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A.B.N 18 164 655 485

# Jalapeno

## User Administration Guide

Version 1.3



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## Document History

Version	Date	Comments	Released By
1.0	8 Sep 17	Initial version	DR
1.1	19 Oct 17	Include Details for Password Details / Emailing a user	DR
1.2	16 June 20	Updated to include new administration interface	MW
1.3	8 March 21	Updated to include addition of collaborator license into the administration interface	RG



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## Overview

### Purpose

This document provides instructions on administering user access for the Jalapeno software.

### Audience

This document is intended to be read by application administration staff who will be administering Jalapeno user access for their organisation.

### Scope

This document is concerned with the administration of user access to Jalapeno.

### Distribution

This document provided by Capsifi as Commercial-in-Confidence information and contains details of the internal operation of the Jalapeno system. As such, it should not be disclosed to any third party without the approval of Capsifi.

## 1. Exec Summary

Jalapeno is a Software-as-a-Service platform used to model the business, based on the Capsicum Framework. Jalapeno enables organisations to capture:

- a comprehensive model of its business to support better decision making
- a common vocabulary and understanding of its business concepts
- reusable business assets that accelerate transformation

The Capsicum Framework is a template that describes how the organisation works. It is a framework for strategically aligned business architecture based on semantic-modelling and model-driven architecture. It provides a structure for comprehensive modelling for the organisation.

## 2. Background

The Jalapeno administrator will have access to create, maintain and delete users for the Jalapeno software.

## 3. User Administration Guide

### Finding the user admin tools page

To navigate to the user admin tools page a user needs certain permissions. To find the admin tools page, follow these steps:

1. Log into Jalapeno using your usual authentication mechanism (username & password, or Single Sign-On)
2. Select a model to which you have **EDIT** access.
3. Under “Model Workbench” select a Jalapeno module, e.g. Business Architecture
4. Navigate to the top right of the page and click on the tools menu
5. Select “User Admin” from the menu

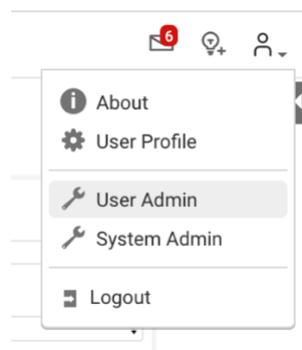


Figure 1 - Jalapeno User Admin Menu option

The legacy user administration page is still available via the System Admin page.

## The User Administration Page

The user administration page will load if you have the appropriate permissions. There are two top-level tabs to this page, the User Management tab, and the Bulk User Management Tab.

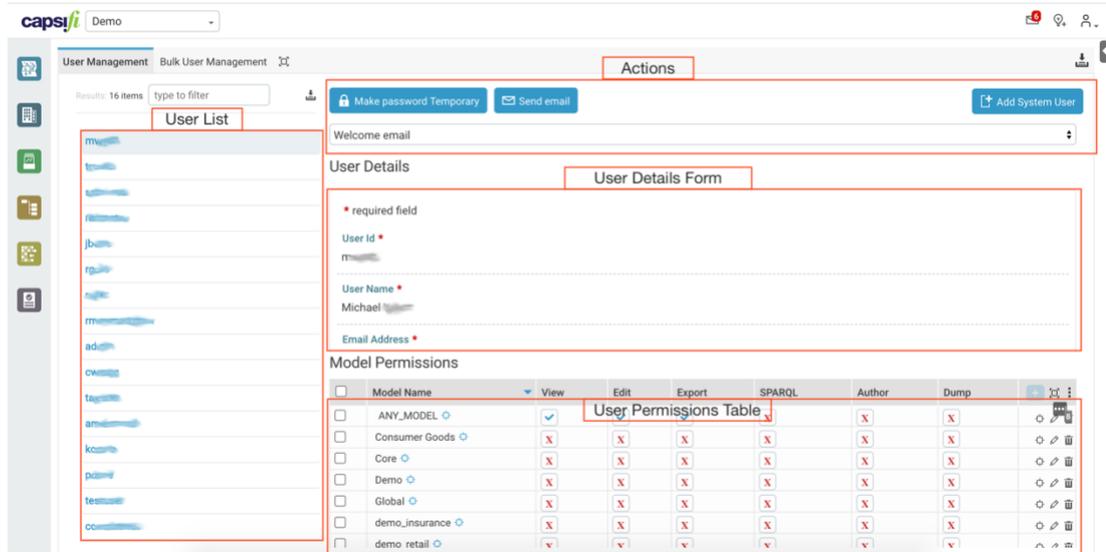


Figure 2 - Jalapeno User Management Tab

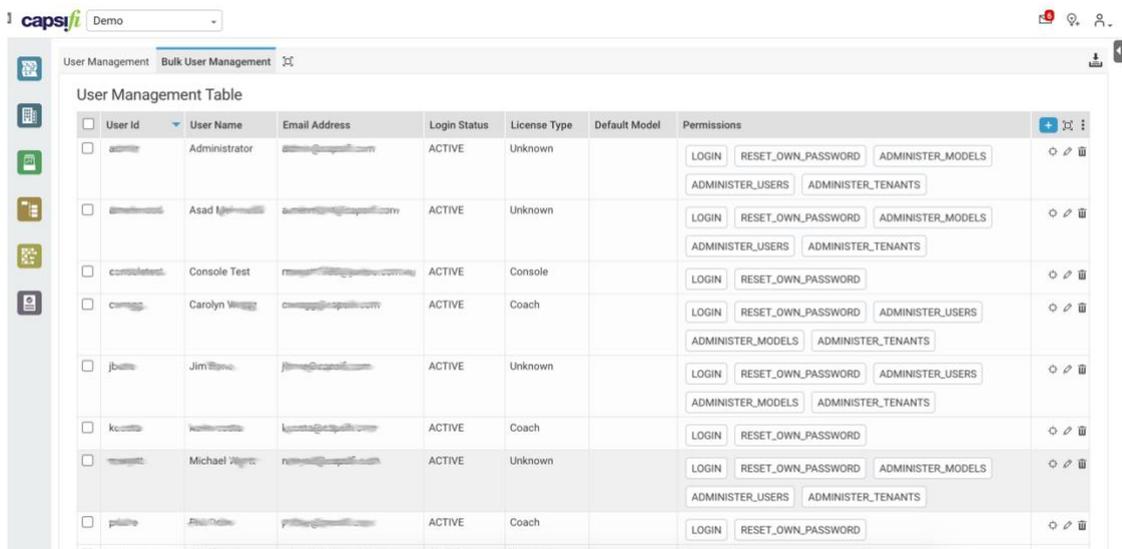


Figure 3 - Jalapeno Bulk User Management Tab

The bulk management tab allows a limited set of changes to be made to users in tabular form, while the more detailed user management tab provides full access to a user's details.

## Adding a user

There are several steps to creating a user, some of which can be completed in either tab and others which must be done via the user management form.

Step	User management	Bulk user management
Create the user	X	X
Assign model permissions	X	-
Send welcome email	X	-

### Creating the user via the User Management tab

Select the button marked Add System User in the top-right hand corner of the page.

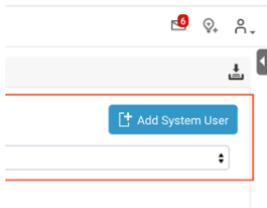


Figure 4 - Add System User button

A dialogue box will appear with a form for the details of the new user:

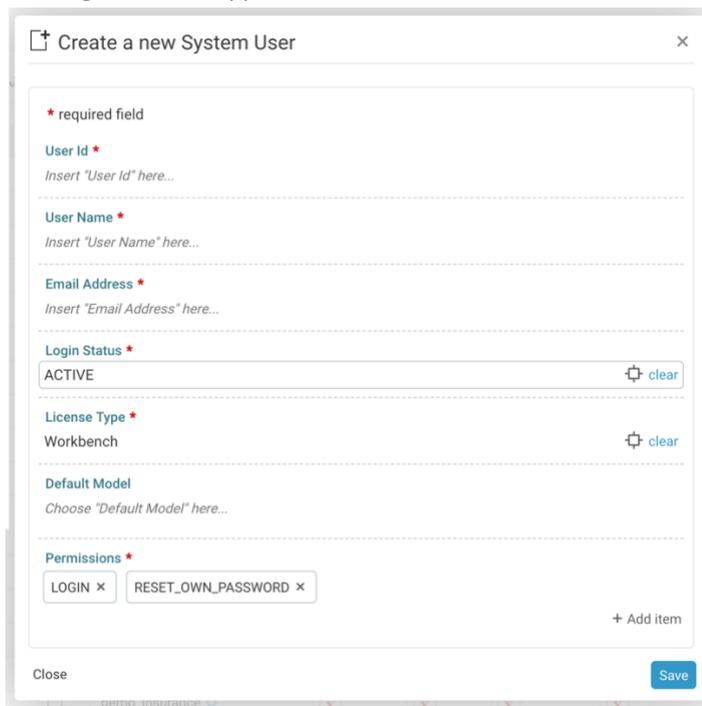


Figure 5 - Add System User dialogue

The fields are:

User Id	The username that will be used to login and identify this user in the system. This must not contain spaces, but may contain accented characters. This field is mandatory.
---------	---

User Name*	The real name of the user. This is used to help identify user records and to personalize emails. This field is mandatory.
Email Address*	Required to send emails to the user for password reset operations and notifications. In Single Sign-On systems, this is used to match users to the SSO account. This field is mandatory.
Login status*	<p>The Login status affects how a user may log into the system.</p> <p><b>ACTIVE</b> users may log into the system as usual.</p> <p><b>BLOCKED</b> users are temporarily unable to log in, e.g. due to a number of failed password attempts.</p> <p><b>INACTIVE</b> users cannot log into the system.</p> <p>This field is mandatory, and defaults to ACTIVE.</p>
License Type*	<p>The License Type affects how users are billed, and which areas of the application they may access.</p> <p><b>Console</b> users may only view the Console pages.</p> <p><b>Collaborator</b> users may view all Console and Pathway pages.</p> <p><b>Workbench</b> users may view all Console, Pathway, and Workbench pages</p> <p><b>Administrator</b> users may view all Console, Pathway, and Workbench pages, and this administration page.</p> <p><b>Coach</b> users are Capsifi staff who have been granted access to this application for coaching and collaboration purposes.</p> <p><b>System</b> users are accounts for automation purposes.</p> <p><b>Unknown</b> licenses are legacy users who have not been assigned a license type as yet.</p> <p>This field is mandatory.</p>
Default Model	If set, this user will be directed to this model immediately on login, and will not be prompted to select a model.
Permissions	<p>The system-wide permissions given to this user.</p> <p><b>LOGIN</b> permits this user to log into the system. This is required for access to the system and is granted to all users by default.</p> <p><b>RESET_OWN_PASSWORD</b> allows this user to modify their Jalapeno login password. This should be granted to all users of the system <i>unless</i> Single Sign-On is enabled. Users who log on via Single Sign-On should not be granted this permission.</p> <p><b>ADMINISTER_MODELS, ADMINISTER_USERS</b> permit users to make administrative changes to access to the system. These permissions should be granted together, as the process of creating a new user requires both permissions.</p> <p><b>ADMINISTER_TENANTS</b> is a super-user permission granted to Capsifi staff only.</p>

Fill in the form as required for your new user and select Save. The user is created in the system with a randomized password.

## Creating the user via the Bulk User Management tab

Select the Add Row button in the user management table.



Figure 6 - Add new row button

A blank row appears in the table for you to fill in.

User Management Table

User Id	User Name	Email Address	Login Status	License Type	Default Model	Permissions
<input type="text"/>	<input type="text"/>	<input type="text"/>	+ Select item	+ Select item	+ Select item	+ Add item

Figure 7 – New User table row

Fill the values for the new user. The fields are the same as the above. Select the Save icon on the right-hand end of the row once all fields are filled.

The user is created in the system with a randomized password.

### Assigning a user’s permissions

The user created in the previous stage has access to Jalapeno, but no models. These are assigned on the User Management tab.

Select the user from the User List on the left-hand side of the page. The fields and table on the right will load with the user’s details. The grid at the bottom half of the right-hand side shows the available models, and the permissions assigned to the user for each of them.

Model Permissions

Model Name	View	Edit	Export	SPARQL	Author	Dump
ANY_MODEL	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Consumer Goods	<input checked="" type="checkbox"/>					
Core	<input checked="" type="checkbox"/>					
Demo	<input checked="" type="checkbox"/>					
Global	<input checked="" type="checkbox"/>					
demo_insurance	<input checked="" type="checkbox"/>					
demo_retail	<input checked="" type="checkbox"/>					

Figure 8 –User permissions table

Each column represents a Permission that can be granted to a user. The permissions are:

View	The user may view this model and any information contained within it. This permission must be granted for the user to be able to select the model.
Edit	The user may make modifications to the information contained in this model.
Export	The user may export grids and reports from the model, e.g. to PDF or Excel sheets. This permission is also required if users are to make bulk imports via spreadsheet.
SPARQL	This permission is reserved for future use and should only be granted to expert users who have undertaken specific training.
Author	This permission is reserved for future use and should only be granted to expert users who have undertaken specific training.
Dump	The user may export the <b>entire</b> model to a flat file. This permission should only be granted to a minimal number of users or granted temporarily as-needed.

Each row in the table represents a Model loaded on the system. There are a couple of specialized models that must be treated carefully:

**Core** is the common model which contains the base information for the Jalapeno product. All users should be granted **View** permission to this model. It cannot be selected for editing, so additional

permissions will have no effect.

**ANY\_MODEL** (if available) is a permission that applies to all models. Any permissions granted to this row will be effective for **all** models in the system. This is not typically made available in production instances.

When making changes to permissions, first place the row into Edit mode by clicking the pencil icon on the right-hand end or double-clicking on any field. Then click each cell to change permissions as needed. Ensure that a tick or cross is present in each cell. Once complete, select the Save icon at the right-hand end to update the database.

Multiple rows may be selected and updated in bulk. First select the rows to update on the left-hand edge, then select Bulk Edit from the table's tools icon.

Model Permissions

<input type="checkbox"/>	Model Name	View	Edit	Export	SPARQL	Author	Dump	
<input type="checkbox"/>	ANY_MODEL	<input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/>	Consumer Goods	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Core	<input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/>	Demo	<input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/>	Global	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	demo_insurance	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	demo_retail	<input checked="" type="checkbox"/>						

Figure 9 – Selecting rows for bulk editing

A dialogue pops up. Select the new permissions and then click Save to apply these permissions to the rows.

**Bulk edit** ✕

You are about to edit:

Model Name	View	Edit	Export	SPARQL	Author	Dump
Consumer Goods	<input checked="" type="checkbox"/>					
Demo	<input checked="" type="checkbox"/>					
Global	<input checked="" type="checkbox"/>					

You will **REPLACE** cells above with any changes you make here:

Model Name	View	Edit	Export	SPARQL	Author	Dump
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 10 – Bulk permissions edit

## Sending the Welcome email

Once the user has been set up with model permissions, they must be notified that their account has been provisioned. This is done via email direct from Jalapeno.

At the top of the User Management form is a set of action buttons.

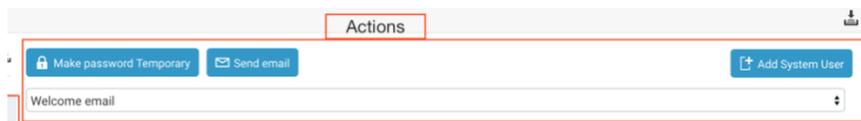


Figure 11 – Actions

The drop-down list contains a set of email templates.

Welcome email	Welcomes the user to Jalapeno, and provides a link to allow the user to log in and set their password.
Welcome email (SSO)	Welcomes the user to Jalapeno, and directs them to log in via the configured Single Sign-On system, e.g. Okta.
Password reset	Instructs the user to follow a link to reset their password.

Select the appropriate template and click Send email.

Your user should now be able to log into Jalapeno and access the models as configured.

**All user changes are logged and monitored by the Capsifi Operations Team.**

## Adjusting User Permissions

Adjusting a user's permissions is achieved in the same manner as setting them during the creation of the user. System-wide permissions can be modified on the User Management or Bulk User Management tabs, whilst Model-specific permissions must be modified via the User Management tab only.

**All permission changes are logged and monitored by the Capsifi Operations Team.**

## Password Management

If a user fails to log in with Username & Password authentication on multiple attempts, their account will become BLOCKED. Users can unblock their own account by clicking the "I've forgotten my password" link on the login page, however sometimes manual intervention is required. To manually set a user's password:

1. Navigate to the User Management tab
2. Select the user from the left-hand side list
3. In the right-hand side form, update the Login Status field from BLOCKED to ACTIVE.
4. Enter a new Password
5. Select Save
6. Select Make Password Temporary from the Action buttons at the top of the screen (if required)
7. Notify your user of their new password via a secure channel.

The password field contains some additional usage features. When first loaded, it shows a row of dots to signify that a password has been set. *The actual user's password is NOT loaded here and cannot be decrypted from the database.*

If the password is to be modified via the admin page, the buttons underneath become available.



The upper button will toggle visibility of the new password. The lower button generates a random password that fulfils the system password constraints.

**All password changes are logged and monitored by the Capsifi Operations Team.**

## Deleting a user

Once a user account is no longer required, there are two options available: the account can be set to a login status of INACTIVE, or the account can be deleted.

To delete an account, go to the Bulk User Management tab, and select the delete row button from the right-hand side. A confirmation dialog will be displayed. Click Delete to remove the user.

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## 4. Support

Please contact [support@capsifi.com](mailto:support@capsifi.com) for any assistance that may be required.