

Slide 1 - ZCCP-IA



Authentication

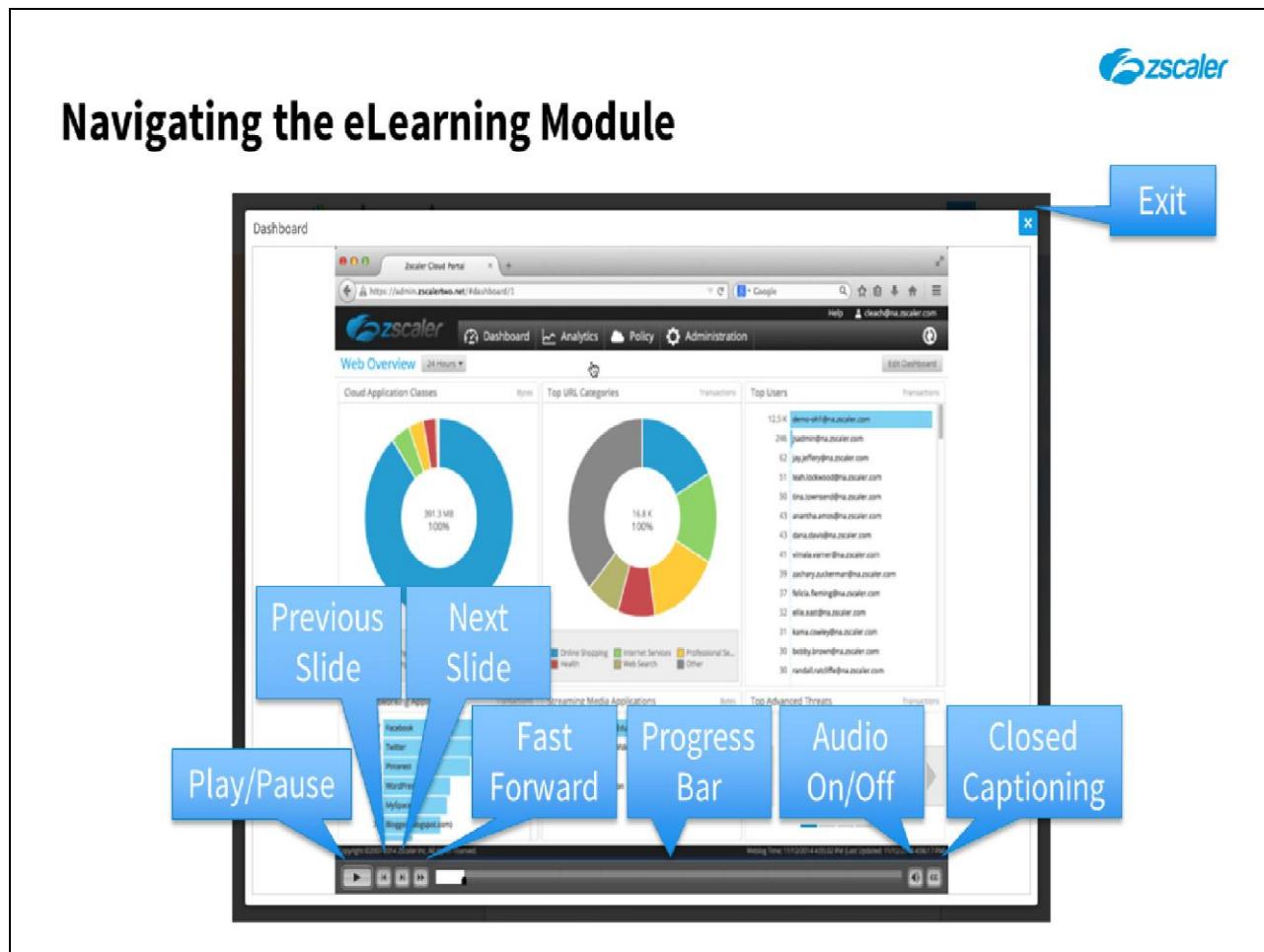
Basics and Hosted Database

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Slide notes

Hello and thank you for viewing this eLearning module on Zscaler User Authentication and the use of the Hosted Database feature.

Slide 2 - Navigating the eLearning Module



Slide notes

Here is a quick guide to navigating this eLearning module. There are various controls for playback including Play/Pause, Previous and Next Slide, and Fast Forward. You can also mute the Audio or enable Closed Captioning which will cause a transcript of the module to be displayed on the screen. Finally, you can click the "X" button if you wish to exit.

Slide 3 - New Product Names

New Product Names



	Current Product Name	New Product Name
Connectors		
	Zscaler App	Client Connector
	ZPA/B2B Connectors	App Connector
Zscaler Service Edge		
	ZPA	
	ZPA Broker	ZPA Public Service Edge
	Private Brokers	ZPA Private Service Edge
	ZIA	
	ZEN/SME	ZIA Public Service Edge
	Private/Virtual ZEN	ZIA Private Service Edge
Other Services		
	Remote Browser Isolation	Cloud Browser Isolation

ZIA: <https://help.zscaler.com/zia/zscaler-product-name-change>

ZPA: <https://help.zscaler.com/zpa/zscaler-product-name-change>

Z-App: <https://help.zscaler.com/z-app/zscaler-product-name-change>

Slide notes

Before you begin, take a moment and familiarize yourself with the recent changes to Zscaler product names used throughout this course. For example, “Zscaler App” is now called “Client Connector”.

A complete reference of old and new product names for ZIA, ZPA and Z-App is available on the Help Portal at the URLs listed here.

Slide 4 - Module Agenda

Module Agenda



- Understanding Groups and Departments
- Authentication using Zscaler Hosted DB
- Additional Tools for the Admin
- Interactive Demo:
 - Creating User / Group / Department
 - Configuring Hosted DB Authentication
 - Enabling User Authentication
- Summary

Slide notes

In this module we will look User Groups and Departments and their role in the system. We will then look at configuring the most basic form of User Authentication - the Hosted DB.

Slide 5 - Groups, Departments, and Authentication using the Hosted Database



Slide notes

Let's begin by understanding the role of the User Group and User Departments and how they can affect user access to network resources.

Slide 6 - Groups and Departments



Groups and Departments

Groups

- Used to configure policy for large number of users
- A user can belong to up to 128 groups
- No limit on number of users in a group
- Example Groups: **facebook-allow** and **twitter-allow**
- If a User belongs to both groups then both Facebook and Twitter are allowed

Slide notes

When adding a user into the Zscaler service, User Groups and User Departments can also be configured. The use of groups and policies enables the admin to create a set of policies and assign those policies to all users or groups of users. If groups were not used there would be a lack of granular control of policies, a lack of granularity in reporting, and a lot of Admin overhead managing policies on a per user basis.

Groups are used in conjunction with policies. You can control access to applications based on user groups. You can define groups and policies based on the applications that users are allowed to access. For example, you can create a Facebook users group and a Twitter users group, define a policy that allows access to Facebook and apply it to the Facebook users group, and define another policy that allows access to Twitter and apply it to the Twitter users group.

Users can belong to one or both groups, depending on their business needs. A user can actually belong to up to 128 groups. If a user belongs to more than one group and each group contains different policies the policies will be combined so the end result will be a hybrid of all the policies.

Slide 7 - Groups and Departments



Groups and Departments

Groups

- Used to configure policy for large number of users
- A user can belong to up to 128 groups
- No limit on number of users in a group
- Example Groups: **facebook-allow** and **twitter-allow**
- If a User belongs to both groups then both Facebook and Twitter are allowed

Departments

- Used for policies and reporting. Ex: Report on Sales or Sales + Marketing
- A user can belong to only one Department
- No limit on number of users in a Department

Slide notes

Departments are used in conjunction with policies and in reports as well. Carefully consider your reporting needs when defining departments in the Zscaler service. Ensure that the departments are structured correctly so that you get the correct department-based reports. Unlike groups, a user can belong to only one department as the service tracks usage at the user level.

If a user were allowed to belong to multiple departments, then they would be reported on multiple times. Additionally, with the role-based admin feature, different administrators can have control over different sets of users in various departments. When you set up administrators, you can define their scope by department. If users were allowed to belong to more than one department this would cause conflicts here as well.

Slide 8 - Provisioning and Authentication Flow



Provisioning and Authentication Flow

1.

Provisioning

- Administrator configures authentication profile
- Users, groups and departments are provisioned on the Cloud
- Provisioning Methods: Manual (CSV Import), Zscaler Authentication Bridge (ZAB), LDAP Bind, SAML Auto-provisioning

Slide notes

Now that we understand the use of Groups and Departments it is important to understand that these items must exist in the Zscaler database for proper authentication and policy assignment. How you populate the Zscaler database varies based on the authentication mechanism you employ for your organization. Provisioning methods include: Manual via the Admin Portal; CSV import; LDAP BIND; or SAML auto-provisioning. These will be demonstrated in the slides and modules that follow.

Slide 9 - Provisioning and Authentication Flow



Provisioning and Authentication Flow

1.

Provisioning

- Administrator configures authentication profile
- Users, groups and departments are provisioned on the Cloud
- Provisioning Methods: Manual (CSV Import), Zscaler Authentication Bridge (ZAB), LDAP Bind, SAML Auto-provisioning

2.

Policy Configuration

- Administrator creates policy for group or users

Slide notes

Once the user is created in the system the user should also be tied to a policy (covered in another module), or multiple policies, that determine levels of access. The user is also tied to a department for reporting.

Slide 10 - Provisioning and Authentication Flow



Provisioning and Authentication Flow

1.

Provisioning

- Administrator configures authentication profile
- Users, groups and departments are provisioned on the Cloud
- Provisioning Methods: Manual (CSV Import), Zscaler Authentication Bridge (ZAB), LDAP Bind, SAML Auto-provisioning

2.

Policy Configuration

- Administrator creates policy for group or users

3.

Authentication

- User is challenged for the authentication
- Upon authentication appropriate policy is enforced

Slide notes

When the user is authenticated the system sees the policy that has been assigned to the user, either directly or via a group, which then determines access privileges.

Slide 11 - Authentication using Zscaler Hosted DB



Slide notes

Let's take a look at configuring the Hosted Database.

Slide 12 - Zscaler Hosted Database + Form Authentication



Zscaler Hosted Database + Form Authentication

- Users are provisioned into and stored within the Zscaler service database and authenticate against Zscaler directly

Provisioning

- Users added and configured manually at the Admin Portal
- Users can be added and configured by CSV import

Slide notes

The first, and most basic authentication method supported by Zscaler is the Hosted database. User provisioning is a manual process by the administrator and requires the Admin to create the user accounts via the Admin Portal. The user list, alternatively, can be compiled in a CSV then uploaded to Zscaler.

Slide 13 - Zscaler Hosted Database + Form Authentication



Zscaler Hosted Database + Form Authentication

- Users are provisioned into and stored within the Zscaler service database and authenticate against Zscaler directly

Provisioning	Authentication
<ul style="list-style-type: none">• Users added and configured manually at the Admin Portal• Users can be added and configured by CSV import	<ul style="list-style-type: none">• Cookie based with redirects• Configurable authentication intervals (only once, every session, daily, custom)

Slide notes

Authentication is cookie based with redirects and user authentication can be set to require the user to authenticate: **Daily; Only Once; Once Per Session** (or each time the browser closes, or the cookies are deleted); or a **Custom** time period.

Slide 14 - Zscaler Hosted Database + Form Authentication



Zscaler Hosted Database + Form Authentication

- Users are provisioned into and stored within the Zscaler service database and authenticate against Zscaler directly

Provisioning	Authentication	Benefits
<ul style="list-style-type: none">• Users added and configured manually at the Admin Portal• Users can be added and configured by CSV import	<ul style="list-style-type: none">• Cookie based with redirects• Configurable authentication intervals (only once, every session, daily, custom)	<ul style="list-style-type: none">• Simple to deploy• No integrations with external services• Useful for small deployments• Users can reset passwords• Password expiry and complexity are supported

Slide notes

The benefits of the Hosted DB are: That it is simple to implement, with no external authentication methods to deploy; it is also useful in a small deployment with a limited number of users.

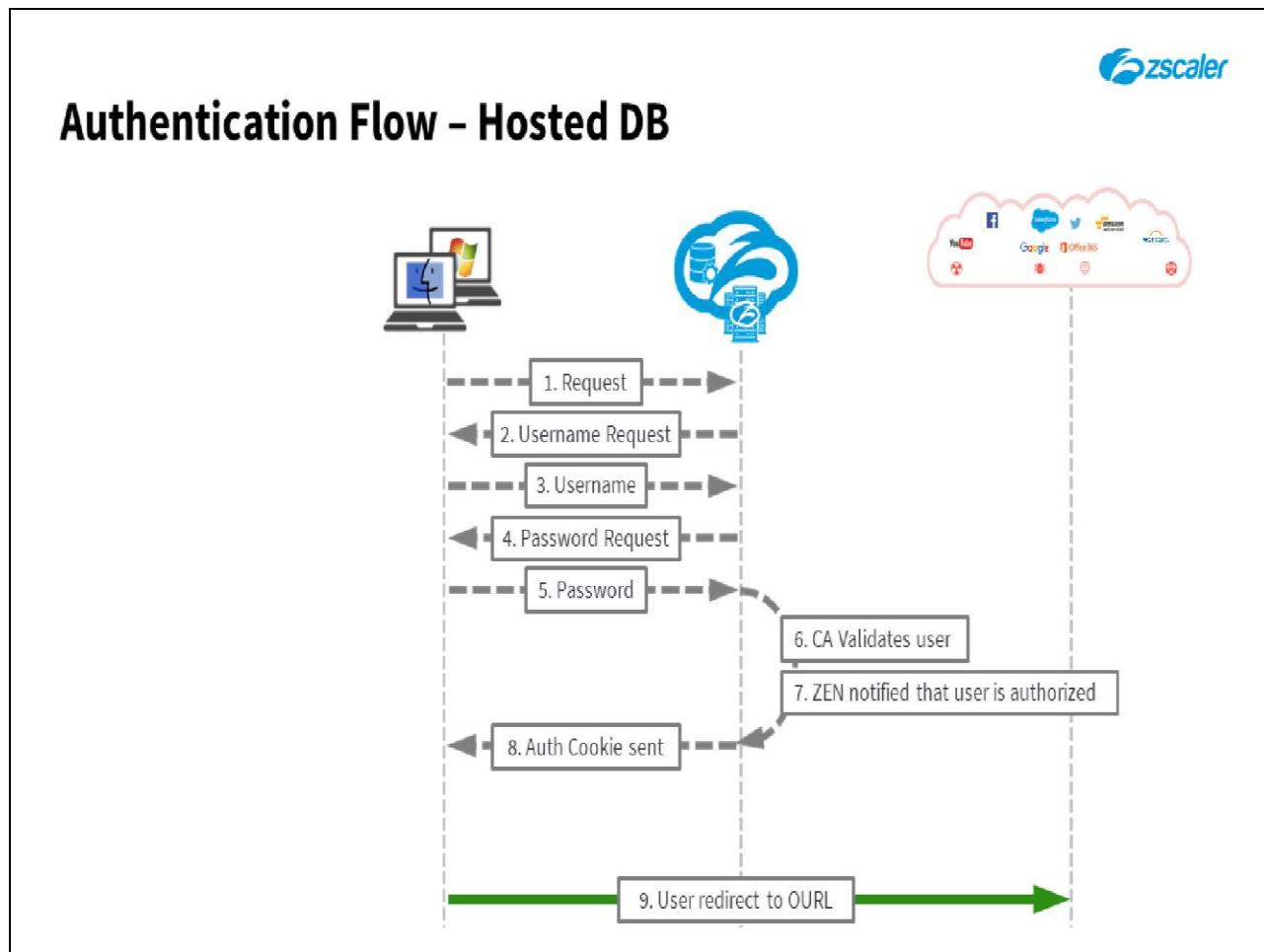
Slide 15 - Zscaler Hosted Database + Form Authentication

<h2>Zscaler Hosted Database + Form Authentication</h2>								
								
<p>• Users are provisioned into and stored within the Zscaler service database and authenticate against Zscaler directly</p> <table border="1"><thead><tr><th>Provisioning</th><th>Authentication</th><th>Benefits</th><th>Challenges</th></tr></thead><tbody><tr><td><ul style="list-style-type: none">• Users added and configured manually at the Admin Portal• Users can be added and configured by CSV import</td><td><ul style="list-style-type: none">• Cookie based with redirects• Configurable authentication intervals (only once, every session, daily, custom)</td><td><ul style="list-style-type: none">• Simple to deploy• No integrations with external services• Useful for small deployments• Users can reset passwords• Password expiry and complexity are supported</td><td><ul style="list-style-type: none">• Manual creation and configuration of accounts• Not scalable• Application / Browser must support Cookies</td></tr></tbody></table>	Provisioning	Authentication	Benefits	Challenges	<ul style="list-style-type: none">• Users added and configured manually at the Admin Portal• Users can be added and configured by CSV import	<ul style="list-style-type: none">• Cookie based with redirects• Configurable authentication intervals (only once, every session, daily, custom)	<ul style="list-style-type: none">• Simple to deploy• No integrations with external services• Useful for small deployments• Users can reset passwords• Password expiry and complexity are supported	<ul style="list-style-type: none">• Manual creation and configuration of accounts• Not scalable• Application / Browser must support Cookies
Provisioning	Authentication	Benefits	Challenges					
<ul style="list-style-type: none">• Users added and configured manually at the Admin Portal• Users can be added and configured by CSV import	<ul style="list-style-type: none">• Cookie based with redirects• Configurable authentication intervals (only once, every session, daily, custom)	<ul style="list-style-type: none">• Simple to deploy• No integrations with external services• Useful for small deployments• Users can reset passwords• Password expiry and complexity are supported	<ul style="list-style-type: none">• Manual creation and configuration of accounts• Not scalable• Application / Browser must support Cookies					

Slide notes

The Challenges are: That the Administrator must create each entry manually, in the Admin Portal, or upload a user list in CSV; and this method does not scale as easily as other authentication methods

Slide 16 - Authentication Flow - Hosted DB



Slide notes

This image details the authentication process when the users are provisioned in a database hosted on Zscaler Cloud. Let's walk through the process: 1. The user sends a request to the ZEN in the Zscaler cloud; 2. The ZEN sends the request for the username; 3. The user returns the username to the ZEN; 4. The Zscaler Central Authority (or CA) sends the request for the password;

5. The user returns the password to the CA; 6. The CA validates the credentials against its database; 7. If the credentials are correct, the CA notifies the ZEN that the user is authorized; 8. The ZEN sends the authentication cookie to the user; 9. The user is redirected to its original URL request.

It is important to point out that all the authentication steps outlined above happen over SSL. No data is sent in clear at any point during the authentication phase.

Slide 17 - Additional Tools for the Admin: One-Time Token and One-Time Link

Additional Tools for the Admin: One-Time Token and One-Time Link

Slide notes

Slide 18 - User Password Recovery Options

The screenshot shows two parts: a web interface and an email message.

Web Interface: The top part is a login screen titled "Marcus Internal Training". It has fields for "Login" and "Password", and links for "Change login name" and "Change Password". A red circle highlights a link at the bottom: "If you have forgotten your password or do not have one, please click [here](#) to receive a temporary password by email".

Email Message: The bottom part is an email from "no-reply@zscalertwo.net" to "test_onetime@marcus.zscaler.com" dated Thu 3/5/2015 11:25 AM. It contains a temporary password: "S2650JQo2!". The message also includes instructions for accessing the Internet securely and contact information for IT support.

Slide notes

A tool, One-Time Token, is available that allows users to recover forgotten passwords or, if the Admin chose to leave the password column blank, the user can assign their own first-time password. The prompt circled on this slide appears only if the One-Time Token feature is enabled. The user receives an email similar to the one shown on the right and it contains their username and temporary password.

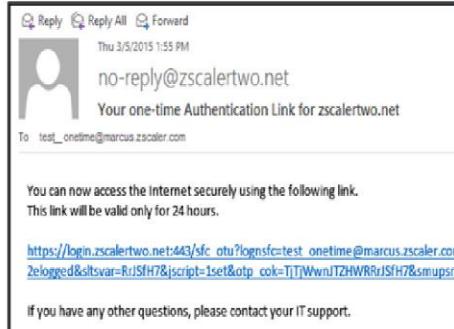
Upon logging in with the temporary password they will be prompted to change it. Remember, password complexity can be enforced as shown previously.

Slide 19 - User Password Recovery Options

User Password Recovery Options

- Two additional authentication tools are available
 - One-Time Token
 - Temporary password sent to the user
 - Valid for 24hrs
 - One-Time Link
 - Unique URL emailed to the user
 - When the user clicks on the link in the email they are logged in without a password
 - Very simple scheme with no admin intervention, passwords to remember, or any external SW solutions
 - Link is valid for 24hrs

The screenshot shows the Zscaler login interface titled "Marcus Internal Training". It features fields for "Login" and "Password", and links for "Change login name" and "Change Password". Below the fields is a red-outlined box containing the text: "Please click [here](#) to receive an authentication link by email, alternatively if you have a password enter it above". At the bottom, a green bar displays the copyright notice: "Copyright ©2007-2015, Zscaler Inc. All rights reserved."



Slide notes

Similar to the One-Time Token feature, the One-Time Link feature relieves the Administrator of the burden of user password administration. If the user does not have a password assigned, he/she can click on the link highlighted at the bottom of the login prompt. This link will only appear if the One-Time Link feature is enabled. The user will receive an email similar to the one shown to the right.

Slide 20 -

Creating User / Group / Department entries:

Manually and CSV import



Demonstration: Creating User / Group / Department

Slide notes

Slide 21 - Slide 21



Slide notes

Users, Groups, and Departments must be created in the Zscaler service. They can be created manually or automatically depending on the authentication method employed for your organization. For the purpose of this demonstration we will create the User, Group, and Department manually. In the following modules on LDAP, SAML, and Kerberos, this information will be automatically imported.

To manually add a User, Group, and Department click on the **Administration** tab, ...

Slide 22 - Slide 22

The screenshot shows the Zscaler Cloud Control Panel interface. On the left, there's a sidebar with various navigation options like Dashboard, Analytics, Policy, Administration, Activation, and Search. A callout box highlights the 'User Management' link under the 'Administration' section. The main content area has several sections: 'TOP URL CATEGORIES' (a donut chart showing 5.9 K transactions across various categories), 'STREAMING MEDIA APPLICATIONS' (a bar chart showing YouTube, Dailymotion, and Vimeo traffic), 'TOP USERS' (a list of users with their transaction counts), and 'TOP ADVANCED THREATS' (a section showing a large red '75' and the word 'Phishing'). The top of the page has a header with 'Seven Days' and a dropdown menu.

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Slide notes

...then **User Management**.

Slide 23 - Slide 23

The screenshot shows the 'User Management' page with the 'Groups' tab highlighted. A callout bubble points to the 'Groups' tab with the text 'Click GROUPS'. The main table lists 15 users with their details: User ID, Display Name, Groups, Department, and Comments. The 'Groups' column for user 1 shows '2, BadUsers, ipad, Streaming'. The 'Comments' column for user 15 shows 'Imported user'.

No.	User ID or Name	Display Name	Groups	Department	Comments
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---
10	admin2@training.safemarch.com	admin2	---	---	---
11	admin3@training.safemarch.com	admin3	---	---	---
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---

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Slide notes

Next, click on the **Groups** tab, ...

Slide 24 - Slide 24

The screenshot shows the Zscaler User Management interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area is titled 'User Management' and has tabs for 'USERS', 'GROUPS' (which is selected), and 'DEPARTMENTS'. Below the tabs are buttons for 'Add Group', 'Download', 'Import', and 'Sample Import CSV file'. There's also a search bar and a refresh icon. The main content area displays a table with columns 'No.', 'Name', and 'Comments'. The table lists various groups from 1 to 15, including Administrators, android, BadUsers, Building & Grounds, Denied RODC Password Replication Group, Dev, Domain Admins, Domain Users, Engineering, Engineering Development, Engineering QA, Everyone, and Executive. Each row has a delete icon on the right. A callout box with the text 'Click Add Group' points to the 'Add Group' button.

No.	Name	Comments
1		---
2		---
3	Administrators	---
4	android	---
5	BadUsers	---
6	Building & Grounds	---
7	Denied RODC Password Replication Group	---
8	Dev	---
9	Domain Admins	---
10	Domain Users	---
11	Engineering	---
12	Engineering Development	---
13	Engineering QA	---
14	Everyone	---
15	Executive	---

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Slide notes

...then click **Add Group**.

Slide 25 - Slide 25

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Add Group", "Download", "Import", and "Sample Import CSV file". A search bar is also present. The main content area displays a list of existing groups with columns for "No.", "Name", and "Comments". A modal dialog box titled "Add Group" is open in the center. It has fields for "Name" and "Comments", and buttons for "Save" and "Cancel". A tooltip or callout box points to the "Name" field with the text "Type ‘Test_Group’ and hit enter". At the bottom right of the dialog, there is a blue circular icon with a white question mark.

Slide notes

Type the name of the new Group, ...

Slide 26 - Slide 26

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area is titled 'User Management' and has tabs for 'USERS', 'GROUPS' (which is selected), and 'DEPARTMENTS'. Below the tabs are buttons for 'Add Group', 'Download', 'Import', and 'Sample Import CSV file'. A search bar is also present. The main content area displays a list of groups with columns for 'No.', 'Name', and 'Comments'. A modal dialog box titled 'Add Group' is open in the center. It contains fields for 'Name' (with 'Test_Group' typed in) and 'Comments' (an empty text area). At the bottom of the dialog are 'Save' and 'Cancel' buttons. A callout bubble with the text 'Click Save' points to the 'Save' button. The background list shows various group names like 'Administrators', 'android', 'BadUsers', etc.

Slide notes

...and any comments about the Group then click **Save**.

Slide 27 - Slide 27

The screenshot shows the 'User Management' page with the 'DEPARTMENTS' tab selected. A message at the top right says 'All changes have been saved.' Below the tabs are buttons for 'Add Group', 'Download', 'Import', and 'Sample Import CSV file'. A search bar is also present. The main area is a table with columns 'No.', 'Name', and 'Comments'. The table lists 15 departments, each with a edit icon (pencil) and a delete icon (trash can). The departments listed are: 1, 2, Administrators, android, BadUsers, Building & Grounds, Denied RODC Password Replication Group, Dev, Domain Admins, Domain Users, Engineering, Engineering Development, Engineering QA, Everyone, and Executive.

No.	Name	Comments
1	1	---
2	2	---
3	Administrators	---
4	android	---
5	BadUsers	---
6	Building & Grounds	---
7	Denied RODC Password Replication Group	---
8	Dev	---
9	Domain Admins	---
10	Domain Users	---
11	Engineering	---
12	Engineering Development	---
13	Engineering QA	---
14	Everyone	---
15	Executive	---

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Slide notes

Slide 28 - Slide 28

The screenshot shows the Zscaler User Management interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration (selected), Activation, and Search. The main area has tabs for USERS, GROUPS, and DEPARTMENTS, with the DEPARTMENTS tab highlighted. Below the tabs are buttons for Add Group, Download, Import, and Sample Import CSV file. A search bar is on the right. A large callout box with a grey border and a white background contains the text "Click DEPARTMENTS". The main table lists groups with columns for No., Name, and three small icons. The groups listed are:

No.	Name	
1	1	...
2	2	...
3	Administrators	...
4	android	...
5	BadUsers	...
6	Building & Grounds	...
7	Denied RODC Password Replication Group	...
8	Dev	...
9	Domain Admins	...
10	Domain Users	...
11	Engineering	...
12	Engineering Development	...
13	Engineering QA	...
14	Everyone	...
15	Executive	...

At the bottom of the table is a blue circular button with a white icon. The footer of the page includes copyright information, a weblog time, and a last updated timestamp.

Slide notes

You will now see the new group you just created in the list. Now, click on the **Departments** tab, ...

Slide 29 - Slide 29

The screenshot shows the 'User Management' section of the Zscaler interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration (selected), Activation, Search, and Help. The main area is titled 'User Management' and has tabs for 'USERS', 'GROUPS' (which is selected), and 'DEPARTMENTS'. Below the tabs are buttons for 'Add ClickBox' (highlighted with a callout bubble), 'Download', 'Import', and 'Sample Import CSV file'. A search bar with placeholder 'Search...' is also present. The main content area displays a table with columns 'No.' and 'Comments'. The table lists 15 departments: 1. Engineering, 2. Engineering Development, 3. Engineering QA, 4. Executive, 5. Finance, 6. Human Resources, 7. Inside Sales, 8. IT, 9. IT Networking, 10. IT Security, 11. Legal, 12. Marketing, and 13. Normal. Each row has a delete icon in the last column. At the bottom right of the table is a blue circular icon with a white 'X' and the number '0'. At the bottom of the page, there is a footer with copyright information: 'Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents' and 'Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM'.

Slide notes

...then click **Add Department**.

Slide 30 - Slide 30

The screenshot shows the Zscaler User Management interface. On the left, there is a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and has tabs for 'USERS', 'GROUPS', and 'DEPARTMENTS'. Below the tabs, there are buttons for 'Add Department', 'Download', 'Import', and 'Sample Import CSV file'. A search bar is also present. The main content area displays a table with columns 'No.', 'Name', and 'Comments'. The table lists 15 departments, such as 'BadUsers', 'Building & Grounds', 'Engineering', etc. A modal dialog box titled 'Add Department' is open in the center. It has fields for 'Department Name' (containing the placeholder 'Type “Test_Department” and hit enter') and 'Comments'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The status bar at the bottom of the screen shows 'Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Policies' and 'Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM'.

Slide notes

Provide the name of the Department and any comments describing the purpose of the department, ...

Slide 31 - Slide 31

The screenshot shows the Zscaler User Management interface. On the left, there is a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area is titled "User Management" and has tabs for "USERS", "GROUPS", and "DEPARTMENTS". Below the tabs, there are buttons for "Add Department", "Download", "Import", and "Sample Import CSV file". A search bar is also present. The main content area displays a list of departments with columns for "No.", "Name", and "Comments". A modal dialog box titled "Add Department" is open in the center. It has a "Department Name" field containing "Test_Department" and a "Comments" text area. At the bottom of the dialog are "Save" and "Cancel" buttons. A callout bubble points to the "Save" button with the text "Click Save".

Slide notes

...then click **Save**.

Slide 32 - Slide 32

The screenshot shows the 'User Management' page with a sidebar containing icons for Dashboard, Analytics, Policy, Administration (selected), Activation, Search, and Help. The main area displays a table of departments with columns for No., Name, and Comments. A message at the top indicates 'All changes have been saved.' A search bar and a CSV import button are also present.

No.	Name	Comments
1	BadUsers	---
2	Building & Grounds	---
3	Engineering	---
4	Engineering Development	---
5	Engineering QA	---
6	Executive	---
7	Finance	---
8	Human Resources	---
9	Inside Sales	---
10	IT	---
11	IT Networking	---
12	IT Security	---
13	Legal	---
14	Marketing	---
15	Normal	---

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Slide notes

Slide 33 - Slide 33

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration (selected), Activation, and Search. The main area is titled "User Management" and has tabs for "Users" (selected), "GROUPS", and "DEPARTMENTS". Below the tabs are buttons for "Add Department", "Download", "Import", and a link to "Sample Import CSV file". There is also a search bar with a magnifying glass icon. The main content area displays a table with columns "No.", "Comments", and an edit icon. The table lists the following data:

No.	Comments
1	BadUsers
2	Building & Grounds
3	Engineering
4	Engineering Development
5	Engineering QA
6	Executive
7	Finance
8	Human Resources
9	Inside Sales
10	IT
11	IT Networking
12	IT Security
13	Legal
14	Marketing
15	Normal

At the bottom of the interface, there is a footer with copyright information: "Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents". To the right, it says "Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM".

Slide notes

Now, create a user by clicking on the **Users** tab, ...

Slide 34 - Slide 34

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Click Boxer", "Download", "Import", and "Sample Import CSV file". A search bar at the top right includes fields for "User ID or Name" and "Search...". The main content is a table with columns: No., User ID or Name, User Display Name, Groups, Department, Comments, and an edit icon. The table lists 15 users, each with a unique ID, name, display name, group membership, department, and comments. A callout box with the text "Click Add User" points to the "Click Boxer" button. At the bottom of the page, there is a footer with copyright information and a timestamp.

No.	User ID or Name	User Display Name	Groups	Department	Comments	
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

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Slide notes

...then click **Add User**.

Slide 35 - Slide 35

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and has tabs for USERS, GROUPS, and DEPARTMENTS. A modal window titled 'Add User' is open. In the 'USER' section, the 'User ID' field contains 'training.safemarch.com'. A tooltip overlay says 'Type "Test_User" and hit enter'. Below it, the 'User Display Name' field is empty. The 'Department' dropdown is set to 'NONE'. The 'Comments' section is empty. In the 'PASSWORD' section, there are two fields: 'Password' and 'Confirm Password', both empty. Below that is a 'Temporary Authentication Email' field, also empty. At the bottom of the modal are 'Save' and 'Cancel' buttons. The background shows a list of existing users with their email addresses.

Slide notes

Enter a **User ID**.

Slide 36 - Slide 36

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS, and DEPARTMENTS, with 'USERS' selected. Below the tabs are buttons for 'Add User', 'Download', and 'Import'. A table lists 15 users with their email addresses. A modal window titled 'Add User' is open. In the 'USER' section, the 'User ID' field contains 'Test_User' and the 'Email' field contains 'training.safemarch.com'. A tooltip says 'Type "Test_User" and hit enter'. The 'Groups' section is empty. The 'Department' section shows 'NONE'. The 'Comments' section is empty. In the 'PASSWORD' section, there are fields for 'Password' and 'Confirm Password'. The 'Temporary Authentication Email' field is empty. At the bottom of the modal are 'Save' and 'Cancel' buttons. The background shows a list of users with a search bar at the top.

Slide notes

The **Display Name**, ...

Slide 37 - Slide 37

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS (which is selected), and DEPARTMENTS. A modal window titled 'Add User' is open. In the 'USER' section, the 'User ID' field contains 'Test_User' and the 'User Display Name' field contains 'Test_User'. The 'Groups' dropdown menu is open, showing 'None' and 'Click Box'. A callout bubble points to the 'Groups' field with the text 'Click in the Groups field'. Below the 'USER' section is a 'PASSWORD' section with 'Password' and 'Confirm Password' fields. At the bottom of the modal are 'Save' and 'Cancel' buttons. In the background, there's a list of users with their email addresses and a search bar.

Slide notes

...and then select the group association for this user from the Group drop-down list. Remember, a user can belong to just a single group or be a member of multiple groups - up to 128.

Slide 38 - Slide 38

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and has tabs for USERS, GROUPS, and DEPARTMENTS. Under the USERS tab, there's a table listing users from 1 to 15. The 'GROUPS' tab is active, showing a sub-dialog titled 'Add User'. In this dialog, under the 'USER' section, the 'User ID' field contains 'Test_User' and the 'User Display Name' field also contains 'Test_User'. The 'Groups' dropdown is open, showing a list of items with 'None' selected. A search bar at the top of this list shows 'test'. Below the search bar, 'Unselected Items' and 'Selected Items (0)' sections are shown. The 'Unselected Items' section contains 'Test Group', which is highlighted with a blue border. A callout bubble with the text 'Click to select a group' points to this item. At the bottom of the dialog are 'Done', 'Cancel', and 'Clear Selection' buttons. At the very bottom of the page, there's a footer with copyright information and a timestamp.

Slide notes

Select the Group you just created, ...

Slide 39 - Slide 39

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and has tabs for USERS, GROUPS, and DEPARTMENTS. Under the USERS tab, there's a table with columns 'No.', 'User ID or Name', and 'Email'. The table lists 15 users from 1 to 15. The 'GROUPS' tab is active, showing a list of groups: None, Imported user, and Imported user. A modal window titled 'Click Done' is overlaid on the 'Add User' dialog, pointing to the 'Done' button.

Slide notes

...then click **Done**.

Slide 40 - Slide 40

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and has tabs for USERS, GROUPS, and DEPARTMENT. The USERS tab is selected, showing a list of 15 users with their email addresses. A modal window titled 'Add User' is open in the center. The 'USER' section contains fields for 'User ID' (set to 'Test_User') and 'User Display Name' (set to 'Test_User'). Under 'Groups', 'Test_Group' is selected. The 'Department' section shows 'NONE' selected in a dropdown menu. A callout bubble with the text 'Click in the Department field' points to this dropdown. Below these sections are fields for 'PASSWORD' (with 'Password' and 'Confirm Password' fields) and 'Temporary Authentication Email'. At the bottom of the modal are 'Save' and 'Cancel' buttons. In the background, a list of users is visible, and a sidebar on the right shows comments and imported users.

Slide notes

Select the Department association for this user from the Department drop-down list. Remember, a user can belong to only a single department.

Slide 41 - Slide 41

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and shows a list of users. A modal window titled 'Add User' is open. Inside the modal, there are fields for 'User ID' (set to 'Test_User'), 'User Display Name' (set to 'Test_User'), 'Groups' (set to 'Test_Group'), 'Department' (set to 'NONE'), 'Password', 'Confirm Password', and 'Temporary Authentication Email'. A callout bubble with the text 'Click to select the correct department' points to the 'Department' dropdown menu, which is currently open and displays a search bar and a list of departments. One department, 'Test_Department', is highlighted with a blue border. At the bottom of the modal are 'Save' and 'Cancel' buttons.

Slide notes

Select the Department you just created.

Slide 42 - Slide 42

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS, and DEPARTMENTS, with 'USERS' selected. A modal window titled 'Add User' is open. In the 'USER' section, the 'User ID' field contains 'Test_User' and the 'Groups' dropdown is set to 'Test_Group'. The 'Comments' field is empty. In the 'PASSWORD' section, a callout box says 'Type "Password-1@" and hit enter'. Below the fields are 'Save' and 'Cancel' buttons. In the background, a list of users is visible, and the bottom right corner shows a blue circular icon with a white 'L' and the number '6'.

Slide notes

Enter and confirm the user **Password**.

Slide 43 - Slide 43

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS, and DEPARTMENTS, with 'USERS' selected. A modal window titled 'Add User' is open. In the 'USER' section, the 'User ID' field contains 'Test_User' and the 'Groups' dropdown is set to 'Test_Group'. The 'Comments' field is empty. In the 'PASSWORD' section, the 'Password' field contains '*****' and the 'Confirm Password' field is empty. A callout box points to the 'Password' field with the text 'Type "Password-1@" and hit enter'. At the bottom of the modal are 'Save' and 'Cancel' buttons. The background shows a list of users with their email addresses.

Slide notes

Slide 44 - Slide 44

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS, and DEPARTMENTS, with 'USERS' selected. A sub-menu under 'USERS' includes 'Add User', 'Download', and 'Import'. Below this is a table listing users from 1 to 15, each with an email address starting with 'admin'. A modal window titled 'Add User' is open in the center. It contains fields for 'User ID' (set to 'Test_User' and '@ training.safemarch.com'), 'User Display Name' (set to 'Test_User'), 'Groups' (set to 'Test_Group'), 'Department' (set to 'Test_Department'), and a 'Comments' section which is currently empty. Below these are sections for 'PASSWORD' (with 'Password' and 'Confirm Password' fields both containing '*****') and 'Temporary Authentication Email' (which is empty). At the bottom of the modal are 'Save' and 'Cancel' buttons. A tooltip message 'Type "test_user@training.safemarch.com" and hit enter' is displayed over the 'Temporary Authentication Email' field. In the background, a list of users is visible, with several entries labeled 'Imported user'.

Slide notes

Last, enter a **Temporary Authentication Email** address. This is used in conjunction with the **One Time Token** or **One Time Link** feature to allow a user to recover their own password if lost or forgotten. This can be the same as the **User ID** or a different email address all together.

Slide 45 - Slide 45

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area has tabs for USERS, GROUPS, and DEPARTMENTS, with 'USERS' selected. A modal window titled 'Add User' is open. In the 'USER' section, 'User ID' is set to 'Test_User' and 'training.safemarch.com'. 'User Display Name' is 'Test_User' and 'Groups' is 'Test_Group'. 'Department' is 'Test_Department'. The 'Comments' field is empty. In the 'PASSWORD' section, 'Password' and 'Confirm Password' fields both contain '*****'. Below this, there's a note about temporary authentication email and a field for it. At the bottom of the modal, there are 'SAVE' and 'Cancel' buttons. A callout bubble points to the 'SAVE' button with the text 'Click Save'. The background shows a list of users with their names and email addresses.

Slide notes

Click Save.

Slide 46 - Slide 46

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration (selected), Activation, and Search. The main area is titled "User Management" and shows a message "All changes have been saved." Below this is a navigation bar with tabs: USERS (selected), GROUPS, and DEPARTMENTS. Underneath are buttons for Add User, Download, Import, and Sample Import CSV file. A search bar at the top right includes fields for "User ID or Name" and "Search...". The main content is a table with 15 rows of user data:

No.	User ID or Name	User Display Name	Groups	Department	Comments	Action
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

At the bottom of the interface, there is a footer with copyright information: "Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents" and a timestamp: "Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM".

Slide notes

Slide 47 - Slide 47

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration (selected), Activation (with a red notification badge), and Search. The main area is titled "User Management" and has tabs for USERS, GROUPS (selected), and DEPARTMENTS. Below the tabs are buttons for Add User, Download, Import, and Sample Import CSV file. There is also a search bar with "User ID or Name" and "Search..." placeholder text. The main content is a table with columns: No., User ID or Name, User Display Name, Groups, Department, Comments, and an edit icon. The table contains 15 rows of user data. A callout bubble with the text "Click Activation" points to the last column of the table.

No.	User ID or Name	User Display Name	Groups	Department	Comments	Activation
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin16@training.safemarch.com	admin16	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

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Slide notes

Once you have created your Groups, Departments, and Users be sure to **Activate** your changes.

Slide 48 - Slide 48

The screenshot shows the Zscaler Admin interface with the 'Activation' module selected. On the left, there's a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation (with 1 notification), Search, and Help. The main area has tabs for 'DEPARTMENTS' and 'USERS'. Under 'DEPARTMENTS', there are buttons for 'Import' and 'Sample Import CSV file'. A search bar at the top right allows searching by 'User ID or Name' and includes a magnifying glass icon. The main table lists users with columns for 'User Display Name', 'Groups', 'Department', and 'Comments'. A specific row for user 'admin1' is highlighted with a blue border. To the left of this row, a large callout box contains the text 'Click Activate' and points to the 'Activate' button in the row's action column. The bottom of the screen shows copyright information and a timestamp.

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Slide notes

Slide 49 - Slide 49

The screenshot shows the 'User Management' page of the Zscaler interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has a title 'User Management' and a message 'Activation Completed!' with a close button. Below this is a navigation bar with tabs for 'USERS' (selected), 'GROUPS', and 'DEPARTMENTS'. Underneath are buttons for 'Add User', 'Download', 'Import', and 'Sample Import CSV file'. A search bar with placeholder 'User ID or Name' and a search icon is also present. The main content is a table with columns: No., User ID or Name, User Display Name, Groups, Department, Comments, and an edit icon. The table contains 15 rows of user data. At the bottom right of the table is a blue circular icon with a white 'R' and a count of '0'.

No.	User ID or Name	User Display Name	Groups	Department	Comments	
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

Slide notes

Slide 50 - Slide 50

The screenshot shows the Zscaler Admin Portal's User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Add User", "Download", "Import", and a "Sample CSV file" link. A callout box points to the "Sample CSV file" link with the text "Click Sample Import CSV File". The main content area is a table with columns: No., User ID or Name, Display Name, Groups, Department, and Comments. The table contains 15 rows of user data. At the bottom right of the table is a blue circular icon with a white question mark.

No.	User ID or Name	Display Name	Groups	Department	Comments
1	aaron.ahmed@training.safemarch.com		users, ipad, Streaming	Sales Enginee...	Imported user
2	adam.ashcroft@training.safemarch.com		ad, Tech	Engineering	Imported user
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---
10	admin2@training.safemarch.com	admin2	---	---	---
11	admin3@training.safemarch.com	admin3	---	---	---
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---

Slide notes

Now that you have seen how to manually create Users, Groups, and Departments via the Admin Portal let's take a look and expediting the process for a larger group of users using the CSV import function. While still under the **Administration** tab, and **User Management**, begin by downloading a sample CSV file by clicking on the **Sample Import CSV file** link.

This sample file will be used as your template to build your user-list in an Excel file then save it in CSV format. The proper format must be used otherwise when you try to import the file it will fail.

Slide 51 - Slide 51

The screenshot shows the Zscaler User Management interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, Search, and Help. The main area is titled 'User Management' and has tabs for 'USERS', 'GROUPS' (which is selected), and 'DEPARTMENTS'. Below the tabs are buttons for '+ Add User', 'Download', 'Import', and 'Sample Import CSV file'. There is also a search bar with 'User ID or Name' and 'Search...' placeholder text. A magnifying glass icon is at the end of the search bar. The main content is a table with columns: No., User ID or Name, User Display Name, Groups, Department, and Comments. The table contains 13 rows of user data. A callout bubble with the text 'Click to open the file' points to the 'Import' button.

No.	User ID or Name	User Display Name	Groups	Department	Comments
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---
10	admin2@training.safemarch.com	admin2	---	---	---
11	admin3@training.safemarch.com	admin3	---	---	---
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---
13	.com	admin5	Service Admin	Service Admin	---

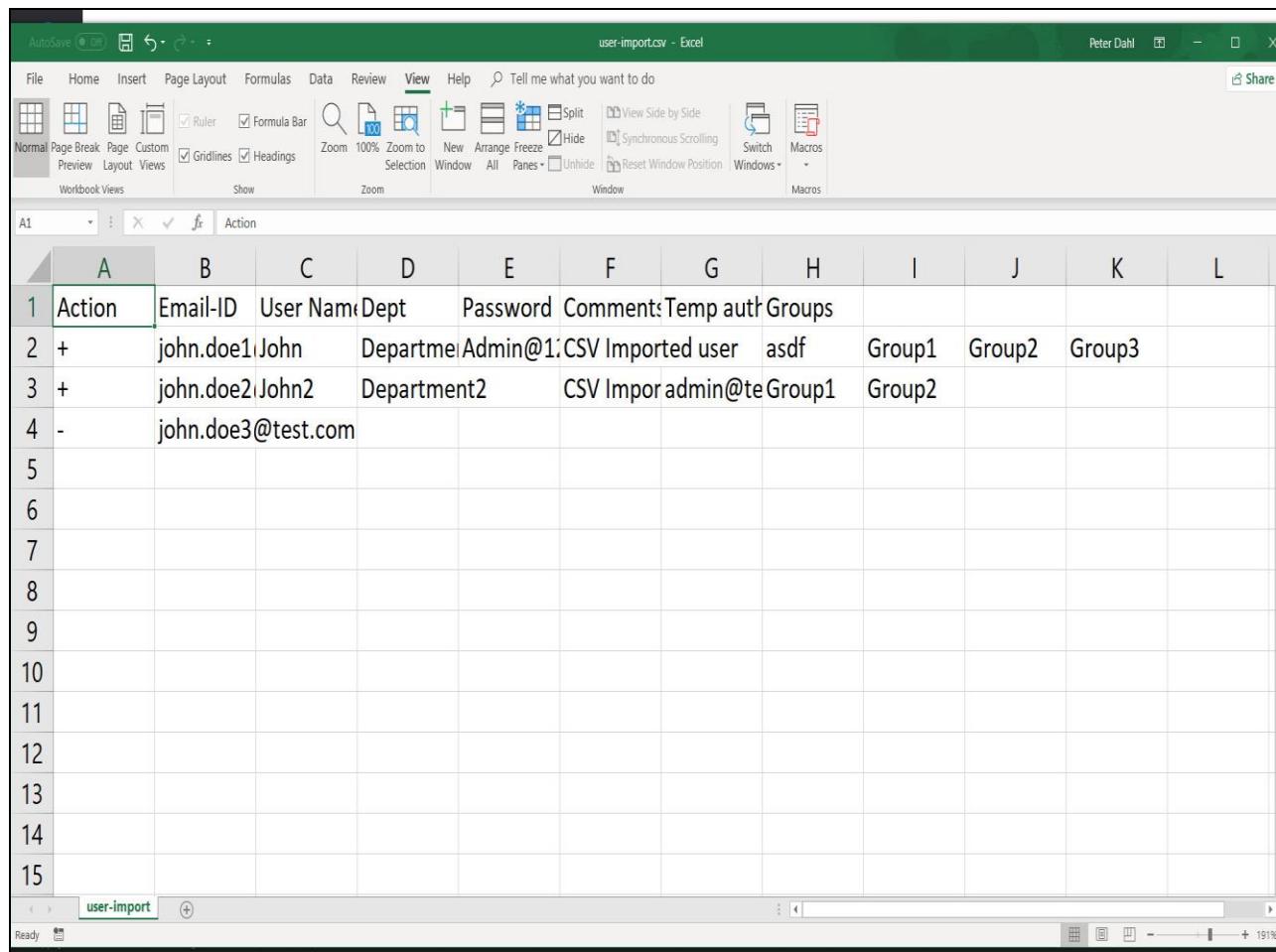
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Show all X

Slide notes

Slide 52 - Slide 52



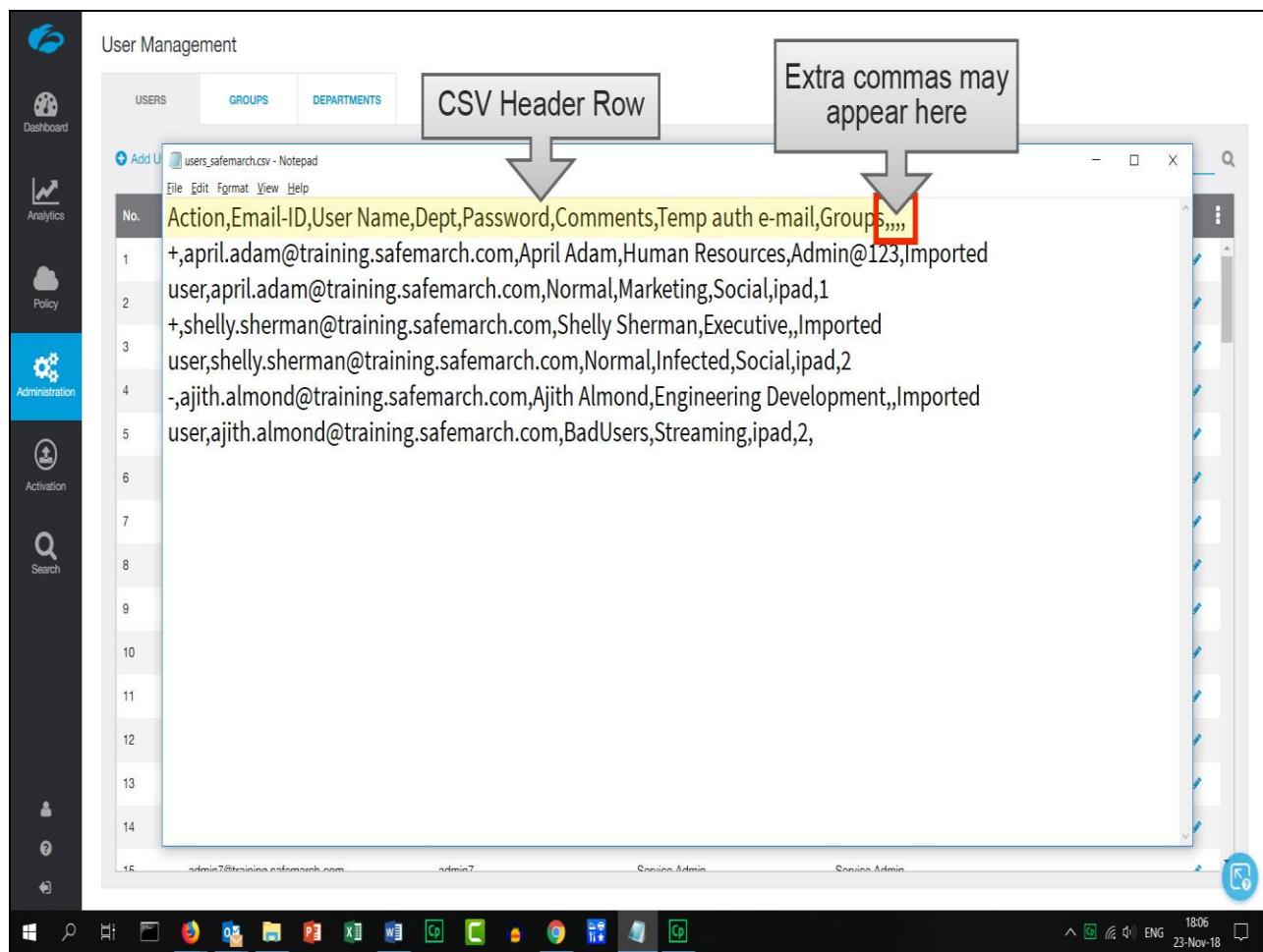
The screenshot shows a Microsoft Excel spreadsheet titled "user-import.csv - Excel". The data is organized into columns:

	Action	Email-ID	User Name	Dept	Password	Comment	Temp auth	Groups			
1	+	john.doe1	John	Department1	Admin@1:CSV Imported user	asdf		Group1	Group2	Group3	
2	+	john.doe2	John2	Department2	CSV Impor	admin@te	Group1	Group2			
3	-	john.doe3@test.com									
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											

Slide notes

The sample CSV file will look similar to this when viewed in Excel.

Slide 53 - Slide 53



Slide notes

And this is the file when viewed in Notepad. Please note that Excel has a tendency to add extra commas at the end of the header after **Groups**. If you see these extra commas, delete them otherwise when you try to import the file it will fail. These commas will cause an import error and must be deleted.

Slide 54 - Slide 54

The screenshot shows the 'User Management' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS (which is selected), and DEPARTMENTS. Below the tabs are buttons for 'Add User', 'Download', and 'Import CSV file'. A callout bubble with the text 'Click Import' points to the 'Import CSV file' button. The main table lists 15 users with columns for No., User ID or Name, User Display Name, Groups, Department, and Comments. At the bottom right of the table is a blue circular icon with a white question mark.

No.	User ID or Name	User Display Name	Groups	Department	Comments
1	aaron.ahmed@training.safemarch.com		2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---
10	admin2@training.safemarch.com	admin2	---	---	---
11	admin3@training.safemarch.com	admin3	---	---	---
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---

Slide notes

Once you have a completed CSV file containing all of your Users, their Groups, and Departments, click **Import**.

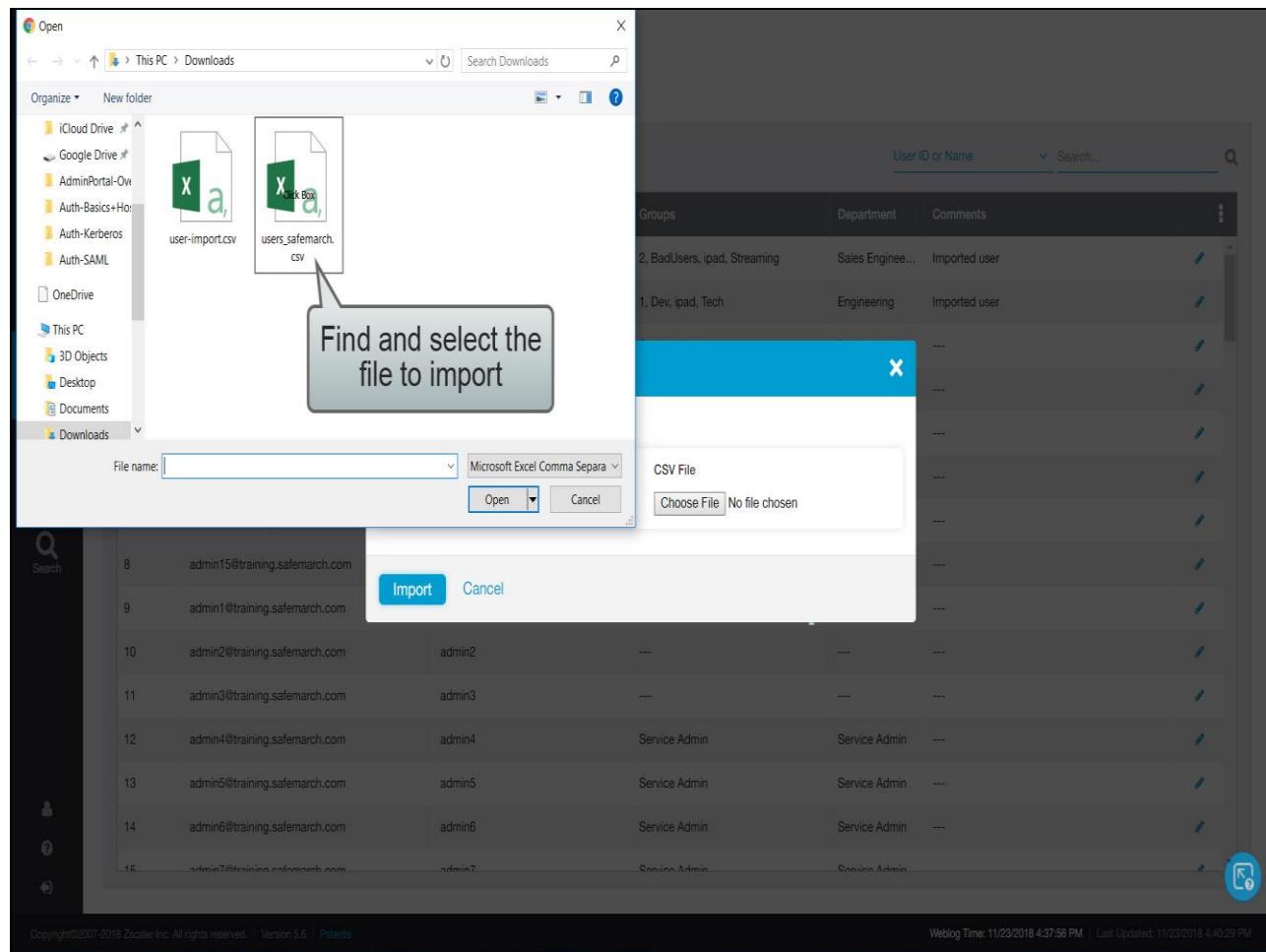
Slide 55 - Slide 55

The screenshot shows the Zscaler User Management interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'User Management' and has tabs for 'USERS', 'GROUPS' (which is selected), and 'DEPARTMENTS'. Below the tabs are buttons for 'Add User', 'Download', 'Import', and 'Sample Import CSV file'. A search bar at the top right includes 'User ID or Name' and 'Search...'. The main content area displays a table of users with columns: No., User ID or Name, User Display Name, Groups, Department, and Comments. A modal window titled 'Import Users' is open over the table. It has a checkbox for 'Override Existing Entries' and a 'CSV File' input field with a 'Choose File' button. A callout bubble with the text 'Click Choose File' points to the 'Choose File' button. At the bottom of the modal are 'Import' and 'Cancel' buttons.

Slide notes

You may choose to overwrite existing entries or import the new entries in addition to those that already exist. Click **Choose File**, ...

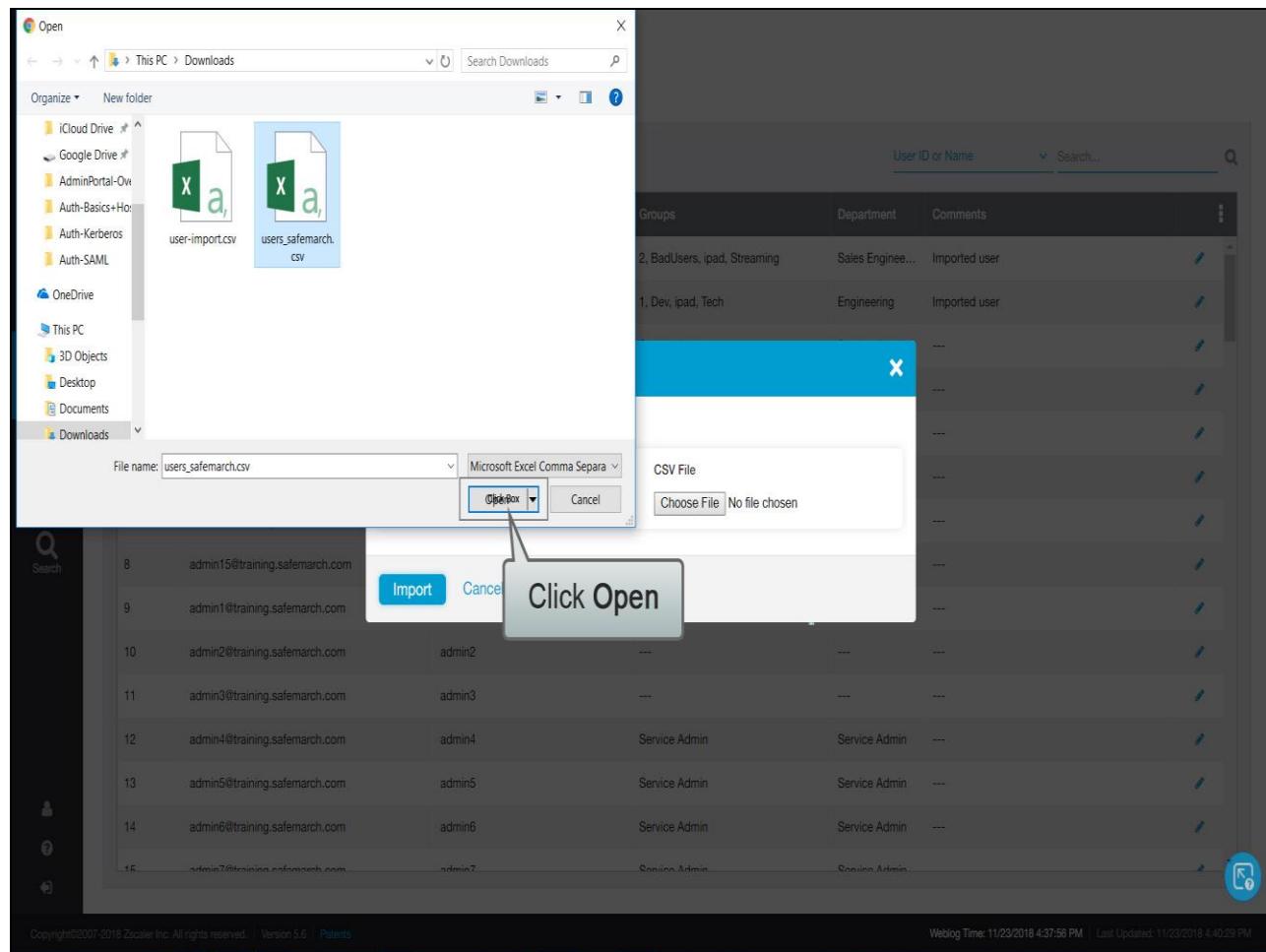
Slide 56 - Slide 56



Slide notes

...point to your file, ...

Slide 57 - Slide 57



Slide notes

...then click **Open**.

Slide 58 - Slide 58

The screenshot shows the Zscaler User Management interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Add User", "Download", "Import", and "Sample Import CSV file". A search bar at the top right includes fields for "User ID or Name" and "Search...". The main table lists users with columns for No., User ID or Name, User Display Name, Groups, Department, and Comments. A modal dialog box titled "Import Users" is open over the table. It contains sections for "IMPORT USERS", "Override Existing Entries" (with a checkbox checked), and "CSV File" (with a "Choose File" button and the path "users_safemarch.csv"). At the bottom of the dialog are "Import" and "Cancel" buttons. A callout bubble with the text "Click Import" points to the "Import" button. The footer of the page includes copyright information ("Copyright © 2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Policies") and a timestamp ("Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM").

Slide notes

Then click **Import**.

Slide 59 - Slide 59

The screenshot shows the Zscaler User Management interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS (which is selected), and DEPARTMENTS. Below the tabs are buttons for Add User, Download, Import, and Sample Import CSV file. A search bar at the top right includes fields for UserID or Name and Search... A message box at the top right says "CSV File Import Completed". The main table lists users with columns for No., User ID or Name, User Display Name, Groups, Department, and Comments. An "Import Users" modal window is open, titled "Import Results". It contains a table with two rows: "Status" (Complete) and "Processed Records" (0). Another row shows "Total Records Added" (2) and "Total Records Deleted" (1). A third row shows "Total Records In Import" (3) and "Total Records Updated" (0). At the bottom of the modal is a "Close" button. The footer of the page includes copyright information (Copyright © 2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Policies) and a timestamp (Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM).

Slide notes

Slide 60 - Slide 60

The screenshot shows the Zscaler User Management interface. On the left, there's a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Add User", "Download", "Import", and "Sample Import CSV file". A search bar at the top right includes fields for "User ID or Name" and "Search...". The main table lists users with columns for No., User ID or Name, User Display Name, Groups, Department, and Comments. An "Import Users" dialog box is overlaid on the page, titled "IMPORT RESULTS". It contains a table with the following data:

Status	Processed Records
Complete	0
Total Records Added	Total Records Deleted
2	1
Total Records In Import	Total Records Updated
3	0

A callout bubble with the text "Click Box" points to the "Close" button in the bottom-left corner of the dialog. At the bottom of the page, there's a copyright notice: "Copyright© 2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Policies" and a timestamp: "Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM".

Slide notes

You will now see the results of the import and see that new records have been added. Click **Close**.

Slide 61 - Slide 61

The screenshot shows the Zscaler User Management interface. On the left, there is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Add User", "Download", "Import", and "Sample Import CSV file". There is also a search bar with placeholder text "User ID or Name" and a "Search..." button. The main content is a table with columns: No., User ID or Name, User Display Name, Groups, Department, Comments, and an edit icon. The table contains 15 rows of user data. A callout bubble with the text "Click Activation" points to the last column of the table.

No.	User ID or Name	User Display Name	Groups	Department	Comments	Activation
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin16@training.safemarch.com	admin16	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

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Slide notes

Slide 62 - Slide 62

The screenshot shows the Zscaler Admin interface with the 'Activation' tab selected. On the left, there's a sidebar with various icons for Dashboard, Analytics, Policy, Administration, Activation (with 1 notification), Search, and Help. The main area is titled 'DEPARTMENTS' and shows a table of users. A callout box with the text 'Click Activate' points to the 'Activate' button for the user 'admin1'. The user table data is as follows:

User Display Name	Groups	Department	Comments
Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user
Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user
admin10	Service Admin	Service Admin	---
admin11	Service Admin	Service Admin	---
admin12	Service Admin	Service Admin	---
admin13	Service Admin	Service Admin	---
admin14	Service Admin	Service Admin	---
admin15	Service Admin	Service Admin	---
admin1	Service Admin	Service Admin	---
admin2	---	---	---
admin3	---	---	---
admin4	Service Admin	Service Admin	---
admin5	Service Admin	Service Admin	---
admin6	Service Admin	Service Admin	---
admin7	Service Admin	Service Admin	---

At the bottom, it says 'Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents' and 'Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM'.

Slide notes

Slide 63 - Slide 63

The screenshot shows the 'User Management' page of the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for USERS, GROUPS (selected), and DEPARTMENTS. A message 'Activation Completed!' is displayed at the top right. Below is a table with columns: No., User ID or Name, User Display Name, Groups, Department, Comments, and an edit icon. The table lists 15 users, mostly named 'admin' followed by a number, with their respective email addresses and department assignments.

No.	User ID or Name	User Display Name	Groups	Department	Comments	Edit
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

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Slide notes

Slide 64 - Slide 64

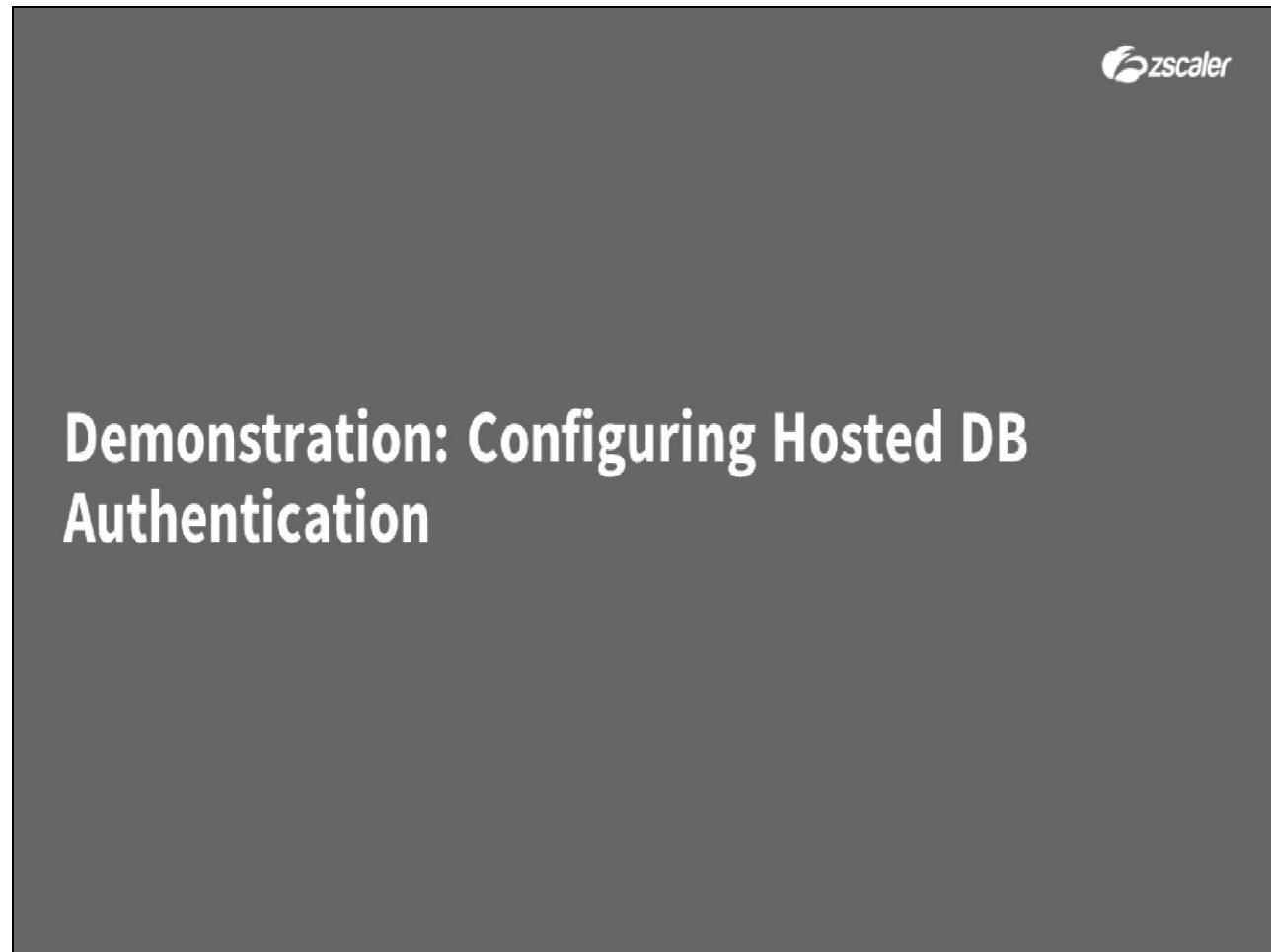
The screenshot shows the Zscaler User Management interface. On the left, a vertical sidebar displays icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled "User Management" and has tabs for "USERS", "GROUPS" (which is selected), and "DEPARTMENTS". Below the tabs are buttons for "Add User", "Download", "Import", and "Sample Import CSV file". A search bar at the top right includes fields for "User ID or Name" and "Search...". The main content is a table with 15 rows of user data:

No.	User ID or Name	User Display Name	Groups	Department	Comments	Action
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---	
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---	
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---	
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---	
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---	
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---	
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---	
10	admin2@training.safemarch.com	admin2	---	---	---	
11	admin3@training.safemarch.com	admin3	---	---	---	
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---	
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---	
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---	
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---	

At the bottom of the interface, there is a footer with copyright information and a timestamp: "Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents" and "Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM".

Slide notes

Slide 65 - Hosted DB plus optional One-Time Link / One-Time Token



Slide notes

Slide 66 - Slide 66

The screenshot shows the Zscaler User Management interface. On the left, a vertical sidebar contains icons for Dashboard, Analytics, Policy, Administration (which is highlighted in blue), Activation, Search, and Help. The main area is titled "User Management" and has tabs for USERS, GROUPS (which is selected and highlighted in blue), and DEPARTMENTS. Below the tabs are buttons for Add User, Download, Import, and Sample Import CSV file. There is also a search bar with fields for "User ID or Name" and "Search...". The main content area is a table with columns: No., User ID or Name, User Display Name, Groups, Department, and Comments. The table lists 15 users, mostly named "admin" followed by a number, with their respective details like email addresses, display names, group memberships (e.g., 2, BadUsers, ipad, Streaming; 1, Dev, ipad, Tech), departments (e.g., Sales Engineer, Engineering, Service Admin), and comments (e.g., Imported user, ---). Each row has an edit icon in the last column.

No.	User ID or Name	User Display Name	Groups	Department	Comments
1	aaron.ahmed@training.safemarch.com	Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user
2	adam.ashcroft@training.safemarch.com	Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user
3	admin10@training.safemarch.com	admin10	Service Admin	Service Admin	---
4	admin11@training.safemarch.com	admin11	Service Admin	Service Admin	---
5	admin12@training.safemarch.com	admin12	Service Admin	Service Admin	---
6	admin13@training.safemarch.com	admin13	Service Admin	Service Admin	---
7	admin14@training.safemarch.com	admin14	Service Admin	Service Admin	---
8	admin15@training.safemarch.com	admin15	Service Admin	Service Admin	---
9	admin1@training.safemarch.com	admin1	Service Admin	Service Admin	---
10	admin2@training.safemarch.com	admin2	---	---	---
11	admin3@training.safemarch.com	admin3	---	---	---
12	admin4@training.safemarch.com	admin4	Service Admin	Service Admin	---
13	admin5@training.safemarch.com	admin5	Service Admin	Service Admin	---
14	admin6@training.safemarch.com	admin6	Service Admin	Service Admin	---
15	admin7@training.safemarch.com	admin7	Service Admin	Service Admin	---

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Slide notes

The Hosted Database feature in the Zscaler service is typically deployed only for small deployments or Proof of Concept testing where an external authentication scheme such as SAML or LDAP are not available. With these external authentication schemes the Users, Groups, Departments, and passwords would reside on servers outside of Zscaler. User information, however, would be automatically synchronized with the Zscaler service.

To configure your organization to use the Hosted DB click on the **Administration** tab, ...

Slide 67 - Slide 67

The screenshot shows the Zscaler Admin UI. On the left, there's a navigation sidebar with various icons and sections like Dashboard, Analytics, Policy, Administration, Activation, Search, and Resources. The 'Administration' section is currently selected. Within 'Administration', there are three main tabs: 'Authentication Configuration' (selected), 'Administrator Management', and 'Role Management'. A callout bubble points to the 'Authentication Configuration' tab with the text 'Click Authentication Settings'. The main content area shows a table of users with columns for User Display Name, Groups, Department, and Comments. At the top of this table, there are buttons for 'Import CSV file' and search fields for 'User ID or Name' and 'Search...'. The table contains 15 rows of user data.

User Display Name	Groups	Department	Comments	Action
Aaron Ahmed	2, BadUsers, ipad, Streaming	Sales Enginee...	Imported user	Edit
Adam Ashcroft	1, Dev, ipad, Tech	Engineering	Imported user	Edit
admin10	Service Admin	Service Admin	---	Edit
admin11	Service Admin	Service Admin	---	Edit
admin12	Service Admin	Service Admin	---	Edit
admin13	Service Admin	Service Admin	---	Edit
admin14	Service Admin	Service Admin	---	Edit
admin15	Service Admin	Service Admin	---	Edit
admin1	Service Admin	Service Admin	---	Edit
admin2	---	---	---	Edit
admin3	---	---	---	Edit
admin4	Service Admin	Service Admin	---	Edit
admin5	Service Admin	Service Admin	---	Edit
admin6	Service Admin	Service Admin	---	Edit
admin7	Service Admin	Service Admin	---	Edit

Slide notes

...then click on **Authentication Settings**.

Slide 68 - Slide 68

The screenshot shows the Zscaler Authentication Settings interface. On the left, there's a sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area is titled 'Authentication Settings' and has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', settings include 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Daily), 'Authentication Type' (Form-Based selected), 'Temporary Authentication' (Disabled selected), 'Password Strength' (None), and 'Password expiry' (Never). An 'OK' button is highlighted with a callout 'Click OK'. A modal dialog titled 'Alert' displays the message: 'We strongly recommend setting the Password Strength higher. Weak passwords can be very easily compromised.' At the bottom, there are 'Save' and 'Cancel' buttons.

Slide notes

Slide 69 - Slide 69

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there's a section for 'Directory-Type' with three options: 'Hosted DB' (selected), 'Active Directory', and 'OpenLDAP'. A large callout box with the text 'Click Hosted DB' points to the 'Hosted DB' button. Below this are sections for 'Authentication Frequency' (set to 'Daily'), 'Authentication Type' (set to 'Form-Based'), and 'Temporary Authentication' (set to 'Disabled'). There are also fields for 'Password Strength' (set to 'None') and 'Password expiry' (set to 'Never'). Under 'KERBEROS AUTHENTICATION', the 'Enable Kerberos' checkbox is unchecked. At the bottom are 'Save' and 'Cancel' buttons, and a blue circular icon with a white 'X'.

Slide notes

For the Directory Type click on **Hosted DB**.

Slide 70 - Slide 70

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there's a section for 'Directory Type' with 'Hosted DB' selected. The 'Authentication Frequency' dropdown is open, showing 'Daily' (selected), 'Click Box', and 'Click Here'. Other sections include 'Authentication Type' (with 'For every user' checked), 'Temporary Session' (disabled), 'Password Strength' (None), and 'Password expiry' (Never). At the bottom, there's a 'KERBEROS AUTHENTICATION' section with an 'Enable Kerberos' checkbox (unchecked) and buttons for 'Save' and 'Cancel'.

Slide notes

Set the desired **Authentication Frequency** which determines how often the user must re-authenticate.

Slide 71 - Slide 71

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical navigation bar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there's a 'Directory Type' section with 'Hosted DB' selected. Below that is an 'Authentication Frequency' dropdown set to 'Daily', which is expanded to show options: 'Only Once' (highlighted with a callout box), 'Click Box', 'Once Per Session', 'Custom', and 'Disabled'. Other sections include 'Password Strength' (set to 'None') and 'Password expiry' (set to 'Never'). Under 'KERBEROS AUTHENTICATION', there's a checkbox for 'Enable Kerberos' which is unchecked. At the bottom are 'Save' and 'Cancel' buttons, and a blue circular icon with a white 'X'.

Slide notes

Slide 72 - Slide 72

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical navigation bar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there are sections for 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected, highlighted with a gray box and a callout 'Click Forms-Based'), 'Temporary Authentication' (Disabled), 'Password Sync' (None), and 'Password expiry' (Never). Below this is a 'KERBEROS AUTHENTICATION' section with an 'Enable Kerberos' checkbox (unchecked). At the bottom are 'Save' and 'Cancel' buttons, and a blue circular icon with a white 'i'.

Slide notes

Set **Form Based**.

Slide 73 - Slide 73

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there are sections for 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), and 'Temporary Authentication' (One-Time Token selected). A callout bubble points to the 'One-Time Token' option with the text 'Click One Time Token'. Below this are sections for 'PASSWORD STRENGTH' (None) and 'PASSWORD EXPIRY' (Never). At the bottom is a 'KERBEROS AUTHENTICATION' section with an 'Enable Kerberos' checkbox (unchecked). At the very bottom are 'Save' and 'Cancel' buttons.

Slide notes

Optionally, enable **One-Time Token** or **One-Time Link**, ...

Slide 74 - Slide 74

The screenshot shows the 'Authentication Settings' page with the 'AUTHENTICATION PROFILE' tab selected. The 'Directory Type' is set to 'Hosted DB'. The 'Authentication Frequency' is set to 'Only Once'. The 'Authentication Type' is set to 'Form-Based'. Under 'Temporary Authentication', 'One-Time Token' is selected. In the 'Password Strength' section, a dropdown menu is open, showing 'None' and 'Click Box' as options. A callout box with the text 'Click in the Password Strength field' points to the 'Click Box' option. At the bottom, there is a 'Save' button.

Slide notes

Slide 75 - Slide 75

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there are sections for 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), and 'Temporary Authentication' (One-Time Token selected). A dropdown menu for 'Password Strength' is open, showing 'None' (selected), 'Medium', and 'Strong'. A callout box points to the 'Medium' option with the text 'Click Medium'. Below this is a 'KERBEROS AUTHEN...' section with an 'Enable Kerberos' toggle switch (disabled). At the bottom are 'Save' and 'Cancel' buttons.

Slide notes

...and choose how complex a password to enforce. You can choose: **None** which allows as simple a password as desired (not recommended); **Medium** which requires a minimum of 8 characters one of which must be a non-alphabetic character; or **Strong** which requires a minimum of 8 characters and must include at least one number, one upper case character, and one special character.

Slide 76 - Slide 76

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there are sections for 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), 'Temporary Authentication' (One-Time Token selected), 'Password Strength' (Medium), and 'Password expiry' (set to Never). A callout box points to the 'Never' option with the text 'Click in the Password expiry field'. Below these settings are sections for 'KERBEROS AUTH' (Enable Kerberos is off) and 'SAML AUTH'. At the bottom are 'Save' and 'Cancel' buttons.

Slide notes

Last, choose the **Password expiry** time.

Slide 77 - Slide 77

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', the 'Directory Type' is set to 'Hosted DB'. 'Authentication Frequency' is set to 'Only Once'. 'Authentication Type' is set to 'Form-Based'. Under 'Temporary Authentication', 'One-Time Token' is selected. In the 'Password Strength' section, 'Medium' is selected. The 'Password expiry' section shows a dropdown menu with options: 'Never', '1 Month' (which is highlighted with a red border and a callout bubble saying 'Click 1 Month'), '3 Months', and '6 Months'. At the bottom are 'Save' and 'Cancel' buttons.

Slide notes

Slide 78 - Slide 78

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left is a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area is titled 'Authentication Settings' and has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there are sections for 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), 'Temporary Authentication' (One-Time Token selected), 'Password Strength' (Medium), and 'Password expiry' (1 Month). Below this is a 'KERBEROS AUTHENTICATION' section with an 'Enable' checkbox (unchecked) and a 'Save' button. A callout bubble points to the 'Save' button with the text 'Click Save'. At the bottom of the page, there is copyright information (Copyright © 2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents) and a timestamp (Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM).

Slide notes

Click **Save**.

Slide 79 - Slide 79

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. The left sidebar has icons for Dashboard, Analytics, Policy, Administration (with 1 notification), Activation, and Search. The main content area has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. A message bar at the top says 'All changes have been saved.' A close button 'X' is in the top right corner of the message bar.

AUTHENTICATION PROFILE

Directory Type: Hosted DB Active Directory OpenLDAP

Authentication Frequency: Only Once

Authentication Type: Form-Based SAML

Temporary Authentication: Disabled One-Time Token One-Time Link [Send Authentication Email](#)

Password Strength: Medium

Password expiry: 1 Month

KERBEROS AUTHENTICATION

Enable Kerberos:

Buttons: Save, Cancel,

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Slide notes

Slide 80 - Slide 80

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area is titled 'Authentication Settings' and has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', there are sections for 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), and 'Temporary Authentication' (One-Time Token selected). A large, semi-transparent callout box labeled 'Click Activation' is overlaid on the temporary authentication section. Below this, there's a 'Password Strength' dropdown set to '1 Month'. Under 'KERBEROS AUTHENTICATION', there's a 'Enable Kerberos' checkbox which is unchecked. At the bottom, there are 'Save' and 'Cancel' buttons, and a small circular icon with a checkmark.

Slide notes

Activate your changes.

Slide 81 - Slide 81

The screenshot shows the Zscaler Admin UI interface. On the left is a dark sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation (which is selected and has a red notification badge), and Search. The main content area has a light background. At the top, it says "MY ACTIVATION STATUS" and "Editing". Below that, "CURRENTLY EDITING (1)" shows "admin@training-safemarth.com". Under "QUEUED ACTIVATIONS (0)", it says "None". There are two buttons: "ActiveBox" (highlighted with a blue box and a callout "Click Activate") and "OpenLDAP". A "Force Activate" checkbox is also present. In the center, there's a "Token" tab selected, showing a "Send Authentication Email" button. At the bottom right of the main area is a blue circular icon with a white "X". At the very bottom of the screen, there's a footer bar with "Copyright©2007-2018 Zscaler Inc. All rights reserved. | Version 5.6 | Patents" and "Weblog Time: 11/23/2018 4:37:56 PM | Last Updated: 11/23/2018 4:40:29 PM".

Slide notes

Slide 82 - Slide 82

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. A prominent message at the top says 'Activation Completed!'. The left sidebar has icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area is titled 'AUTHENTICATION PROFILE' and includes tabs for 'AUTHENTICATION PROFILE' and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', settings include 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), 'Temporary Authentication' (One-Time Token selected), 'Password Strength' (Medium), and 'Password expiry' (1 Month). Below this is a 'KERBEROS AUTHENTICATION' section with an 'Enable Kerberos' checkbox (unchecked). At the bottom are 'Save' and 'Cancel' buttons.

Slide notes

Slide 83 - Slide 83

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left, a vertical sidebar lists icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area is titled 'Authentication Settings' and has tabs for 'AUTHENTICATION PROFILE' (selected) and 'AUTHENTICATION BRIDGES'. Under 'AUTHENTICATION PROFILE', settings include:

- Directory Type:** Hosted DB (selected)
- Authentication Frequency:** Only Once
- Authentication Type:** Form-Based (selected)
- Temporary Authentication:** One-Time Token (selected)
- Password Strength:** Medium
- Password expiry:** 1 Month

Under 'KERBEROS AUTHENTICATION', the 'Enable Kerberos' checkbox is unchecked. At the bottom are 'Save' and 'Cancel' buttons.

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Slide notes

Slide 84 - Enabling User Authentication per Location



Slide notes

Slide 85 - Slide 85

The screenshot shows the 'Authentication Settings' page in the Zscaler interface. On the left, a vertical sidebar contains icons for Dashboard, Analytics, Policy, Administration (which is highlighted in blue), and Activation. The main content area has tabs for 'AUTHENTICATION PROFILE' and 'AUTHENTICATION BRIDGES', with 'AUTHENTICATION PROFILE' selected. Under 'AUTHENTICATION PROFILE', settings include 'Directory Type' (Hosted DB selected), 'Authentication Frequency' (Only Once), 'Authentication Type' (Form-Based selected), and options for 'One-Time Link' and 'Send Authentication Email'. Below this is a section for 'Temporary Authentication' with a dropdown set to 'Medium'. Under 'KERBEROS AUTHENTICATION', there is a checkbox for 'Enable Kerberos' which is unchecked. At the bottom are 'Save' and 'Cancel' buttons, and a small circular icon with a checkmark.

Click Administration

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Slide notes

Now that the Authentication method has been configured, we need to enable authentication for each location. To enable authentication, click the **Administration** tab.

Slide 86 - Slide 86

The screenshot shows the Zscaler Admin UI interface. On the left, there's a vertical sidebar with icons for Dashboard, Analytics, Policy, Administration, Activation, and Search. The main content area has several sections: 'ACCOUNT MANAGEMENT' (My Profile, Company Profile, Alerts, Print All Policies), 'CLOUD CONFIGURATION' (Nanolog Streaming Service, Advanced Settings, Virtual ZENS, ICAP Settings, Partner Integrations [NEW]), 'Authentication' (Authentication Configuration, Authentication Settings [selected], User Management, Identity Proxy Settings), 'Administration Controls' (Administrator Management, Role Management, Audit Logs [NEW], Backup & Restore), 'Send Authentication Email' (button), 'Resources' (Traffic Forwarding, Location [highlighted with a callout box labeled 'Click Locations'], VPN Credentials, Hosted Domains, eZ Agent, Secure Connect), 'Access Control' (URL Categories, Bandwidth Classes, Time Intervals), 'Firewall Filtering' (Network Services, Network Applications, IP & FQDN Groups), and 'Data Loss Prevention' (DLP Dictionaries & Engines, DLP Notification Templates). At the bottom, there's a footer with copyright information and a timestamp.

Slide notes

Then under Traffic Forwarding select **Locations**.

Slide 87 - Slide 87

The screenshot shows the Zscaler Administration interface with the 'Administration' tab selected in the sidebar. The main page displays a table of locations. The third row, which has a 'Click Box' callout pointing to its edit icon, represents a location named 'trainingsafemarch2 / Headquart...'. The callout box contains the text 'Click to edit a Location'.

No.	Name	IP Address...	Proxy Ports	X-Forwarded-For I...	Authentication	SSL	Firewall Filtering	Bandwidth	Group	⋮
1	trainingsafemarch1 / Headquart...	---	---	---	---	---	Enabled	---	---	
2	trainingsafemarch15 / Headqua...	---	---	---	---	---	Enabled	---	---	
3	trainingsafemarch2 / Headquart...	---	---	---	---	---	Enabled	---	---	Click Box

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Slide notes

Select the location you would like to enable authentication on then click on the **Edit** icon.

Slide 88 - Slide 88

The screenshot shows the Zscaler Admin UI with the 'Edit Location' dialog open. The location 'trainingsafemarch2 / Headquarters' is selected. The 'LOCATION' section includes fields for Name (trainingsafemarch2 / Headquarters), Country (United States), State/Province (America/Los Angeles), and Group (None). The 'ADDRESSING' section includes fields for Static IP Addresses (None) and Proxy Ports (None). The 'Virtual ZENS' section includes a field for VPN Credentials (sida19c4d3@riverbed-tme.riverbed.cc). The 'GATEWAY OPT' section includes fields for Virtual ZEN Clusters (None) and Enable XFF Forwarding (unchecked). The 'Enforce Authentication' checkbox is highlighted with a red border and a callout bubble containing the text 'Click to enable the Enforce Authentication option'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Slide notes

Then enable **Enforce Authentication** if it is not already enabled for this location.

Slide 89 - Slide 89

The screenshot shows the Zscaler Admin UI with the 'Edit Location' dialog open. The location being edited is 'trainingsafemarch2 / Headquarters'. The dialog has several sections:

- LOCATION:** Name is set to 'trainingsafemarch2 / Headquarters', Country is 'United States', and Time Zone is 'America/Los Angeles'.
- ADDRESSING:** Static IP Addresses, Proxy Ports, VPN Credentials (set to 'sida19c4d3@riverbed-tme.riverbed.cc'), Virtual ZENS, and Virtual ZEN Clusters are all set to 'None'.
- GATEWAY:** Enforce Authentication is checked, but the 'Enable IP Surrogate' checkbox is unchecked. A callout bubble with the text 'Click to enable the Enable IP Surrogate option if required' points to this checkbox.

At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background shows a sidebar with various icons and a list of locations and groups.

Slide notes

Slide 90 - Slide 90

The screenshot shows the Zscaler Admin UI with the 'Edit Location' dialog open. The location 'trainingsafemarch2 / Headquarters' is selected. The dialog has three main sections: LOCATION, ADDRESSING, and GATEWAY OPTIONS.

- LOCATION:** Name: trainingsafemarch2 / Headquarters, Country: United States, Time Zone: America/Los Angeles, Group: None.
- ADDRESSING:** Static IP Addresses: None, Proxy Ports: None, VPN Credentials: sida19c4d3@riverbed-tme.riverbed.cc, Virtual ZENS: None, Virtual ZEN Clusters: None.
- GATEWAY OPTIONS:** Enable XFF Forwarding: Off, Enforce Authentication: On, Idle Time to Disassociation: 8 Hours.

A callout bubble with the text "Click Save" points to the blue "Save" button at the bottom left of the dialog. Other buttons include "Cancel" and "Delete". The background shows a list of other locations and groups.

Slide notes

Then click **Save**.

Slide 91 - Slide 91

The screenshot shows the Zscaler Administration interface with the 'Administration' sidebar selected. The main panel displays the 'Locations' page, which lists three locations: 'trainingsafemarch1 / Headquart...', 'trainingsafemarch15 / Headqua...', and 'trainingsafemarch2 / Headquart...'. The table includes columns for No., Name, IP Address, Proxy Ports, X-Forwarded-For I..., Authentication, SSL, Firewall Filtering, Bandwidth, Group, and actions. A message at the top indicates 'All changes have been saved.'

No.	Name	IP Address...	Proxy Ports	X-Forwarded-For I...	Authentication	SSL	Firewall Filtering	Bandwidth	Group	Actions
1	trainingsafemarch1 / Headquart...	---	---	---	---	---	Enabled	---	---	Edit View
2	trainingsafemarch15 / Headqua...	---	---	---	---	---	Enabled	---	---	Edit View
3	trainingsafemarch2 / Headquart...	---	---	---	Enabled: IP Surrog...	---	Enabled	---	---	Edit View

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Slide notes

Slide 92 - Slide 92

The screenshot shows the Zscaler Administration interface with the 'Locations' page open. The left sidebar includes links for Dashboard, Analytics, Policy, Administration (which is selected), Activation (with a red notification badge), and Search. The main content area displays a table of locations with three entries:

No.	Name	IP Address...	Proxy Ports	X-Forwarded-For I...	Authentication	SSL	Firewall Filtering	Bandwidth	Group	Actions
1	trainingsafemarch1 / Headquart...	---	---	---	---	---	Enabled	---	---	Edit View
2	trainingsafemarch15 / Headqua...	---	---	---	---	---	Enabled	---	---	Edit View
3	trainingsafemarch2 / Headquart...	---	---	---	Enabled: IP Surrog...	---	Enabled	---	---	Edit View

A callout box with the text 'Click Activation' points to the Activation button in the bottom right corner of the sidebar.

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Slide notes

Remember to always **Activate** your changes.

Slide 93 - Slide 93

The screenshot shows the Zscaler Admin UI with the 'Activation' tab selected. On the left sidebar, there are several other tabs: Dashboard, Analytics, Policy, Administration, Activation (which is active), and Search. The main content area displays a table of activation status for various IP addresses. One row is highlighted with a blue background, and a large callout box with the text 'Click Activate' points to the 'Activate' button in the row's action column. The table columns include IP Address, Proxy Ports, X-Forwarded-For I..., Authentication, SSL, Firewall Filtering, Bandwidth, Group, and three icons for edit, delete, and refresh.

	IP Address...	Proxy Ports	X-Forwarded-For I...	Authentication	SSL	Firewall Filtering	Bandwidth	Group			
Headquart...	---	---	---	---	---	Enabled	---	---			
/ Headqua...	---	---	---	---	---	Enabled	---	---			
Headquart...	---	---	---	Enabled: IP Surrog...	---	Enabled	---	---			

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Slide notes

Slide 94 - Slide 94

The screenshot shows the Zscaler Administration interface with the 'Administration' sidebar selected. The main panel displays the 'Locations' page, which includes a header with 'Activation Completed!' and a search bar. Below the header is a toolbar with buttons for 'Add Location', 'Import Locations', 'Download...', 'Sample Im...', 'Enter Gro...', 'All Groups', and a search field. A table lists three locations with columns for No., Name, IP Address, Proxy Ports, X-Forwarded-For I..., Authentication, SSL, Firewall Filtering, Bandwidth, Group, and actions. The first two locations have 'Enabled' status, while the third has 'Enabled: IP Surrog...'. The bottom of the screen shows copyright information and a timestamp.

No.	Name	IP Address...	Proxy Ports	X-Forwarded-For I...	Authentication	SSL	Firewall Filtering	Bandwidth	Group	Actions
1	trainingsafemarch1 / Headquart...	---	---	---	---	---	Enabled	---	---	Edit Delete
2	trainingsafemarch15 / Headqua...	---	---	---	---	---	Enabled	---	---	Edit Delete
3	trainingsafemarch2 / Headquart...	---	---	---	Enabled: IP Surrog...	---	Enabled	---	---	Edit Delete

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Slide notes

Slide 95 - Slide 95

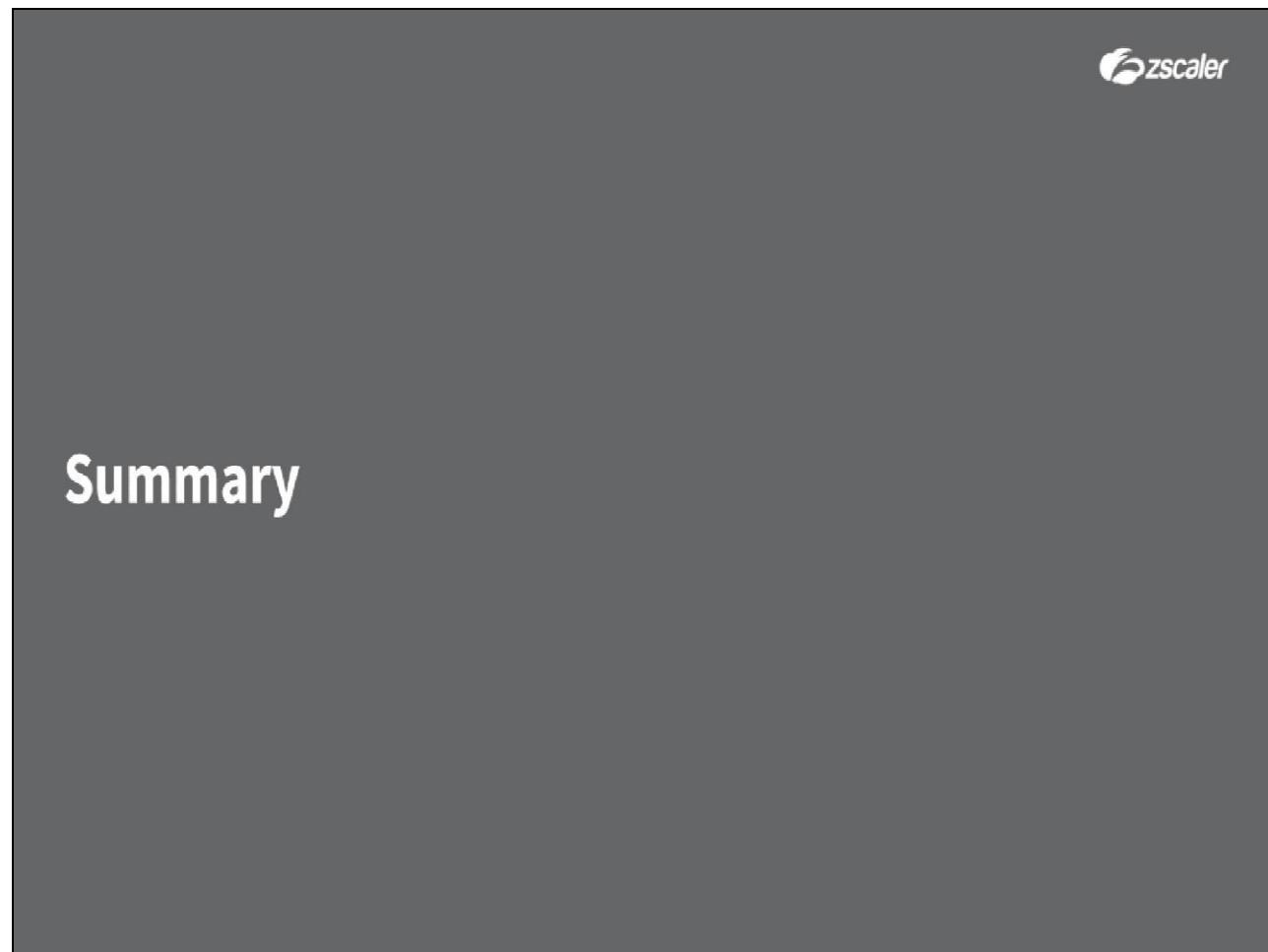
The screenshot shows the Zscaler Administration interface with the 'Administration' tab selected in the sidebar. The main page is titled 'Locations' and displays a table of three entries. The columns include No., Name, IP Address, Proxy Ports, X-Forwarded-For I..., Authentication, SSL, Firewall Filtering, Bandwidth, Group, and actions (Edit and Delete). The entries are:

No.	Name	IP Address...	Proxy Ports	X-Forwarded-For I...	Authentication	SSL	Firewall Filtering	Bandwidth	Group	Action
1	trainingsafemarch1 / Headqua...	---	---	---	---	---	Enabled	---	---	Edit Delete
2	trainingsafemarch15 / Headqua...	---	---	---	---	---	Enabled	---	---	Edit Delete
3	trainingsafemarch2 / Headqua...	---	---	---	Enabled: IP Surrog...	---	Enabled	---	---	Edit Delete

Below the table, there are buttons for 'Add Location', 'Import Locations', 'Download...', 'Sample Import...', 'Enter Group...', and a search bar. The sidebar also includes links for Dashboard, Analytics, Policy, Activation, and Search.

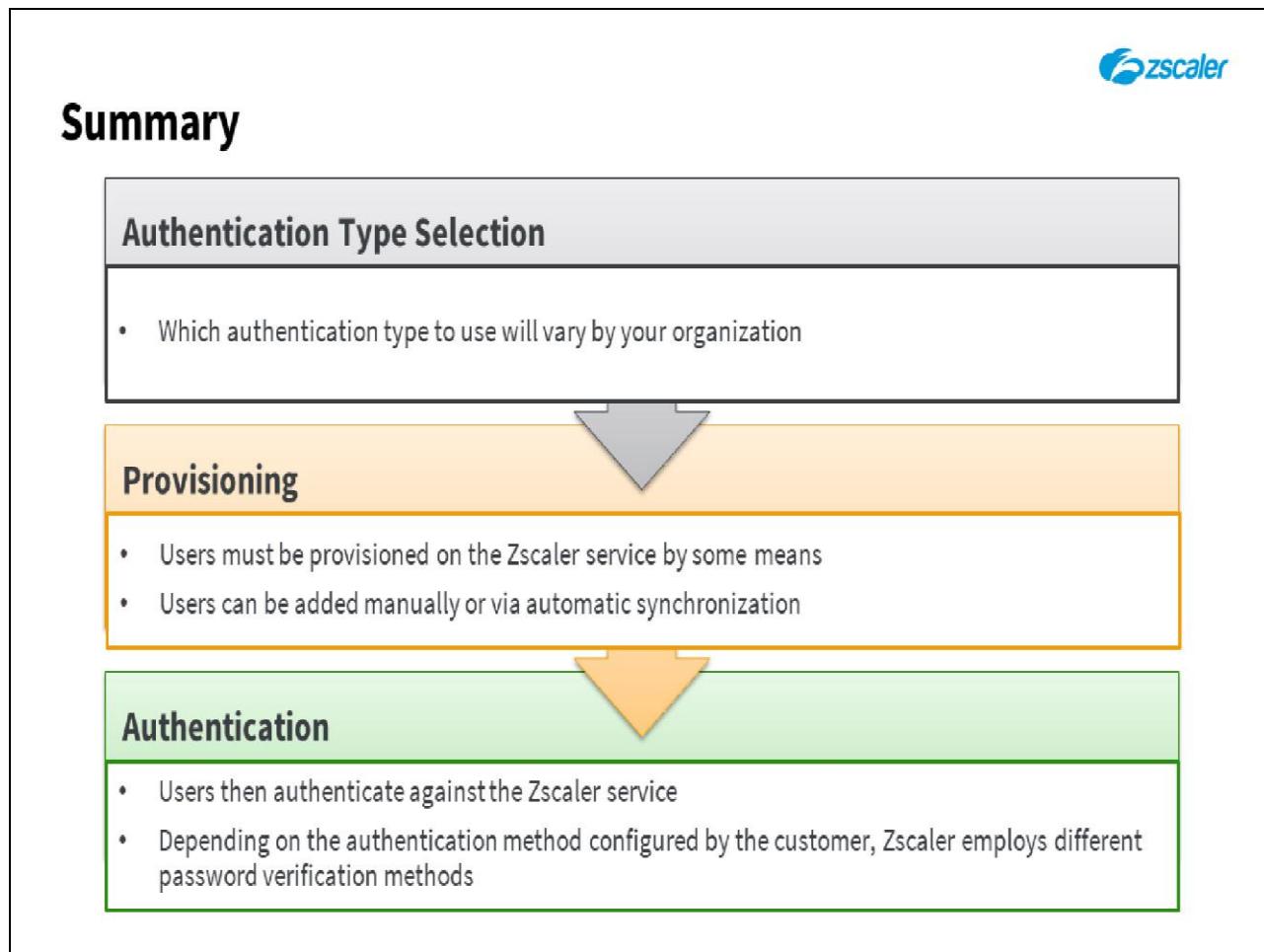
Slide notes

Slide 96 - Summary



Slide notes

Slide 97 - Summary



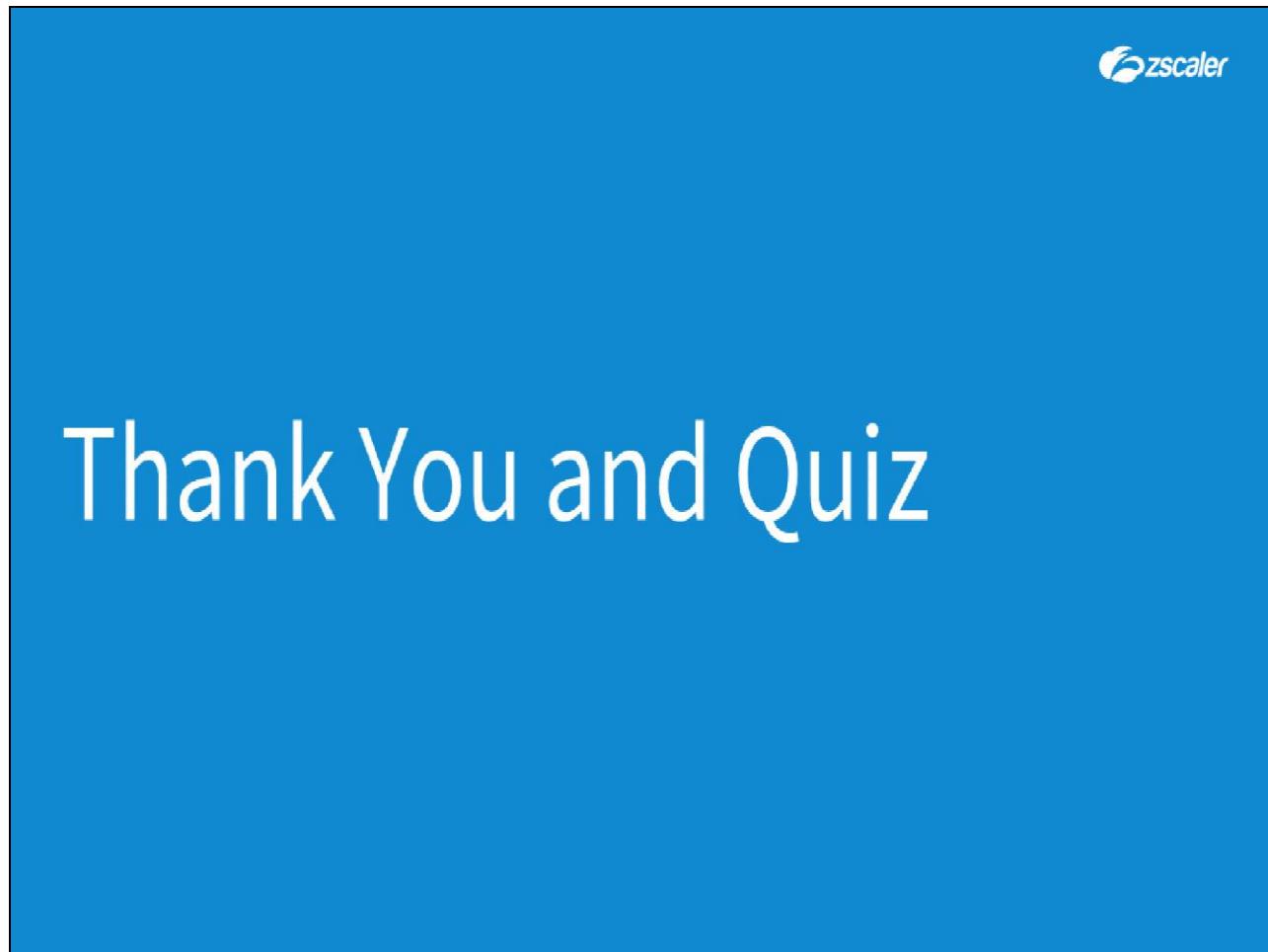
Slide notes

To summarize this eLearning module: Users are assigned to Groups. Groups have Policies assigned to them; therefore, Group membership determines the policies applied to the User. Users can belong to up to 128 Groups and the Policies from each Group are additive.

Departments are used for Reporting and should reflect your organizations reporting structure. A User can belong to only one Department.

The internal Hosted DB is typically used for Proof of Concept testing or in small organizations that do not have an external user authentication scheme.

Slide 98 - Thank You and Quiz



Slide notes

Thank you for viewing this eLearning module on User Authentication using the Hosted Database. We hope you found the information useful.

What will follow is a short quiz to test your knowledge of the material presented in this module. You may re-take this quiz as many times as is necessary to pass.