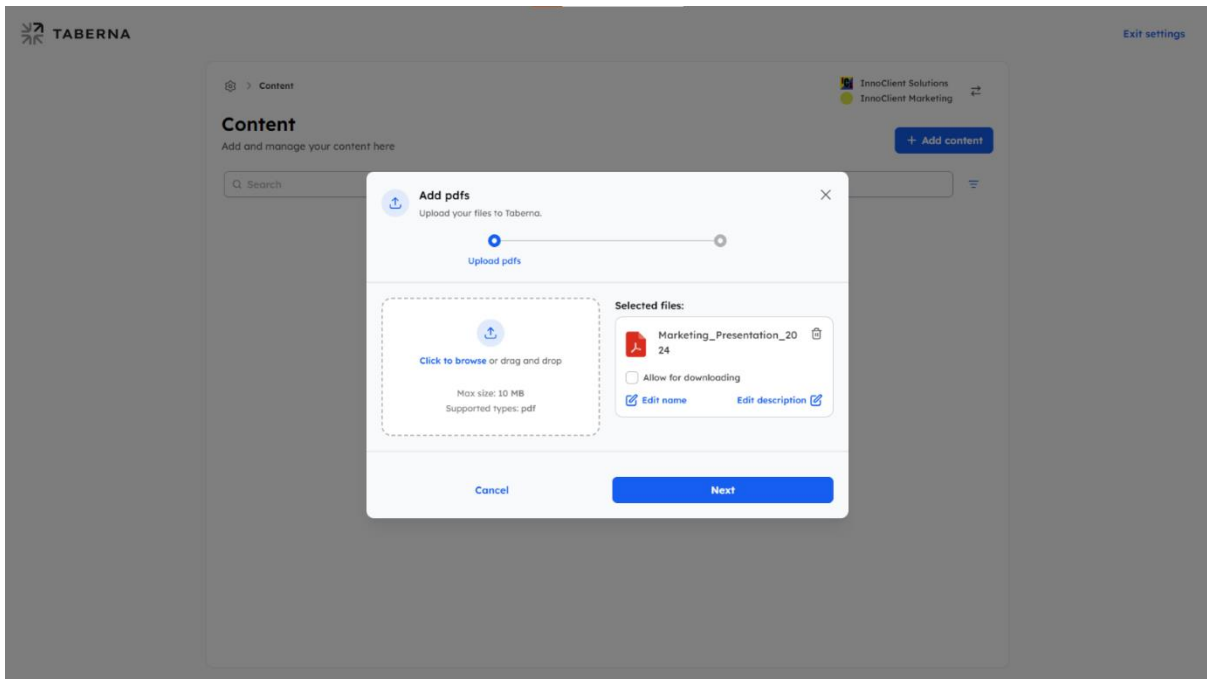
Display Methods:

If the file is not set to be downloadable, it will be displayed using the browser's native tools.

For files that cannot be rendered natively by the browser, Taberna will process them and display them as images.

- "Edit name" - selecting this option will let you edit the displayed name of a file.

- "Edit description" - selecting this option will let you edit the description of a file.



When you add a file to Taberna, the system registers your request and requires a few seconds to process the file. During this time, the content is temporarily added to the list in a "Processing" state. Once the system has completed processing the request, the record will unlock, allowing further operations on the file.

This ensures that the file is properly handled and displayed according to your configuration settings, whether it's set for downloading or viewing.

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2.4.2. Configure content access

When adding content in Taberna, you have four options for setting access permissions:

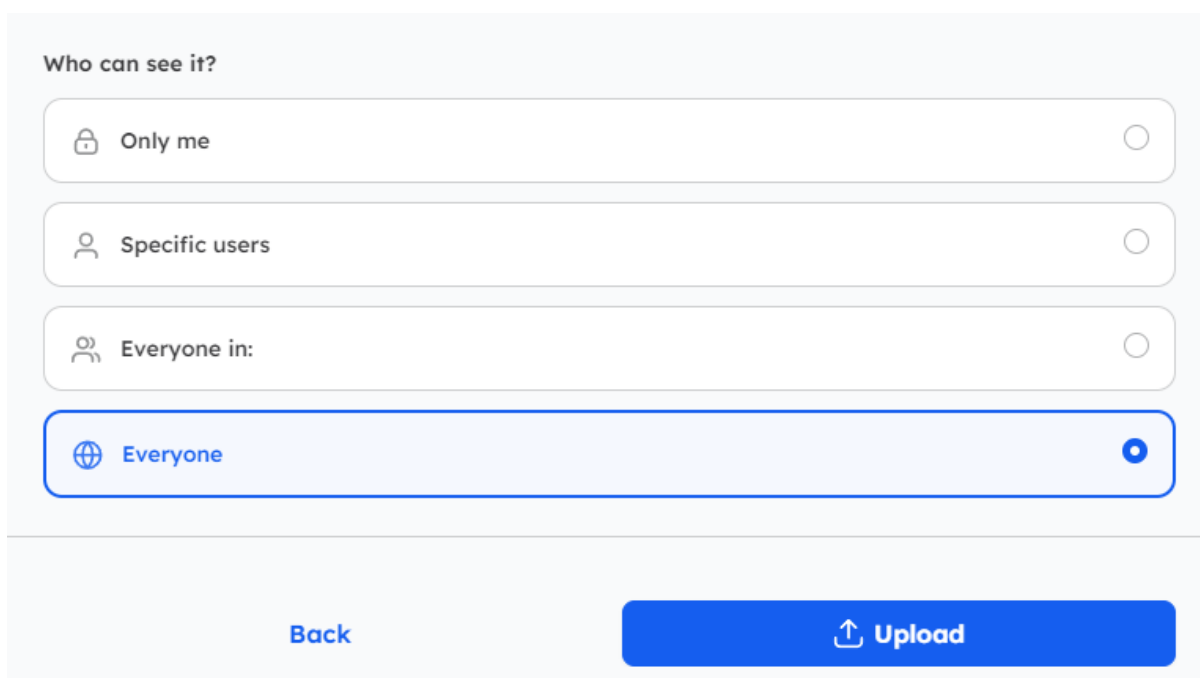
Only Me: The content is only accessible to you.

Specific Users: You can grant access to specific users by selecting their names, user will have access to the content regardless of that scope he is in.

Everyone in Organizations, Projects, Groups: All members within the specified organizations, projects, or groups can access the content.

Everyone: The content is accessible to all users within tenant.

These options allow you to control who can view and interact with your content, ensuring appropriate levels of access and security.



Who can see it?

Only me

Specific users

Everyone in:

Everyone

[Back](#) [Upload](#)

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2.5. Setting up basic navigation

To ensure easy access to the content you added, you can display it in the sidebar or top bar of your tenant's interface. [Navigation](#)

2.6. Analyzing traffic

Understanding user activity and behavior within Taberna is crucial for optimizing the platform's performance and improving user experience. Although this feature is currently a work in progress, the following sections provide an overview of the tools and methods that will be available for analyzing traffic:

Clarity:

User Insights: Clarity will be integrated to provide in-depth insights into how users interact with the platform. This includes heatmaps, session recordings, and user paths.

Behavior Analysis: Administrators can use Clarity to identify common user behaviors, detect usability issues, and gather data on user engagement.

Power BI Reports:

Comprehensive Reporting: Power BI reports will be used to create detailed analytics dashboards. These reports can provide visual representations of user activity, including page views, user sessions, and interaction times.

Customizable Metrics: Users will be able to customize their reports to focus on specific metrics relevant to their needs, such as user engagement per project or organization.

Access to Azure Storage Metrics:

Direct Access: Clients will have the option to access their metrics directly from Azure Storage. This ensures that clients can leverage their own tools and systems to analyze data.

Detailed Data: The stored metrics will include a wide range of data points, such as user login times, file access logs, and content interaction statistics.

Metrics Update Frequency:

Regular Updates: Metrics will be updated every 6 hours to ensure that the data remains current and useful for timely decision-making.

Consistent Monitoring: Regular updates allow for consistent monitoring of user activity and platform performance, enabling administrators to make informed adjustments as needed.