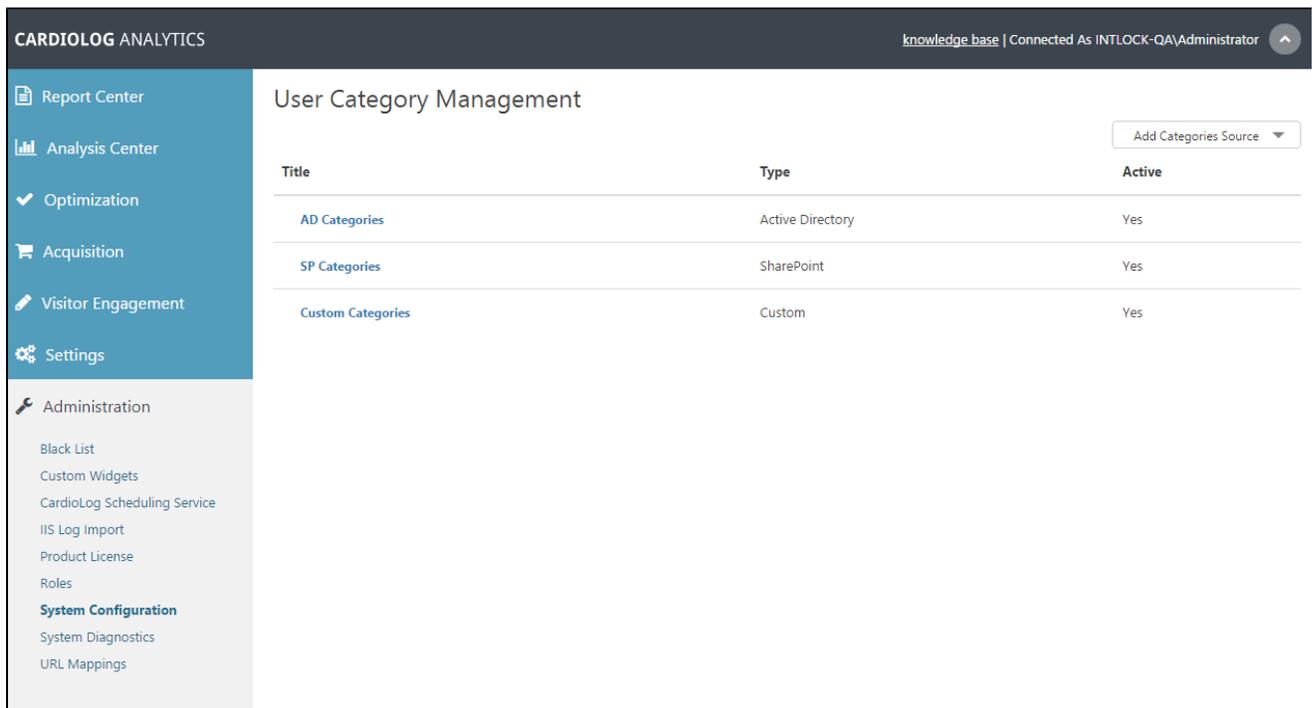# User Category Management

CardioLog easily integrates personal user data into reports and provides advanced visitor segmentation capabilities by using existing user directories. The User Categories Updates service retrieves user information such as department, location, gender, and any other profile data automatically. In order to retrieve data, first configure Active Directory and/or SharePoint User Profile integration. The User Categories Updates service can also retrieve data from a custom source using the custom user categories adaptor. If you use multiple Active Directory networks, and/or multiple SharePoint farms, CardioLog can also integrate multiple sources, and allows you to customize all categories you would like to draw from for each service.

Contents

- Configure a New Visitor Segmentation Source
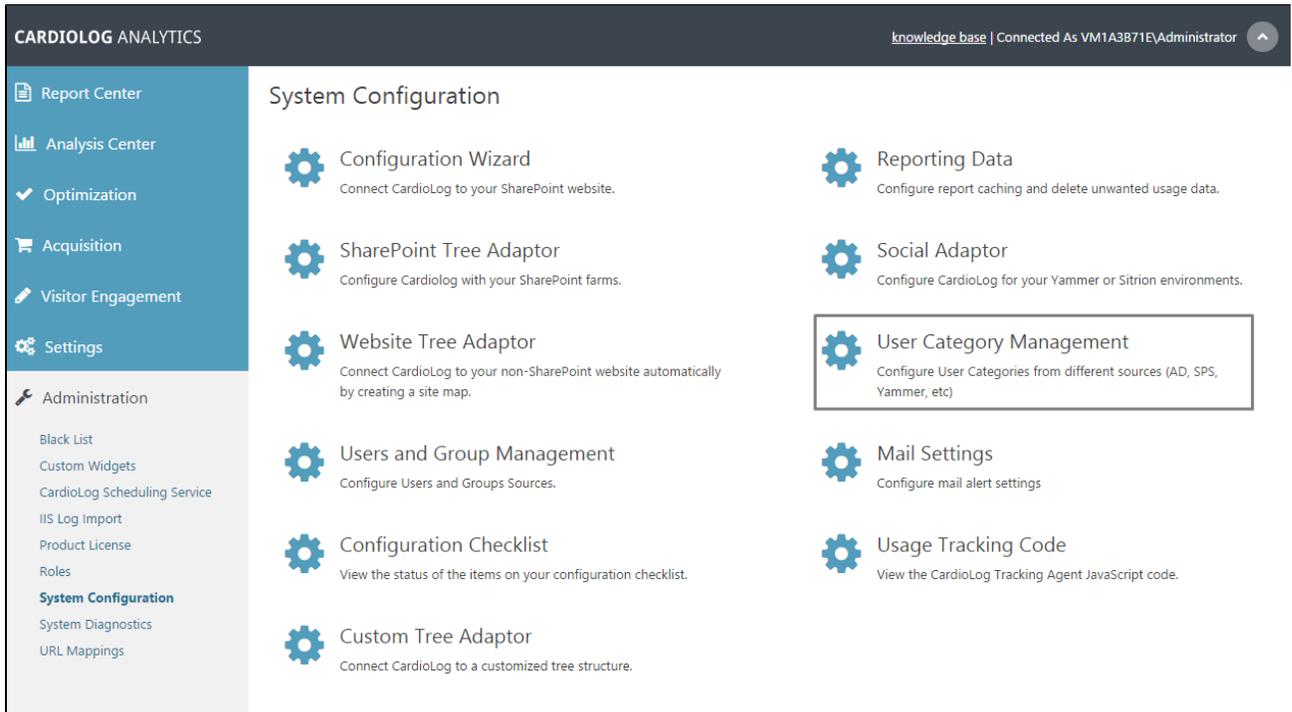 - Active Directory
  - SharePoint
  - Custom Source

User Category Management Main Window

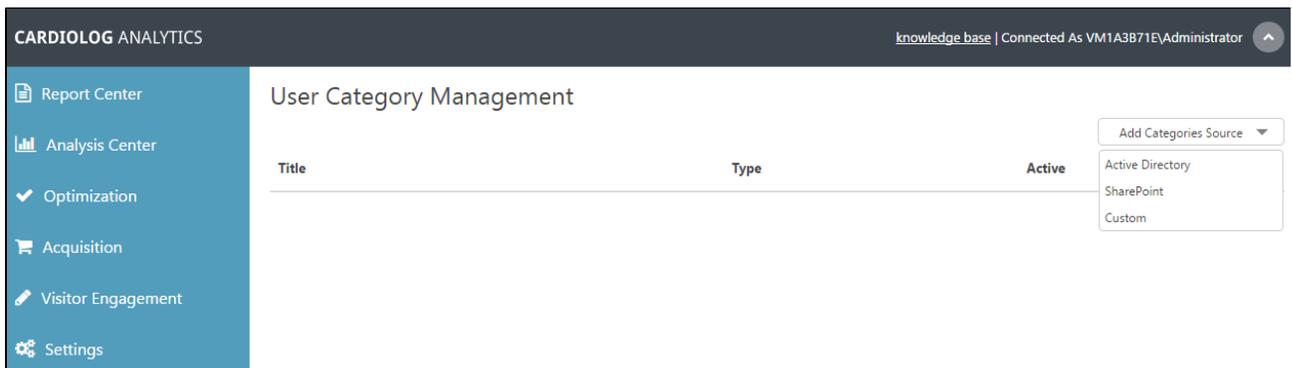## Configure a New Visitor Segmentation Source

In order to retrieve additional user information such as department, gender, title or any other category available from either Active Directory attributes, or SharePoint User Profiles, first begin by following these steps:

1. From the navigation pane in **CardioLog** go to **Administration** > **CardioLog Scheduling Service** > **User Category Updates**.
2. Set the service **Scheduling Type** to Daily at 00:00.
3. Click **OK**.
4. From the **Administration** navigation pane, select **System Configuration**, and then select **User Category Management** from the main window.

System Configuration Main Window

5. Click **Add Categories Source** in the top right-hand corner, and select either Active Directory or SharePoint.

User Category Management: Select Source

Configuring Visitor Segmentation by Active Directory Attributes

To integrate Active Directory Attributes into reports, first begin by configuring a new visitor segmentation source, and then continue by following these steps:

1. Title your Active Directory source.
2. Select a **Users and Groups Source** from the drop down menu if one isn't chosen automatically.

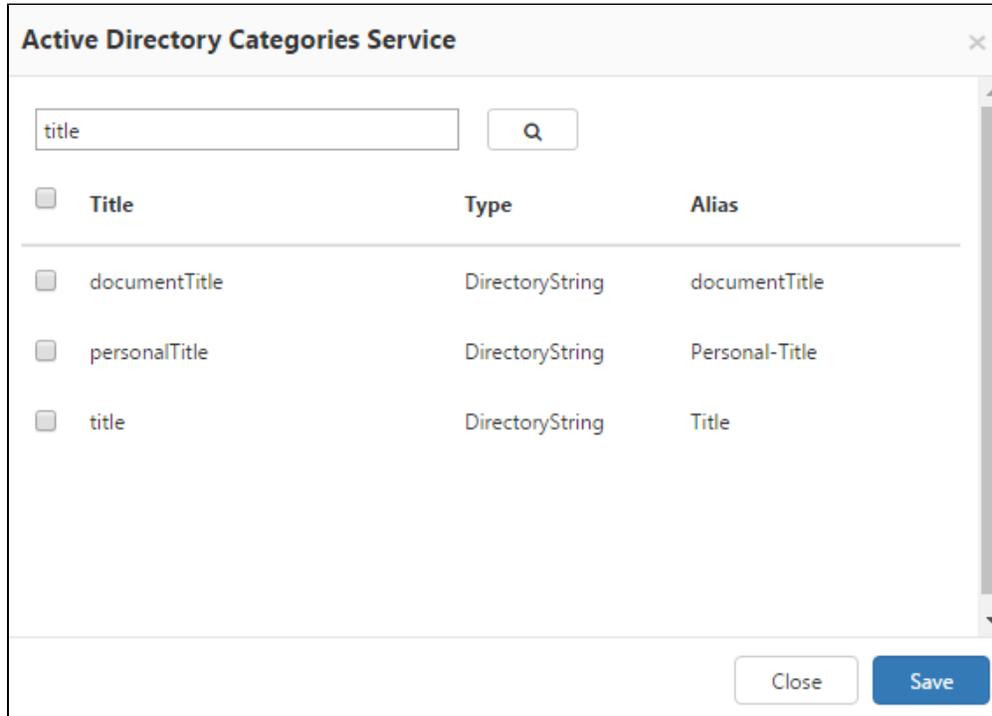*User Category Management: Active Directory Categories Service*

3. For **Categories**, click **Add** to include any additional category types you would like available in all relevant reports.

Active Directory Categories Source - Add Category

4. In the Active Directory Categories Service dialogue window, search for any category types you would like to add.

Active Directory Categories Source - Search Categories

5. Enable the check box next to all categories you would like to include. Click **Save** to continue.
6. In the Active Directory Categories Service main window, check the box next to a category and click **Remove** to make the given category unavailable in all relevant reports and analysis. You may also perform this action at any time following configuration.
7. Click **Save** to confirm any changes and return to the dashboard.
8. Go to **CardioLog Scheduling Service** under **Administration** in the navigation pane and click **Restart Service** in the upper right hand corner.
9. After the next scheduled User Category Update, your Active Directory attributes will be made available in the **Visitor Segments** filter of each report, under **User Categories**.

Note: The User Categories filter can only be applied once the User Categories Updates is configured, not retroactively. In order to map usage data history to user categories please contact us.

Configuring Visitor Segmentation by SharePoint User Profiles

To integrate SharePoint User Profiles into reports, follow these steps:

1. In the **Administration** section of the navigation pane, click **System Configuration**, and then select **SharePoint Tree Adaptor**.
2. Select your SharePoint farm.
3. In the **SharePoint Tree Adaptor** dialog, fill out the following fields:
   - **SharePoint Profile Database Name** - Add the *db_datareader* SQL permissions to the CardioLog service account for the SharePoint profile database.
4. Configure a new visitor segmentation source.
5. Title your SharePoint Category.
6. Select the SharePoint Adaptor version you would like to access from the drop down menu if the correct one isn't chosen automatically.

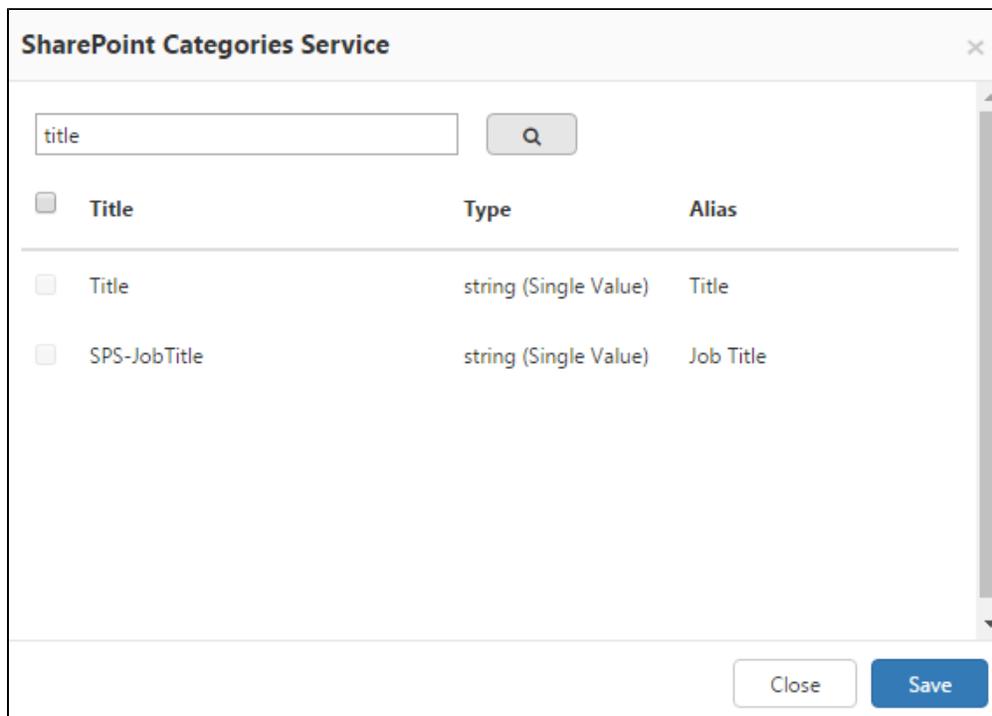*User Category Management - SharePoint Categories Service*

7. For **Categories**, click **Add** to include any additional category types you would like available in all relevant reports.

SharePoint Categories Service dialogue window - Add Categories

8. In the SharePoint Categories Service dialogue window, search for any category types you would like to add.

SharePoint Categories Service: Search Categories

9. Enable the check box next to all categories you would like to include. Click **Save** to continue.
10. In the Active Directory Categories Service main window, check the box next to a category and click **Remove** to make the given category unavailable in all relevant reports and analysis. You may also perform this action at any time following configuration.
11. Click **Save** to confirm any changes and return to the dashboard.
12. Go to **CardioLog Scheduling Service** under **Administration** in the navigation pane and click Restart Service in the upper right hand corner.
13. After the next run of the User Categories Updates service, your SharePoint User Profile properties will be added to the **Visitor Segments** filter of each report, under **User Categories**.

Note: The User Categories filter can only be applied once the User Categories Updates is configured, not retroactively. In order to map usage data history to user categories please contact us.

Configuring a Custom User Category Service

CardioLog also allows for custom user category management from other sources. For more information see Custom User Categories Adaptor for formatting and import options.

User Category Management: Custom Source