



Lesson 3: ADMIN Fundamentals

Practice 3-1: Study the Organization Profile

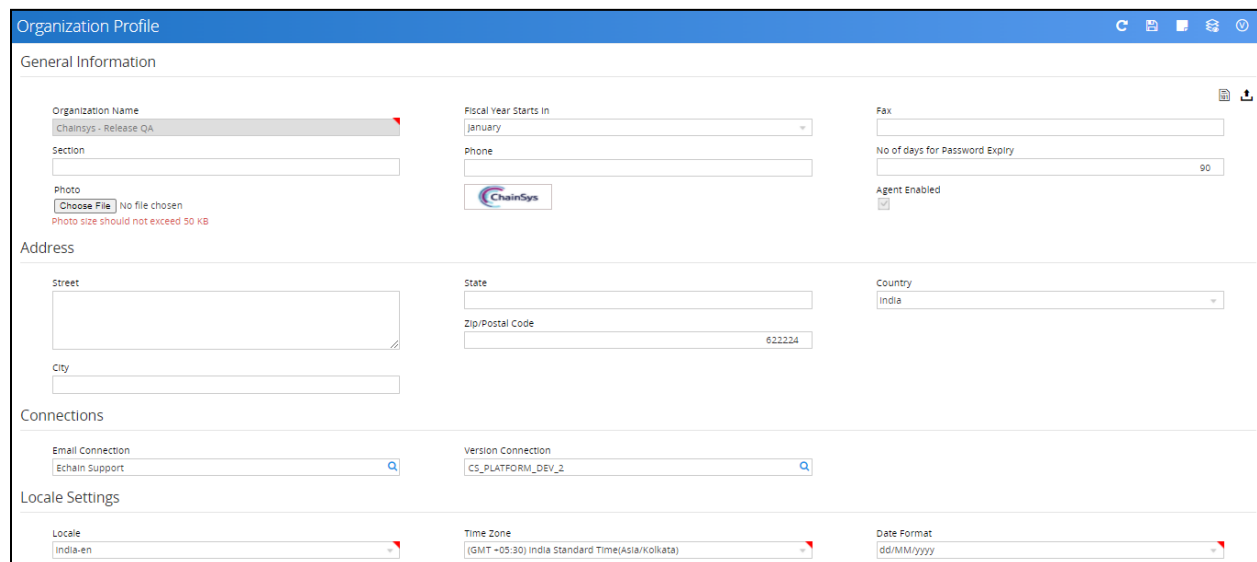
Note:

Please do not save the form, as this organization profile is being used by multiple users.

In this practice, you will learn about the organization profile in ADMIN.

1. Navigate the below link to view the Organization Profile.

ADMIN > Organization > Organization Profile



Organization Profile

General Information

Organization Name: ChainSys - Release QA

Fiscal Year Starts in: January

Fax:

Section:

Phone:

No of days for Password Expiry: 90

Photo: Choose File No file chosen
Photo size should not exceed 50 KB

Agent Enabled: ☒

Address

Street:

State:

Country: India

Zip/Postal Code: 622224

City:

Connections

Email Connection: Echain Support

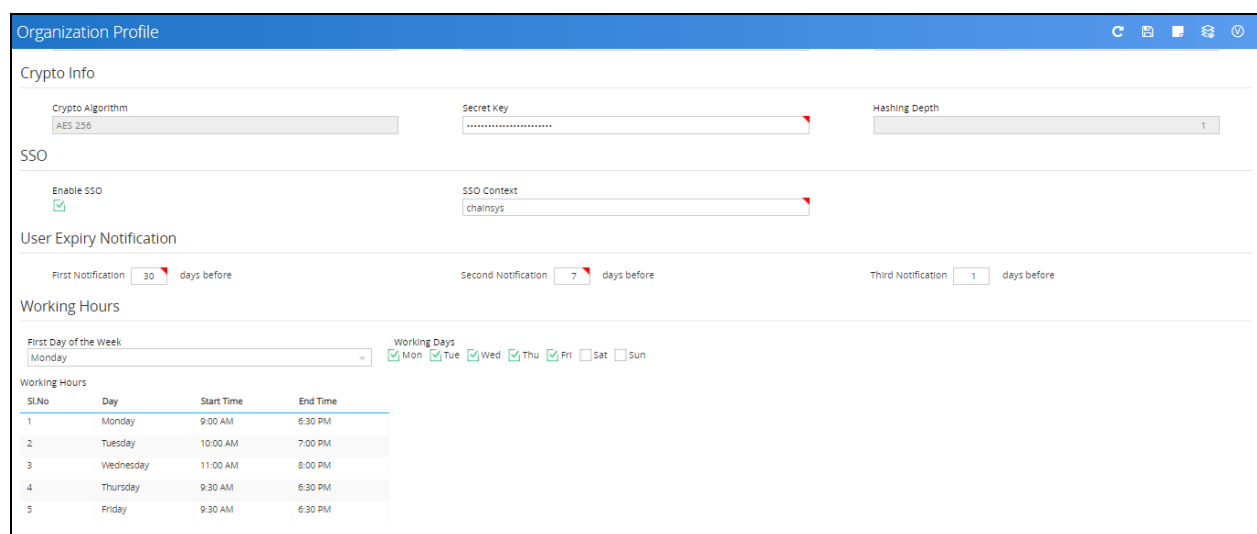
Version Connection: CS_PLATFORM_DEV_2

Locale Settings

Locale: India-en

Time Zone: (GMT +05:30) India Standard Time(Asia/kolkata)

Date Format: dd/MM/yyyy



Organization Profile

Crypto Info

Crypto Algorithm: AES 256

Secret Key:

Hashing Depth: 1

SSO

Enable SSO: ☒

SSO Context: chainsys

User Expiry Notification

First Notification: 30 days before

Second Notification: 7 days before

Third Notification: 1 days before

Working Hours

First Day of the Week: Monday

Working Days: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat ☐ Sun

SLNo	Day	Start Time	End Time
1	Monday	9:00 AM	6:30 PM
2	Tuesday	10:00 AM	7:00 PM
3	Wednesday	11:00 AM	8:00 PM
4	Thursday	9:30 AM	6:30 PM
5	Friday	9:30 AM	6:30 PM

2. In the general information section, add the following details

- a. **Organization Name:** Name of the Organization has defaulted here and it is non-editable (Example: CSBU_Rolexx.)
 - b. **Division :** CSApac_Rolexx
 - c. **Fiscal Year Starts In :** January
 - d. **Phone :** 517627XXXX
 - e. **Fax :** 517627XXXX
 - f. **No of days for Password Expiry :** 90
3. In the Address section, add the following details
- a. **Street :** 325 S.Clinton Street,Suite 205
 - b. **City :** Grand Ledge
 - c. **State :** Michigan
 - d. **Zip/Postal Code :** 48837
 - e. **Country :** United States
4. In the Connections section, add the following details
- a. **Email Connection :** CSSupport
 - b. **Version Connection :** CSBU_XXXX
5. In the Local Setting section, add the following details
- a. **Locale :**United States-en
 - b. **Time Zone :** (GMT -05:00) Eastern Standard Time(America/Kentucky/Monticello)
 - c. **Date Format :** MM-DD-YYYY
6. In the Local Setting section, add the following details
- a. **Enable SSO :** Check the box to enable
 - b. **SSO Context :**SmallNewOrg

Practice 3-2: Identify the list of Predefined Roles

In this practice, you will identify the list of predefined roles which are being used in dataZap.

1. Sign in with your user id, password and navigate to ADMIN application.
2. Write down the navigation path and find out the list of predefined roles in the dataZap.

Practice 3-3: Create a Role

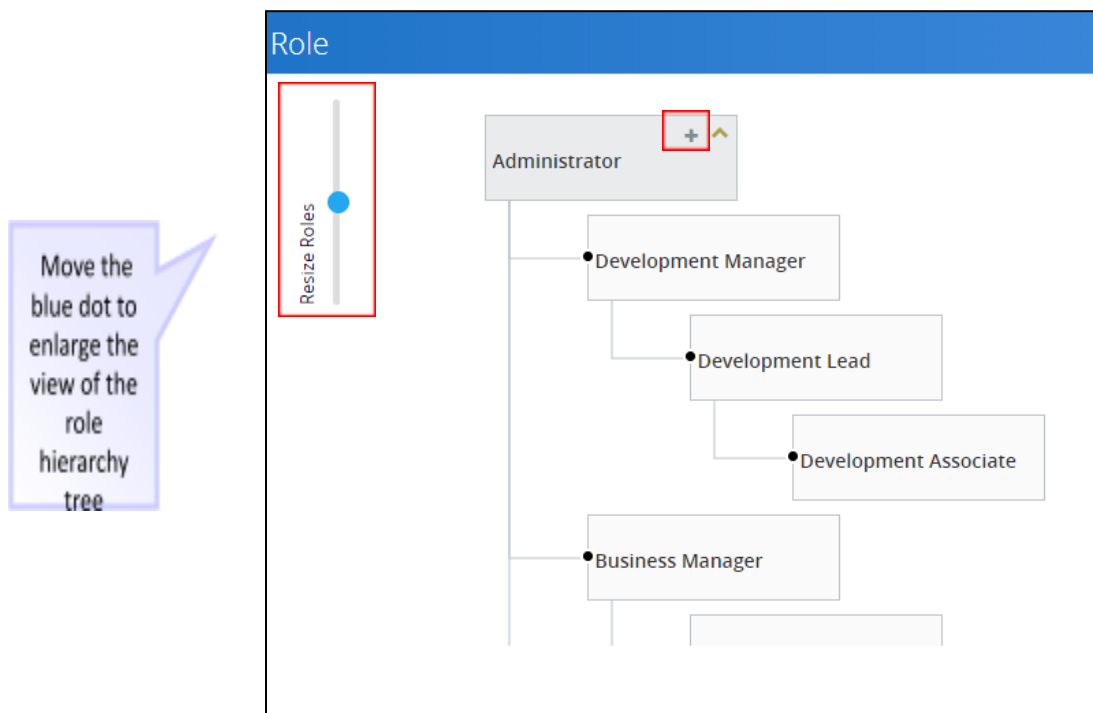
In this practice, you will learn how to create a role in dataZap.

Note:

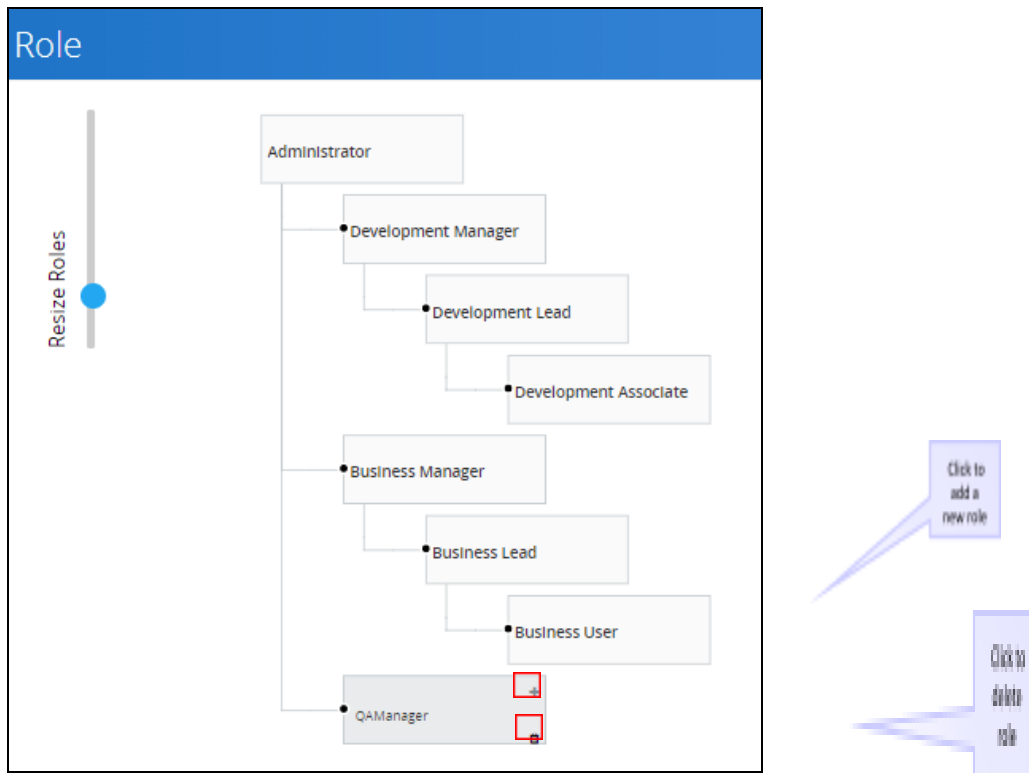
Please follow the same naming convention throughout the workbook while creating Roles, Responsibilities and users etc.. Please name it as <EMPID>_<Role Name>. For example, the Role name to be 247_QAManager.

1. Navigate the below link to create roles.

ADMIN ▢ Application and Menu switcher ▢ Role



2. Click the **Administrator** to create a new subordinate role.
3. Click on **+** icon shown in the image below to create a new role.
4. Role name should be: **QAManager**. (Example: 247_ QAManager).



5. A **delete** icon is shown on the newly created role. It can be deleted anytime.
6. When you click on the QAManager, the below window will open.
7. You can edit the **Name** and **Description** of the role but **Superior Role** can't be edited.

The 'Role Information' dialog box is used to edit role details. It contains three input fields: 'Name' (containing 'QAManager'), 'Description' (containing 'QAManager'), and 'Superior Role' (containing 'Administrator'). Each field has a red triangle icon on the right. At the bottom are two buttons: 'Reset' and 'Save'.

Practice 3-4: Identify the list of Predefined Responsibilities

In this practice, you will identify the predefined Responsibilities which are being used in dataZap.

1. Sign in with your user id, password and navigate to ADMIN application.
2. Write down the navigation path and find out the list of predefined Responsibilities in the dataZap.

Practice 3-5: How to Create a Responsibility

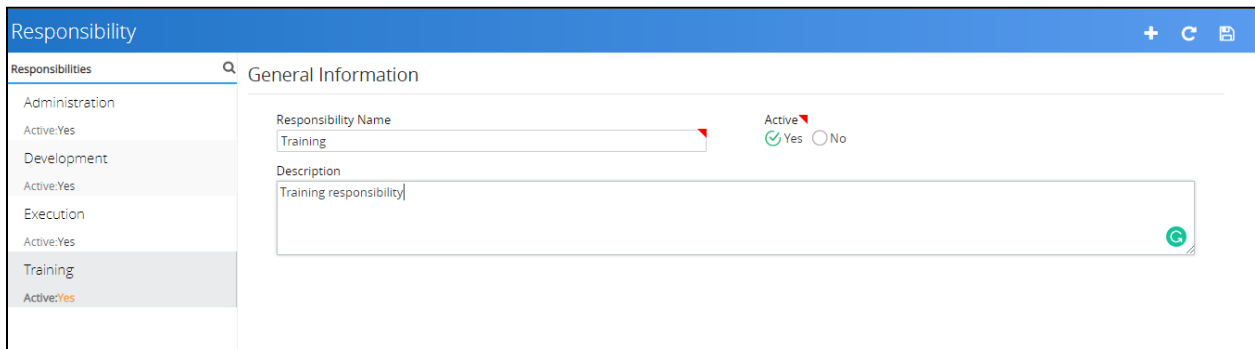
In this practice, you will learn how to create a responsibility in dataZap.

Note:

Please follow the same naming convention throughout the workbook while creating Roles, Responsibilities and users etc.. Please name it as <EMPID>_Responsibility Name. For example, the Responsibility name to be 247_Training where 247 is the Employee ID of the trainee.

1. Navigate the below link to create responsibility.

ADMIN-> Roles & Responsibilities -> Responsibility



2. In the general information section, add the following details.
 - a. **Responsibility:** Training (**Example:** 247_Training).
 - b. **Active:** Yes
3. Enter a detailed **Description** of the responsibility.
4. Click on the **save icon** from the top right corner.

Practice 3-6: Identify the list of Predefined Responsibilities Assigned to Role

In this practice, you will identify the list of predefined responsibilities assigned to the role.

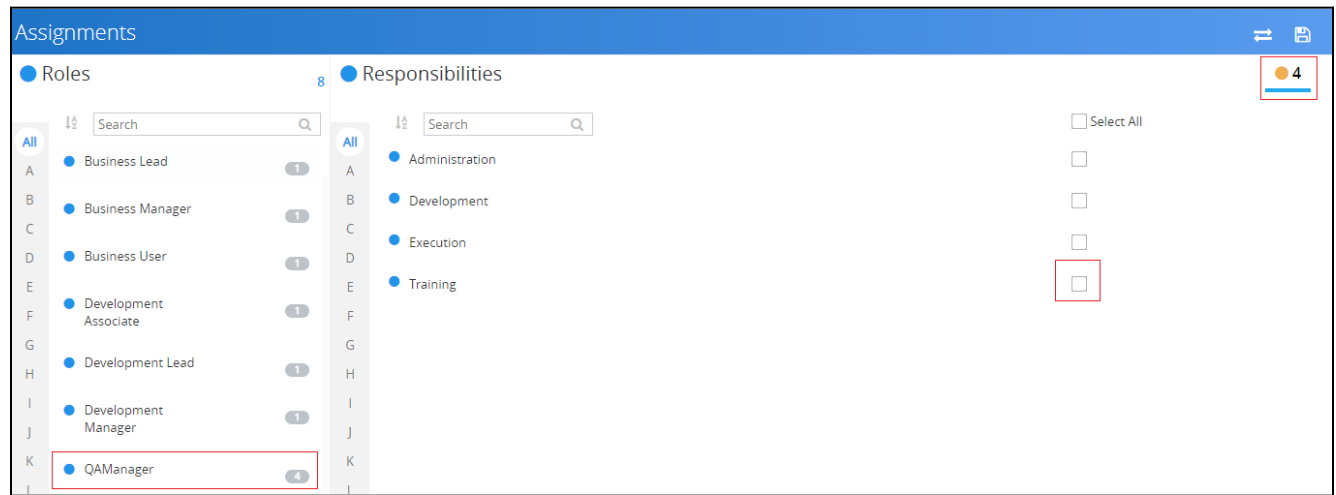
1. Write down the list of predefined Responsibilities assigned to roles in the dataZap.

Practice 3-7: Assigning Responsibilities to Role

In this practice, you will learn how to assign responsibilities to roles in dataZap.

1. Navigate the below link to assign Responsibilities to Role.

ADMIN-> Roles & Responsibilities -> Assign Responsibilities to Roles



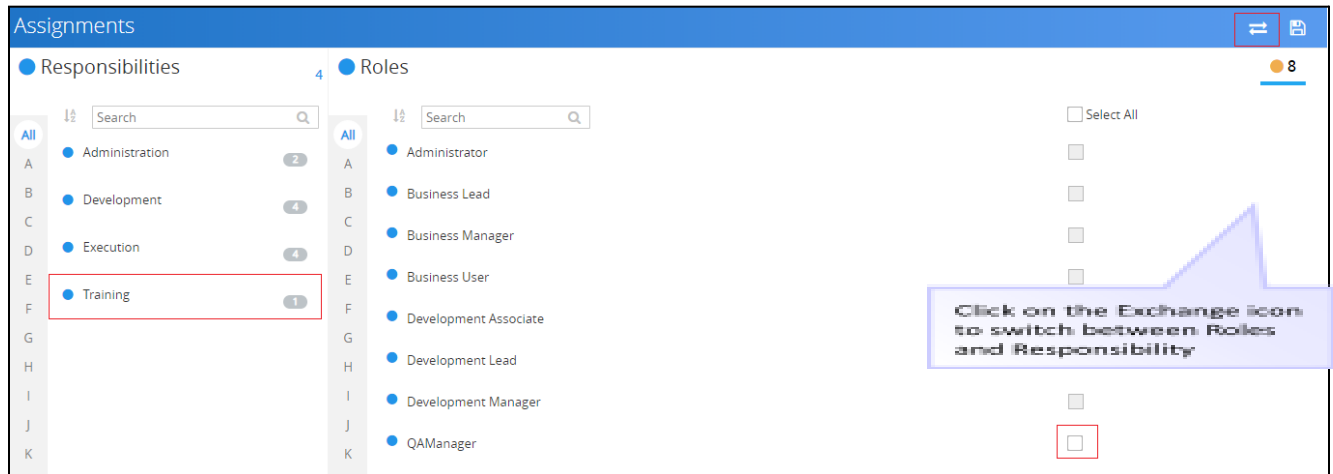
2. Select the role '**QAManager**' from the left pane to assign responsibilities.(Refer Role created in Practice 3-3)
3. Select '**Training**' Responsibility from the right pane.
4. Click the **Save icon** to save the form.

Practice 3-8: Assigning Roles to Responsibility

In this practice, you will learn how to assign roles to responsibility in dataZap.

1. Navigate the below link to assign Roles to Responsibility

ADMIN-> Roles & Responsibilities -> Assign Responsibilities to Roles



2. Click on the **Exchange icon** in the top right corner.
3. Select the responsibility '**Training**' from the left pane to assign role.(Refer Responsibility created in Practice 3-5)
4. Select '**QAManager**' from the right pane.
5. Click the **Save icon** to save the form.

Practice 3-9: Creating a User

In this practice, you will learn how to create a user in dataZap.

1. Administrators can create user accounts for the employees of the respective organizations to access and work on the ChainSys Platform.

appADMIN-> User Management -> User

The screenshot shows the 'User' management form in the appADMIN interface. The form is divided into two main sections: 'General Information' and 'Additional Information'.

General Information:

- Username:** sindhujaa.anantha@chainsys.com
- Title:** Enter Title
- First Name:** Enter First Name
- Last Name:** Enter Last Name
- Email Id:** Enter valid email
- Role:** Select Role
- Manager:** Select Manager
- Start Date:** 2-DEC-2021
- End Date:** Select the End date
- User Principal Name:** Enter the User Principal Name
- Active:** Yes (selected), No
- Password:** Password field with masked characters

Additional Information:

- Business Unit:** Select Business Unit
- Department:** Select Department
- Country:** -Select-

2. In the general information section, add the following details.
 - a. **Username:**john.scott
 - b. **First Name:** John (Your FirstName).
 - c. **Last Name:** Scott (Your LastName).
 - d. **Role:** QAManager
 - e. **Title:** Quality Manager
 - f. **Email id:**John.Scott @XXX.com (Your email id).
 - g. **Active:** Yes
 - h. **Manager:** administrator@XXX.com
 - i. **User Principal Name:** administrator@XXX.com

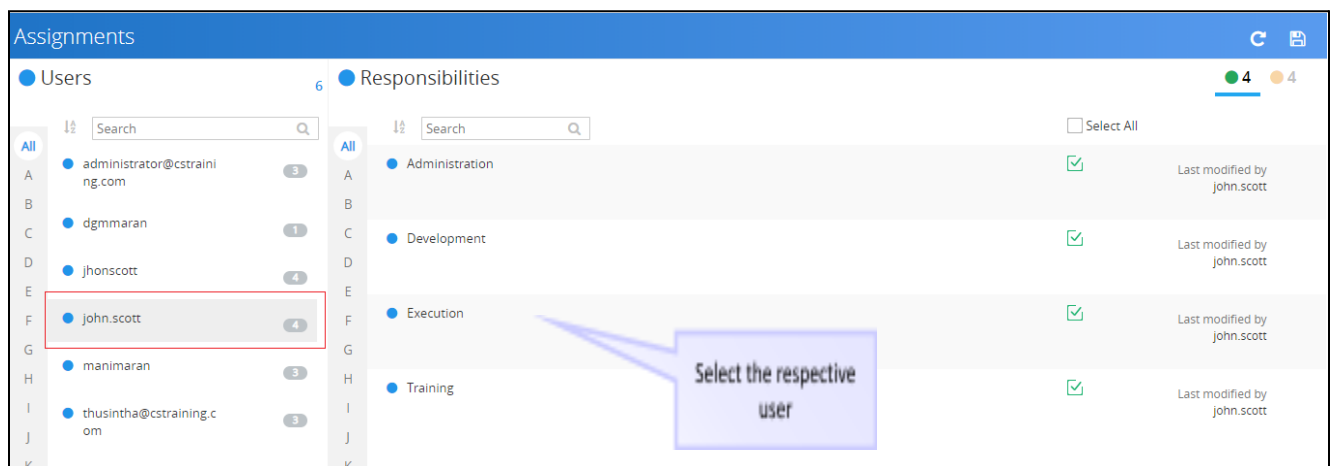
Practice 3-10: Assigning Responsibilities to User

In this practice, you will learn to assign responsibilities to users in dataZap.

1. Assigning responsibilities to a user enables the respective user to get access and privileges to the objects (Loader, Extract, Dataflow, etc.).

appADMIN-> Roles & Responsibilities -> Assign Responsibilities to User

2. Select the users '**john.scott**' (your username) in the left pane to assign responsibilities.



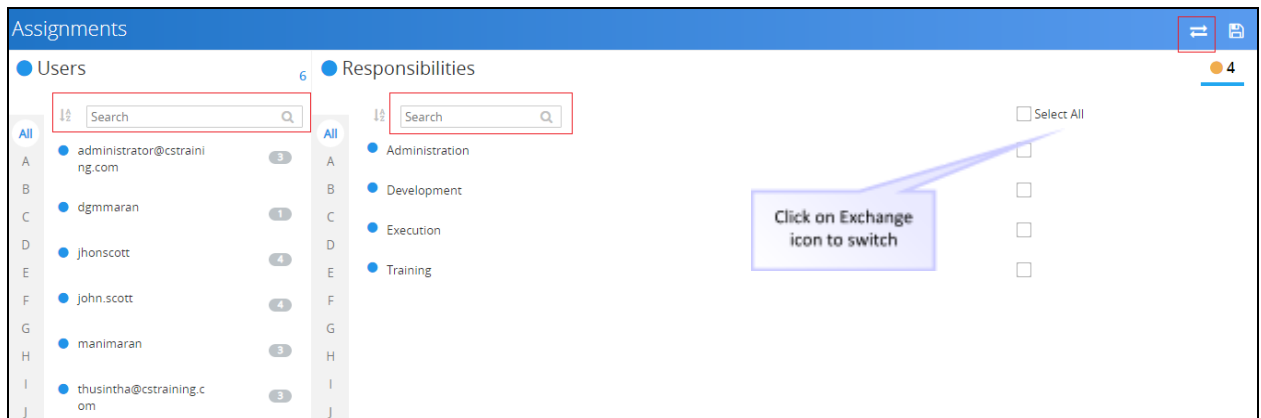
3. Select the '**Training**' responsibility along with predefined responsibilities Administration, Developments and Execution from the right pane.
4. Click the **Save icon** to save the form.

Practice 3-11: Assigning Users to Responsibility

In this practice, you will learn how to assign users to responsibility in dataZap.

1. Assigning users to a responsibility enables the respective user to get access and privileges to the objects (Loader, Extract, Dataflow, etc.).

appADMIN-> Roles & Responsibilities -> Assign Responsibilities to User



2. Click on the **Exchange icon** in the top right corner.
3. Select the responsibility '**Training**' from the left pane to assign users.
4. Select the user '**john.scott**' from the right pane.
5. Click the **Save icon** to save the form.

Practice 3-12: Assigning Role to User

Note:

Please do not change the existing Role.

In this practice, you will learn how to assign a Role to a user in dataZap.

1. Administrators can create user accounts for the employees of the respective organization to access and work on the ChainSys Platform.

appADMIN-> User Management -> User

The screenshot shows the 'User' management interface. The 'General Information' section contains the following fields:

- Username:** john.scott
- Title:** Enter Title
- Password:** (masked with dots)
- First Name:** Enter First Name
- Email Id:** Enter valid email
- Manager:** Select Manager
- Last Name:** Enter Last Name
- Active:** Yes (selected) / No
- User Principal Name:** Enter the User Principal Name
- Role:** QAManager (highlighted with a red box)

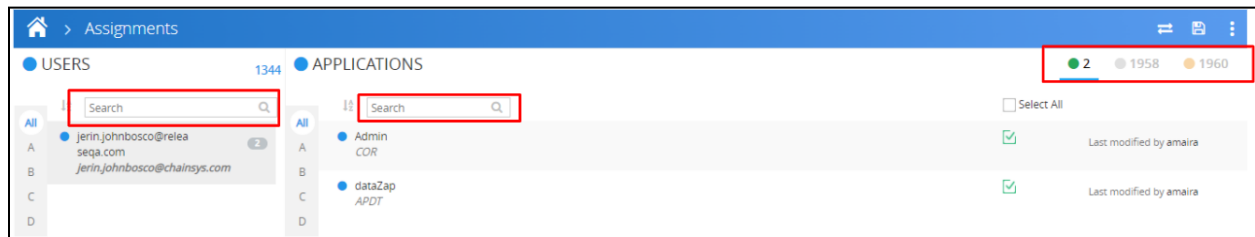
2. Click on the lookup field and select the role 'QAManager' .

Practice 3-13: Assigning Applications to User

In this practice, you will learn how to assign applications to users in dataZap.

1. Assigning applications enables a user to get access to the corresponding applications (dataZap, appMIGRATE, appVIZ, appMDM, etc.).

appADMIN-> Applications & Objects -> Assign Applications to User



2. Select the user '**john.scott**' (your username) from the left pane to assign applications.
3. Select **appADMIN**, **dataZap** applications from the right pane.
4. Click the **Save icon** to save the form.

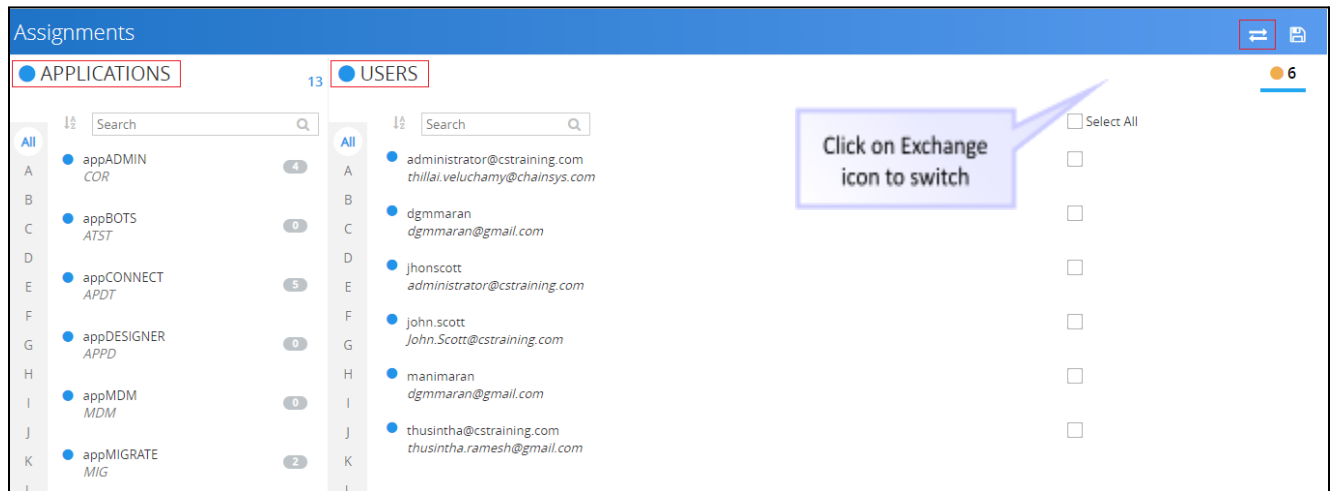
Practice 3-14: Assigning Users to Application

In this practice, you will learn how to assign users to an application in dataZap.

1. Assigning applications enables a user to get access to the corresponding applications (dataZap, appMIGRATE, appVIZ, appMDM, etc.).

appADMIN-> Applications & Objects -> Assign Applications to User

2. Click on the **Exchange** icon in the top right corner.



3. Select the application **appMDM** from the left pane to assign a user.
4. Select the user '**john.scott**' from the right pane.
5. Click the **Save icon** to save the form.