



Chapter 3: BIZUIT Dashboard

In this chapter, we'll explore BIZUIT Dashboard, a powerful tool that simplifies the way we manage our daily activities. Designed to fit the specific needs of each organization, this work portal gives us centralized access to key business applications, advanced analytics tools, and intuitive configuration that drives efficiency and productivity. With BIZUIT Dashboard, we not only organize our tasks, but also gain a clear overview of processes in real-time, allowing us to anticipate challenges and make informed decisions.

Throughout this chapter, we will discover how this platform becomes an indispensable ally for administrators, analysts, and end users, providing an experience tailored to their specific roles. From customizing views and menus to configuring notifications and detailed monitoring, the BIZUIT Dashboard is designed to transform the way we work and improve our responsiveness to day-to-day challenges.

Ideal Audience

This chapter is designed for professionals interested in the management and development of BPM (Business Process Management) projects, including process analysts, process designers, and BPM developers, who seek to delve into the practices and tools necessary to optimize business process management.

Objectives

1. Manage the BIZUIT Dashboard Work Portal: Learn how to manage the portal where users interact with business applications, manage tasks, and monitor processes.
2. Monitor and manage business processes in real time: Learn how to monitor and manage business process execution in the Dashboard.
3. Set up users, roles, and permissions in the Dashboard: Learn how to set and manage user roles and permissions for secure and appropriate access in the portal.



Unit 1: Introduction to BIZUIT Dashboard

Welcome to the first unit on Bizuit Dashboard. This unit is dedicated to introducing us to our platform's work portal, a tool designed to optimize our daily activities. Bizuit Dashboard opens the doors to a universe of possibilities, allowing us to access the business applications relevant to our roles and manage them in an efficient and organized way. From case creation to real-time monitoring, each feature is designed to simplify and improve our work experience.

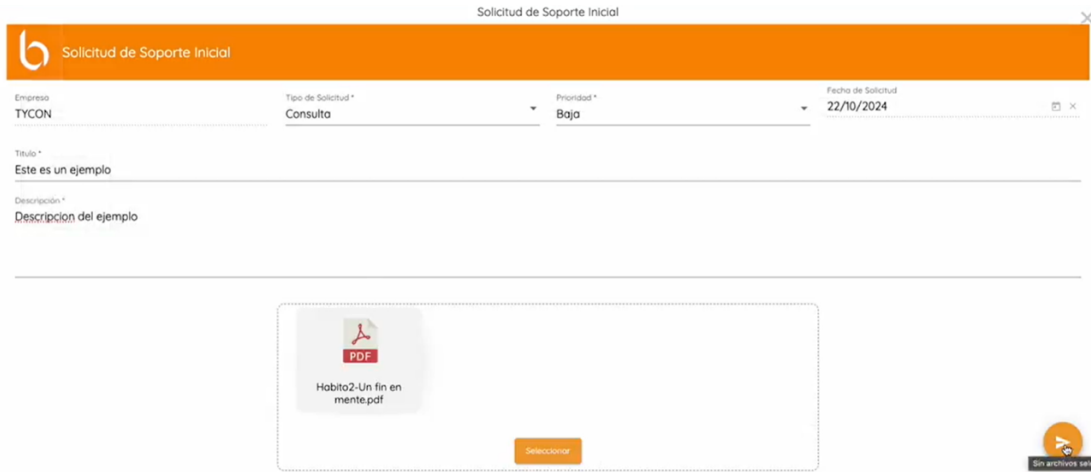
Throughout this unit, we'll explore how this platform not only organizes our tasks, but also offers analytical tools and advanced settings to meet the specific needs of each user, from administrators to analysts to end-users. Bizuit Dashboard is more than just a portal; It's a comprehensive solution that transforms the way we work and make decisions within our organizations.

BIZUIT Dashboard

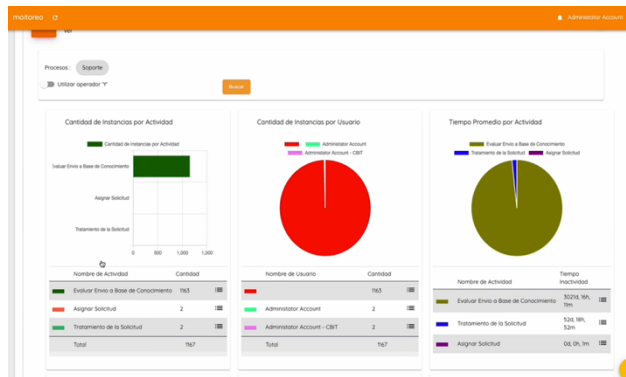
From this portal, we have access to the business applications relevant to our role. This means that we can manage our processes, whether they are those in which we have pending tasks or those in which we can start, thus facilitating the management of our daily activities in a fast and organized way.

Our active tasks are organized so that we can filter by request status, priority, due dates, or any other type of custom filter. This significantly streamlines our decision-making and follow-up on our responsibilities. Creating a case is a simple process: we select the type of process, enter the necessary data, and the system automatically incorporates it into the flow. This allows our tasks to be distributed efficiently, optimizing our time.

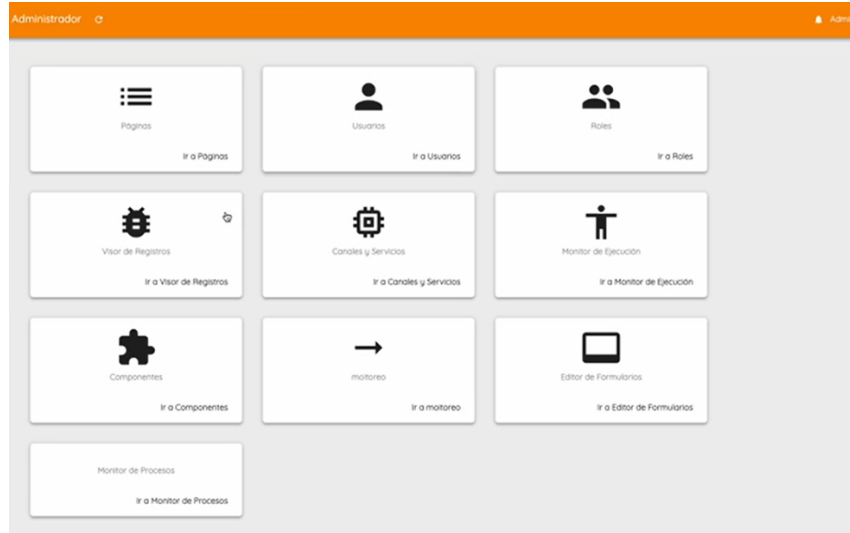
No. Registro	Fec.Reg	Identif. Por	Feccident	Tipo	Cliente - Proyecto	Area - Funcion
202404	12/12/2023 12:42:29	Auditor Externo	2023-12-1212:42:29	OM	SGC	Gestion del conocimiento
202403	12/12/2023 12:37:30	Auditor Externo	2023-12-1212:37:30	OM	SGC	Administracion
202402	12/12/2023 12:32:37	Auditor Externo	2023-12-1212:32:37	OM	SGC	Comercial
202401	12/12/2023 12:28:09	Auditor Externo	2023-12-1212:28:09	OM	SGC	Direccion
202307	15/10/2023 15:57:25	Revision por Direccion	2023-10-1515:57:25	NC	TYCDN	DESARROLLO
202306	03/09/2023 15:56:14	Auditor Externo	2023-09-0315:56:14	OM	SGC	Calidad
202305	03/09/2023 15:56:14	Auditor Externo	2023-09-0315:56:14	OM	SGC	DESARROLLO
202304	03/09/2023 15:56:14	auditor externo	2023-09-0315:56:14	OM	SGC	RREH
202303	03/09/2023 15:56:14	Auditor Externo	2023-09-0315:56:14	OM	SGC	Auditorias Internas
202302	03/09/2023 15:56:14	Auditor Externo	2023-09-0315:56:14	OM	SGC	COMUNICACION



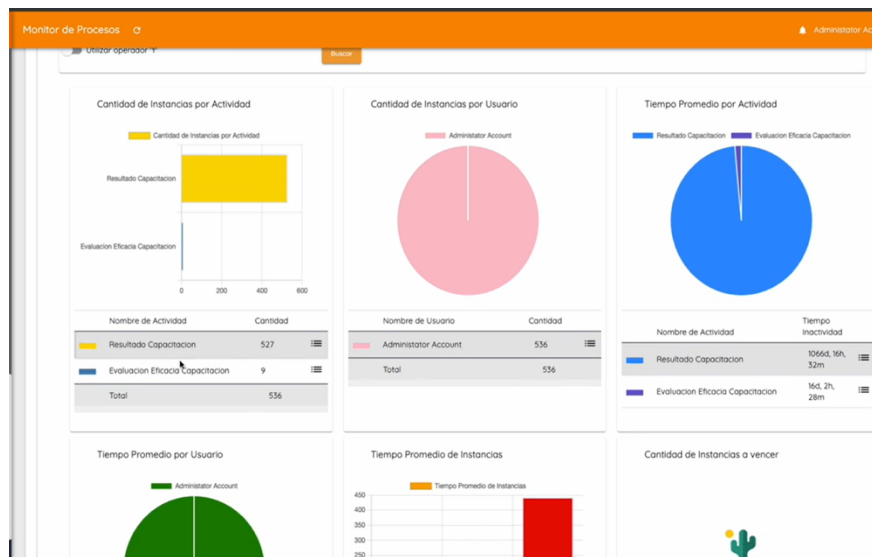
BIZUIT also provides us with real-time monitoring, which allows us to maintain a clear view of the status of each process. This way, we can easily identify any potential delays or bottlenecks that may arise in our operations. This level of vision ensures that we can act proactively in the event of any eventuality.



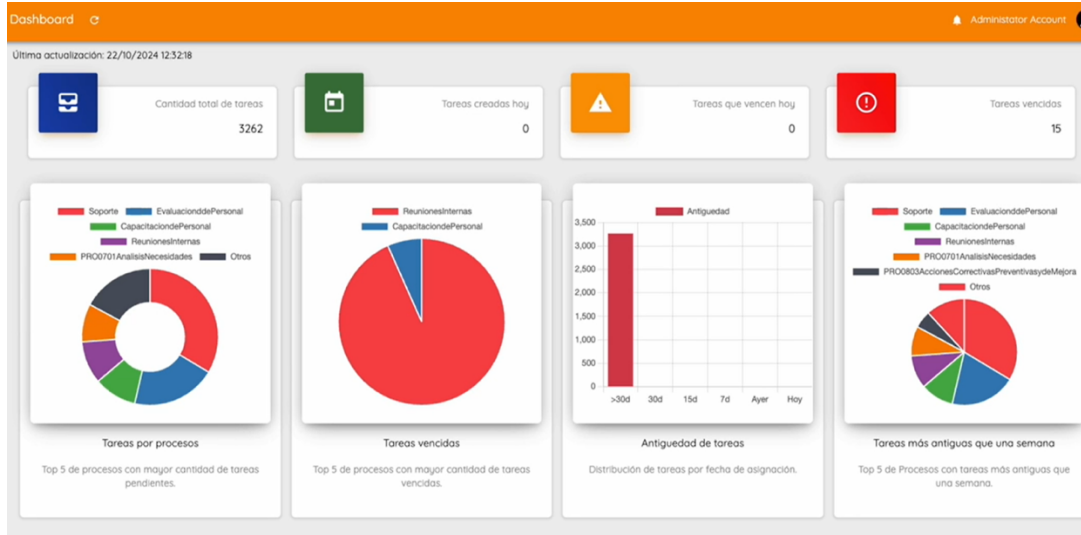
In addition, BIZUIT Dashboard is a powerful tool that maximizes our potential. Those of us who have administrative roles can configure and manage the platform, including things like security, roles, permissions, and the system's trace logs.



For process analysts, BIZUIT Dashboard offers integrated analytical tools that enable detailed process tracking.



Finally, end users have access to our custom statistics and reports, which help measure performance and manage their workload effectively.



The work portal in BIZUIT Dashboard not only gives us visibility and control over processes, but also facilitates decision-making at all levels of our organization. This is just the beginning of the journey to understand how BIZUIT can transform the way we work.

Summary

In short, BIZUIT Dashboard is a platform that allows us to optimize our daily management by offering organized access to key processes, analytical tools, and real-time monitoring. It is a comprehensive solution that boosts our productivity, encourages informed decision-making and provides us with the necessary tools to overcome any operational challenge.

We invite you to continue with us in Unit 2, where we will explore in detail the Pages and Modules in BIZUIT Dashboard.

Unit 2: Pages and Modules in BIZUIT Dashboard

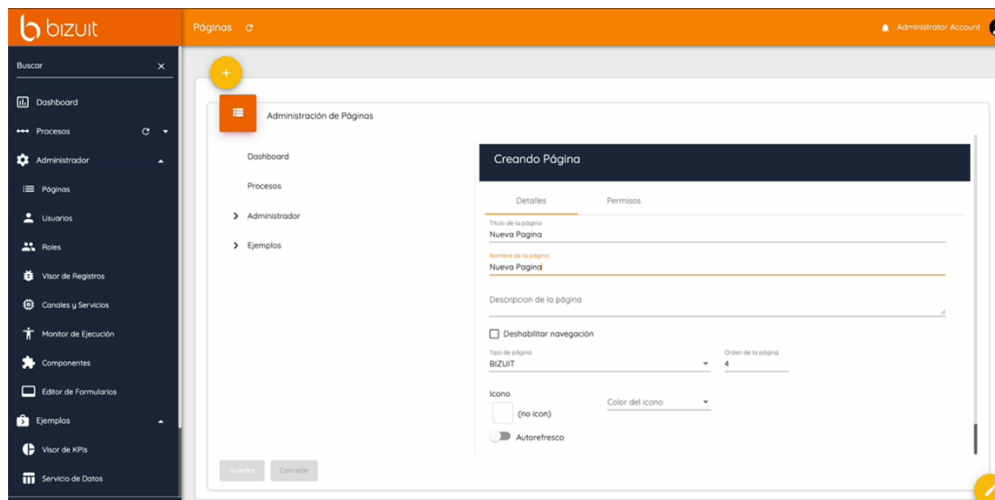
BIZUIT Dashboard is presented as an essential tool for the management of information and processes within modern work teams. It allows us to centralize and customize our daily operations, providing quick access to relevant data and key functionalities.

In this unit we will see how to navigate and configure pages and modules in BIZUIT Dashboard.

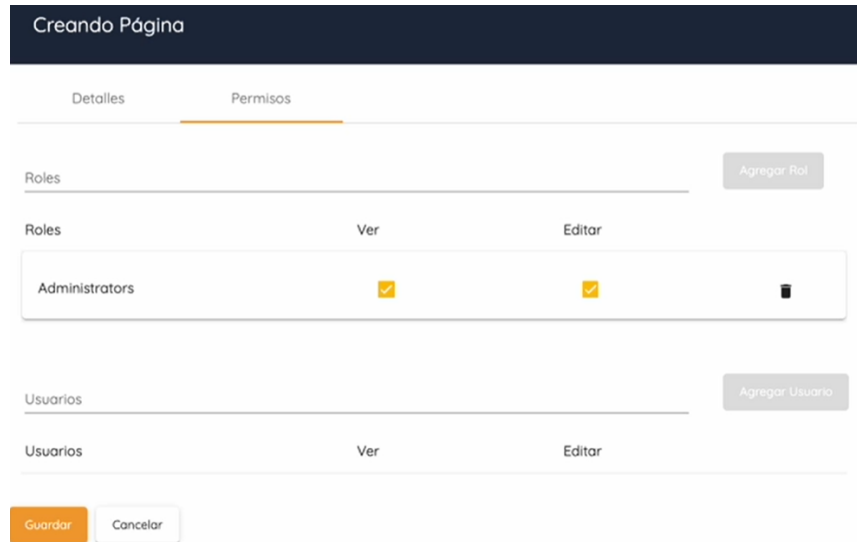
Customizing Pages and Modules in BIZUIT Dashboard

Each page, provided by BIZUIT Dashboard by default, is designed to give us quick access to relevant information, such as reports, queries, KPIs, process statistics, or daily task lists.

BIZUIT Dashboard offers us the possibility to create custom pages, adapting the interface according to our needs as a team.

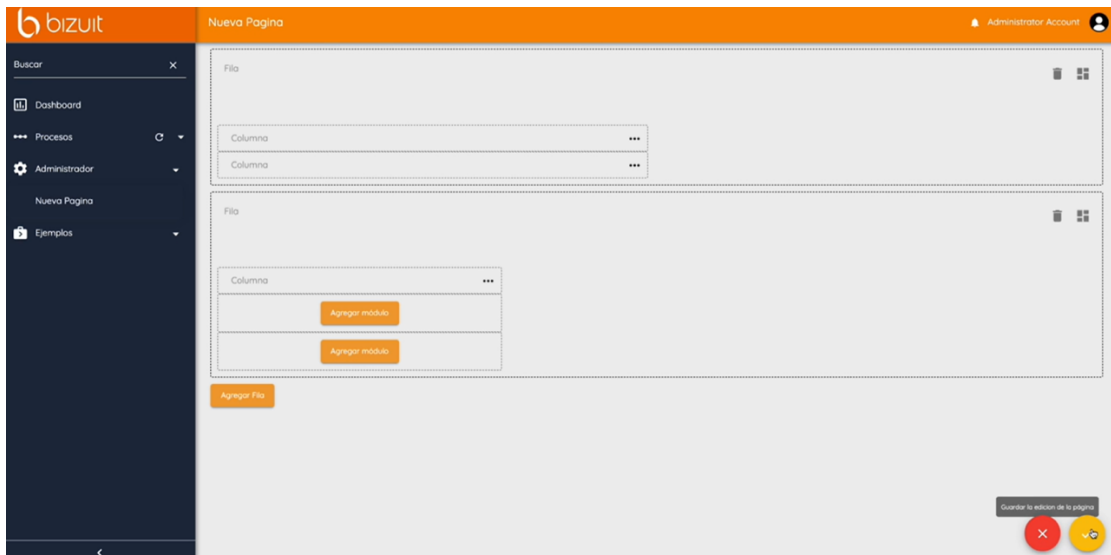


Each page can have a default set of roles and users with access for both viewing and editing.



In addition, each page allows us to define the structure of its content using rows and columns. Each cell within this structure is configurable through modules that provide us with the content and functionality we want.

BIZUIT Dashboard allows us to add different modules available on the platform, such as task lists, traces, graphs, reports or key performance indicators, as well as modules designed and developed by third parties using the extensibility mechanisms offered by BIZUIT. Each module includes specific configuration options that allow us to customize it according to our needs.



The customization of pages and modules is a key tool so that we can adapt each space of BIZUIT Dashboard to our preferences and workflow. This not only improves the productivity of



the team, but also increases the level of customization, allowing us to optimize every detail to fit our specific needs.

With these options, our team can optimize your workspace and maximize your efficiency intuitively and effectively. BIZUIT Dashboard offers us a universe of possibilities to transform our ideas into a functional and tailor-made environment.

Summary

BIZUIT Dashboard is an essential tool that allows us to centralize and personalize our daily operations, offering quick access to relevant information and key functionalities. This chapter has guided us through the main features that make this platform an essential ally in data and task management.

We've explored how to navigate and configure pages, structuring them with rows and columns, and customizing them using modules such as task lists, charts, or key performance indicators. The ability to adjust these tools according to our needs ensures an adapted experience that improves the productivity and efficiency of the team.

Now that we understand these basics, we invite you to continue with the next unit where we will focus on Users and Roles in BIZUIT Dashboard, to delve into the management of accesses and permissions that guarantee an efficient and secure use of this platform.

Unit 3: Users and Roles in BIZUIT Dashboard

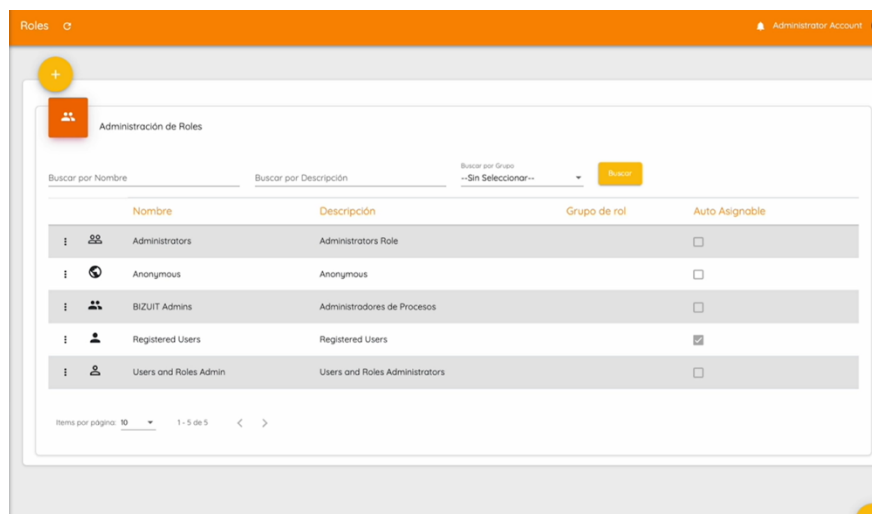
User and role management is a fundamental pillar for any organization that uses BIZUIT Dashboard. In this unit, we will focus on how to effectively manage access and permissions within the platform, ensuring a secure work environment aligned with the needs of the team. The right configuration of roles allows us to determine what information and functionalities are accessible to each employee, ensuring an efficient and well-organized workflow.

From creating custom roles to assigning specific permissions, we'll explore the tools available to tailor the platform to our organization's requirements. This knowledge will not only allow us to optimize the use of BIZUIT Dashboard, but also lay the foundation for a more orderly and productive administration.

Managing Users and Roles in BIZUIT Dashboard

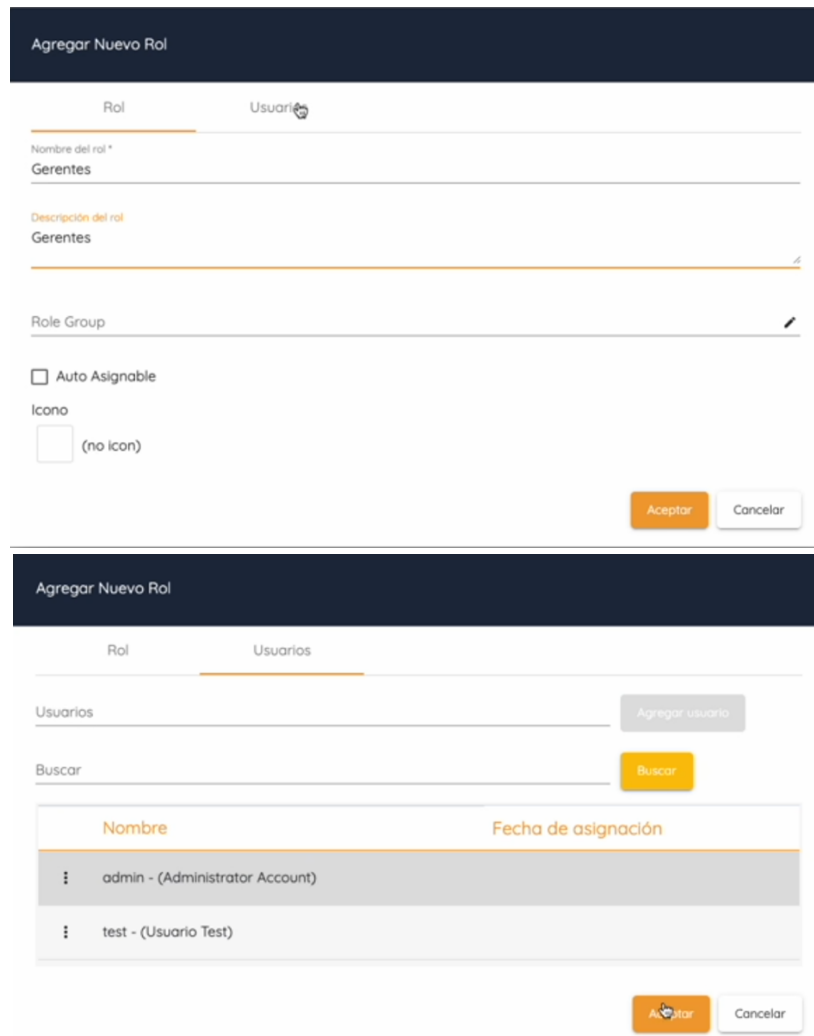
From the admin panel, admins have the ability to add users, assign specific roles, or make modifications when needed. This allows us to dynamically adapt permissions based on the changing needs of our team.

Roles in BIZUIT Dashboard determine which tasks, modules, and data will be available to each employee. In this way, we guarantee that each user has access only to the information and functionalities they need to perform their work efficiently. Although the system includes some predetermined roles, we have the possibility of creating as many roles as necessary to reflect the particularities of our organization.



Once we have created a role, we assign the corresponding users. This process can also be done from the opposite perspective: by entering a user's profile, we can assign them one or

more suitable roles. This flexibility allows us to easily manage the responsibilities and access of each team member.



The image displays two screenshots of the 'Agregar Nuevo Rol' (Add New Role) form in the BIZUIT dashboard.

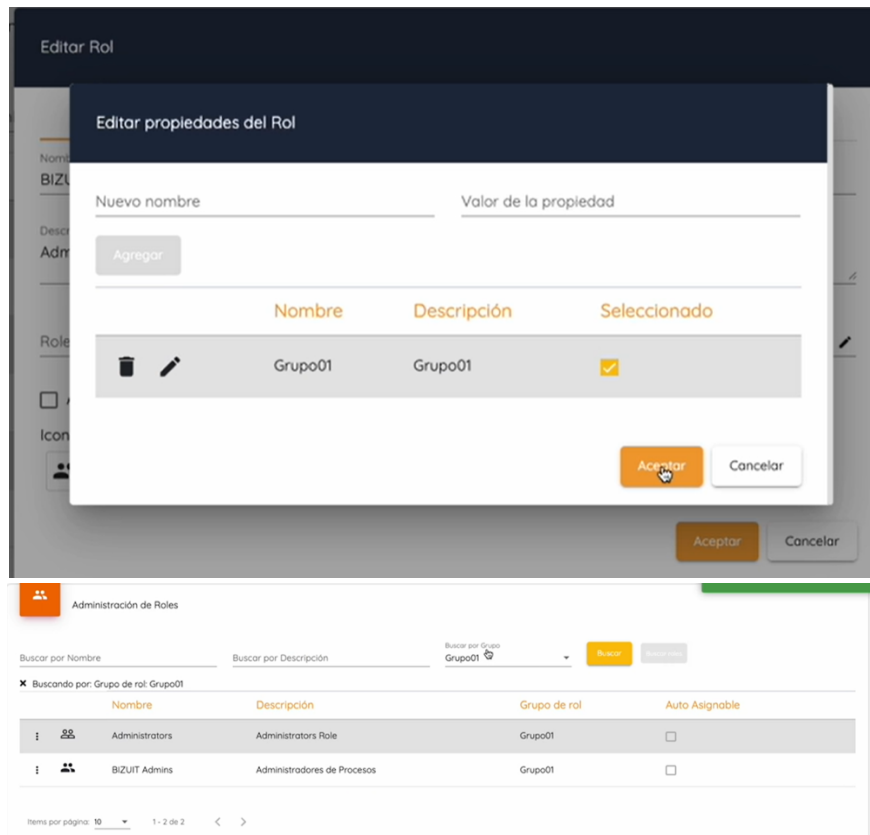
The top screenshot shows the 'Rol' tab. The form includes the following fields and options:

- Nombre del rol ***: Gerentes
- Descripción del rol**: Gerentes
- Role Group**: (empty)
- Auto Asignable**
- Icono**: (no icon)

The bottom screenshot shows the 'Usuarios' tab. It includes a search bar and a table of users:

Nombre	Fecha de asignación
admin - (Administrator Account)	
test - (Usuario Test)	

Another important functionality is the creation of role groups. These groups help us better organize permissions, grouping similar or related roles to make them easier to find and assign. By assigning role groups to users or other roles, we optimize setup time and ensure tidier administration.



Good role and user management not only affects the permissions of modules and pages within BIZUIT Dashboard, but also access to tasks and processes specific to our organization. This hierarchical organization of permissions ensures that workflow remains efficient and sensitive information is protected.

Summary

In this unit, we learned how to manage users and roles in BIZUIT Dashboard, from creating custom roles to assigning permissions and groupings. This management is essential to maintain a safe work environment, organized and adapted to the specific needs of the team. We invite you to continue your learning in the next unit where we will see the configuration of BIZUIT Dashboard.

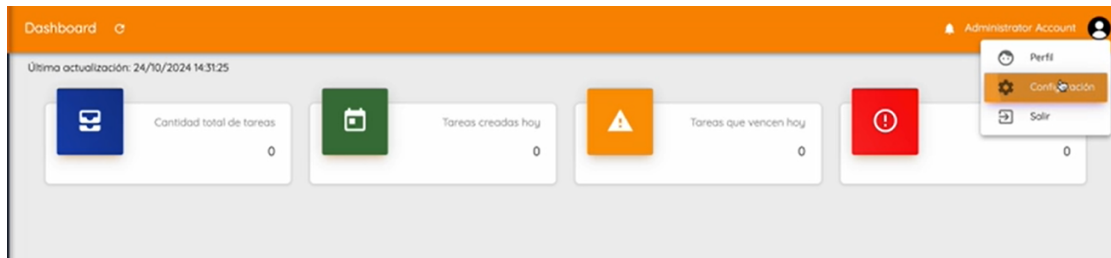


Unit 4: Configuring BIZUIT Dashboard

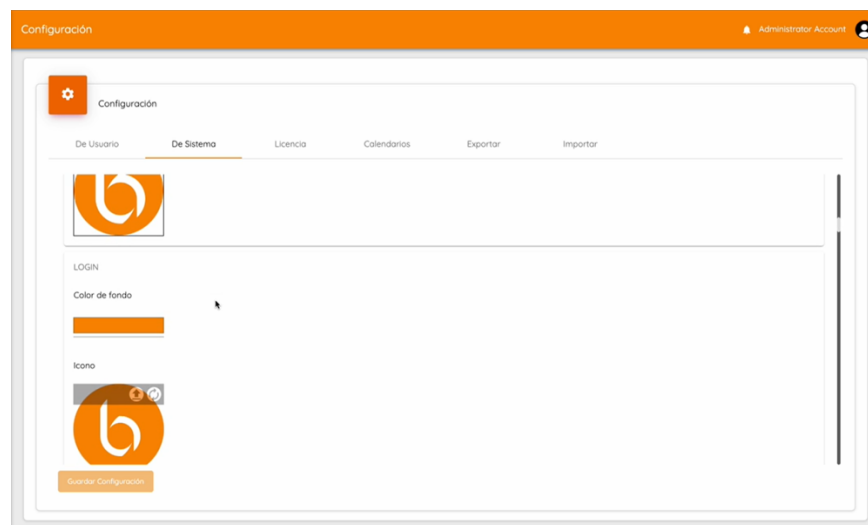
Welcome to this unit dedicated to the configuration of BIZUIT Dashboard. In this space, we'll learn together how to customize the dashboard to align it with the specific needs of our organization.

The importance of a well-configured dashboard lies in its ability to centralize relevant information and facilitate daily work. With proper customization, we can ensure that all users have an intuitive and efficient environment, designed to boost their productivity and keep them focused on what really matters. In this chapter, we'll explore the options available and learn how to get the most out of this powerful tool.

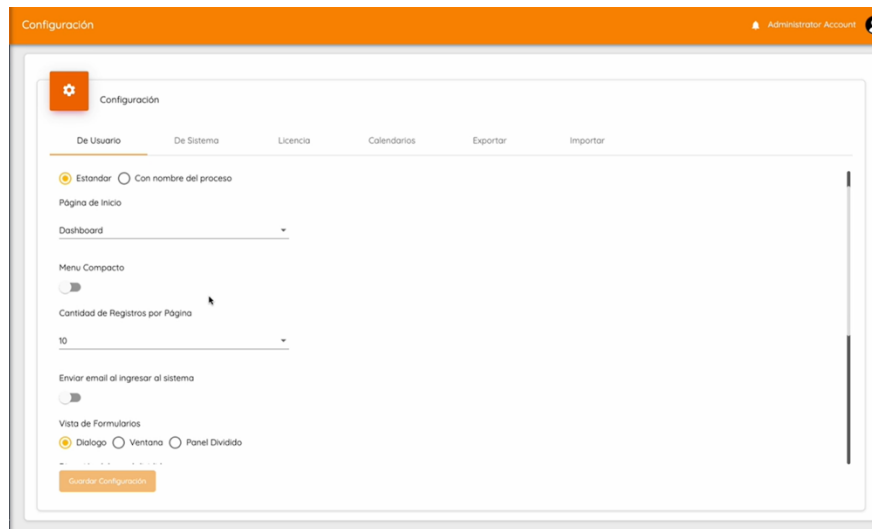
To get started, we'll head over to our profile and select the settings option.



This initial step will open up a world of possibilities for us to adapt the dashboard to our corporate identity. Within this section, we will be able to modify colors, themes and the layout of the modules, allowing the visual environment to reflect the essence and values of our company.



Once inside, we will discover a wide variety of options that we can adjust according to our needs. In addition, in the user section, we will find additional customization options. Here we can define how we want to display the menu, adapting it to individual or team preferences. We will also be able to configure custom views and filters that will allow each user to focus on the most relevant data for their daily work.



These tools not only offer us a more efficient experience, but also a platform that flexibly adapts to the needs of each team within our organization. With BIZUIT, we can achieve a unique combination of customization and efficiency, ensuring that every member of our team has access to the information that really matters.

Summary

In this unit we address how to configure the BIZUIT dashboard to suit the specific needs of an organization. We visualize the options to customize colors, themes, module layout and notifications, as well as advanced tools such as custom views and filters. These functionalities allow us to centralize relevant information, improve efficiency and ensure that each user has access to the essential data for their daily work, offering an intuitive experience aligned with the corporate identity.

Chapter Summary

In this chapter, we explore BIZUIT Dashboard, a powerful tool that simplifies the way we manage our daily activities. Designed to fit the specific needs of each organization, this work portal gives us centralized access to key business applications, advanced analytics tools, and



intuitive configuration that drives efficiency and productivity. With BIZUIT Dashboard, we not only organize our tasks, but also gain a clear overview of processes in real-time, allowing us to anticipate challenges and make informed decisions.

Throughout this unit, we discover how this platform becomes an indispensable ally for administrators, analysts and end users, providing an experience adapted to their specific roles. From customizing views and menus to detailed monitoring, BIZUIT Dashboard is designed to transform the way we work and improve our responsiveness to day-to-day challenges.

We invite you to continue expanding your knowledge in the next chapter, where we will explore basic process automation with BIZUIT.