



# How to Guide

## Authentication

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# 1. Document Purpose

The purpose of this document is to guide users on how to access and configure the authentication option with the BDB Platform. It is recommended that users follow the step by step process given below.

# 2. Pre-requisites

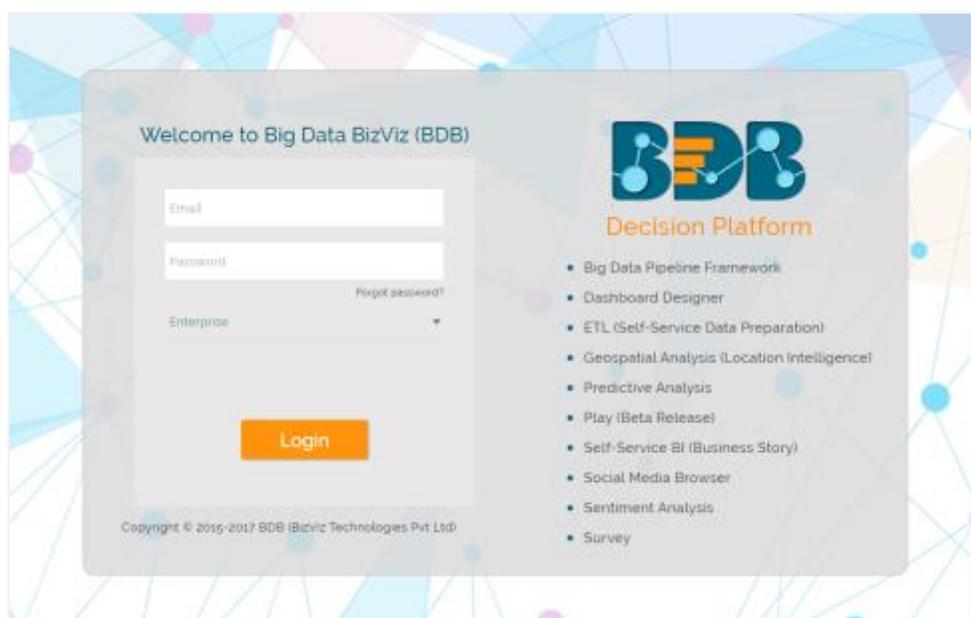
- o Browser that supports HTML5
- o Operating System: Windows 7
- o Basic understanding of the BizViz Server

# 3. Step-by-Step Process

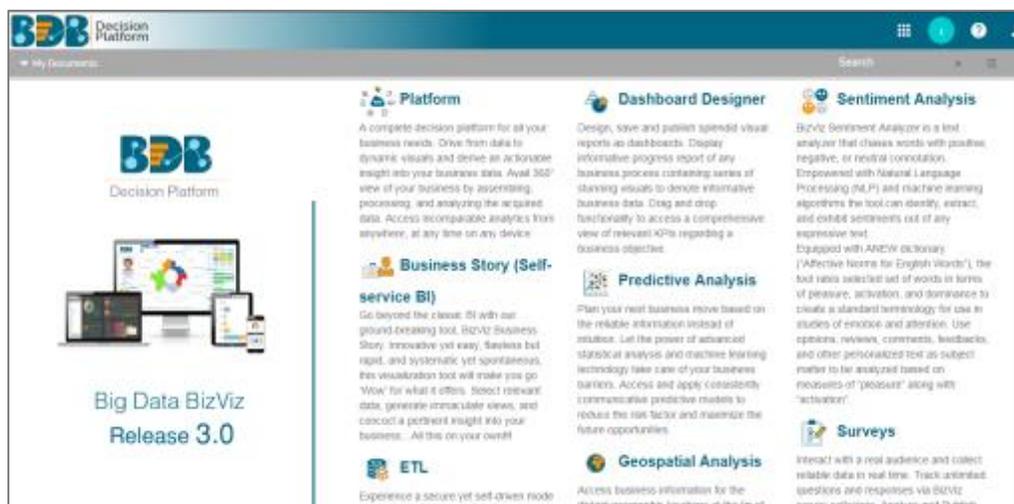
## 3.1. Accessing the BDB Platform

This section explains how to access the BizViz Platform and variety of plugins that it offers:

- i) Open BDB Enterprise Platform Link: <http://apps.bdbbizviz.com/app/>
- ii) Enter your credentials to log in.
- iii) Click 'Login'



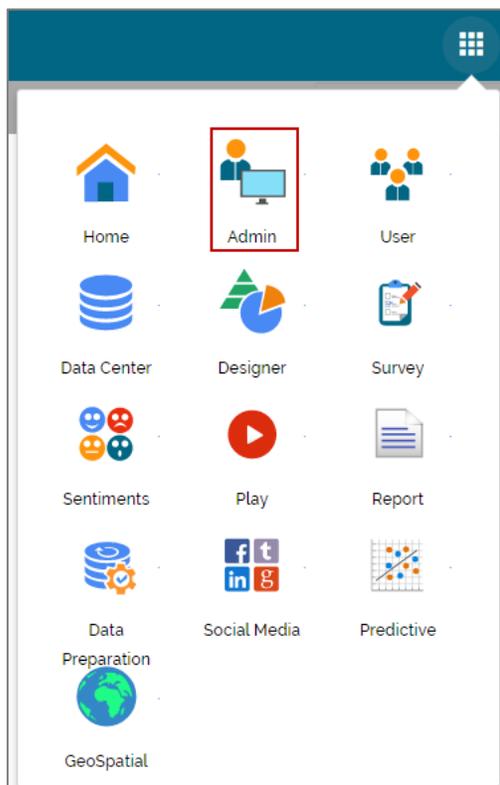
- iv) Users will be redirected to the BDB Platform home page.



### 3.2. Accessing the Administration Module

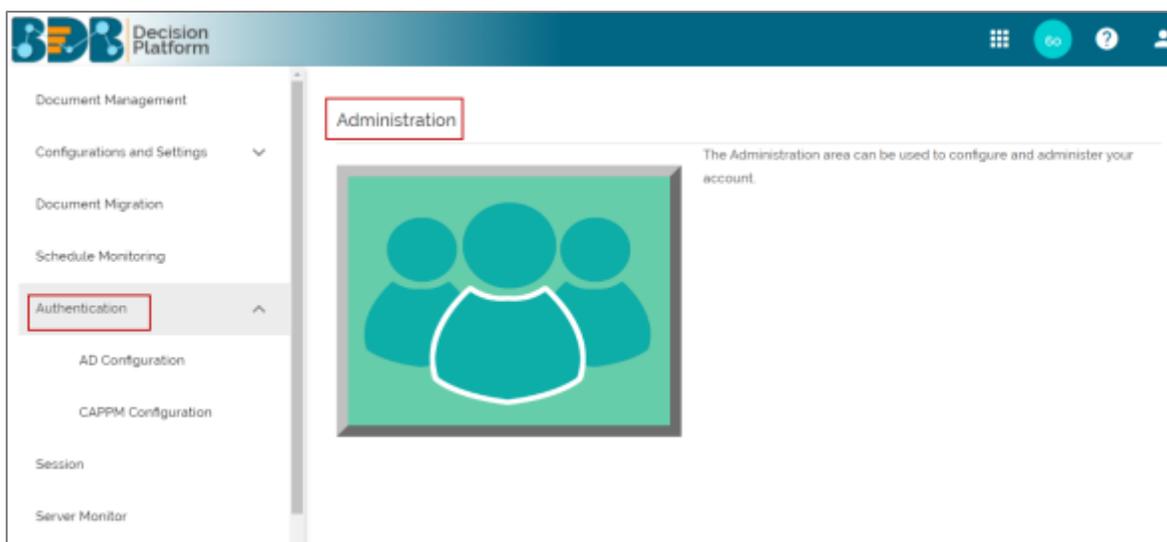
Configuration settings for the various platform plugins are covered under this section.

- i) Navigate to the Platform home page.
- ii) Click 'Apps' menu
- iii) A menu containing all the plugins will be displayed.
- iv) Select and click the 'Admin' plugin.



- v) Users will be directed to the 'Administration' page.

- vi) Various administration options will be displayed on the left side of the page.
- vii) Select 'Authentication' from the list of the admin options.

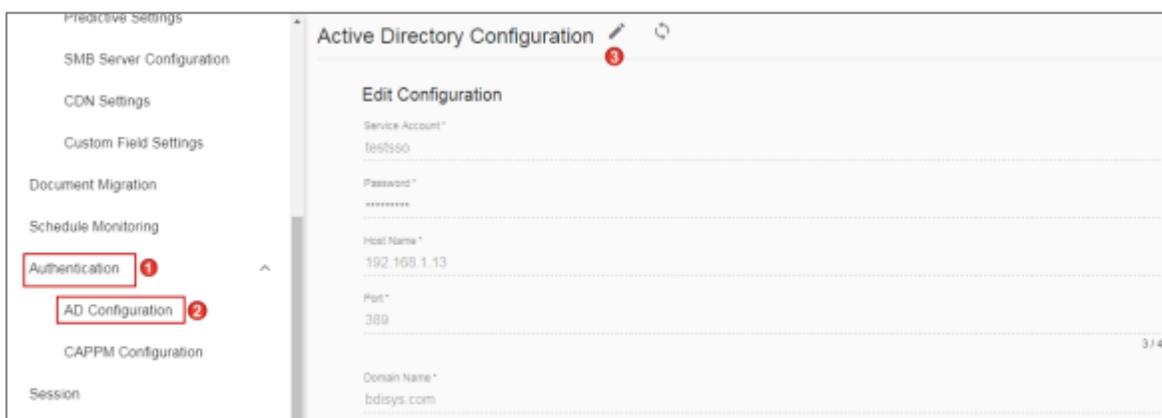


Note: The administrator can configure windows AD or CA Clarity accounts via the 'Authentication' option.

### 3.2.1. Active Directory Configuration

The Windows AD security enables you to map user accounts and groups from your AD 2008 user database to the BizViz platform. It also enables the system to verify all logged on requests that specify AD Authentication. Users are authenticated against the AD user database and have their membership in a mapped AD group verified before the BizViz platform grants them an active session. You can use the plug-in to configure updates for the imported AD groups.

- i) Click 'Authentication' option from the list of admin options.
- ii) Click 'AD Configuration' authentication option.
- iii) Click the 'Edit' icon  provided on the 'Active Directory Configuration' page.



- iv) Fill in the following information:
  - **Service Account:** Name of the Windows AD service account
  - **Password:** Secure authentication credential
  - **Host Name:** IP address of the Windows AD server
  - **Port:** Port number of Windows AD
  - **Domain Name:** Enter the Domain Name

v) Click 'Save'

### Active Directory Configuration

#### Edit Configuration

Service Account\*  
testssso

Password\*  
\*\*\*\*\*

Host Name\*  
192.168.1.13

Port\*  
389

3 / 4

Domain Name\*  
bdisys.com

CLEAR    SAVE

- vi) Once you get confirmation that AD details are saved, click the 'Synchronize' option.
- vii) Select a user group using the 'User Group List' drop-down menu.
- viii) Select and move users from 'User List' to the 'Selected User List'
- ix) Click 'Save'

### Active Directory Configuration

#### Sync Configuration

User Group List\* 2  
Domain Admins

User List

- bijeesh.op
- Administrator

3

➔

➤

➤

➤

➤

Selected User List

- sivan.n

CANCEL    4 SAVE

x) A pop-up message will appear to assure that the user list has been updated.

User list updated successfully...Please contact administrator to add respective user groups

### 3.2.2. CAPPM Configuration

Security in CA Clarity PPM has two aspects: i) securing the application and, ii) securing its data. The security mechanism and control are the same for both.

**a. Securing the Application:** It verifies that the correct users have access to the appropriate application functionality. User access and capabilities are controlled by this type of clarity security.

**E.g.** Administrator is provided more rights than an end user.

**b. Securing the Application Data:** It verifies that resources have access only to the assigned data.

**E.g.** everybody should be able to see the platform page, but with their assigned projects and functionalities.

- i) Select the 'CAPPM Configuration' using the 'Authentication' Admin option.
- ii) Click the 'Edit' icon  provided on the 'CAPPM Configuration' window.
- iii) Fill in the required information:
  - i. **Username**
  - ii. **Password**
  - iii. **CA PPM Server:** URL details of the Clarity server (E.g. http://dashboards.xyz.com)
  - iv. **User Access NQUERY:** Name of the Query that will fetch a list of the Clarity users
- iv) Click 'Save'



**CAPPM Configuration**

Username \*  
pnayar

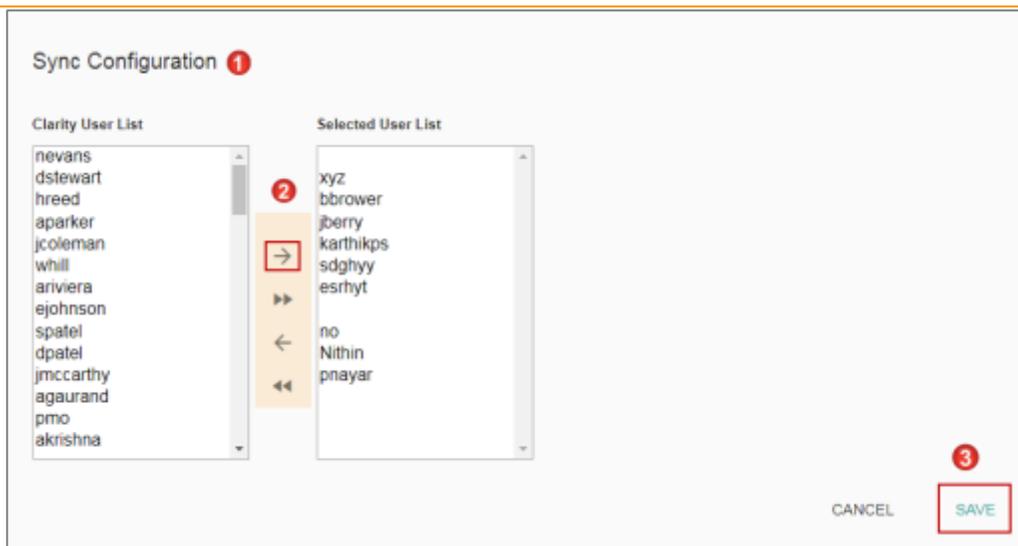
Password \*  
\*\*\*\*\*

CA PPM Server \*  
http://cappm.anniteknavigator.com

User Access NQUERY  
Ann\_users

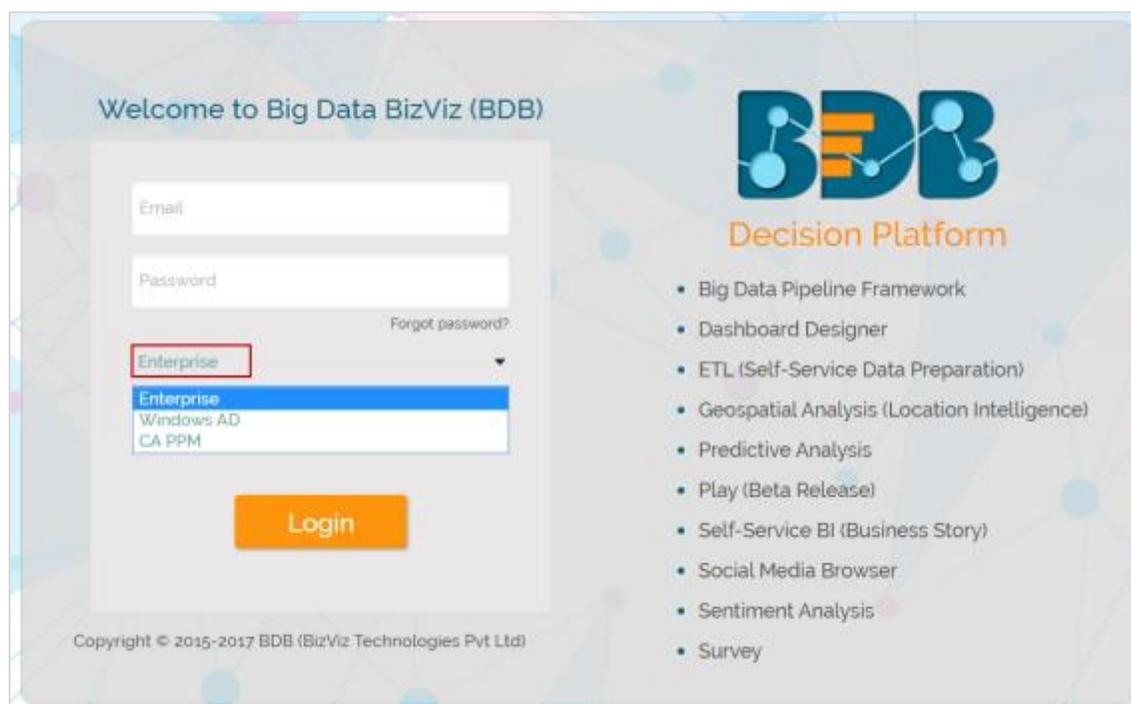
CANCEL SAVE

- v) Once you get confirmation that CAPPM configuration details are saved, click the 'Synchronize'  option.
- vi) Select a user group using the 'User Group List' drop-down menu.
- vii) Select and move users from 'User List' to the 'Selected User List'
- viii) Click 'Save'



### 3.2.3. Enterprise

Enterprise authentication is the default authentication method for the BDB platform; it is automatically enabled when you first install the system. Users do not have to configure or enable Enterprise authentication- it cannot be disabled.



The BDB platform keeps user and group-specific information within its database while adding or managing users and groups. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BDB platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server.

Note: Users can opt for the other authentication settings to meet their organization's security requirements. The authentication settings can be changed through the administration module.

## 4. Signing Out

The following steps describe how to sign out from the BizViz Platform:

- i) Click the 'User' icon  on the Platform home page.
- ii) A menu appears with the logged in user details.
- iii) Click 'Sign Out'
- iv) Users will be successfully logged out from the **BizViz Platform**.

**Note:** By Clicking the 'Sign Out' option users will be redirected to the 'Login' page of the BizViz platform.