

# BizViz How-to-Guide

## Platform

## User Management

**Release :** 2.0

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## 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

### 2.1. Software

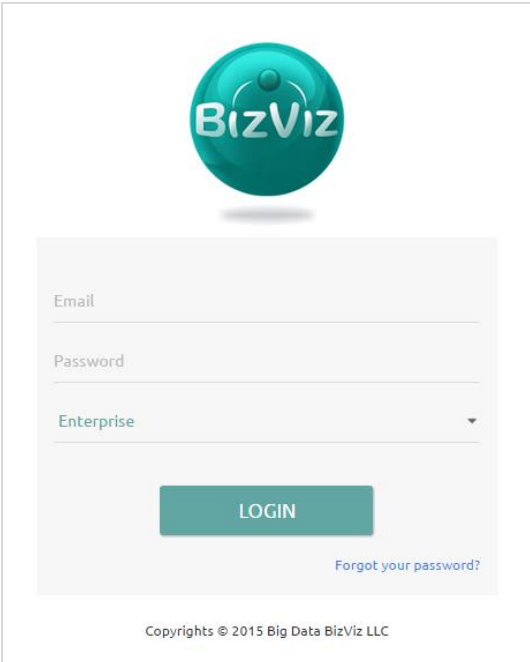
- Browser that supports HTML5
- Operating System: Windows7

### 2.2. Basic understanding of the BizViz Server

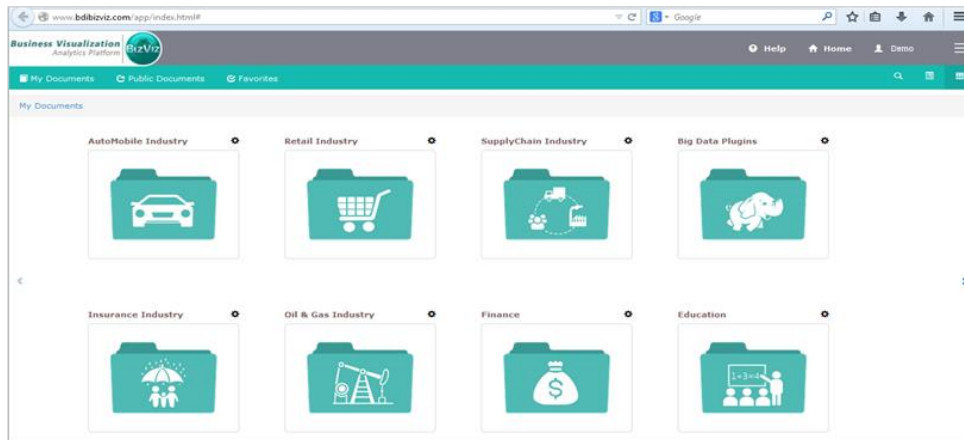
## 3. Step-by-Step Process


### 3.1. Login to the Portal to access Data Management

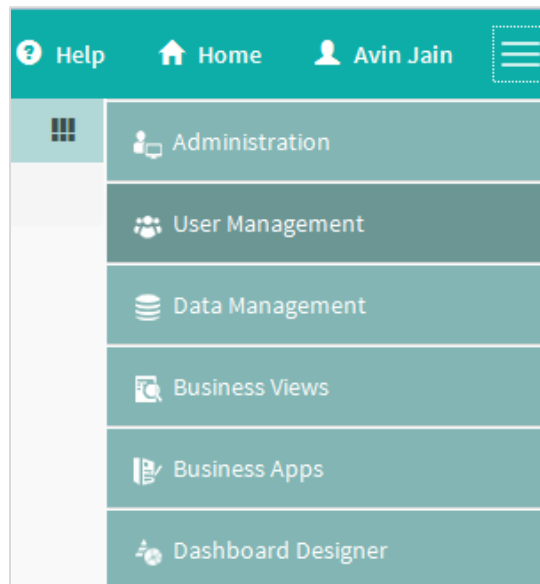
- In the URL bar, enter → <http://apps.bdbizviz.com/app/index.html>
- Enter your credentials to Login



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



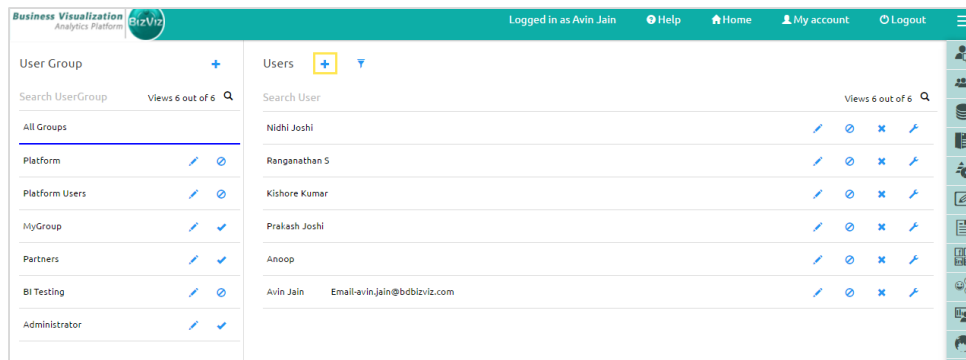
iv) Click on the 'Menu'  button to display a list of the installed apps.



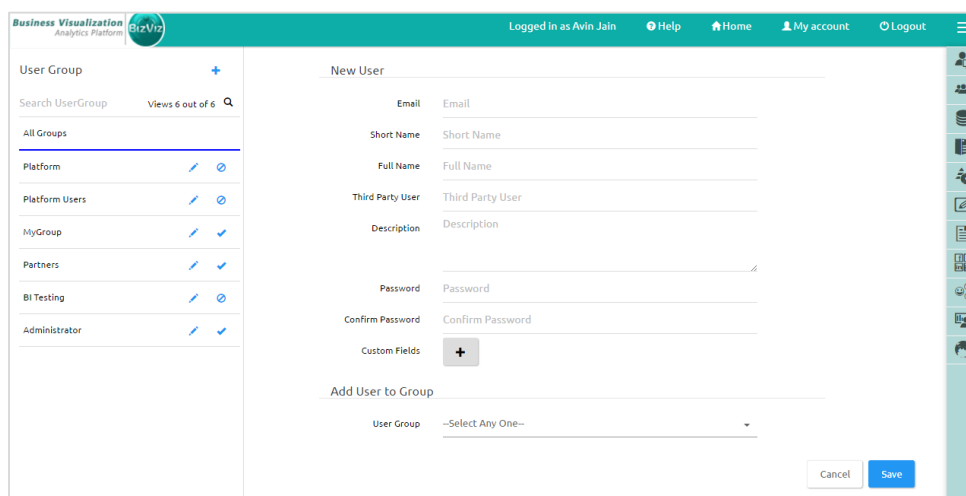
v) Click on 'User Management' plug-in available in the above figure (see above)

### 3.2. Adding New User

- i) Click on menu 'User Management'  
**Menu > User Management**
- ii) Click on the '+' icon (as shown in the below figure)



iii) Clicking on the '+' icon redirects users to the below page



Enter the following fields:

- **Email** – Enter valid email address of the user
- **Short Name** – Name of the user
- **Full Name** – Detailed name of the user
- **Third Party User** – Option to synchronize third party user accounts
- **Description** – Any description related to user
- **Password** – Secure authentication to access the account
- **Confirm Password** – Confirm the authentication by re-entering the password
- **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.)
- **User Group**: Adding user to a group

iv) Click on the 'Save' button to apply the changes.

### 3.3. Adding a New Group

#### User Management> '+' User Group

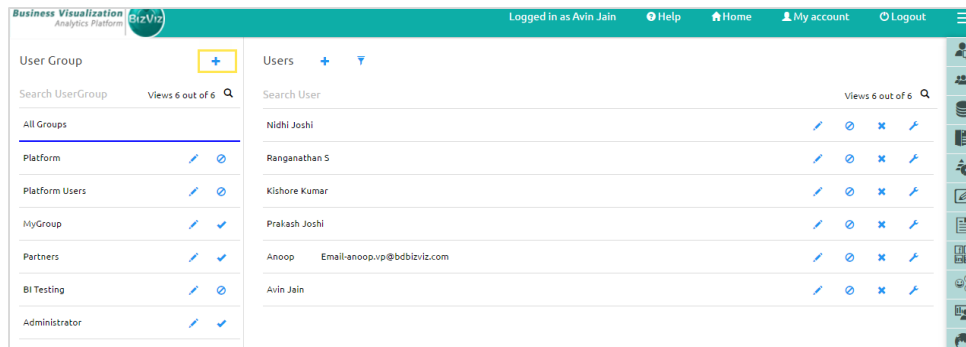
This option performs the below mentioned actions

- a. Creates New Groups

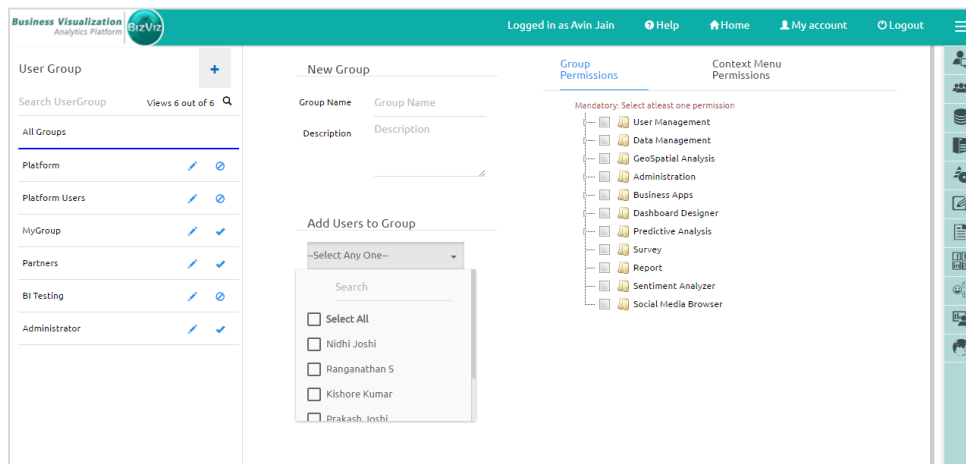
- b. Add Users to Groups
- c. Provide Group Permissions to Users

**a. Creates New Groups:**

i) Click on the '+' icon as shown in the below figure



ii) Click on the '+' icon redirects users to the below given page

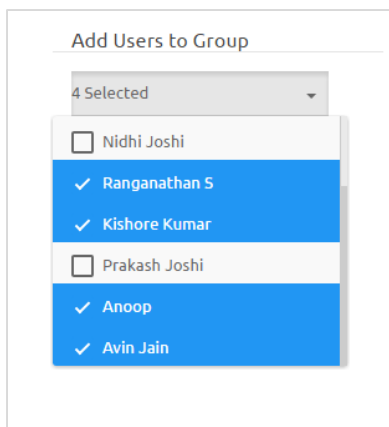


Enter the following details:

- **Group Name:** Name of the Group
- **Description:** Any description related to the group

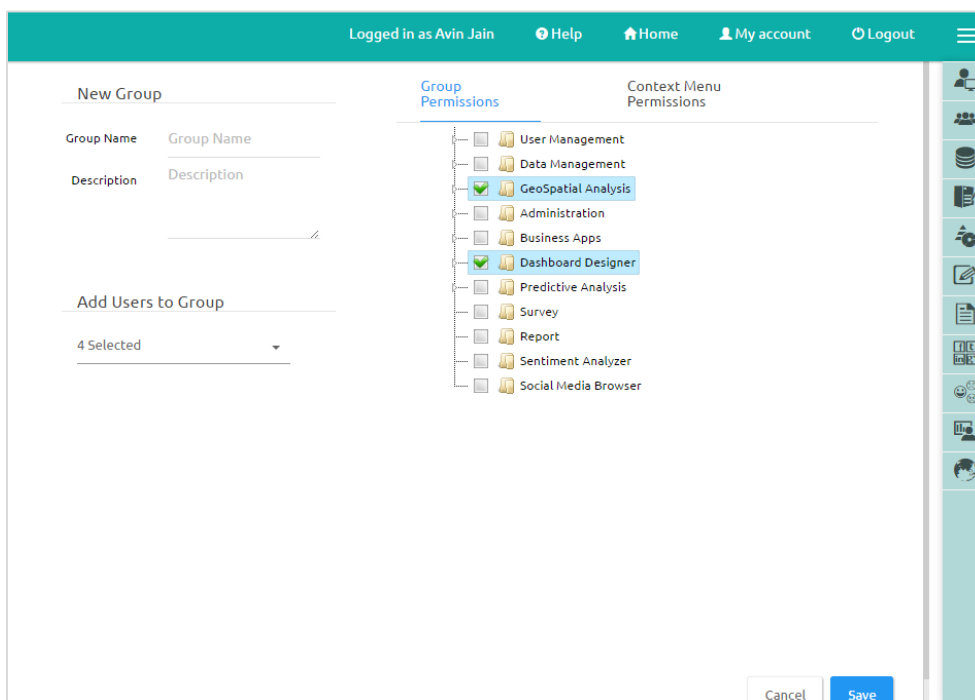
**b. Add Users to Group**

Select the users by enabling the checkboxes provided to assign them to the created group. (See below)



**c. Provide Group Permissions**

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



Click on 'Save' button to apply the changes.