

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:

The screenshot shows the Jira On-Premise interface. The top navigation bar includes the Jira logo, a search bar, and several menu items: Dashboards, Projects, Issues, Boards, Plans, Exalate, Assets, and a Create button. The Exalate menu is open, displaying a list of options: General Settings, Connections, Errors, Bulk Connect, Triggers, Entity Sync Status, License Details, Clean-up Tools, and Sync Queue. Below the navigation bar, the main content area is titled 'Test' and contains a table of test results. The table has columns for 'T', 'Key', 'P', and 'Summary'. The data rows show various test results, including 'TES-7' with a status of 'test', 'TES-6' with a status of '123', and 'TES-1' with a status of 'What am I looking at?'. A summary row at the bottom indicates '7 total issues'.

T	Key	P	Summary
✓	TES-7	=	test
✓	TES-6	=	123
✓	TES-5	=	t
✓	TES-4	=	test
✓	TES-3	=	123
✓	TES-2	=	qwe
✓	TES-1	=	What am I looking at?
7 total issues			

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.

Zendesk

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

The screenshot shows the ServiceNow User Admin interface for a user named 'Delegated Admin'. The user ID is 'deladmin'. The first name is 'Delegated' and the last name is 'Admin'. The title is 'I'm a delegated Admin'. The department is empty. The password needs reset checkbox is unchecked. The locked out checkbox is unchecked. The active checkbox is checked. The web service access only checkbox is unchecked. The internal integration user checkbox is unchecked. The date format is set to 'System (yyyy-MM-dd)'. The email field is empty. The calendar integration is set to 'Outlook'. The time zone is set to 'System (America/Los_Angeles)'. The business phone and mobile phone fields are empty. The photo field has a 'Click to add...' link. The location field is empty. Below the user details, there are buttons for 'Update', 'Set Password', and 'Delete'. Under 'Related Links', there are links for 'View linked accounts', 'View Subscriptions', and 'Reset a password'. At the bottom, there is a table with tabs for 'Roles (1)', 'Groups (1)', and 'Delegates'. The 'Groups (1)' tab is selected, showing a table with one row: 'exalate_console_admin'.

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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