



Vizual Pro - User Guide



Handy tips and Instructions for Users



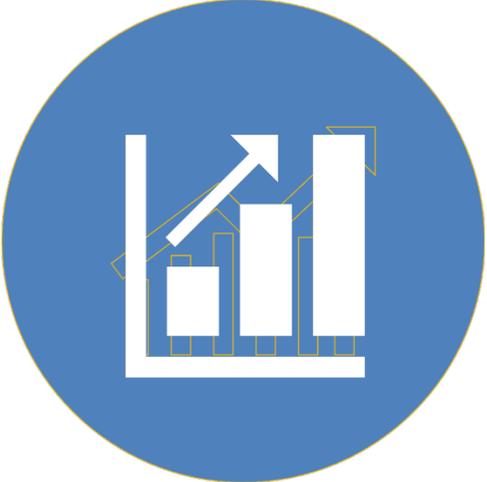
Definition



OBJECTIVES

Goals that inspire and set direction

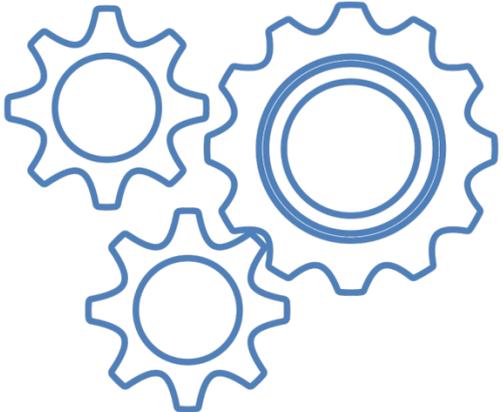
- *Where do I need to go?*
- *Think of it as a point on a map, a destination like Boston*



KEY RESULTS

Steps that measure progress towards an objective

- *How do I know I'm getting there?*
- *Think of it as a signpost with a distance marker.*



TASKS/ INITIATIVES

Tasks required to drive progress of key results

- *What will I do to get there?*
- *Think of it as a description of what you'll do to get to your destination.*





Handy tips and Instructions for Users

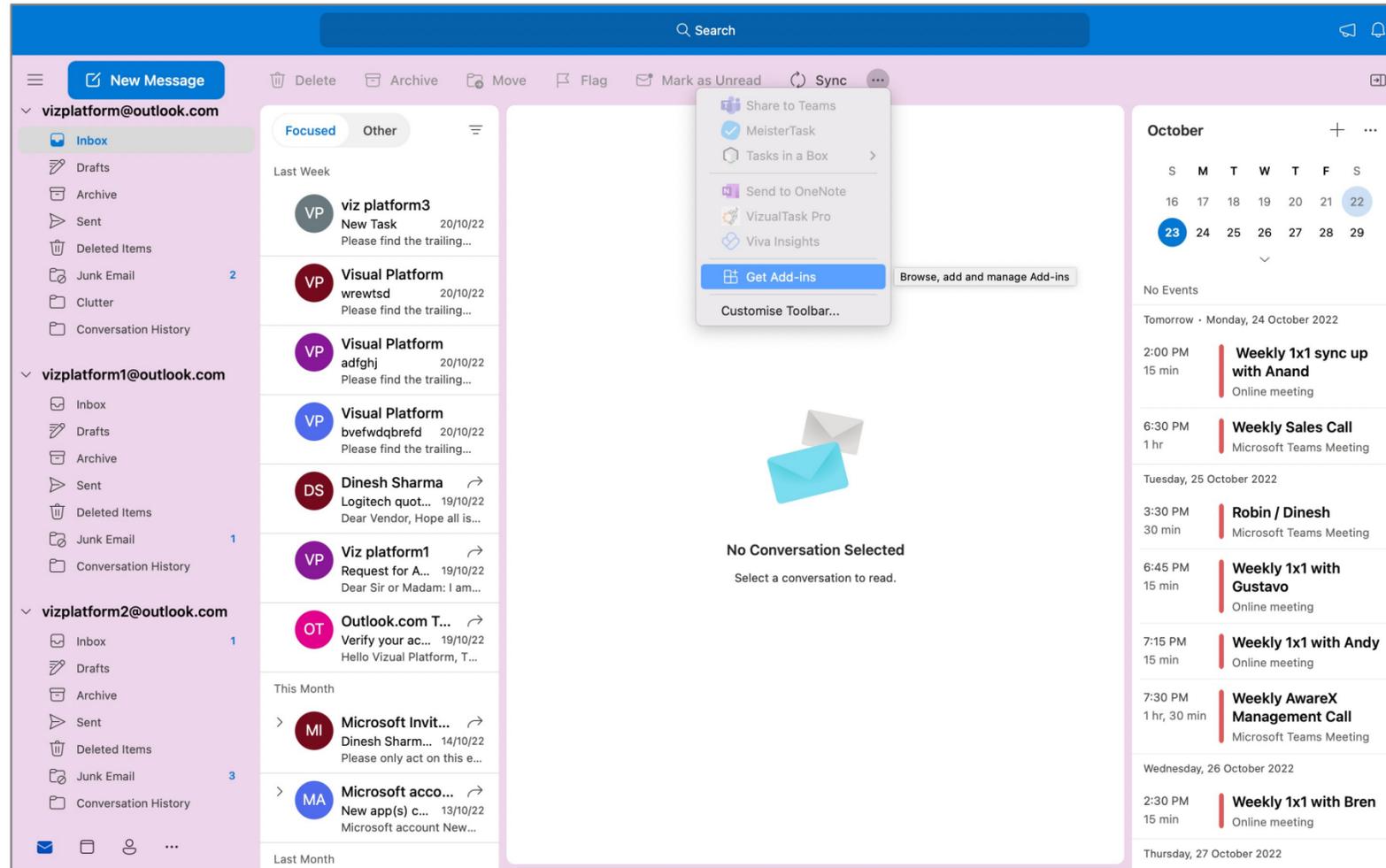


1 How to 'Install' Vizual Pro

1.1. Goto Microsoft **Outlook** using a client App or Browser or Mobile App

1.2 Click on 'The ellipsis' at the top right-hand side

1.3 Click on **Get Add-ins**

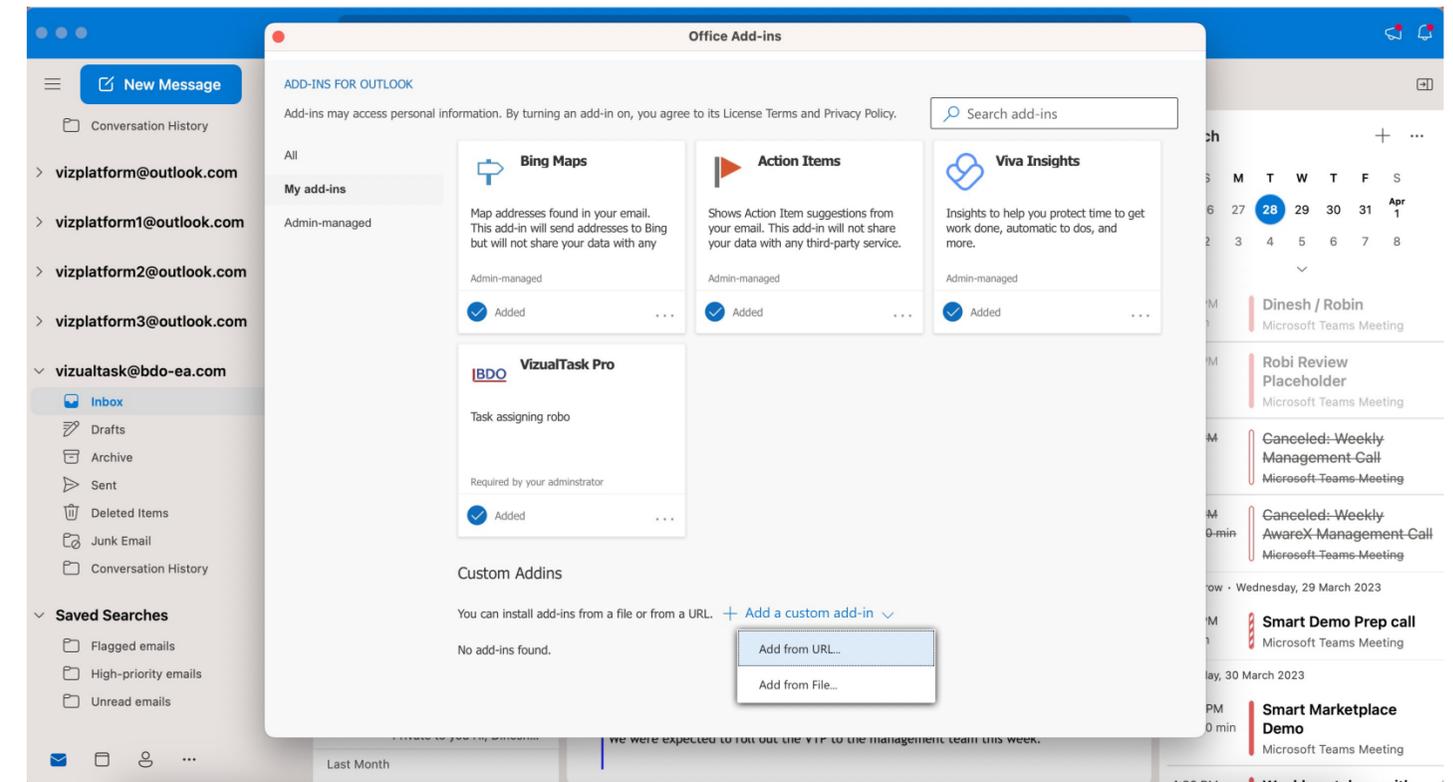


1.4. Click on ' My Add-Ins'

1.5 Click on 'Custom Add-ins'

1.6 Click on '+ Add a custom add-in'

1.7 Click on 'Add from URL'



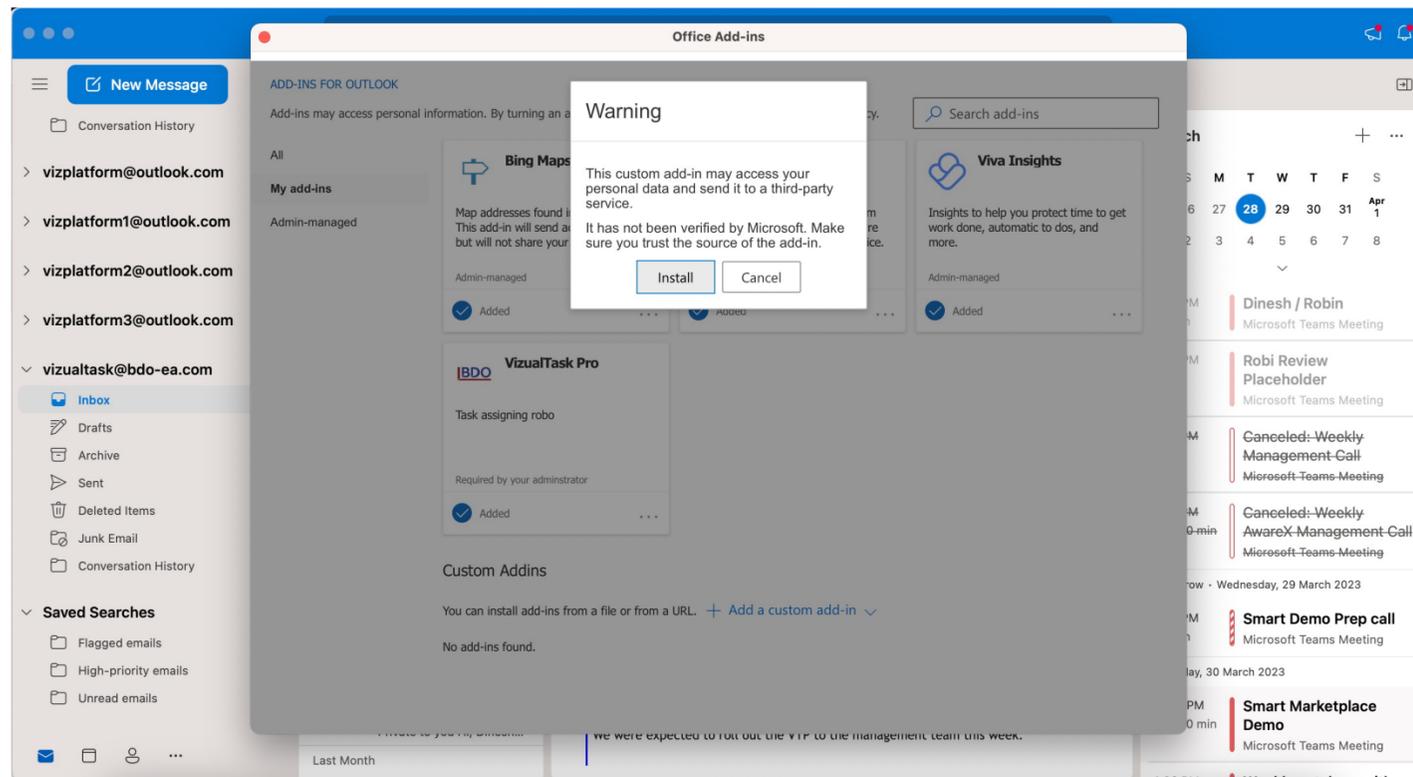
1 How to 'Install' Vizual Pro

1.8 Enter the URL

<https://vizualpro.app/asrfnx80lkae8ks9kdl01yemde/manifest-swaca7s.xml>

1.9 Click on 'Install'

1.10 Once the installation is successful, close the window



2 How to create a 'New Task which is linked to any emails' in Vizual Pro

2.1 Access 'Vizual Pro' Add-In

2.2 Go to 'Inbox' and click on 'One of the emails'

2.3 Click on The ellipsis' at the top right-hand side and select 'Vizual Pro'

The screenshot shows the Outlook interface with an email selected. The 'Vizual Pro' add-in menu is open, and the 'VizualTask Pro' option is highlighted. The email content is visible in the background.

2.4 Click on 'New Task'

2.5. Select 'Email Task'

2.5 Enter all the inputs and click on 'Save Task'

The screenshot shows the 'New Task' dialog box in Outlook. The 'Email Task' option is selected, and the task details are being entered. The 'Save Task' button is visible at the bottom.

3 What happens when a 'Task' linked to Email gets created in Vizual Pro

3.1 See the confirmation message 'Task created successfully.'

3.2 The system also forwards the specific email on which the task is created to

- Task assignee
- People (emails copied) in CC field

3.3 Task details are populated into database

3.4 Email trails are populated into database

The screenshot displays an Outlook inbox with a selected email titled "Service proposal request" from "Viz platform1 <vizplatform1@outlook.com>" to "vizplatform2@outlook.com" on Wednesday, 19 October 2022 at 4:26 PM. The email body contains a request for a proposal from HVID International, detailing services like annual audits, tax filings, and quarterly reviews. On the right, the "Vizual Task" sidebar is open, showing a list of tasks such as "sub task 1", "Proposal Request", "New Task Created", and "Vendor Requirement". A green notification bar at the bottom of the sidebar indicates "Create Task Created task successfully".

4 How to create a 'New Task which is internal and not linked to any emails' in Vizual Pro

2.1 Access 'Vizual Pro' Add-In

2.2 Go to 'Inbox' and click on 'One of the emails'

2.3 Click on The ellipsis' at the top right-hand side and select 'Vizual Pro'

The screenshot shows the Outlook interface with an email selected. The 'Vizual Pro' add-in menu is open, showing options like 'Share to Teams', 'MeisterTask', 'Tasks in a Box', 'Send to OneNote', 'VizualTask Pro', 'Viva Insights', and 'Get Add-ins'. The 'VizualTask Pro' option is highlighted.

2.4 Click on 'New Task'

2.5. Select 'Internal Task'

2.5 Enter all the inputs and click on 'Save Task'

The screenshot shows the Outlook interface with the 'New Task' dialog box open. The 'Internal Task' option is selected. The dialog box contains fields for 'Subject', 'Requestor Email', 'Requestor Name', 'Request Date', 'Task Title', 'Category', 'Status', 'Value (\$)', 'Priority', 'Completion Date', and 'Completion Time'. The 'Save Task' button is visible at the bottom right.

5 What happens when a 'Task' not linked to Email gets created in Vizual Pro

3.1 See the confirmation message 'Task created successfully.'

3.2 The system also generates an email content based on the task title, task comments and forwards that generated email to

- Task assignee
- People (emails copied) in CC field

3.3 Task details are populated into database

3.4 Email trails are populated into database

The screenshot displays an Outlook email client interface. The main pane shows an email titled "Service proposal request" from "Viz platform1 <vizplatform1@outloo...>" to "vizplatform2@outlook.com" on Wednesday, 19 October 2022 at 4:26 PM. The email content includes a greeting, a request for proposals from HVID International, and a list of services to be performed: 1. Annual audit, 2. Tax filings, and 3. Quarterly reviews of financial statements. The email is signed by Kevin.

On the right side of the interface, the "Vizual Tas..." panel is visible, showing a task list. The tasks listed are:

- sub task 1**: Assignee: Ganesh, Completion Date: Fri 28 Oct 2022 5:30
- Proposal Request**: Assignee: viz platform2, Completion Date: Wed 26 Oct 2022 5:30
- New Task Created**: Assignee: Dinesh Sharma, Completion Date: Mon 24 Oct 2022 5:30
- Vendor Requirement**: Assignee: viztestplatform1, Completion Date: Sun 23 Oct 2022 5:30

At the bottom of the task list, there is a green confirmation message: "Create Task Created task successfully".

6 How to update the Task status in 'Vizual Pro' and Login to 'Vizual Pro' server console

4.1 Task details are visible at **outlook Add-In** both for

- **Assigner**
- **Assignee**

4.2 Status update

- Task status can be updated from the **outlook Add-In**
- Once the task is assigned, the task status is **'Open'**
- The other status can be **Review, In progress, Reject, Done, Approved**

4.3 Go to **'Vizual Pro server console'** by clicking on any of the **Task** title from the **Outlook Add-In**.

4.4 Email exchange on that topic gets recorded in the system and it can be viewed from the **Vizual Pro server console**

4.5 Login to 'Vizual Pro' server console with your **Outlook credentials**. Click on **'Single Sign On'**

The screenshot shows the Outlook interface. On the left, there's a navigation pane with folders for 'vizplatform1@outlook.com', 'vizplatform2@outlook.com', and 'vizplatform3@outlook.com'. The main area displays an email titled 'FW: Proposal Request for CPA Services' from 'Viz platform1 <vizplatform1@outlook.com>'. The email content includes a request for a trailing mail and details about a proposal for CPA services. Below the email, a task list is visible, showing tasks like 'CPA Service Request' (Open), 'Vizual Platform Job' (Approved), 'New Opportunity - Dinesh' (Reject), and 'Project Two' (Approved). The 'CPA Service Request' task is highlighted with a red box, and its status is 'Open'.

The screenshot shows the 'Vizual Pro' server console task details page. The task is titled 'CPA Service Request' and is assigned to 'Viz platform1'. The status is 'In Progress', which is highlighted with a red box. Other details include 'Requestor Email: vizplatform@outlook.com', 'Requestor Name: Vizual Platform', and 'Request Date: 2022-10-'. The page also shows a list of other tasks like 'Vizual Platform Job', 'New Opportunity - Dinesh', and 'Project Two'.

The screenshot shows the 'Sign In to Vizual Pro' page. It includes a 'New Here? Create an Account' link and a prompt to 'Enter Username and password to continue'. There are input fields for 'Email' and 'Password', with a 'Forgot Password?' link. A blue 'Continue' button is present. Below the password field, there is a 'Single Sign On' button, which is highlighted with a red box. At the bottom, there is a Microsoft login section with a 'Sign in' button.

7 How to update Task with Email Trails

5.1 Email interactions or email exchanges between assignor and assignee can be updated in database by clicking on **'Update Task'**

5.2 Click on **Edit Task Icon** as highlighted with Red color border and click on **'Update Task'**

The screenshot displays the Vizual Platform interface. On the left, a sidebar shows a list of tasks, including 'Request for Financial Audit' and 'Important Task'. The 'Request for Financial Audit' task is highlighted with a red border. In the center, an email trail is shown, including a 'Request for a Service Quote' and a 'Request for Financial Audit'. On the right, a 'Task Flow View' panel shows the task details, including the assignee 'Vizual Test User' and the completion date 'Wed 2 Nov 2022 23:30'. A green 'Update' button is visible at the bottom of the task flow view, with a message 'Updated task successfully' below it.

5.3 All the email interactions/exchanges are recorded in the Database

5.4 The interactions can be viewed anytime by going through the Task report

The screenshot shows the BDO East Africa dashboard. The main content area displays a 'Task Flow View - Proposal Request' for a 'Proposal Request' task. The task is currently in 'In Progress' status, assigned to 'dinesh.sharma@bdo-ea.com', with a priority of 'Medium'. The task description includes a request for audit services. The 'Comments' section shows two entries: 'important task, do right away' and 'under analysis'. A blue 'Update' button is located at the bottom right of the task details. The dashboard sidebar on the left includes options like 'Dashboard', 'OKRs', 'Tasks', 'Reports', and 'Vision-Strategy'. The footer indicates '2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.'

6 How to mark Task as Done and Approved?

6.1 Task details are visible at outlook Add-In both for

- **Assigner**
- **Assignee**

6.2 Mark status as DONE

- Task assignee, once task is completed mark as DONE. However, Task assignee cannot mark a task as APPROVED.

The screenshot shows the Outlook interface with a task assigned to 'viz platform2'. The task details are visible in the right-hand pane, including the subject 'Proposal Request for CPA Services', the assigner 'Raj Anand', and the assignee 'viz platform2'. The task status is currently 'In Progress'. A dropdown menu is open over the task, showing options: 'Done', 'Waiting on Customer', and 'Waiting on Third Party'. The 'Done' option is highlighted.

6.3 Only the Task assignor can mark the status as APPROVED

6.4 As a Task Assignor, he can go to the 'Created by Me' section of Add-In and update the task status as 'APPROVED'

6.5 Click on 'Update Task'.

The screenshot shows the Outlook interface with the same task as in the previous screenshot. The task status is now 'Approved'. The 'Update Task' button is visible at the bottom right of the task pane.

7 Giving Rating and Feedback on the Task and update Task External Status?

7.1 The Task Assignor, can mark the task as APPROVED.

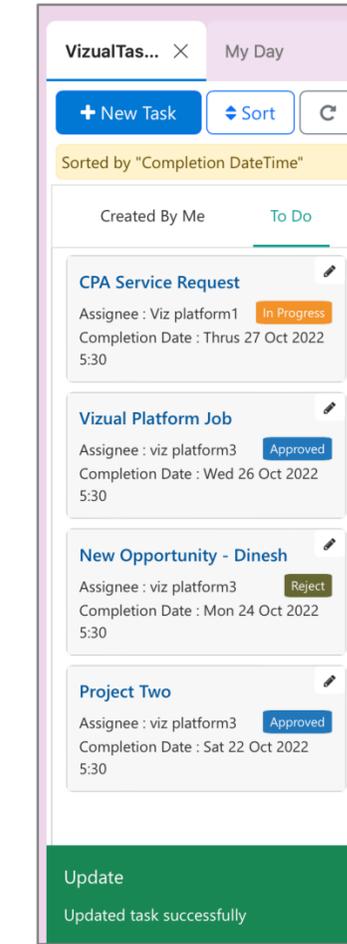
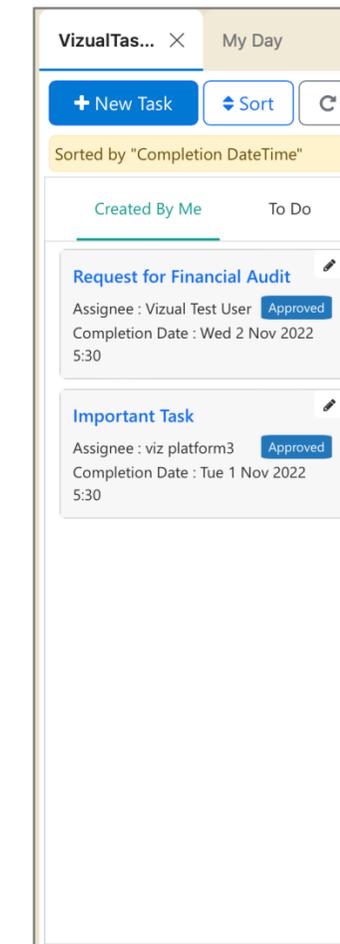
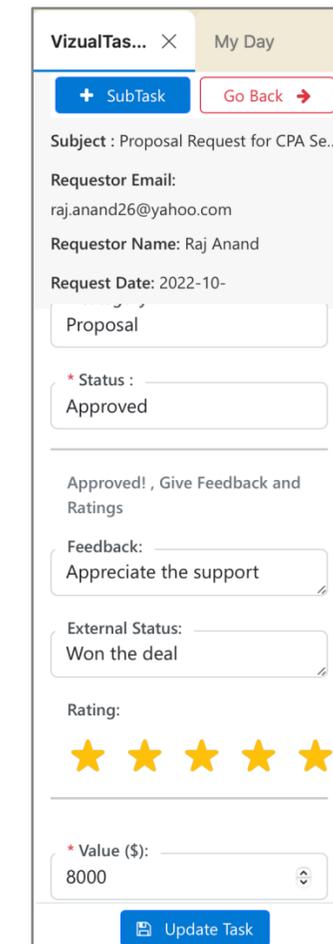
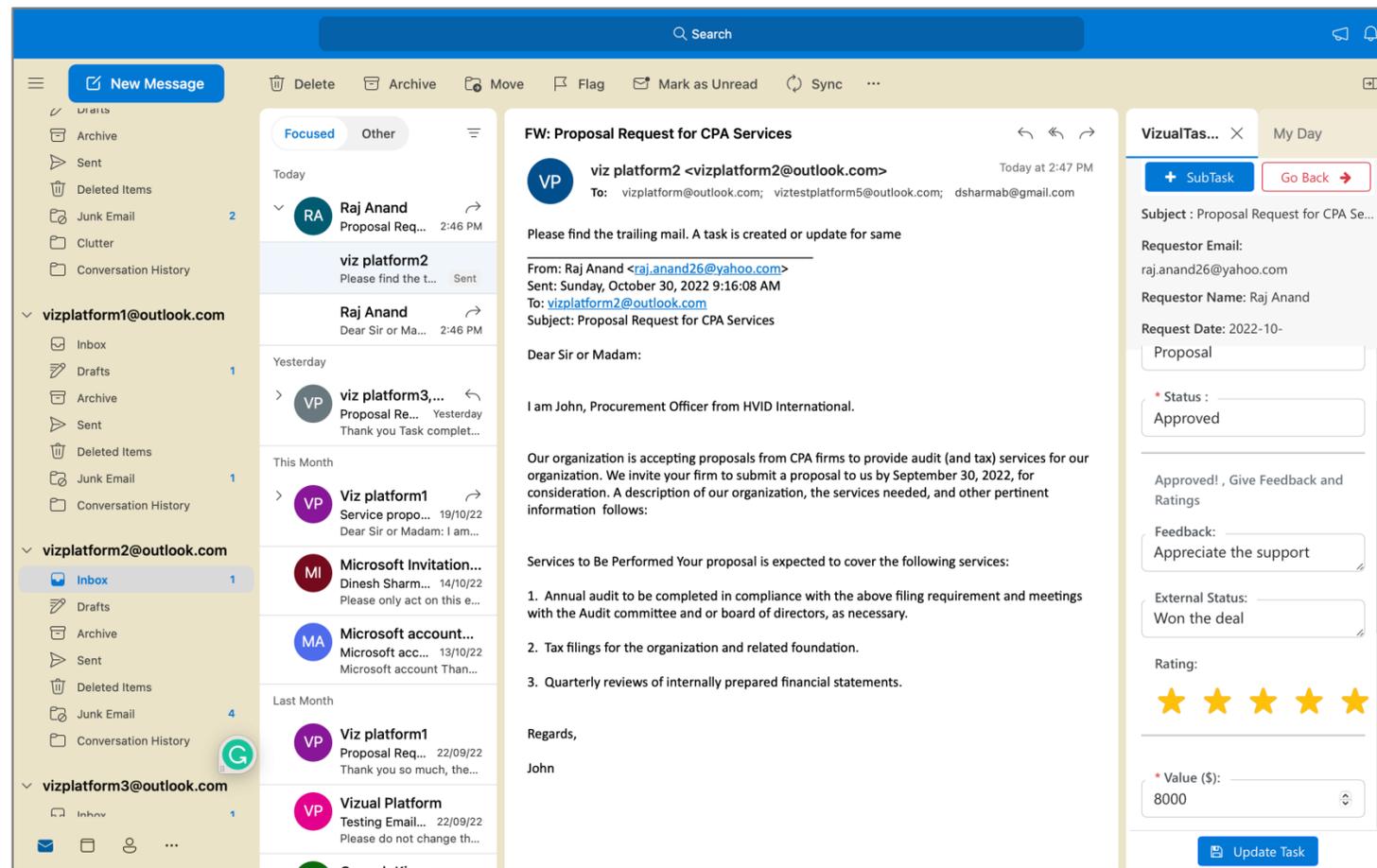
7.2 The task can be marked as APPROVED provided the task status as DONE

7.3 The Assignor can also reopen the task

7.3 Only the Task assignor can mark the status as APPROVED

6.4 As a Task Assignor, he can go to the 'Created by Me' section of Add-In and update the task status as 'APPROVED'

6.5 Click on 'Update Task'.

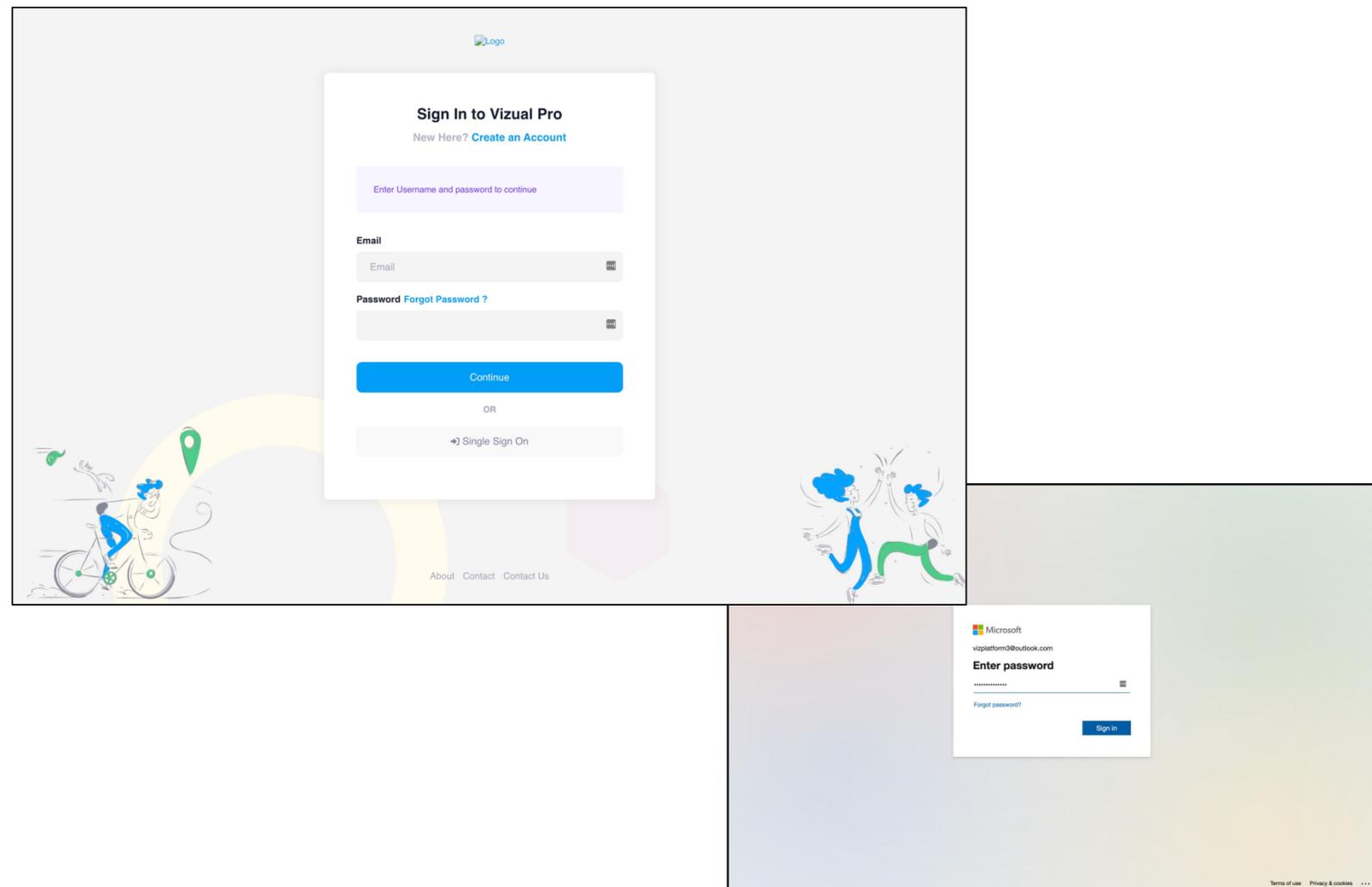


8 Dashboard – Executive and Individual Level

8.1 Login to the 'Vizual Pro' console by clicking on any of the titles of 'Vizual Pro Outlook Add-in'

8.2 You will get a **Sign-In option**

- Enter **Microsoft Login** credentials

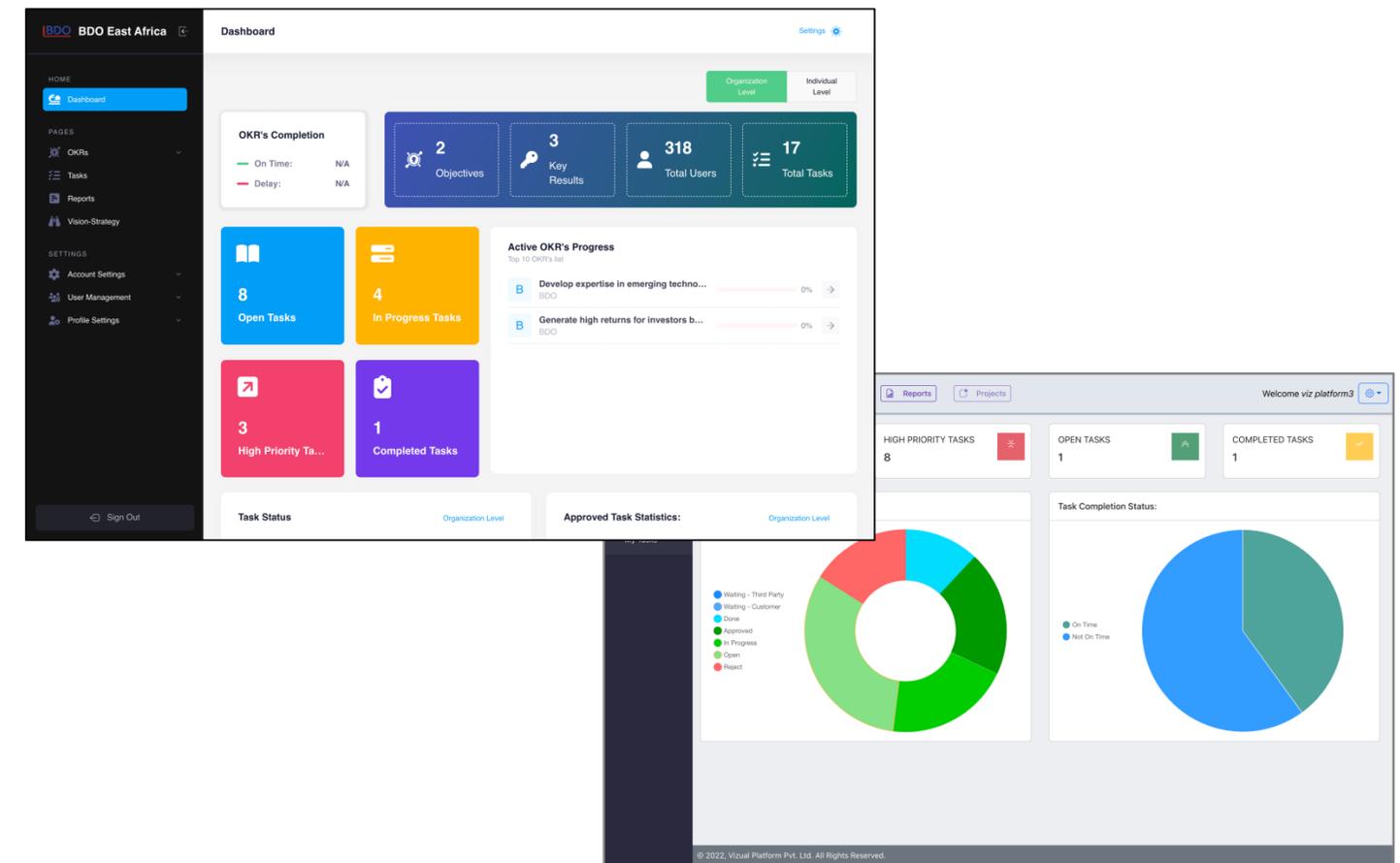


8.3 By default the user will be navigated to '**Dashboard**' and **Organization Level**

8.4 The Organization level dashboard provides various details like

- Task Status, Task completion status, Number of Tasks in various statuses like In progress, high priority, open, completed etc.

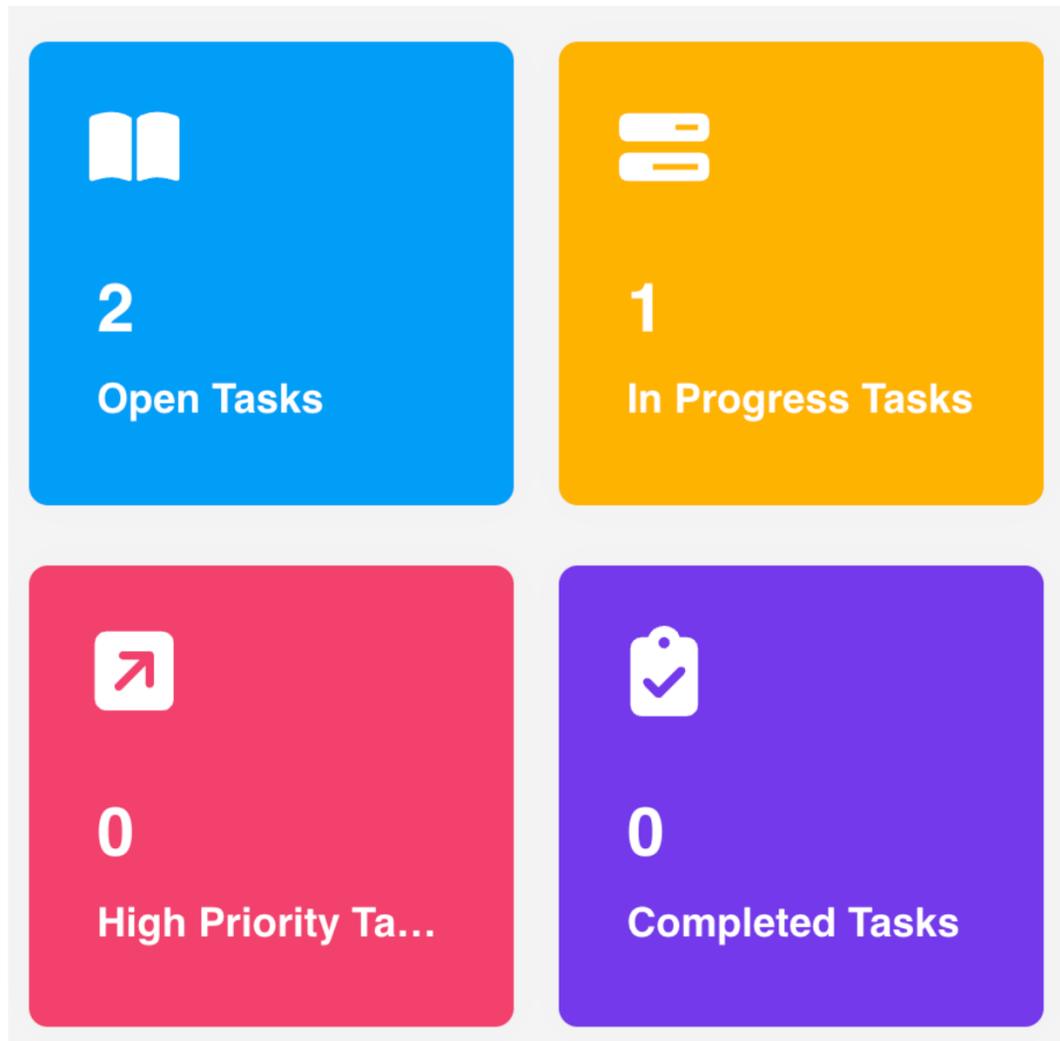
8.5 Only users with Executive role privileges can see this report



9 Dashboard – My Tasks – Individual level Task reports

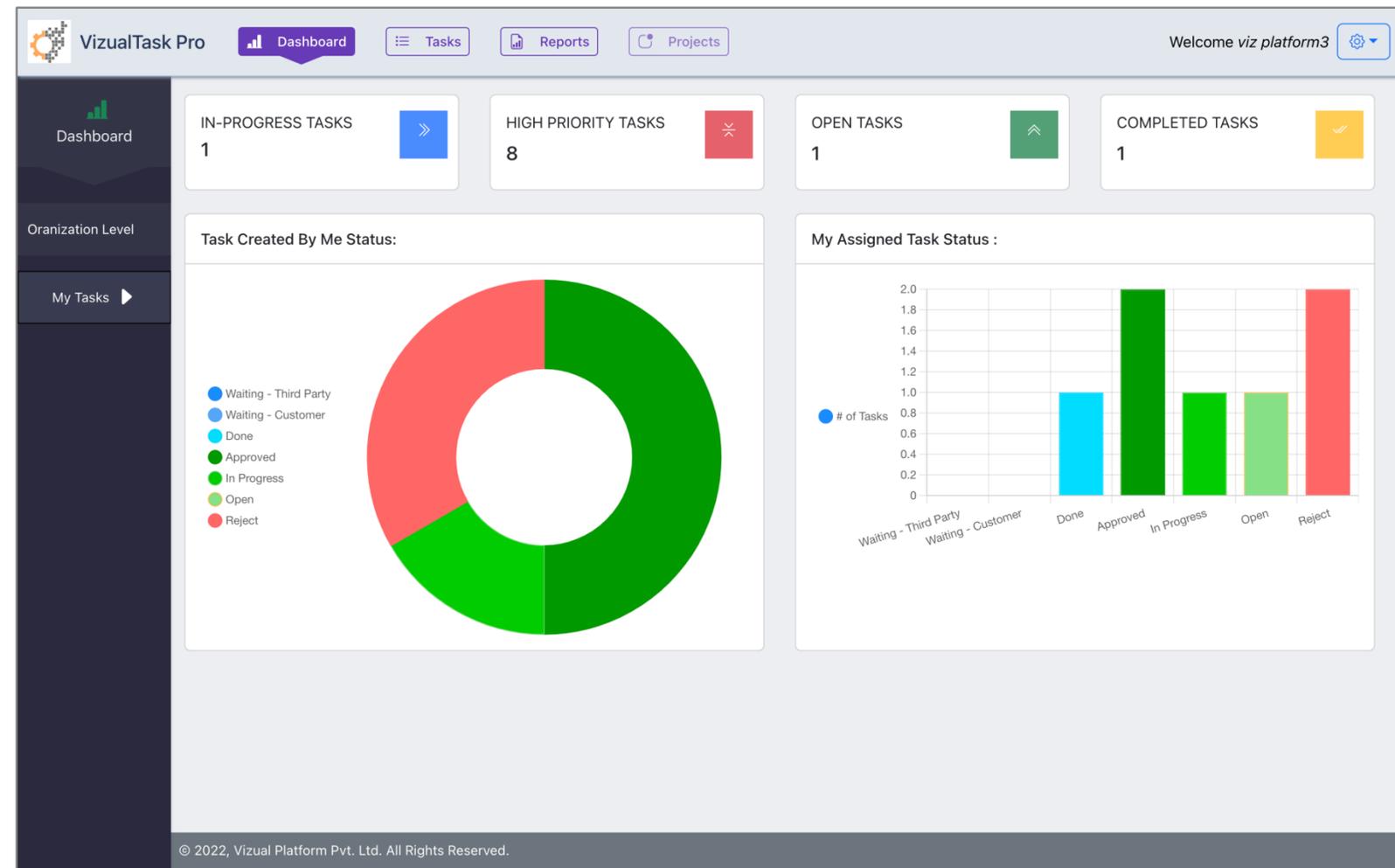
9.1 Login to the 'Vizual Pro' console

This view of the dashboard is accessible to all the individuals in the organization



9.2 Go to 'My Tasks' under Dashboard

This view provides a view of my (the person who logged in to console) task performance



10 Task Details – To Do

10.1 Login to the 'Vizual Pro' console

10.2 Click on Tasks

10.3 The user can click on 'To Do' to see all tasks that are assigned to him (the person who logs into the console with his/ her credentials). It shows all the task details Due date, status, priority etc.

Task List
Task > Task List

To Do Create By Me

Search: + Add Task

ID	TITLE	PRI...	CREATED	DUE DATE	ASSIGN...	ASSIGN...	STA...
TaskID-3	Proposal Request	Medium	22 Mar 2023 05:10:28 pm	01 Jan 1970 05:30:00 am	dinesh.sharma@...	dinesh.sharma@...	IN PROGRESS
TaskID-9	Testing	Low	24 Mar 2023 02:49:54 pm	01 Jan 1970 05:30:00 am	dinesh.sharma@...	dinesh.sharma@...	REJECT
TaskID-10	aa	Medium	28 Mar 2023 10:24:44 am	31 Mar 2023 11:30:00 pm	dinesh.sharma@...	vizplatform1@ou...	OPEN
TaskID-12	Implement	Medium	28 Mar 2023 11:02:19 pm	31 Mar 2023 11:30:00 pm	dinesh.sharma@...	dinesh.sharma@...	REJECT
TaskID-15	Develop a project	Medium	29 Mar 2023 01:33:38 pm	01 Apr 2023 11:30:00 pm	dinesh.sharma@...	dinesh.sharma@...	REJECT

Rows per page: 20 1-6 of 6

2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.

10.4 Click on 'Task Hyperlink' to view complete details

Task Flow View - Proposal Request
Reporter : dinesh.sharma@bdo-ea.com Completion Date Time : 2023-03-25 18:00

Dear Sir or Madam:
I am John, Procurement Officer from HVID International.

Our organization is accepting proposals from CPA firms to provide audit (and tax) services for our organization. We invite your firm to submit a proposal to us by September 30, 2022, for consideration. A description of our organization, the services needed, and other pertinent information follows:

Services to Be Performed Your proposal is expected to cover the following services:
1. Annual audit to be completed in compliance with the above filing requirement and meetings with the Audit committee and or board of directors, as necessary.
2. Tax filings for the organization and related foundation.
3. Quarterly reviews of internally prepared financial statements.

Regards,
John

Comments [Logs](#) [Sub Tasks](#)

Wed Mar 22 2023 17:10:28 GMT+0530 (India Standard Time) : important task, do right away

Wed Mar 22 2023 17:10:53 GMT+0530 (India Standard Time) : under analysis

Status: In Progress
Assignee: dinesh.sharma@bdo-ea.com
Priority: Medium
Comments:
Update

Sign Out

11 Task Details – Created by Me

11.1 Login to the 'Vizual Pro' console

11.2 The user can click on '**Created by Me**' to see all tasks that are created by Me/ Assignor of the Task (the person who logs into the console with his/ her credentials). It shows all the task details Due date, status, priority etc.

Task List
Task > Task List

To Do **Create By Me**

Search

ID	TITLE	PRI...	CREATED	DUE DATE	ASSIGN...	ASSIGN...	STA...
TaskID-1	Implement client ...	Medium	20 Mar 2023 07:27:52 pm	01 Jan 1970 05:30:00 am	priscillah.githang...	dinesh.sharma@...	IN PROGRESS
TaskID-2	Task Reminder ...	Medium	22 Mar 2023 05:00:02 pm	01 Jan 1970 05:30:00 am	priscillah.githang...	dinesh.sharma@...	IN PROGRESS
TaskID-3	Proposal Request	Medium	22 Mar 2023 05:10:28 pm	01 Jan 1970 05:30:00 am	dinesh.sharma@...	dinesh.sharma@...	IN PROGRESS
TaskID-4	Task request	Medium	22 Mar 2023 05:16:28 pm	25 Mar 2023 11:30:00 pm	priscillah.githang...	dinesh.sharma@...	APPROVED
TaskID-5	Lead generation	High	22 Mar 2023 05:30:17 pm	01 Jan 1970 05:30:00 am	priscillah.githang...	dinesh.sharma@...	OPEN

Rows per page: 20 1-13 of 13

2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.

11.3 Click on 'Task Hyperlink' to view complete details

Task Flow View - Proposal Request
Reporter : dinesh.sharma@bdo-ea.com Completion Date Time : 2023-03-25 18:00

Dear Sir or Madam:

I am John, Procurement Officer from HVID International.

Our organization is accepting proposals from CPA firms to provide audit (and tax) services for our organization. We invite your firm to submit a proposal to us by September 30, 2022, for consideration. A description of our organization, the services needed, and other pertinent information follows:

Services to Be Performed Your proposal is expected to cover the following services:

1. Annual audit to be completed in compliance with the above filing requirement and meetings with the Audit committee and or board of directors, as necessary.
2. Tax filings for the organization and related foundation.
3. Quarterly reviews of internally prepared financial statements.

Regards,
John

Comments Logs Sub Tasks

Wed Mar 22 2023 17:10:28 GMT+0530 (India Standard Time) : important task, do right away

Wed Mar 22 2023 17:10:53 GMT+0530 (India Standard Time) : under analysis

Status: In Progress
Assignee: dinesh.sharma@bdo-ea.com
Priority: Medium
Update

12 Reports – Organization Level

12.1 Login to the 'Vizual Pro' console

12.2 The user can click on **'Reports'** followed by **'Organization Level'** and **'Task Performance Report'** to see how all tasks at the organization level are performing. The details like Task status, Avg. resolution Time, Avg. Task approval time etc. Click on **'Generate'** to generate the report

The screenshot shows the 'Reports' page in the Vizual Pro console. The left sidebar is dark with a 'Reports' button highlighted in blue. The main content area has tabs for 'Organization Level', 'Executive Level', and 'Individual Level'. Under 'Organization Level', there are input fields for 'Report Type' (set to 'My Tasks'), 'Start' (08/03/2023), and 'End' (29/03/2023). A green 'Generate Report' button is at the bottom right. The footer shows '2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.'

12.3 The report is ready for view

12.4 There is also an option to **download the report**. The report gets downloaded in CSV file format.

The screenshot shows the 'Task Performance Report' table with columns for STATUS, # TASKS, # ON TIME, # DELAYED, AVG TASK R..., and AVG TASK A... The data is as follows:

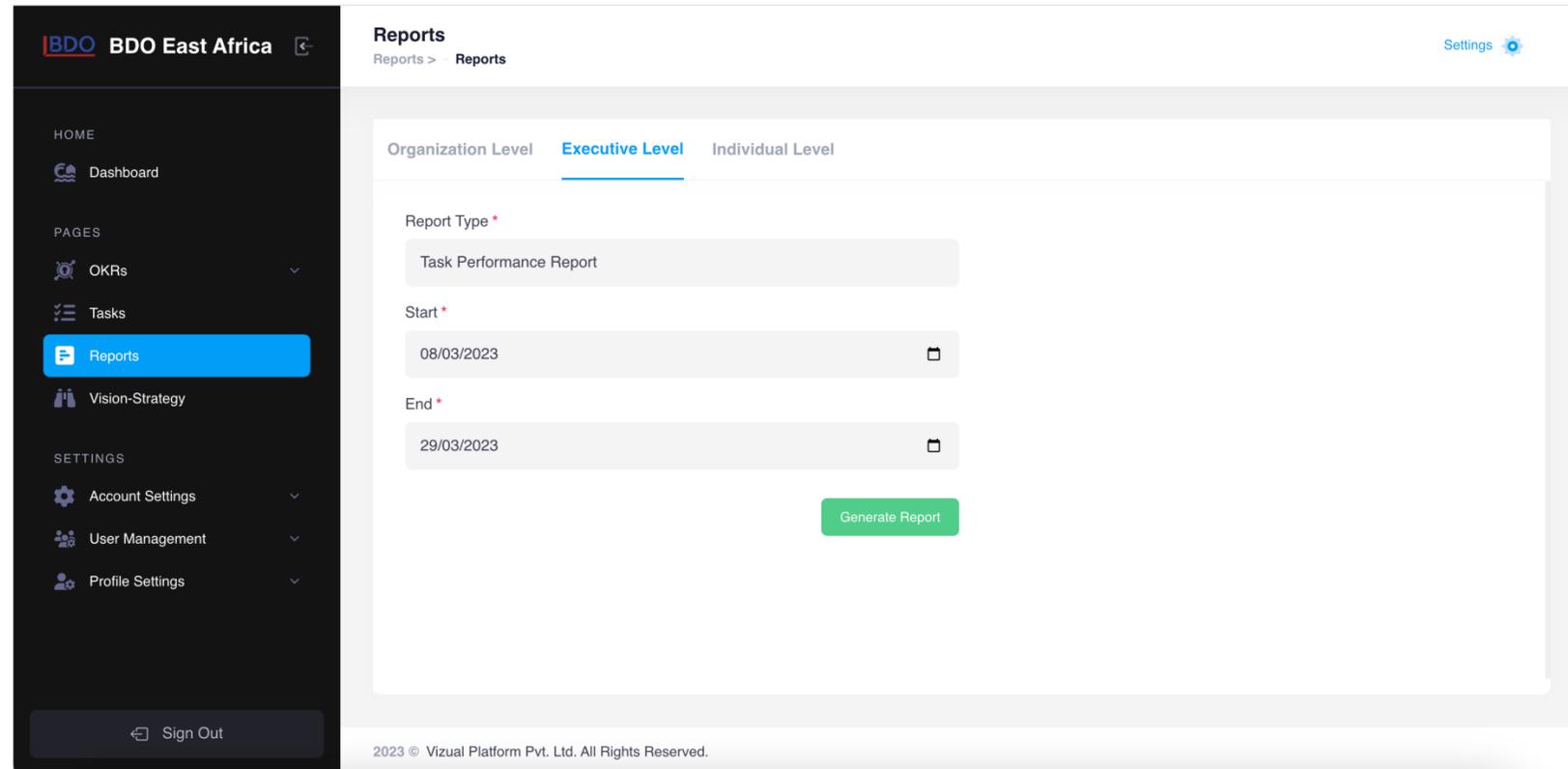
STATUS	# TASKS	# ON TIME	# DELAYED	AVG TASK R...	AVG TASK A...
In Progress	4	4	0	N/A	N/A
Reject	3	2	1	2 D 20 Hr 16 Min	2 D 20 Hr 16 Min
Approved	1	1	0	0 D 0 Hr 08 Min	0 D 0 Hr 10 Min
Open	8	8	0	N/A	N/A

Below the table, a file download dialog box is open, showing the file name 'repor_undefined (2)' and the 'Downloads' folder selected. The dialog has 'Cancel' and 'Save' buttons.

13 Reports – Executive Level

13.1 Login to the 'Vizual Pro' console

13.2 The user can click on **'Reports'** followed by **'Executive Level'** and **'Employee Performance Report'** to see how all tasks at an employee level or across all the employees are performing. The details like Task status, Avg. resolution Time, Avg. Task approval time etc. Click on **'Generate'** to generate the report.

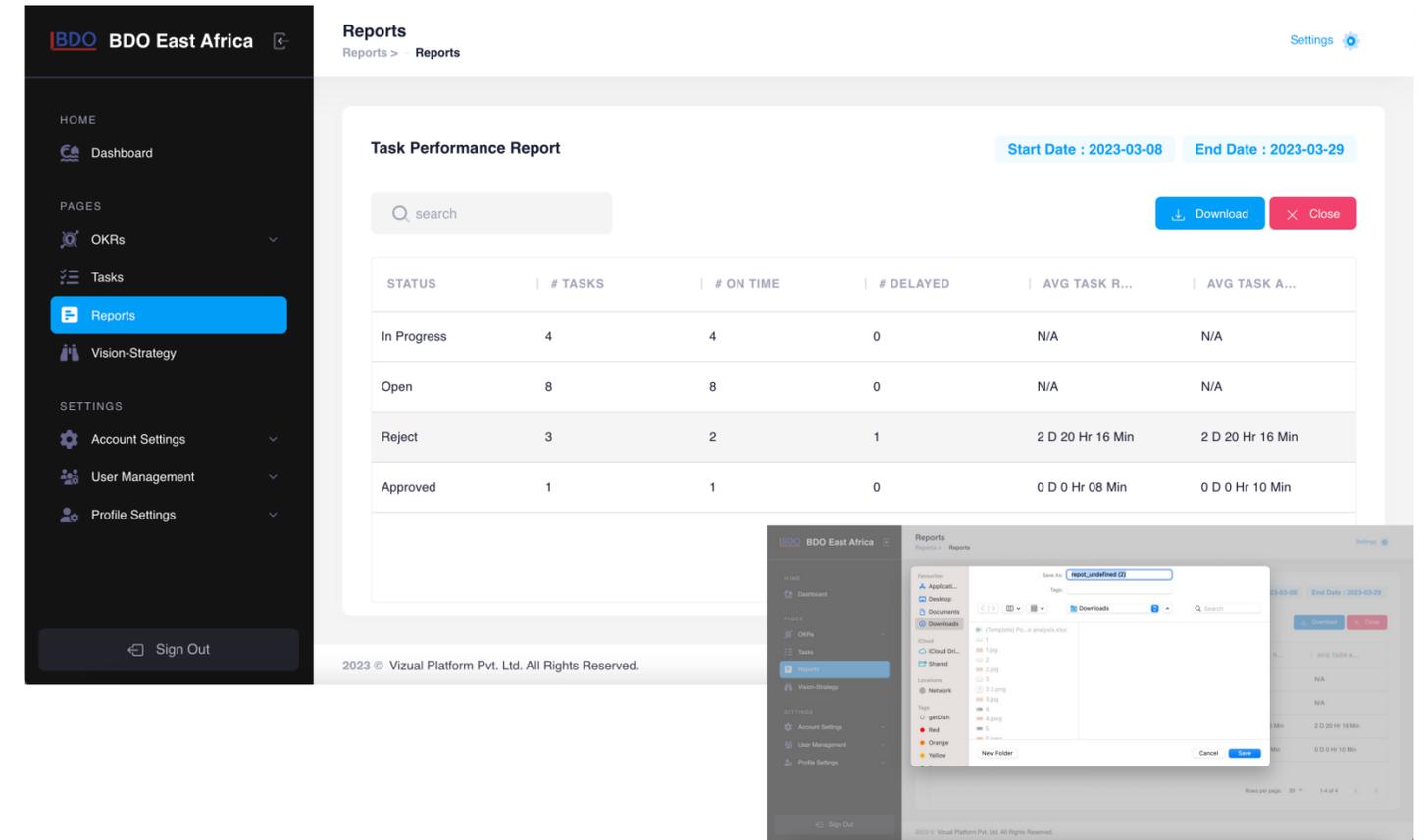


The screenshot shows the 'Reports' page in the Vizual Pro console. The 'Executive Level' tab is selected, and the 'Task Performance Report' is generated for the period from 08/03/2023 to 29/03/2023. The 'Generate Report' button is visible.

13.3 The report is ready for view

13.4 There is also an option to **download the report**. The report gets downloaded in CSV file format.

13.4 You can compare and contrast task performance against different employees



The screenshot shows the 'Task Performance Report' page in the Vizual Pro console. The report is ready for view, and the 'Download' button is visible. The table shows task status, number of tasks, on-time tasks, delayed tasks, and average task resolution times.

STATUS	# TASKS	# ON TIME	# DELAYED	AVG TASK R...	AVG TASK A...
In Progress	4	4	0	N/A	N/A
Open	8	8	0	N/A	N/A
Reject	3	2	1	2 D 20 Hr 16 Min	2 D 20 Hr 16 Min
Approved	1	1	0	0 D 0 Hr 08 Min	0 D 0 Hr 10 Min

14 Reports – Executive Level

14.1 Login to the 'Vizual Pro' console

14.2 Similar to the previous reports, there are various reports available, that can be generated and downloaded

The screenshot displays the 'Reports' section of the Vizual Platform. The left sidebar shows the navigation menu with 'Reports' highlighted. The main content area is titled 'Reports' and includes a breadcrumb 'Reports > Reports' and a 'Settings' link. The 'Executive Level' tab is selected, showing a 'Report Type' dropdown menu with options: 'Task Performance Report' (selected), 'Employee Performance Report', 'My Tasks', 'Tasks Created By Me', and 'Individual Task Status Report'. Below the dropdown is an 'End' date field set to '29/03/2023' and a 'Generate Report' button. The footer contains the copyright notice: '2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.'



18 Logout

18.1 Click on Settings Icon

18.2 Click on Logout, You will be redirected to Sign In screen

The screenshot displays the BDO East Africa web application interface. On the left is a dark sidebar with navigation options: HOME (Dashboard), PAGES (OKRs, Tasks, Reports, Vision-Strategy), and SETTINGS (Account Settings, User Management, Profile Settings). The main content area is titled "Reports" and shows a form for generating a report. The form includes tabs for "Organization Level", "Executive Level" (selected), and "Individual Level". The form fields are: "Report Type" (Task Performance Report), "Start" (08/03/2023), and "End" (29/03/2023). A "Generate Report" button is at the bottom. A user profile dropdown menu is open, showing the user's name "Dinesh Sharma" and options for "My Profile", "Account Settings", and "Sign Out". The footer contains the URL "https://email.vtp-bdo-ea.com/home/reports#" and the copyright notice "2023 © Vizual Platform Pvt. Ltd. All Rights Reserved."

User Management & Access Control



Handy tips and Instructions for Users



18 Account settings - Branding

18.1 Click on Account Settings

18.2 Click on Branding, Update the Branding information

18.3 Click on Save

18.3 Refresh the screen

The screenshot displays the 'Branding' settings page for 'BDO East Africa'. The sidebar on the left includes sections for 'HOME' (Dashboard), 'PAGES' (OKRs, Tasks, Reports, Vision-Strategy), and 'SETTINGS' (Account Settings, Branding, Categories, Departments, Region, User Management, Profile Settings). The 'Branding' option is selected in the sidebar. The main content area is titled 'Branding' and includes a breadcrumb trail: 'Account > Branding'. Below this, there are tabs for 'Branding', 'Categories', 'Departments', and 'Region'. The 'Branding' tab is active, showing a form to 'Set your Branding Info'. The form includes an 'Upload Logo' section with a file upload button and a preview of the BDO logo. Below this are input fields for 'Title' (BDO East Africa), 'Organization Name *' (BDO), 'Organization Email *' (test@gmail.com), 'Organization Address' (Provide Organization Address), and 'Organization Contact No' (Provide contact no). A green 'Save' button is located at the bottom right of the form. On the right side of the page, there is a yellow callout box titled 'What is Branding?' which explains that the branding section helps the admin to rebrand the Vizual Pro web application per their company's branding guidelines like logo, and title.

18 Account settings - Categories

18.1 Click on Account Settings

18.2 Click on Categories, Update the Category details

18.3 Click on Save

18.3 Next time when you create the Task, these categories will appear

The screenshot displays the BDO East Africa account settings interface. The sidebar on the left contains navigation options: HOME (Dashboard), PAGES (OKRs, Tasks, Reports, Vision-Strategy), and SETTINGS (Account Settings, Branding, Categories, Departments, Region, User Management, Profile Settings, Sign Out). The main content area is titled 'Categories' and shows a table of existing categories. A modal window titled 'Add New Category' is open, allowing the user to enter a new category name and description.

NAME	DESC	ACTION
Proposal	proposal category	Edit Delete
Lead Generation	Lead generation	Edit Delete
Action	Action category	Edit Delete
Complaint	Complaint Category	Edit Delete
Client Delivery	Client Delivery	Edit Delete
Others	Others category	Edit Delete

Add New Category

Name:

Description:

[Add](#) [Cancel](#)

18 Account settings - Departments

18.1 Click on **Account Settings**

18.2 Click on **Departments,**

18.3 Click on **'+ Add Departments'**

Departments

Account Departments

Branding Categories **Departments** Region

Add your Departments

search [+ Add Department](#)

NAME	DESC	HEAD	ACTION
Marketing	Marketing Department	virginiah.mwangi@bdo-ea.com	Edit Delete
IT	IT department	priscillah.githanga@bdo-ea.com	Edit Delete
Finance	Finance Manager	daniel.mulwa@bdo-ea.com	Edit Delete

Rows per page: 20 1-3 of 3

2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.

18.4 Enter the **Department Details**

18.5 Click on **Save**

18.5 The department details help to assign OKRs, view Department level insights

Add New Department

Department Name * Marketing

Department Head * virginiah.mwangi@bdo-ea.com

Color #2e2ca0

Description * Marketing Department

[Save](#) [Cancel](#)

Departments

Account Departments

Branding Categories **Departments** Region

Add your Departments

search [+ Add Department](#)

NAME	DESC	HEAD	ACTION
Marketing	Marketing Department	virginiah.mwangi@bdo-ea.com	Edit Delete
IT	IT department	priscillah.githanga@bdo-ea.com	Edit Delete
Finance	Finance Manager	daniel.mulwa@bdo-ea.com	Edit Delete

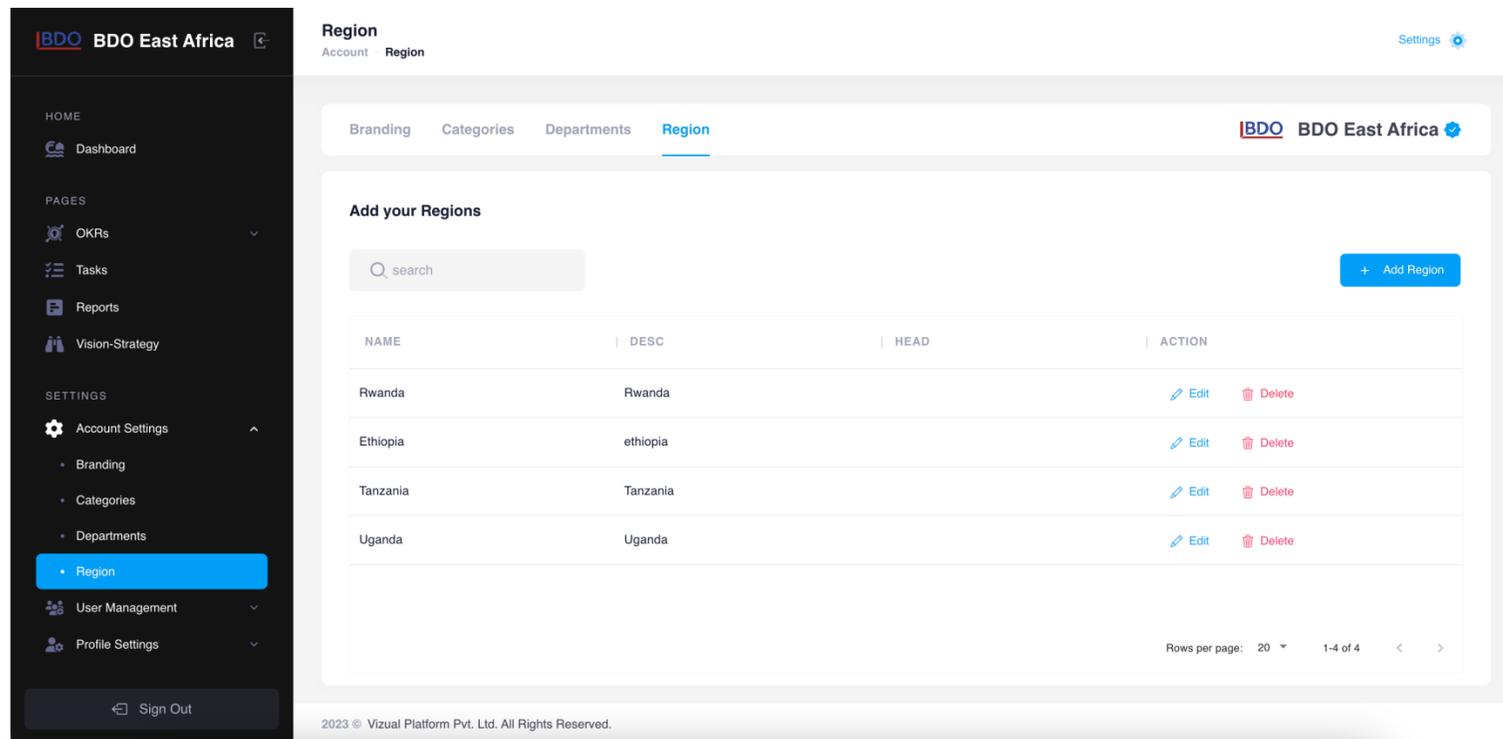
Rows per page: 20 1-3 of 3

2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.

18 Account settings - Regions

18.1 Click on Account Settings

18.2 Click on Regions – This helps to add multiple countries part of a Region



Region
Account - Region

Branding Categories Departments **Region**

Add your Regions

search + Add Region

NAME	DESC	HEAD	ACTION
Rwanda	Rwanda		Edit Delete
Ethiopia	ethiopia		Edit Delete
Tanzania	Tanzania		Edit Delete
Uganda	Uganda		Edit Delete

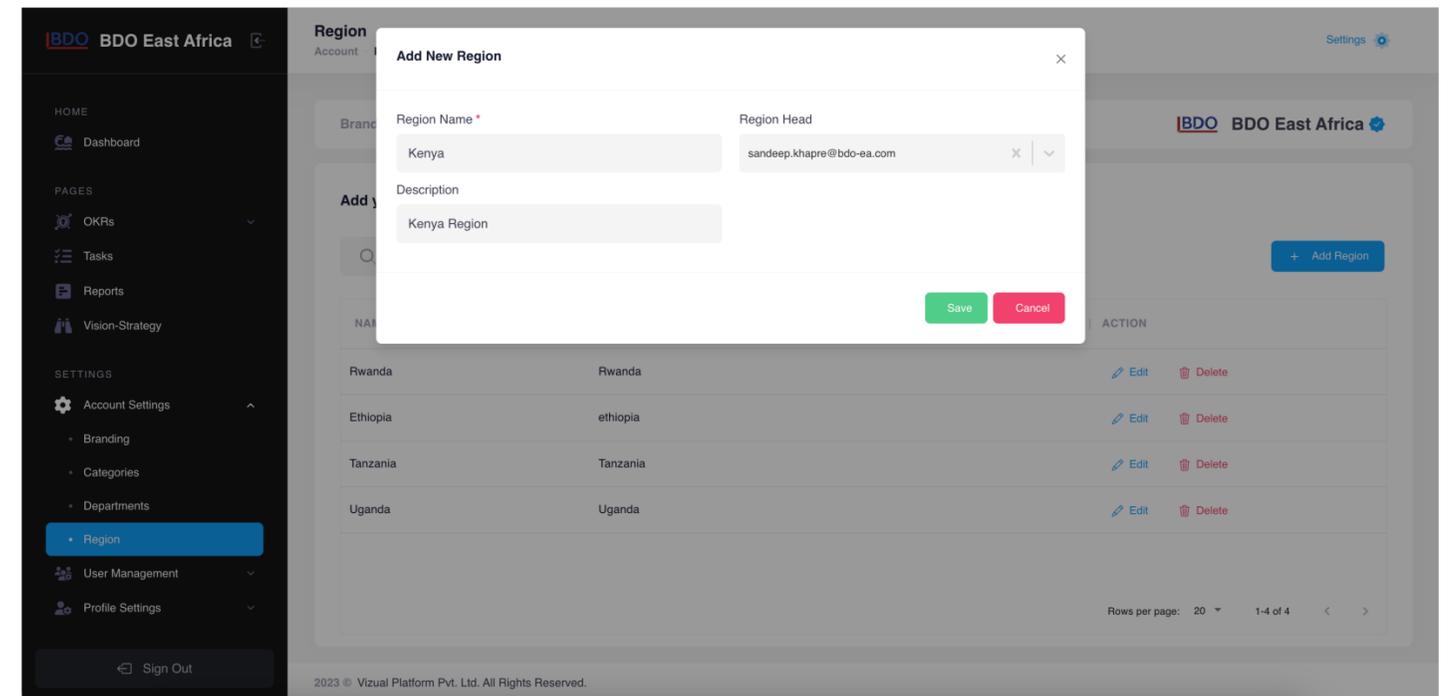
Rows per page: 20 1-4 of 4

2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.

18.4 Enter the Department Details

18.5 Click on Save

18.5 The department details help to assign OKRs, view Department level insights



Region
Account - Region

Branding Categories Departments **Region**

Add New Region

Region Name * Kenya Region Head sandeep.khapre@bdo-ea.com

Description Kenya Region

Save Cancel

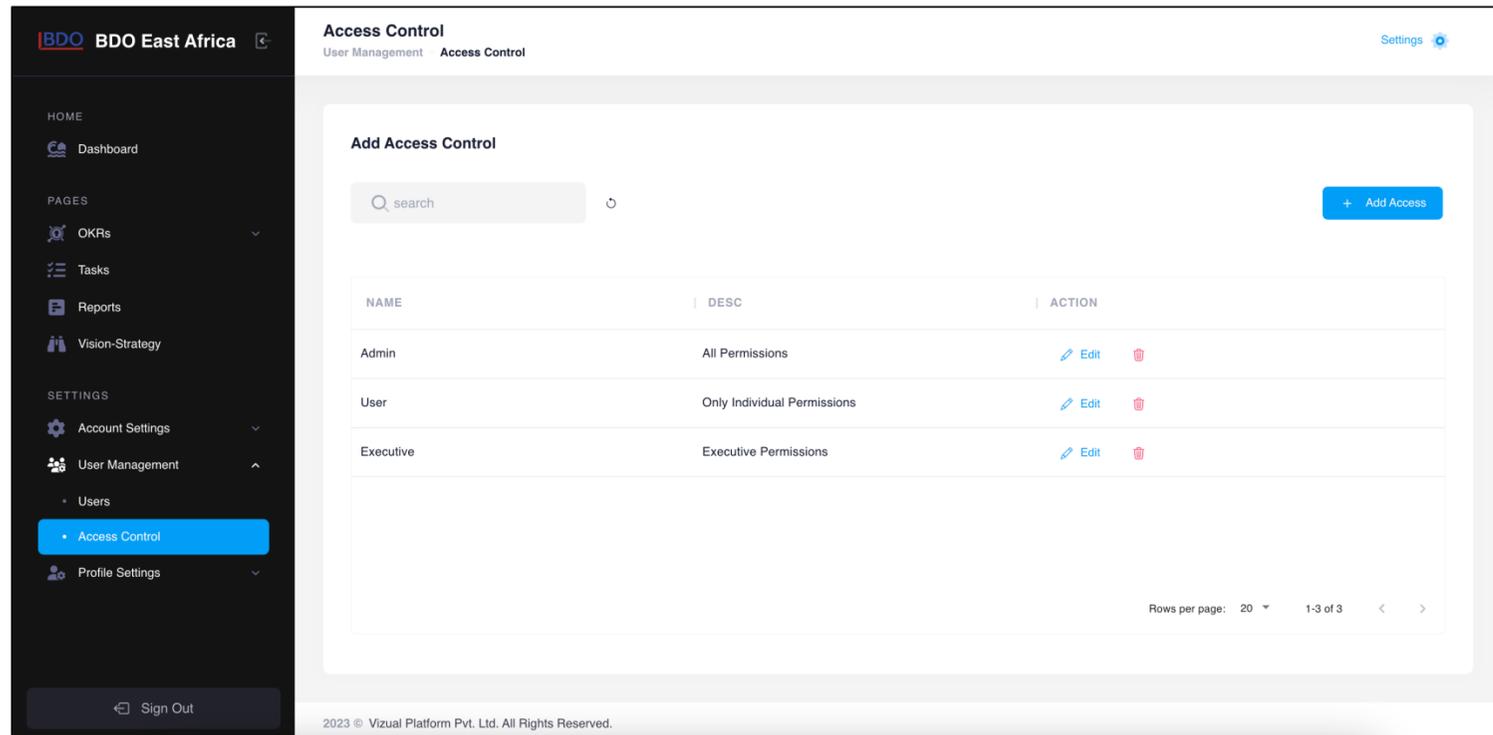
Rows per page: 20 1-4 of 4

2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.

18 User Management – Access Control

18.1 Click on User Management

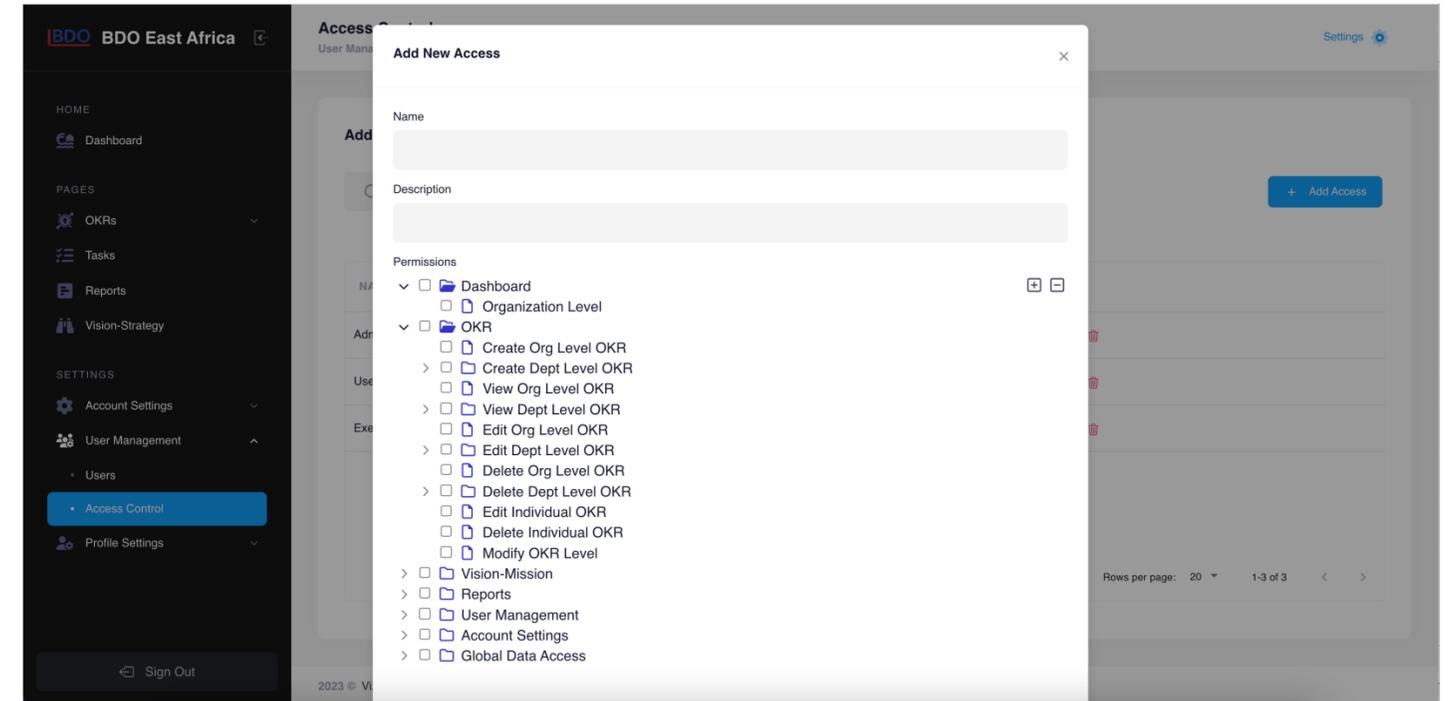
18.2 Click on Access Control – This will show all the available roles.



18.4 You can create a new role by clicking on +Add Access

18.5 The Add access will show all the features to which access can be given

18.5 Define the role, select the access and click on 'Add'



18 User Management – Users – View, Add individual, Bulk add using Import

18.1 Click on User Management

18.2 Click on Users – This shows the existing users

The screenshot shows the 'Users' page in the BDO East Africa system. The page title is 'Users' and it is part of the 'User Management' section. The main content area is titled 'Add Users' and contains a search bar and three buttons: '+ Add User', 'Import Users', and 'Download Template'. Below this is a table of existing users:

NAME	EMAIL ID	ROLE	REGION / COUN...	STATUS	ACTION
Aaron Uringtho	aaron.uringtho@bdo-ea.com	User	Uganda		Edit Delete
Abdoul Salam Bamporiki ...	abdoul.birasa@bdo-ea.com	User	Rwanda		Edit Delete
Abdullahi Tahlil Adam	abdullahi.tahlil@bdo-ea.com	User	Rwanda		Edit Delete
Abel Segikwiye	abel.segikwiye@bdo-ea.c...	User	Rwanda		Edit Delete
Abel Seid	abel.seid@bdo-ea.com	User	Ethiopia		Edit Delete

At the bottom of the table, it shows 'Rows per page: 20' and '1-20 of 318'. The footer of the page reads '2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.'.

18.4 Add users using '+ Add users'

18.5 You can add users individually, by entering the details, specifically add the **User Type** based on the access created in the previous step and clicking on 'Save'

18.5 You can export the template and add the users in the CSV format and import the users through bulk import option

The screenshot shows the 'Add New User' modal form in the BDO East Africa system. The form is titled 'Add New User' and contains the following fields:

- Email Id: Choose Email Id (dropdown menu)
- Name: Text input field
- Reporting To: Choose Manager (dropdown menu)
- User Type: Text input field

The background shows the 'Users' page with the 'Add Users' section visible, including the search bar and buttons for '+ Add User', 'Import Users', and 'Download Template'. The footer of the page reads '2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.'.

18 Profile Settings – Personal Info

18.1 Click on **Profile Settings**

18.2 Click on **Personal Info**

18.2 Update the Personal Info and click on '**Update Profile**'

The screenshot displays the 'Personal Info' settings page in the BDO East Africa system. The page is titled 'Personal Info' and includes a breadcrumb trail 'Profile > Personal Info'. A user profile card for 'Dinesh Sharma' is shown at the top, with a profile picture, name, location (Kenya), and email address (dinesh.sharma@bdo-ea.com). Below this, the 'Personal Info' section contains three input fields: 'First Name' (pre-filled with 'Dinesh Sharma'), 'Last Name' (pre-filled with 'Last Name'), and 'Profile Pic' (with a 'Choose file' button and 'No file chosen' text). A green 'Update Profile' button is located at the bottom right of the form. The left sidebar menu is visible, with 'Personal Info' highlighted under the 'Profile Settings' category. The footer of the page reads '2023 © Vizual Platform Pvt. Ltd. All Rights Reserved.'

**Your
Feedback
matters.**

Thank You!