BizViz How-to-Guide

User Management

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Modified By	:	Varun JM





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1. Documesnt Purpose

The purpose of this document is to guide users on how to create new users, new groups and assigning users to the groups. In order to perfom the above mentioned actions, it is recommended to follow the step-by-step process given below.

2. Prerequisites

- Software
 - Browser that supports HTML5
 - Operating System: Windows7
- Basic understanding of the BizViz Server

3. Step-by-Step Process

Login to the Portal to access Data Management

- i) Enter in the URL bar →<u>http://www.bdibizviz.com/app/</u>
- ii) Enter your credentials to Login

The www.bdibizviz.com/app/index.html#		⊽ C ⁱ] Soogle	▶ ☆ 自 ♣ 余 ☰
	BIZVIZ		
	Email		
	Password		
	Enterprise	•	
	Login		
Co	pyrights © 2014 BDI Systems & Technologies Pvt Lto	d.All Rights Reserved.	

iii) Click on 'Login' to view the Portal Home Screen





Click on the 'Menu' button to display a list of the installed applications

Help	🔒 Home 💄 Avin Jain	\equiv
	and Administration	
	🚓 User Management	
	😂 Data Management	
	🔁 Business Views	
	₿⁄ Business Apps	
	🛵 Dashboard Designer	

iv) Click on 'User Management' plug-in available in the above figure (see above)



3.1. Adding New User

1. Click on menu 'User Management'

Menu> User Management

🗢 Cl 🔡 = Google 🔎 🟠 自 🕹 🏫 < 🛞 www.bdibizviz.com/app/index.html# ≡ siness Visualization • Help 🕆 Home 🔔 Demo My Docur ents 📴 Business Apps SupplyChain Industry 🖸 Business Views AutoMobile Industry Retail Industry 0 🚊 Data Management > Oil & Gas Industry nce Industry

Click on the 'User Management' button.

Business Visua Analyti	lization erviz	🔋 Help	🔒 Home	👤 Avin Jain	
🕇 AddUser	≣ListUser + AddGroup ≣ListGroup				
	User Management				
	This module contain the create, edit, list, update, block, activate operations of and user groups.	the user			

2. Creating a New User:

Click on the 'Add User' button.

Enter the following fields:

- 1. Email Enter valid email address of the user
- 2. Short Name Name of the user
- 3. **Full Name –** Detailed name of the user
- 4. Third Party User Option to synchronize third party user accounts
- 5. Description Any description related to user
- 6. Password- Secure authentication to access the account
- 7. Confirm Password Confirm the authentication by re-entering the password
- 8. **Custom Fields** Fields defined here can only be viewed by the user. (**Ex:** if the field is **'City'** with value **'Bangalore'** only Bangalore data is visible to user.

В	zV	IZ

Business Visua Analytic	s Platform	z		Help	🔒 Home	👤 Avin Jain	≡
+ AddUser	i ListUser	🕂 AddGroup	≣ ListGroup				
	New Us	er					-
		Email	Email				
		Short Name	Short Name				
		Full Name	Full Name				
		Third Party User	Third Party User				Ξ
		Description	Description				
		Password	Password				
		Confirm Password	Confirm Password				
		Custom Fields	+				

3. Click on 'Save Changes'

Example:

Business Visua Analytic	lization s Platform	2		😗 Help	🔒 Home	💄 Avin Jain	
🕇 AddUser	🗮 ListUser	🕇 AddGroup	≣ ListGroup				
	New Us	er					
		Email	ram.laksh@gmail.com				
		Short Name	Ram				
		Full Name	RamKumar 🗸				
		Third Party User	Kesav				
		Description	Description				
		Password	•••••••••				
		Confirm Password	······				
		Custom Fields	City Bangalore				





3.2. Add user Group to User

Click on the 'Drop Down tab' to view the existing groups:

Add User Group To U	ser		
User Group	None se	elected 🗸	
	Q Search		
	Select all		
	🔲 Admin Group		
	idppoc		
			Cancel Save changes

Select a group and click on 'Save Changes' to assign user to the selected group.

S.No.	Button	Button Name	Description
1	+ AddUser	Add User	Creates a New User
2	🗮 ListUser	List User	Displays list of all Users created
3	+ AddGroup	Add Group	Creates a new Group
4	Ⅲ ListGroup	List Group	Displays list of created Groups

Basic description of 'User Management' buttons:

3.3. List User

User Management>List User

Business Visual Analytics	Platform BIZVIZ					Help	🔒 Home	💄 Avin Jain	
+ AddUser	≣ ListUser	i ListGroup							
	User Details								Â
	Type Enterprise	•	User Status	Active	•				
	Show 10 • entries				Sear	ch:			
	User Name	•	Name	🔷 Created D	ate	\$	\$		
	avin.jain@bdbizviz.com		Avin Jain	2014-08-04	04:51:04.0	3	0 2		
	avin.Jain@bdbizviz.com demo.user@bdisys.com		Avin Jain Demo User	2014-08-04 (04:51:04.0 08:46:54.0	ž ž	© 4 © 4		Е



Lists ALL users details

1) The list can be filtered based on 'Account Type' and 'User Status'.

2) Administrators can Edit, Block, Delete, and Reset User Passwords.

Basic description of User Management 'Action' buttons:

S.No.	Button	Button Name	Description
1	2	Edit User Details	Used to edit the details of existing users
2	0	Block User	Blocks user from accessing the portal
3	•4	Delete user	Deletes User
4	<u></u>	Reset Password	Used to change the password

3.4. Add Group

User Management>+Add Group

This option performs the below mentioned actions

- 1. Creates New Groups
- 2. Add Users to Groups
- 3. Provide Group Permissions to Users

1. Creates New Groups:

Enter the Group name to create a group.

New Grou	0
Group Name	DevTeam
Description	Description

2. Add Users to Group

Select the users and click on '--->' to assign them to the created group.(see below)

Add Users to	Group			
lser List			Selected User List	
idpuser	*			
Varun		→		
Demo				
Kishore		▶		
Vishal				
Avin Jain				
Sachin		- 44		
Vimal				
	-			

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BizViz

to Group			
		Selected User List	
*	-	Sachin Vimal	
	►		
	+		
	*		
	to Group	to Group	to Group Selected User List

Selected users can be viewed under 'Selected User List'.

3. Provide Group Permissions

Users are not allowed to access all the applications. They can access the applications for which authorization are granted.



From the fig the enabled boxes indicates that users have permissions to access these applications. Click on **'Save Changes'** button to apply the changes.

3.5. List Group

List previously created groups with the options to 'Edit' and 'Block' them.

AddUser	🔳 ListUser	🕇 AddGroup	Ⅲ ListGroup		
	User Gi	roup Details	5		
	Show 10 • entries				Search:
	Name		Created Date	🛔 🛛 Last Updated Date	\$ (
	Admin Gro	oup	2014-08-13 07:26:00.0	2015-05-15 15:25:22.0	🖉 🥸
	idppoc		2015-04-24 08:25:16.0	2015-04-24 08:25:16.0	Ø 🕸
	Showing 1 t	o 2 of 2 entries			Previous 1 Next

Basic description of List Group 'Action' buttons:

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