UltraAnalytics

v1.1

Ultragenic Research & Technologies

Admin Manual

UAN-UM-UG-002

01.00

Table of Contents

Document History

Version	Modification Date	Author	Summary of Changes
01.00	10-Feb-2023	Shubh	Initial Document

Approval Statement

PREPARED BY:				
Role	Title Department	Name	Signature	Date
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APPROVED BY:				
By affixing their signatures, the individuals below acknowledge that they have reviewed and approved the scope of the effort described in this Admin Manual for the UltraAnalytics Portal. The signature below represents the approval for the use of this Admin Manual and acceptance by Ultragenic.				
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1. Introduction

1.1 Purpose

The purpose of this Admin Manual is to describe the features of the UltraAnalytics system.

1.2 Objectives

The objective of this Admin Manual is to provide instructions to a user for using the following features.

- Dashboard
- Site management
- Client management
- Client Admin management
- Role management
- User management
- Reports
- Audit logs
- App Settings

2. Roles and Definitions

<u>Types of Roles:</u>

Admin Roles:

Super Admin:

Super admin will be Ultragenic main Admin who has access to the whole application part including all clients reporting admin permissions. Super admin can create sites, clients and client admins who are responsible for the assigned clients only.

Client Admin:

Client admin has all the same privileges as super admin but for the assigned clients only. Client admin cannot manage any other client admins data. Client Admin can create roles for clients and assign those roles by creating users of client.

User Roles:

Managed reports access:

Managed report access is assigned to users to get access to the Managed reports folder on reporting server.

Self Service reports access:

Self Service report access is assigned to users to get access on self-service reports folder on reporting server.

OOB reports access:

OOB report access is assigned to users to get access on OOB reports folder on reporting server.

Support access:

Support access is assigned to users to get access on Managed reports, Self Service reports & OOB reports folder on reporting server.

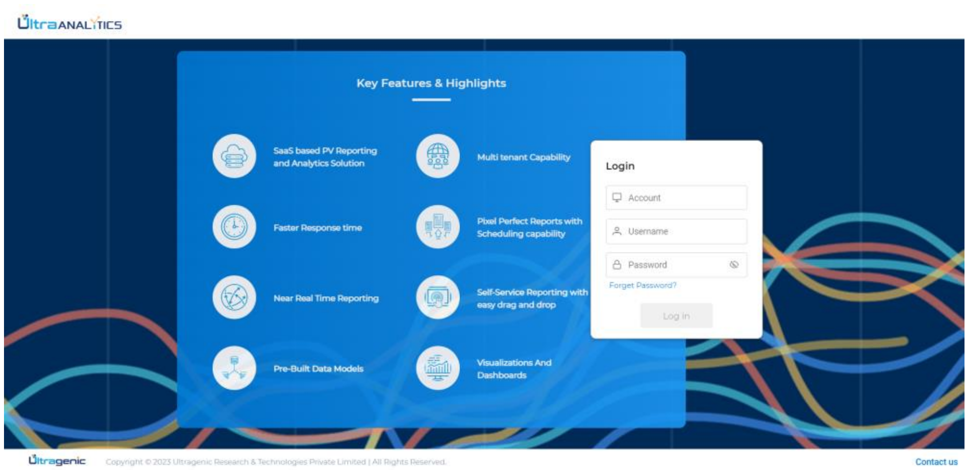
3. Login Instructions

1. Open any compatible browser and in app stream URL and press enter.
2. Open the UAN web application which will redirect you to the login page of application. Following are the compatible browsers-

    - Google Chrome (Version 98 or later)
    - Internet Explorer (Version 11 or later)
    - Mozilla (Version 91 and later)

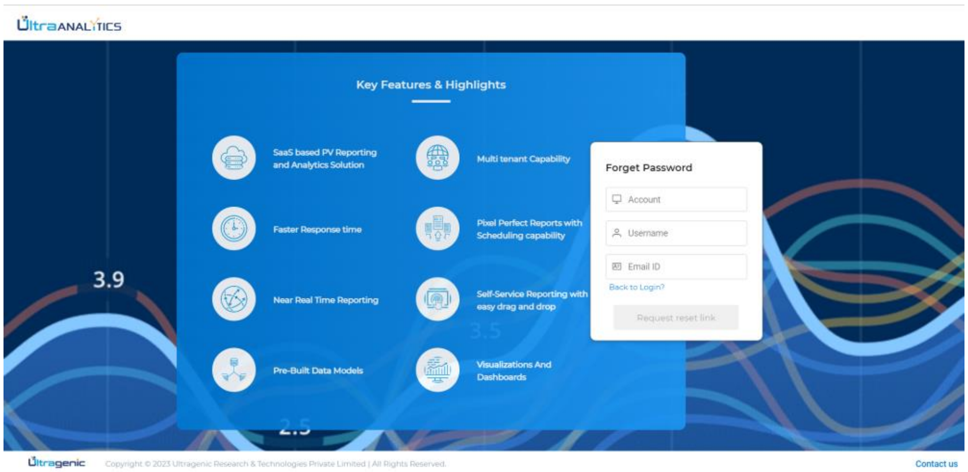
3. Admin will enter **Account**, **Username** and **Password.**

    Account Name is the client's name that the admin belongs to. For internal users, Account name is "UG".

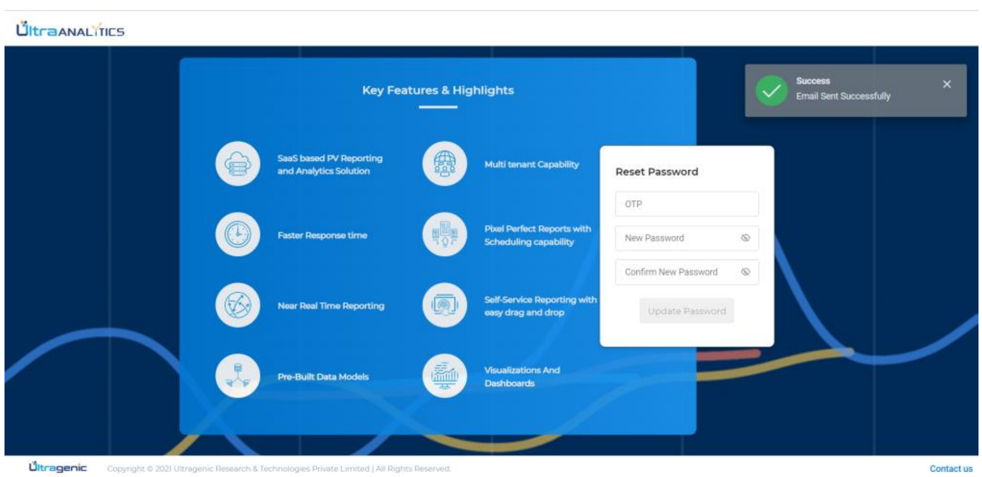


4. Click on **Log in**.

5. To reset the password, click on **Forgot password**. The following screen will appear.



6. Enter the account name, username and registered email ID of the admin and click on the **Request reset link** button. The following message will appear

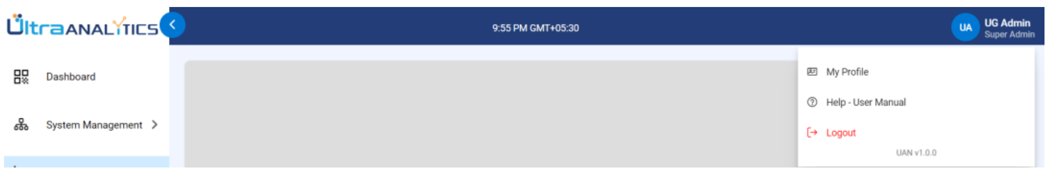


7. Enter the OTP you received in the email with the new password to update your password.

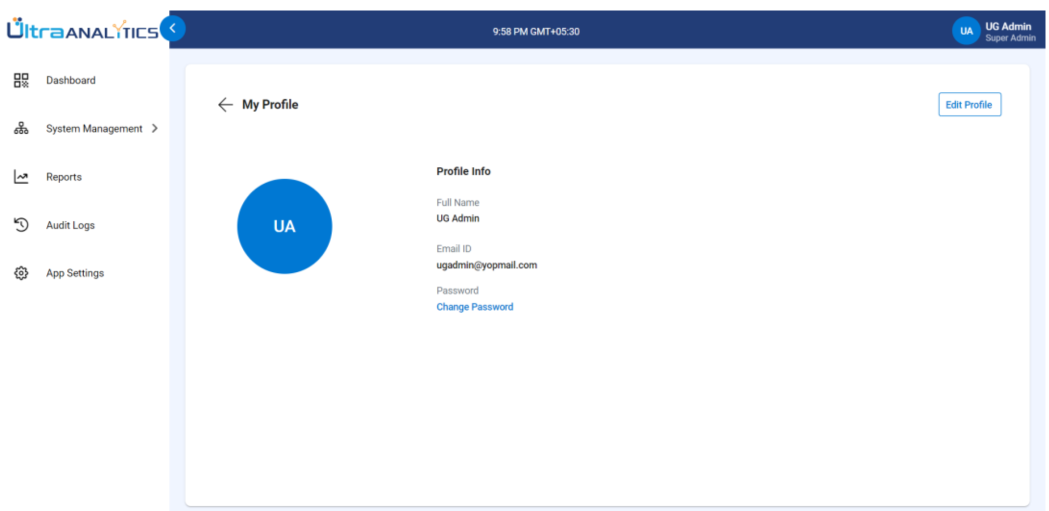
8. Enter the new password & confirm password. Click on the **Update password** button.

3.1 My Profile

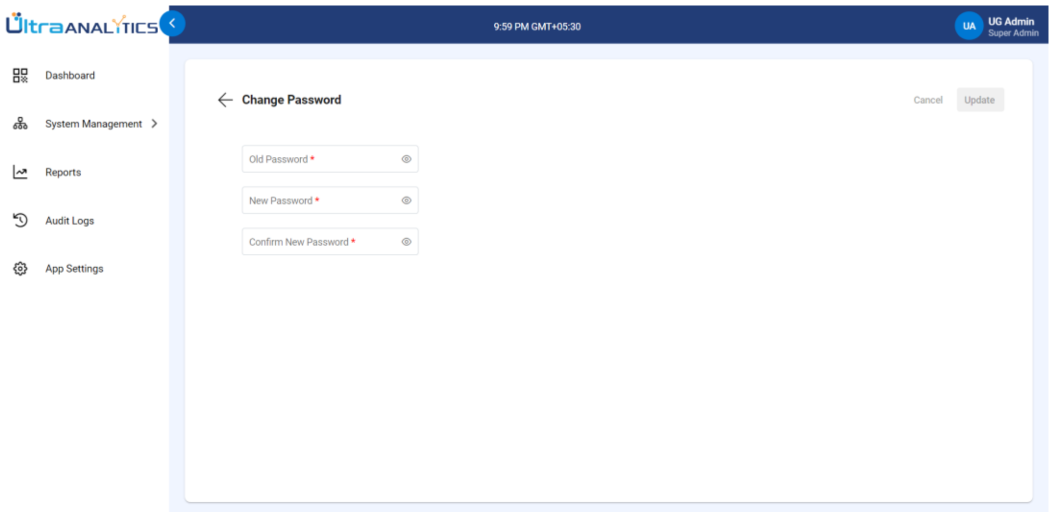
1. **Logged-in User (My Profile):** The name of the logged-in user will be displayed along with their role. The user's initial will also be displayed. Once the user clicks on the username, **My Profile** and **Log out** options will appear. Admins can manage their profile information using the **My Profile** option. If the admin wants to **logout**, click on the **logout** option.



If the admin clicks on **My Profile**, the following screen will appear with the admins' profile information.



If the admin wants to change the password, click on **Change password**. The following page will appear.

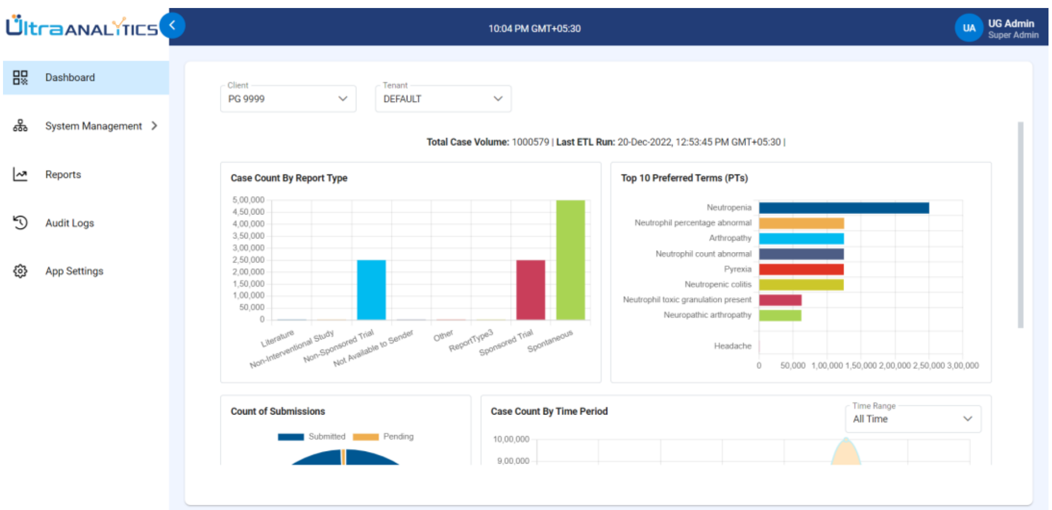


Enter the old password, new password, and confirm the password. Click on **Update** button. The password change success message will appear.

4. Dashboard

Dashboard will have the following information on the page.

- Total case volume
- Last ETL run
- Case Count by report type
- Top 10 preferred terms (PTs)
- Count of submissions
- Case count by time-period

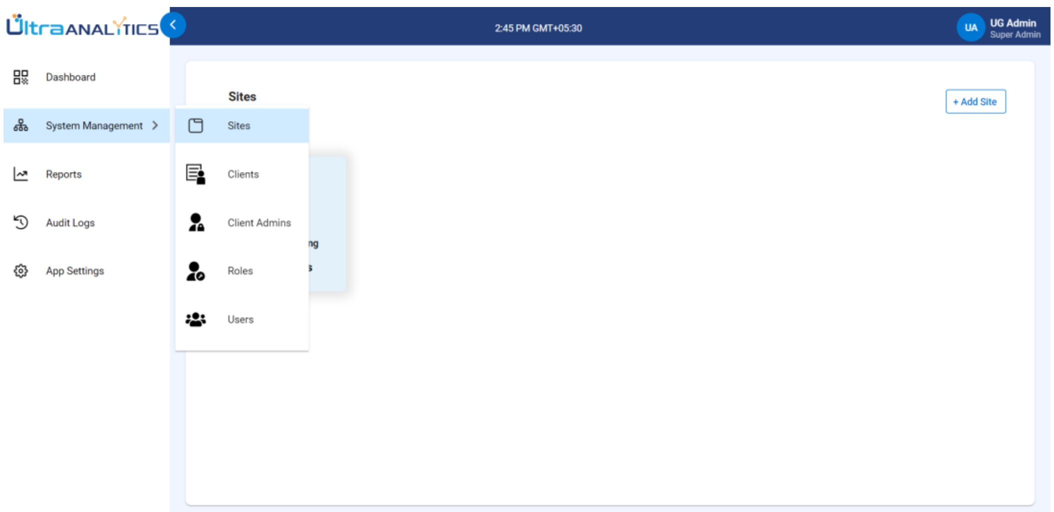


- Admin can see consolidated information on the dashboard.
- Admin can filter information based on client & tenant assigned.

5. System Management

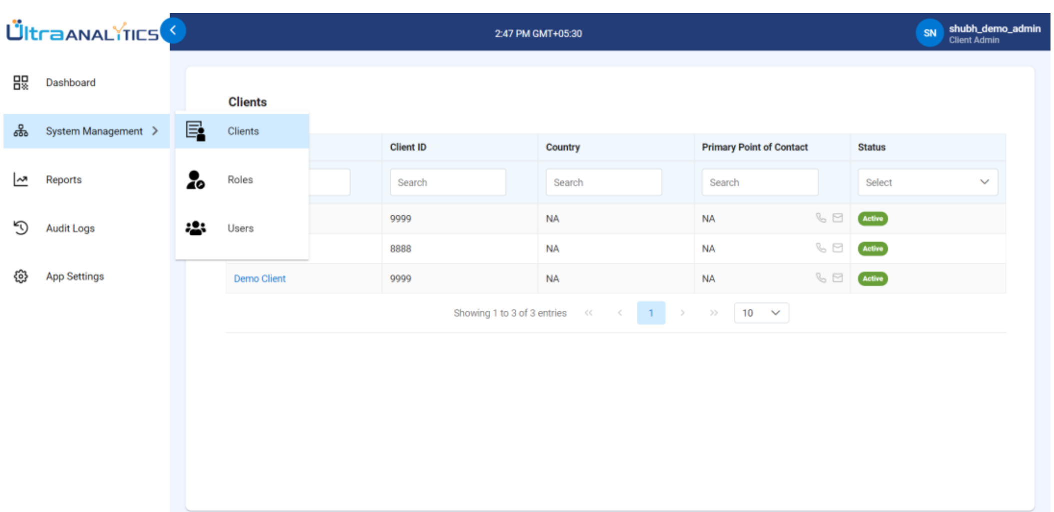
For Super Admin: -

System Management consists of Sites, Clients, Client Admins, Roles, and Users.



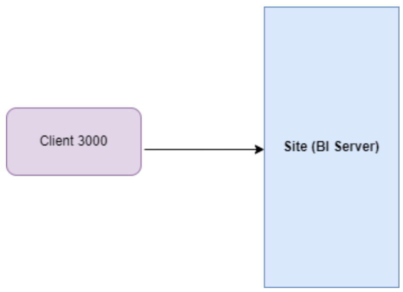
For Client Admin: -

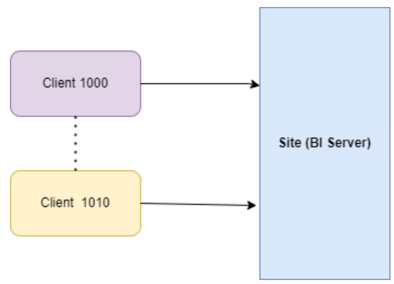
System Management consists of clients, Roles, and Users.



5.1 Sites

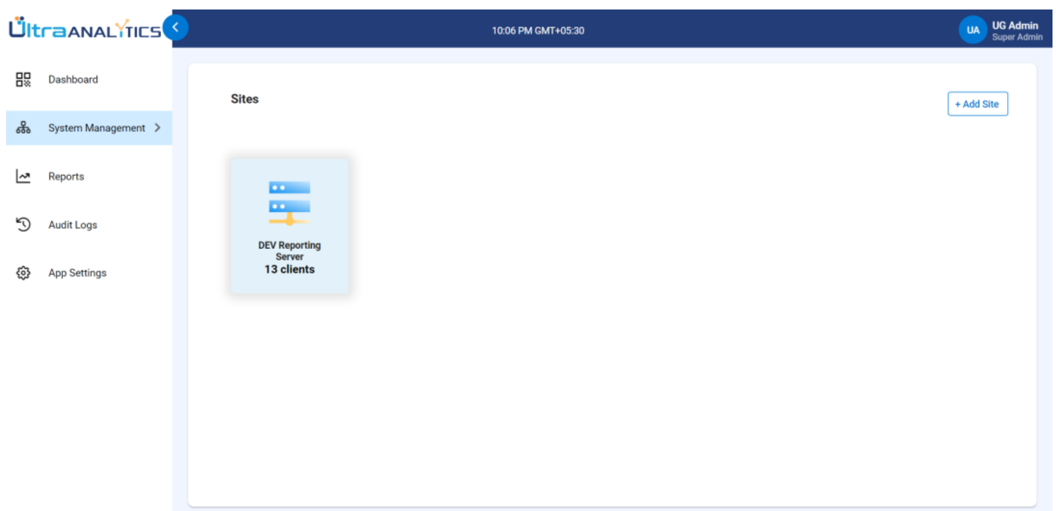
Super Admin can add/edit/delete a site. Super admin can add one or more than one client on a site. Client Admin doesn't have access to the Sites.





One client with one Server

More than one client with one BI server

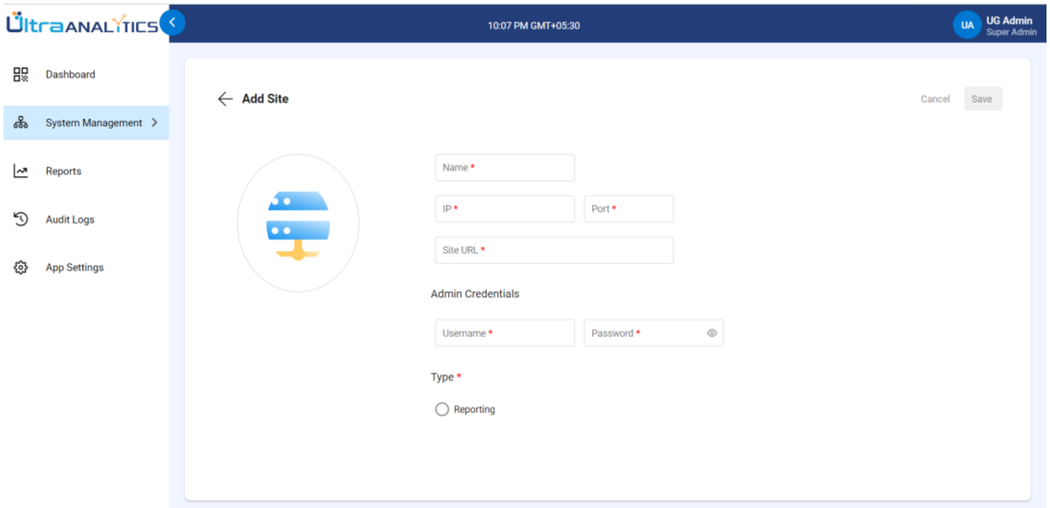


<u>**Pre-Requisite for adding a site:**</u>

The infrastructure required must be provisioned before configuring the portal.

<u>**Process to add a Site: (by Super Admin only)**</u>

1. From the main navigation, click on the Site. Admin will be redirected to the Site page where it will contain all the Sites.
2. Click on the **Add Site** button. The following page will appear.



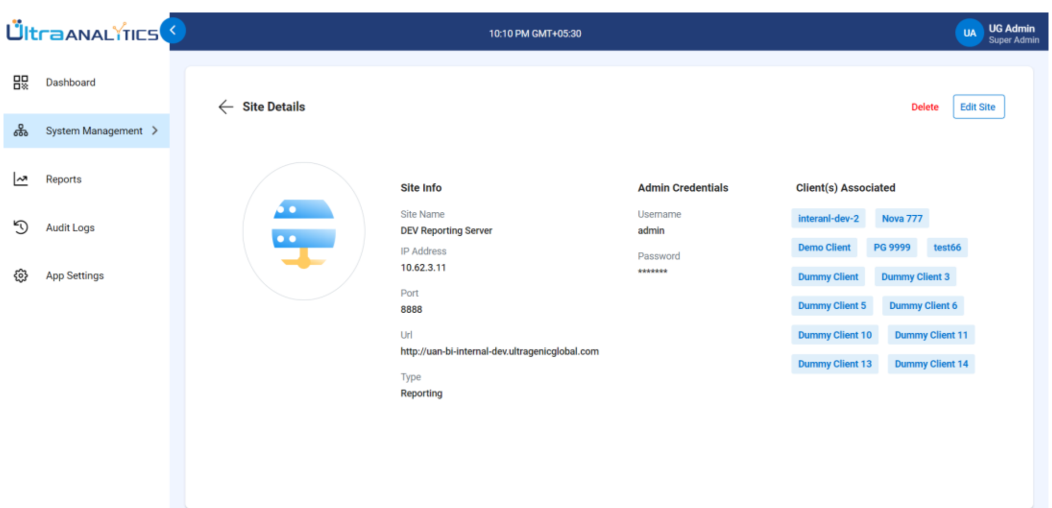
3. Enter the required details and click on **Save**.

<u>Process to delete a Site: (by Super Admin only)</u>

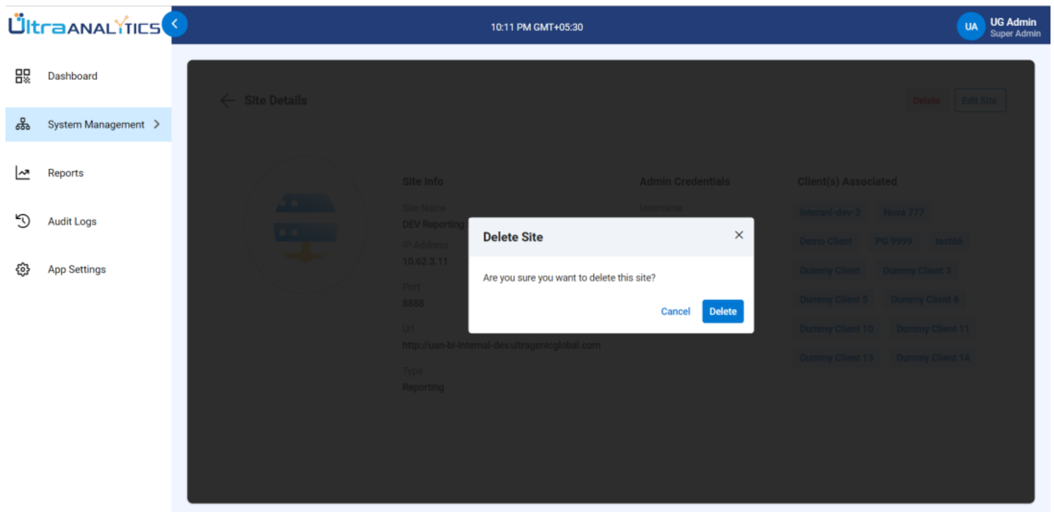
<u>Pre-Requisite for deleting a Site:</u>

No Clients should be associated with the Site.

1. From the main navigation, click on the Site. Admin will be redirected to the Site page where it will contain all the Sites.
2. Click on the Site to open the details. The following screen will appear.



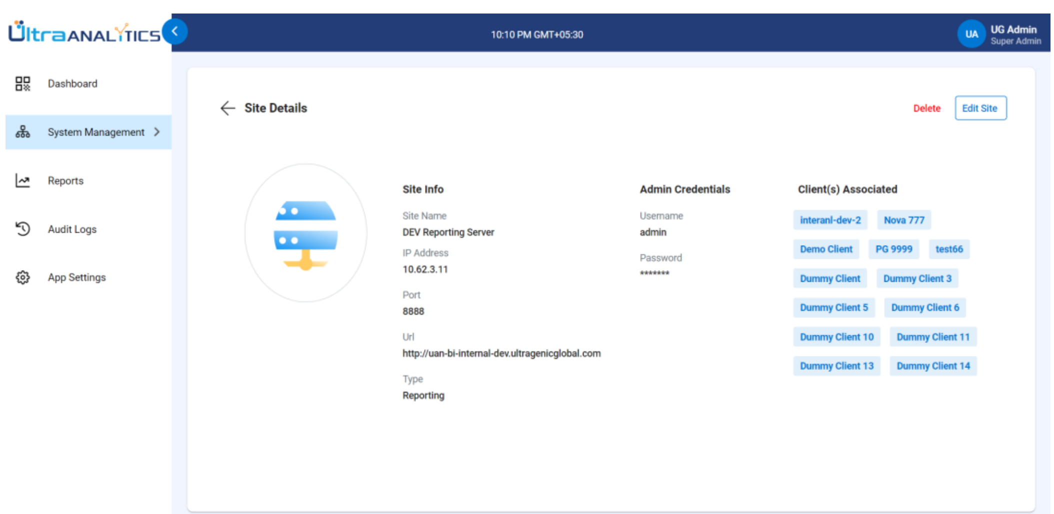
3. Click on the **Delete** button to remove a Site. Before removing, a pop-up confirmation page will appear. Click on **Delete** button to remove the Site.



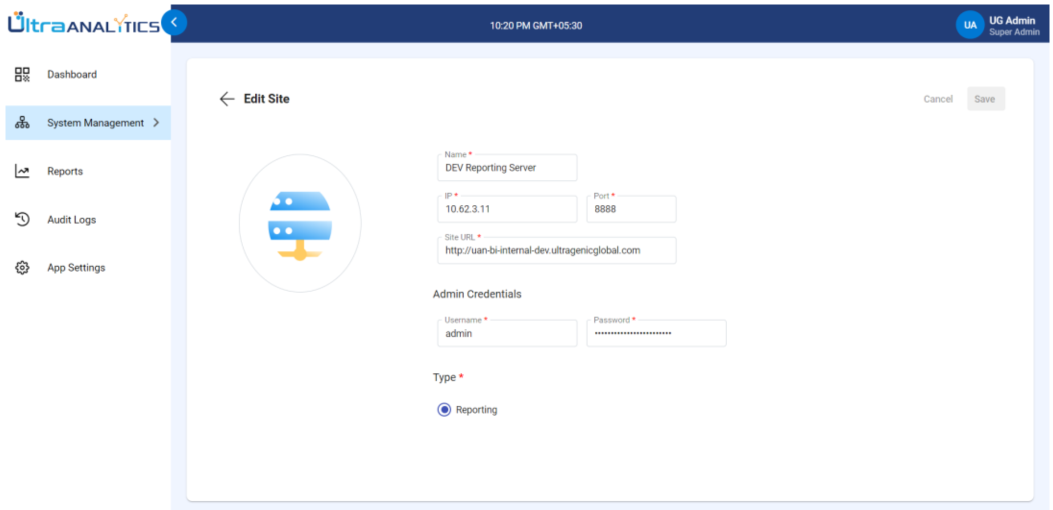
4. Once deleted, a successful pop-up delete message will be displayed.

Process to edit a Site: (by Super Admin only)

1. From the main navigation, click on the Site. Admin will be redirected to Site page where it will contain all the Sites.
2. Click on the desired site. The following screen will appear.



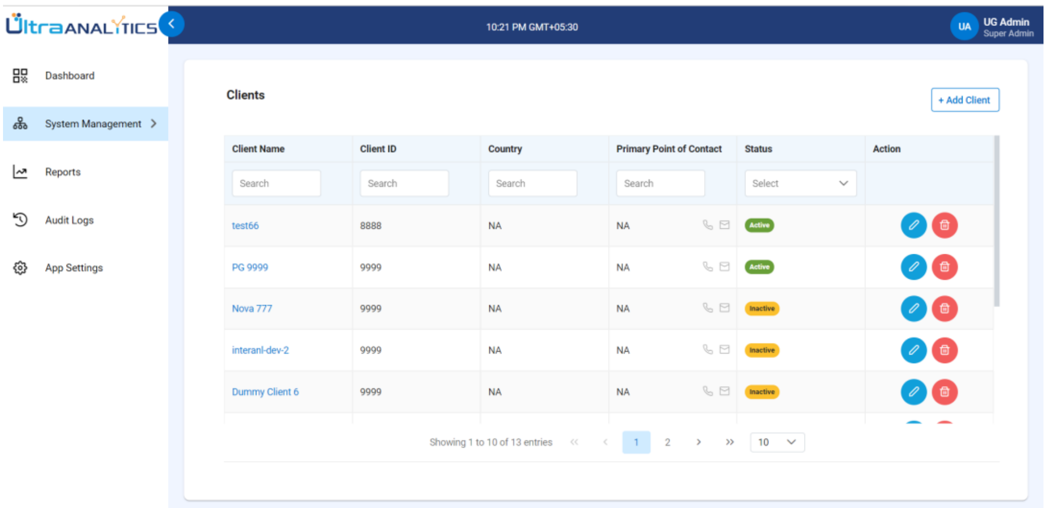
3. Click on the **Edit** button to modify any site's details. The following screen will appear.



4. Modify the details and click on **Save** to update the changes.

5.2 Clients

Super Admin can add/view/edit/delete clients.
Client Admin can only view the clients assigned.



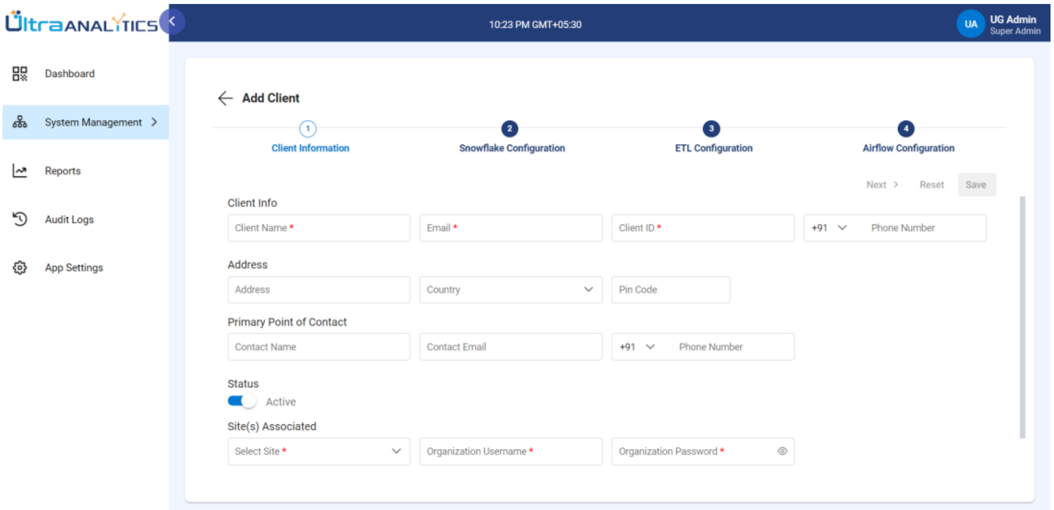
<u>Pre-Requisite for adding client:</u>

All given below configuration and installation have been done before adding the client.

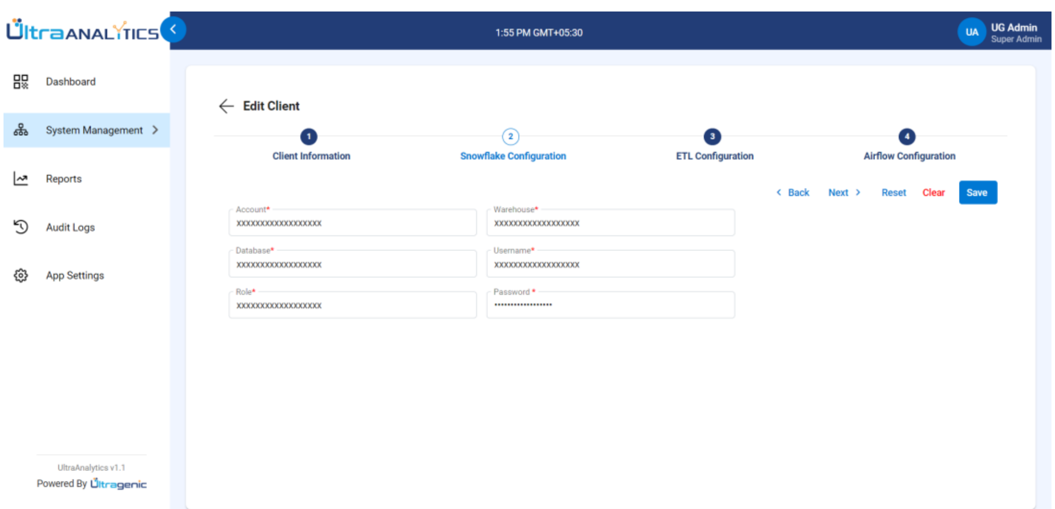
1. Data Warehouse must be configured on Snowflake or Postgres.
2. Airflow environment must be configured.

<u>Process to add client: (by Super Admin only)</u>

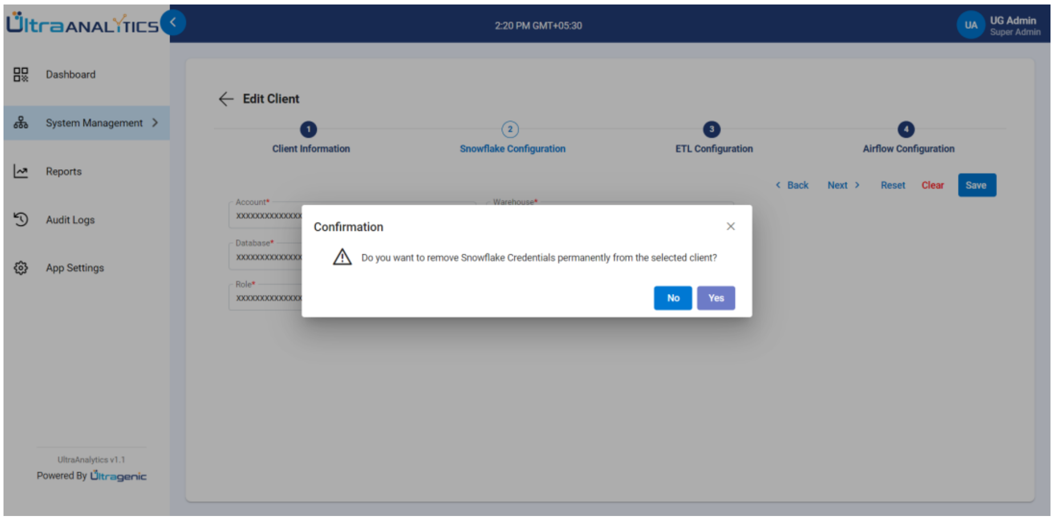
1. From the main navigation, click on the Clients. Admin will be redirected to Client page where it will contain all the Clients.
2. Click the **Add client** button. The following screen will appear.



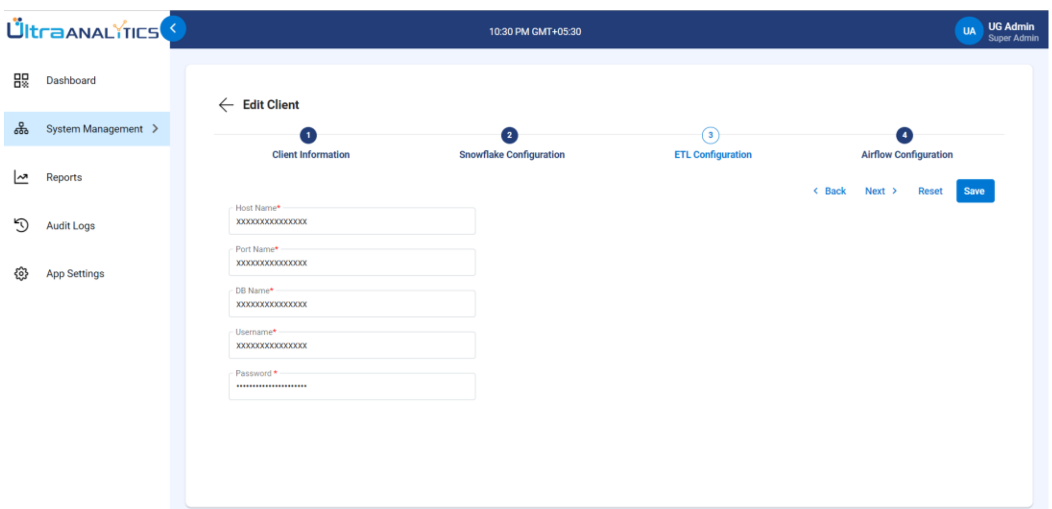
3. Under the **Client Information** step, enter the required information of a client.
4. Create an organization with the same name of client name, and tick the checkbox.
5. Click on Save button, and your client created successfully. Now further configurations can be added.
6. **Go to Snowflake Congifuration** step by Next button, if snowflake used as a data warehouse, enter required information and click on **Save** button. Else skip this step using Next button.



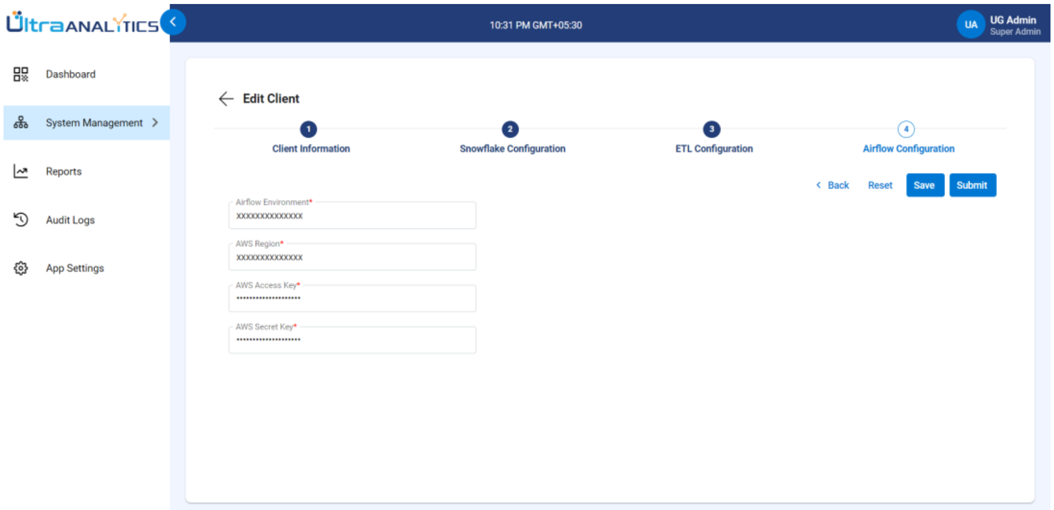
7. To remove existing snowflake configuration credentials, go **to Snowflake Configuration** step. Click on Clear button. Confirmation popup appears, click on Yes.



8. Go to **ETL Configuration** step and fill the required information, ETL Configuration will be used as a data warehouse if snowflake configuration is not set. Click on **Save** button.



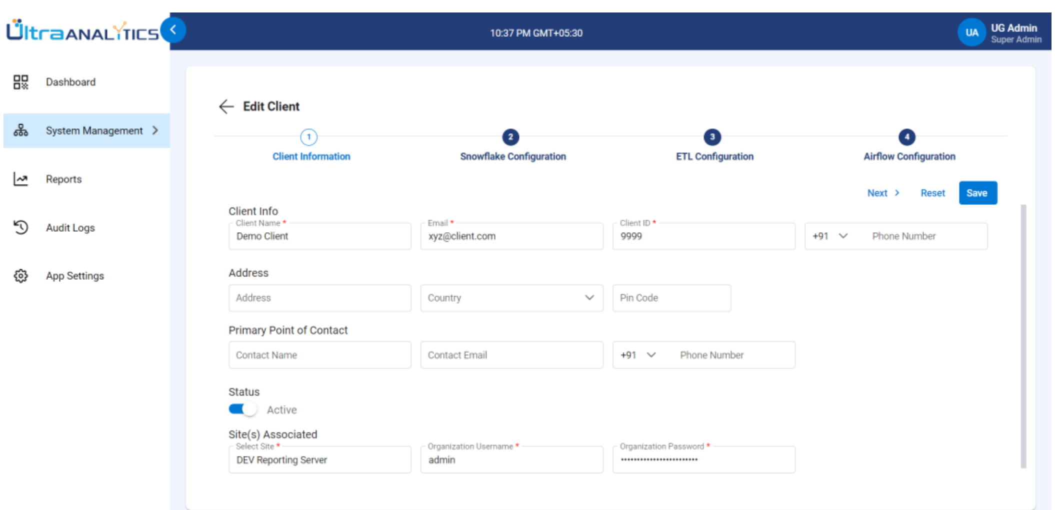
9. Go to the **Airflow Configuration** step and enter the Airflow details. Click on **Save**.



10. Client will be added on successful validation of details, and can be checked on the Client's table in the Client page.

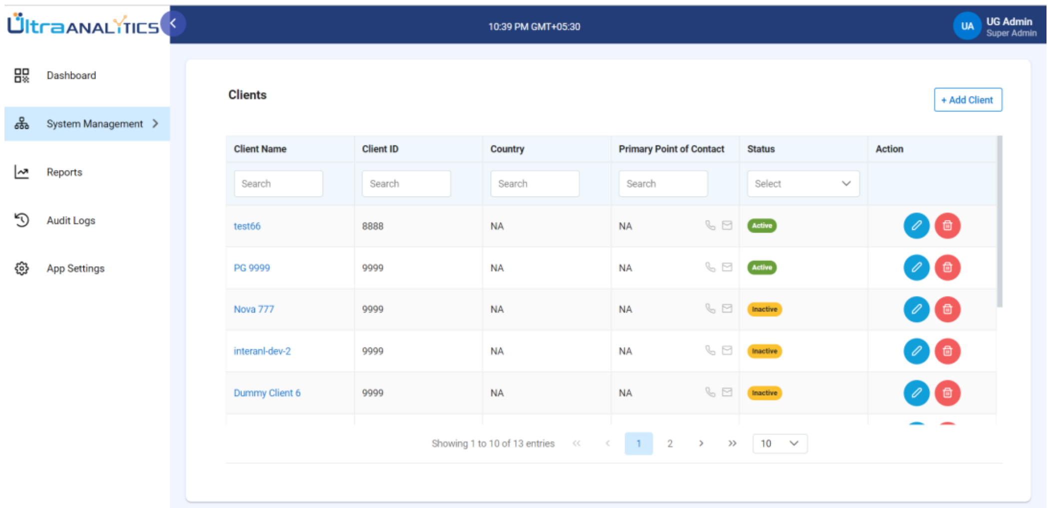
<u>Process to edit Client: (by Super Admin only)</u>

1. From the main navigation, click on the Clients. Users will be redirected to Client's page where it will contain all the Clients.
2. Click on the desired Client.
3. Click on **Edit** button. The following page will appear.



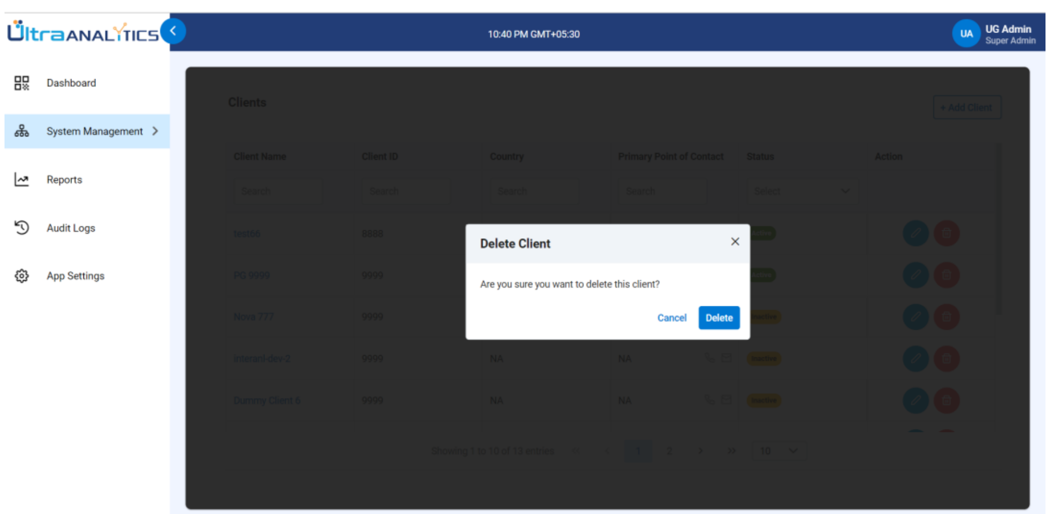
4. Update the required information in the **Client Information**, **Snowflake Configuration**, **ETL Configuration**, and **Airflow Configuration** steps.

Once client is saved, it will appear under **Clients** main page listing. Admin can view all the client's listing in different rows. Under **Actions** column, user can **Edit** and **Delete** any client.



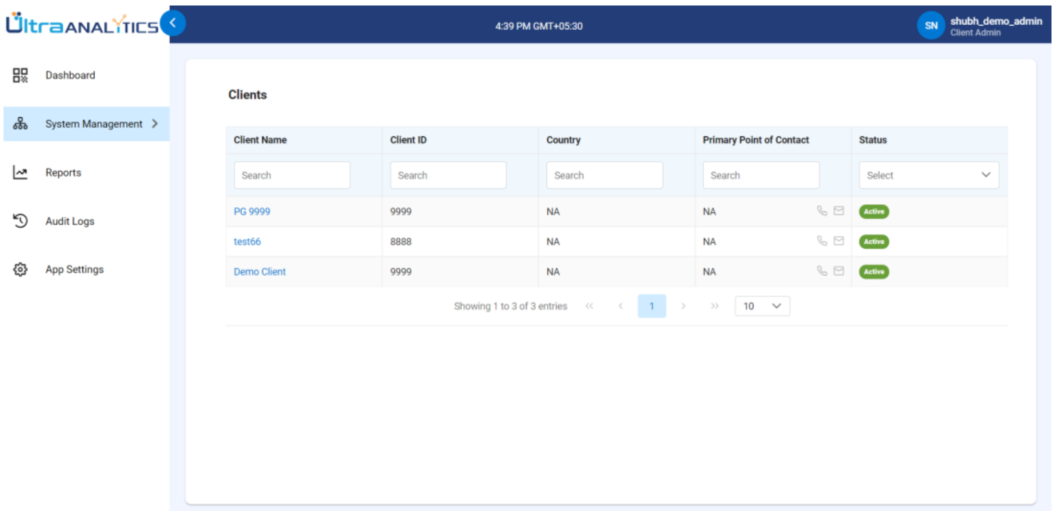
<u>Process to delete Client: (by Super Admin only)</u>

1. From the main navigation, click on the Clients. Admin will be redirected to Client page where it will contain all the Clients.
2. Click on the desired Client name or go to Action column corresponding to that client.
3. Click on **Delete** button, or **trash** icon button (from Action column) to remove a client. The following confirmation pop-up will appear. Click on **Delete** button to remove the client.



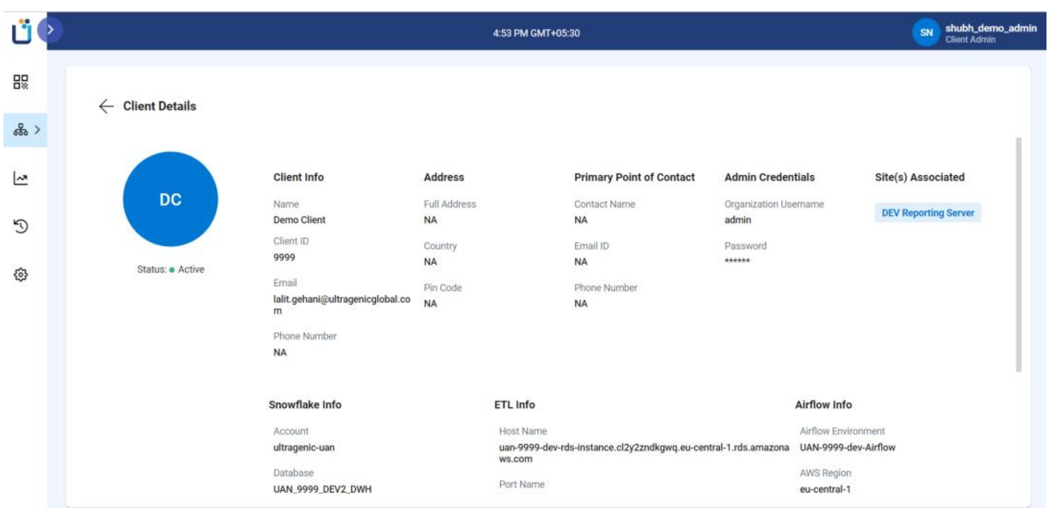
4. Once deleted, a success message will appear.

Client Admin have access to the clients assigned, and can only view the information associated with those client.



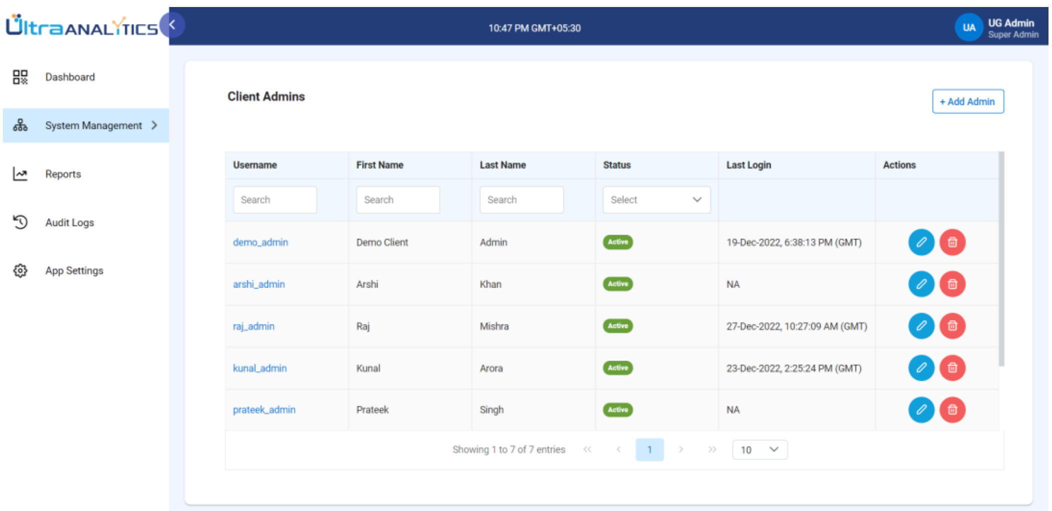
Process to view Client details: (by Super Admin or Client Admin)

1. From the main navigation, click on the Clients. Admin will be redirected to Client page where it will contain all the Clients.
2. Click on the desired Client name.



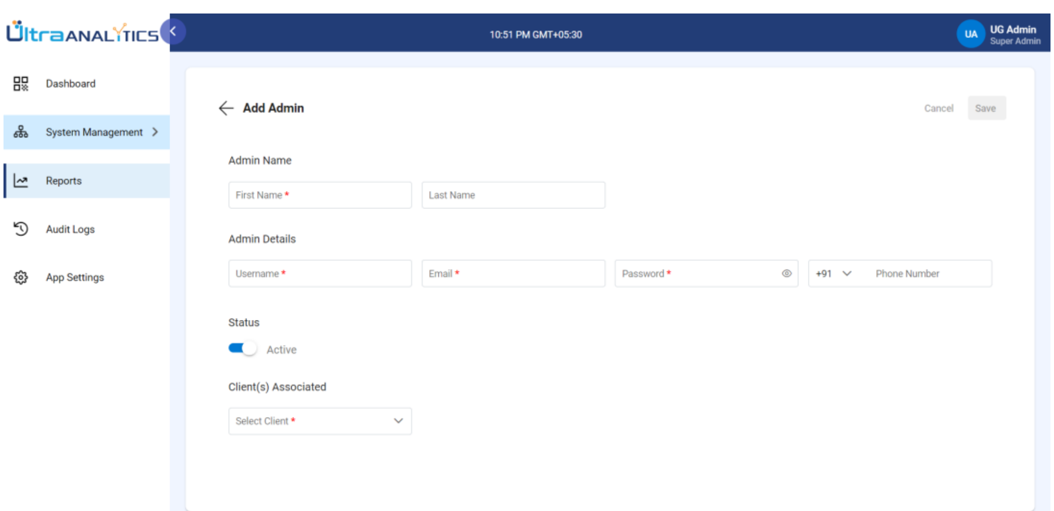
5.3 Client Admins

Super Admin can add/edit/delete the client Admin.
Client Admin doesn't have access to this section.

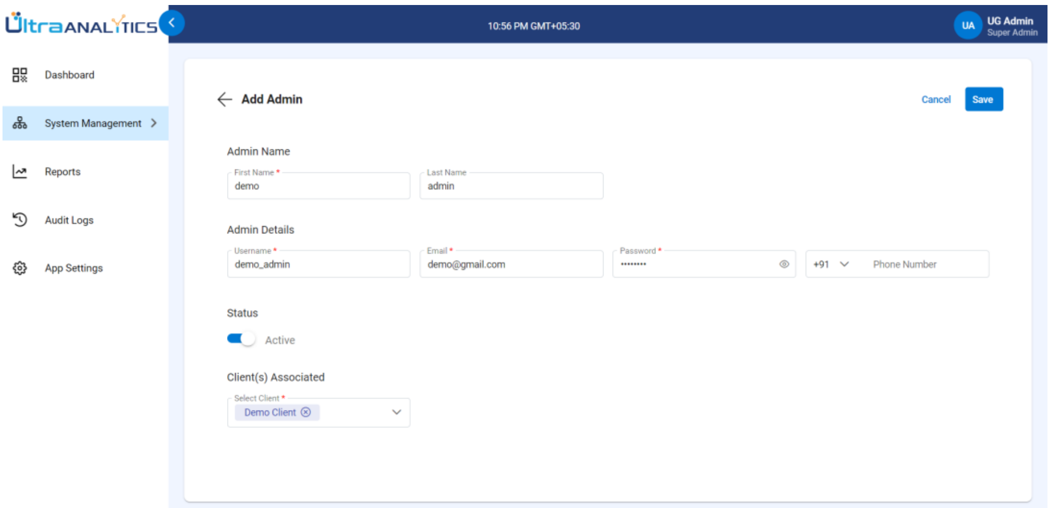


<u>Process to Add a Client Admin: (by Super Admin only)</u>

1. From the main navigation, click on the Client Admins. Admin will be redirected to Client Admin page where it will contain all the Client Admins.
2. Click the **Add client admin** button. The following screen will appear.



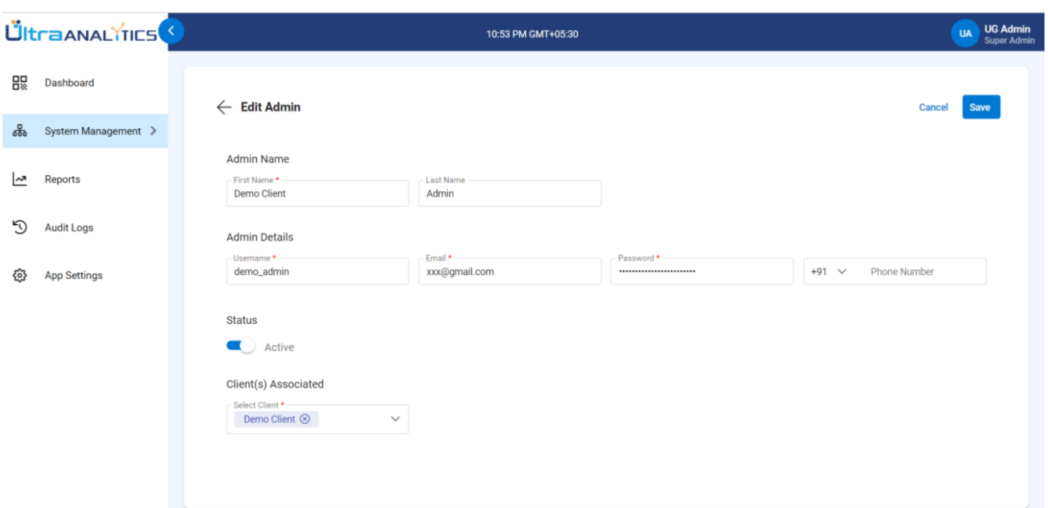
3. Fill the required information of a client admin. An Admin can be assigned to more than one clients. Use the **Client(s) associated** drop down to add clients.



4. Click on **Save**.
5. Client Admin will be added.

<u>Process to edit an Admin: (by Super Admin only)</u>

1. From the main navigation, click on the Client Admins. Admin will be redirected to Admin page where it will contain all the Client Admins.
2. Click on the desired Client Admin.
3. Click on **Edit** button. The following page will appear.

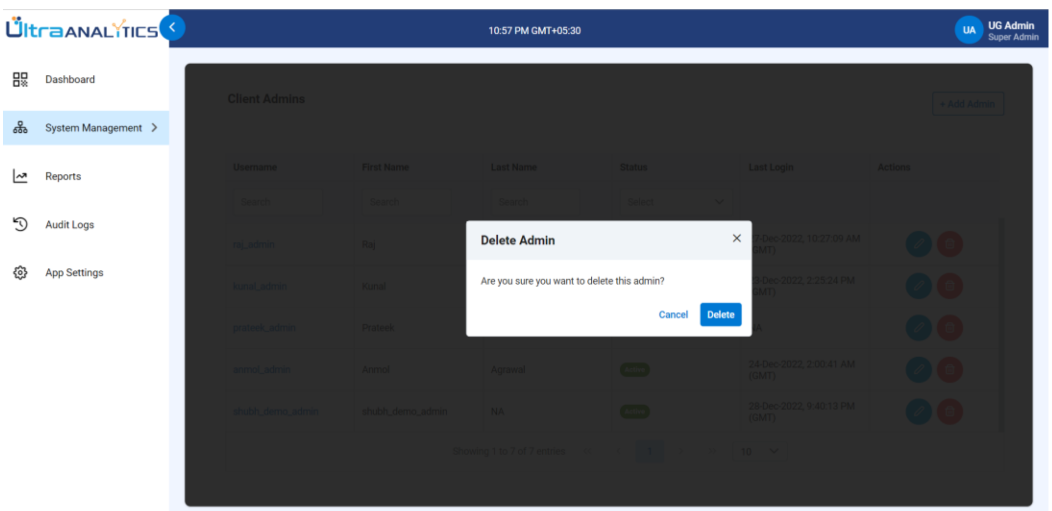


4. Update the required information and click **Save**.

Once Admin is saved, it will appear under **Admins** main page listing. User can view all the Client Admin's listing in different columns.

<u>Process to delete Client Admin: (by Super Admin only)</u>

1. From the main navigation, click on the Client Admins. Admin will be redirected to Client Admin page where it will contain all the Client Admins.
2. Click on the desired Client Admin's name or go to Action column corresponding to that Client Admin.
3. Click on **Delete** button, or **trash** icon button (from Action column) to remove a client. The following confirmation pop-up will appear. Click on **Delete** button to remove the client.



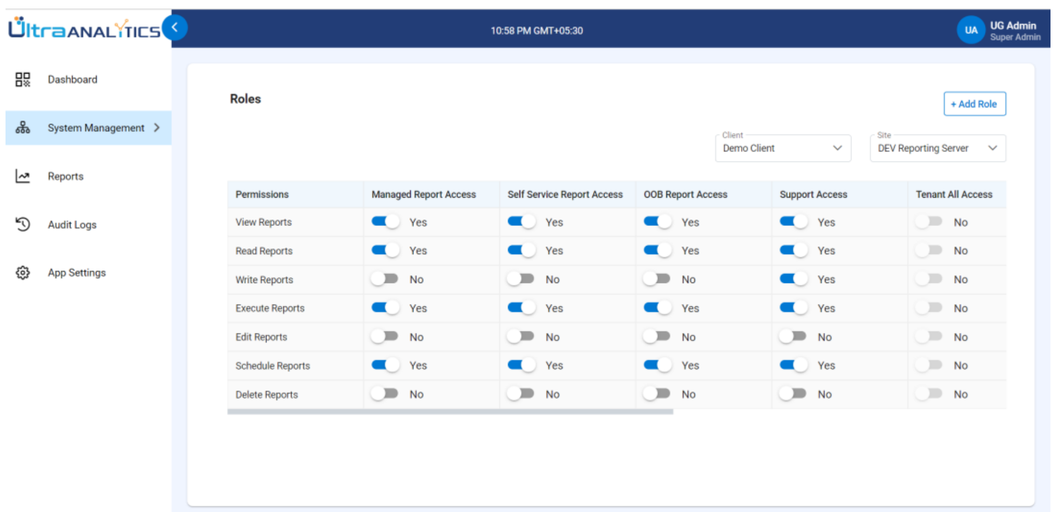
4. Once deleted, a success message will appear.

5.4 Roles

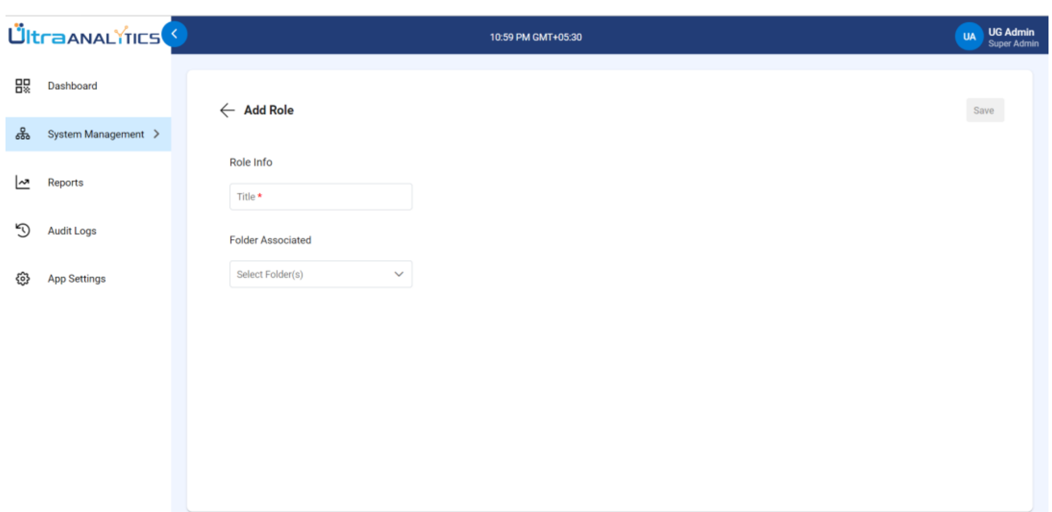
Roles section helps admin to assign different permissions to the client user(s) & support user(s). This section is accessible to both Super Admin and Client Admin.

<u>Process to add role: (by Super Admin or Client Admin)</u>

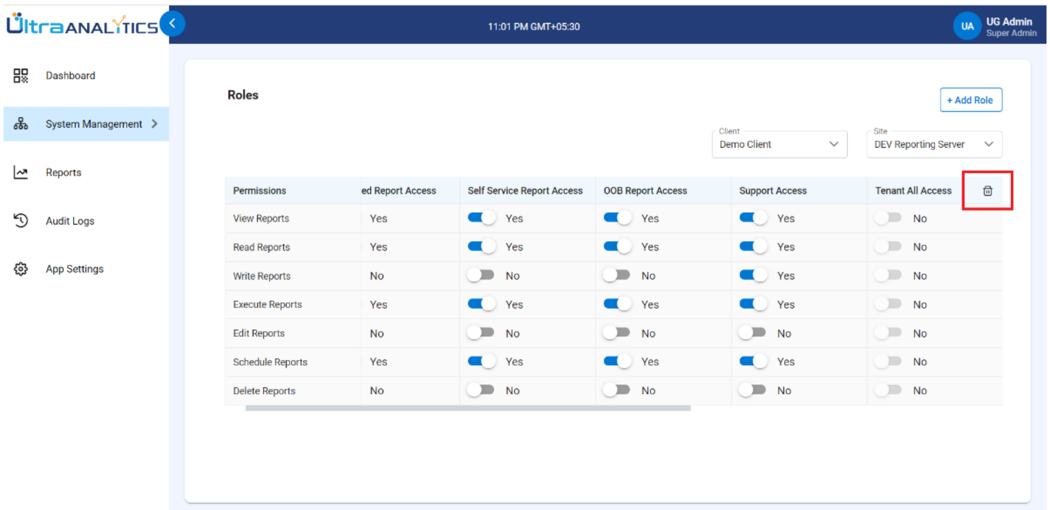
1. From the main navigation, click on the Roles. Admin will be redirected to Role page where it will contain all the Roles.
2. To add a new role, click **Add role** button.



3. The following screen will appear. Enter the role name and select the folder type from the drop-down. Click on **Add role** button.

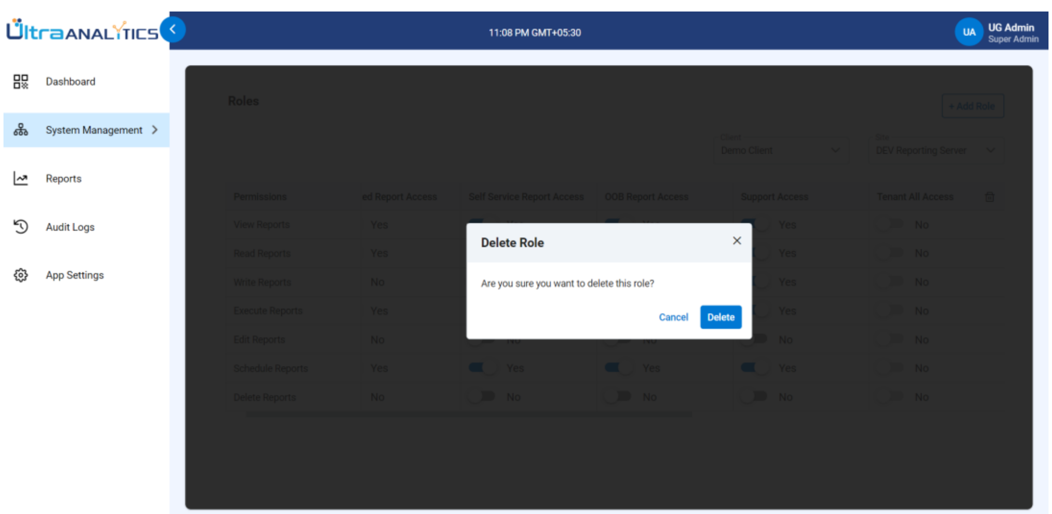


4. The following screen will appear with the new new role added (e.g. Tenant All Access).



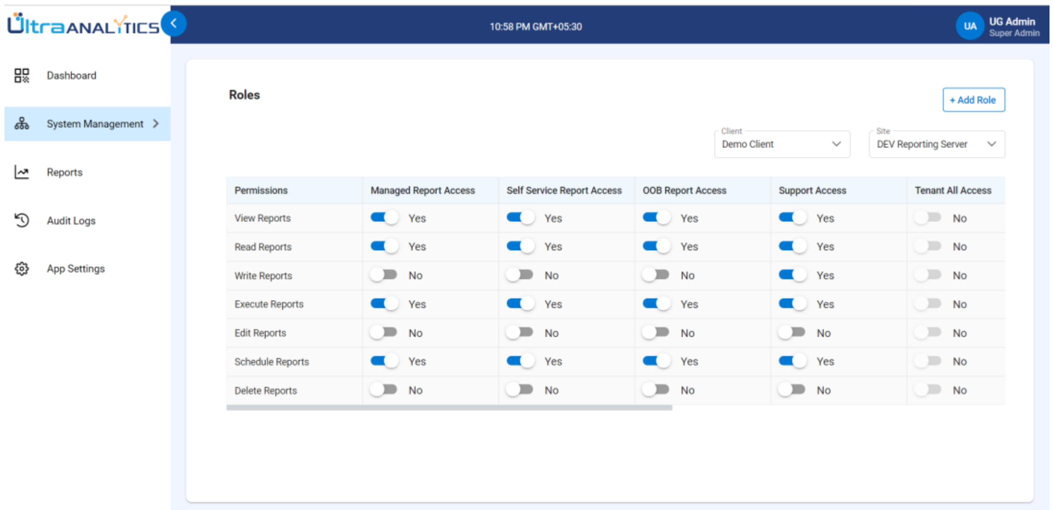
Process to add role: (by Super Admin or Client Admin)

1. User can delete a role by using the trash icon against the role. Click on the Trash icon. The following screen will appear. Click on **Delete** button to remove the role.



2. A successful role deleted message will pop-up.

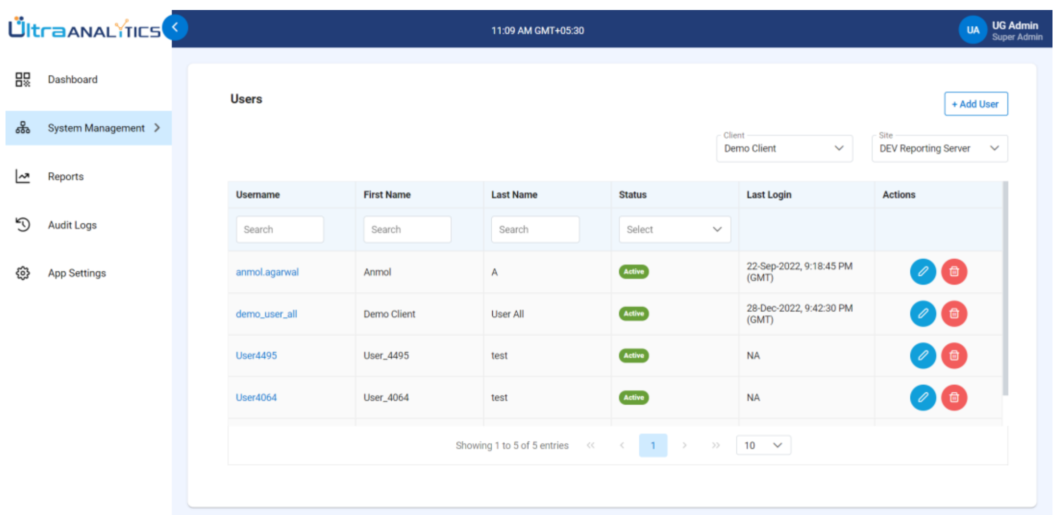
3. Admin can select client & site and enable/disable reporting permissions to roles assigned to the client.



5.5 Users

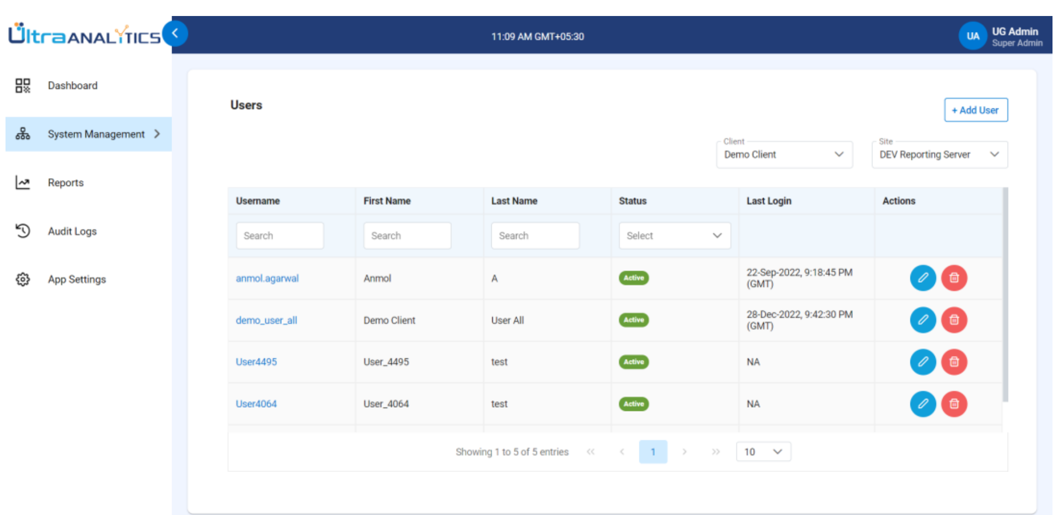
Super Admin/ Client Admin can create client user(s) and support user(s).

All the users' lists will be displayed on the **Users** main page as a listing. Admin can **Edit** and **Delete** any user from the listing page directly. This section is accessible to both Super Admin and Client Admin.

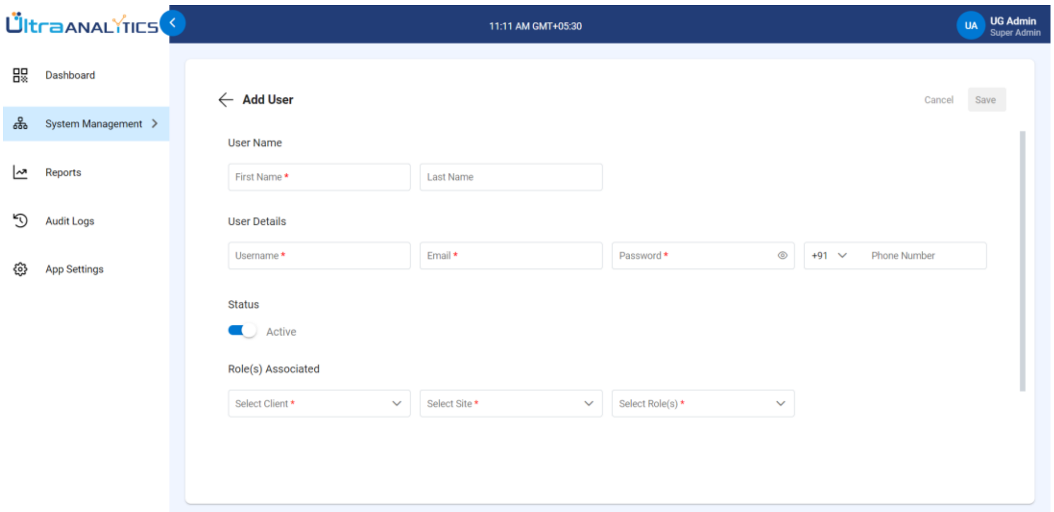


<u>Process to Add a User: (by Super Admin or Client Admin)</u>

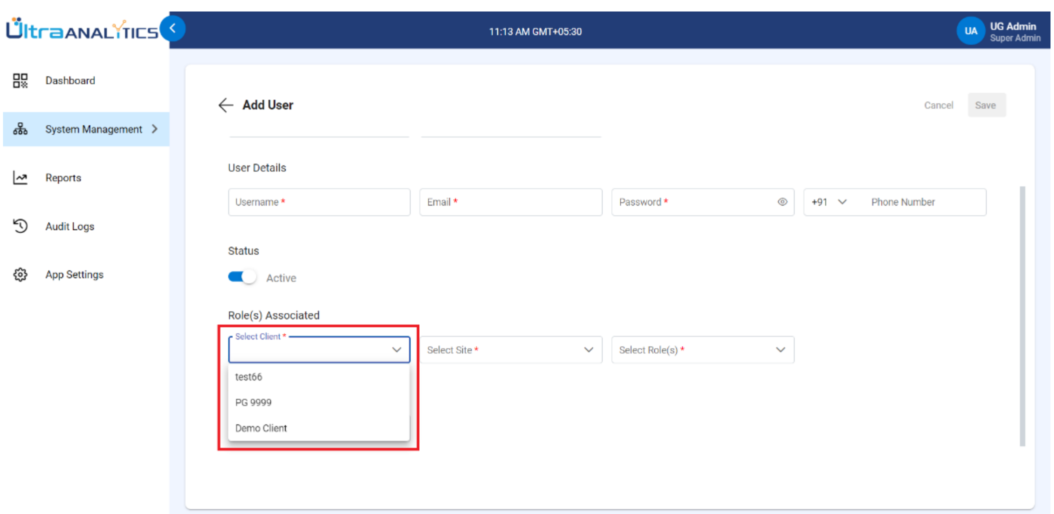
1. From the main navigation, click on the Users. Admin will be redirected to user page where it will contain all the client users & support users.
2. Click the **Add User** button.



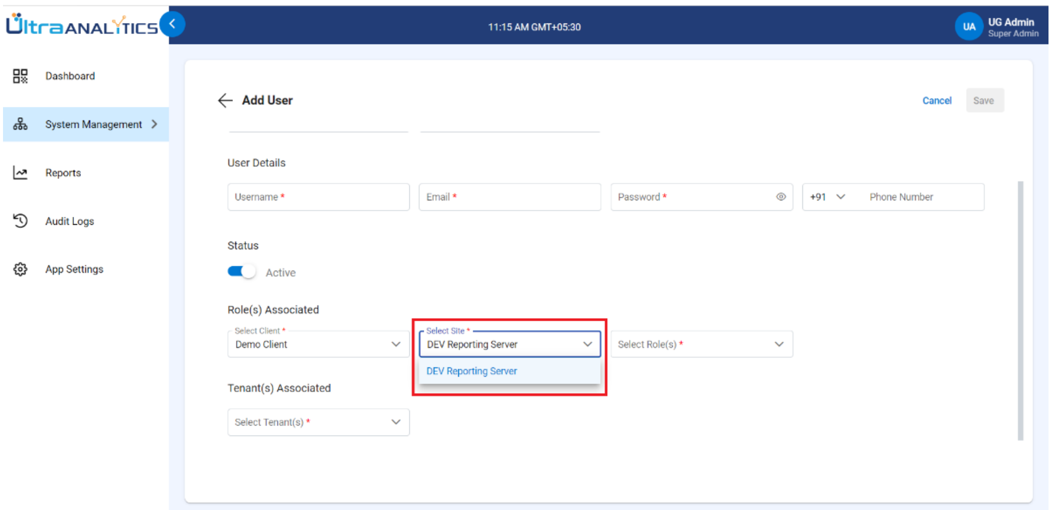
3. The following page will appear. Fill in the required information of a user.



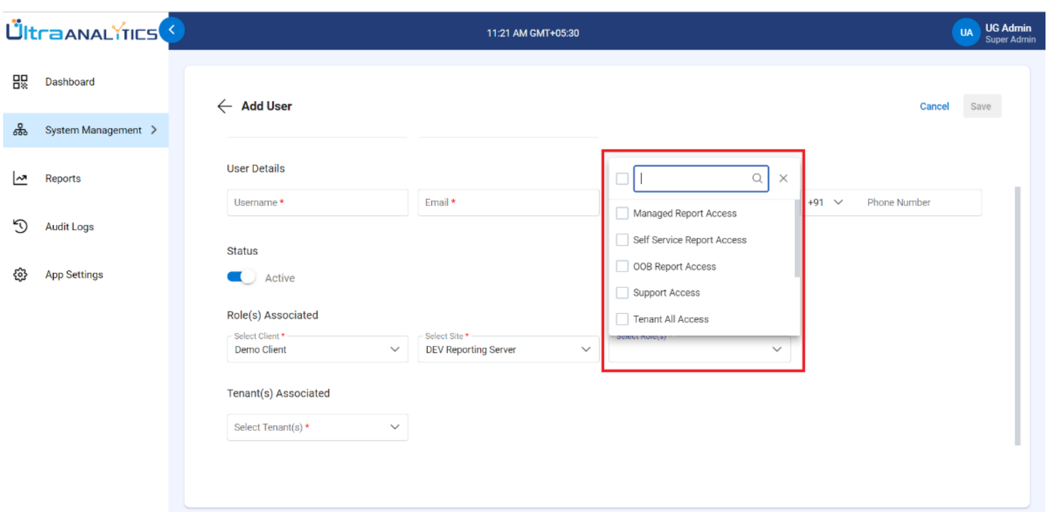
4. Under **Role's associated** section, select the client from the drop-down list. Similarly, users can select site associated with client, role, and enterprise.



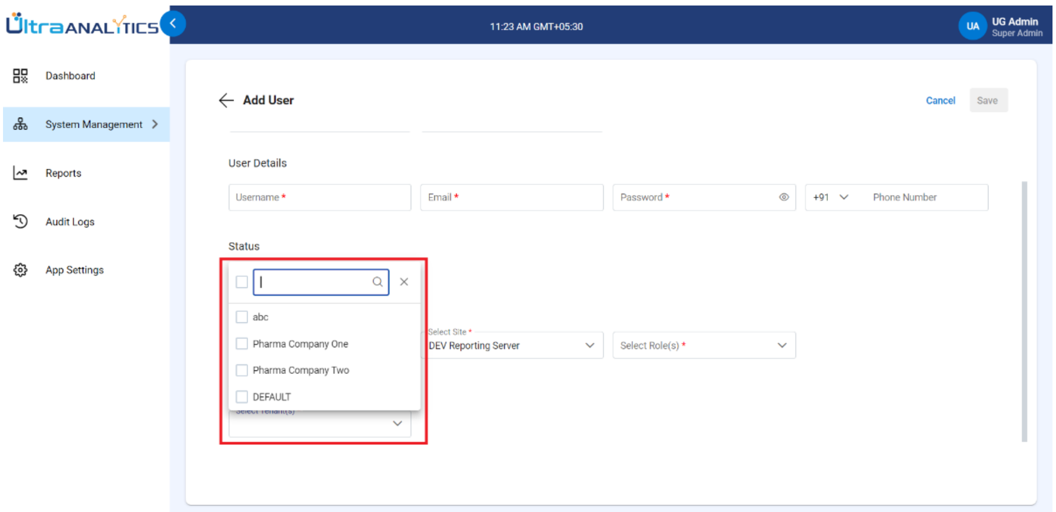
5. Site associated with the client would get populated in the dropdown.



6. On the selection of both client and site, roles associated with them get populated in the dropdown.



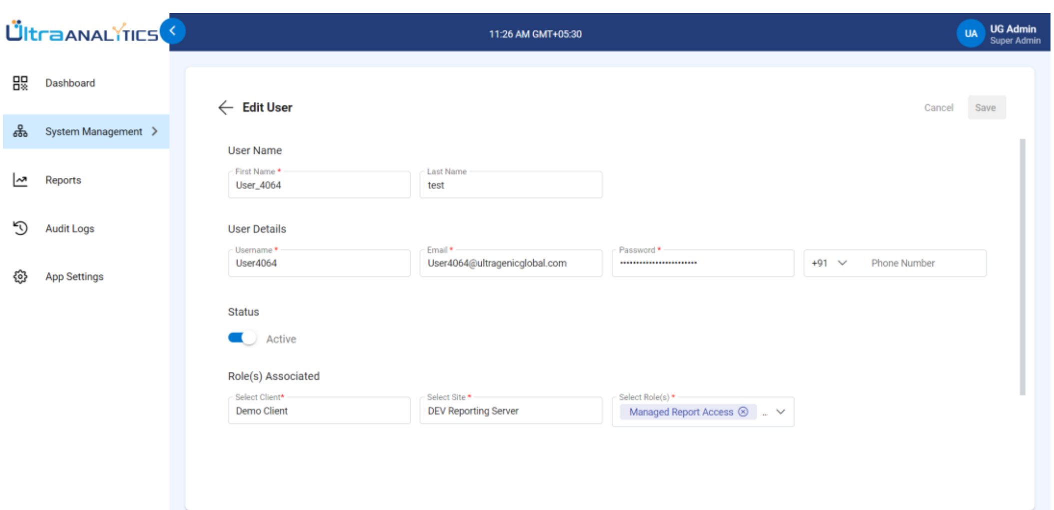
7. As per client selected, tenants associated with that client get populated in the dropdown.



8. User's profile will be created.

Process to Edit a User: (by Super Admin or Client Admin)

1. From the main navigation, click on the Users. Admin will be redirected to user page where it will contain all the client users & support users.
2. Select the desired user.
3. Click on **Edit** button if you wish to modify any information of a user.



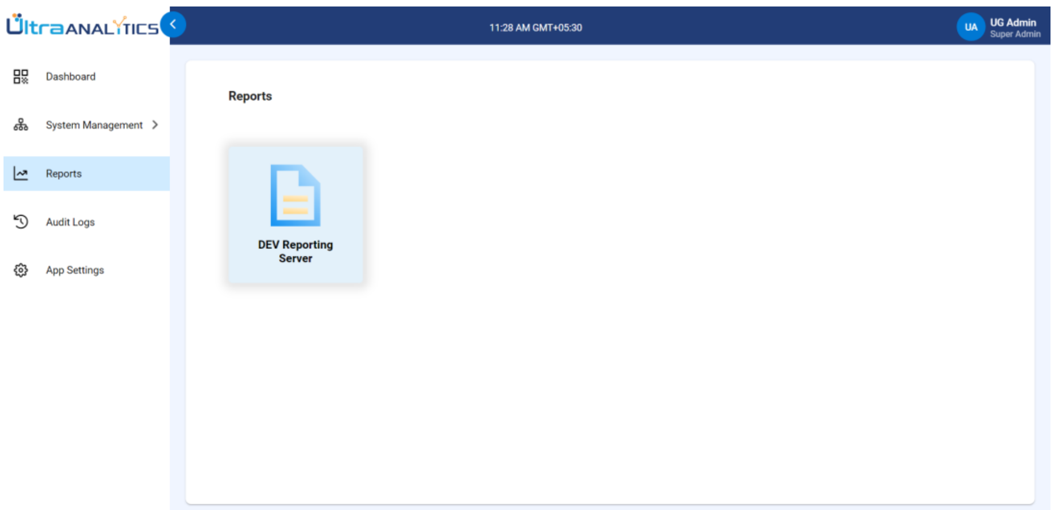
4. Update the information as required and click on **Save**.

6. Reports

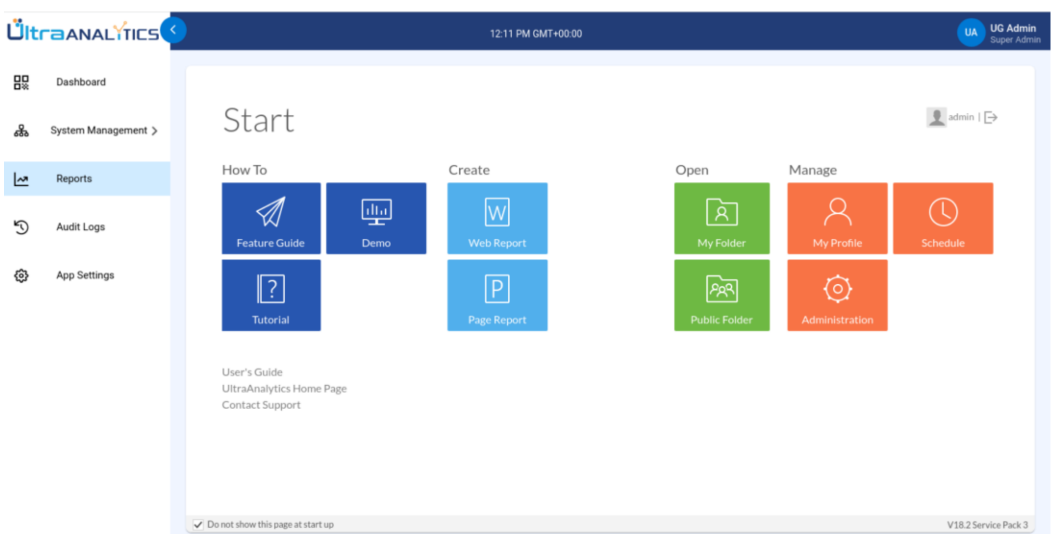
Under Reports, admin would be able to communicate directly with BI server. This section is accessible to both Super Admin and Client Admin.

It would show the list of servers available for communication.

- Click on the desired server available.



- Console opens.



Here, admin would be able to perform all the operations, i.e., create, read, update and delete the report.

7. Audit Logs

1. Super Admin can filter logs based on the following options.

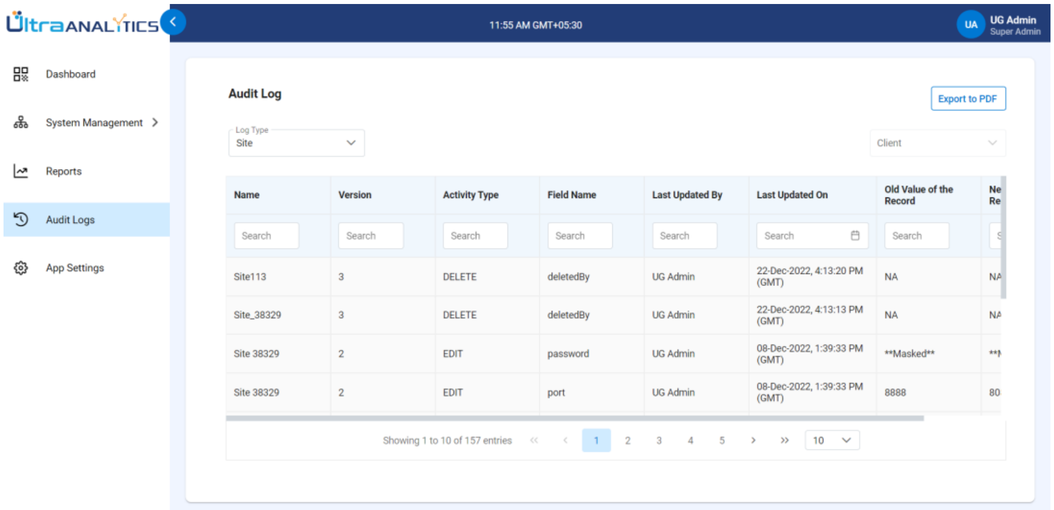
    - Admin
    - Client
    - Site
    - User
    - Role
    - Client configuration
    - Settings

2. Client Admin can filter logs based on the following options.

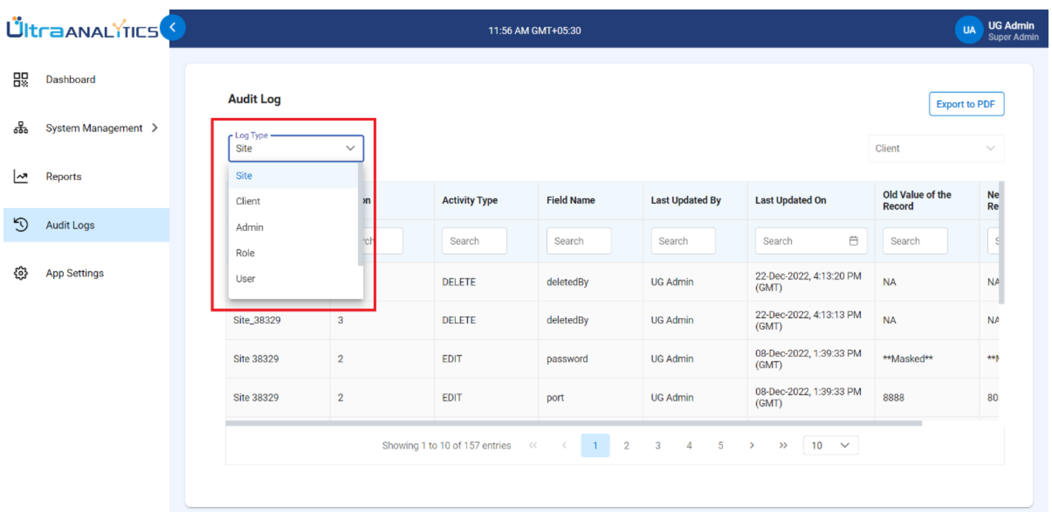
    - Client
    - User
    - Role
    - Client configuration
    - Settings

3. The data will be presented in tabular format. The column names are:

    - Username
    - Version
    - Action
    - Updates
    - Last modified by
    - Last modified on
    - Old data
    - New data



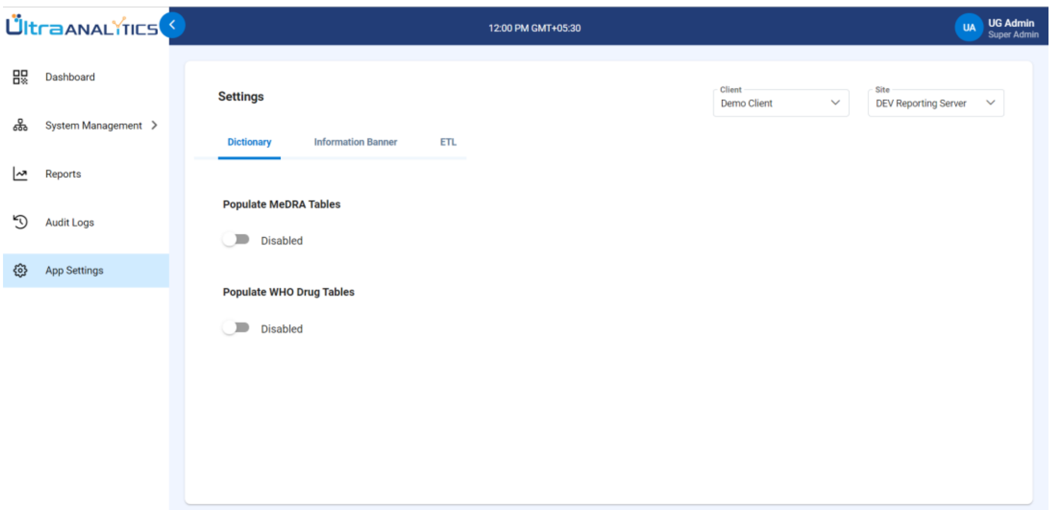
4. From the dropdown, admin can select the client and audit log type i.e., Site/Client/Admin/Role/User to view the audit log of a client.



8. App Settings

Dictionary: - (by Super Admin or Client Admin)

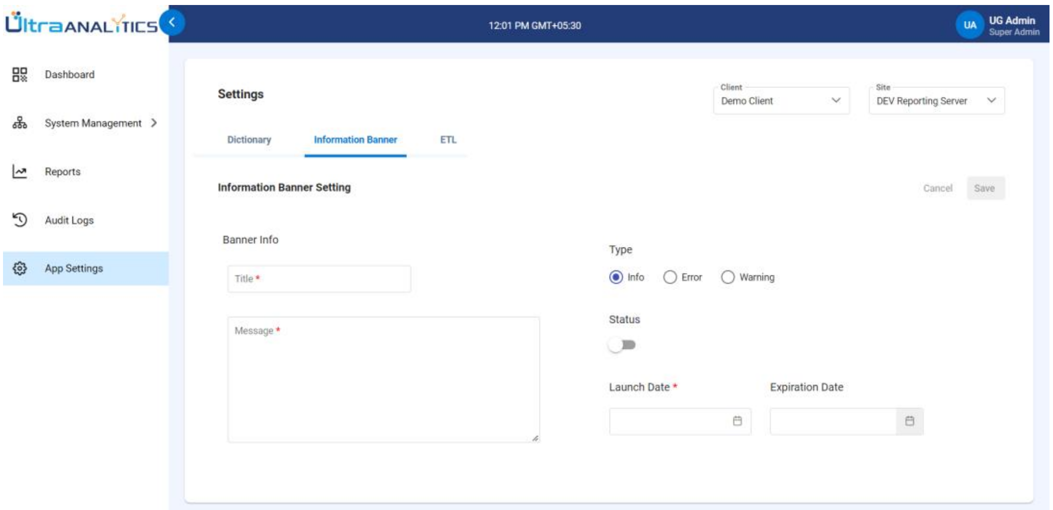
1. Admin can enable and disable the **Dictionary** using the off/on toggle button under **Dictionary** tab.
2. Admin can trigger MedDRA tables loading from source to data warehouse.



Information Banner: - (by Super Admin or Client Admin)

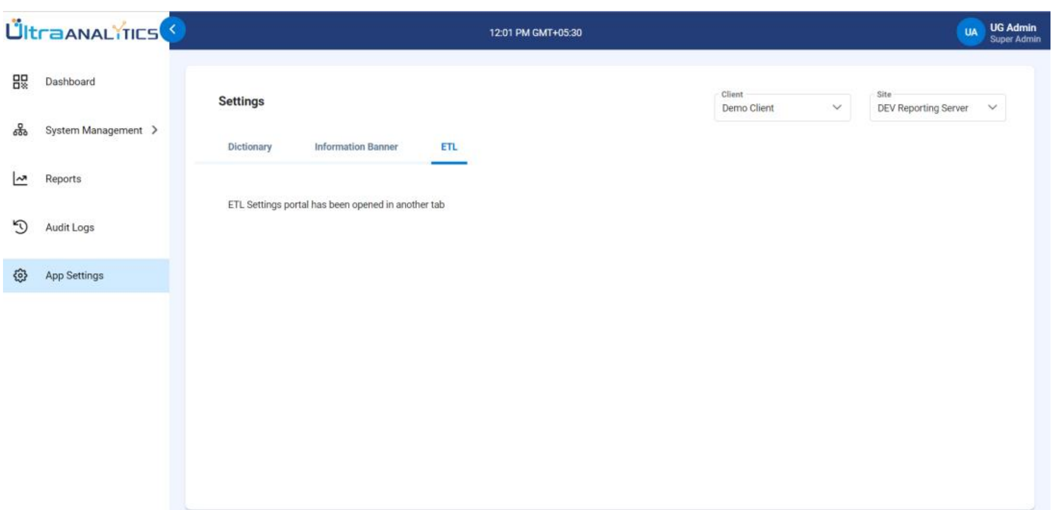
Under the **Information Banner** tab, users can setup any maintenance, error, or warnings messages that will be displayed on dashboard of every user.

1. Fill in the **Title** and the appropriate **message**.
2. Select the **Type** as **Info**, **Error**, or **Warning**.
3. Select the **Visible** or **Not visible** toggle button if you wish to display the message in the dashboard.
4. Enter the **Launch date** and **Expiration date**.
5. Select the radio button to show that the message is applicable to all the clients.
6. Click on **Save**.



ETL: - (by Super Admin or Client Admin)

Users can navigate to Airflow console by clicking ETL tab. Follow the steps mentioned in the Operations Manual to perform operations in Airflow.



9. Reference Document

Document number	Document name
UAN-SDS-UG-001-02.00	System Design Specification
UAN-SDS-UG-002-02.00	System Design Specification- OOB Reporting
UAN-URS-UG-001-01.00	User Requirement Specification
UAN-FRS-UG-001-02.00	Functional Requirement Specification
UAN-FRS-UG-002-02.00	Functional Requirement Specification- OOB Reporting
UAN -UM-UG-001-02.00	User Manual
UAN-OM-UG-001-02.00	Operational Manual

UAN-UM-UG-002-01.00 Admin Manual

Final Audit Report 2023-02-10

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