

BizViz How-to-Guide

User Management

Version : 1.00
Description : Release Version
Date : 19 May 15
Modified By : Varun JM

Business Visualization
Analytics Platform





Table of Contents

- 1. Documesnt Purpose 2
- 2. Prerequisites 2
- 3. Step-by-Step Process 2
 - 3.1. Adding New User 4
 - 3.2. Add user Group to User 6
 - 3.3. List User..... 6
 - 3.4. Add Group 7
 - 3.5. List Group 8





1. Document 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 perform the above mentioned actions, it is recommended to follow the step-by-step process given below.

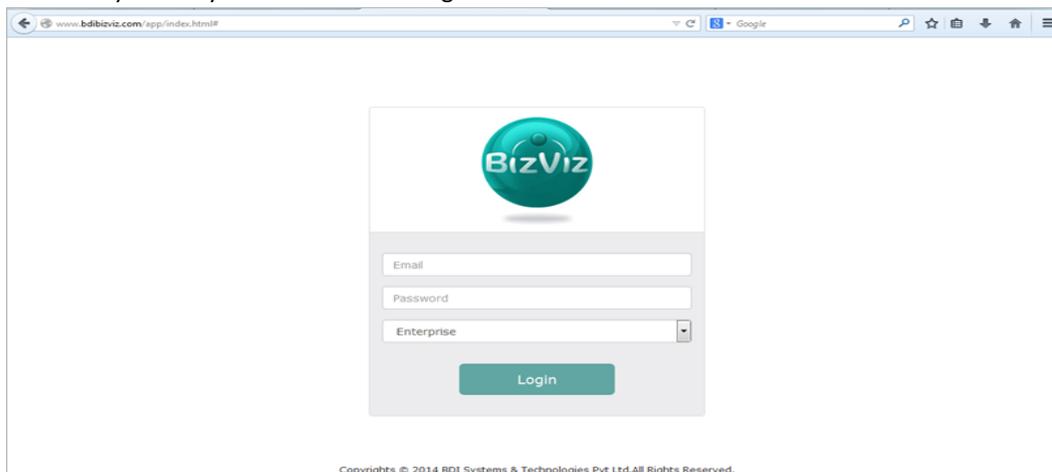
2. Prerequisites

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

3. Step-by-Step Process

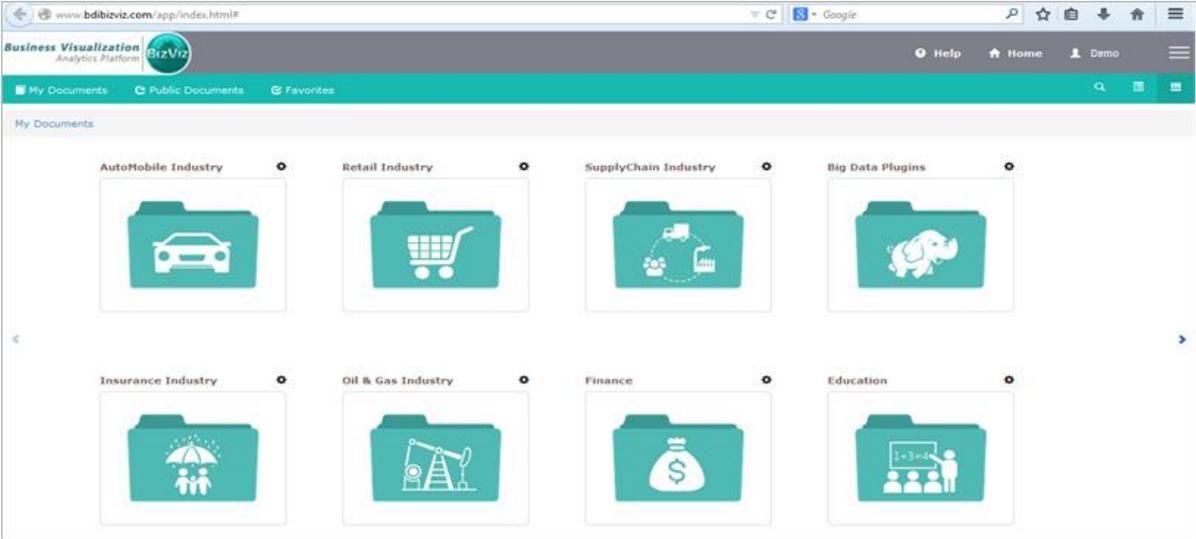
Login to the Portal to access Data Management

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

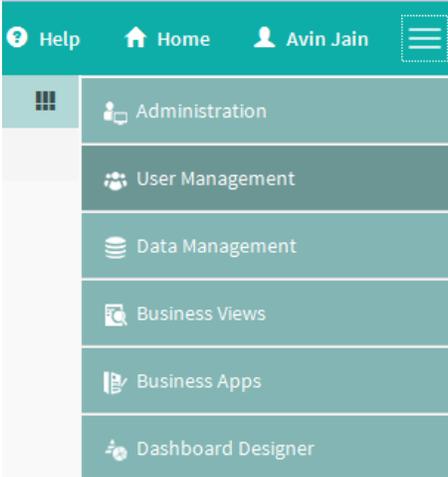


- iii) Click on **'Login'** to view the Portal Home Screen





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



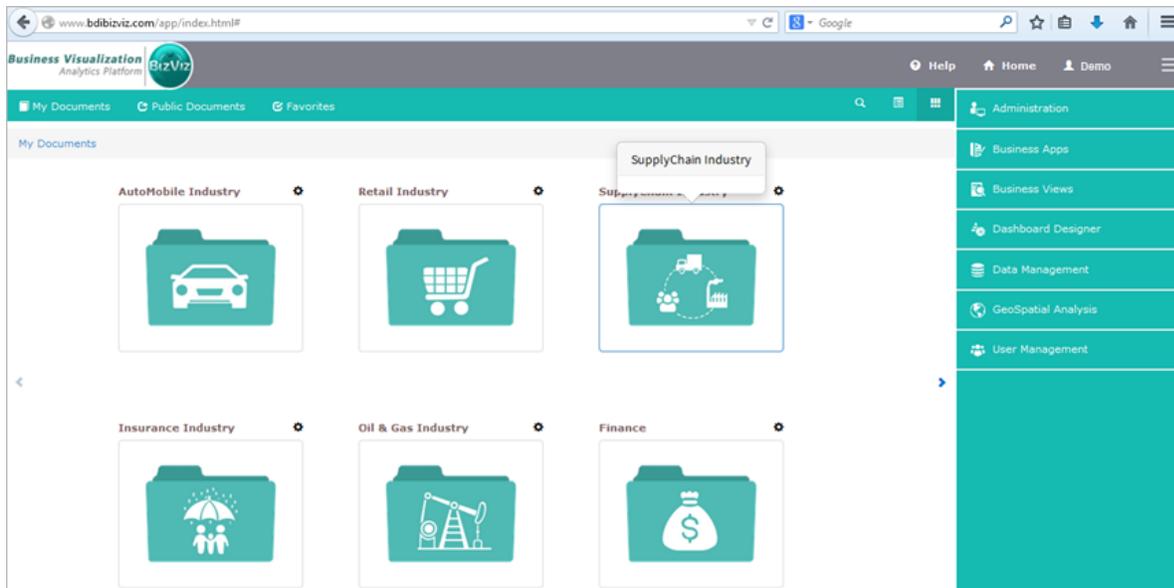
iv) Click on 'User Management' plug-in available in the above figure (see above)



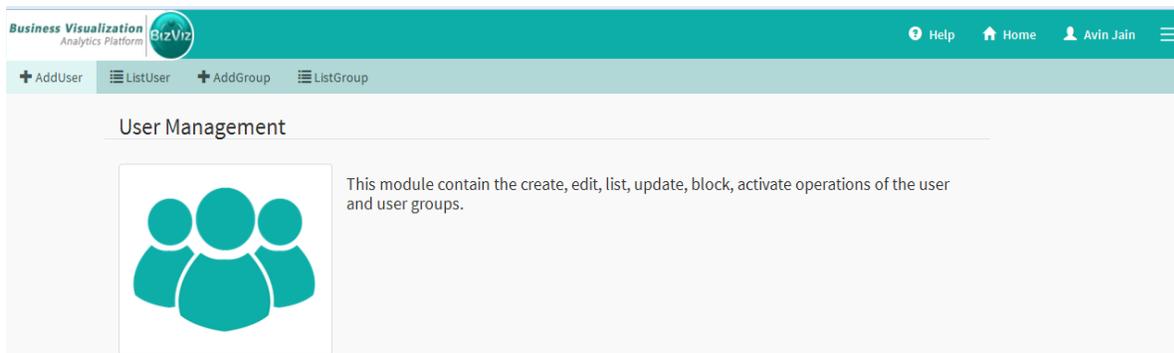
3.1. Adding New User

1. Click on menu 'User Management'

Menu> User Management



Click on the 'User Management' button.



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.)



Business Visualization Analytics Platform **BizViz** Help Home Avin Jain

+ AddUser ListUser + AddGroup ListGroup

New User

Email

Short Name

Full Name

Third Party User

Description

Password

Confirm Password

Custom Fields

3. Click on 'Save Changes'

Example:

Business Visualization Analytics Platform **BizViz** Help Home Avin Jain

+ AddUser ListUser + AddGroup ListGroup

New User

Email ✓

Short Name ✓

Full Name ✓

Third Party User

Description

Password ✓

Confirm Password ✓

Custom Fields





3.2. Add user Group to User

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

Add User Group To User

User Group None selected ▾

- Select all
- Admin Group
- Idppoc

Cancel Save changes

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

Basic description of 'User Management' buttons:

S.No.	Button	Button Name	Description
1		Add User	Creates a New User
2		List User	Displays list of all Users created
3		Add Group	Creates a new Group
4		List Group	Displays list of created Groups

3.3. List User

User Management>List User

Business Visualization Analytics Platform

Help Home Avin Jain

+ AddUser ListUser + AddGroup ListGroup

User Details

Type: Enterprise User Status: Active

Show 10 entries Search:

User Name	Name	Created Date	
avin.jain@bdbizviz.com	Avin Jain	2014-08-04 04:51:04.0	
demo.user@bdisys.com	Demo User	2014-10-29 08:46:54.0	
kishore.kumar@bdisys.com	Kishore Kumar	2014-09-01 13:53:53.0	



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		Edit User Details	Used to edit the details of existing users
2		Block User	Blocks user from accessing the portal
3		Delete user	Deletes User
4		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 Group

Group Name

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

User List

- idpuser
- Varun
- Demo
- Kishore
- Vishal
- Avin Jain
- Sachin
- Vimal

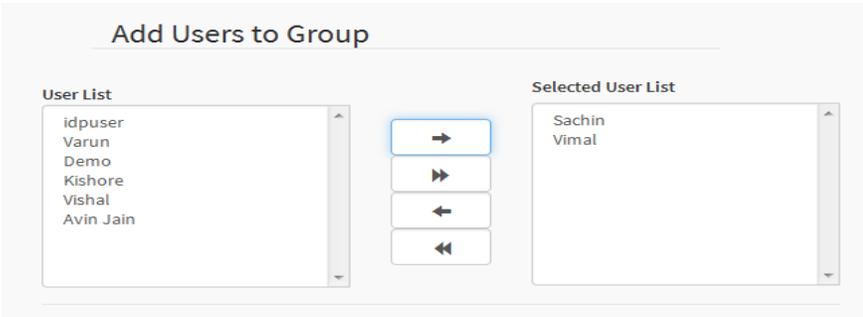
→

➡

←

⬅

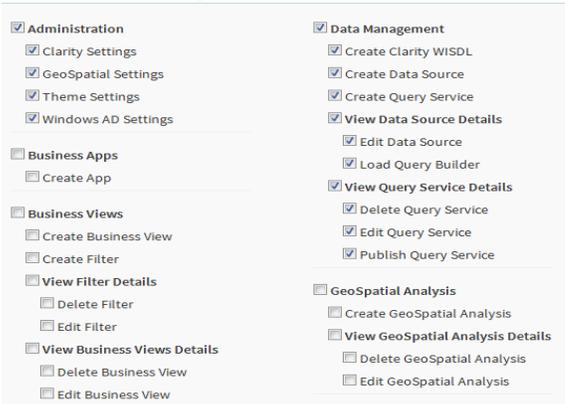
Selected User List



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

3. Provide Group Permissions

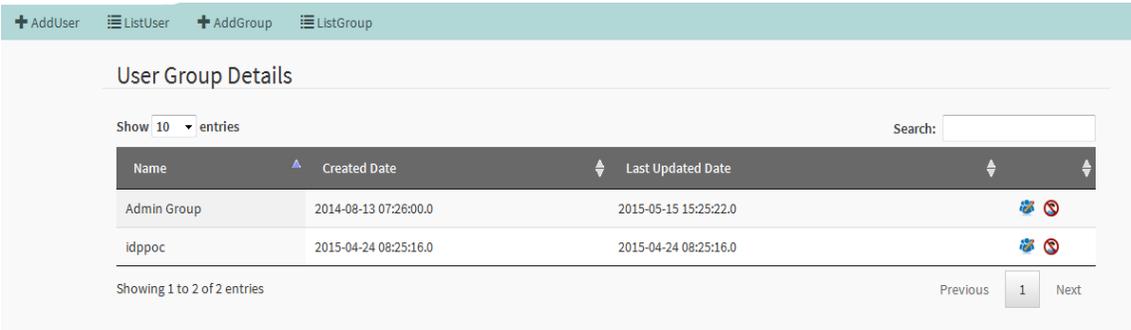
Users are not allowed to access all the applications. They can access the applications for which authorization are granted.



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.



Basic description of List Group 'Action' buttons:



S.No.	Button	Button Name	Description
1		Edit User Details	Used to edit the details of existing users
2		Block User	Blocks user from accessing the portal

