# **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 perfom 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

- i) In the URL bar, enter  $\rightarrow$  <u>http://apps.bdbizviz.com/app/index.html</u>
- ii) Enter your credentials to Login

В	
Email	
Password	
Enterprise	
	LOGIN
	Forgot your password

iii) 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)

Business Visualization Analytics Platform		Logged in as Avin Jain	Help	A Home	L My accoun	ıt	QL	ogout	≡
User Group +	Users 🕂 🔻								2
Search UnorGroup	Coareh Henr								-
	Search Oser					view	s 6 OUC (	or 6 🛰	
All Groups	Nidhi Joshi				1	0	×	1	P
Platform 💉 🤗	Ranganathan S				1	0	×	×	-îo
Platform Users 💉 🤗	Kishore Kumar				1	0	×	×	
MyGroup 🧪 🗸	Prakash Joshi				1	0	×	×	
Partners / /	Anoop				1	0	×	×	
BI Testing 🖉 🦉	Avin Jain Email-avin.jain@bdbizviz.com				1	0	×	×	00
Administrator									<b>•</b>
									1

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

Business Visualization Analytics Platform	BizViz			Logged in as Avin Jain	🛛 Help	<b>☆</b> Home	L My account	🖱 Logout	≡
User Group		+	New User						\$
Search UserGroup	Views 6 out o	of 6 Q	Email	Email					-
All Groups			Short Name	Short Name					
Platform		_	Full Name	Full Name					₿
Flactorin			Third Death User	Third Destrollars					ô
Platform Users	1	0	Third Party User	Description					Ø
MyGroup	1	1	Description	beachpaon					
Partners	1	*				/i			ft Eg
BITesting	1	0	Password	Password					90 90
Administrator	1		Confirm Password	Confirm Password					<u>•</u>
			Custom Fields	+					0
			Add User to Group						
			User Group	Select Any One		-			
							Cancel	Save	

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

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- 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

Business Visualization Analytics Platform		Logged in as Avin Jain	🕄 Help	<b>☆</b> Home	L My accour	nt	٥L	ogout	≡
User Group +	Users 🕂 🔻								\$
Search UserGroup Views 6 out of 6	Search User					Manu	e é outra		-
	black i contra					view:			
An oroups	Niani Joshi					0	*	_	
Platform 🖉 🖉	Ranganathan S				1	0	×	1	ŵ
Platform Users 💉 🖉	Kishore Kumar				1	0	×	*	Ø
MyGroup 🧨 🖌	Prakash Joshi				1	0	×	×	
Partners 📝 🖌	Anoop Email-anoop.vp@bdbizviz.com				1	0	×	×	ft DE
BITesting 🖉 🦉	Avin Jain				1	0	×	×	9 <sup>0</sup> 0
Administrator 🗸 🗸									<b>E</b>
									0

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

Business Visualization Analytics Platform	BIZVIZ		Logged in as Avin Jain	🛛 Help	<b>↑</b> Home	💄 My account	🖱 Logout	≡	
User Group	+	New Group	Group Permissions		Context M Permission	lenu ns		2	
Search UserGroup	Views 6 out of 6 Q	Group Name Group Name	Mandatory: Se	elect atleast one j	permission		_	*	
All Groups		Description Description		Data Managerr GeoSpatial An	nent alvsis				
Platform	10		4 🔤 🛴	Administration	1			-ô	
Platform Users	1 0			Business Apps	sianos				
MyGroup	1.1	Add Users to Group		Predictive Ana	lysis				
Partners	1.1	Select Any One 👻		Survey Report					
BITesting	1 0	Search	- 4	Sentiment Ana	alyzer			00	
Administration		Select All	· · · · · · · · · · · · · · · · ·	Social Media B	rowser			<b>.</b>	
	· · · ·	🔲 Nidhi Joshi						1	
		Ranganathan S							

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.

			Logged in as Avin Jain	3 Help	🔒 Home	👤 My account	🖰 Logout	≡
New Grou	р		Group		Context M	enu		2
с. н.	C N				Fermission	15		<u></u>
Group Name	Group Name			User Manageme	ent			
Description	Description			GeoSpatial Anal	ysis			
			🔲 🦾	Administration				B
		/ı	- 💷 🚇	Business Apps				-ô
			e 💌 🔎	Dashboard Desi	gner			
Add Users	to Group			Predictive Analy	/sis			
	·			Survey				
4 Selected	•	_		Sentiment Analy	yzer			ft ing
				Social Media Bro	owser			88
								1
						Cancel	Save	

Click on 'Save' button to apply the changes.