

## Case Manager Administration

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#### CM Admin Training: Agenda

- Introduction
  - Case Manager organization
- Case Manager Objects Administration
  - Project Management
  - User Management
  - Group Management
  - Roles management
  - Tracker management
  - Issue statuses management
  - Workflow management (Recap)
- Case Manager settings
  - LDAP Authentication
  - SMTP configuration
  - Enable export from **NG** | Screener

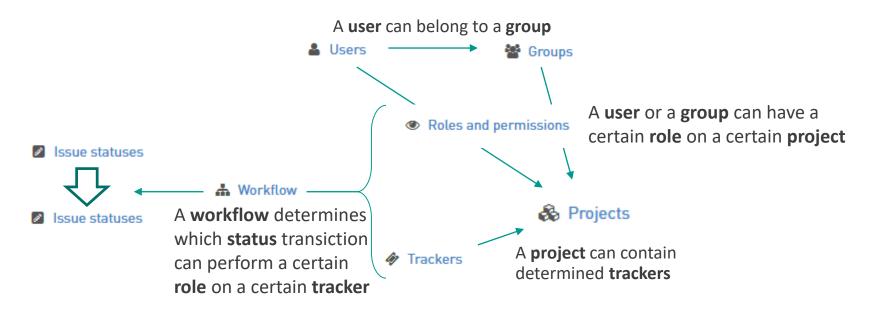


### Introduction





#### Fundamental Objects and Relations in the CM





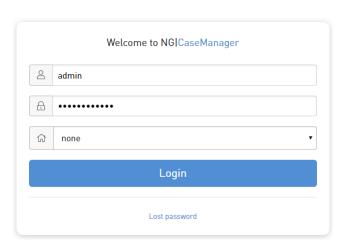
# CM Objects Administration





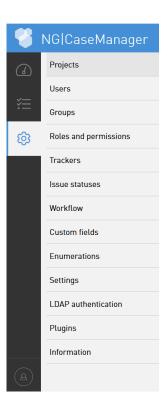
#### **Starting Note**

- Case Manager is Multi-tenant
  - By default one tenant (DEFAULT)
- Administrator could be either.
  - Super admin (what will be covered in the next slides)
    - In Tenant selection select "none"
  - Tenant Admin
    - Limited grants
- To be able to access super admin part
  - https://HOSTNAME/cm/login?local\_login=true
  - Otherwise login goes through NG | Auth
- Covering super admin abilities





#### Introduction



Administration Console

- Super Admin user has grants to manage all objects and relations in CM
  - Not Tenant Admin
- The aim is to fit with Business scenarios



#### **Tenant Admin View**

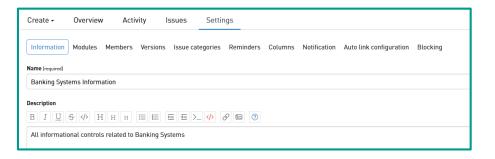


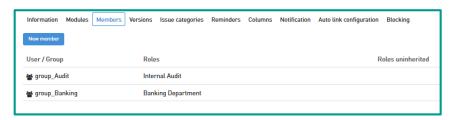
- Tenant admin can only
  - Create new projects (or modify his own)
  - Create users
  - Create groups
  - Specific settings for the tenant
- For workflows, roles, custom fields, etc...
  - Super admin will have to be used



#### **Project Management**

- Project Settings
  - Edit general information
  - Link **Trackers** to the Project
  - Add members (user and groups, with their role)
  - Manage Modules present in the Project





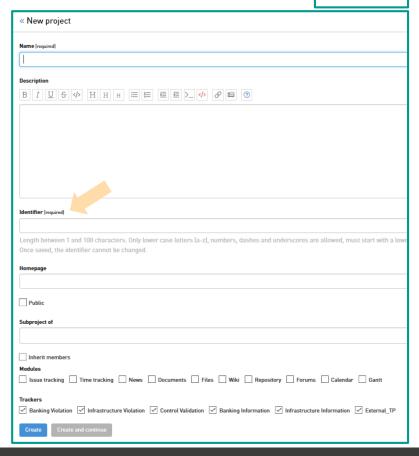




#### **Project Management**

- Create New Project
  - Identifier: Needed when specifying CM exporter targets
  - Public: Will make project visible by everybody
  - Trackers: Will link project to a certain workflow
  - Warning: Uncheck «public» to force user authentication /!\

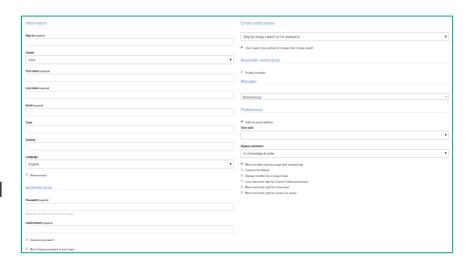






#### **User Management**

- Create User
  - Through NG | Auth
    - Refer to NG | Auth slides
  - Still need to assign a role to the user or put it in a specific group
  - Some specific configuration still need to be done in CM
  - Tenant has to be provided admin rights







#### **User Management**

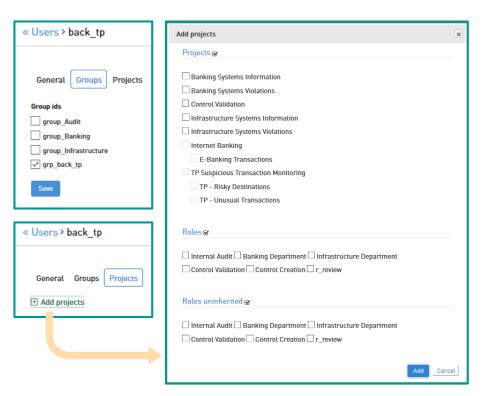
- User Settings
  - Assign user to Groups
  - Assign user to **Projects** (with its role)

#### To add a role:

- click on "Add projects"
- tick the desired combination of Project and Roles, then press "Add".

If a differentiation of roles on projects is required, this operation is to be repeated once per Project

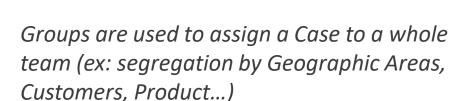
 Usually projects are added to the group and not to the user directly

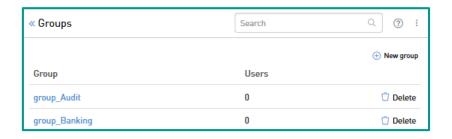


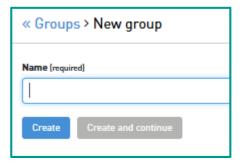


#### **Group Management**

- New group
  - Define members
  - Assign role to Projects at group level



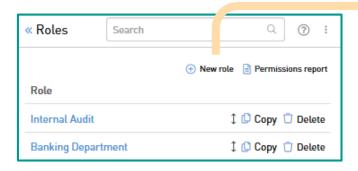


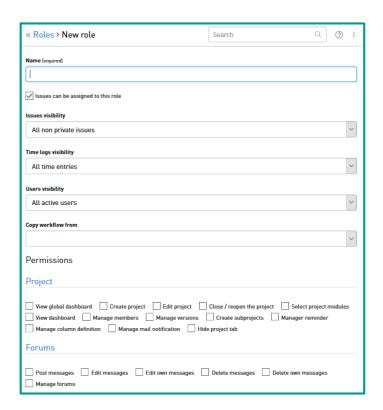




#### Role Management

- New Role
  - Restrict visibility of issues
  - Restrict possible actions
    - Grouped by modules
    - Issue tracking







#### Role Management

User and Group Permissions

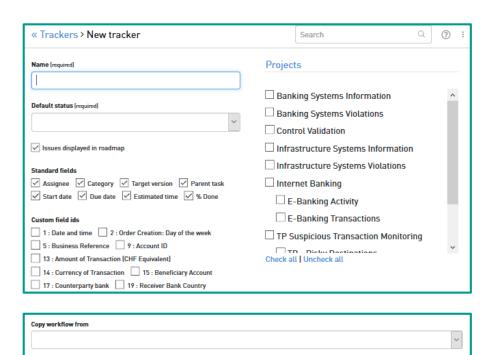
Question: What if a user has role A and the group it belongs to has a role B on a Project?

**Answer:** Permissions will be the sum (union) of grants given by the two roles



#### Tracker Management

- New Tracker
  - Trackers define type of **issues**
  - Special workflows could apply to each Tracker
  - Select which fields are available in the Tracker
  - Select which **Projects** will use the Tracker



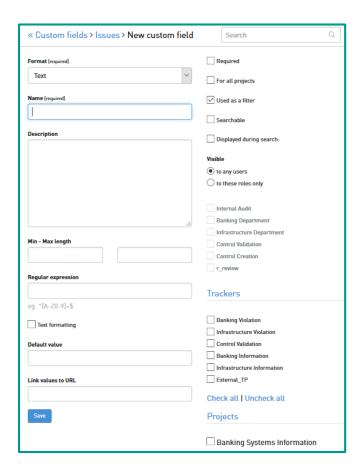
/!\ When creating new Tracker, it's possible to copy the workflow from an existent one





#### **Custom Fields**

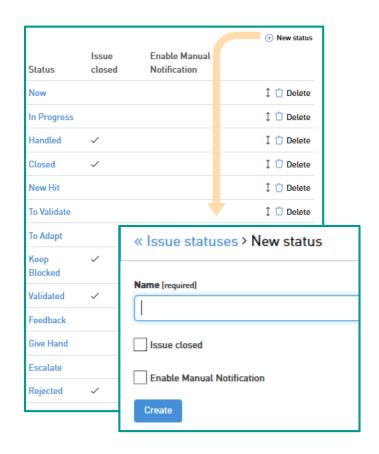
- Used to add new field to "Issues" to <u>customize</u> them
- Add Custom Fields:
  - In Administration → Custom fields
  - Select "New custom field"
  - Type of custom field → Usually "Issues"
  - New custom field form
    - Format (Text, Float, ...)
    - Name (name to appear in issues)
    - ...
  - Select options for field (visibility, searchable, required,...)
  - Select on which **tracker** and **project** it will be present





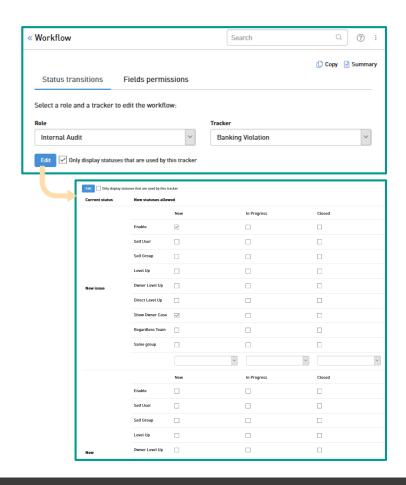
#### **Issues Statuses Management**

- Manage Statuses
  - New status
    - Define if it means issue is closed
    - Define if Manual notification is allowed for this status.
  - Select them in workflows to make them available





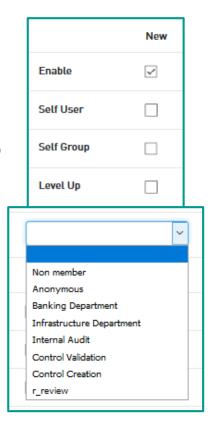
- Manage Workflows
  - Workflows are defined by <u>role</u> and <u>tracker</u> combination
  - Defines allowed change of statuses
  - /!\ When defining new statuses, uncheck «Only display statuses that are used by this tracker» to display them







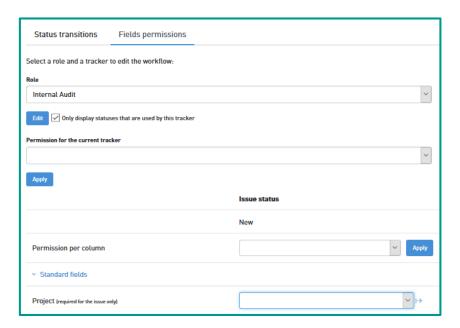
- Main Terms
  - Enable: The User can pass from the X status to the Y status
  - Self User: The user can assign the case to himself from the X status to the Y status
  - Self Group: The user can assign the case to the group he belongs to from the X status to the Y status
  - Level Up : Can be escalated to manager
  - The drop-down menu will define the destination role
  - Please refer to NG\_Case\_Manager\_Admin-Guide for further explanation on the rest of the terms (Autoassign functionality).







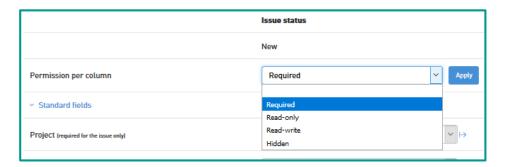
- Fields permissions tab
  - It's possible to define strict permissions for each field of each status (for each role on a single tracker)



- Example:
  - Allow Supervisor to modify Case Subject when case is Pending, forbidding an Analyst to do the same



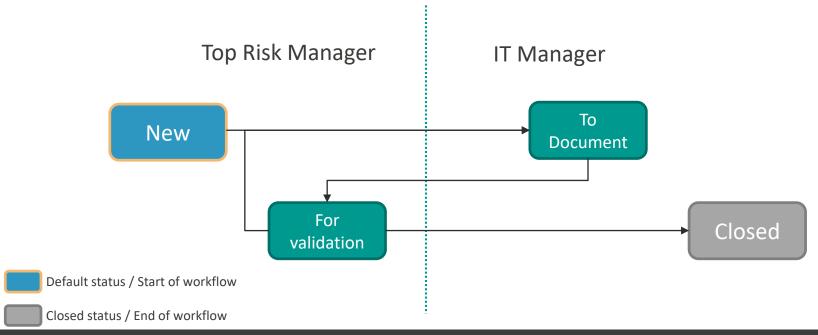
- Fields Permissions Terms
  - Required = Mandatory. Issue cannot be saved if empty
  - Read-Only = No modification possible
  - Read-Write = Fill or not the field
  - Hidden = Not visible field for the current role







Top-Down with 4 eyes check validation







Top-Down with 4 eyes check validation

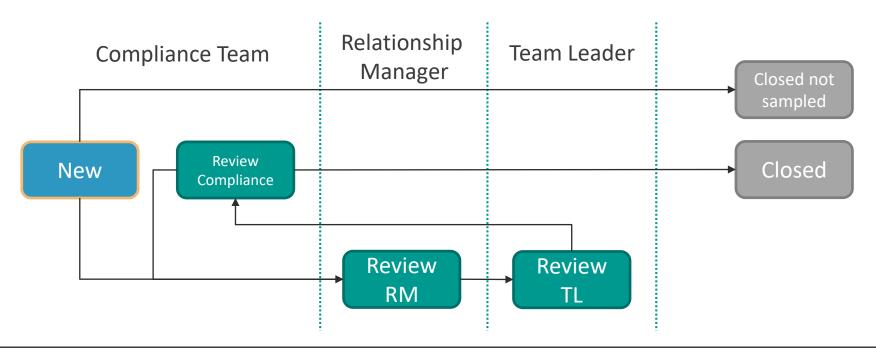
| Current<br>Status / Next<br>status | New | To Document | For Validation | Closed |
|------------------------------------|-----|-------------|----------------|--------|
| New                                |     | Т           |                |        |
| To Document                        |     |             | I              |        |
| For Validation                     |     | Т           |                | Т      |
| Closed                             |     |             |                |        |

T: Top Risk Manager

I: IT Manager



Compliance sampling





#### Compliance sampling

| Current<br>status / Next<br>status | New | Review<br>RM | Review TL | Review<br>Compliance | Closed | Closed not sampled |
|------------------------------------|-----|--------------|-----------|----------------------|--------|--------------------|
| New                                |     | С            |           |                      |        | С                  |
| Review RM                          |     |              | R         |                      |        |                    |
| Review TL                          |     |              |           | Т                    |        |                    |
| Review<br>Compliance               |     | С            |           |                      | С      |                    |
| Closed                             |     |              |           |                      |        |                    |
| Closed not sampled                 |     |              |           |                      |        |                    |

C: Compliance Team

R: Relationship Manager

T: Team Leader



## **CM Settings**





- SMTP Configuration
  - File on linux machine
    - /usr/local/ng-screener/caseManager/config/configuration.yml
    - Connect with PuTTY on port 63022 on NG Appliance
  - Escalade to root: su -
  - Modify address, port and domain (if needed authentication parameters)
  - Restart Case Manager service
    - systemctl restart case-manager.ngc



- SMTP Configuration (configuration.yml)
  - Also sample file configuration.yml.example available (with useful comments)

```
production:
    # Outgoing emails configuration (see examples above)
    email_delivery:
        delivery_method: :smtp
        smtp_settings:
            address: "xx.xx.xxx.xxx"
            port: xx
            domain: "mydomain.com"
            #authentication: :plain
            #user_name: "myusername"
            #password: "myPassword"
            openssl_verify_mode: 'none'
```



- Enable export from NG|Screener
  - Administration -> Settings -> Authentication

 Warning: «Authentication required» should be <u>unchecked!</u> If checked, assigning issues to groups will not work. /!\

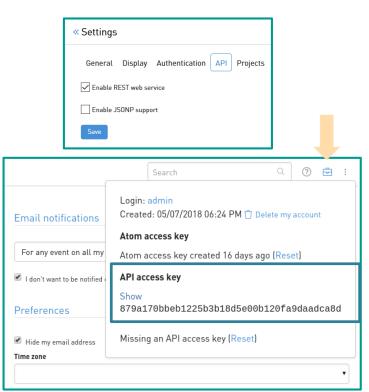






- Enable export from NG|Screener
  - Administration -> Settings -> API
    - Verify that «Enable REST web service»
  - My account (logged as admin)
    - Retrieve the API access key







# THANK YOU!

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