

BizViz Platform Admin Console

BizViz Platform 1.0

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1. About this Guide

1.1. Document History

The below table gives an overview of the most recent document changes.

Product Version	Date (Release date)	Description
BizViz Platform 1.0	June, 2015	First Release of the document

1.2. Overview

This guide covers detailed description for deployment and configuration of the BizViz Platform.

It explains contextual and conceptual details describing the administrative tasks and features.

1.3. Target Audience

This guide is aimed at system administrators who install, establish, and manage BizViz Business Intelligence platform.

2. Getting Started with the BizViz Platform

2.1. Introduction to the BizViz Platform

BizViz is a uniquely designed adaptive enterprise platform that empowers any user comfortable with Excel to play role of an analyst. It distinguishes relevant data and displays it in a condensed way even though, data floods in from the multiple sources and various forms. Data analysis and subsequent reports are combined in such a way that their integration benefits users to see appealing graphical patterns into their data and take quick decisions. It allows active participation from the users for profound data exploration and visualization providing meaningful insights. It enables analysts to provide Descriptive, Diagnostic, Predictive, and Prescriptive analytics in the cloud, on mobile devices, and on premise.

2.2. Installation Prerequisites and Supported Devices

Prerequisites for Deployment of the BizViz Platform

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

Supported Devices

- Web/ Tablet Browser



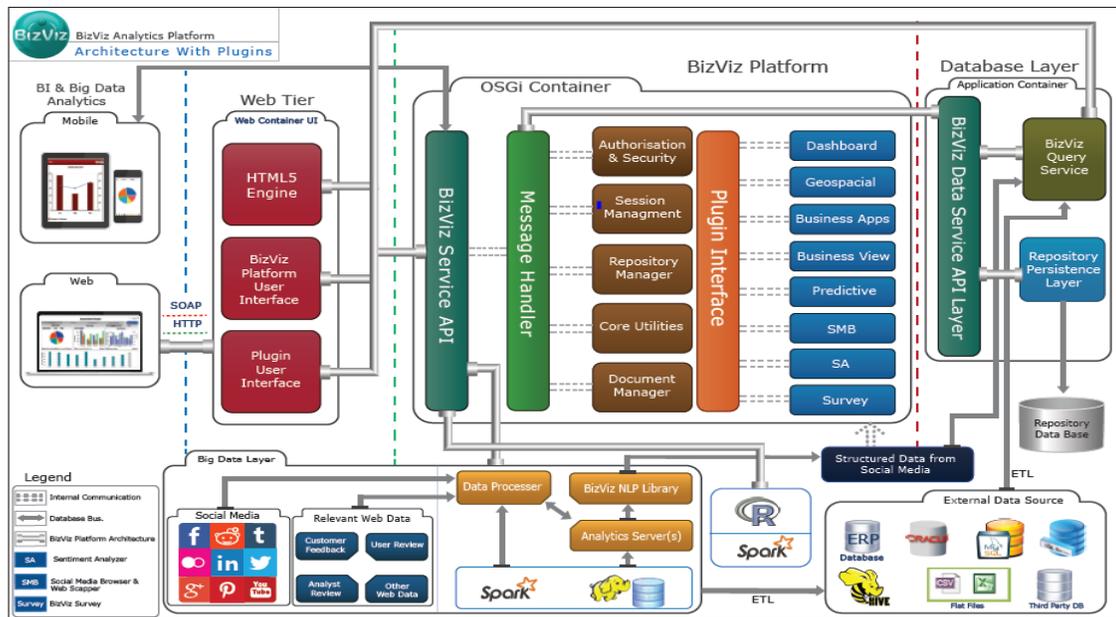
3. Architectural Overview

This part describes the architecture platform, system, and database that build the BizViz Portal. The major purpose of the platform is to manage different dashboards and database connections online. It allows to create a web service using the available database connections. The created web service can then be utilized by integral designer in the platform.

Big Customers containing multiple branches can easily manage data of different branches by creating an individual space for each branch using this platform. However, they can also view the information collected from the different branches in the form of dashboards. Customers can directly access and perform operations on their individual databases.

This document is intended to capture and convey the significant architectural decisions, behind the designing and building of the Platform. It is a method by which System’s architect and others involved in the project can understand the problems and find out a way to solve them.

BizViz Platform has a highly scalable, n-tier client-server architecture that serves mobile clients, web clients, and desktop-installed software.

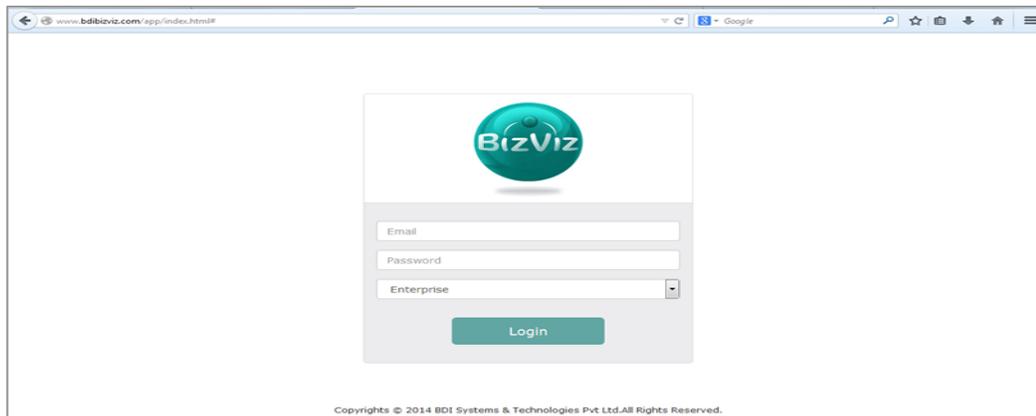


4. BizViz Platform overview

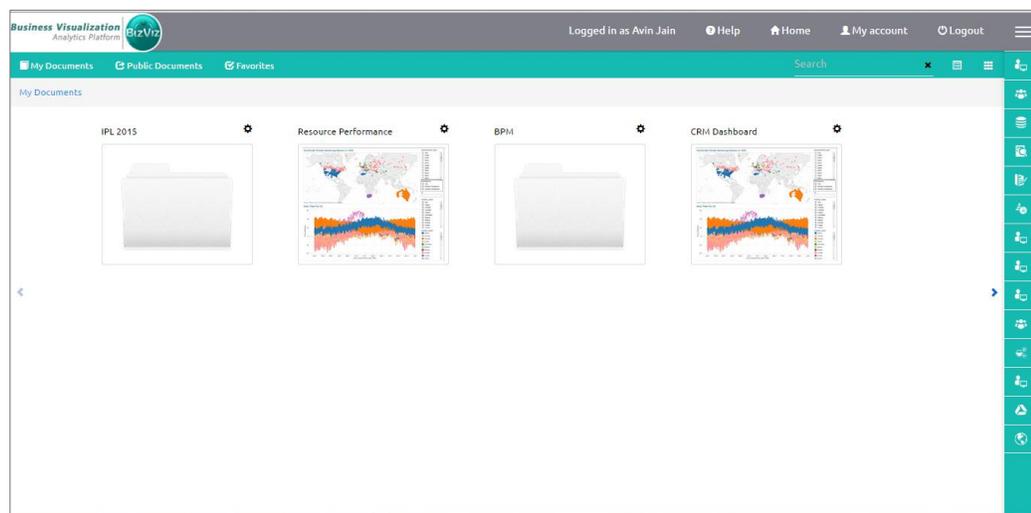
4.1. Accessing BizViz Platform

User can follow a step by step process given below to access the BizViz Platform and access the variety of plugins.

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



iii) Click on '**Login**' to access Platform Home Screen



4.2. BizViz Platform Home Screen

BizViz Platform Home Screen redirects the users to access various applications and features installed under the platform. It also displays information about the user and list of documents accessible to the user.

4.2.1. Header Panel

The header panel of the BizViz Platform displays the user name who has logged in and contains various menus.

The header panel contains the following menus:

- **Help Menu:** It provides access to the BizViz Platform help documents.
- **Home Menu:** It redirects to the BizViz Platform Home Screen.
- **My Account Menu:** User can edit the basic information, set preferences, change password, Set API token access & set mobile device access.
- **Logout:** User can logout from the Platform by clicking on it.
- **Plugin Menu:** It provides access to various management options and installed applications under the platform.

4.2.2. Available Lists of Documents

Home screen displays the list of following documents.

- **My Documents**
 - **'My Documents'** lists all the documents created by the user or assigned to the user.
 - The documents are displayed as thumbnails.
- **Public Documents**
 - Public Docs are documents, dashboards, business reports, and business views accessible via the internet.
 - Public Document folder is available by default. User can view documents which are available in this folder and share any document which the user wants to be available for all users.
- **Favorites**
 - The documents listed as favorite by the user are stored under **'Favorites'**
 - User can add or remove documents listed under **'Favorites'**

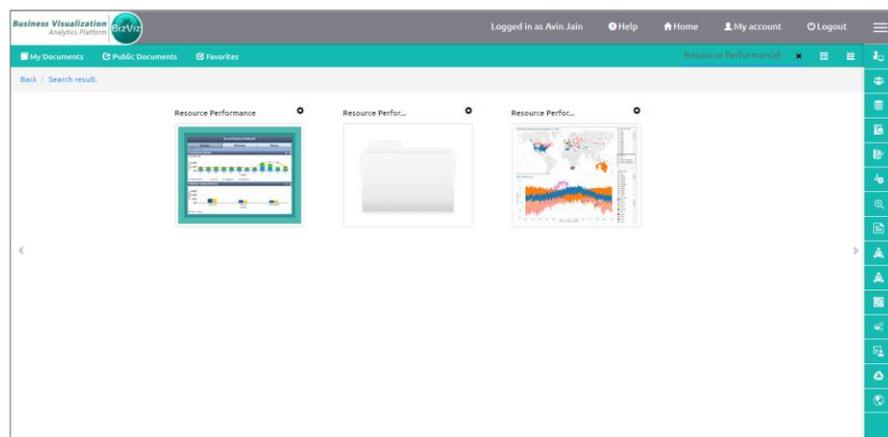
Note:

My Documents opens by default while opening the BizViz Platform Home Screen.

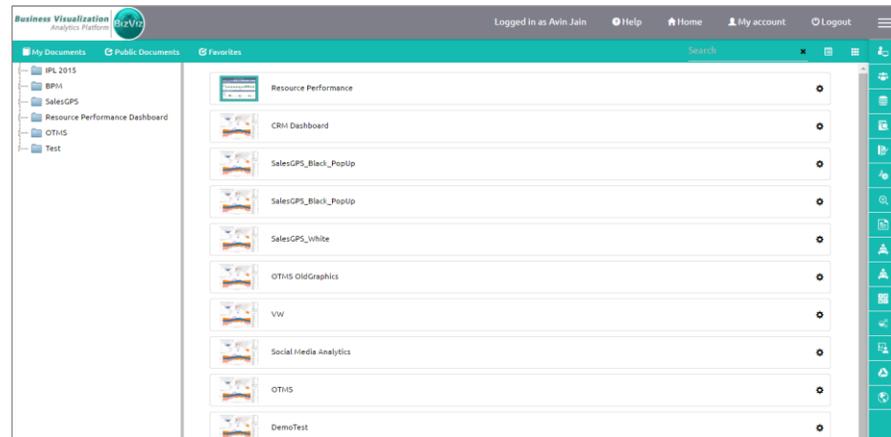
4.2.3. Search, List View and Grid View

- **Search:** It enables to search any existing document by typing the title of the document in the given search space
 - i) Go to the **'Platform Home Screen'**
 - ii) Enter title of the document in the **Search** space
 - iii) All the documents entitled the same name will be displayed

E.g. All the existing documents entitled Resource Performance are displayed in the below mentioned image.



- **List View:** It is used to display a list view of all the existing documents under BizViz Platform. The list view resembles the tree structure.
 - i) Go to the **'Platform Home Screen'**
 - ii) Click on 
 - iii) A list view of all the documents will be displayed



- **Grid Panel:** It is used to display a grid view of all the existing documents under BizViz Platform. By default, all the documents on the Platform Home Screen are displayed in Grid view.
 - i) Go to the **'Platform Home Screen'**
 - ii) Click on 
 - iii) A Grid view of all the documents will be displayed



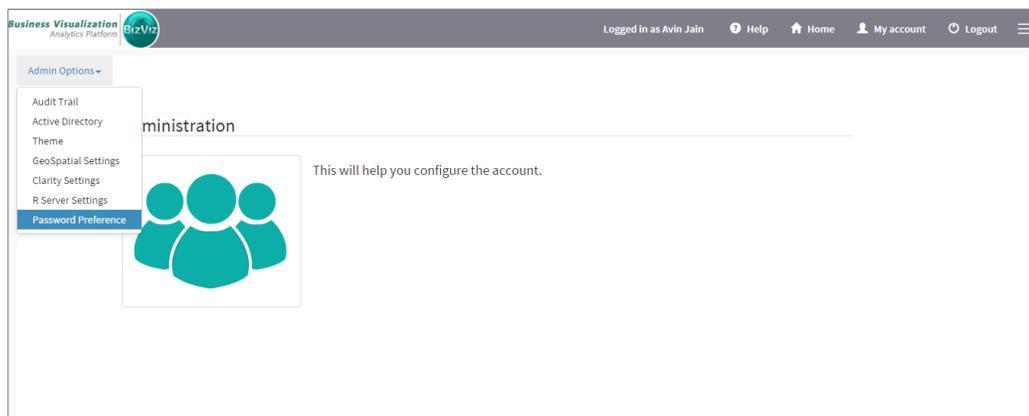
5. Administration

5.1. Accessing Administration Option from the Platform

Administration is the first option provided in the list of applications under BizViz Platform. User can access this option from Platform Home Screen.

5.2. Accessing Admin Options

- i) Click on '**Administration**' option provided on the Plugin Menu.
- ii) A new page opens with '**Admin Options**'
- iii) Click on '**Admin Options**' to access various options for administrative tasks under the platform



5.3. Admin Options

There are 7 major admin options provided under Administration module:

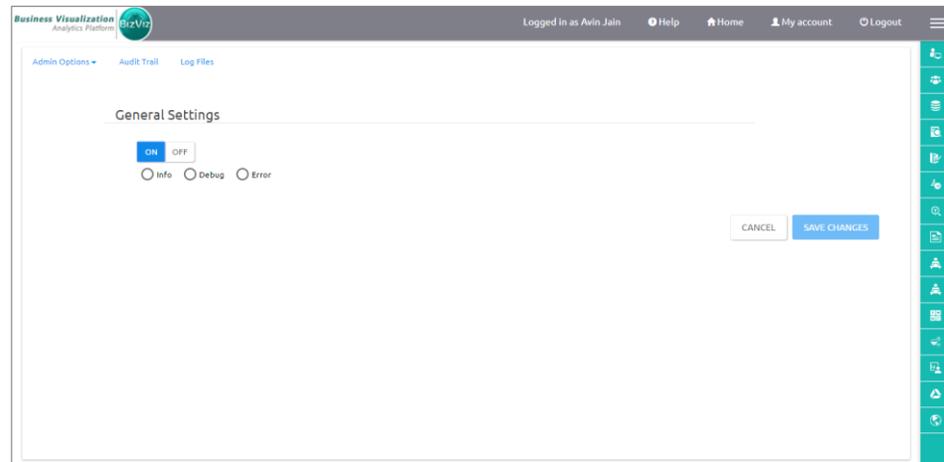
1. Audit Trail

Audit Trail allows administrator to keep a record of significant events on servers and applications, which helps give a picture of what information is being accessed, how it's being accessed and changed, and who is performing these operations.

Clicking on '**Audit Trail**' will redirect to two options:

a. General Setting

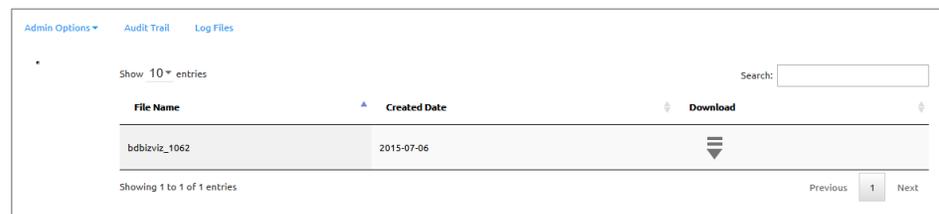
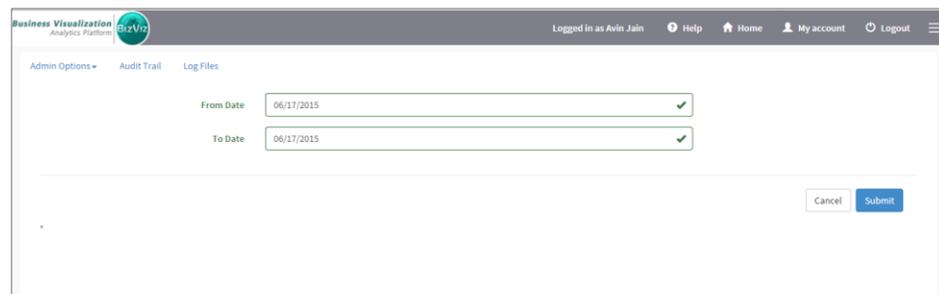
- i) Admin can enable or disable Audit Trail using '**On**' or '**Off**' option from general settings
- ii) Admin can select any one of the following depending on the requirement:
 - **Info**: It captures information about all the events.
 - **Debug**: It enables the admin to debug the errors.
 - **Error**: It helps admin to identify the errors so that they can be fixed
- iii) Click on '**Save Changes**'



b. Log Files

A Log file is a record of messages between different users of a communication software or events that occur in an operating system while a software runs. Logging is the act of keeping a log. In the simplest example, requests and responses are written in a single log file.

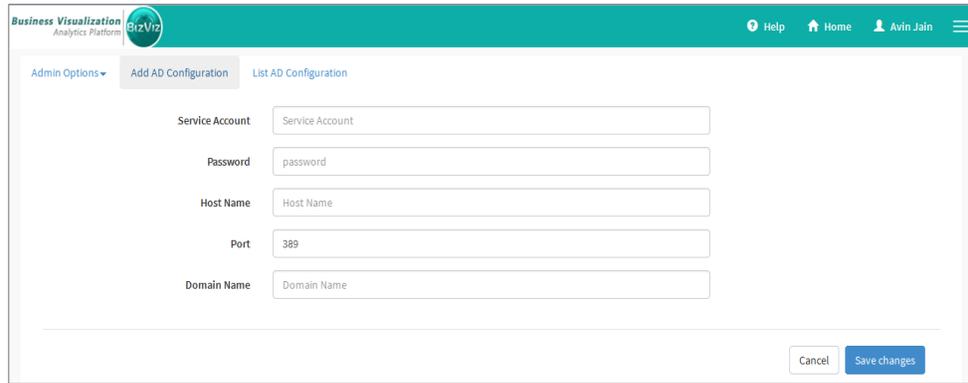
- i) Enter '**From Date**' and '**To Date**'
- ii) Click '**Submit**'
- iii) It will redirect to the list of all available log files.
- iv) Click on the download icon to download the log file for detailed review.



2. Active Directory

Clicking on '**Active Directory**' will redirect to two options

a. Add AD Configuration



Enter the following fields:

- **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** – the part of a network address which identifies it as belonging to a particular domain

b. List AD Configuration

- Click on the '**List AD Configuration**' to view the previously created Active Directory (AD) configurations:



url	domainName	Created Date
No data available in table		

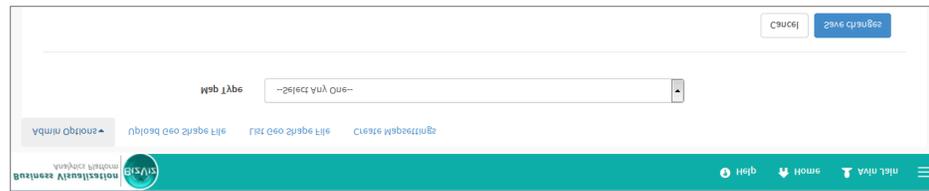
- A list of previously created Active Directory AD configurations display
 - **url**: URL link
 - **Domain Name**: the part of a network address which identifies it as belonging to a particular domain
 - **Created Date**: Date when the AD was created

3. Geospatial Settings

Geospatial settings include the below given steps to modify a geospatial file:

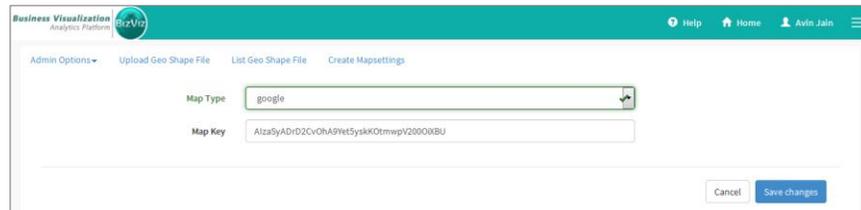
a. Creating Map Setting

- Select '**Geospatial Settings**' from the list of Admin Options
- Click on the '**Create Map Settings**'
- Select Map type (from the drop down menu)
- Click on '**Save Changes**'

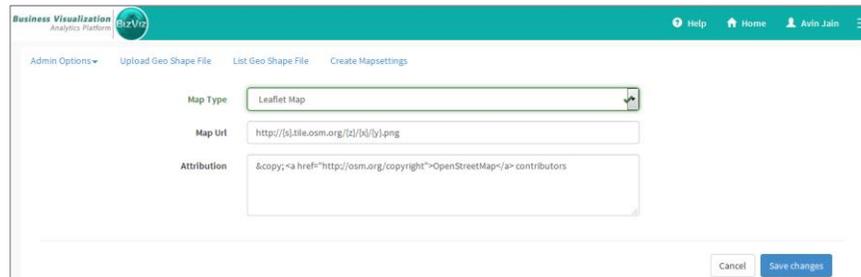
**Note:**

Map Type provides only two options by default:

- **Google Map**– Maps provided by Google (need to purchase map key from Google)
 - i) Click **'Create Map Settings'**
 - ii) Select **'google'** from the pull down menu
 - iii) Enter **'Map Key'** (Map key is the license key provided by Google)

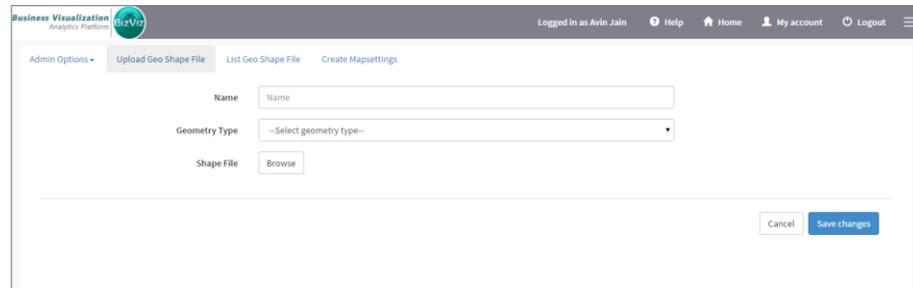


- **Leaflet Map** – Open-source maps
 - i) Click **'Create Map Settings'**
 - ii) Select **'Leaflet Map'** from the pull down menu
 - iii) Enter the following fields
 - **Map Url:** URL of the selected map (provided by the open-source vendors)
 - **Attribution:** Configuration parameters for the map (provided by the open-source vendor)

**b. Uploading a Geo Shape File**

- i) Select **'Geospatial Settings'** from the list of Admin Options
- ii) Select **'Upload Geo Shape File'**
- iii) Enter the following fields:
 - **Name:** Title for the map
 - **Geometry Type:** Select anyone Geometry type from the pull down menu

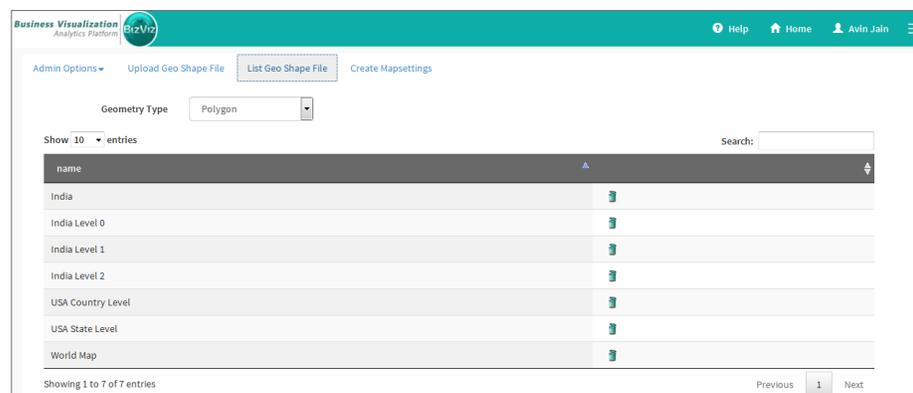
- **Shape File:** Navigate to file location and select the file (Files with only 'json' and 'js' format are supported)



iv) Click on 'Save Changes'

c. List Geo Shape File

- Select 'Geospatial Settings' from the list of Admin Options
- Select 'List Geo Shape File'
- List of all the previously created Geo Shape Files appear based on the 'Geometry Types'



name	
India	
India Level 0	
India Level 1	
India Level 2	
USA Country Level	
USA State Level	
World Map	

4. Clarity Settings

It is required to follow two-step process to configure clarity settings.

a. Add Clarity Configuration

- Select 'Clarity Settings'
- Click on 'Add Clarity Configuration'
- Enter the required details
 - **Clarity Server:** URL details of Clarity Server(ex: http://dashboards.xyz.com)
 - **User Access NQUERY:** Name of the Query that will fetch a list of Clarity users.
- Click on 'Save Changes'



b. List Clarity Configuration

A list of all the previously created Clarity configurations is displayed under this segment. It includes details like,

- **url:** URL link
- **Bind Name:**
- **Created Date:** Date when Clarity was configured
- **Action:**

5. R Server Setting

- i) Select ‘Admin Options’ from the Administration segment
- ii) Click on ‘R-Server Settings’
- iii) Fill in the following fields:
 - **IP Address:** IP address of the server where R is deployed
 - **Port:** Port number of R-Server
 - **User Name:** User name of the server where R is deployed
 - **Password:** Password of the server where R is deployed
- iv) Click on ‘Save Changes’



6. Password Preference

Preferences for a proper password are described under **Password Strategy**. User need to consider the below given aspects while setting or configuring a password:

- i) Click on '**Admin Options**'
- ii) Select '**Password Preference**'
- iii) Click on '**Password Strategy**'
- iv) Fill in the required details
 - **Password Expiry:** Time limit provided in days for password validity
 - **Password Strength:** Password should include minimum 6 characters (It must have combination of alphabetical letters, numerical figure, and a special character E.g. Admin1@)
 - **User Password Reuse:** User can't reuse last three passwords set by him as a new password
 - **No of User Login Failure:** It indicates number of chances provided to the user for logging in with wrong passwords

The screenshot shows the 'Password Strategy' configuration page in the BizViz Admin interface. The page is titled 'Business Visualization Analytics Platform' and shows the user is logged in as Avin Jain. The configuration fields are as follows:

Field Name	Value
Password Expiry	30
Password Strength	6
User Password Reuse	3
No of User Login Failure	3

Buttons: Clear, Save changes

Note:

- a. If the user fails to enter correct password for 3 times, the system user/administrator will block him.
- b. The user can login with the same password only when the system user/administrator enables the user again.

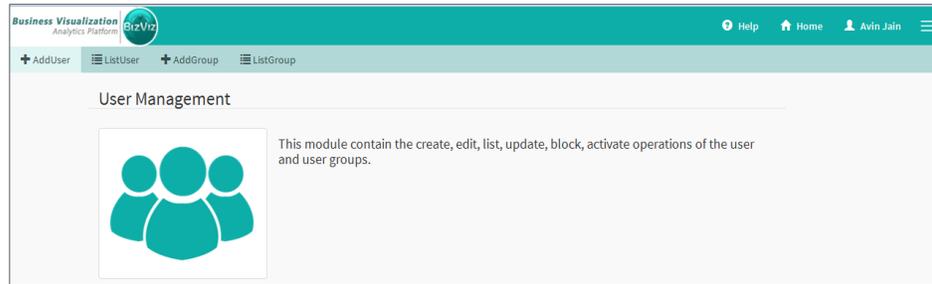
6. User Management

6.1. Add User

When you add a new user, you need to specify personal and login information. Creating New User Account is a two-step process.

6.1.1. Adding a New User

- i) Select '**User Management**' plugin
- ii) Clicking on '**User Management**' will redirect you to User Management Home Screen

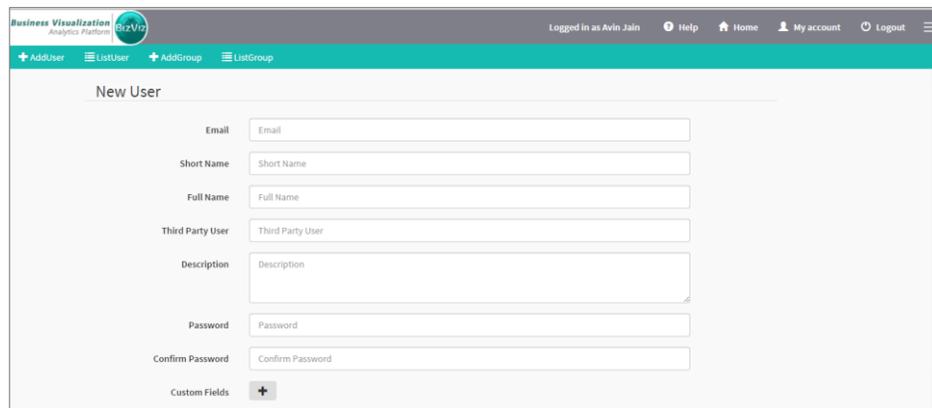


iii) Click 'Add User'

iv) The platform updates with new user screen

v) Enter the following fields for the new user:

- **Email** – email address
- **Short Name** – Nickname
- **Full Name** – Full name of the User
- **Third Party User** – Optional. Used when synchronizing a Clarity user with BizViz portal
- **Description** – A description (note/memo) regarding the user
- **Password**– Password to be assigned to the new user
- **Confirm Password** – Confirm the above password

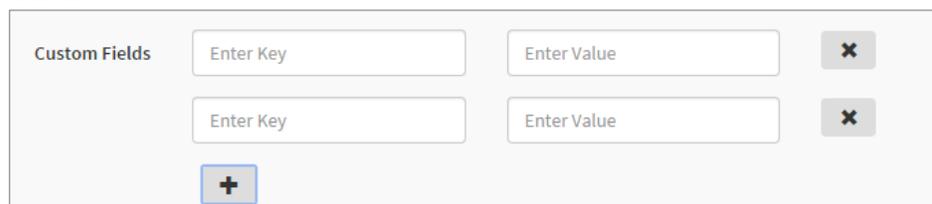


vi) Click  to add custom fields

- Enter Key
- Enter Value

Note:

Custom Fields can be used to limit the data the user will have access to in dashboards.

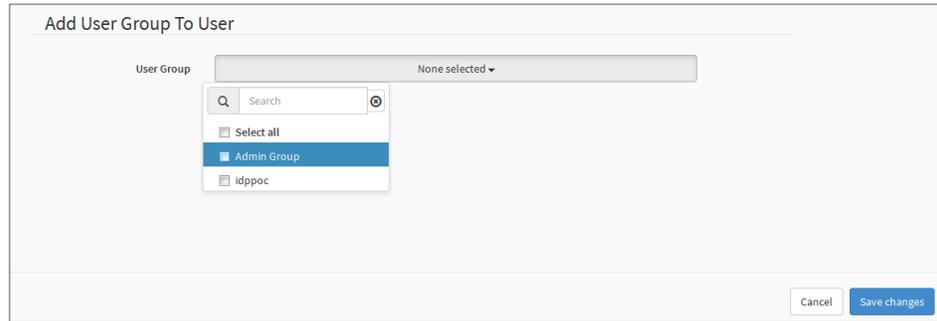




6.1.2. Adding User Group to the User

This section describes how to assign a user to a group or groups.

- i) Select **'Add User Group To User'**
- ii) The list of all users appear under user group pull down menu
- iii) Click on the **'Drop Down'** menu to view the existing groups:



- iv) Select the group(s) you wish to assign the new user
- v) Click on **'Save Changes'**.

Basic description of **'User Management'** buttons:

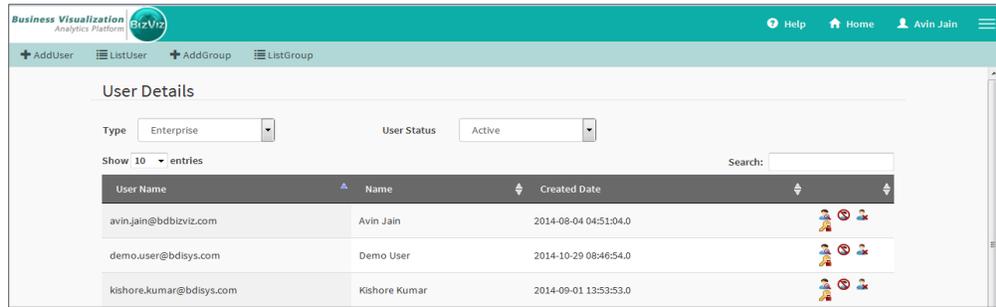
Sl. No.	Button	Button Name	Description
1	AddUser	Add User	Creates a New User
2	ListUser	List User	Displays a list of all Users created
3	AddGroup	Add Group	Creates a new Group
4	ListGroup	List Group	Displays list of created Groups

- vi) A new user is added to the platform and the administrator can now assign him different access permissions, privileges, and options for the user to interact with the platform.

6.2. List User

Follow the below given step by step process to view the list of users.

- i) From the User Management home screen, click on **'List User'** button.
- ii) All user details will be displayed.
- iii) User details in the **'List User'** includes,
 - Email id (User Name)
 - Name
 - Created date (with mention of time)



- The list can be filtered based on ‘Account Type’ and ‘User Status’.
- Administrators can **Edit, Block, Delete** users, and **Reset User Passwords**.
Basic description of User Management ‘Action’ buttons:

Sl. No.	Button	Button Name	Description
1		Edit User Details	Edit user details
2		Block User	Blocks user from accessing the portal
3		Delete User	Deletes user
4		Reset Password	Resets password

6.3. Add a New Group

- i) From the User Management home screen, click on ‘Add Group’ button.
- ii) This section includes the below mentioned steps to complete the process of adding a new group:

1. Create a New Group
2. Add Users to a Group
3. Assign Permissions to a Group

Step-1 Create a New Group:

- iii) Enter a group name and description to create a new group



New Group

Group Name

Description

Step-2 Add Users to Group

iv) Select user(s) and click on '-->' to assign them to this group

Add Users to Group

User List		Selected User List
idpuser Varun Demo Kishore Vishal Avin Jain Sachin Vimal	→ →→ ← ←←	

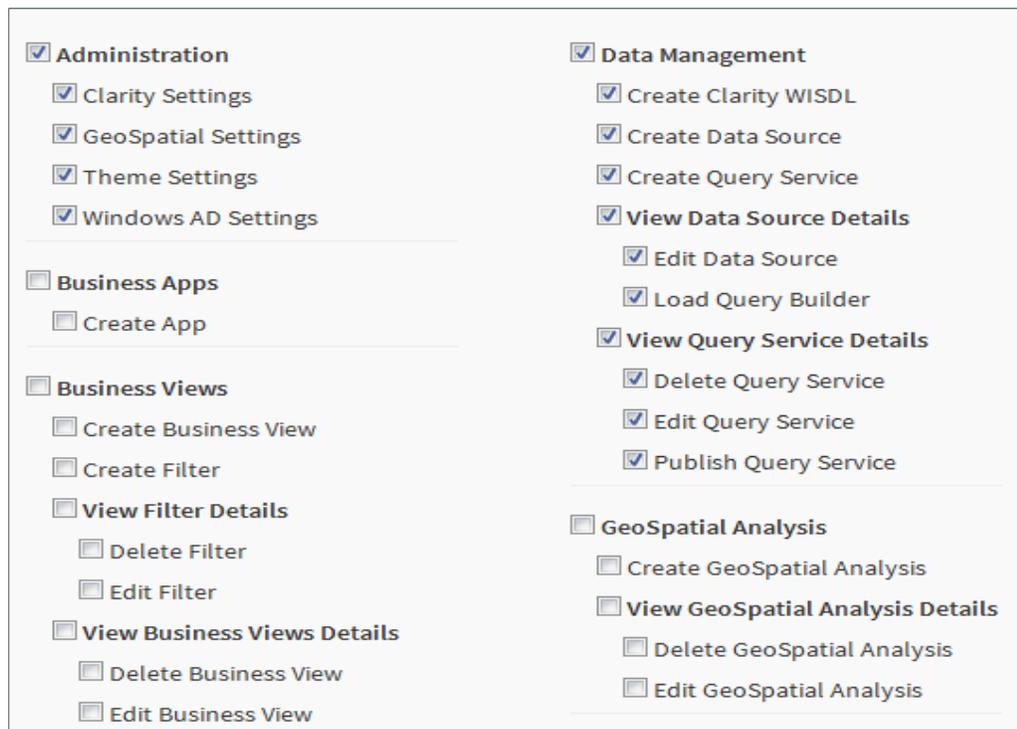
v) Selected users can be viewed under 'Selected User List'.

Add Users to Group

User List		Selected User List
idpuser Varun Demo Kishore Vishal Avin Jain	→ →→ ← ←←	Sachin Vimal

Step-3 Assign Group Permissions

vi) Users' access to applications can be controlled by enabling/disabling the check-boxes provided.

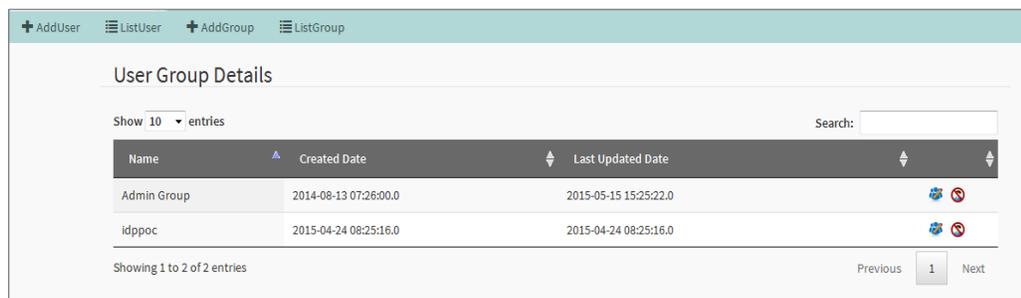


- vii) Click on **'Save Changes'**
A new group of user or users is added to the platform.

6.4. List Group

This segment displays a list of all the existing groups of users. It lists previously created groups with the options to **'Edit'** or **'Block'** them.

- i) From the User Management home screen, click on **'List Group'** button.
- ii) All group details will be displayed
- iii) Group details in the **'List Group'** includes,
 - **Name:** Name of the created group
 - **Created Date:** Date and time of creation of the group
 - **Last Updated Date:** Date and time when the group was last updated
 - **Action buttons:** Actions to be performed by the administrator

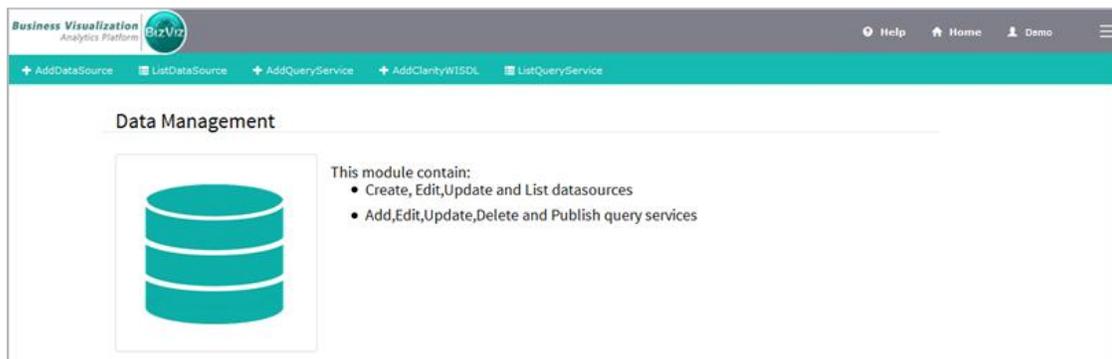


Basic description of **'List Group'** Action buttons:

Button	Button Name	Description
	Edit User Details	Edit user details
	Block User	Blocks user from accessing the portal

7. Data Management

User can add multiple data source and create Query services by on top of it by using this module.



7.1. Creating a Data Source

- i) Click on the '**Add Data Source**' button
- ii) Enter the following fields:
 - **Data Source Name** – A user defined name to identify the data source
 - **User Name** – Should be the same as given in the connection server
 - **Password** - Should be same as given in the connection server
 - **Description** – Connection details/description
 - **Host Name/ IP** –The server database IP address
 - **Port** – The server port number
 - **Database name** –The name of the database where the data will be stored
 - **Database type** – The type of database that the data will be stored in (ex. MYSQL)



The screenshot shows the 'New DataSource' form in the BizViz platform. The form is titled 'New DataSource' and contains the following fields:

- Datasource Name:** Data Source Name
- User Name:** User Name
- Password:** Password
- Description:** Description
- Host Name/IP:** Host Name/IP
- Port:** Port No.
- Database Name:** DataBaseName
- Database Type:** MySQL

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save changes'.

iii) Click on 'Save Changes'

Example:

The screenshot shows the 'New DataSource' form in the BizViz platform, filled out with example data. The fields are:

- Datasource Name:** Test ✓
- User Name:** [Redacted] ✓
- Password:** ***** ✓
- Description:** Description
- Host Name/IP:** [Redacted] ✓
- Port:** 3306 ✓
- Database Name:** bdi_demo_datamart
- Database Type:** MySQL ✓

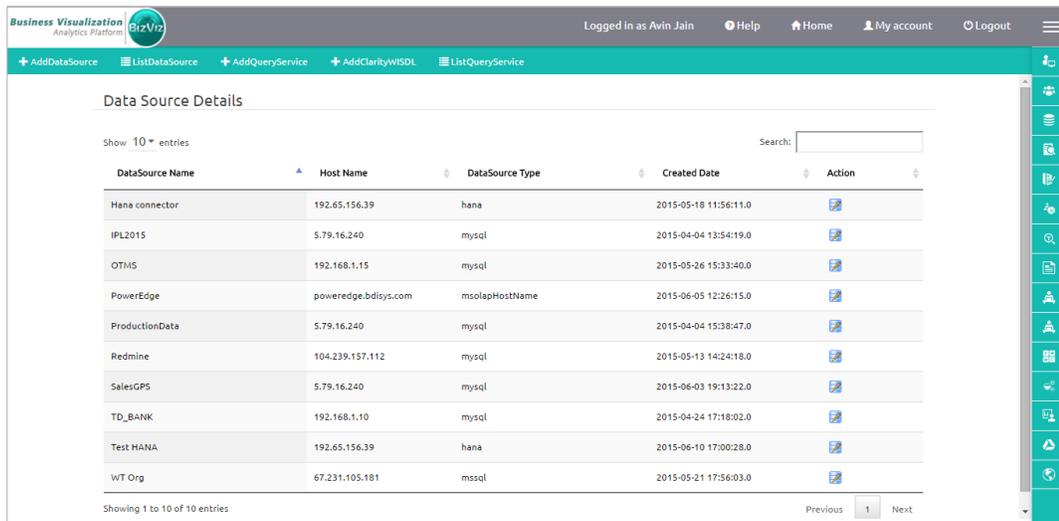
At the bottom right of the form, there are two buttons: 'Cancel' and 'Save changes'.

7.2. Steps to View the Created Data Sources

i) Click on 'List Data Source' button to view the existing data sources:

ii) 'List Data Source' includes following details

- **Data Source Name:**
- **Host Name:**
- **Data Source Type**
- **Created Date**
- **Action:**



Administrator can perform the following actions on an existing data source from the 'List Data Source'

- i) Edit a data source using the 'Edit data source'  button.
- ii) Use 'Search' bar to search for a particular data source.

Basic description of "Data Management" buttons:

S.No.	Button	Button Name	Description
1		Add Data Source	Creates a database connection
2		List Data Source	Displays list of all data connections created
3		Add Query Services	Creates a query to retrieve data from database
4		Add Clarity WISDL	Allows data retrieval from CA Clarity
5		List Query Services	Displays list of all queries created

7.3. Creating a Query

- i) Enter required details in the fields:
 - **Services Name:** User can give the suitable name for the query service
 - **Data Source Name:** Select a data source from the drop-down menu
 - **Database Name:** Select a database name from the drop-down menu
 - **Query:** Write your query
 - **Description:** Any descriptive information related to the query



New Query Service

Service Name: Query Service

Data Source Name: None selected ▾

Database Name: None selected ▾

Query: Enter Query

Description: Description

Cancel Save changes

Example:

Edit Query Service

Service Name: AccID_Rev

Data Source Name: BDI Internal Data ▾

Database Name: bizviz_1062 ▾

Query: select Distinct AccID from [10878982_RevenueForm] where AccName = @accname@ order by AccID

Description:

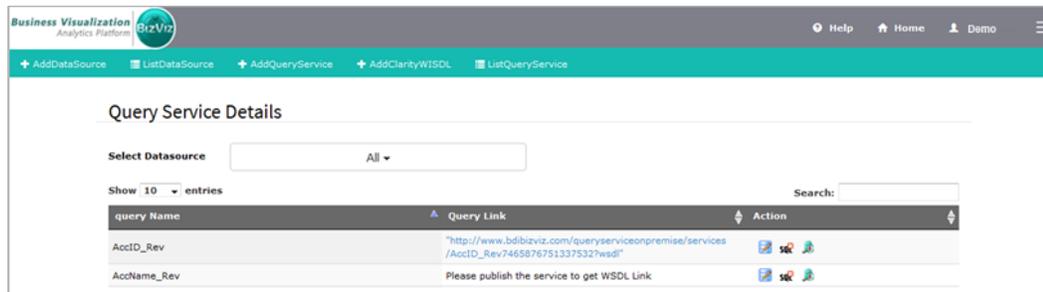
Cancel Save changes

Rules to follow when creating queries:

- Table names should be in [] brackets
- Variables should be within @'s. (ex. @user_name@)

7.4. Publishing a Query

- Click on the 'List Query Service' icon from the Data Management Home Screen
- Select a Data source from the drop-down menu
- Click on the 'Publish Query Service'  icon under the 'Actions' column for the query you wish to publish
- Click on the link which has now been generated under 'Query Link' column as shown in the below image
- Click on the 'Publish' button  to publish the query.

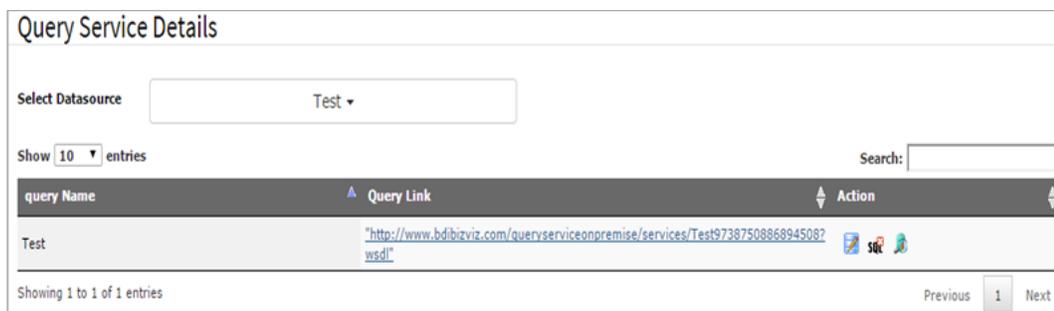


Note:

When the link which is generated under ‘**Query Link**’ column is clicked, an XML page should be generated. That will confirm that query is valid. If an XML page is not generated, the query is invalid. Without the XML page, the query cannot be published.

7.5. Modifying a Query

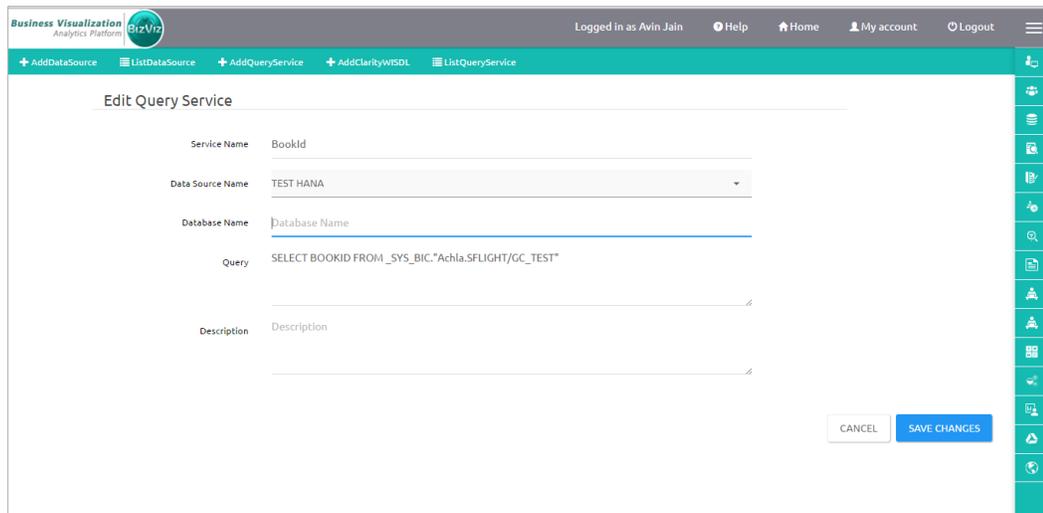
i) **Selecting a Data source** from the dropdown (as shown below) will list the queries



ii) Click on that ‘**Update Query Details**’ symbol to edit the query details

iii) You may edit query details like,

- **Service Name:** Enter a service name
- **Data Source Name:** Select a data source name from drop-down menu
- **Database Name:** Enter a database name
- **Query:** Modify Query
- **Description:** Modify the description related to the query



iv) Click on ‘Save Changes’ to save the updates

7.6. Creating a CA Clarity WSDL

The ‘Clarity WSDL’ option provides access to CA Clarity data. The following are the stages in creating a CA Clarity ‘WSDL’:

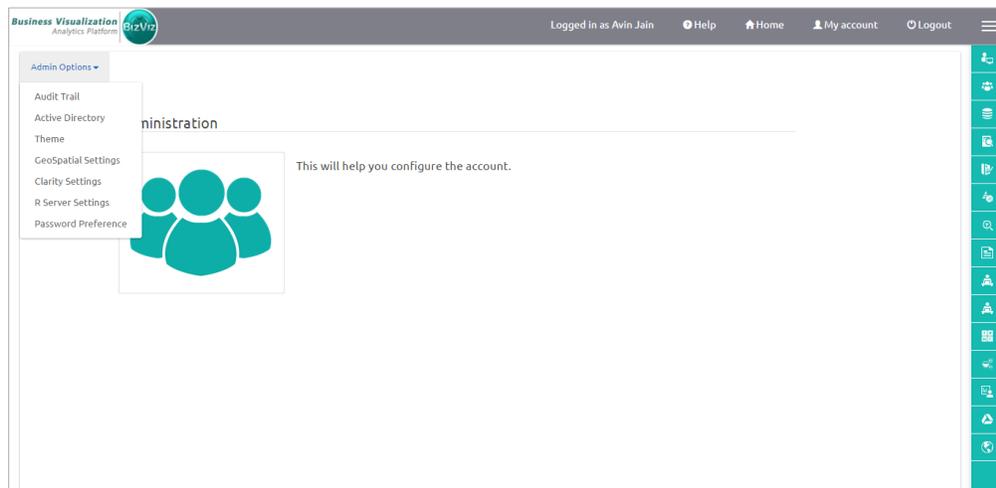
- a. Configuring the BizViz server using CA Clarity settings
- b. Accessing CA Clarity data

a. Configuring the BizViz Server using CA Clarity Settings

To access data from the CA Clarity server, it is required to enter the Clarity server’s details into the BizViz Portal.

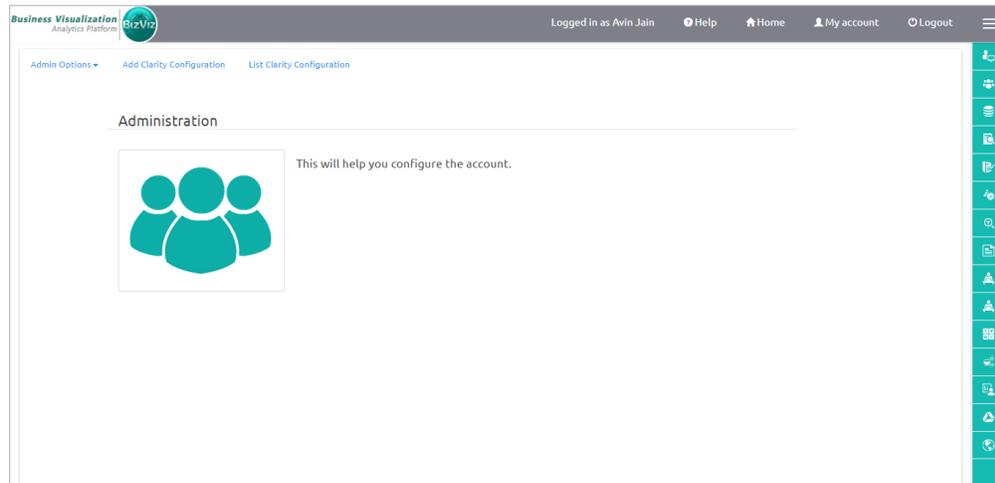
Configuration Steps:

- i) Click on the ‘Menu’  button from the platform home screen to display a list of the applications installed
- ii) Select ‘Administration’ option to avail ‘Admin Options’





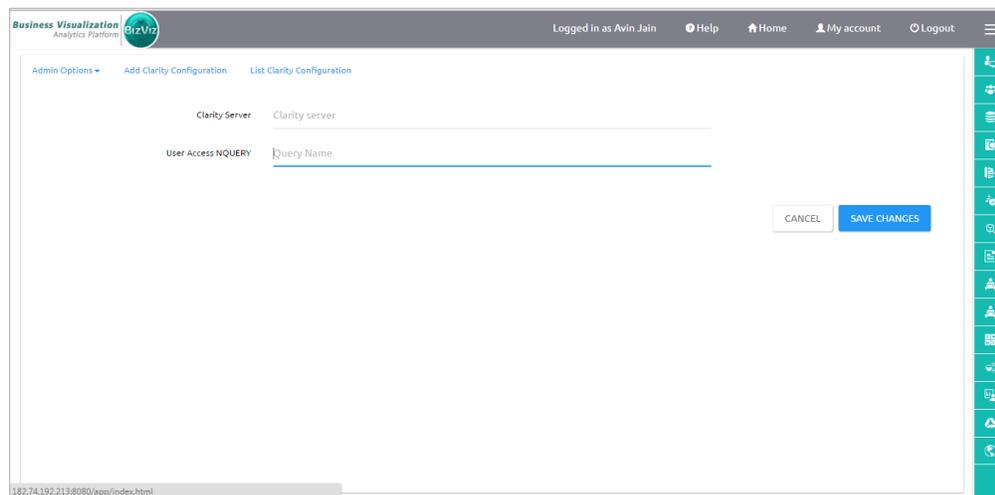
iii) Select **'Clarity Settings'** to display the following page



iv) Click on **'Add Clarity Configuration'** and enter the details

- **Clarity Server:** Enter the CA Clarity server's details (obtained from the Clarity Administrator). URL details of Clarity Server (ex: <http://dashboards.xyz.com>)
- **User Access NQUERY:** Name of the Query that will fetch a list of Clarity users

v) Click on **'Save Changes'**



vi) Click on the **'List Clarity Configuration'** option to view the list of created Clarity configurations

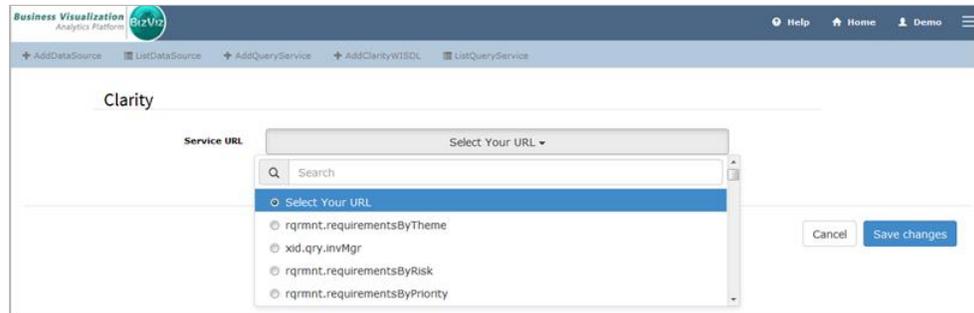


vii) CA Clarity server has been successfully configured (as shown in the above image)

b. Accessing Clarity Data

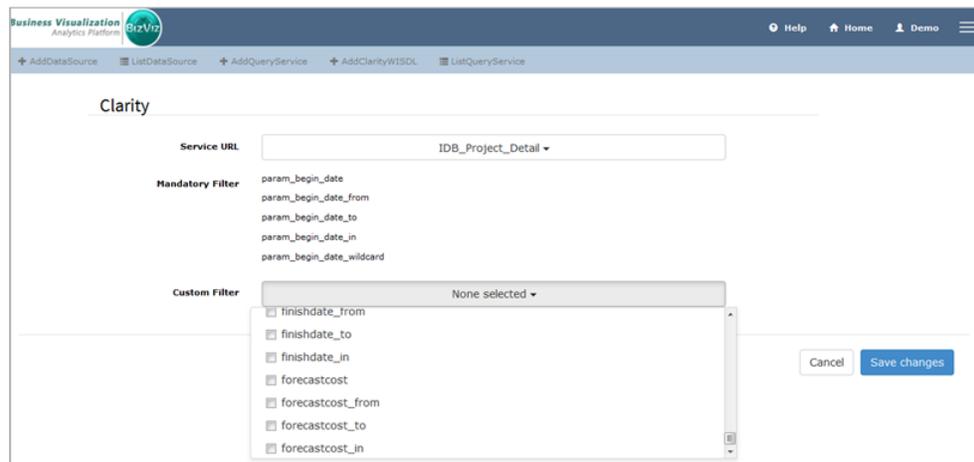
After the above configuration has been done, it is needed to create a **'WSDL'** to access the CA Clarity server data.

- i) Click on **'Data Management'** from the Platform home screen
- ii) Click on **'Add Clarity WSDL'** from the Data Management Home Screen
- iii) Select a **'Service URL'** from the drop-down menu



- iv) On Selecting a URL will display the list of queries present on the clarity server
- v) On selecting a desired query, a list of the fields within that query will be displayed.

All the mandatory fields of the selected query will be displayed, followed by the optional fields (if it has any)



- vi) The user can customize the query by selecting optional fields and giving desired values for those fields.

Ex: City = London → only data related to London will display in the report.

- vii) Click on **'Save Changes'**

Note:

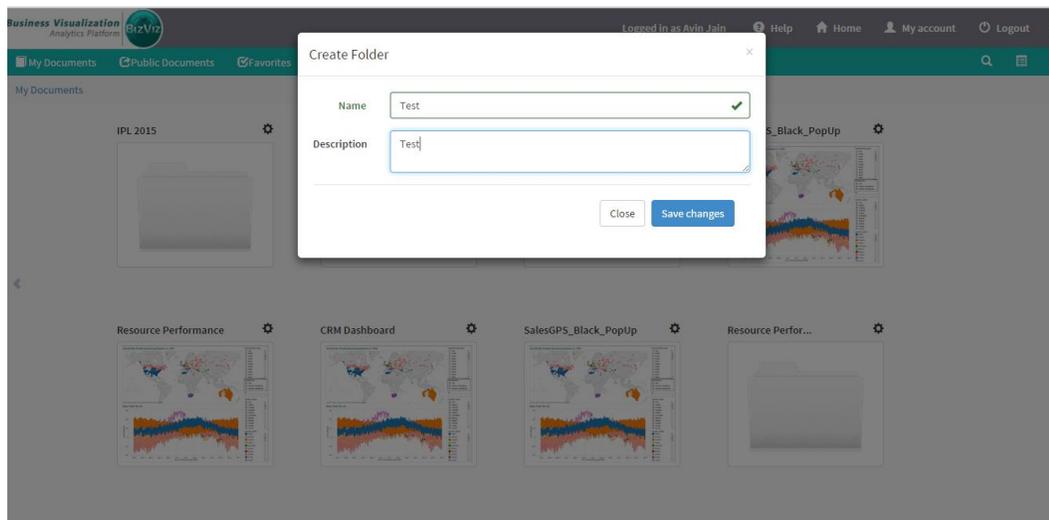
Currently, the WSDL option is available only for business views and geospatial.

8. Managing a Folder

User can create and manage a folder by clicking anywhere in the 'My Documents' located at the Platform home screen.

8.1. Creating a Folder under 'My Documents'

- i) Press right click on the Home screen of the Platform
- ii) A side screen will appear with various options
- iii) Select 'Create Folder'
- iv) 'Create Folder' pop-up screen appears
- v) Enter folder 'Name' and 'Description' (if desired) in the fields
- vi) Click on 'Save Changes'

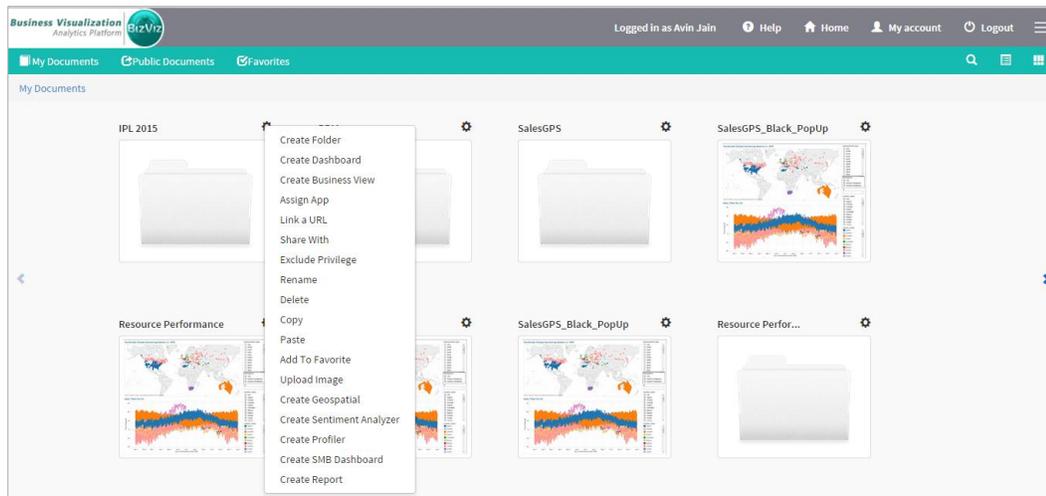


- vii) The folder will be created successfully

8.2. Various Features of a Folder

User can avail all the existing folders under the 'My Documents' from the Platform home screen. A single folder is credited with various features. All the attributive features of a folder are described over here:

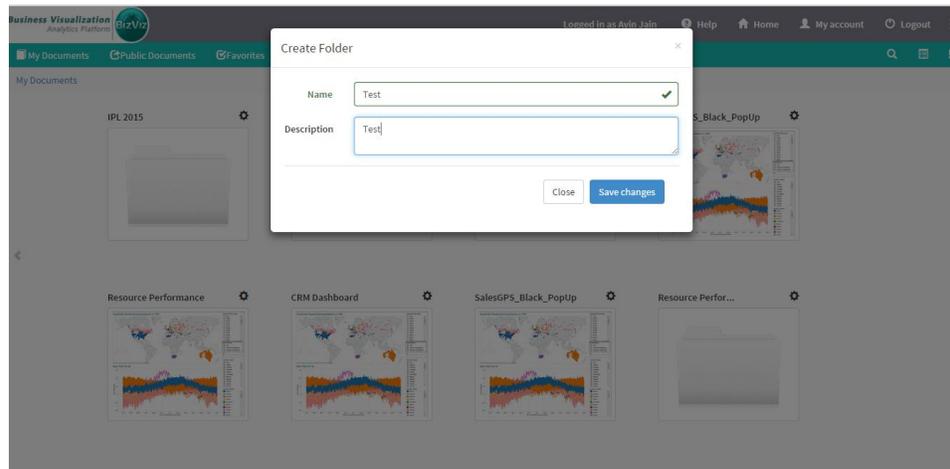
- i) Select an existing folder from 'My Documents'
- ii) Click on  button or Right lick on the folder
- iii) A list of all the available features is displayed



8.2.1. Creating a Folder (Sub-Folder)

This part describes steps by step process to create a sub-folder under an existing folder.

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Create Folder'**
- iv) **'Create Folder'** pop-up screen appears
- v) Enter folder **'Name'** and **'Description'** (if desired) in the fields
- vi) Click on **'Save Changes'**



- vii) The (sub) folder will be created successfully

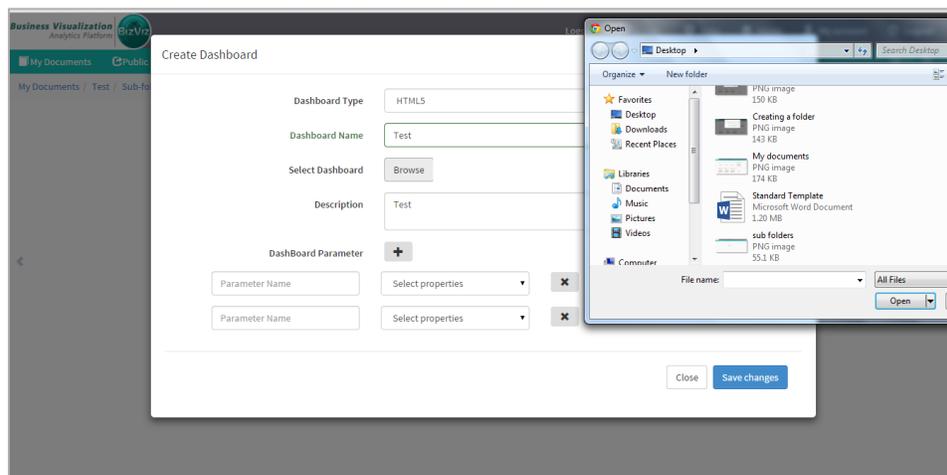


viii) User can create multiple sub-folders under a folder.

8.2.2. Creating a Dashboard

This part describes steps by step process to create a dashboard under folder.

- i) Select a folder from 'My Documents'
- ii) Click on  button or Right Click on the folder
- iii) Select 'Create Dashboard'
- iv) 'Create Dashboard' pop-up screen appears
- v) Enter the required details in the fields
 - Dashboard Type from the pull down menu
 - Dashboard Name
 - Select Dashboard (Browse 'niv' or 'bvz' files from the computer system)
 - Description
- vi) Click on  to add Dashboard Parameters
- vii) Click on 'Save Changes'



viii) The dashboard will be created successfully

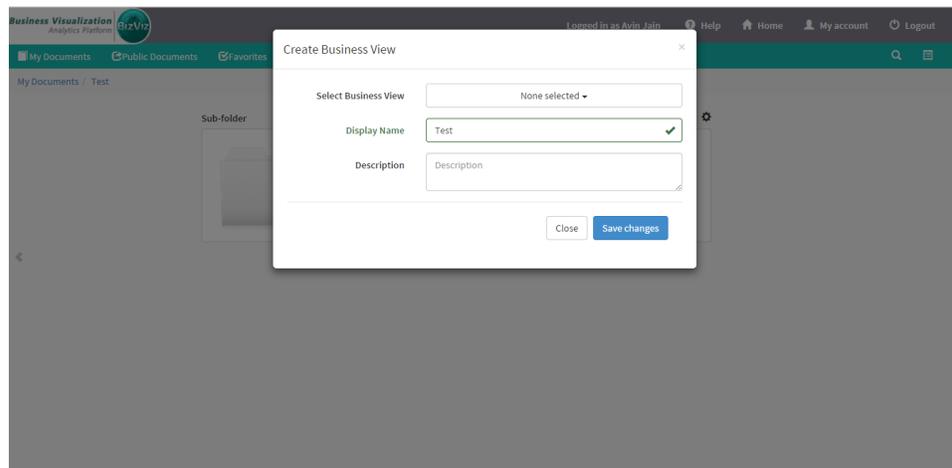
Note:

User can fix the width and height of the created dashboard.

8.2.3. Creating a Business View

This part describes steps to create a business view under folder. Follow the below given steps to create a business view:

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Create Business View'**
- iv) **'Create Business View'** pop-up screen appears
- v) Enter the required details in the fields
 - Select Business View from the pull down menu
 - Display Name
 - Description
- vi) Click on **'Save Changes'**



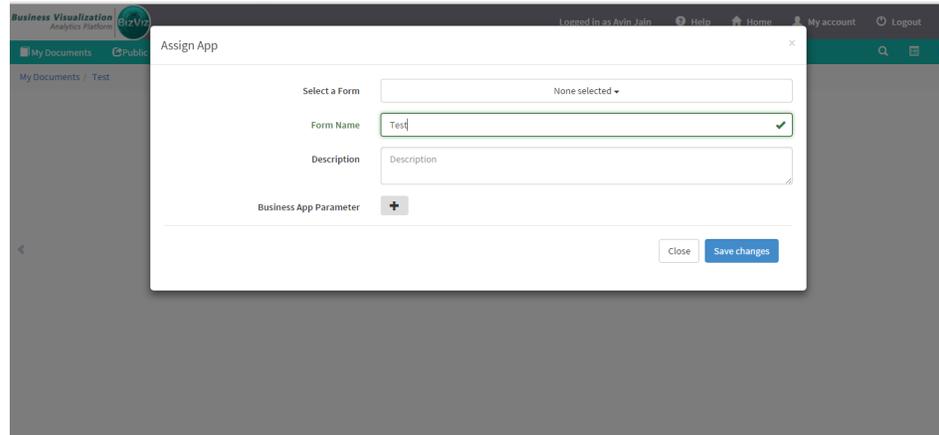
- vii) The Business View will be created successfully

8.2.4. Assigning an App

User can assign app to the folder by following the below given steps:

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Assign App'**
- iv) **'Assign App'** pop-up screen appears
- v) Enter the required details in the fields
 - Select a Form from the pull down menu
 - Form Name
 - Description
- vi) Click on  button to add **'Business App Parameter'**

vii) Click on **'Save changes'**

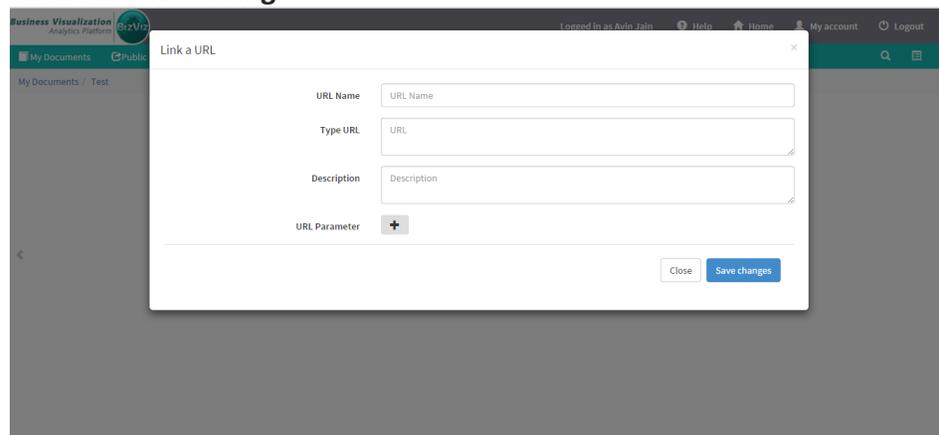


viii) The app will be assigned successfully to the folder.

8.2.5. Linking a URL

User can link a URL to the folder.

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Link a URL'**
- iv) **'Link a URL'** pop-up screen appears
- v) Enter the required details in the fields
 - URL Name
 - Type your URL here.
 - Provide Description if desired
- vi) Click on  button to add URL Parameters
- vii) Click on **'Save Changes'**



viii) The URL will be successfully linked to the folder.

8.2.6. Sharing a Folder

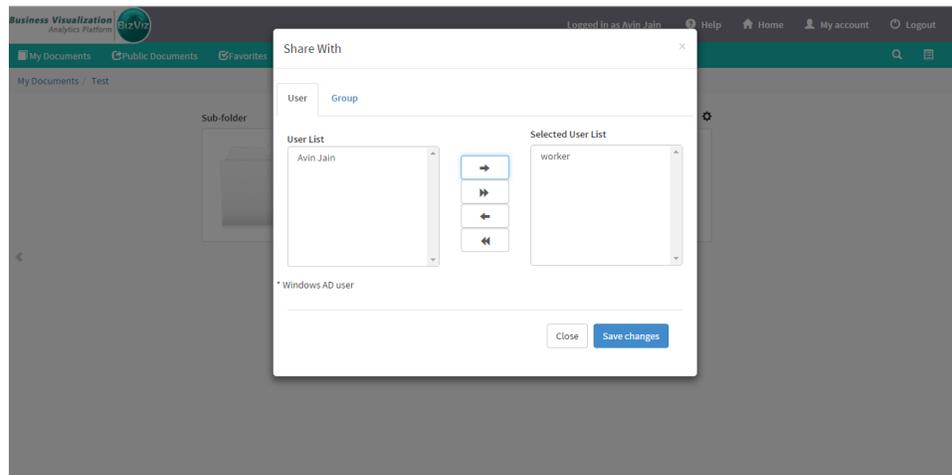
Administrator can share the platform folder information with user and group lists.

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Share With'**
- iv) **'Share With'** pop-up screen appears
- v) Two options will appear in the **'Share With'** pop-up screen to share the platform folder
 - **User:** Move one or more users from the **'User List'** to the **'Selected User'** List
 - **Group:** Move one or more groups from the **'Group List'** to the **'Selected Group List'**

⇒ Tip

Use  to move single user (Or) use  to move all users.

- vi) Click on **'Save Changes'**



- vii) A message appears to assure that the data has been shared successfully

8.2.7. Excluding Privilege Rights

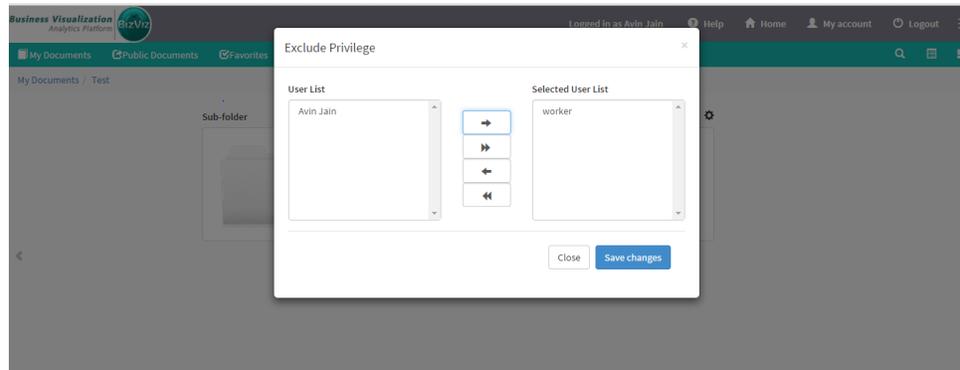
Administrator can exclude privilege rights to the selected user list in the portal.

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Exclude Privilege'**
- iv) **'Exclude Privilege'** pop-up screen appears
- v) Select one or more users from the **'User List'** and move them to the **'Selected User List'** to exclude the privilege rights

⇒ Tip

Use  to move single user (Or) use  to move all users.

vi) Click on **'Save Changes'**

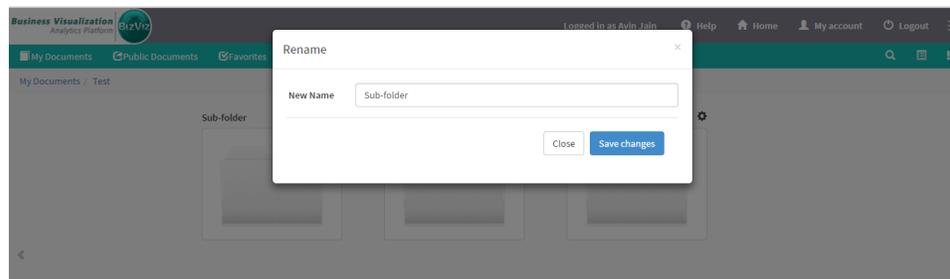


vii) A message appears to assure that the selected user(s) have been excluded from the privilege right

8.2.8. Renaming a Folder

It is possible to change the name of the created folder.

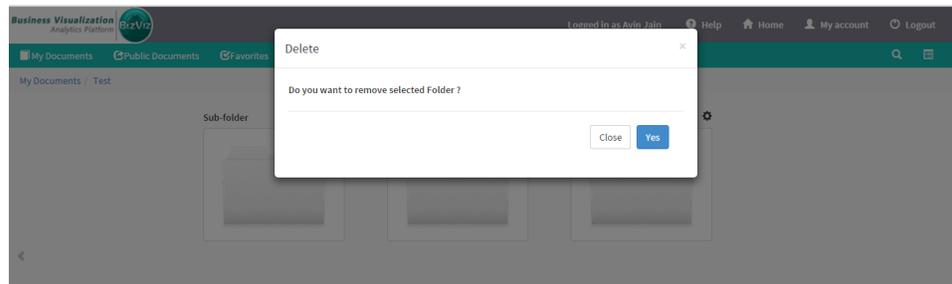
- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Rename'**
- iv) **'Rename'** pop-up screen appears
- v) Enter a new name
- vi) Click on **'Save changes'**



vii) A message appears to assure that the data has been saved successfully

8.2.9. Deleting a Folder

- i) Select a folder from **'My Documents'**
- ii) Click on  or Right Click on the folder
- iii) Select **'Delete'**
- iv) A pop-up screen appears to assure the deletion
- v) Select **'Yes'**, if you wish to delete the folder

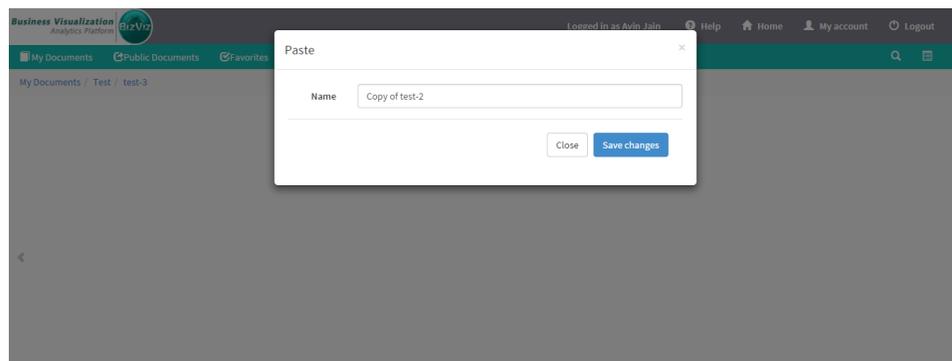


vi) A message appears to assure that the folder has been deleted successfully

8.2.10. Copying and Moving a Folder

It is possible to copy a folder and paste the folder to the selected place from the BizViz Platform

- i) Select a folder from **'My Documents'**
- ii) Click  or Right Click on the folder
- iii) Select **'Copy'**
- iv) Select another folder **or** go to **'My Document'**
- v) Right Click on the another folder **or** in **'My Document'** to avail **'Paste'** option
- vi) **'Paste'** pop-up screen appears
- vii) The **Name** mentioned in the pop-up screen shows prefix **'Copy of-'** before the original name of the folder (E.g. *test 2* folder will have a new name *Copy of test 2*)
- viii) Click on **'Save Changes'**



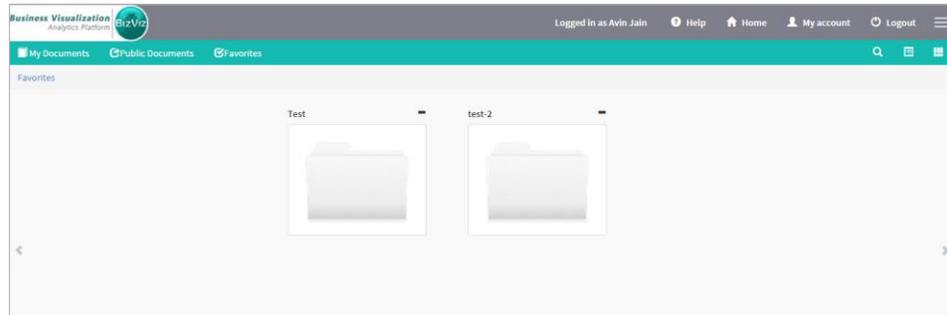
ix) A Message appears to assure that the copied folder has been pasted successfully with a different name

8.2.11. Adding or Removing a Folder ('to' and 'from' Favorites)

User can add a folder to or remove it from the **'Favorites'** option provided under platform. Generally, the documents in frequent use by the users are a part of Favorites.

- i) Select a folder from **'My Documents'**

- ii) Click on  button or Right Click on the folder
- iii) Select **'Add To Favorite'**
- iv) A pop-up screen appears with a message, **"Folder added successfully!"**
- v) Selected folder will be successfully added to **'Favorites'**

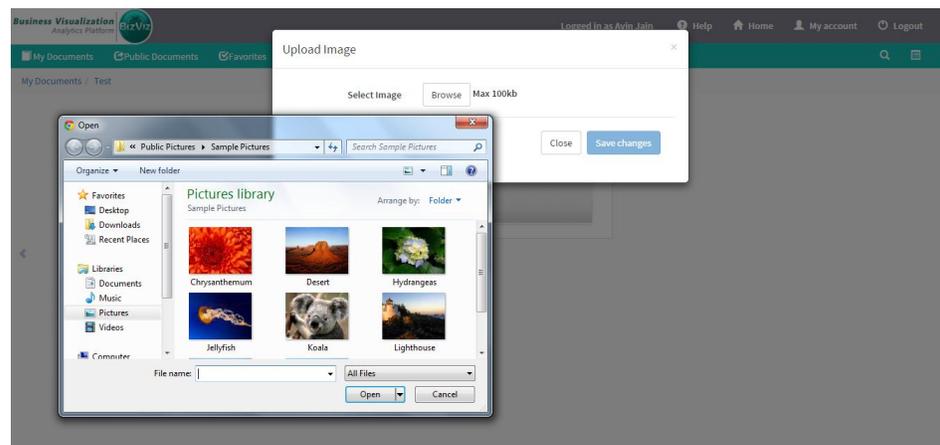


- vi) Open **'Favorites'**
- vii) Click on  sign to remove the selected folder from **'Favorites'**
- viii) A pop-up screen appears with a message, **"Document removed successfully!"**
- ix) The folder will be removed from the **'Favorites'**

8.2.12. Uploading an Image

User can set an image for the folder. The image can be uploaded from the current system in use.

- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Upload Image'**
- iv) **'Upload Image'** pop-up screen appears
- v) You can browse your desired image
- vi) Click on **'Save Changes'**



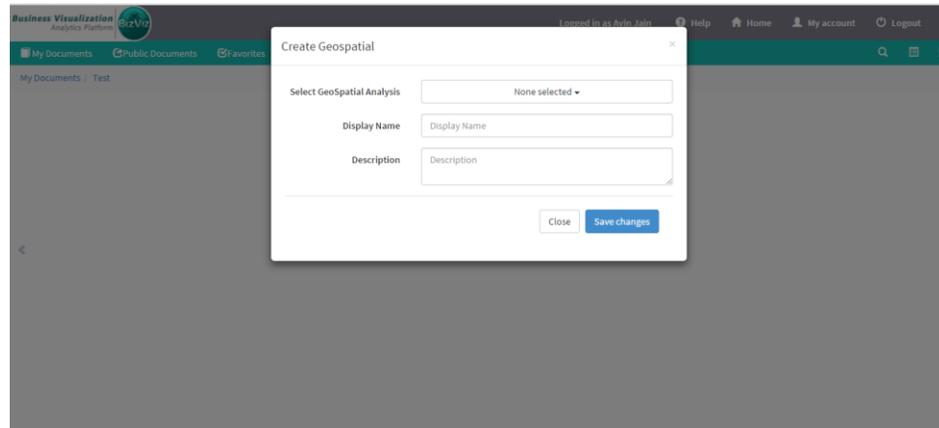
- vii) The image will be uploaded/ added successfully

Note:

Maximum image size should be 100 kb for successfully uploading an image to the folder.

8.2.13. Creating a Geospatial

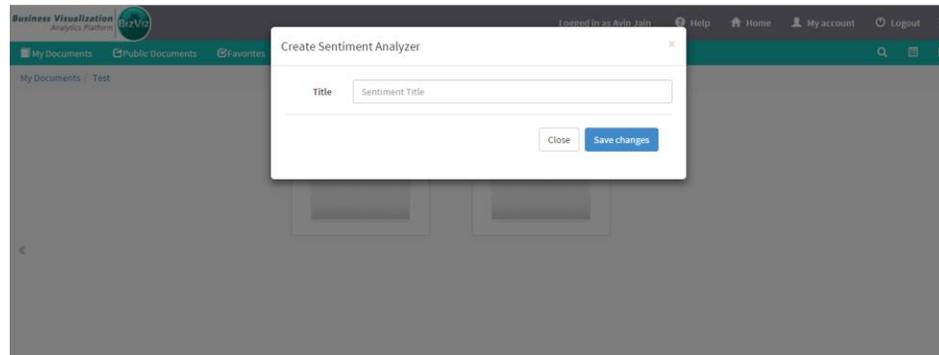
- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Create Geospatial'**
- iv) **'Create Geospatial'** Pop-up screen appears
- v) Enter the required details in the fields
 - Select Geospatial Analysis (select from the pull down menu)
 - Display Name: enter a geospatial name
 - Description (if desired)
- vi) Click on **'Save Changes'**



- vii) The Geospatial will be created successfully

8.2.14. Creating a Sentiment Analyzer

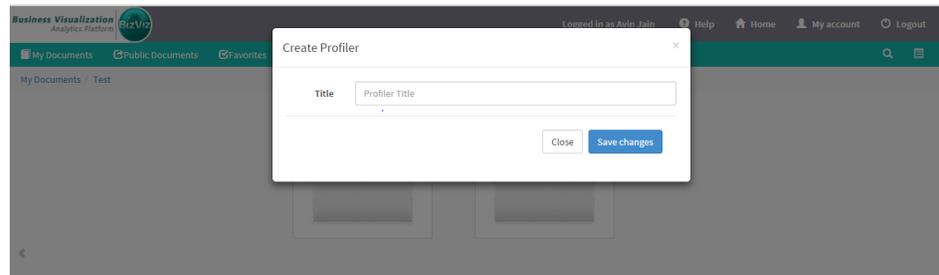
- i) Select a folder from **'My Documents'**
- ii) Click on  button or Right Click on the folder
- iii) Select **'Create Sentiment Analyzer'**
- iv) **'Create Sentiment Analyzer'** pop-up screen appears
- v) Enter a title for sentiment analyzer
- vi) Click on **'Save Changes'**



vii) The Sentiment Analyzer will be created successfully

8.2.15. Creating a Profiler

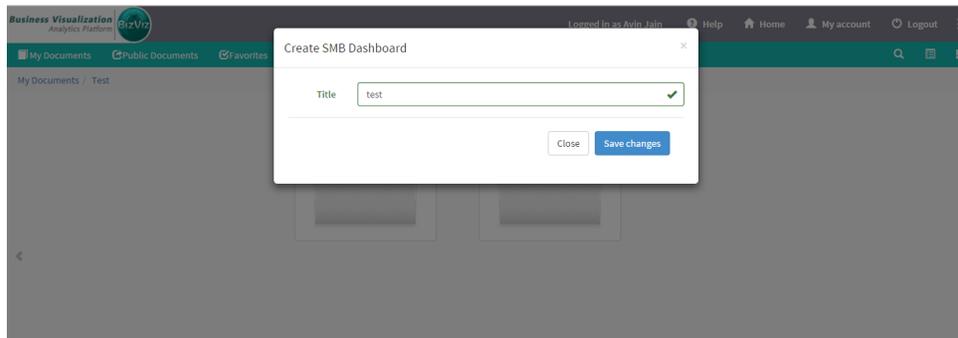
- i) Select a folder from 'My Documents'
- ii) Click on  button or Right Click on the folder
- iii) Select 'Create Profiler'
- iv) 'Create Profiler' pop-up screen appears
- v) Enter a title for profiler
- vi) Click on 'Save Changes'



vii) The profiler will be created successfully

8.2.16. Creating a SMB Dashboard

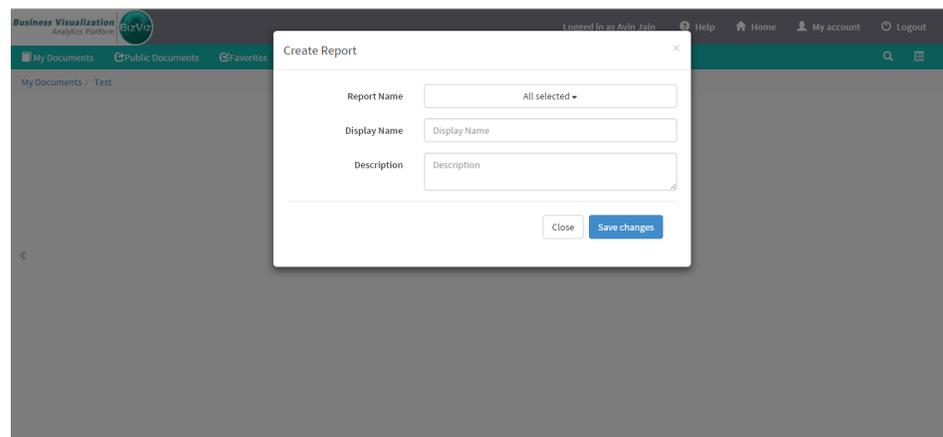
- i) Select a folder from 'My Documents'
- ii) Click on  button or Right Click on the folder
- iii) Select 'Create SMB Dashboard'
- iv) 'Create SMB Dashboard' pop-up screen appears
- v) Enter SMB title in the pop-up screen
- vi) Click on 'Save Changes'



vii) The SMB Dashboard will be created successfully

8.2.17. Creating a Report

- i) Select a folder from 'My Documents'
- ii) Click on  button or Click on the folder
- iii) Select 'Create Report'
- iv) 'Create Report' pop-up screen appears
- v) Enter the required details in the fields
 - Report Name (Select from the pull down menu)
 - Display Name: Enter a name for report
 - Description (if desired)
- vi) Click on 'Save Changes'



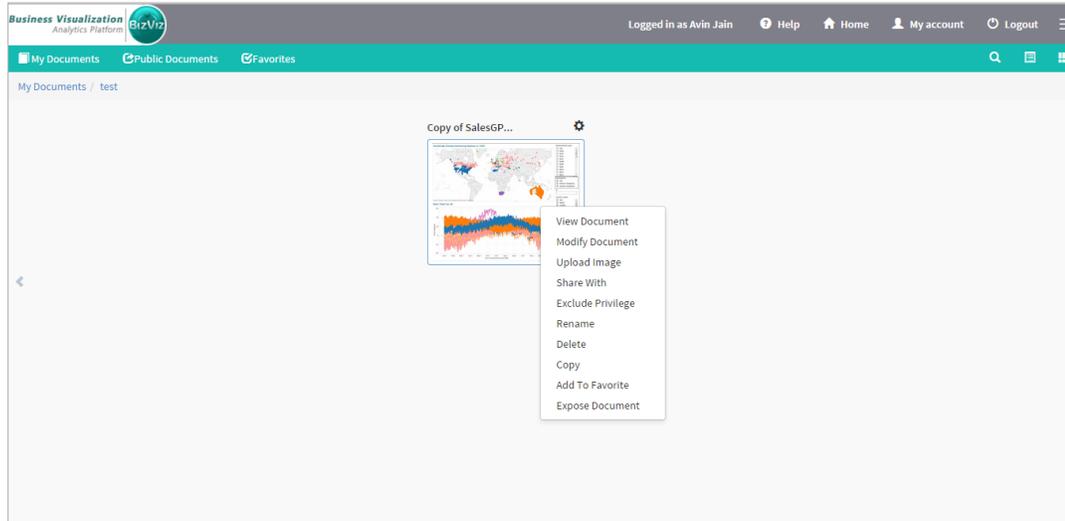
vii) The report will be created successfully

9. Managing a Dashboard

Users are provided with various attributive features to manage the existing dashboard located in 'My Documents' under BizViz Platform. They need to select an existing dashboard to avail all the managing features of a dashboard.

Step by step process to avail all the features

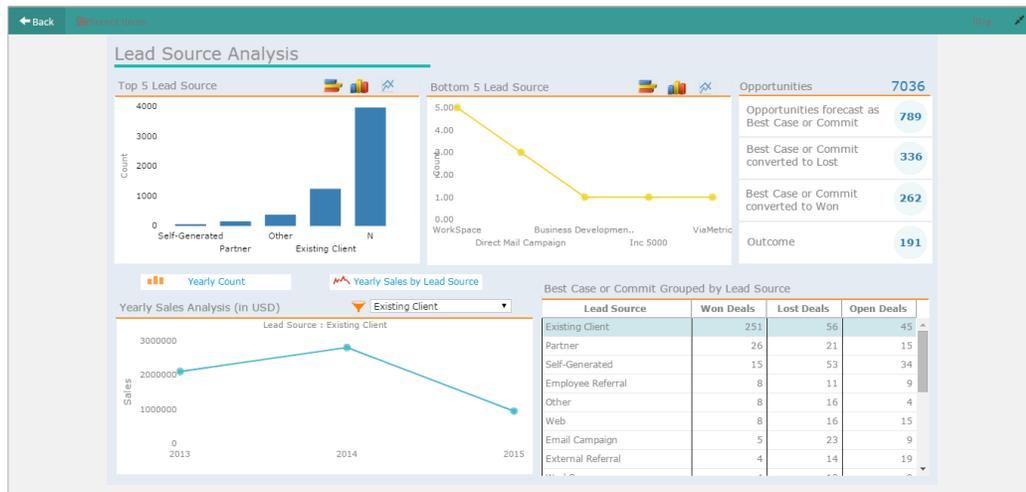
- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) A list of all the attributive features provided to the dashboard will be displayed



9.1. Displaying a Dashboard

This part describes step by step process to view an existing dashboard under **'My Documents'**.

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'View Document'**
- iv) Dashboard screen appears
- v) There four options provided on the dashboard screen to facilitate the viewers
 - a. **Back**: To go back to the selected dashboard
 - b. **Recent Items**: To stay on the recently opened page
 - c. **Blog**: This option is provided to explain about the dashboard or insert feedback comments
(Please refer **'Steps to Access Blog Page'** provided at the end of this topic to know about this option in detail)
 - d. **Full Screen/ Reduce Size**: To view the dashboard in full screen or to reduce the size of dashboard screen



Steps to Access Blog Page

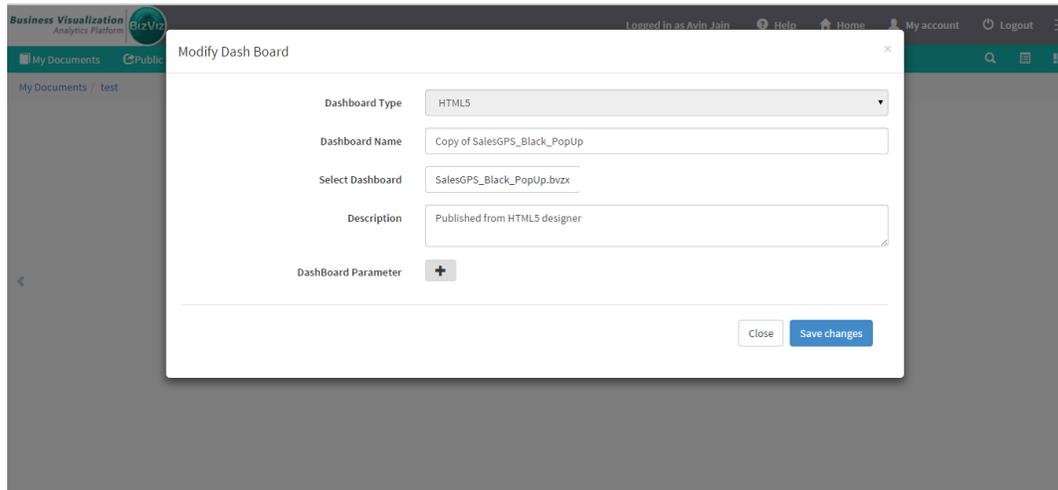
- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'View Document'**
- iv) Dashboard screen is displayed
- v) Select **'Blog'**
- vi) A slider window opens below
- vii) Click on  button to access the blog page
- viii) A new window opens containing space to insert the comment
- ix) Insert the comment
- x) Click on **'Save Changes'**
- xi) The comment will be successfully included in the document.

9.2. Modifying a Dashboard

This part describes step by step process to modify an existing dashboard. The steps are as mentioned below:

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'Modify Document'**
- iv) **'Modify Dashboard'** pop-up screen appears
- v) Enter the required details in the fields
 - Dashboard Type
 - Dashboard Name
 - Select Dashboard
 - Description

- vi) Click on  button to add dashboard parameters
- vii) Click on 'Save Changes'

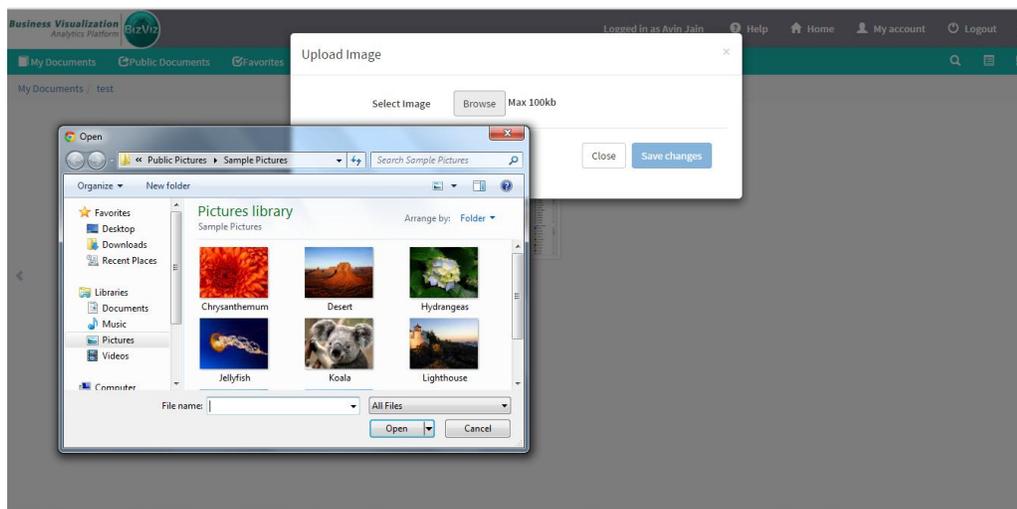


- viii) A message appears to assure that the data has been saved successfully

9.3. Uploading an Image

You can set an image into the existing dashboard

- i) Select a dashboard from 'My Documents'
- ii) Click on  button or Right Click on the dashboard
- iii) Select 'Upload Image'
- iv) 'Upload Image' pop-up screen appears
- v) Browse the desired image
- vi) Click on 'Save Changes'



- vii) The image will be uploaded successfully

Note:

Maximum image size should be 100 kb for successfully uploading an image to the dashboard

9.4. Excluding Privilege Rights

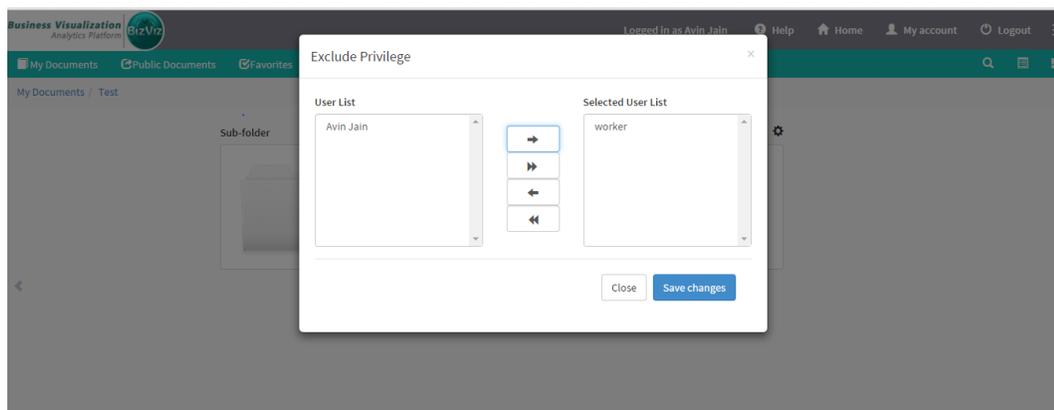
Administrator can exclude privilege rights of the selected user list in the platform.

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'Exclude Privilege'**
- iv) **'Exclude Privilege'** pop-up screen appears
- v) Select users from the **'User List'** and move them to **'Selected User List'** to exclude privilege rights

 **Tip**

Use  to move single user (Or) use  to move all users.

- vi) Click on **'Save Changes'**



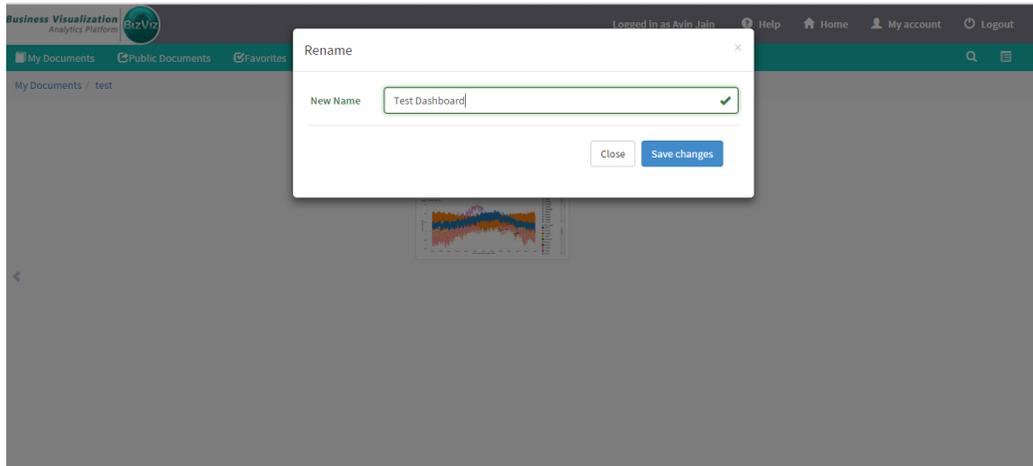
- vii) A message will appear to assure that the selected user(s) have been excluded from the privilege right

9.5. Renaming a Dashboard

User can change the name of an existing dashboard.

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'Rename'**
- iv) **'Rename'** pop-up screen appears
- v) Enter a new name of the dashboard

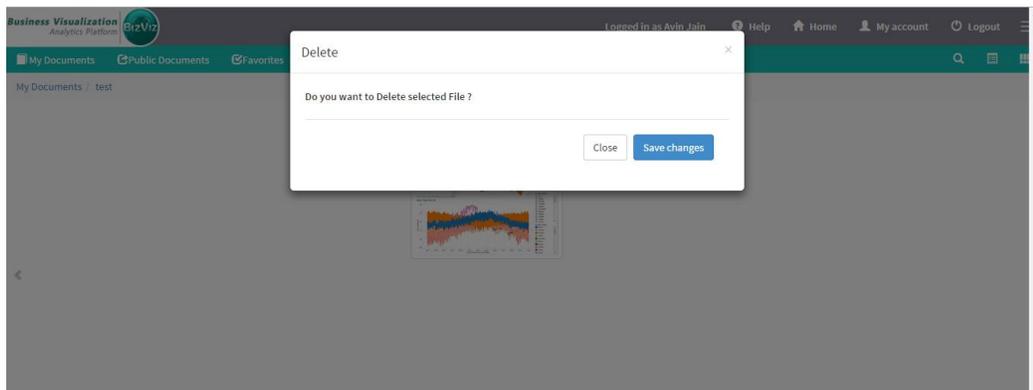
vi) Click on **'Save Changes'**



vii) A message appears to assure that the document has been renamed successfully

9.6. Deleting a Dashboard

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'Delete'**
- iv) A pop-up screen appears to confirm deletion
- v) Click on **'Save Changes'** to confirm the deletion of the selected dashboard



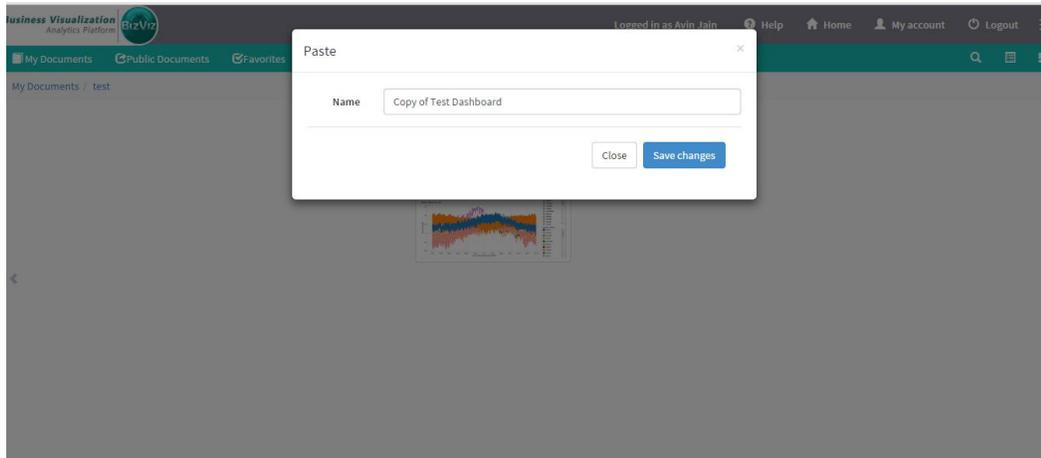
vi) The selected dashboard will be deleted successfully

9.7. Copying and Moving a Dashboard

Administrator can copy the existing dashboard and paste it at any chosen place within My Documents of the platform.

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'Copy'**

- iv) Select a folder or file
- v) Click on the selected folder/ file to avail Paste option
- vi) **'Paste'** pop-up screen appears
- vii) The **'Name'** mentioned in the pop-up screen shows prefix **"Copy of-"** before the original name of the dashboard (E.g. **Test Dashboard** will have a new name **Copy of Test Dashboard**)
- viii) Click on **'Save Changes'**

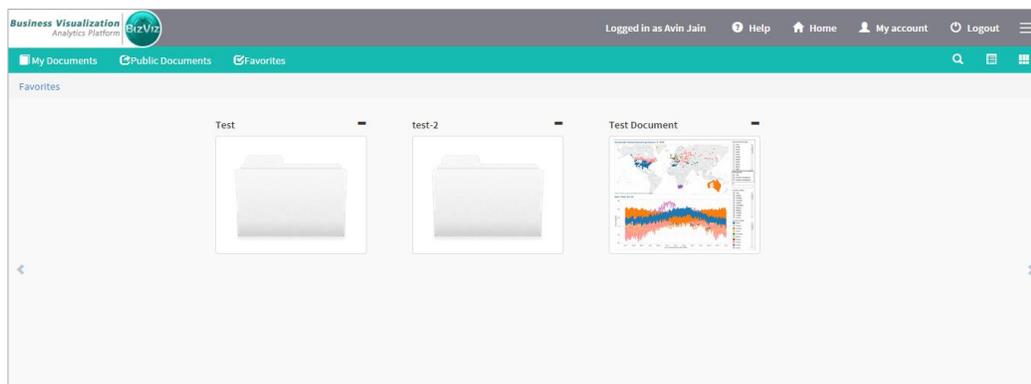


- ix) The selected dashboard will be pasted successfully with a different name

9.8. Adding and Removing a Dashboard ('to' and 'from' Favorites)

User can add a dashboard to or remove it from **'Favorites'** option provided under platform. Generally, the documents in frequent use by users are a part of favorites.

- i) Select a dashboard from **'My Documents'**
- ii) Click on  button or Right Click on the dashboard
- iii) Select **'Add To Favorite'**
- iv) A pop-up screen appears with a message, **"Document added successfully!"**
- v) Selected folder will be successfully added to **'Favorites'**



- vi) Click on **'Favorites'** to see the added dashboard(s)

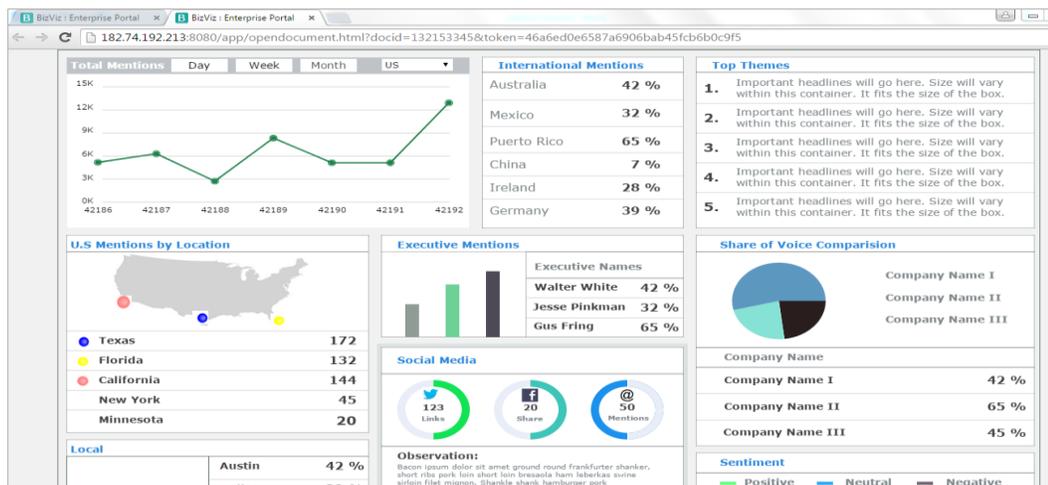


- vii) Click on “” sign provided on the dashboard to remove the existing dashboard from ‘Favorites’
- viii) A pop-up screen appears with a message, “Document removed successfully!”
- ix) The dashboard will be removed from ‘Favorites’

9.9. Publishing a Dashboard

All the existing dashboards under BizViz Platform can be published using this feature. It generates a link that can be embedded in any website or application.

- i) Select a dashboard from ‘My Documents’
- ii) Click on  button or Right Click on the dashboard
- iii) Select ‘Publish Document’
- iv) A new link will be generated by default
- v) Dashboard screen opens in a new window



- vi) The dashboard is published successfully

10. Managing Personal Settings

This portion covers options to maintain the user account settings

10.1. Information: Displaying a Profile

It displays basic personal information about the user on the left pane of the page which can be modified.

Steps to avail basic information of the Administrator:

- i) Go to platform home screen
- ii) Click on ‘My Account’
- iii) A new page opens providing three options to modify the existing account



- iv) **'Information'** opens by default as being the first option
- v) Basic information about the user is displayed under **'Information'**. It includes,
 - Email
 - Full Name
 - Mobile Number
 - Land Number
 - Address
- vi) Click on **'Save Changes'**

Note:

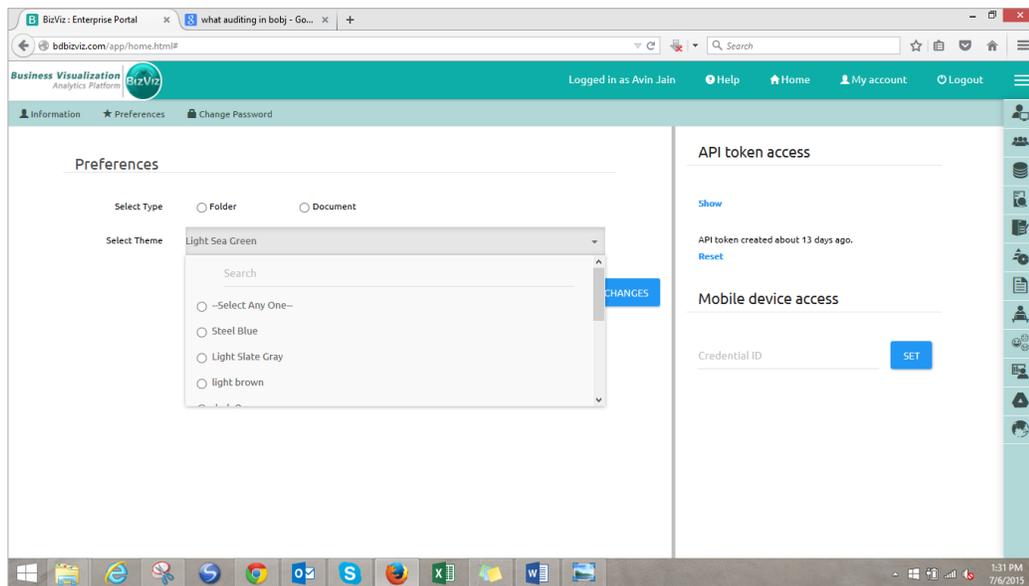
Except email address, all the other profile information can be modified from the **'Information'** module.

10.2. Preferences

Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

- i) Click on **'Preferences'**
- ii) Select a type out of the given choices: **'Folder'** or **'Document'**
- iii) Use radio button to select either of the choices – Folder or Document.
- iv) Select a theme from the drop down menu
- v) Click on **'Save Changes'**
- vi) A message appears to assure that the preferences have been updated successfully



10.3. Changing Password

User can reset the password for his account using this segment.

Follow the step by step process given below:

- i) Go to the platform home screen
- ii) Click on **'My Account'**
- iii) Click on **'Change Password'**
- iv) A new page opens
- v) Enter **'Old Password'**, **'New Password'**, and **'Confirm Password'** (the newly set password)
- vi) Click on **'Save Changes'**
- vii) The password will be successfully changed

API Token and Mobile Device Access

API token access and Mobile Device Access are displayed on the right pane of the page.

a. API Token

- It is an authentication token that is used to expose document as an open document.
- API token can be accessed and reset from **'My Account'**.

b. Mobile Device Access

- Mobile device access is secured with unique code and generates new code according to the set time.
- User needs to set the credential for the first time while using this feature, then after the feature can be easily availed from iOS App Store.



10.4. Logging Out

Follow the step by step process given below to log out from the BizViz platform.

- i) Go to the platform home screen to avail '**Logout**' option
- ii) Click on '**Log Out**'
- iii) You will be successfully logged out from the BizViz Platform

Note:

Clicking on '**Log Out**' redirects the user back to the '**Log In**' page of the BizViz platform

11. Securing Platform: Authentication

BizViz Platform is provided with some authentication features to keep it secure all the time.

11.1. Enterprise

Enterprise authentication is the default authentication method for the BizViz platform; it is automatically enabled when you first install the system - it cannot be disabled. When you add and manage users and groups, the BizViz platform maintains the user and group information within its database. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BizViz platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server. You do not have to configure or enable Enterprise authentication. You can however modify Enterprise authentication settings to meet your organization's particular security requirements. You can modify Enterprise authentication settings through the administration module.

11.2. Windows AD

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.

11.3. Clarity

Security in CA Clarity PPM has two aspects: securing the application and 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 their assigned data.

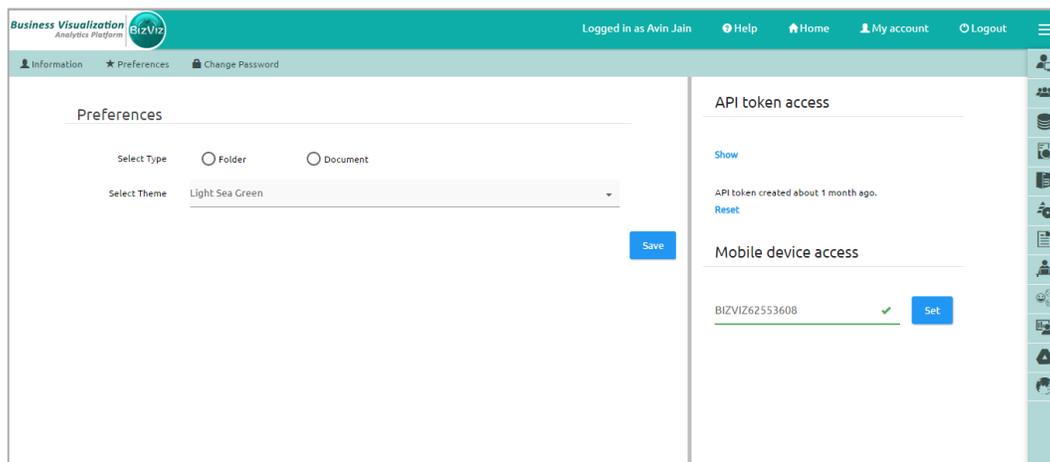
E.g. everybody should be able to see the platform page, but with their assigned projects and functionalities.

11.4. Mobile

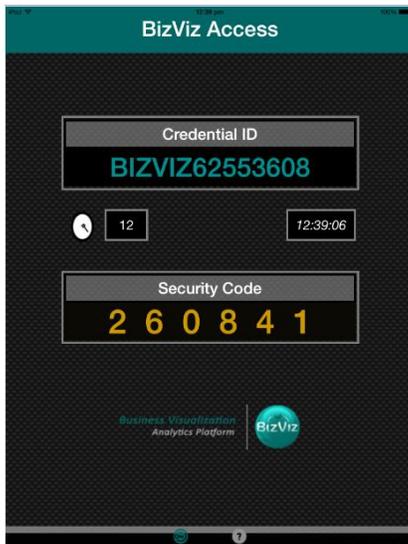
It is an advanced security feature to secure the mobile access of the BizViz application. It requires access to the BizViz server for the first time to register the credentials, user can then easily avail it from the iOS App Store. A time bound security code is generated automatically, after the credentials are registered successfully. In order to safeguard mobile access and collaboration, the security code keeps on changing. It provides robust security to assure user identity, fraud detection, data protection etc. Mobile device access can be managed from the administrator's My Account segment provided in the BizViz Platform.

Steps to Access and Use Mobile Authentication

1. Go to the platform home screen
2. Click on **'My Account'**
3. **'Mobile Device Access'** will be displayed on the right side of the pane
4. Set a **'Credential ID'** from **'Mobile Device Access'** option



5. Avail the **'BizViz Access'** screen in your mobile device (as shown below)
6. The set **'Credential ID'** will be displayed with a **'Security Code'**



7. Go to the platform login screen
8. Select '**Mobile**' as an authentication option
9. Enter the user specific email id
10. Use the set '**Credential ID**' as password while logging in to the BizViz platform