



How to Guide

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

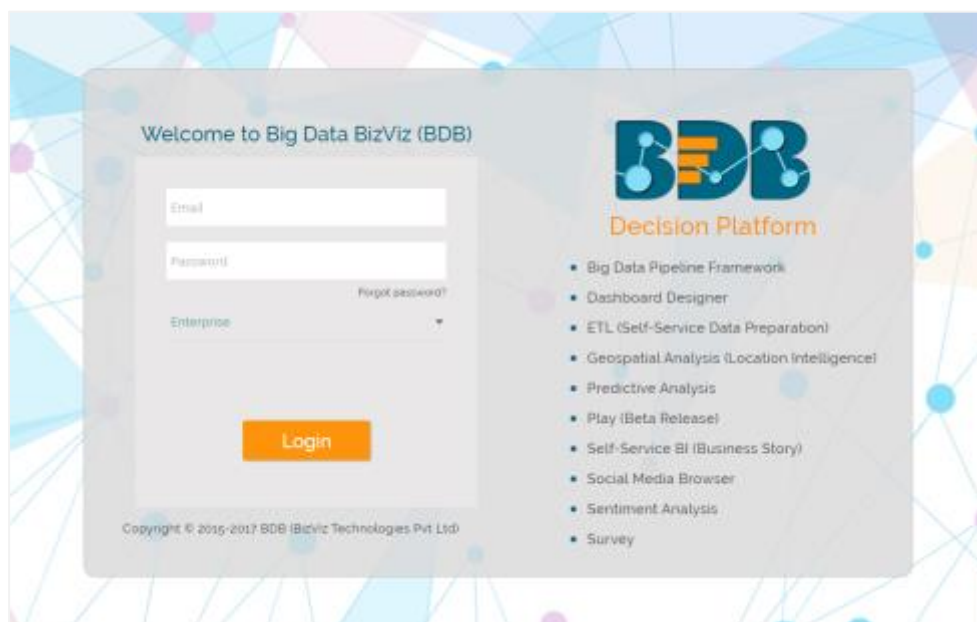
- o Browser that supports HTML5
- o Operating System: Windows 7
- o Basic understanding of the BizViz Server

3. Step-by-Step Process

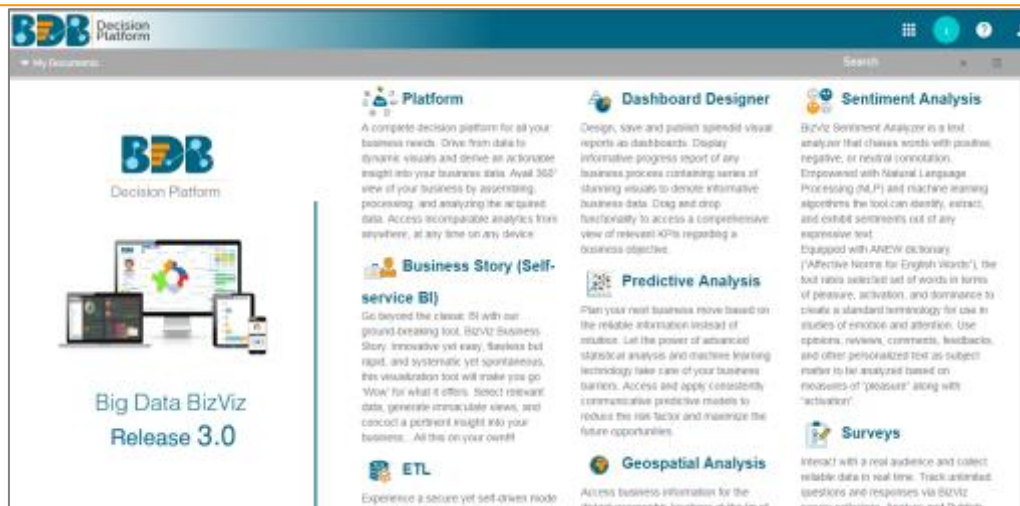
3.1. Accessing the BDB Platform

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

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



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

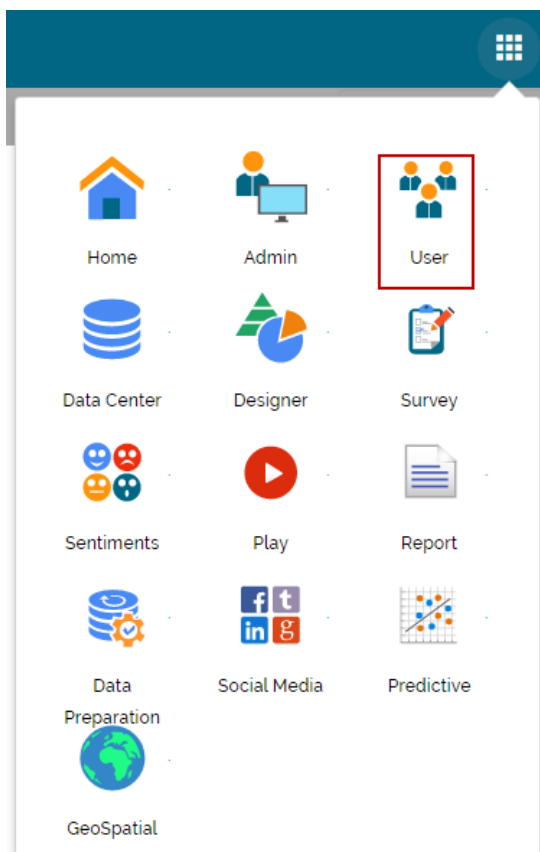


3.2. Accessing the User Management Page

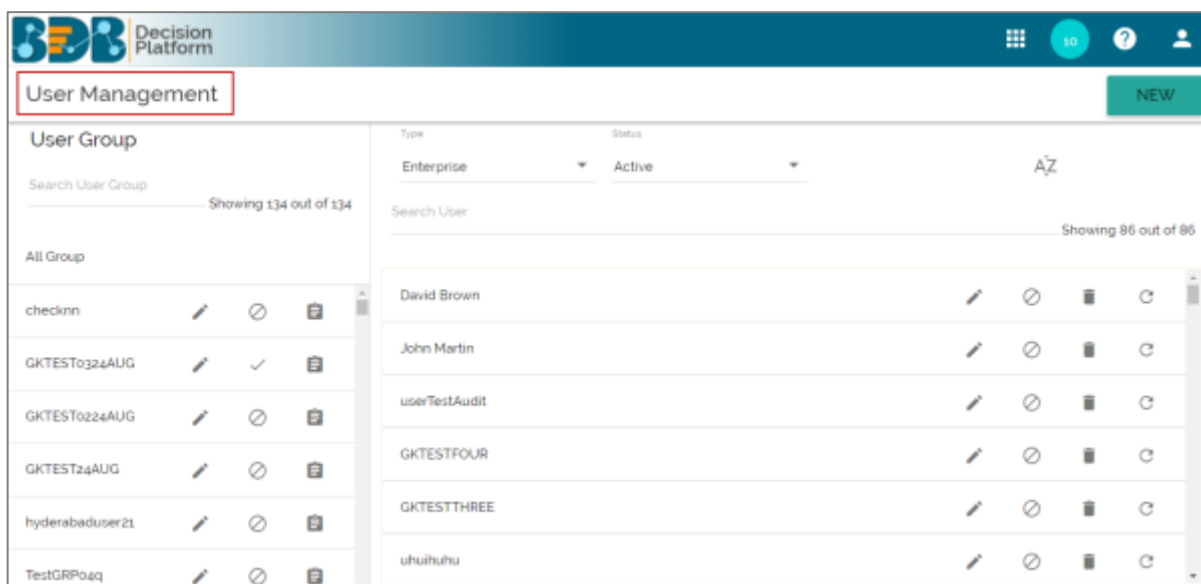
i) Navigate to the platform home page.

ii) Click the 'App' menu button

iii) Select 'User' option from the Apps menu.



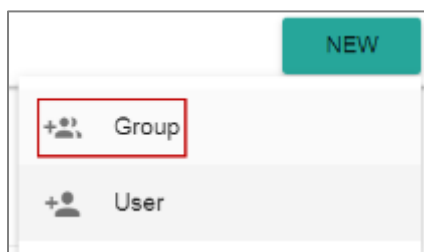
iv) Users will be redirected to the User Management page.




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

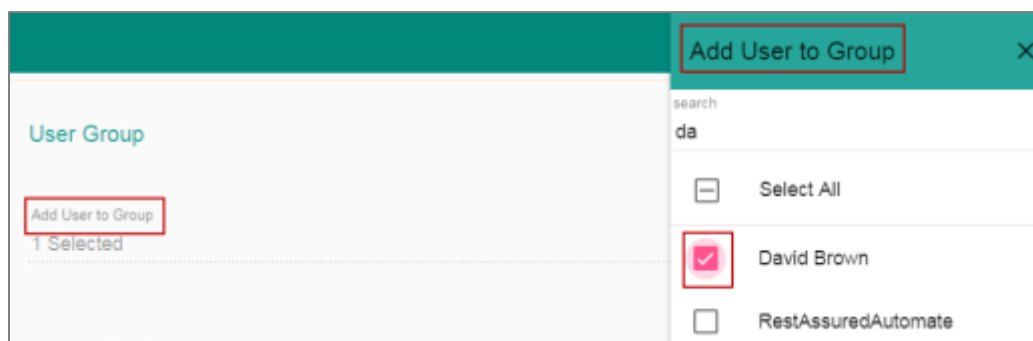
3.3. Creating a New User Group


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

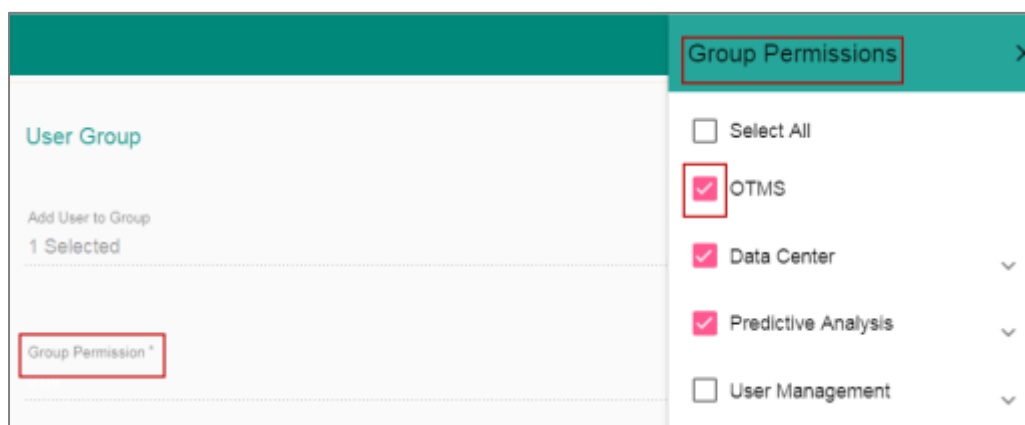



- iv) Provide the following information for a new User Group:
 - a. **Group Name:** Enter a name for the user group (Maximum provided word limit is 20 words)
 - b. **Description:** Describe the user group (optional) (Maximum provided word limit is 150 word)

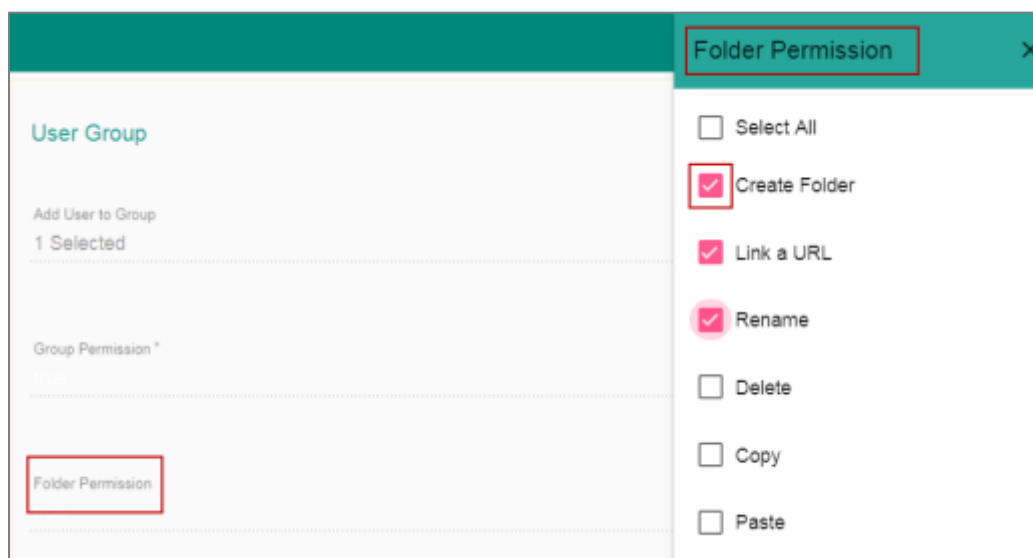
- c. **Add User to Group:** Click the 'Add' button  and select User(s) by check marking in the box from the pop-up window.



- 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).

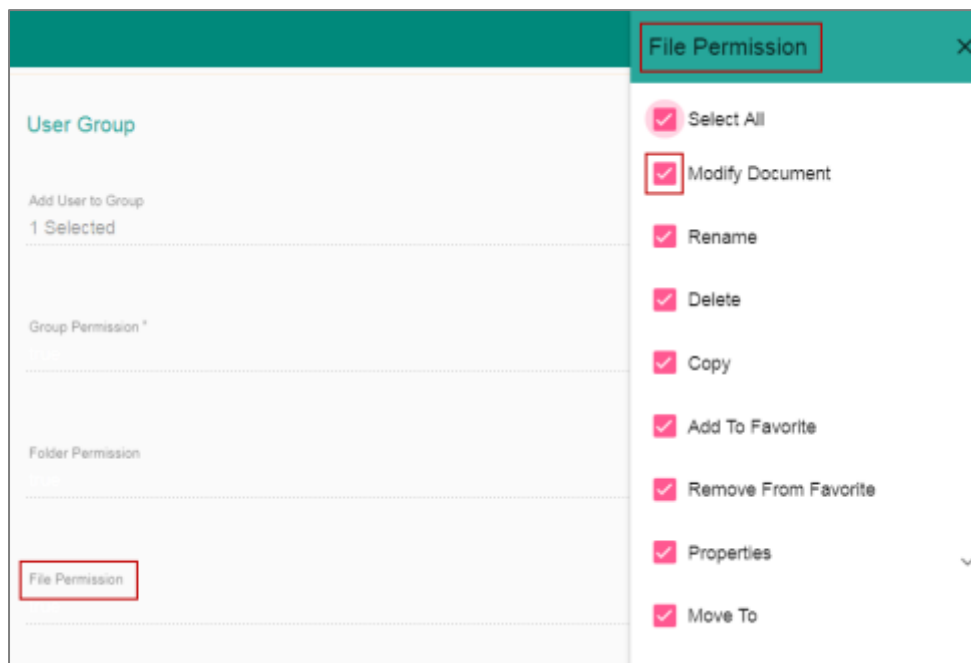


- e. **Folder Permissions:** Click the 'Add' button  provided next to the Folder Permission option. Assign various folder permissions to the User Group via the 'Folder Permission' pop-up window.







- 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.



- v) Click 'Save'
- vi) The newly created group will be listed under the User Group list (as shown below):

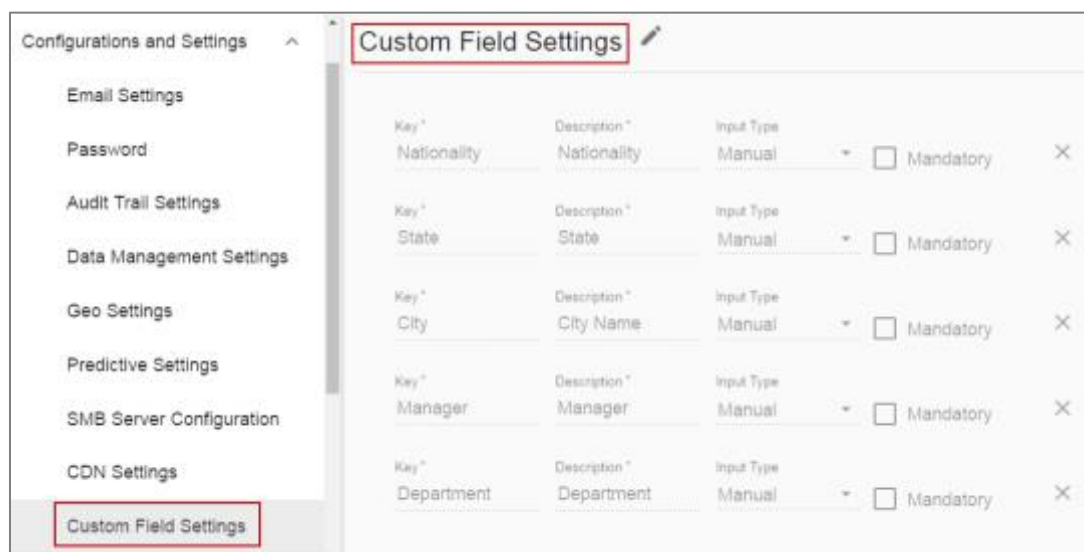
User Management			
User Group			
Search User Group		showing 68 out of 68	
All Group			
Sample User Group			
PermissionGrp17july			
usermanagement			
HYD BI			
GRPNEWTest			
NGroup14July			
Nandita			
GRPCATEST			


Option	Name	Description
	Edit	To edit details for the selected user group
	Activate Group	To activate the selected user group
	Block Group	To block the selected user group
	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.



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

Custom Field Settings

Key *	Description *	Input Type	<input type="checkbox"/> Mandatory	✕
Nationality	Nationality	Manual	<input type="checkbox"/> Mandatory	✕
State	State	Manual	<input type="checkbox"/> Mandatory	✕
City	City Name	Manual	<input type="checkbox"/> Mandatory	✕
Manager	Manager	Manual	<input type="checkbox"/> Mandatory	✕
Department	Department	Manual	<input type="checkbox"/> Mandatory	✕

[ADD FIELD](#) [CLEAR](#) [SAVE](#)

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

All Group

AngularSampleGroup	✎	✓	✕
Sample User Group	✎	⊗	
Sample Gr	✎	⊗	✕
Sample	✎	✓	✕
sample grp	✎	⊗	✕

Assign Custom Field To Group Users

Group Name

Sample User Group

Select Custom Field *

City ▼

Field value *

Bangalore

Select Users

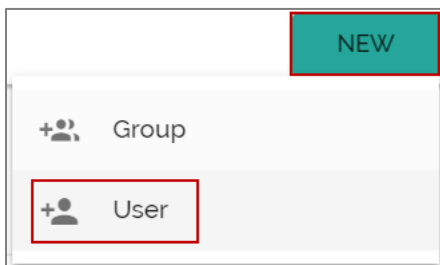
0 Selected +

[CANCEL](#) [SAVE](#)

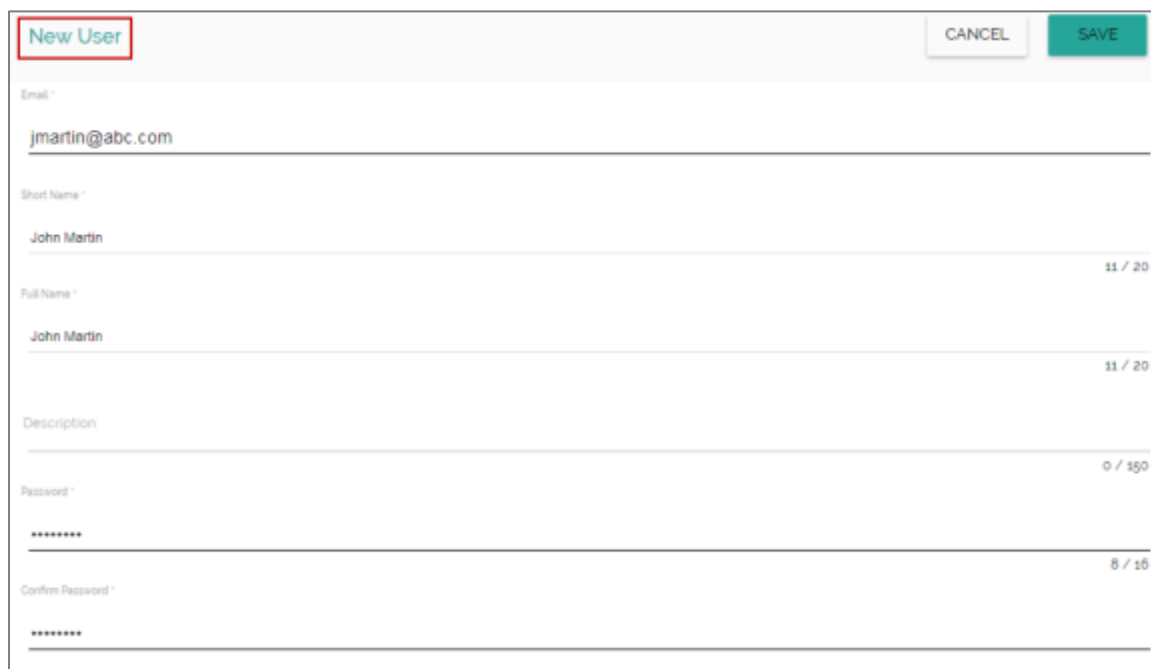
- vii) A message will pop-up to assure that the group custom fields are updated successfully.

3.4. Creating a New User

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



- 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




A screenshot of the 'New User' form. The title 'New User' is highlighted with a red box. The form contains the following fields:

- Email:** jmartin@abc.com
- Short Name:** John Martin (11 / 20 characters)
- Full Name:** John Martin (11 / 20 characters)
- Description:** (0 / 150 characters)
- Password:** (8 / 16 characters)
- Confirm Password:** (8 / 16 characters)

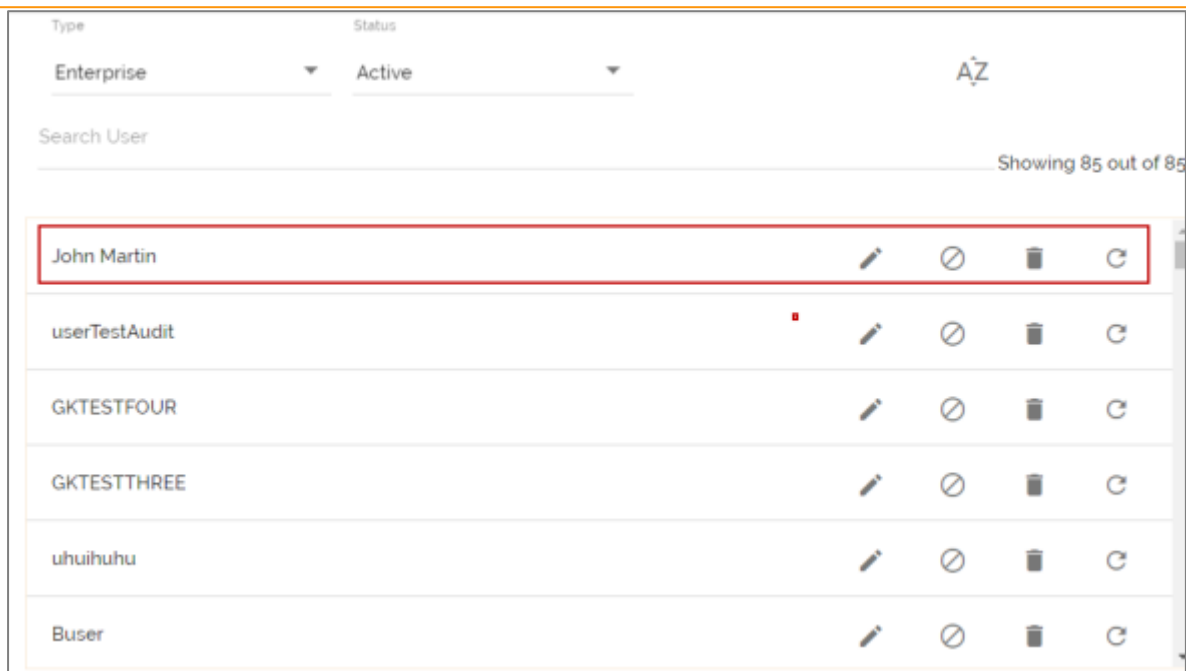
At the top right of the form, there are 'CANCEL' and 'SAVE' buttons.





- 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).

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'.

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



Options	Name	Description
	Edit	Update/Edit the user specific details for a selected user
	Block	Block the selected user
	Remove	Remove the selected user from the user list
	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

Manager
Admin

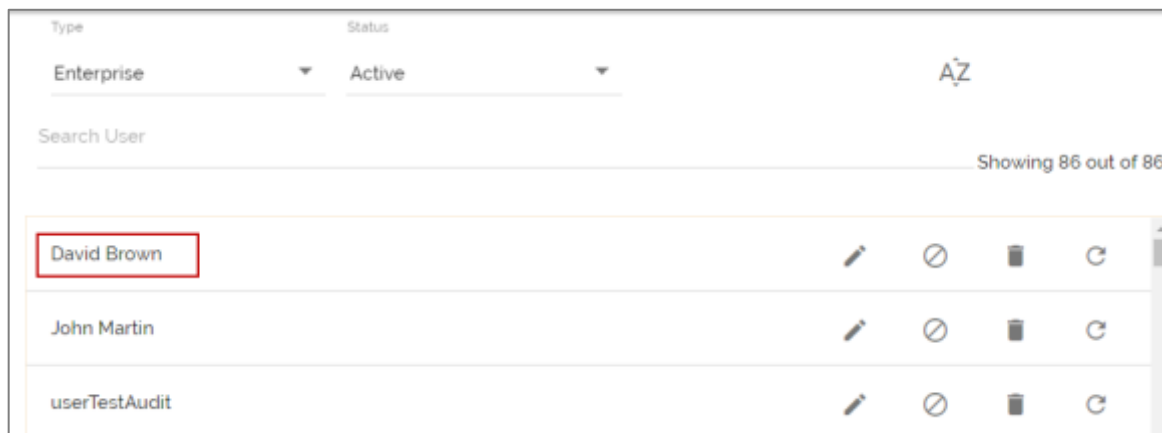
Department
Platform

v) Do not add the user to any group.

Add User to Group

0 Selected +

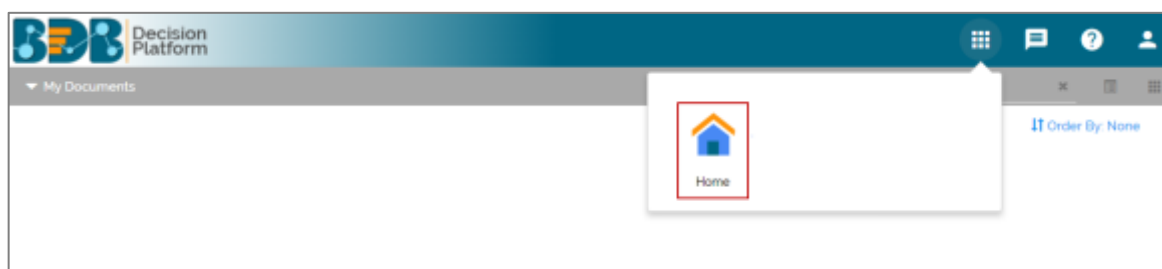
vi) The user will be created and added to the list of users.



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



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



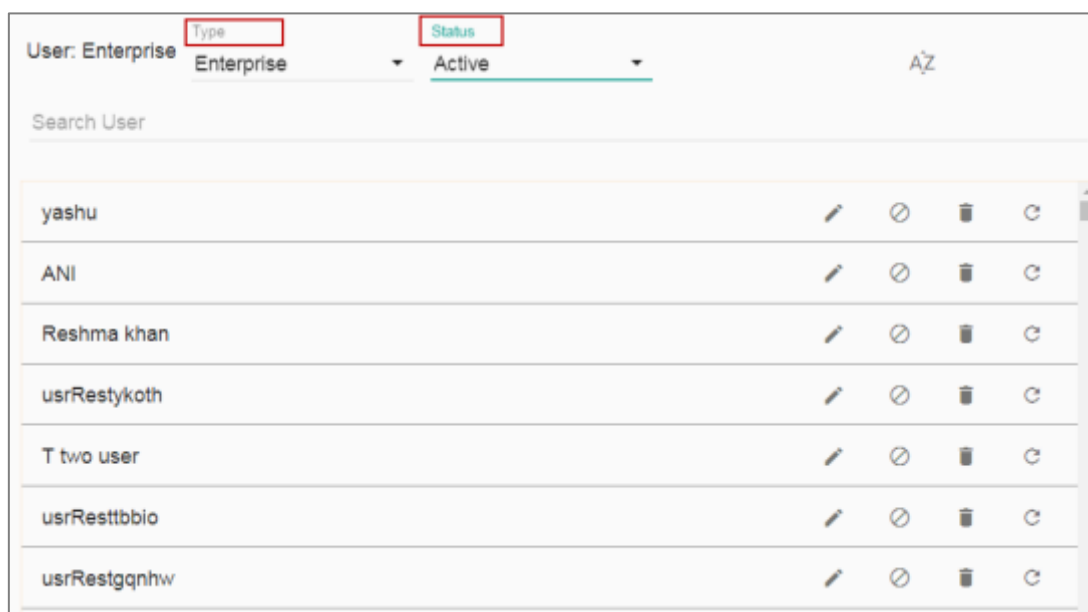
Note: The BizViz Platform provides some category of users (as explained below):

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



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	Status	
Enterprise	Enterprise	Expired 1	A-Z
Search User			
2	Rajeev Thakur	✓	⊗
	Dev	3 <input checked="" type="checkbox"/>	⊗
	Kamal Khan	✓ 4 <input checked="" type="checkbox"/>	⊗
	Teter	✓	⊗
	TOneUser	✓	⊗
	Savitha K	✓	⊗
	Roshan Raj	✓	⊗

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  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.