



CharterDesk Installation Guide

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Contents

- Contents 1
- 1 Knowledgebase Links 2
- 2 Let Get Started - Basics 3
- 3 Install the App in the Catalog..... 4
- 4 Add CharterDesk Webpart and Create Lists 6
 - 4.1 Add CharterDesk Web Part..... 6
 - 4.2 Create lists from property pane..... 10
- 5 Add CharterDesk Admin Web Part 12
 - 5.1 Add CharterDesk Admin Web Part in page..... 12
 - 5.2 Floor Management 15
 - 5.2.1 Add a New Floor..... 15
 - 5.2.2 Use existing Floor Plan..... 17
 - 5.2.3 Update existing Floor 18
 - 5.2.4 Delete a Floor..... 21
 - 5.3 Desks Management 22
 - 5.3.1 Create a Desk 22
 - 5.3.2 Edit a Desk..... 24
 - 5.3.3 Delete a Desk 26
- 6 Admin Portal 28
 - 6.1 Basics Tab..... 28
 - 6.2 Admin Tab 29
 - 6.3 Registered Floors Tab..... 31
 - 6.3.1 Upgrade from CharterDesk-Free to CharterDesk-Pro subscription..... 31
 - 6.3.2 Update floors for CharterDesk-Pro subscription 32
- 7 Useful Links 33

CharterDesk Installation Guide

This document outlines the required steps to install and configure the CharterDesk to your O365 tenant.

Firstly, thank you for downloading the installation guide. We are totally committed that you are totally satisfied with this product. If you have a question or query, please feel to call me.

Peter Ward

Peter Ward – 862 220 6080 | CTO- SoHo Dragon

1 Knowledgebase Links

Read these Knowledge links. This will help in your knowledge of how CharterDesk works

<https://charterdeskkbase.sohodragon.nyc/index.php/article-categories/installation/>

<https://charterdeskkbase.sohodragon.nyc/index.php/article-categories/faqs/>

<https://charterdeskkbase.sohodragon.nyc/index.php/knowledge-base/end-user-guide-to-charterdesk/>





CharterDesk Installation Guide

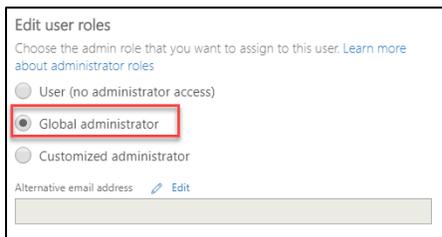
2 Let Get Started - Basics

1. Confirm that you have the right permissions to your O365 tenant. Go to your SharePoint admin center page <https://admin.microsoft.com>

To confirm this, sign in to <https://admin.microsoft.com> as a global or SharePoint admin. (If you see a message that you do not have permission to access the page, you do not have Office 365 administrator permissions in your organization). Please speak to IT.

This will need to be set.

YOU WILL NEED "GLOBAL ADMINISTRATOR" LEVEL PERMISSION TO ACCESS OR CREATE AN APP CATALOG SITE



Make sure that the user performing the installation has all the permission mentioned in the below article.

<https://charterdeskkbase.sohodragon.nyc/index.php/knowledge-base/correct-permissions-before-you-start-the-installation-to-the-tenant/>

1. Check the App Catalog exists in your tenant

Go to: https://<your-tenant>-admin.sharepoint.com/_layouts/15/online/TenantAdminApps.aspx

Follow the steps in this link to create an App Catalog: <https://www.youtube.com/watch?v=E5iNDJIFDlo>

Reference Link: - to create the App Catalog for your tenant.

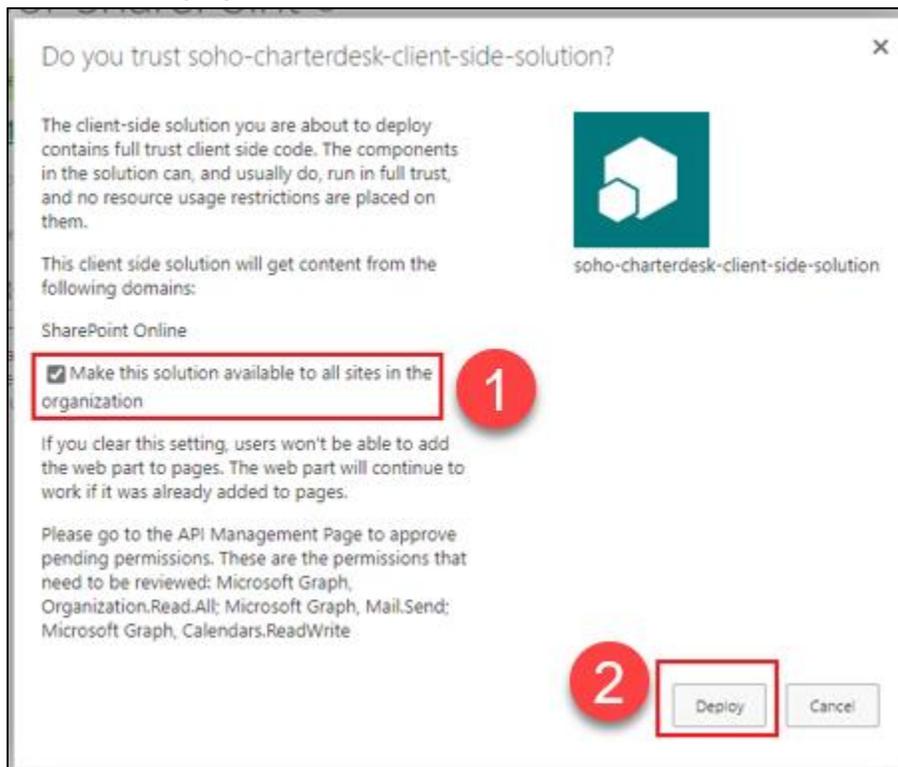
<https://docs.microsoft.com/en-us/sharepoint/use-app-catalog>

CharterDesk Installation Guide

3 Install the App in the Catalog

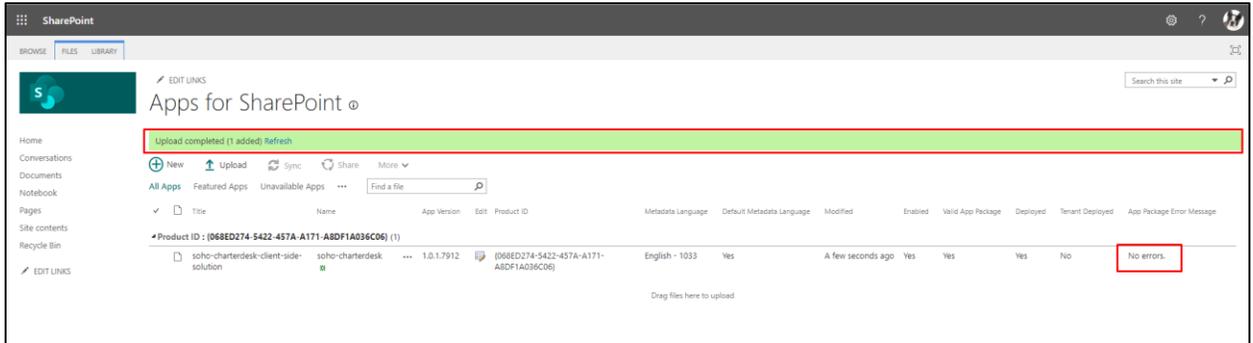
Follow the steps are outlined in this video: <https://www.youtube.com/watch?v=vIDvYiqVi4>

1. Download the [sppkg file](#) – The CharterDesk Application.
2. Go to the app catalog of your tenant.
i.e.: <https://<your-tenant>.sharepoint.com/sites/apps/AppCatalog/Forms/AllItems.aspx>
3. Upload the downloaded sppkg file to the catalog.
4. Once you upload, it will prompt for confirmation.
5. Check the make this solution available to all sites in the organization as below screenshot.
6. Click on the **Deploy** button.



CharterDesk Installation Guide

7. After successful deployment, you should see below screen.



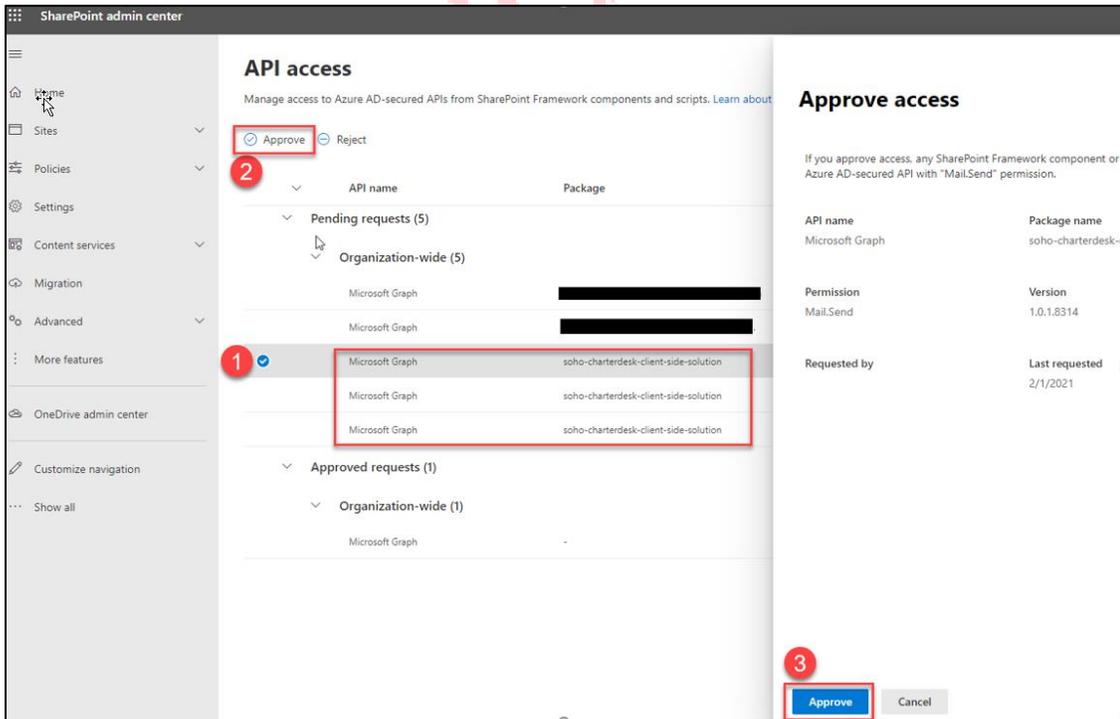
8. Once the app is deployed, we need to approve the API access requested for the Microsoft Graph.

9. Navigate to the link below. Replace <your_tenant_name> with your tenant name.

https://<your_tenant_name>-admin.sharepoint.com/_layouts/15/online/AdminHome.aspx#/webApiPermissionManagement

You will see the below requests.

10. Please select each request and click on the Approve button on the top. It will open a pane which specifies the details of the request. Click on Approve button at the bottom to approve the request.





CharterDesk Installation Guide

THE APP WILL NEED TO BE DEPLOYED IN THE CATALOG IN ALL TENANTS

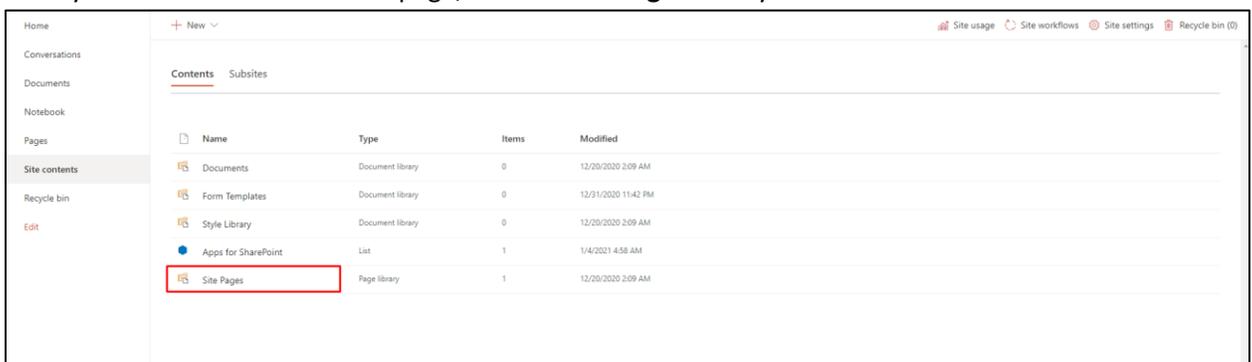
4 Add CharterDesk Webpart and Create Lists

These knowledge video outlines adding web parts, floors and creating desks:

<https://charterdeskkbase.sohodragon.nyc/index.php/knowledge-base/how-do-you-get-started-as-an-admin/>

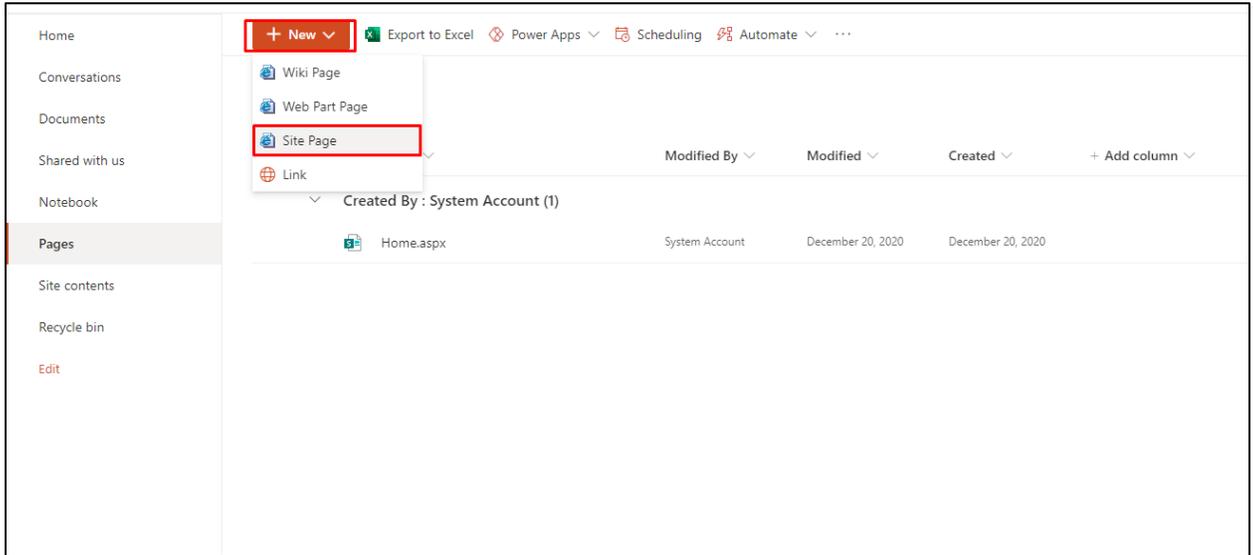
4.1 Add CharterDesk Web Part

1. Once the deployment is successful, navigate to the target site on which you want to add the webpart and go to site content. You can navigate there using below URL as well.
https://<your_tenantname>.sharepoint.com/sites/<site_name>/layouts/15/viewlsts.aspx
2. Once you are on the site content page, click on **Site Pages** library.

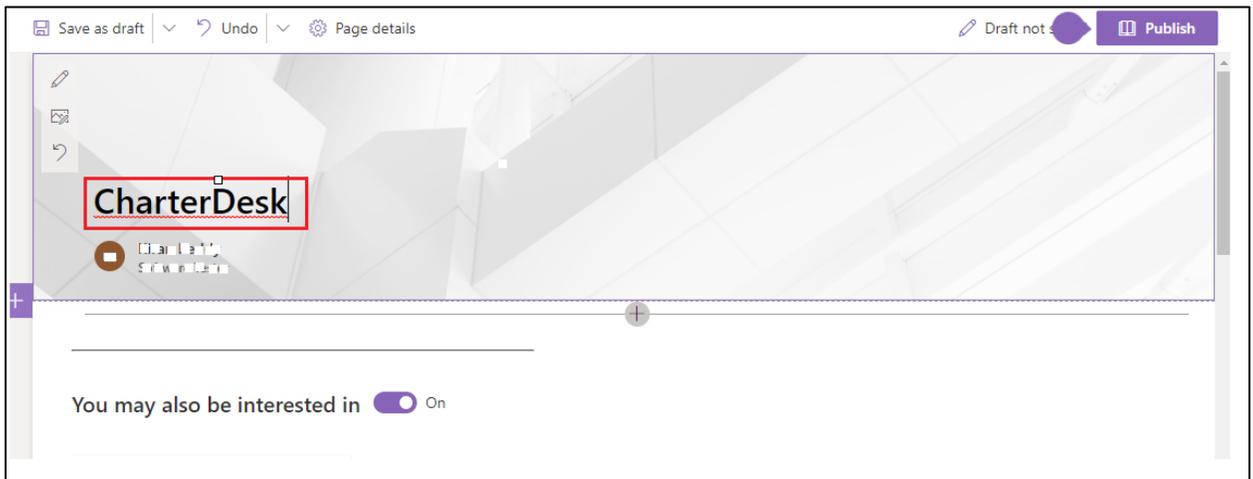


CharterDesk Installation Guide

3. Expand the New button by clicking on down chevron and click on **Site Page**.



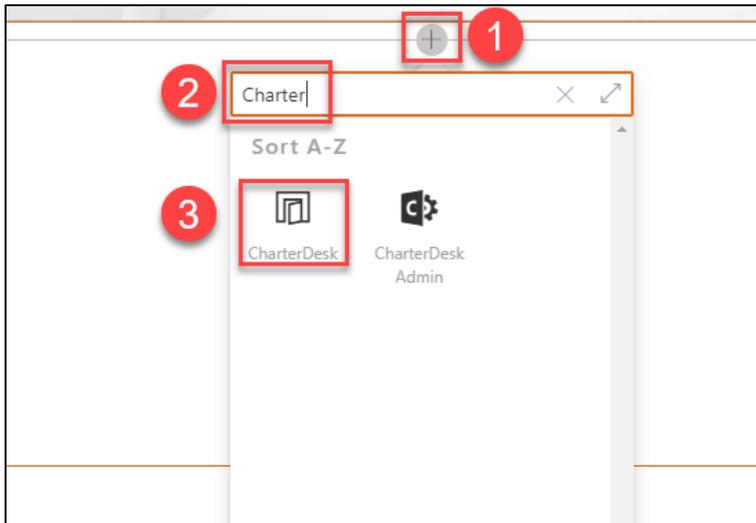
4. Enter the name of the Page as you want. We have given the name CharterDesk.



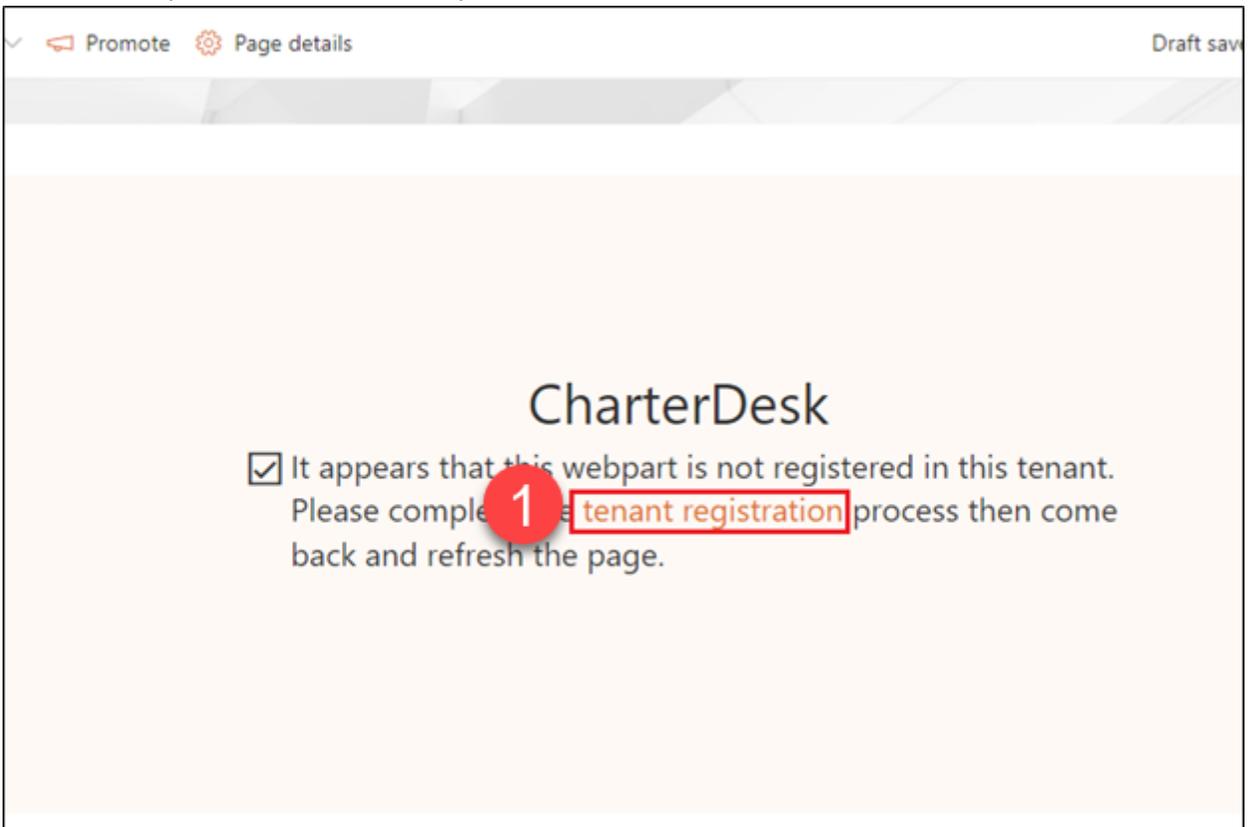
5. Click on the plus icon in the middle and search for Charter. You will see three web parts.

CharterDesk Installation Guide

6. Click on the CharterDesk. It will add the webpart as below.



7. Once the webpart is added successfully, it will look like below.



8. Click on the hyperlink **tenant registration** to open the registration page.
9. Enter the Recurly **subscription id**, **email address** which you received upon buying the subscription.

CharterDesk Installation Guide

10. Check the checkboxes after going through the **terms of policy use** and **privacy statement** hyperlinks.
11. Click on the **Verify** button to register your tenant.

CharterDesk - Verify Recurly Registration

Register your CharterDesk Subscription

*No **subscription ID**?* Visit [our site](#) and select "Try For Free" to register and obtain your trial subscription ID. Your subscription information will be emailed to you.

Recurly Subscription ID

1

Recurly Email Address used

2

3 I have read and fully understand the stated [Terms of Use Policy](#)

I have read and fully understand the stated [CharterDesk Application Privacy Statement](#)

4

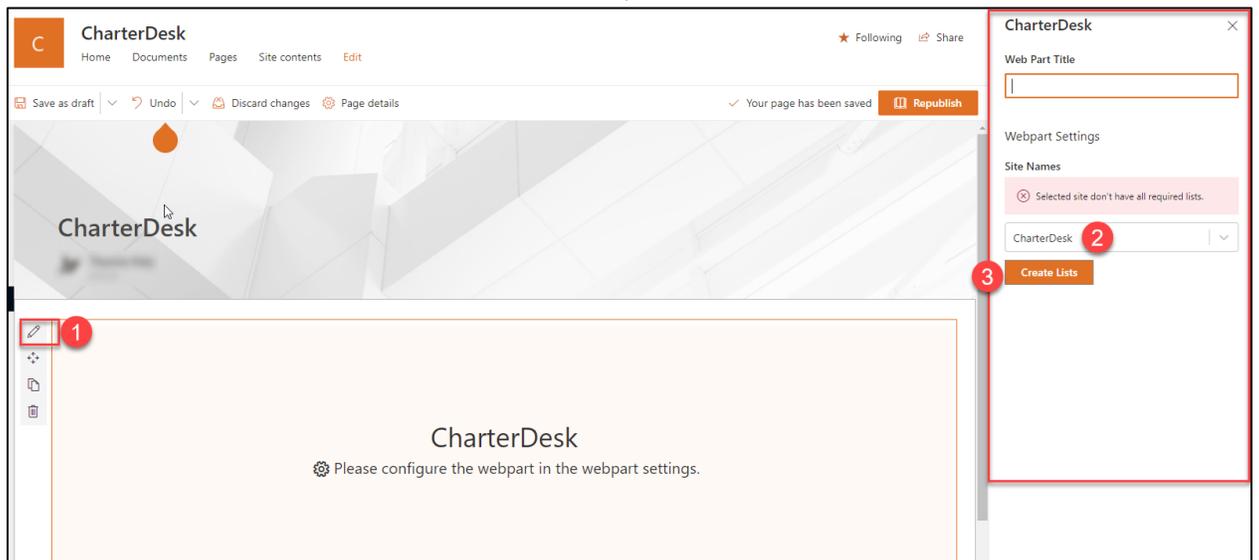
12. After successful registration, go back to your web part page and refresh it.

CharterDesk Installation Guide

4.2 Create lists from property pane

In CharterDesk, we have 2 web parts: CharterDesk, CharterDesk Admin. Users with enough permissions can create lists in any site from the property pane of these 2 web parts to save their data.

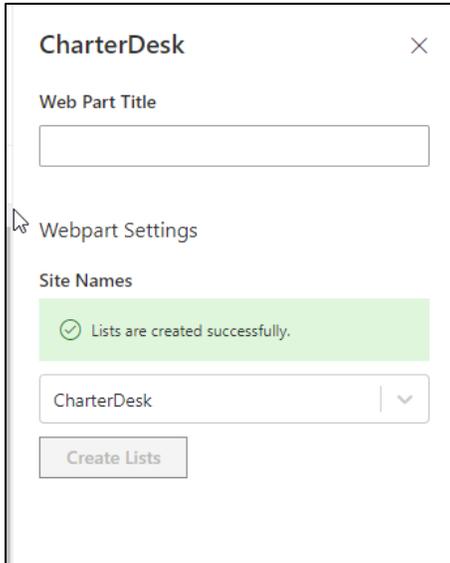
1. Open the web part page on which you have added the web part earlier.
2. Edit the page.
3. Click on the **Pencil** icon on the left and it will open the property pane.
4. In the Property Pane under Webpart Settings, select the site from **Site Names** in which you would like to create lists.
5. Click on the **Create Lists** button. It will create the required lists and libraries on that site.



Note: Newly created sites would usually take 15-20 minutes to populate in dropdown.

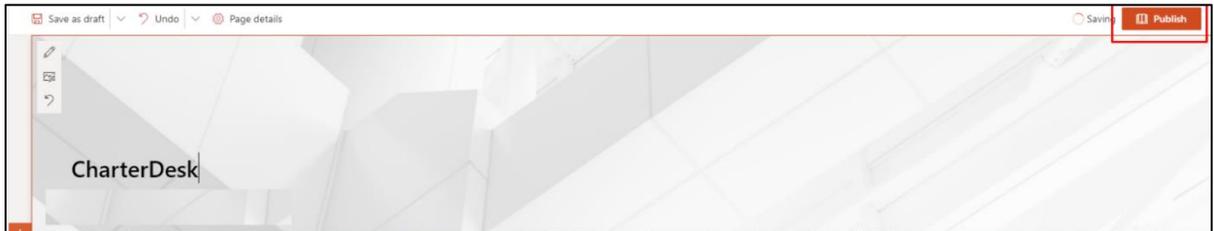
CharterDesk Installation Guide

6. Once the lists and library are created you will see the valid message in green box above the dropdown as below.



The screenshot shows a dialog box titled "CharterDesk" with a close button (X) in the top right corner. Below the title is a "Web Part Title" field with an empty text box. Underneath is the "Webpart Settings" section, which includes a "Site Names" label. A green message box with a checkmark icon contains the text "Lists are created successfully." Below this message is a dropdown menu currently displaying "CharterDesk" with a downward arrow. At the bottom of the dialog is a "Create Lists" button.

7. Click on Publish button. It will save the webpart and publish the page.



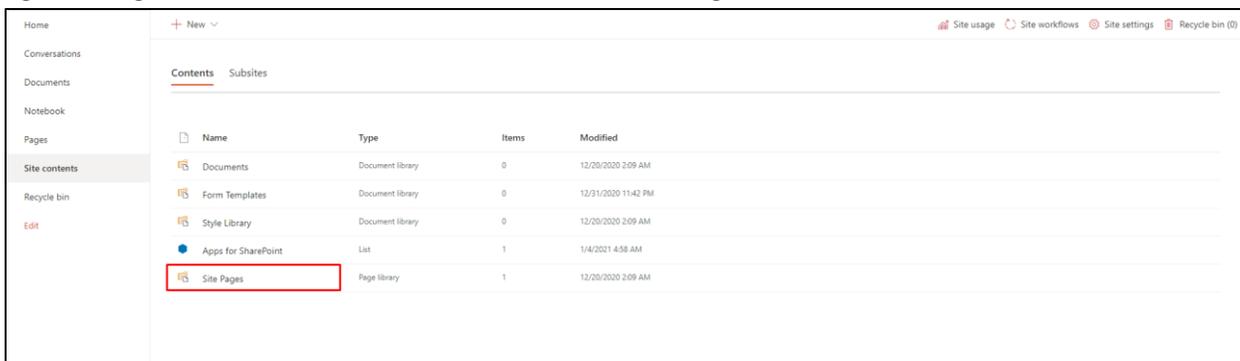
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5 Add CharterDesk Admin Web Part

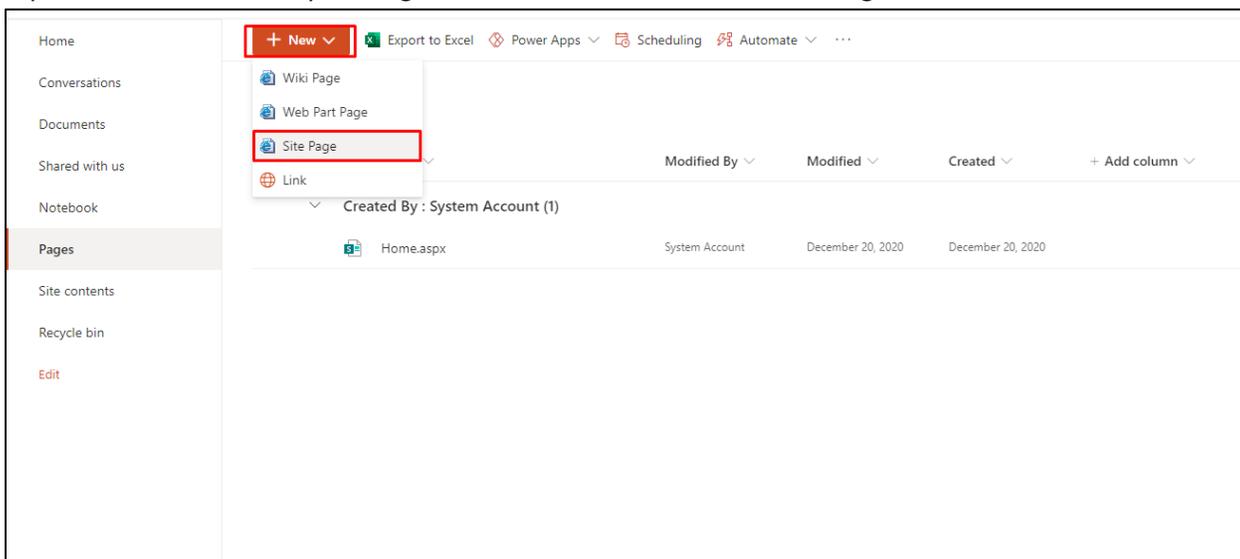
Users who are added as administrators for CharterDesk product can only access this web part.

5.1 Add CharterDesk Admin Web Part in page

1. Again, navigate to the Site Contents and Click on the Site Pages.



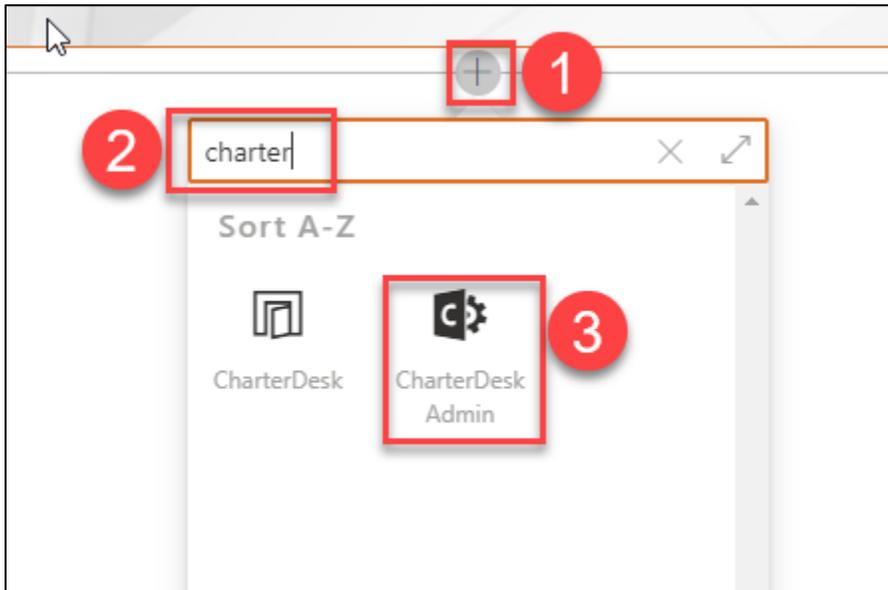
2. Expand the New button by clicking on down chevron and click on Site Page.



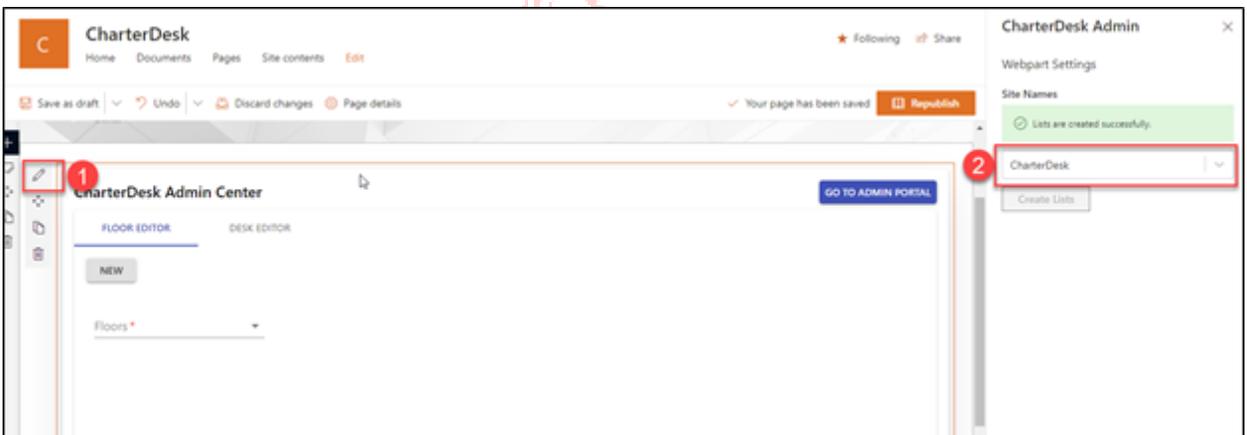
3. Enter the name of the Page as you want. We have given the name CharterDesk Admin.
4. Click on the plus icon in the middle and search for Charter. You will see three web parts.

CharterDesk Installation Guide

5. Click on the CharterDesk Admin webpart.



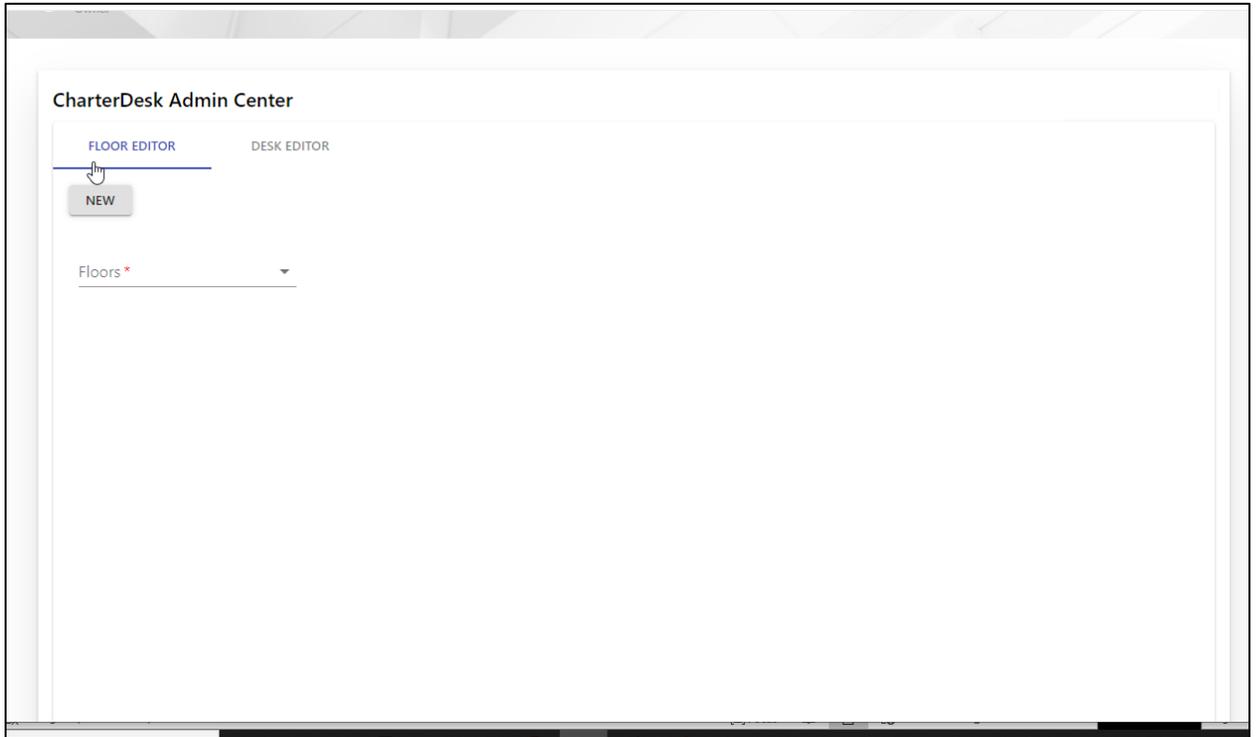
6. Click on the **Pencil** icon on the left and it will open the property pane.
7. In the Property Pane under Webpart Settings, select the site from **Site Names** to connect that site.



Note: User can create lists using button if selected site does not have required lists created.

CharterDesk Installation Guide

8. Once the webpart is added successfully, it will look like below. Click on Publish button and publish the page.



CharterDesk Installation Guide

5.2 Floor Management

5.2.1 Add a New Floor

1. Navigate to the page you created in the above steps.
2. To create the new floor, click on **New** button in **Floor Editor** tab.
3. Enter the **Floor Name**, click on Choose **Floor Plan** image or **upload the floor plan image** of your office.

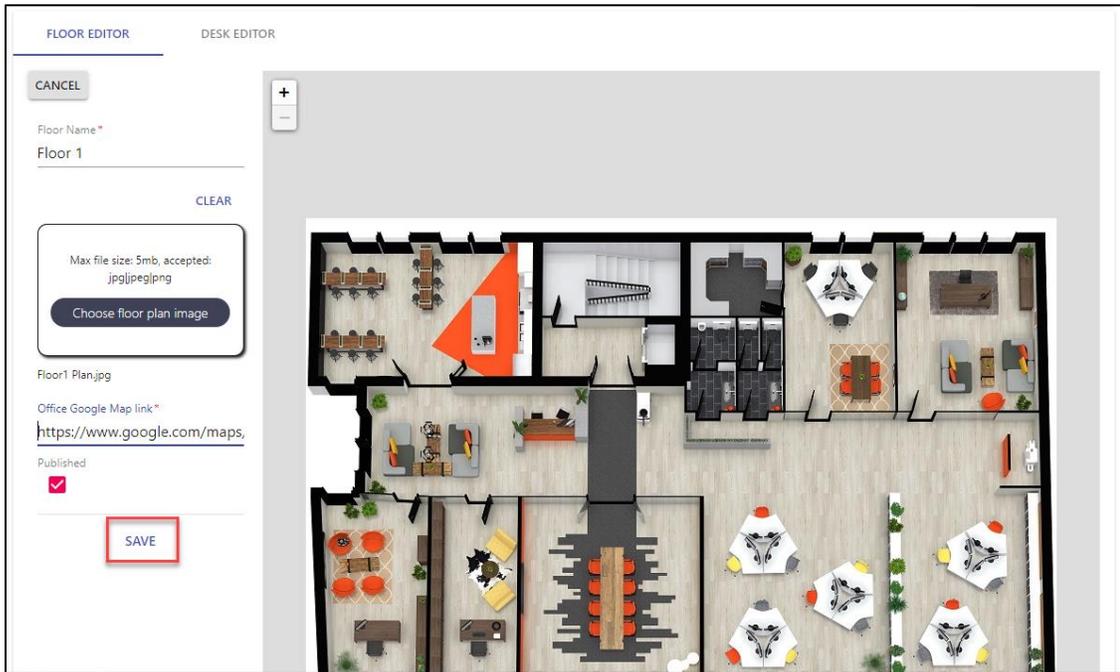
The screenshot shows the 'FLOOR EDITOR' form with the following fields and elements:

- FLOOR EDITOR** (tab) and **DESK EDITOR** (tab)
- CANCEL** button
- Floor Name *** text input field with a **1** callout and a **CLEAR** button below it.
- Floor Plan *** dropdown menu with a **2** callout and a **CLEAR** button below it.
- File upload area: **Max file size: 5mb, accepted: jpg|jpeg|png** and **Choose floor plan image** button.
- Office Google Map link *** text input field with a **3** callout.
- Published** checkbox with a **4** callout and a checked mark.
- SAVE** button at the bottom.

4. Once the floor plan is uploaded successfully, it will be displayed on the right side as below.
5. Enter the Office Google Map Link. Make sure you are entering a valid link otherwise it will not allow to create the office. Link should start with <https://> or <http://>.
6. Select the Published check box if you want to make this floor available for use to the end users.
 - a. If the Published check box is not checked then, the floor will not appear in the selection drop down while booking the desk.

CharterDesk Installation Guide

7. Once all the details are filled, the **SAVE** button will be enabled. Click on Save to create the floor.



CharterDesk Installation Guide

5.2.2 Use existing Floor Plan

1. If you want to select an existing floor plan for different floors, then you can easily do the same by choosing the already uploaded floor plans from the Floor Plan Dropdown.

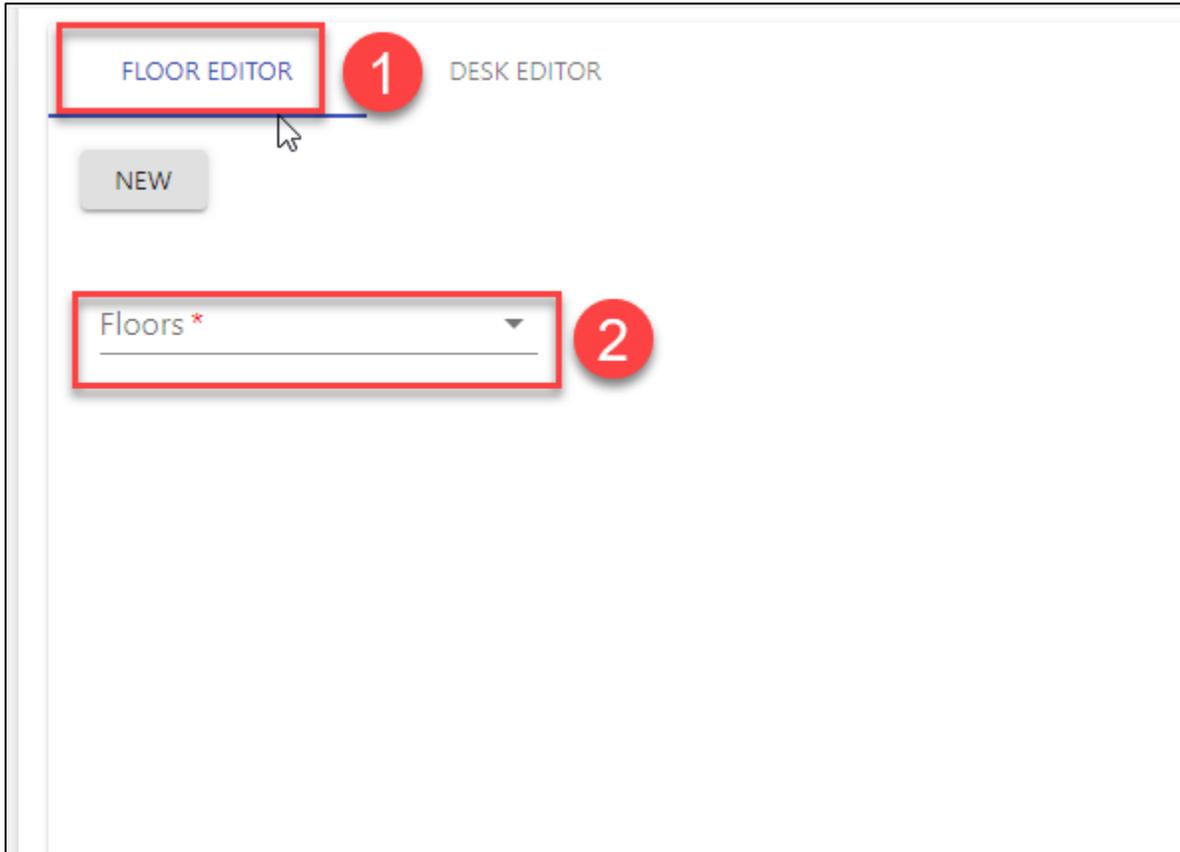
The image displays two side-by-side screenshots of the CharterDesk 'FLOOR EDITOR' interface, separated by a vertical red line. Both screenshots show the same form fields: 'Floor Name *', 'Floor Plan *', 'Office Google Map link *', and a 'Published' checkbox which is checked. There are also 'CANCEL' and 'SAVE' buttons, and a file upload section for the floor plan image.

In the left screenshot, the 'Floor Plan *' dropdown menu is highlighted with a red box, and a red circle with the number '1' is next to it. In the right screenshot, the dropdown menu is expanded, showing 'Floor 1' selected, which is also highlighted with a red box and a red circle with the number '2'.

CharterDesk Installation Guide

5.2.3 Update existing Floor

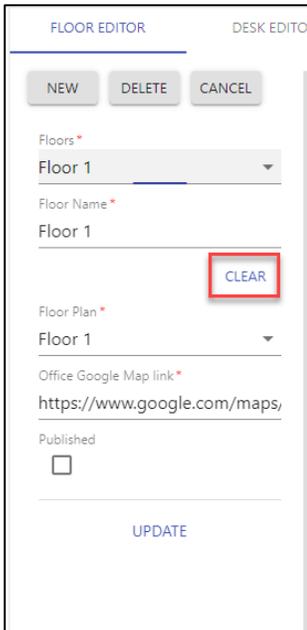
1. Navigate to the admin web part page in site.
2. In Floor Editor tab, Select the floor you want to edit from the **Floors** dropdown.



3. You can change the floor plan by either uploading a new floor plan or choosing from any of the existing floor plan from the **Floor Plan** dropdown.

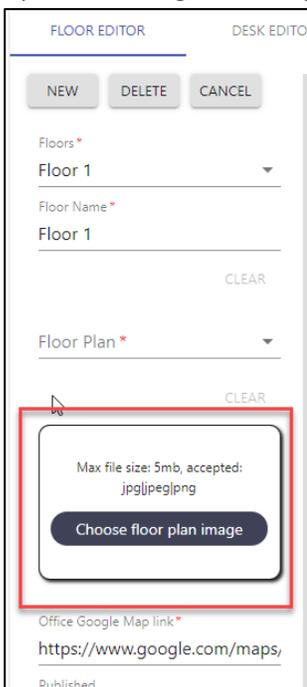
CharterDesk Installation Guide

- Click on **CLEAR** button to clear the selected floor plan in dropdown.



The screenshot shows the 'FLOOR EDITOR' form. At the top, there are buttons for 'NEW', 'DELETE', and 'CANCEL'. Below these are fields for 'Floors *' (set to 'Floor 1'), 'Floor Name *' (set to 'Floor 1'), and 'Floor Plan *' (set to 'Floor 1'). A red box highlights the 'CLEAR' button next to the 'Floor Plan *' dropdown. Below this is the 'Office Google Map link *' field with the URL 'https://www.google.com/maps,' and a 'Published' checkbox which is unchecked. At the bottom is an 'UPDATE' button.

- Upload an image of floor plan from using image upload control.

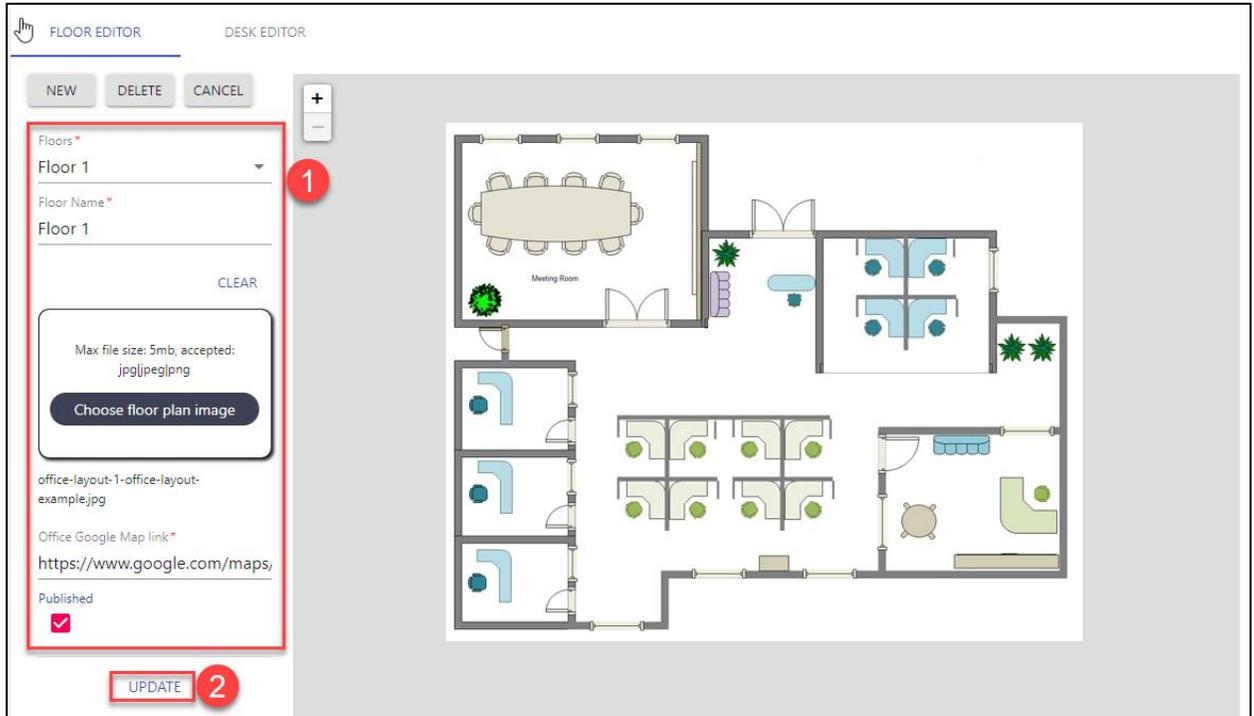


The screenshot shows the 'FLOOR EDITOR' form. The 'Floor Plan *' dropdown is now empty, and a 'CLEAR' button is visible next to it. Below the dropdown is an image upload control, which is highlighted with a red box. The upload control displays the text 'Max file size: 5mb, accepted: jpg|jpeg|png' and a 'Choose floor plan image' button. Below the upload control is the 'Office Google Map link *' field with the URL 'https://www.google.com/maps,' and a 'Published' checkbox which is unchecked.



CharterDesk Installation Guide

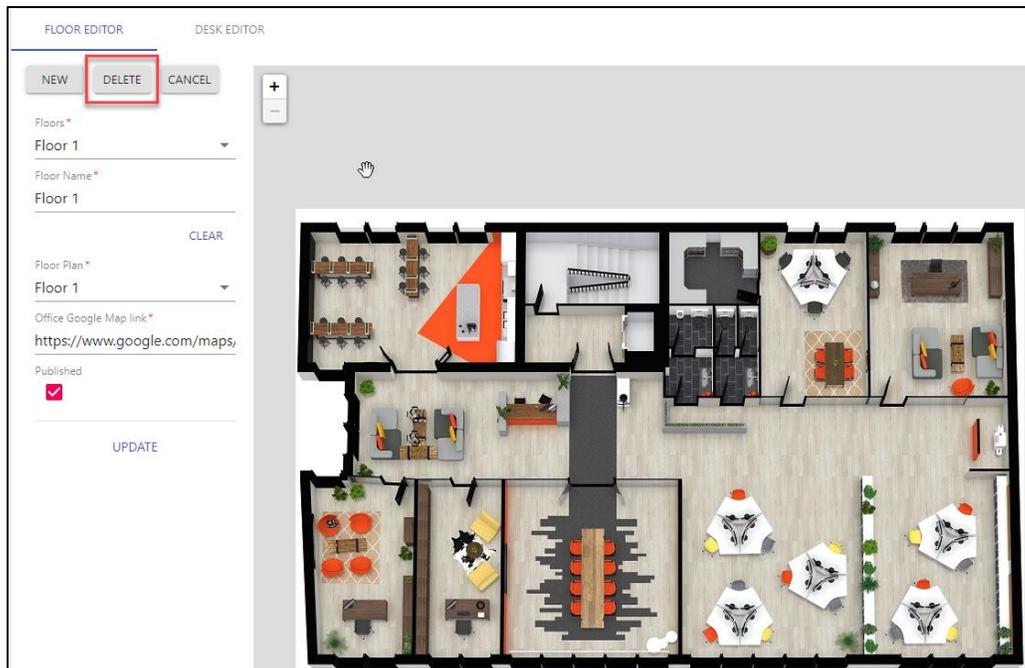
6. Once the changes you want to perform are done click on the **UPDATE** button. It will update the floor details.



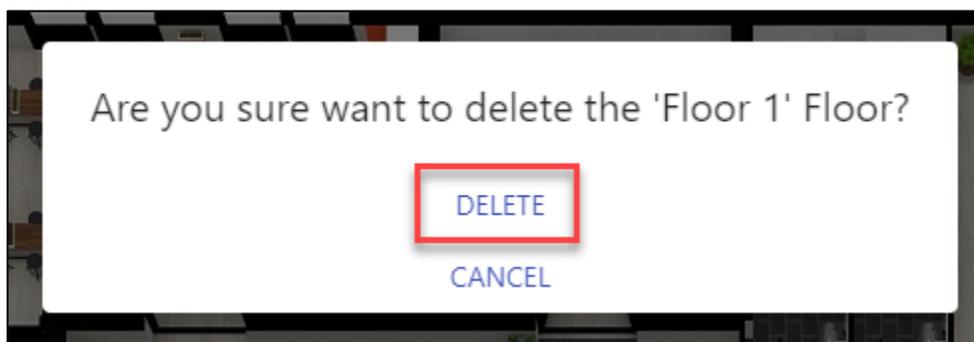
CharterDesk Installation Guide

5.2.4 Delete a Floor

1. Navigate to the admin web part page in site. In Floor Editor tab, select the floor in **Floors** dropdown, you would like to delete.
2. Click on the **DELETE** button to delete the floor.



3. It will ask for confirmation and once you click on **DELETE** button, the floor will be deleted from the list.

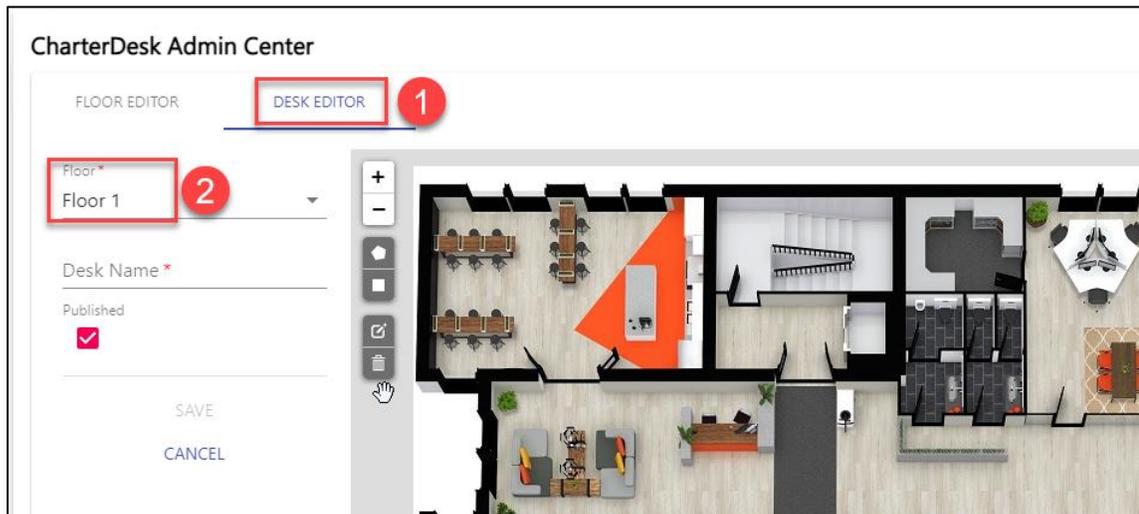


CharterDesk Installation Guide

5.3 Desks Management

5.3.1 Create a Desk

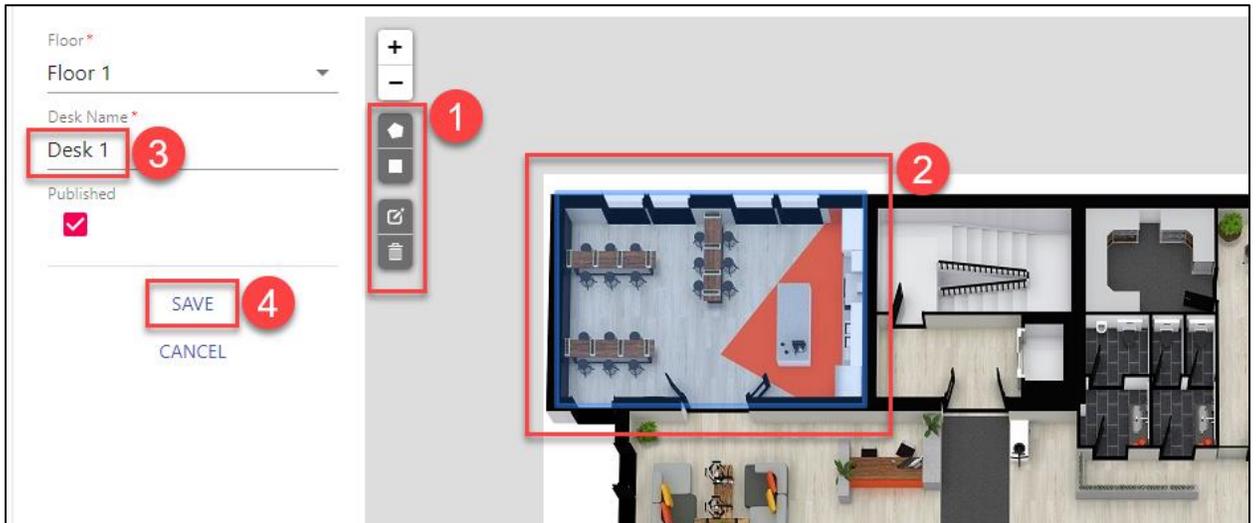
1. Navigate to the admin web part page.
2. Click on **DESK EDITOR** tab.
3. Select the floor on which you want to create the desks from the **Floor** dropdown. It will load the floor plan on the right side with the tools to draw the desk.



4. In Map editor, there are tools provided in the left side of map to draw the shapes on floor plan image.
5. Draw the rectangle or pentagon based on your requirement.
6. Add the name of desk in textbox.
7. Make sure Published checkbox checked as in the below screenshot.

CharterDesk Installation Guide

8. Click on **SAVE** button to create a desk.



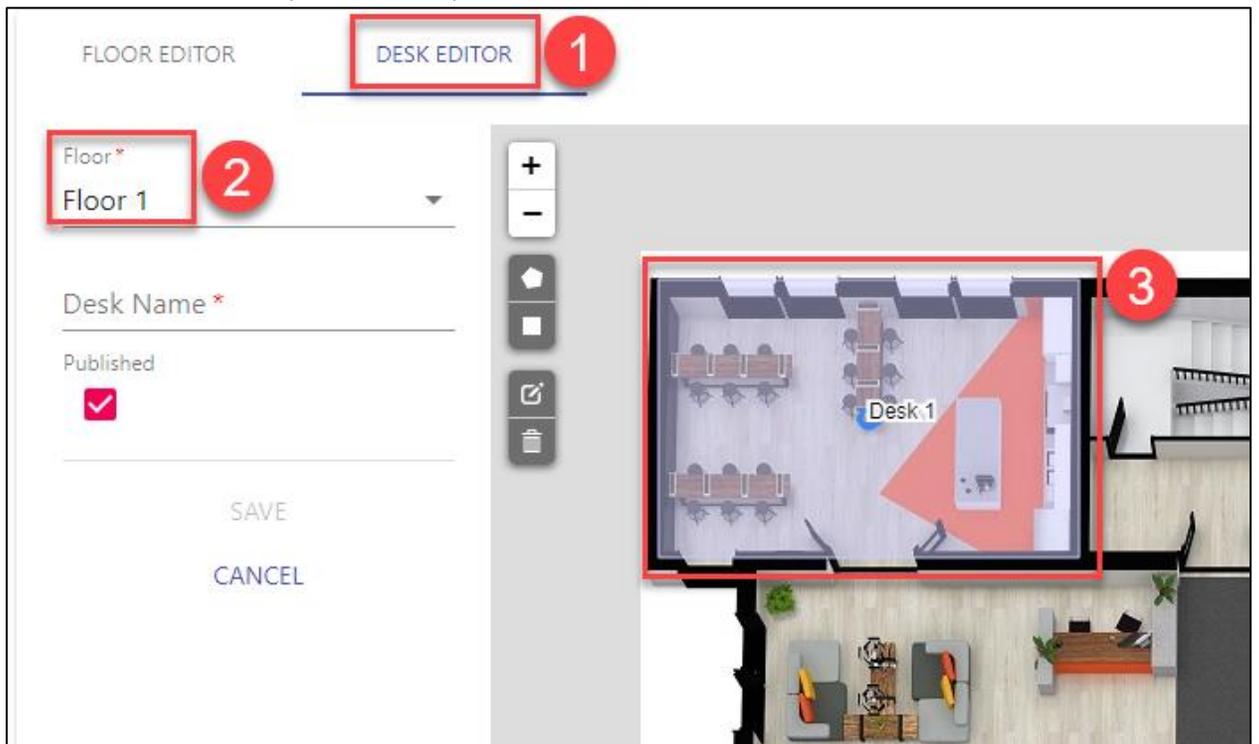
9. On successful desk creation, it will look like below.



CharterDesk Installation Guide

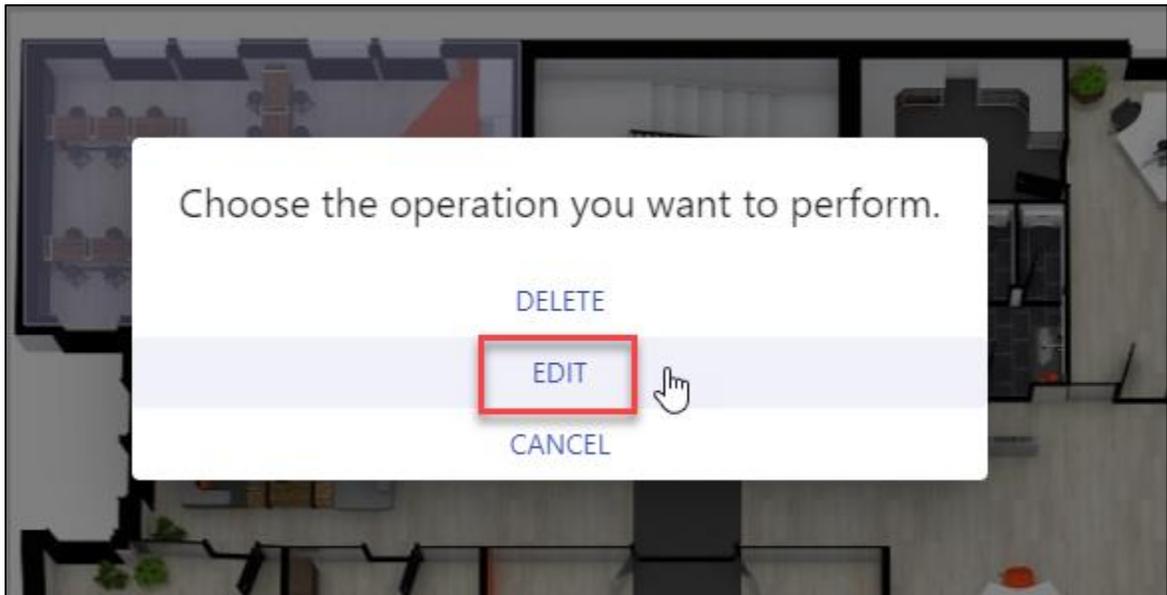
5.3.2 Edit a Desk

1. Navigate to the admin webpart page in site.
2. Go to the **DESK EDITOR** tab.
3. Select the floor in **Floor** dropdown to update the desk created on that floor.
4. Click on the desk which you want to update.

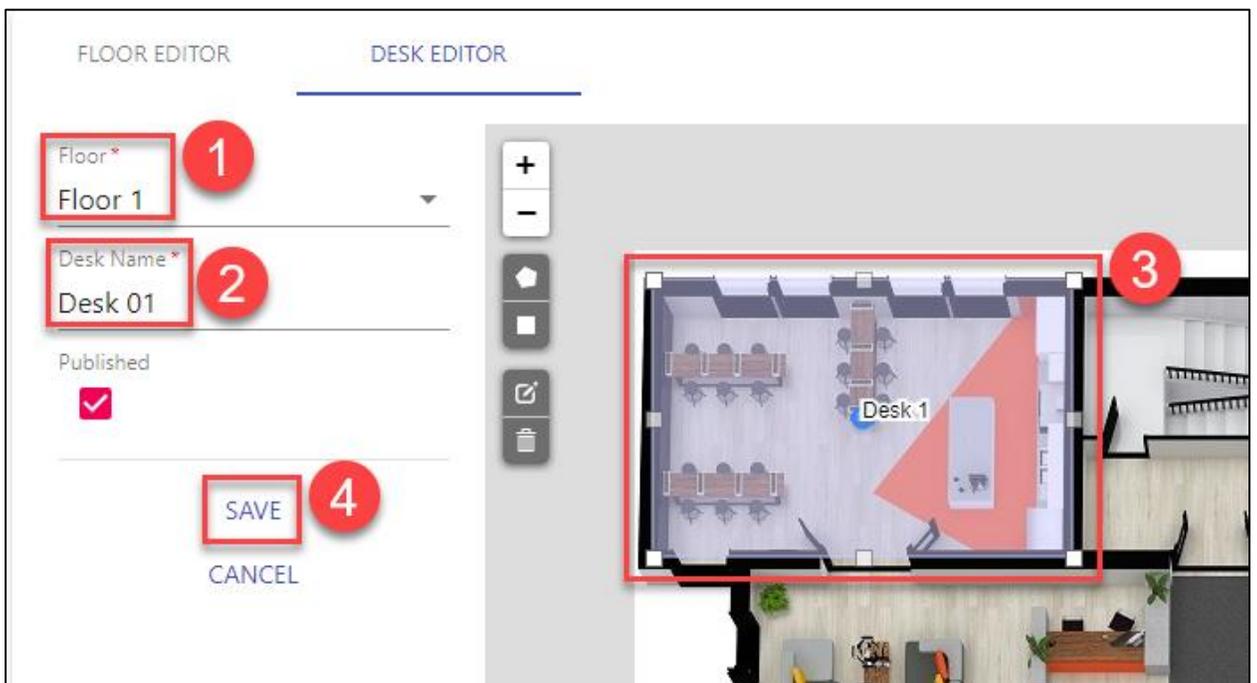


CharterDesk Installation Guide

5. It will open a dialog with the choices as below.



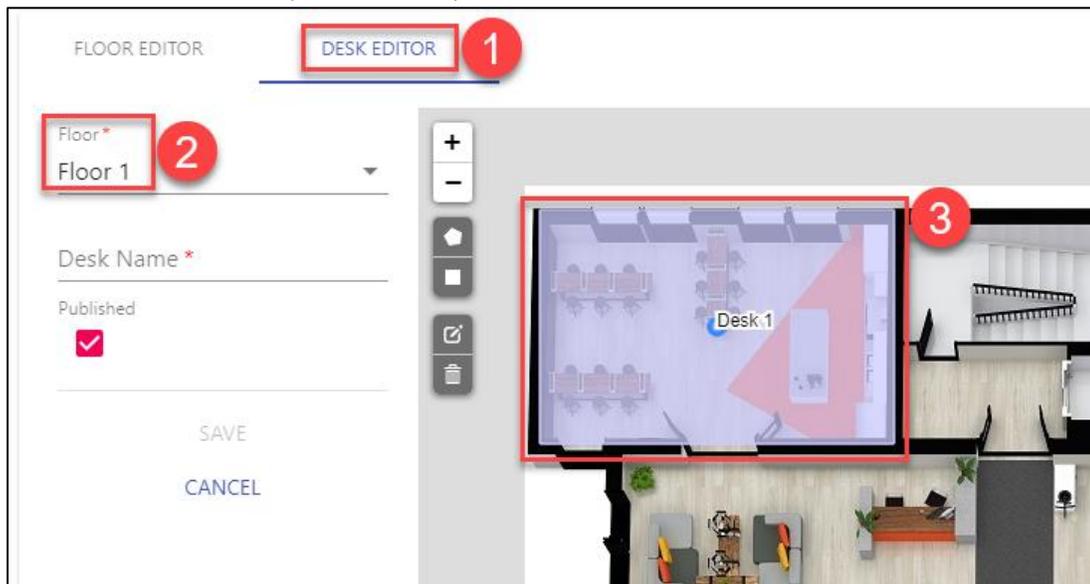
6. Click on **EDIT** button. It will render that desk in edit mode. Adjust the shape or update the name of the desk and click on the **SAVE** button.



CharterDesk Installation Guide

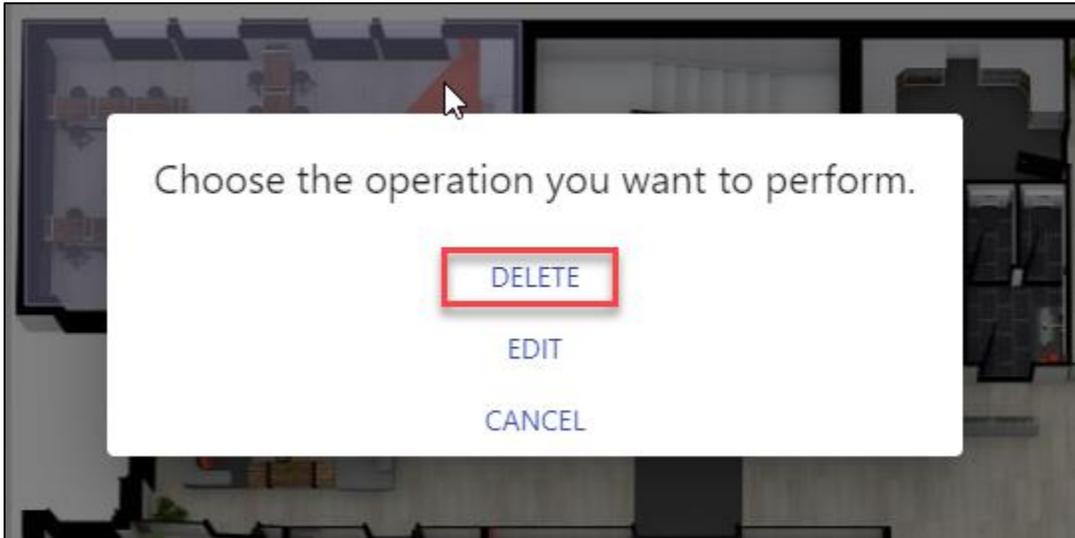
5.3.3 Delete a Desk

1. Navigate to the admin webpart page in site.
2. Go to the **DESK EDITOR** tab.
3. Select the floor in **Floor** dropdown to update the desk created on that floor.
4. Click on the desk which you want to update.

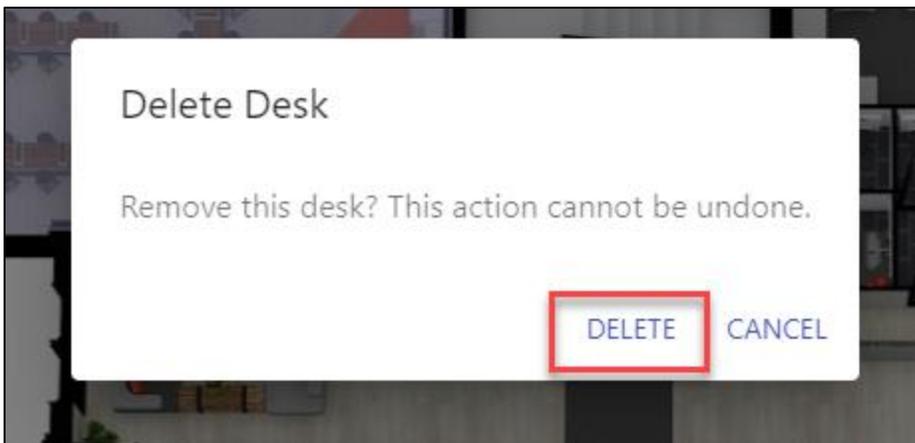


CharterDesk Installation Guide

5. It will open a dialog with the choices as below. Click on **DELETE** button.



6. It will ask for confirmation. Again, click on the **DELETE** button.



Note: You will have to re-arrange the desks on floor plan image by editing each desk from desk editor, if you update the floor plan image for any floor from Floor Editor.

INSTALLATION DEPLOYMENT COMPLETE - HAPPY BOOKING 😊



CharterDesk Installation Guide

6 Admin Portal

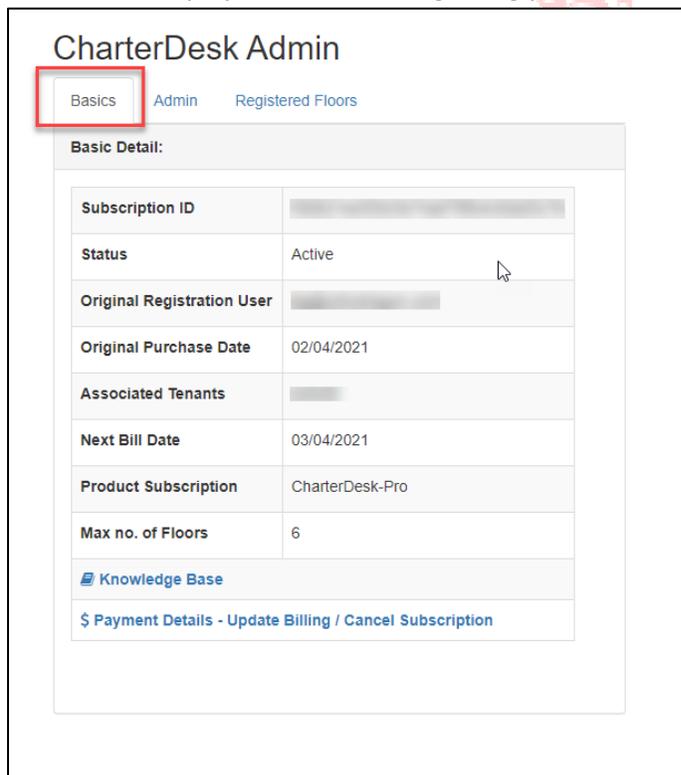
Open CharterDesk Admin web part page and click on button **GO TO ADMIN PORTAL** to open the admin portal.



The Admin Portal page will have 3 tabs:

6.1 Basics Tab

This tab will display all the details regarding your current subscription.



CharterDesk Installation Guide

6.2 Admin Tab

1. Click on **Admin** tab to open it.
2. You will find already added administrators in right side of the table.

The screenshot shows the CharterDesk Admin interface. The 'Admin' tab is selected and highlighted with a red box. Below the tabs, there is an 'Add Admin:' section with an input field for 'Email ID of the user' and a red 'Add' button. To the right, there is a table titled 'Admins' with columns 'Email', 'Primary Admin', and a 'Delete' button. The table contains one row with a blurred email address and 'true' in the Primary Admin column.

Email	Primary Admin	
[blurred]	true	Delete

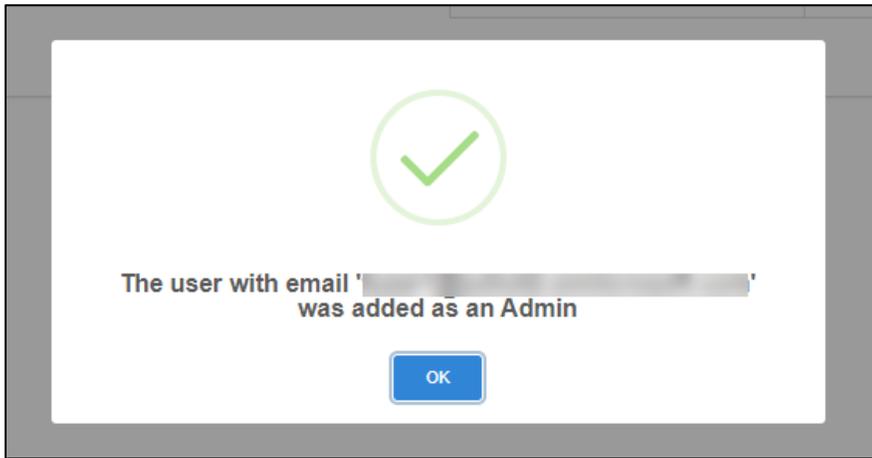
3. Add email address of user whom you would like to add as a CharterDesk Administrator. And click on **Add** button.

The screenshot shows the CharterDesk Admin interface. The 'Admin' tab is selected. Below the tabs, there is an 'Add Admin:' section with an input field for 'Email ID of the user' and a red 'Add' button. To the right, there is a table titled 'Admins' with columns 'Email', 'Primary Admin', and a 'Delete' button. The table contains one row with a blurred email address and 'true' in the Primary Admin column. Red circles with numbers 1 and 2 are placed over the 'Add' button and the input field, respectively, indicating the steps for adding a new administrator.

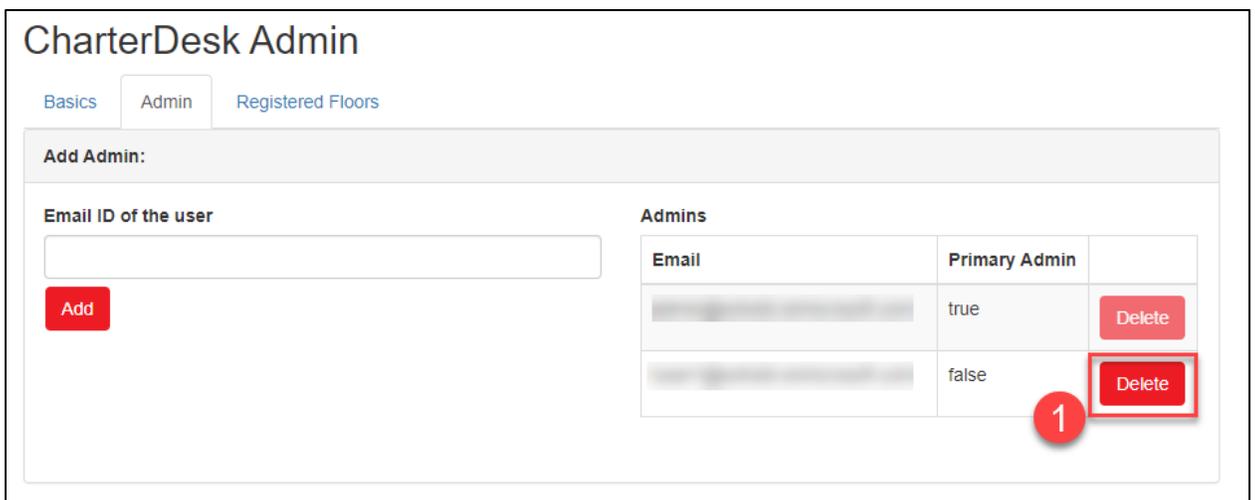
Email	Primary Admin	
[blurred]	true	Delete

CharterDesk Installation Guide

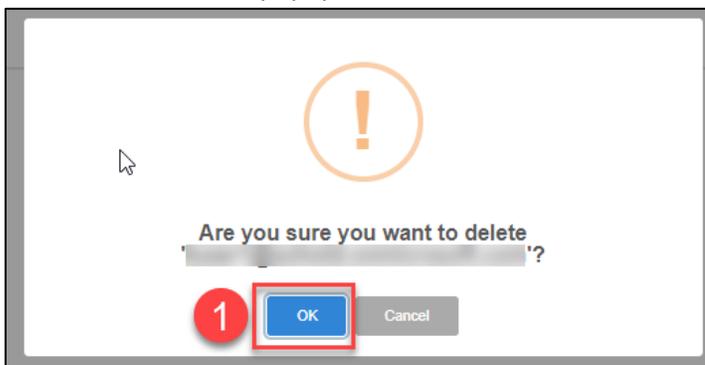
4. The popup will appear to display a success message as below:



5. Click on **Delete** button to remove the user from administrator.



6. Click on **OK** button in popup to remove the user from administrator.

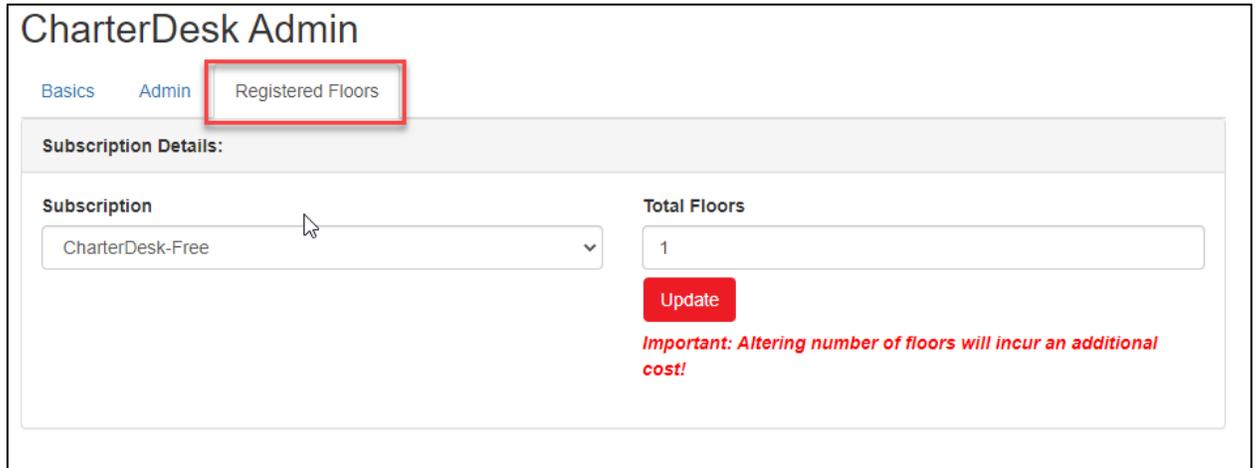


Note: The user whose email address is used to purchase this subscription will become primary administrator. And primary administrator cannot be removed from the list.

CharterDesk Installation Guide

6.3 Registered Floors Tab

Click on **Registered Floors** tab to open it.



CharterDesk Admin

Basics Admin **Registered Floors**

Subscription Details:

Subscription: CharterDesk-Free

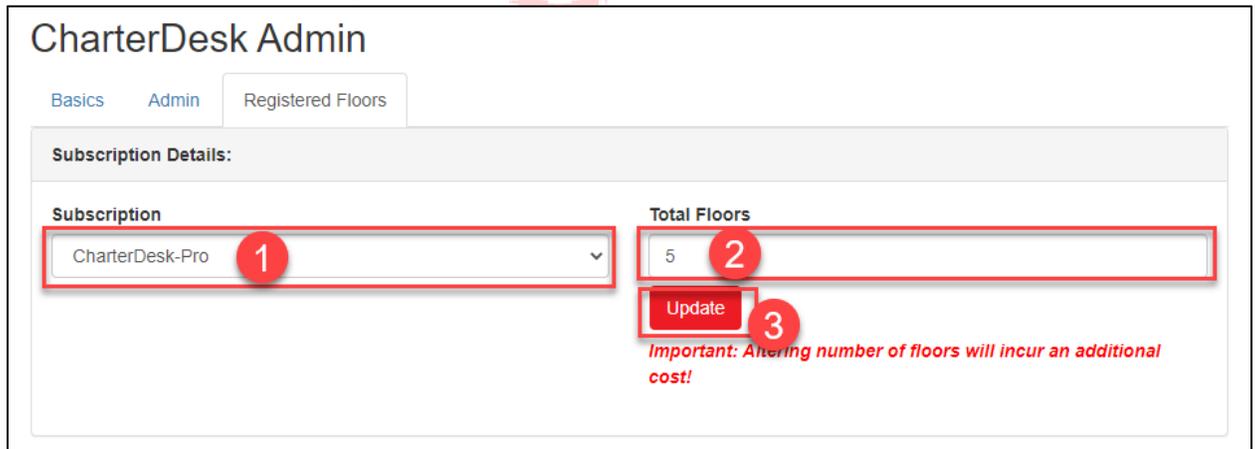
Total Floors: 1

Update

Important: Altering number of floors will incur an additional cost!

6.3.1 Upgrade from CharterDesk-Free to CharterDesk-Pro subscription

1. Select "CharterDesk-Pro" option from **Subscription** dropdown.
2. Update the number of floors in **Total Floors** textbox.
3. Click on **Update** button to upgrade the subscription.



CharterDesk Admin

Basics Admin Registered Floors

Subscription Details:

Subscription: CharterDesk-Pro **1**

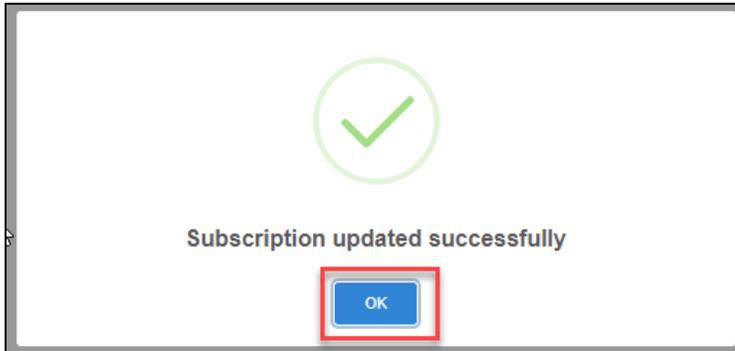
Total Floors: 5 **2**

Update **3**

Important: Altering number of floors will incur an additional cost!

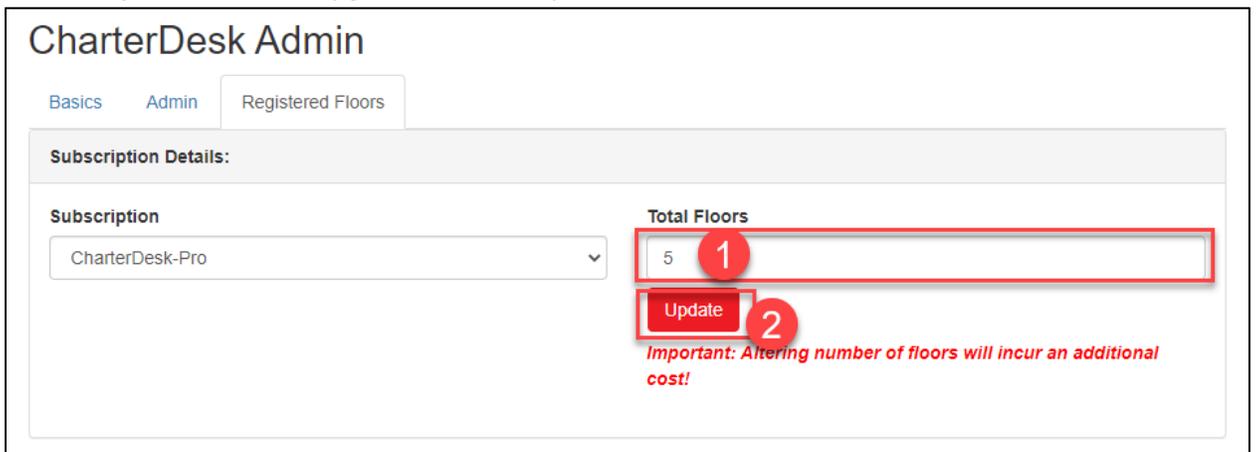
CharterDesk Installation Guide

- The popup will appear to display a success message as below. Click on **OK** button to close the popup.

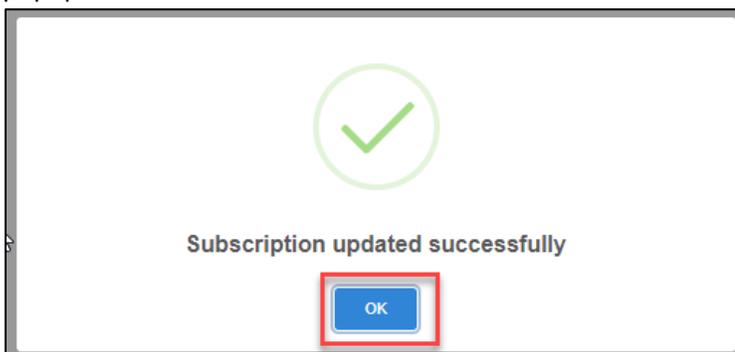


6.3.2 Update floors for CharterDesk-Pro subscription

- Select "CharterDesk-Pro" option from **Subscription** dropdown.
- Update the number of floors in **Total Floors** textbox.
- Click on **Update** button to upgrade the subscription.

A screenshot of the CharterDesk Admin interface. The title "CharterDesk Admin" is at the top. Below it are three tabs: "Basics", "Admin", and "Registered Floors". The "Admin" tab is selected. Underneath, there is a section titled "Subscription Details:". It contains a "Subscription" dropdown menu with "CharterDesk-Pro" selected. To the right of this is a "Total Floors" input field containing the number "5". A red circle with the number "1" is placed over the input field. Below the input field is a red "Update" button with a red circle and the number "2" next to it. Below the button, there is a red warning message: "Important: Altering number of floors will incur an additional cost!".

- The popup will appear to display a success message as below. Click on **OK** button to close the popup.



CharterDesk Installation Guide

7 Useful Links

How to make a booking

<https://charterdeskkbase.sohodragon.nyc/index.php/knowledge-base/end-user-guide-to-charterdesk/>

Licensing Explained <https://charterdeskkbase.sohodragon.nyc/index.php/article-categories/licensing/>

