Delegated Admin Users

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In some situations, you may need to grant non-system admins access to the Exalate Admin Console without giving away system-wide admin permissions. This would allow you to delegate admin maintenance tasks, such as adding, editing, and deleting Exalate configurations, create connections for all projects in Jira on-Premise, Jira Cloud, Zendesk, Salesforce, ServiceNow, and Azure Devops. As a delegated admin you can view and manage **Errors**, **Sync Queue**, **Triggers**, **Clean-up**, and **Bulk Connect**.

While setting up delegated admin access varies from platform to platform (see below for specific instructions), in general the the delegated admin user must fulfil the following requirements:

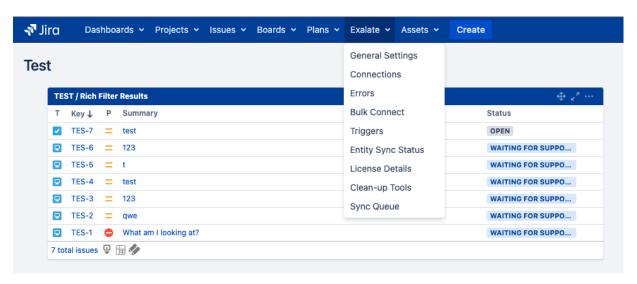
- be a member of the exalate_console_admin group
- be a project admin

Note: The system tracker admin must create the **exalate_console_admin** group.

Note: A project admin who is also a member of the exalate_console_admin. group cannot accept Public Basic and Visual connections which have been initiated from the remote side.

Jira On-Premise

For Jira On-Premise users who are in the Exalate console admin group but are not regular admins, the Exalate menu is found on the top menu bar:



Note: For Jira On-Premise the delegated admin user does not have to be a project admin.

Jira Cloud

1. Create the exalate_console_admin group

- 1.1. Go to your Jira settings by clicking on the settings cog in the bottom left corner, then select **System** from the menu.
- 1.2. Under User Management, select Groups.
- 1.3. Click on **Create group**.
- 1.4. Enter a name for your group, such as **exalate_console_admin**. You can also add a group description.
- 1.5. Click **Create** to create the group
- 1.6. Assign the permissions from the project settings

2. Add users to the group

- 2.1. Go back to the group management page (Settings > User management > Groups).
- 2.2. Find the **exalate_console_admin** group and click on it to open its details.
- 2.3. Click on Add users to group.
- 2.4. Search for and select the users you want to add to the group.
- 2.5. Click **Add** to add the selected users to the group.

Important: For **Jira Cloud**, delegated admins can only access Exalate through the **Project Settings** of the projects where they are admins. Clicking on **Apps > Exalate** does not load the Exalate panel since delegated admins do not have access to the Jira instance general settings page.

Note: the above instructions only work with a paid version of the Jira instance.

7endesk

In **Zendesk**, there are two ways to grant access to the Exalate admin console without granting full admin permissions:

- · Create a Custom Role to grant an agent limited permissions
- Use the agent role with minimal permissions (Contributor)

Important: The Exalate app should not have any roles and groups restrictions enabled on the app settings in order to provide access to all internal Zendesk users (team members).

Salesforce

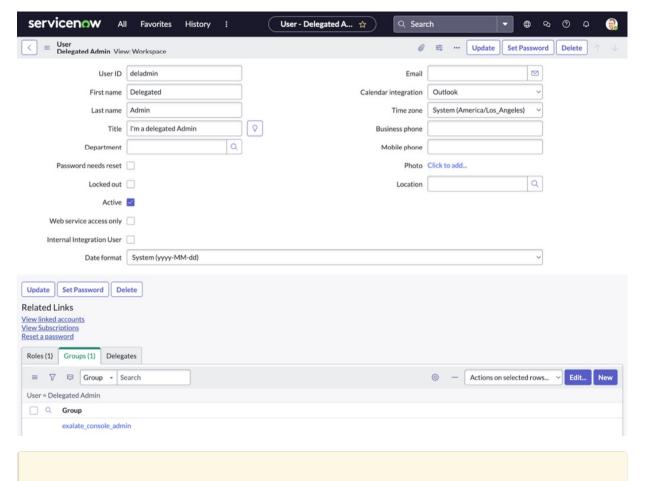
For **Salesforce**, it is possible to install the app for specific profiles and the system admin can configure a specific profile to access the app configuration.

ServiceNow

Create the user and user group.

To create a delegated admin user we need the following:

- 1. A basic user that is Active, with a set password
- 2. A user group called exalate_console_admin
- 3. Add the a user to the above group



Note: You need to uncheck the "Passwords needs reset" if the user is not be logged in to the ServiceNow interface.

Azure Devops

The requirements are the same for a delegated admin:

- be a member of the **exalate_console_admin** group
- · be a project admin

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