Step-by-Step Guide to Launching New Applications with DF Admin Portal

> In the steps that follow, you will discover how to use the admin portal to setup tenant, configure organizational structures, oversee users with varying roles, build business applications, and successfully initiate your applications.

Prerequisites for Setting Up Applications via the DF Admin Portal:

1. **Initiate the Subscription:**
    - Start by sending an email to df-info@ubtiinc.com. This email is the first step in gaining access to the DF Framework.
    - Choose Your Subscription: Decide on your preferred subscription option, which includes Free (Cloud), Standard (Cloud), or Isolated (Cloud). Make your choice before proceeding with the subscription.
    - User Limit: Be aware of the user limit that applies to the Free (Cloud) subscription, allowing up to 10 users with limited features for a 12-month duration.
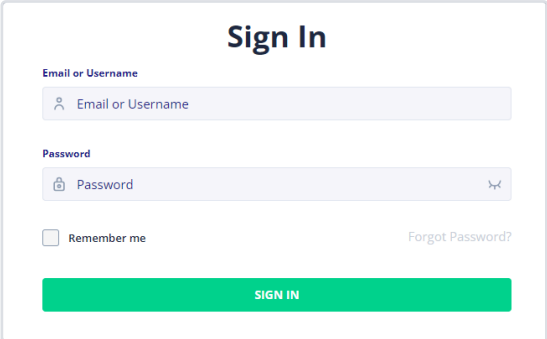2. **Confirmation Email:**
    - After initiating the subscription process, expect to receive an email confirmation from DF Framework. This email will contain your dedicated URL and Tenant admin credentials, which are required for accessing the DF admin portal.

Step-by-Step Guide

Step 1: Sign in to the admin portal using the Tenant admin user account.

1. Input your Email or Username into the first field.
2. Input your Password into the second field.

Note: If you're a first-time user, simply click on the link provided in the email from dfadmin to reset your password. After resetting, proceed to log in via the "Sign In" screen.

DF login screen

Step 2: Upon successful login, you'll be directed to the DF admin Landing page.
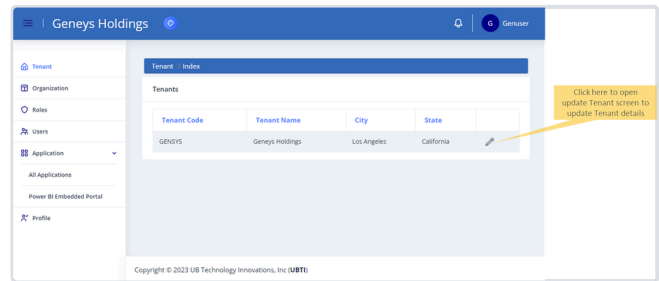
- **Manage Tenant:** Review/Update Tenant information.
- **Create or Manage Organizations**: Create one or more organizations in a hierarchical structure to manage users and applications effectively.
- **Create/Manage User** : Access the Create/Manage User screen to manage users with different roles, including Tenant Admin, Organization Admin, and User.
- **Manage Applications**: Create and mama your DF based business applications, application menus, and assign users at menu levels.
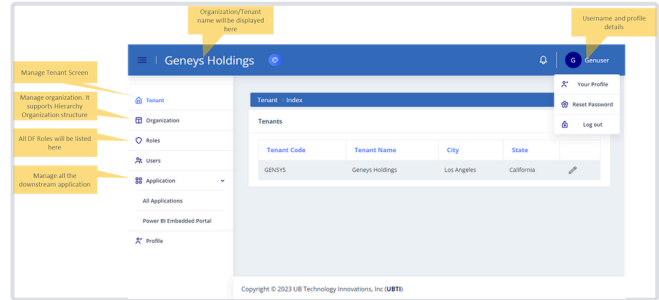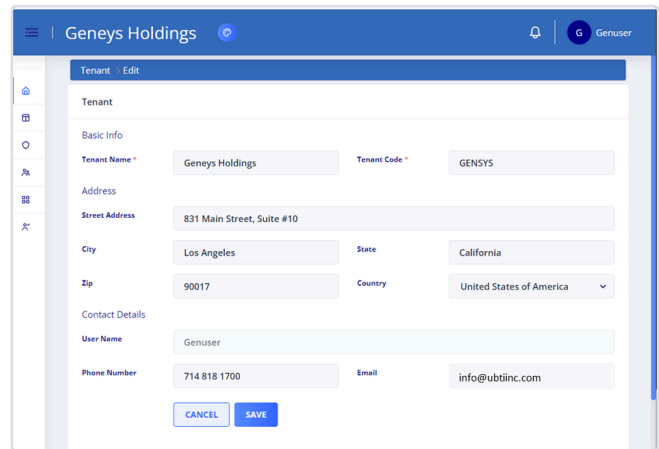

Step 3: Tenant Screen - Update Tenant Information.

To edit Tenant Information, click on the pencil icon and follow these steps:

- Tenant name: Enter the name of the Tenant.
- Tenant Code: Provide a unique code for the Tenant.
- Address: Input the Tenant's address.
- Tenant User Name: Set the admin Username used to log in as the Tenant admin.

Tenant Screen

Manage Tenant Screen

Step 4: Manage organizations. You can establish one or more organizations within a hierarchical structure to manage users and applications at the relevant levels.
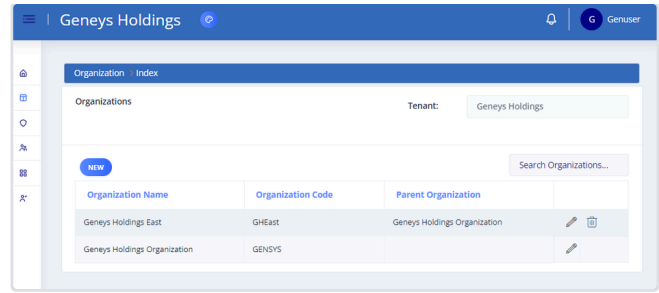
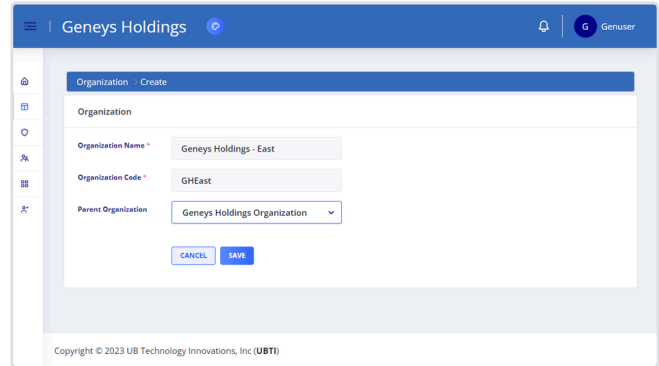To add or edit an organization, please follow these steps:

For Editing:

1. Click on the pencil icon.
2. Modify the Organization details as needed.

For Creating:

1. Click the "New" button.
2. Complete the following information:

- Organization name: Enter the name of the Organization.
- Organization Code: Provide a unique code for the Organization.
- Parent Organization: Assign the Parent Organization if applicable or leave it blank if the organization is a level 0 organization.

Organization List

Create/Edit Organization

Step 5: Access the Create/Manage User screen. This is where you can oversee users with varying roles, including Tenant Admin, Organization Admin, and User.
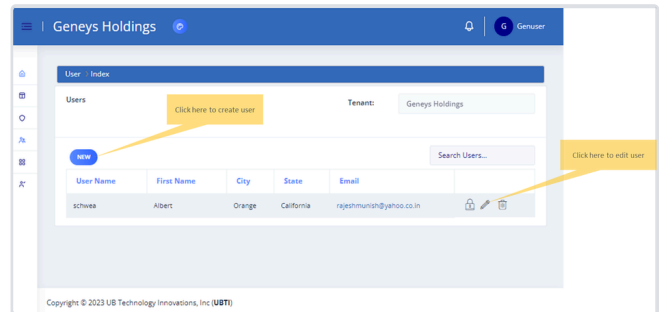
To add or edit a User, follow these steps:

For Editing:

1. Click on the pencil icon.
2. Modify the User details as needed.

For Creating:

1. Click the "New" button.
2. Fill out the following information:

- First name: Enter the User's First Name.
- Last name: Enter the User's Last Name.
- Middle name: Provide the User's Middle Name.
- Username: Specify the User's login username for DF.
- Address: Capture Personal and Work Addresses.
- Organization: Assign the User to an available organization.
- Role: Map the User to the appropriate role, such as Tenant Admin, Organization Admin, or Tenant User.

User List

Create/Modify user.

Step 6: Manage applications. Build your business applications, design menus, modules, and allocate users at the application/menu and Module levels as necessary.

To add or edit an application, follow these steps:

For Editing:

1. Click on the pencil icon.
2. Modify the application details as needed.

For Creating:

1. Click the "New" button.
2. Complete the primary application details as shown in "Screenshot: Manage Application - App wizard."
3. Create or edit application role(s) as shown in "Screenshot: Manage Application - App Role."
4. Create or edit application menu items as shown in "Screenshot: Manage Application - Menu setup."
5. Map users and application roles as indicated in "Screenshot: Manage Application - App Role/User."
6. Map application roles and menu items as shown in "Screenshot: Manage Application - App Role/Menu."

Application list

Screenshot: Manage Application - App wizard.

Screenshot: Manage Application - App Role

Screenshot: Add/Edit App Role

Screenshot: Manage Application - Menu setup.

Screenshot: Manage Application - App Role/User.
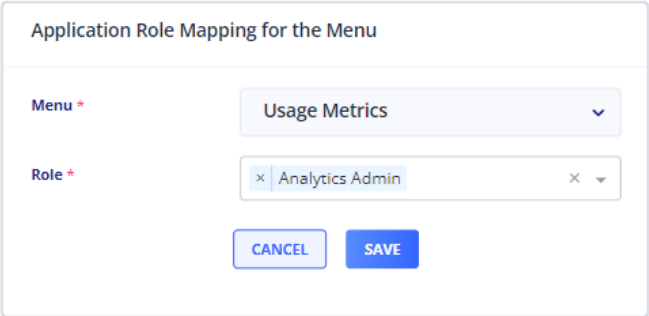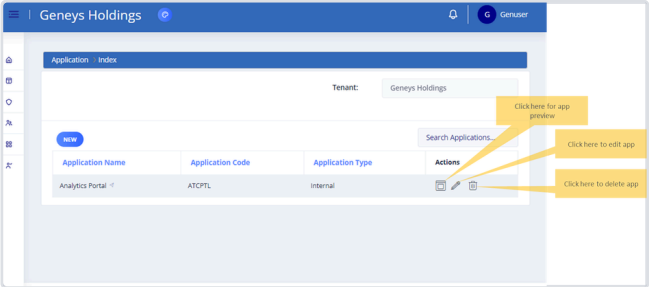

App Role and User assignment
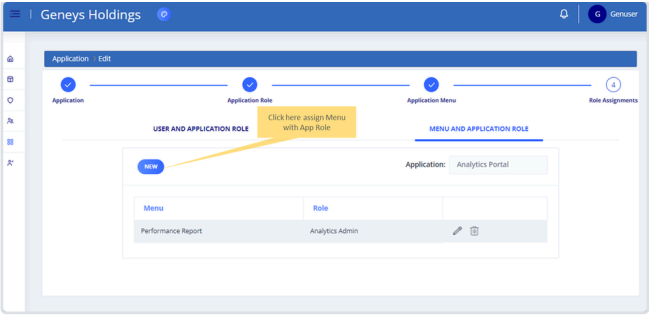
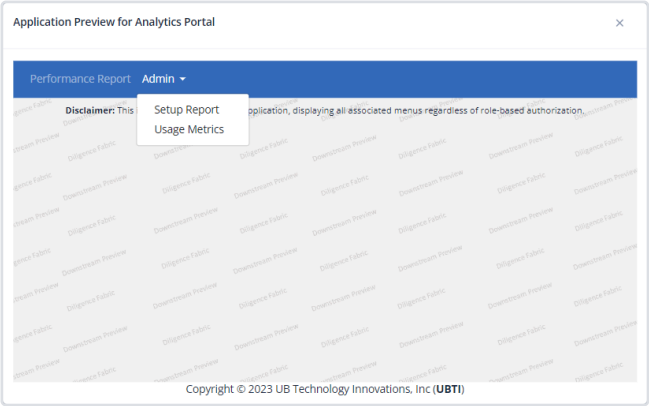Screenshot: Manage Application - App Role/Menu.

Menu and App Role mapping

Step 7: Application preview.

After completing your app setup, your new application will be listed in the application list. You can then click the "app preview" icon to preview your application with all your menu items.

Application List page

Application Preview

Step 8: Launch your application.

Here are the steps to launch your new application:

1. Clone the Svelte-based DF web template from GitHub.
   https://github.com/uiprojects/df-svelte-starter-kit/tree/main
   Connect your Github account

2. Open the Svelte-based DF web project/folder using Visual
   Studio Code

3. Update your configuration in .env file (create one if not already)
   with the following values:

```
1  DF_APP_ID = <application id>
2  DF_TENANT_ID = <Tenant Id>
3  DF_API_URL = <DF API base URL>
```
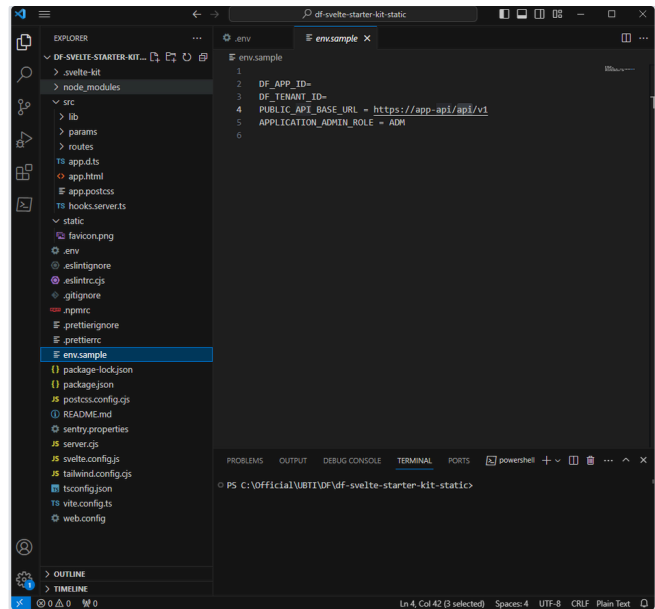
4. Follow the instructions from [https://github.com/uiprojects/df-s velte-starter-kit/blob/main/README.md](https://github.com/uiprojects/df-svelte-starter-kit/blob/main/README.md) Connect your Github account
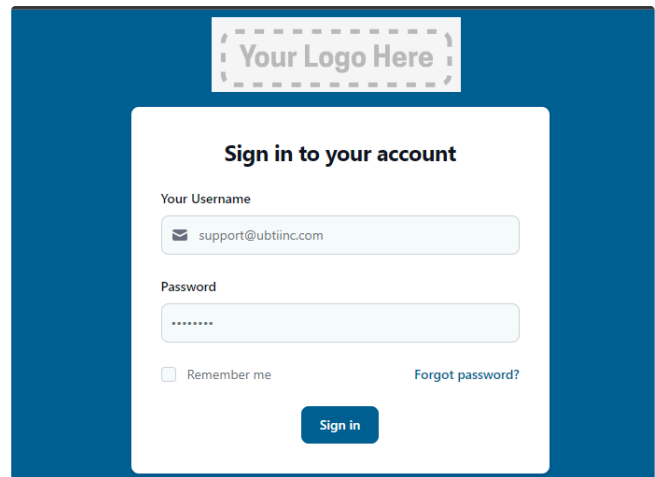
5. Launch your new application.

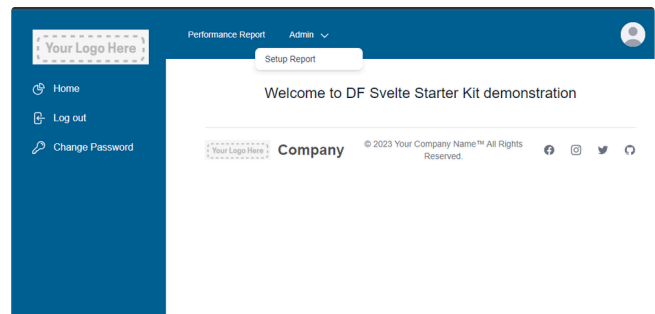6. Enter your application credentials to log in to the downstream application.

7. Upon successful login, the downstream application will be loaded with all the menu items.

DF Template Source - Visual Studio Code

Downstream Login page

Downstream Landing page