

# KOADX Modelling Tool Cheat Sheet



Note: This example, a Logistics Tracking System, is also shown in the [Product Demonstration video](#) and in the [full Modelling Tool User Guide](#).

Log in with your registered details.

## 1: Create a new model

Click +New, enter your model name.

Select Configuration which is currently C# .Net 8 / SQL Server 2022.

Save & Close or continue to configure.

## 2: Configuring your model

- Click **Configure** to access the following tabs, complete all tabs:
- **Save Answers** button is only enabled after completing all sections.

## 3: Technologies to use

- Choose **C# .Net 8**, set a **Root Namespace** (e.g., LogTrk).
- Select **SQL Server 2022**, complete tenanting details.
- **Save Answers** and proceed.

## 4: Lookups

- Add dropdown lists (picklists) using **+New**.
- Enter a Names and Values, set a Default Value.
- Save & Close, then proceed.
- Your additions will appear as a list which can be edited.
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- Then **Save & Close**. Repeat the process for all your system lookups.

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## 5: Roles

- For role-based user management add information here.
- Define user roles for security and workflow.
- Use **+New**, enter a name and display name.
- Save & Close, then proceed.
- You will see **Roles** appear in a listing, just like Lookups, and when you have finished entering them click **Next Step**

## 6: Data Classes

- You must have at least one **Data Class** with one **Property** in your model.
- Add **+New** data classes with at least one property.
- Avoid restricted names (warnings provided).
- Use **Manage Properties** to add fields (see 9).
- Assign workflows (see 10).
- Restrict API access if needed (see 11).

## 7: Relationships

- Click **+New** to define parent-child relationships.
- Set a name, display name, and plural display name.
- Add properties if needed.
- Special relationships include **User** (assign roles) and **Document** (attach files).

## 8: Finishing Model Entry and Building Your Code

- Click **Finished** after completing the setup.
- Click **Build** to generate code.
- Download your code once the status says **Built**.
- Use the editor of your choice to view.
- Re-run the build if changes are made.

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## 9: Managing Properties

- Types include:
  - **String** (set size, default value)
  - **Date/Time** (full or date-only, default to UTC)
  - **Integer/Long Integer**
  - **Decimal** (precision & scale)
  - **Boolean** (true/false toggle)
  - **Lookup** (select from predefined lists)

For each Property Type you need to give it a Name / Display Name and on each dialog, there are also **Mandatory** and **Include in Summary** fields.

If **Mandatory** is switched on, when an API call creates the data class or relationship, a value of that property must be supplied. Failure to supply the value will generate an error message.

## 10: Managing Workflow

This is where you enter information about how your data moves through your system. For example, in Logistics Tracking, how an order is processed along a shipping pipeline, and who can do what to the associated information. Workflows are available for Data Classes and Relationships.

- Define **Workflow States** (e.g., Proposed → Active → Archived).
- Use **+New** to add states.
- Set an **Initial State** (starting point of workflow).
- Define **State Transitions** (who can move between states).

## 11: Managing API Endpoint Restrictions

Additional role-based restrictions can be added to any of the API endpoints, for both data classes and relationships. Against a data class/relationship, click the green padlock icon, and the following dialog appears.

- Control role-based access to API actions.
- Click the **padlock icon** to restrict operations (e.g., deleting a supplier location).
- Assign specific roles (e.g., only Supplier Admins can delete suppliers).