

AGREEYA



Quick Start Guide for QuickApps qChartView



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Refer to our web site (www.agreeya.com) for regional and international office information.

Quick Start Guide for QuickApps qChartView Updated March 2021

### Introduction

This document is helpful for SharePoint Administrators, Tenant Administrators and **QuickApps qChartView** users as it enables them to quickly start working with the app.

QuickApps qChartView is a SharePoint add-in. This add-in allows you to:

- Quickly generate more than 30+ chart types by aggregating SharePoint list data from one or more lists/document libraries.
- Use point-and-click configuration instead of using custom code to customize SharePoint solutions up to 80 percent faster.
- Meet your most complex business requirements, from interface enhancements to complete solutions, without need for custom development training or experience.

### System Requirements

To install QuickApps qChartView, you must meet the following minimum system requirements:

#### **Table 1. Minimum System Requirements**

| Feature               | Requirement   |  |  |  |  |
|-----------------------|---|--|--|--|--|
| <b>Rights and</b>     | SharePoint Tenant Administrator rights on the SharePoint Site for installation. |  |  |  |  |
| permissions           | Site Admin Rights for configuration of app                                      |  |  |  |  |
|                       | Read Rights for viewing data and basic operation                                |  |  |  |  |
| SharePoint<br>Version | SharePoint Online   |  |  |  |  |
| Browser               | Edge, Latest version of Chrome, Firefox, and Safari, Internet Explorer 11.      |  |  |  |  |

## Deploying QuickApps App

Follow these steps to deploy the QuickApps qChartView app to an organization's App Catalog.

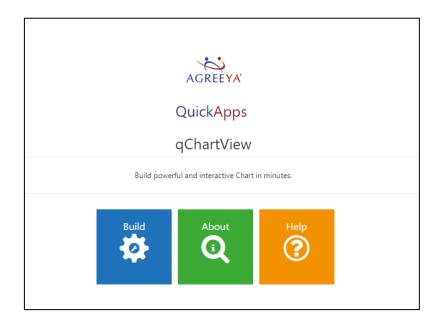
- 1. To buy an app from the SharePoint Store refer to: <u>https://support.office.com/en-us/article/Buy-an-app-from-the-SharePoint-Store-dd98e50e-d3db-4ecb-9bb7-82b189822d43</u>
- 2. To add an app to a site refer to:

https://support.office.com/en-us/article/Add-an-app-to-a-site-ef9c0dbd-7fe1-4715-a1b0fe3bc81317cb?ui=en-US&rs=en-US&ad=US

- 3. To add an App Part to a page refer to: <u>https://support.office.com/en-us/article/Add-an-App-Part-to-a-page-6f06c0b7-44b8-4c69-b4ad-85197eee8d78</u>
- 4. To add the **QuickApps qChartView** app part on a SharePoint page, follow these steps:
  - Create a page in the site where you want to add the QuickApps qChartView app.
  - Edit the page and click the + button to add webparts on page.
  - Next, select the **qChartView** app to add.

|                     | +                                    |   |  |
|---------------------|--------------------------------------|---|--|
| Add your text here. |                                      |   |  |
|                     | Sort A-Z<br>QuickApps-<br>qChartView | A |  |
| omments • On        |                                      |   |  |

- Now save the page. **QuickApps qChartView** app will be added to the page. You will be shown a screen below.
- Now refresh the page where **QuickApps qChart** app will be added to the page. You can now configure the app by clicking the **Build** button.



• If you have, the Site Admin rights then click the **Build** button in the app to open 'QuickApps qChartView' in Configuration Mode.

| RIMARY CONTENT      | Content / Primary Content           |            |   | c ot   | lick to get | Help   |  |
|---------------------|-------------------------------------|------------|---|--|-------------|--|--|
| ILTERING            | Title*                              | qChartView |   | Clieck to add<br>chart type                    |             | Please select the chart type for preview the |  |
| EARCH/ FILTER PANEL | Chart Type                          | Chart:None |   | €dit   |             | chart  |  |
|                     | Data Source:                        | None       | ~ | Click to<br>select list                        | )           |  |  |
|                     | Viewed Lists                        | None       |   | ✓Edit<br>Click to<br>Configure<br>Chart series | REVIEW *    |  |  |
|                     | Configuration                       | None       |   | PEdit Chart series                             |             |  |  |
|                     | Drill Chart Configuration           | None       |   | ₽Edit  |             |  |  |
|                     | Organization Chart<br>Configuration | None       |   | <pre></pre>                                    |             |  |  |

• From the **Content > Primary Content** section, enter **Title**.

- Click the Edit button next to Viewed List to select one or more SharePoint lists.
- Click the **Edit** button next to **Chart Type** to select a chart type.
- Click the Edit button next to Configuration to add one or more data series.
- For **help** on any section click the Help icon **?** from the top-right corner.
- Click the **Save** button to save the changes.
- QuickApps qChartView Chart will be rendered as per configuration.

| qChartView |   |                 |
|------------|---|-----------------|
|            |   | $\equiv$ $\sim$ |
| 10,00      | 9,000<br>8,310 8,700 8,700 8,500 8,300 8,600 8,200 8,400 8,400                      |                 |
| 8,00       |   |                 |
| 4,00       |   |                 |
|            | April August Decem Februa Januar July June March May Novem Octobe Septe<br>ber ry y |                 |

- For updating configuration, click the **Menu** icon = and then the **ezEdit** gear icon \* .
- For help click the **Help** icon <sup>2</sup> from the menu.

# About AgreeYa

AgreeYa listens to customers and delivers worldwide innovative technology, business solutions and services they trust and value. For more information, visit www.agreeya.com.

### Contacting AgreeYa

Technical support: Online support

Product questions and sales: 1-800-AGREEYA

Email: quickapps@agreeya.com

### Technical support resources

Technical support is available to customers who have purchased AgreeYa software with a valid maintenance contract and to customers who have trial versions. To access the Support Portal, go to http://quickapps.agreeya.com/support/.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. In addition, the portal provides direct access to product support engineers through an online Service Request System.

The site enables you to:

- Create, update, and manage Service Requests (cases)
- View Knowledge Base articles
- Obtain product notifications
- View how-to videos
- Engage in community discussions