

User Management

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1. Document Purpose

The purpose of this document is to guide users on how to access and configure the User Management module 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: <u>http://apps.bdbizviz.com/app/</u>
- ii) Enter your credentials to log in.
- iii) Click 'Login'

Welcome to Big Data BizViz (BDB)	BBR
Enal	Decision Platform
Paramet	Big Data Pipeline Framework
Porpot session/01 Enterprise	Dashboard Designer ETL (Self-Service Data Preparation)
	Geospatial Analysis (Location Intelligence) Predictive Analysis
Login	Play (Beta Release) Self-Service BI (Business Story)
	Social Media Browser Sentiment Analysis
Copyright © 2015-2017 BDB (Bickliz Technologies Pvt Ltd)	Survey

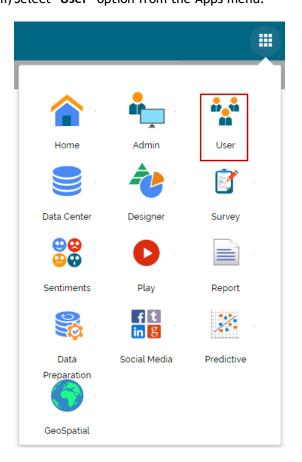
iv) Users will be redirected to the BDB Platform home page.





3.2. Accessing the User Management Page

- i) Navigate to the platform home page.
- ii) Click the '**App**' menu button
- iii) Select '**User**' option from the Apps menu.



iv) Users will be redirected to the User Management page.



	cision tform										10	0	•
User Manage	ment]										NEV	v
User Group					Type		Status						
Search User Group	Sh	owing 134	outofi	34	Enterprise Search User	Ŧ	Active			A,Z	Showing	DE out o	of 0.8
All Group											anowing	100 001 0	1 00
checknn	1	Ø	È	Å	David Brown				1	Ø	ii	с	Î
GKTEST0324AUG	1	~	Ê		John Martin				1	\oslash		G	
GKTEST0224AUG	1	Ø	ė		userTestAudit				1	\oslash	ii	C	
GKTEST24AUG	1	0	Ê		GKTESTFOUR				1	\oslash		С	
hyderabaduser21	1	0	ė		GKTESTTHREE				1	\oslash		С	
TestGRP04q	/	0	Ê		uhuihuhu				1	Ø		c	

Note: The admin can search for a specific user or group by using the 'Search' boxes.

3.3. Creating a New User Group

- i) Click the 'NEW'.
- ii) A context menu opens.
- iii) Select 'Group' option from the context menu.

		NEW
+ <u>*</u>),	Group	
+•	User	

- iv) Provide the following information for a new User Group:
 - a. **Group Name:** Enter a name for the user group (Maximum provided word limit is 20 words)
 - b. **Description:** Describe the user group (optional) (Maximum provided word limit is 150 word)

User Group	CANCEL	SAVE
Group Name* Sample User Group		
Description		17 / 20
<u> </u>		0 / 150



c. Add User to Group: Click the 'Add' button and select User(s) by check marking in the box from the pop-up window.

	Add User to Group
User Group	search da
Add User to Group	Select All
1 Selected	David Brown
	RestAssuredAutomate

d. **Group Permission:** Click the 'Add' button provided next to the Group Permissions option. Assign various plugin/app rights to the User Group via the 'Group Permissions' pop-up window (It is Mandatory).

	Group Permissions	×
User Group	Select All	
Add User to Group	OTMS	
1 Selected	🗾 Data Center	~
Group Permission *	Predictive Analysis	~
	User Management	~

e. Folder Permissions: Click the 'Add' button provided next to the Folder Permission option. Assign various folder permissions to the User Group via the 'Folder Permission' pop-up window.

	Folder Permission ×
User Group	Select All
Add Lines to Crown	Create Folder
Add User to Group 1 Selected	🖌 Link a URL
	Rename
Group Permission *	Delete
	Сору
Folder Permission	Paste

f. File Permissions: Click the 'Add' button 👘 provided next to the File Permission



option. Assign various file permissions to the User Group via the 'File Permission' pop-up window.

	File Permission ×
User Group	Select All
Add User to Group	Modify Document
1 Selected	Rename
Group Permission *	V Delete
Croup Permission	🗸 Сору
Folder Permission	Add To Favorite
r older Permission	Remove From Favorite
	Properties ~
File Permission	Move To

v) Click 'Save'

vi) The newly created group will be listed under the User Group list (as shown below):

User Management			
User Group			
Search User Group	show	ving 68	out of 68
All Group			
Sample User Group	1	~	ê
PermissionGrp17july	1	\oslash	â
usermanagement	1	~	ê
HYD BI	1	\oslash	ê
GRPNEWTest	1	\oslash	ê
NGroup14July	1	\oslash	ê
Nandita	1	\oslash	ê
GRPCATEST	/	~	ê



Option	Name	Description			
1	Edit	To edit details for the selected user group			
\checkmark	Activate Group	To activate the selected user group			
\oslash	Block Group	To block the selected user group			
Ê	Assign Custom Fields	To assign the group-specific custom fields.			

3.3.1. Custom Field Settings

This section configures the custom fields settings that can later be added to user groups and assigned to the users of those groups.

- i) Navigate to the Administration module.
- ii) Open 'Configuration and Settings' menu.
- iii) Click 'Custom Field Settings'
- iv) The admin will be directed to a new page to set custom fields.

Configurations and Settings 🔷 📋	Custom Field	Settings 🖍				
Email Settings						
Password	Key* Nationality	Description * Nationality	Input Type Manual		Mandatory	×
Audit Trail Settings	Key	Description *	input Type			
Data Management Settings	State	State	Manual	*	Mandatory	×
Geo Settings	Key* City	Description* City Name	input Type Manual	×	Mandatory	×
Predictive Settings	Key*	Description "	Input Type			
SMB Server Configuration	Manager	Manager	Manual	w	Mandatory	×
CDN Settings	Key*	Description *	input Type			
Custom Field Settings	Department	Department	Manual	*	Mandatory	×

- v) Click the 'Edit' icon 🖍
- vi) Change the required custom field details.
- vii) Click 'SAVE' to save the inserted custom fields.



Key*	Description *	Input Type		
Nationality	Nationality	Manual	 Mandatory 	×
Key *	Description *	Input Type		
State	State	Manual	 Mandatory 	×
Key *	Description *	Input Type		
City	City Name	Manual	 Mandatory 	\times
Key*	Description *	Input Type		
Manager	Manager	Manual	 Mandatory 	×
Key *	Description *	Input Type		
Department	Department	Manual	Mandatory	×

Note:

- a. Click 'ADD FIELD' to add a new custom field.
- b. Click 'CLEAR' to erase the entered custom field details.
- c. Click the 'Remove Field' icon to remove a custom field.

3.3.2. Assigning Group Custom Fields

This feature is provided to user groups for assigning values to the set custom fields.

- i) Select a user group from the User Group list.
- ii) Click 'Assign Custom Field' option 🖹 provided next to the user group.
- iii) The 'Assign Custom Field to Group Users' page will be displayed.
- iv) Select a Custom Field using the drop-down menu.
- v) A new field will be displayed to assign the 'Field Value' for the selected custom field.
- vi) Click 'Save'

User Group Search User Group sam			۲	Assign Custom Field To Group Users	AVE
All Group				Group Name Sample User Group	
AngularSampleGroup	1	\checkmark	۰		
Sample User Group	1	Ø	۵	Select Custon Field * City	·
Sample Gr	1	Ø	۵	Field value *	
Sample	1	~	٥	Bangalore	
sample grp	1	Ø	٥	Select Users	
				0Selected	+

vii) A message will pop-up to assure that the group custom fields are updated successfully.



3.4. Creating a New User

- i) Click 'NEW'
- ii) A context menu opens.
- iii) Select 'User' option from the context menu.

	NEW
+). Group	
+ User	

- iv) Users will be directed to the 'New User' form.
- v) Fill in the following information to create a new User:
 - a. Email: Email address
 - b. Short Name: Short name of the user
 - c. Full Name: Full name of the User
 - d. Description: Describes the user (optional)
 - e. Password: Password to be assigned to the new user
 - f. Confirm Password: Confirm the above password

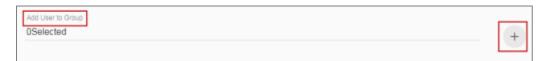
New User	CANCEL	SAVE
Enal '		
jmartin@abc.com		
Short Name "		
John Martin		
Pull Name 1		11 / 20
John Martin		
		11 / 20
Description		
Password 1		0 / 150
		8/16
Confirm Password 1		

vi) Preconfigured custom fields will be displayed in this form. Users need to provide the required details using the custom fields if marked as mandatory (The user will get group specific custom fields).



Custom Fields		
State		
California		
City*		
Sacramento		
Manager*		
David		
Department		
Dev.		

vii) Click the 'Add' option 👘 provided next to the 'Add User to Group' field.



- viii) A new window will open with the existing user groups list.
- ix) Select the user groups from the window to add the new user.
- x) Click 'Save'.

	Add	User to Group	×
New User	search no		
Description	Ξ	Select All	
Password *		TestGroupAnoop	
		NonAdmin Group	
Confirm Password *			
Add User to Group 1Selected			

- xi) Users will be directed to the existing user list.
- xii) The newly created user will be added to the user list.



Type Enterprise	Status • Active	*			ĄŻ		
Search User							85 out of 8
John Martin				1	\oslash	Î	G
userTestAudit			•	/	\oslash	Î	G
GKTESTFOUR				/	\oslash	Î	G
GKTESTTHREE				/	\oslash	ii.	G
uhuihuhu				/	\oslash	Î	G
Buser				/	\oslash	Î	G

Options	Name	Description
1	Edit	Update/Edit the user specific details for a selected user
\oslash	Block the selected user	
Î	Remove	Remove the selected user from the user list
C	Reset Password	Reset password will be sent to the registered user email

Note:

- a. All the user specific details other than email id can be updated/edited by using the Update User page.
- b. If the new user is added to the Admin Group, the new user becomes admin.
- c. A user can be added to the multiple groups.

3.4.1. Default User Role

All the new users created via the User Management Module are added to a default role (the viewer role). The default user role restricts all new users from accessing any of the Platform plugins until they are added to some user group.

- i) Select 'User' option from the 'New' context menu.
- ii) The 'New User' form will open.
- iii) Provide the required information to create a new user.



New User	CANCEL	SAVE
Short Name "		
david		
		5 / 20
Full Name *		
David Brown		
		11 / 20
Description		
		0 / 150
Password "		
		8 / 16
Confirm Password *		
•••••		

iv) Provide the 'Custom Fields' details for the new user (If marked as mandatory).

New User	CANCEL	SAVE
Custom Fields		
Nationality USA		
State		
California		
City		
Sacramento		
Sacramento		
Manager		
Admin		
Department		
Platform		

v) Do not add the user to any group.

Add User to Group	
OSelected	+



vi) The user will be created and added to the list of users.

_	Туре		Status						_
	Enterprise	Ŧ	Active	*		ĄZ			
	Search User					S	howing 8	6 out of	86
	David Brown				/	\oslash	Û	С	*
	John Martin				/	\oslash	Ξ.	С	
	userTestAudit				1	\oslash	Î	С	

vii) Login to the platform through the new user's credentials.

Welcome to Big Data BizViz (BDB)	
david brawnýsbdbrzvíz.com	Decision Platform
	Big Data Pipeline Framework
Forgot password?	Dashboard Designer
Enterprise +	ETL (Self-Service Data Preparation)
	Geospatial Analysis (Location Intelligenc
	Predictive Analysis
	Play (Beta Release)
Login	Self-Service BI (Business Story)
	Social Media Browser
	Sentiment Analysis
Copyright © 2015-2017 BDB (BizViz Technologies Pvt Ltd)	Survey

viii) The new user can access the platform home page, but not the platform plugins.

BBB Platform	, en el construcción de la const	Þ	?	•
▼ My Documents	Home	a Lt Ore	c 🔲	

Note: The BizViz Platform provides some category of users (as explained below):

- 1. Viewer Role: Any user created under the BizViz Platform will be assigned this role by default.
- 2. Admin Role: If a user created under the Default User Role is added in the Admin Group, the user will get the Admin Role.
- 3. Ordinary User Role: If the users created under the Default User Role is added to any group other than Admin Group, the user will be assigned the group-specific permissions.



3.5. User Status

This feature helps the administrator to identify the various status of system users and activate an expired user account.

- i) Navigate to the User Management page.
- ii) The following drop-down menus can be accessed from the page:
 - a. Type: It contains the following authentication types:
 - i. Enterprise
 - ii. Window AD
 - iii. CA PPM
 - b. Status: It contains the following user status:
 - i. Active
 - ii. Blocked
 - iii. Expired
 - iv. Deleted

User: Enterprise Type Status Enterprise Active	A <u>ʻ</u> Z				
Search User					
yashu	/	\oslash	Û	C	-
ANI	1	\oslash	Û	G	
Reshma khan	1	\oslash	Û	G	
usrRestykoth	1	\oslash	Û	G	
T two user	/	\oslash	Û	G	
usrResttbbio	1	\oslash	Û	G	
usrRestgqnhw	1	\oslash	Û	с	

Note: Users can select any combination of the above-mentioned filter values to display filtered/customized lists of users.

3.5.1. Activating an Expired User Account

- i) Select 'Expire' as the status option.
- ii) A list of all expired user accounts/ groups will be displayed.
- iii) Click 'Activate' 🗹 to activate a specific user/user group.
- iv) Click the 'Reset Password' option 🖸 to set a new password for an activated user.



User: Enterprise	Type Enterprise	 Status Expired 	ĄŻ	
Search User				
0				
Rajeev Thakur			~	G
Dev			3 🖂	G
Kamal Khan			~4	C
Teter			~	G
TOneUser			~	G
Savitha K			~	G
Roshan Raj			~	G

Note: By clicking 'Activate', an expired user account can be activated. The user can use the old password. However, when the 'Reset Password' option has been used, the user will be activated with a new password (In this case, the user will be redirected to set a new password).

4. Signing Out

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

- i) Click the 'User' icon **2** 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.