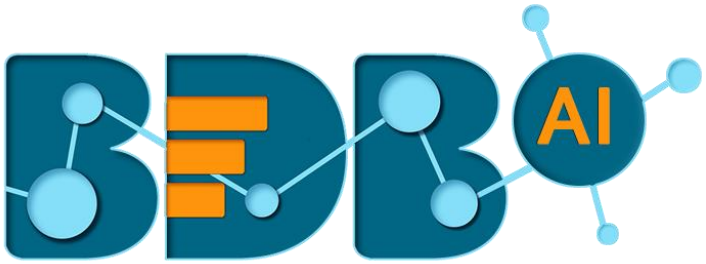

How to Guide

User Management R-4.5

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1. About this Guide

1.1. Overview

This guide covers steps to create and manage individual user(s) and User Group(s) and the permissions provided to the various user(s) and group(s).

1.2. Target Audience

This guide is aimed at system administrators who need to create various users and user groups using the BDB Platform.

1.3. Supported Web Browsers

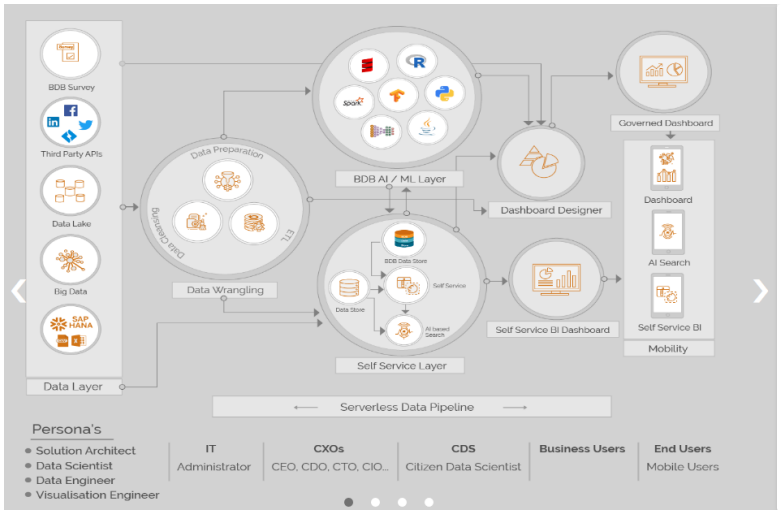
The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

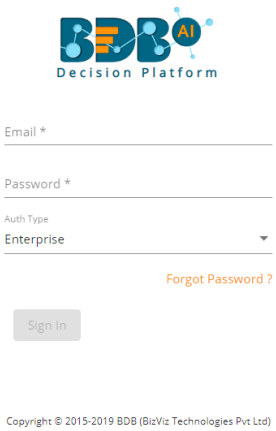
Mozilla Firefox/ Firefox ESR	Latest Version
Microsoft Internet Explorer	11
Microsoft Edge	Latest Version
Apple Safari	10
Google Chrome	Latest Version (recommended web browser)

2. Getting Started with the BDB Platform

This section explains how to access the BDB Platform and a variety of plugins that it offers:

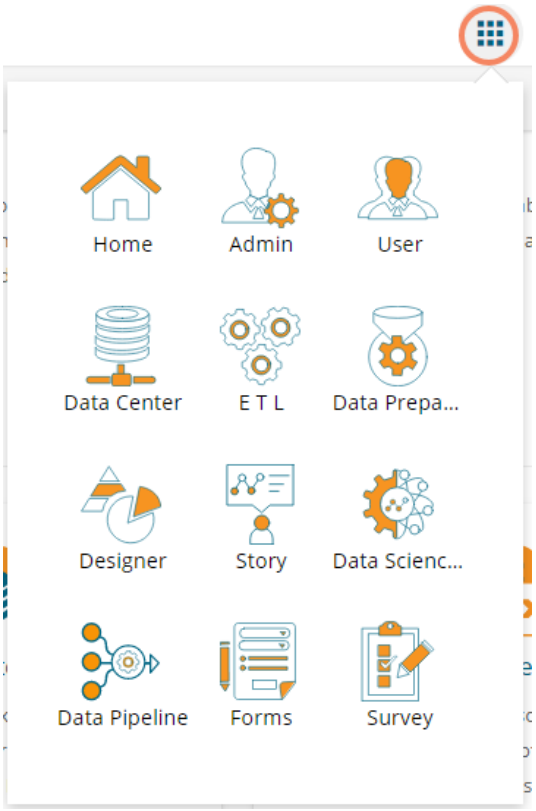
i) Open BDB Enterprise Platform Link: https://app.bdb.ai
ii) Enter your credentials to log in.
iii) Select an '**Auth Type**' option using the drop-down menu.
iv) Click the '**Continue**' option.





v) BDB Platform homepage opens.
vi) Users get redirected to the BDB Platform homepage.

vii) Click the '**Apps**' icon from the header bar.
viii) It opens a panel displaying all the available plugin applications.



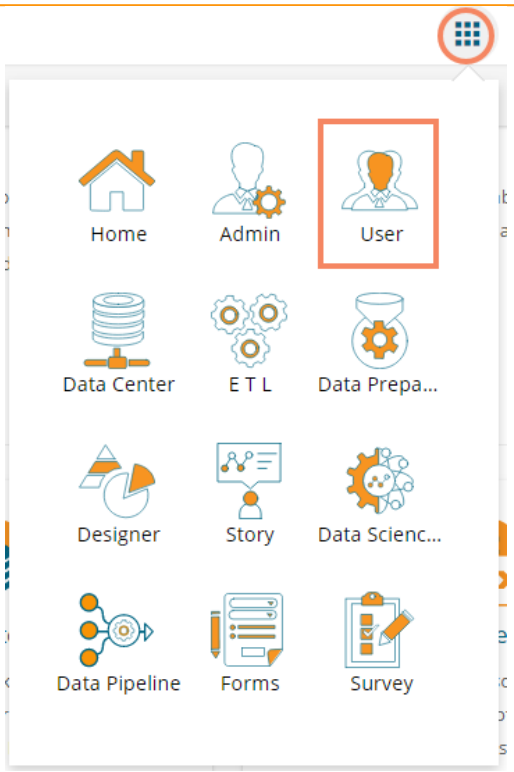
Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

3. User Management

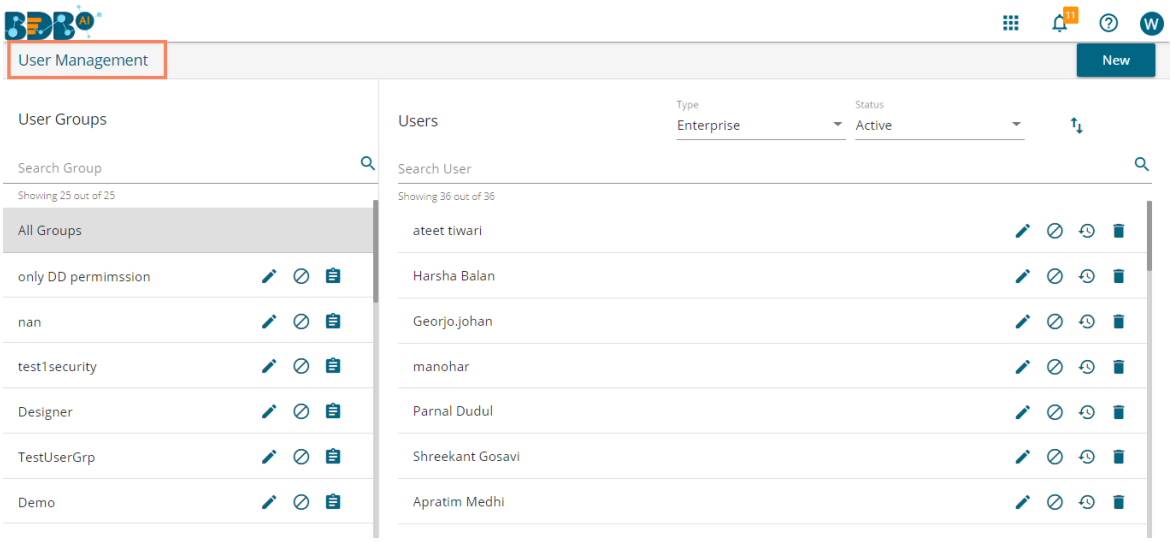
This section describes how to create a user or user group in the BDB Platform. A newly formed user must be added to a user group to access the various platform application.

3.1. Accessing the User Management Page

i) Select the '**User**' plugin from the Apps menu.



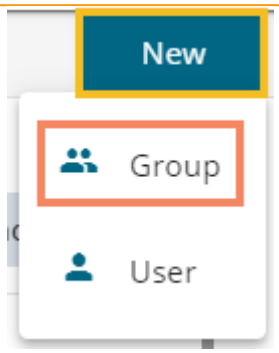
ii) The User Management landing page opens.



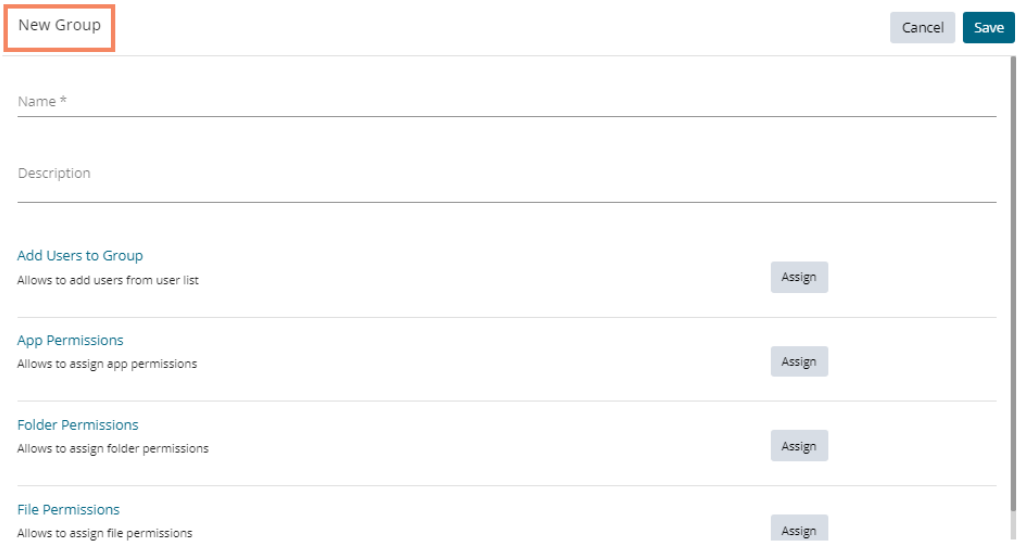
Note: The admin can search for a specific user or group by using the '**Search**' options.

3.2. Creating a New User Group

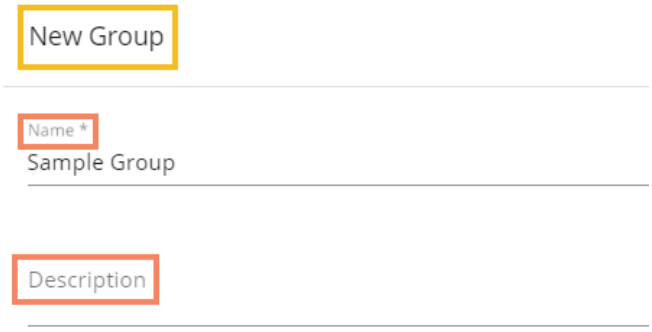
i) Click the '**New**' option.
ii) A context menu opens.
iii) Select '**Group**' option from the context menu.



iv) A new window asking information for a new group opens.



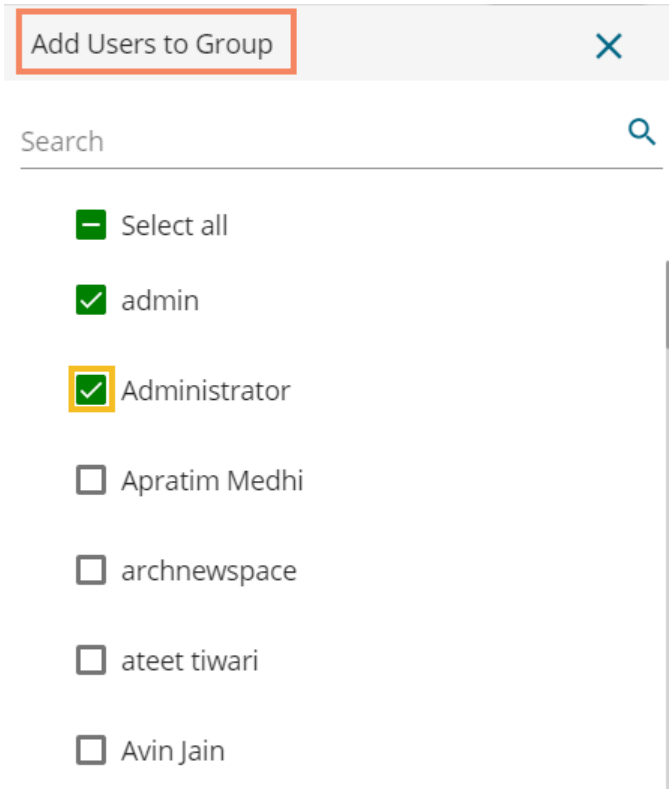
v) Provide the following information to create a new User Group:
   a. **Group Name:** Enter a name for the user group (The group name should not exceed 20 words)
   b. **Description:** Describe the user group (optional) (The description should not exceed 150 words)



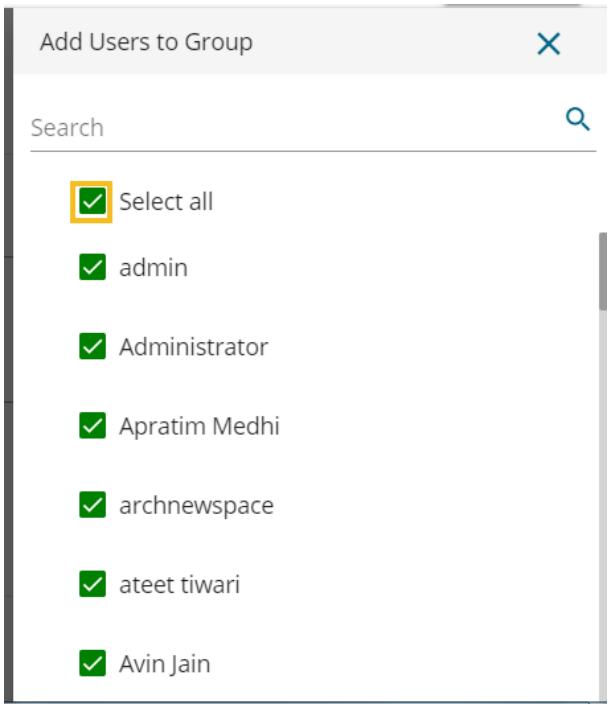
   c. **Add User to Group**:
      i. Click the '**Assign**' option provided for adding the existing users to the newly created group.

      ii. A new window opens with a list of all the existing users to that space.

iii. Select User(s) by using a checkmark in the box from the displayed list of users.



Note: Use checkmark in the box provided for the 'Select all' option to select all the existing users.

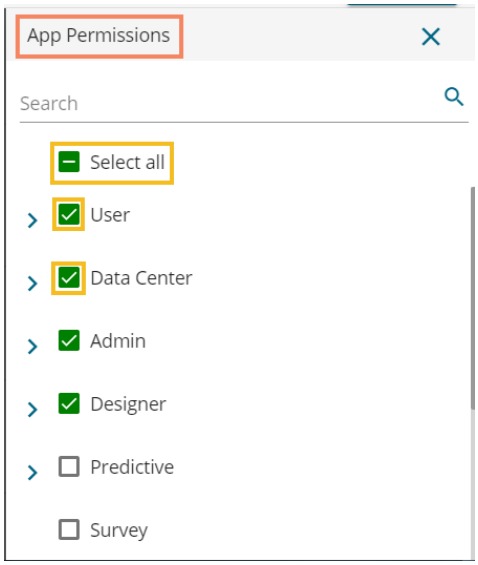


d. **App Permission**:

i. Click the '**Assign**' option provided to add various app permission to the newly created group.

ii. A new window opens with the list of the available apps to select the App Permissions.

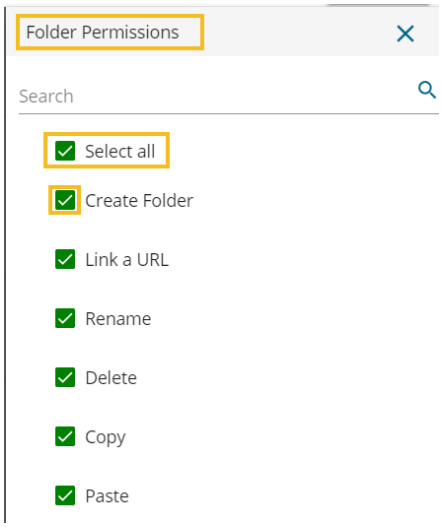
iii. Either choose 'Select all' options to add all the permission or Assign various plugin/app rights by choosing specific plugin option to the newly created User Group via the '**Group Permissions**' menu list (It is mandatory).



e. **Folder Permission**:

i. Click the '**Assign**' option provided next to the Folder Permission option.

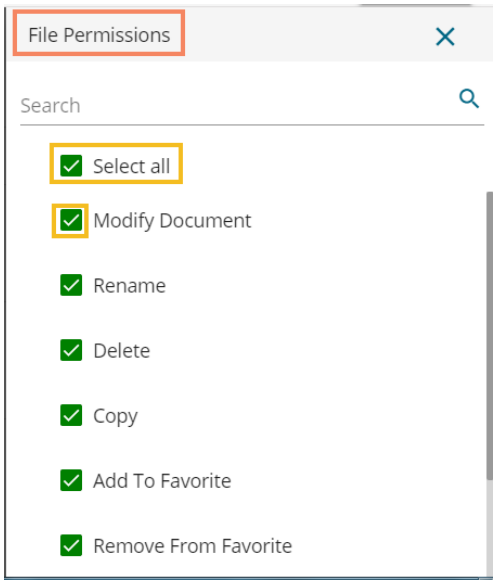
ii. A new window opens with the list of the Folder Permissions to be selected for the group.



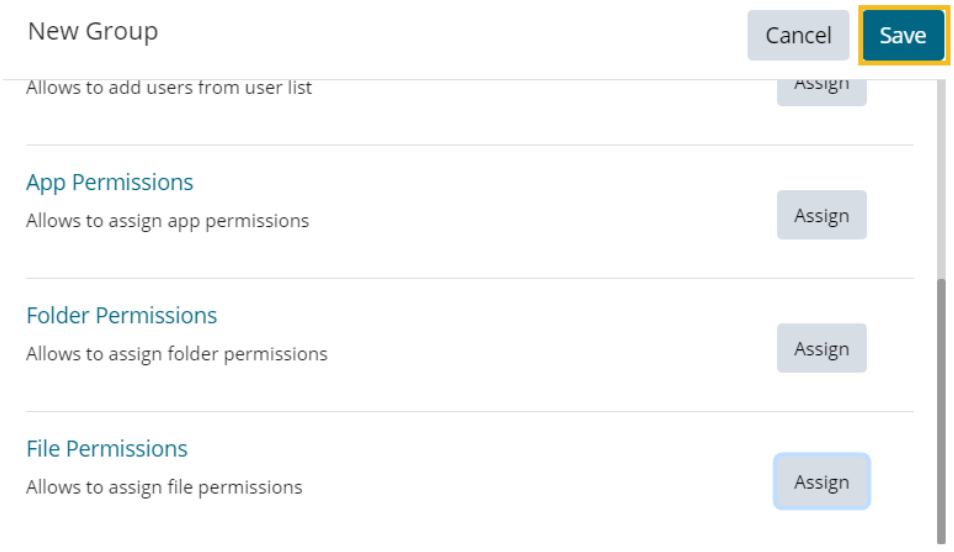
a. File Permissions:

i. Click the 'Assign' option provided for the File Permissions.

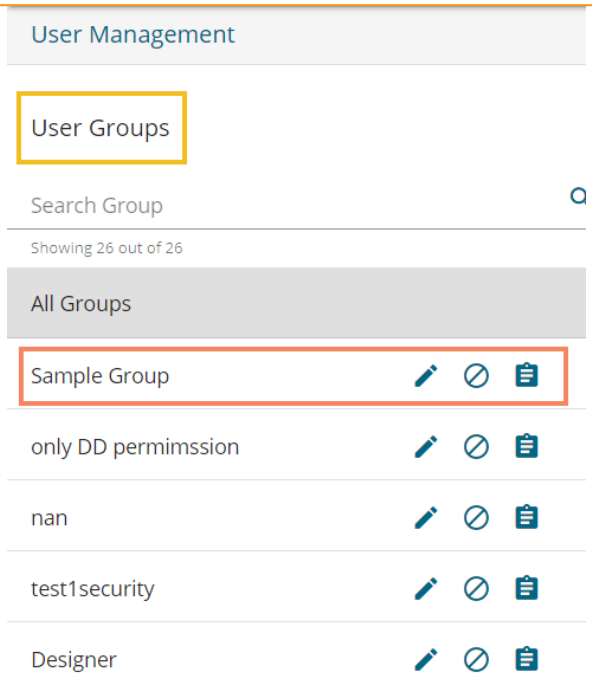
ii. A new window opens with the list of the File Permissions to be selected for the group.



ii) Click the **'Save'** option provided for the User Group.



iii) The newly created group will be listed under the '**All Group**' list (as shown below):



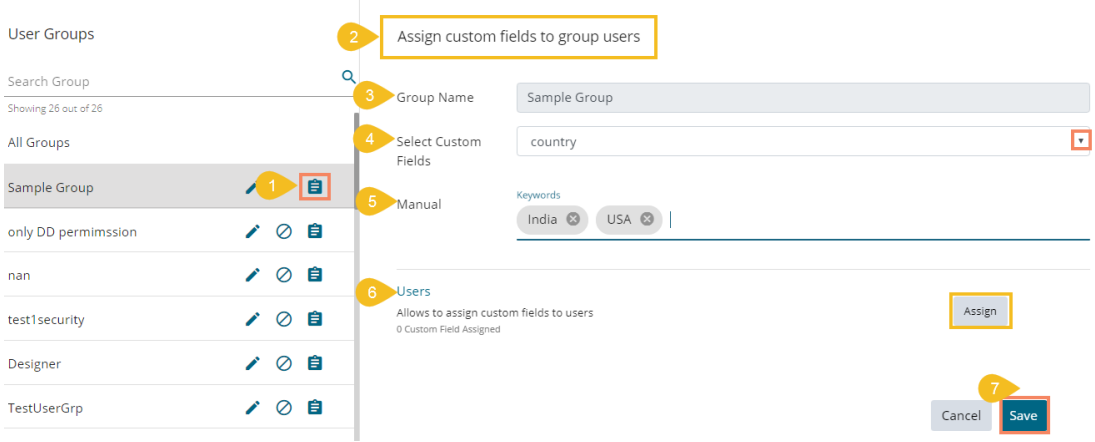
Note: Users can apply the following actions on a created user group.

Option	Name	Description
	Edit	To edit details for the selected user group
	Activate Group	To activate the selected user group
	Block Group	To block the selected user group
	Assign Custom Fields	To assign the group-specific custom fields.

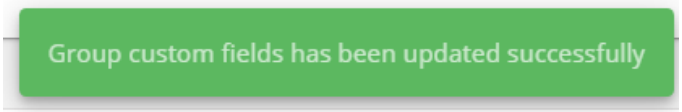
3.2.1. Assigning Group Custom Fields

This feature is provided to assign values to the custom fields.

i) Click '**Assign Custom Field**' option provided next to a user group.
ii) The '**Assign Custom Field to Group Users**' page opens.
iii) Select a Custom Field using the drop-down list.
iv) The 'Manual' field appears to insert the Keywords for the selected custom field.
v) Click the '**Add**' icon to select user.
vi) Click the '**Save**' option.



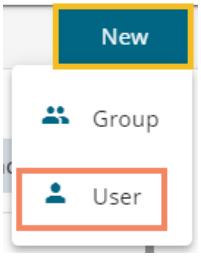
vii) A message will pop-up to assure that the group custom fields are updated successfully.



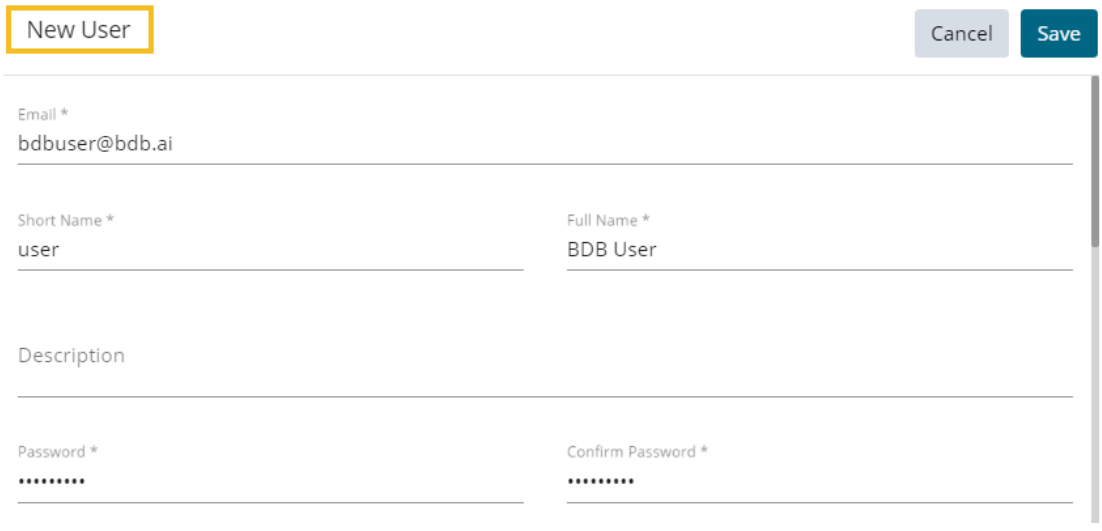
Note: The default user groups do not have the '**Edit**' and '**Block**' icons –E.g., Admin Role and Viewer Role.

3.3. Creating a New User

i) Click the '**New**' option.
ii) A context menu opens.
iii) Select the '**User**' option from the context menu.



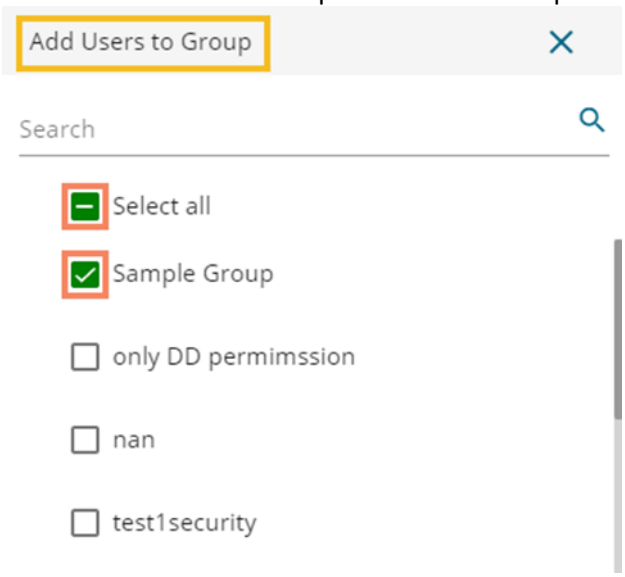
iv) The '**New User**' form opens.
v) Fill in the following information to create a new User:
   a. **Email:** Email address
   b. **Short Name:** Short name of the user
   c. **Full Name:** Full name of the User
   d. **Description:** Describe the user (optional)
   e. **Password: Set** password for the new user
   f. **Confirm Password:** Confirm the above password



vi) Click the '**Assign**' option provided for Adding the new User to Group(s).

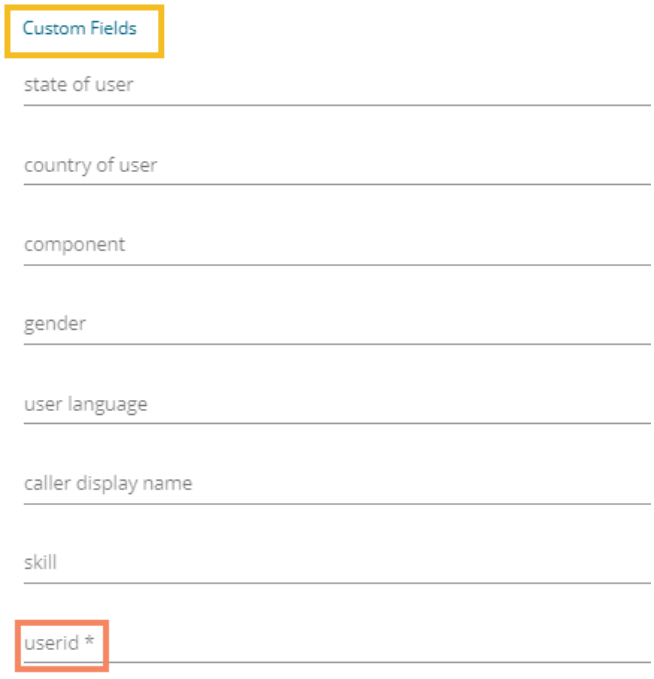
vii) A window opens listing all the groups.

viii) Either choose '**Select all**' option or select the specific group(s) by using the checkmarks.



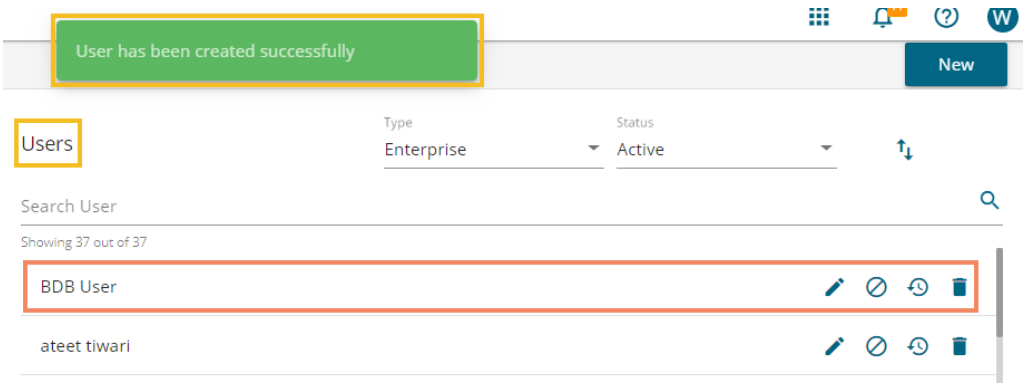
ix) The selected group(s) will be assigned, and the number of the selected groups gets mentioned.

x) Preconfigured custom fields display in this form. Users need to provide the required details using the custom fields if marked as mandatory (A user gets group-specific custom fields).



xi) Click the '**Save**' option

xii) A success message appears.
xiii) The newly created user gets added to the user list.



Options	Name	Description
	Edit	Update/Edit the user-specific details for a selected user
	Block	Block the selected user
	Remove	Remove the selected user from the user list
	Reset Password	A Reset password gets sent to the registered user email

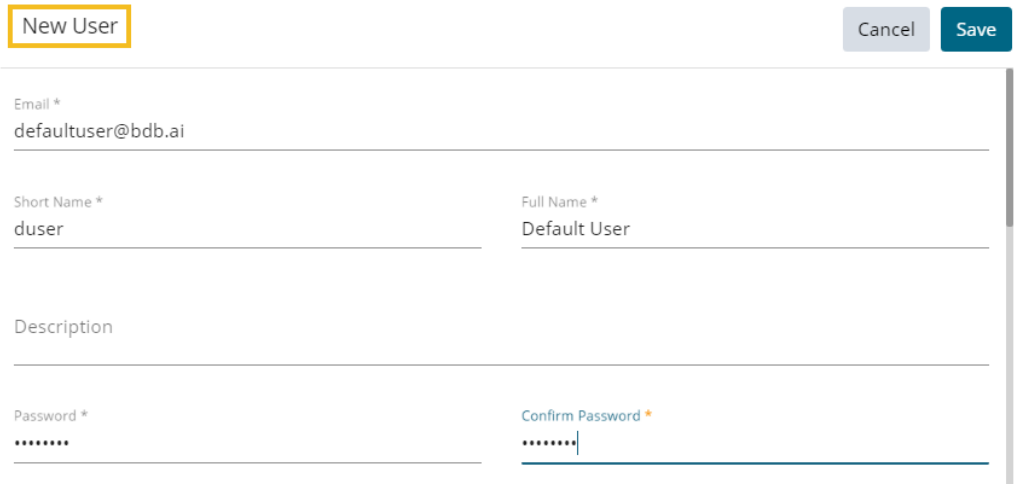
Note:

a. All the user-specific details other than email id can be updated/edited by the Update User option.
b. If the new user gets added to the Admin Group, the new user becomes an admin.
c. A single user can be a part of multiple groups.

3.3.1. Default User Role

All the new users created via the User Management Module are added to a default role (the viewer role). The default user role restricts all new users from accessing any of the Platform plugins until they are attached to some user group.

i) Select the '**User**' option from the '**New**' context menu.
ii) The '**New User**' form opens.
iii) Provide the required information to create a new user.

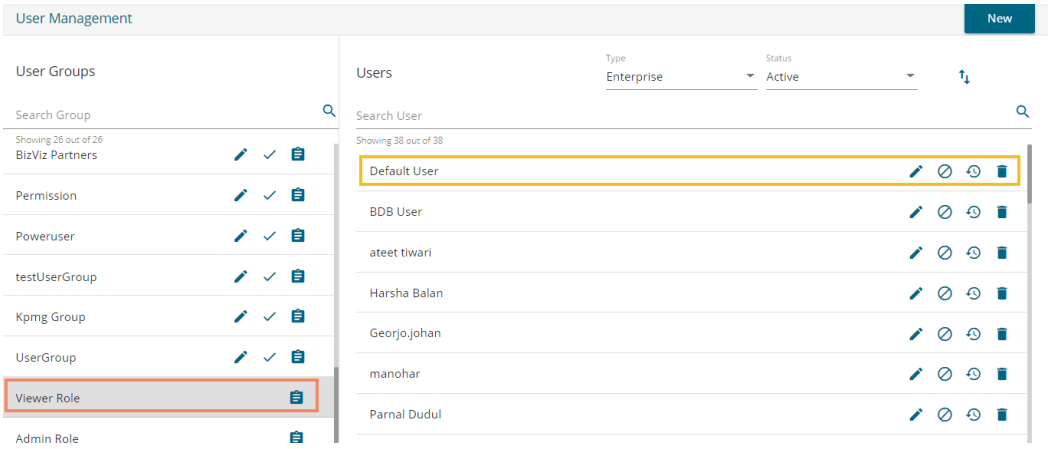


iv) Do not add the user to any group.

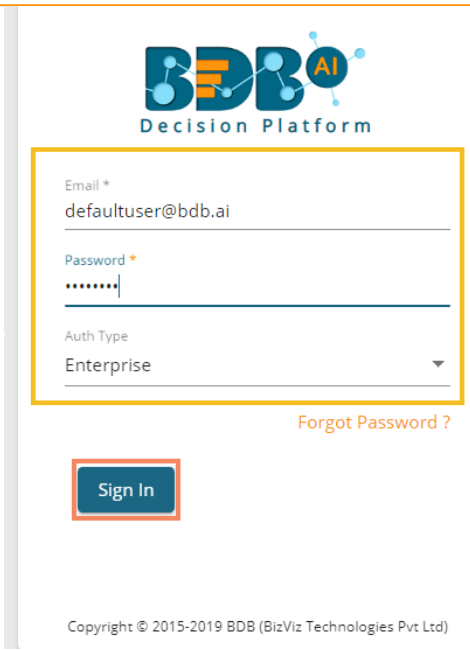
v) Provide the '**Custom Fields**' details for the new user (If marked as mandatory).

vi) A success message appears.

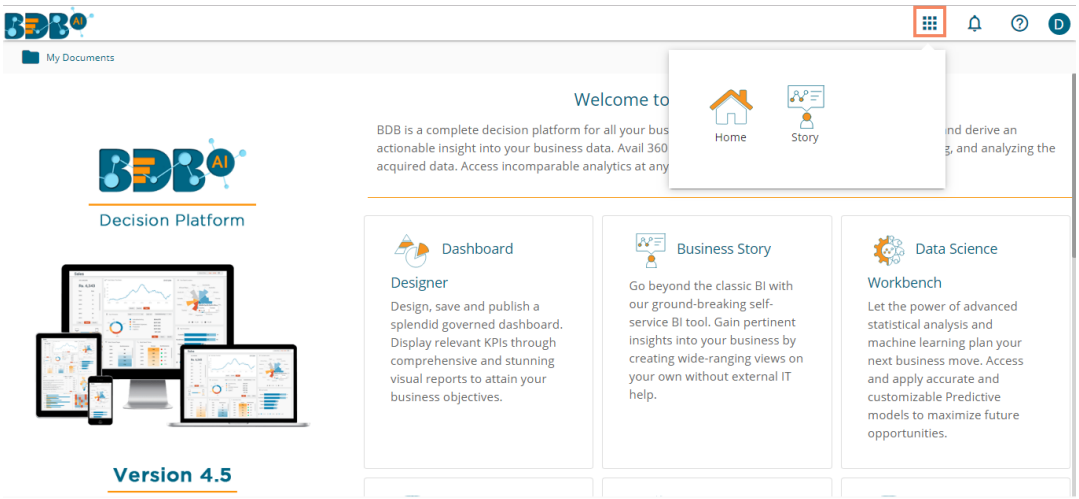
vii) The user gets created and added to the list of users (By default the newly created user is added to the Viewer Role User Group).



viii) Navigate to the '**Sign In**' page of BDB platform and use new user's credentials to access the Platform.



ix) Click the '**Apps**' option. The new user can access the platform homepage, but not the platform plugins.



Note: The BDB Platform provides some category of users (as explained below):

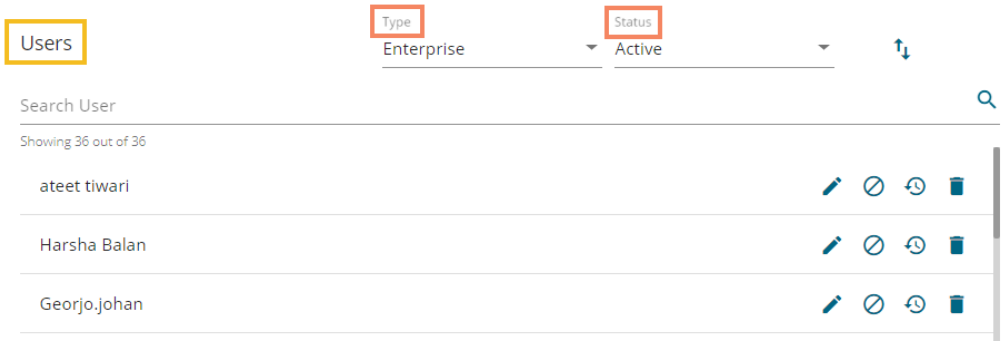
1. **Viewer Role**: Any new user created under the BDB Platform who is not added to any user group falls into this user role by default.
2. **Admin Role**: The user who is a part of Admin Group gets the permissions to access all the BDB Plugins which are provided to the group.
3. **Ordinary User Role:** The user allocated to any group other than Admin Role with the credited permissions from the group fall into this category.

3.4. User Status

This feature helps the administrator to identify the various status of system users and enable an expired user account.

i) Navigate to the User Management page.
ii) Users can see two drop-down menus.

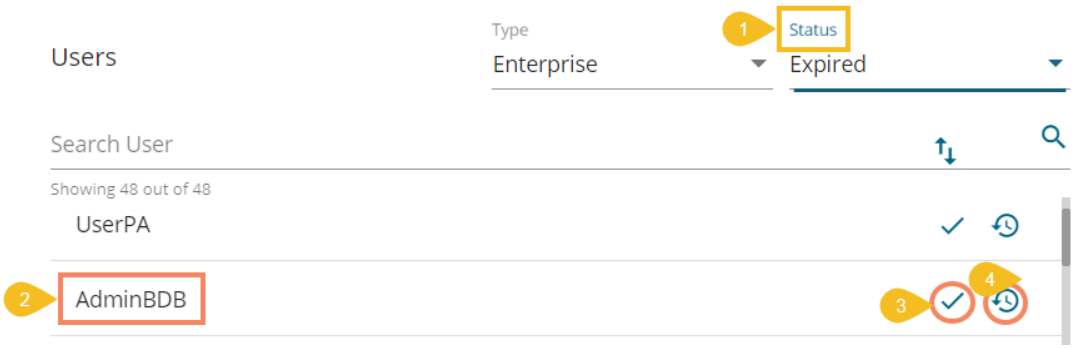
a. **Type**: It contains the following authentication types as drop-down options
   i. Enterprise
   ii. Window AD
   iii. CA PPM
b. **Status**: It includes the following user status as drop-down options
   i. Active
   ii. Blocked
   iii. Expired
   iv. Deleted



Note: Users can select any combination of the filter values mentioned above to display filtered/customized lists of users.

3.4.1. Activating an Expired User Account

i) Select '**Expire**' as the status option
ii) A list of all expired user accounts/ groups appears
iii) Click the '**Activate**' ✓ icon to activate a specific user/user group
iv) Click the '**Reset Password**' option ↻ to set a new password for an activated user



Note: By clicking '**Activate**,' an expired user account can be activated. The user can use the old password. However, when the user uses the '**Reset Password**' option, the same user gets activated with a new password (In this case, the user needs to set a new password).

4. My Account

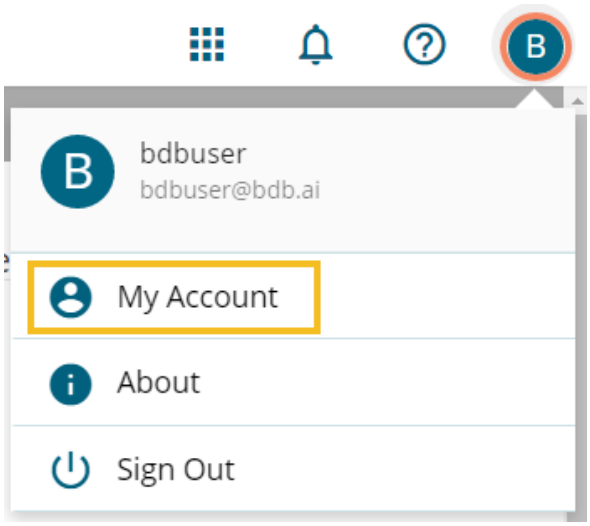
This section covers three options to manage settings for a user account.

i) Navigate to the Platform homepage.

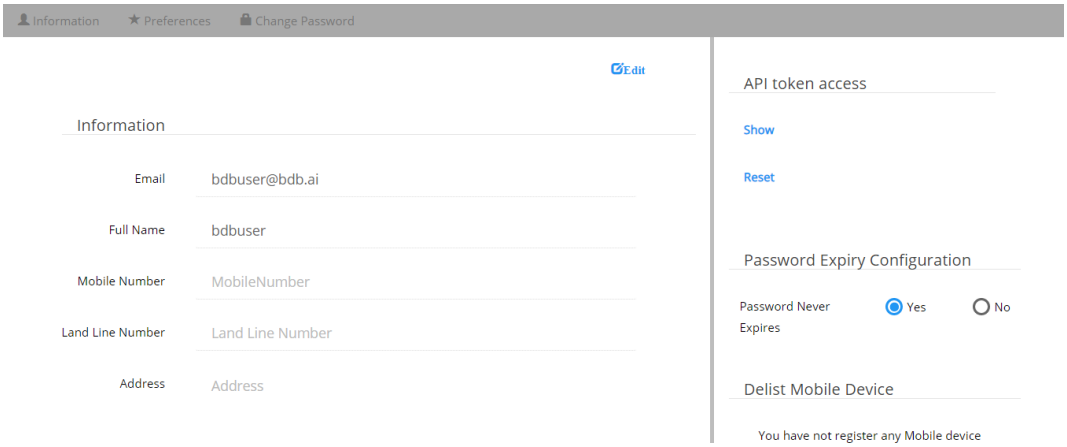
ii) Click the '**User Profile**' icon.

iii) Details of the logged-in user displays.

iv) Click the '**My Account**' option.



v) The following page opens.



Note: By clicking the user icon, the '**Information**' tab opens by default.

4.1. Information

This module displays personal information about the user.

i) Click '**Information**' on the My Account menu row

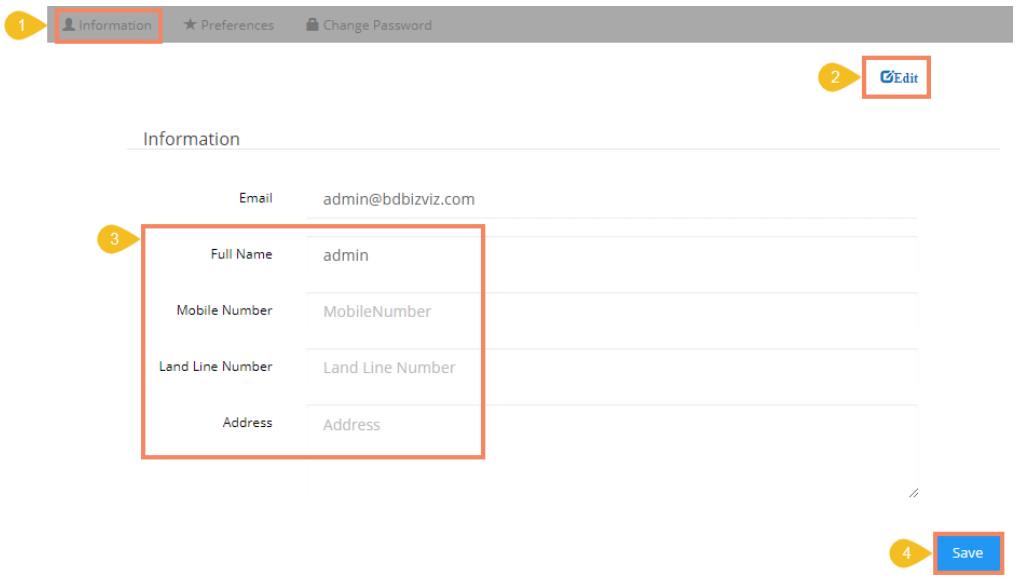
ii) Click the 'Edit' option

iii) The following details display

- Email (not editable)
- Full Name
- Mobile Number

- Land Number
- Address

iv) The user can modify/change the required details except for the email and click the '**Save**' option.



v) The user information gets saved.

Note:

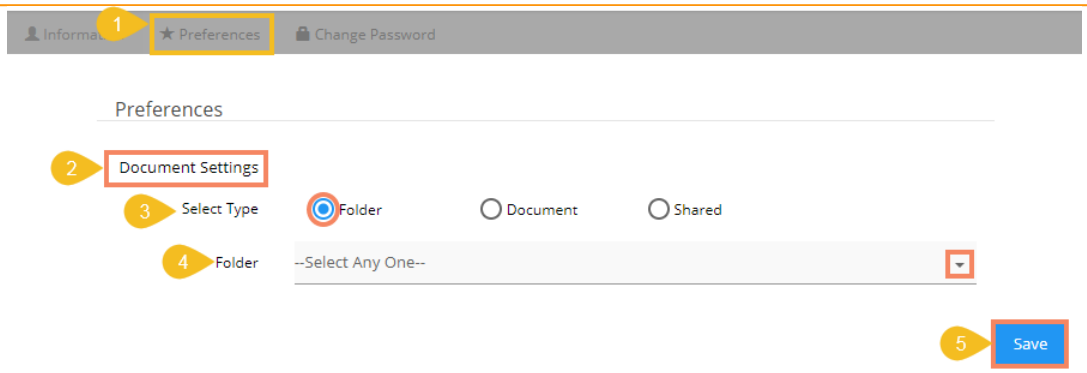
a. It is mandatory to click the '**Edit**' option to enter/modify the user information.
   Steps to edit the Information:
   Click '**Edit**' -> Modify/ Change the details -> Click '**Save**'
b. Users can modify the other profile information except for the Email by using the '**Information**' tab.

4.2. Preferences

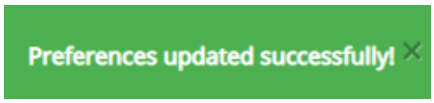
The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

i) Click '**Preferences**' using the My Account menu row.
ii) The '**Document Settings**' option appears.
iii) Use a radio button to select either of the choices out of:
   a. Folder
   b. Document
   c. Shared
iv) As per the selected choice, a drop-down menu appears (E.g., The following image displays 'Folder' drop-down since Folder is selected from the Select Type).
v) Select a folder (or document) from the respective drop-down menu.
vi) Click the '**Save**' option.



vii) A pop-up message appears to assure that the preferences have been updated.

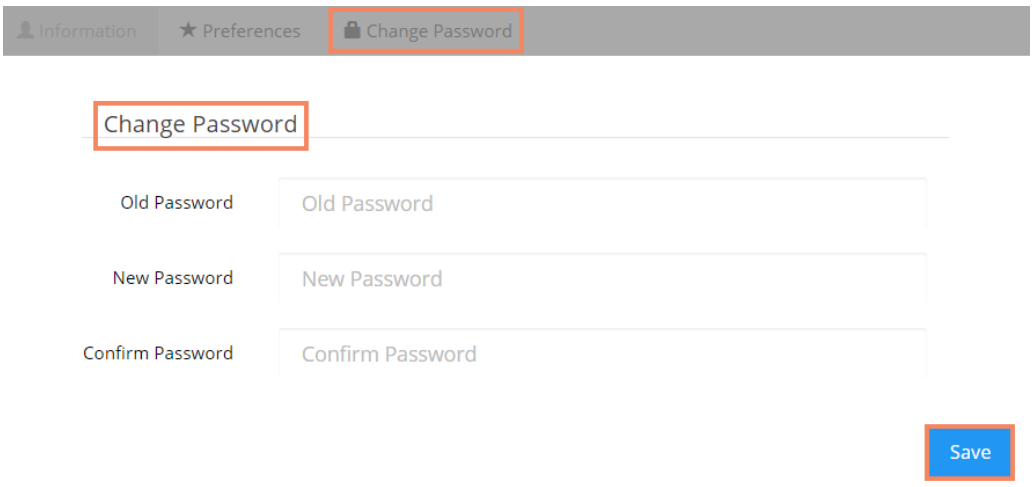


Note: Folders and documents get displayed to the users as per the set preferences by the Administrator.

4.3. Changing Password

The user can reset the password for his account using this segment.

i) Click '**Change Password**' on the My Account menu row.
ii) A new page opens.
iii) Enter '**Old Password**,' '**New Password,**' and '**Confirm Password**' (the newly set password).
iv) Click the '**Save**' option.



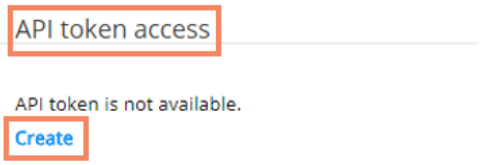
v) The password gets changed.

4.4. Other Related Options

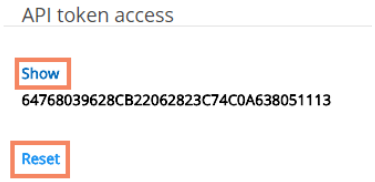
The API Token and Mobile Device access codes are displayed in the right pane of the '**My Account**' page. The Password Configuration can be accessed via the same page.

a. API Token

- It is an authentication token that is used to expose the document as an open document.
- API token can be accessed and reset using the '**My Account**' option.
  a) Click the '**Create**' option

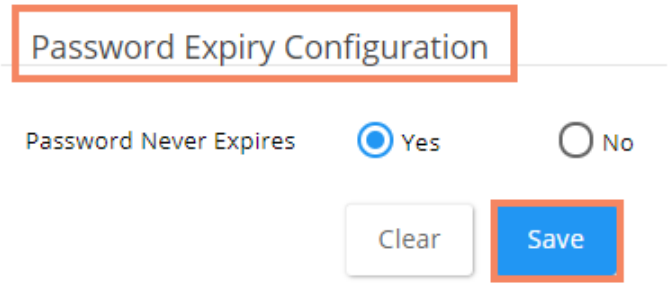


  b) A new API token gets created.
  c) The following details appear after creating an API token
    a. Show: By clicking this option the API token is displayed
    b. Reset: By clicking this option the API token gets reset



b. Password Expiry Configuration

i. Password expiry limit can be configured via this option.
ii. The user needs to select either of the choices for the '**Password Never Expires**' out of '**Yes**' or '**No**' options.
iii. Click the '**Save**' option.

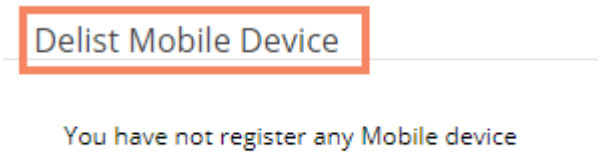


Note: By selecting 'Yes' via the password expiry configuration section, the user's password will never get expired.

c. Mobile Device Deregistration

A user can access only one mobile app at a time, to configure another mobile device he must

deregister the registered mobile app. The 'Mobile Device UnRegisration' option helps the user to deregister the registered mobile device.

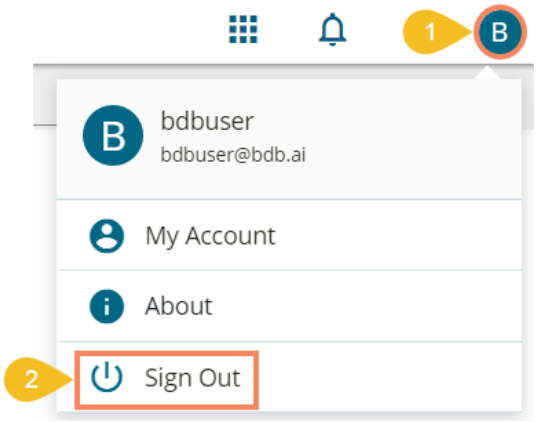


Note: Users need to register the mobile device through the mobile app.

5. Signing Out

The user can close the User section by singing off from the BDB platform.

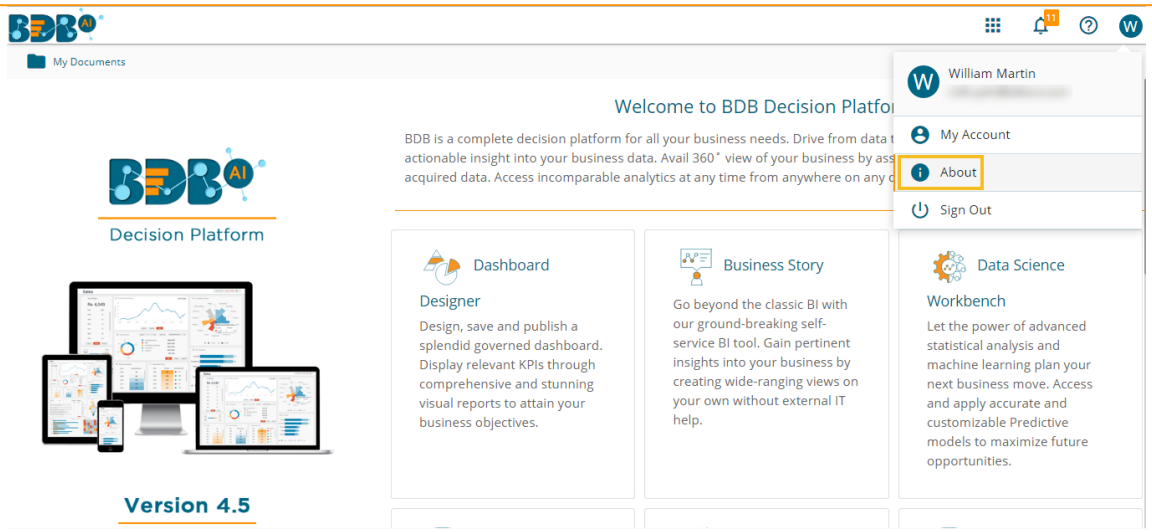
i) Click the '**User Profile**' icon W on the Platform homepage.
ii) Click the '**Sign Out**' option.



iii) The user successfully signs off from the **BDB Platform.**

Note:

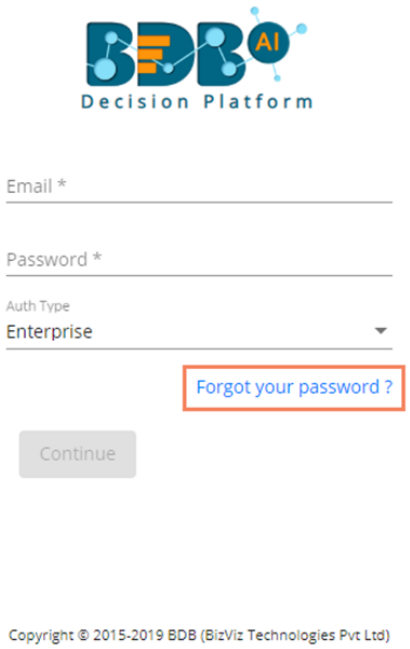
a. By clicking the '**Sign Out**' option, the user gets back to the Sign-in page of the BDB platform.
b. Click the '**About**' option to open the default welcome page of the BDB Platform.



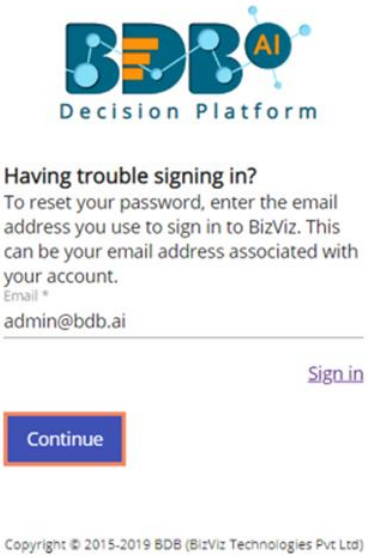
5.1. Forgot Password Option

The user is provided with a choice to change the password on the Sign In page of the platform.

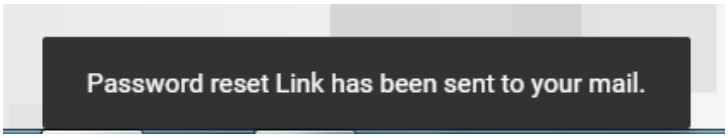
i) Navigate to the Login page.
ii) Click the '**Forgot your password?**' option.



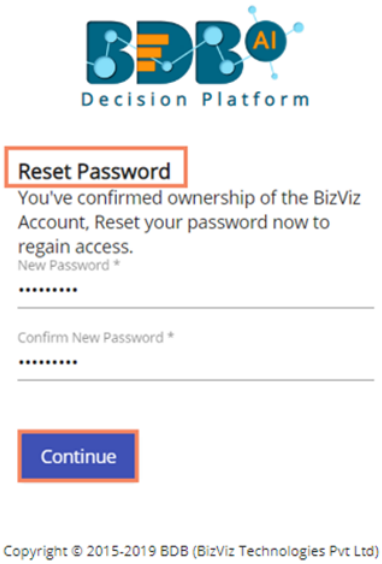
iii) A new window opens.
iv) Provide the email id that is registered with BDB to send the reset password link.
v) Click the '**Continue**' option.



vi) Users may be redirected to select a space in case of multiple spaces under one server link(They need to select a space and click the 'Continue' option once again). If users do not have multiple spaces then, a message appears to notify the user that about the password reset link (The users receive the reset link via their registered email.)



vii) Click the link from your registered email.
viii) Users get redirected to the '**Reset Password**' page to set a new password.
ix) Set a new password.
x) Confirm the newly set password.
xi) Click the '**Continue**' option.

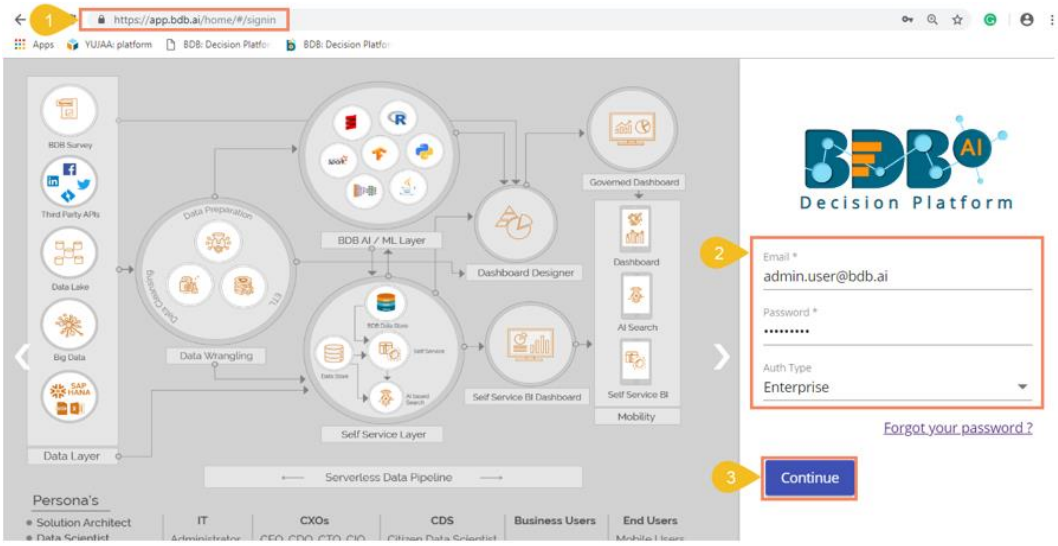


xii) The password for the selected BDB account gets reset.

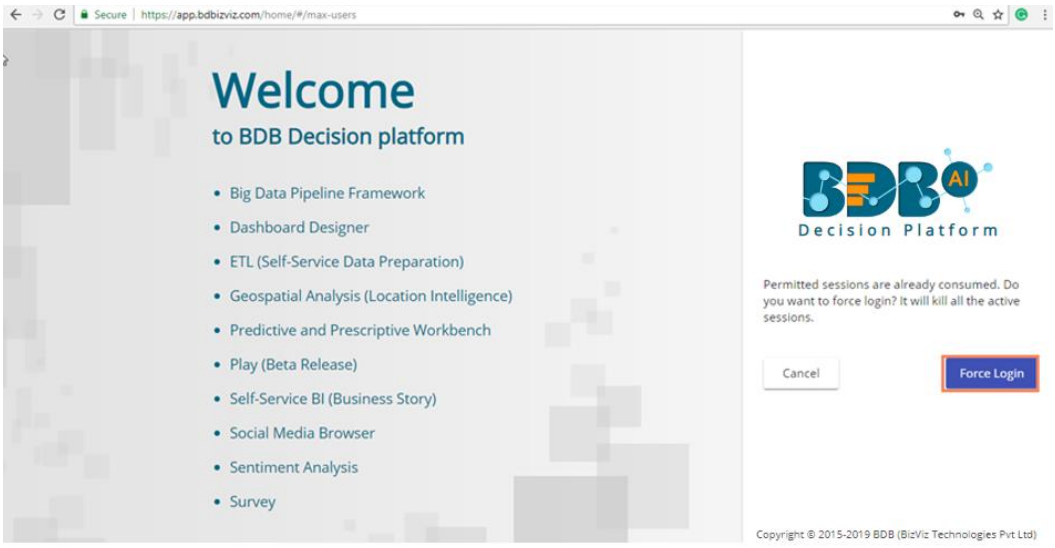
5.2. Force Login

The '**Force Login**' functionality has been introduced to control the number of active sessions up to three. The users can access only 3 sessions at a time when they try to access 4th session a warning message displays to inform that the user has consumed the permitted sessions and a click on the '**Force Login**' would kill all those active sessions.

i) Navigate to the BDB Platform Login page.
ii) Enter the valid credentials to log in.
iii) Click the '**Continue**' option.



iv) The user gets the following message if the user already consumes the permitted active sessions (3 sessions at a time).
v) Click the '**Force Login**' option.



vi) A warning message appears that the currently active sessions are killed for the user and the user is redirected to the '**Log In**' page of the BDB Platform.

Note: The user can successfully login to the BDB Platform after selecting the '**Force Login'** option to log in the platform.