

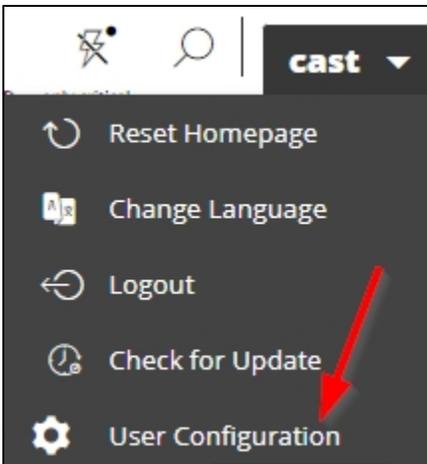
User roles - 2.x and above

- How are roles managed in 2.x?
- What roles are available?
 - Use of NO_ROLE in the user interface
- Create new profiles
- Assign or remove roles to/from profiles
- Assign profiles to users/groups
 - Assign profiles to SAML users/groups from UI

Summary: This section describes how to configure **roles** for users/groups in **2.x**.

How are roles managed in 2.x?

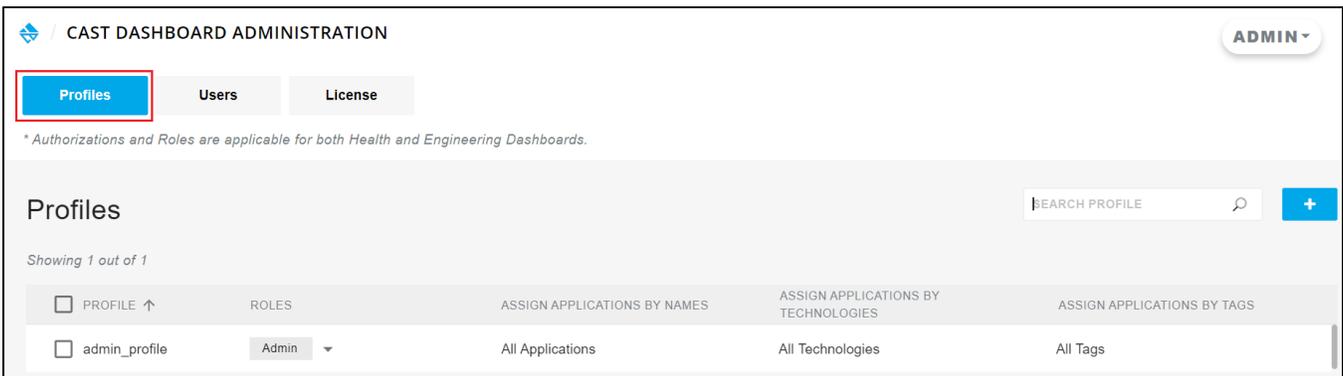
Roles are managed in a graphical user interface. This interface is available to users that have been assigned the **ADMIN role** and can be accessed by clicking the **User Configuration option** in the user menu:



The interface is then displayed. There are two tabs that are relevant for roles: **Profiles** and **Users**: by default the **Profiles** tab is displayed:

Click to enlarge

Profiles tab:

A screenshot of the CAST Dashboard Administration interface. The page title is 'CAST DASHBOARD ADMINISTRATION' and the user is logged in as 'ADMIN'. There are three tabs: 'Profiles' (highlighted with a red box), 'Users', and 'License'. Below the tabs, there is a search bar for profiles and a table of profiles. The table has columns for 'PROFILE', 'ROLES', 'ASSIGN APPLICATIONS BY NAMES', 'ASSIGN APPLICATIONS BY TECHNOLOGIES', and 'ASSIGN APPLICATIONS BY TAGS'. The first row shows a profile named 'admin_profile' with the role 'Admin' and is assigned to 'All Applications', 'All Technologies', and 'All Tags'.

* Authorizations and Roles are applicable for both Health and Engineering Dashboards.

PROFILE ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> admin_profile	Admin ▾	All Applications	All Technologies	All Tags

Users tab:

CAST DASHBOARD ADMINISTRATION ADMIN ▾

Profiles **Users** License

** Authorizations and Roles are applicable for both Health and Engineering Dashboards.*

Users/Groups

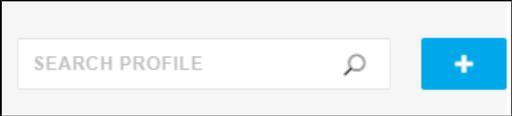
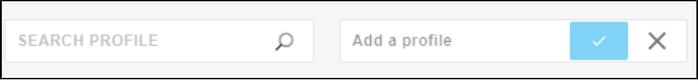
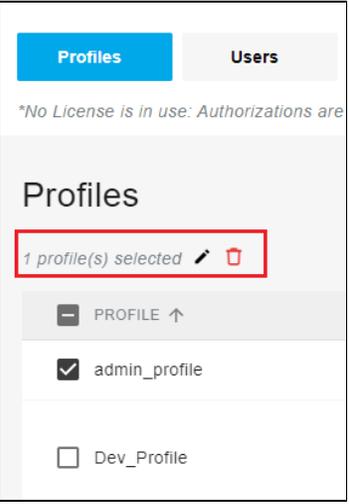
SEARCH USER 🔍

Showing 1 out of 1

<input type="checkbox"/> USERS/GROUPS ↑	PROFILES
<input type="checkbox"/> admin	admin_profile ▾

- i**
- The **Profiles** interface is used to **manage profiles - roles** (and also [Data authorization - 2.x and above](#)) are assigned to **profiles**
 - The **Users** interface is used to **assign profiles (managed in the Profiles tab)** to Users/Groups
 - Any changes made in the interface to assigned roles are taken into account only when the user logs out and logs back in again.

Options in Profile tab

Search and Add	 <p>SEARCH PROFILE 🔍 +</p>	<p>Search option lets you to search a Profile from the list of available Profiles. Enter the Profile name and click  to view the selected Profile.</p>			
	 <p>SEARCH PROFILE 🔍 Add a profile ✓ ✕</p>	<p>Add a profiles option lets you add a new Profile.</p>			
Edit and Delete	 <p>Profiles Users</p> <p><i>*No License is in use: Authorizations are</i></p> <h3 style="margin: 0;">Profiles</h3> <p style="margin: 0;">1 profile(s) selected  </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;"><input type="checkbox"/> PROFILE ↑</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> admin_profile</td> </tr> <tr> <td><input type="checkbox"/> Dev_Profile</td> </tr> </tbody> </table>		<input type="checkbox"/> PROFILE ↑	<input checked="" type="checkbox"/> admin_profile	<input type="checkbox"/> Dev_Profile
<input type="checkbox"/> PROFILE ↑					
<input checked="" type="checkbox"/> admin_profile					
<input type="checkbox"/> Dev_Profile					
	 <p>This option allows you to edit the roles/authorizations assigned to the selected user/group. This is particularly useful if you need to modify multiple users/groups in one go.</p>				
	 <p>This option will remove all the roles/authorizations granted to selected the user/group.</p>				

Profiles

Lists all profiles that are available, by name:

<input type="checkbox"/>	PROFILE ↑
<input type="checkbox"/>	admin_profile
<input type="checkbox"/>	test_profile



On first login, a profile called "admin_profile" will be created automatically. This profile has the role "Admin" assigned to it. The first user to login and become admin (see [First login and become admin](#)) will be automatically assigned this profile.

Roles

ROLES

Admin ▾

Admin Code Restricted

Exclusion Manager

Quality Automation Manager Quality Manager

- All Roles
- Admin
- Code Restricted
- Exclusion Manager
- Quality Automation Manager
- Quality Manager

- Lets you select the built-in **Role** to be assigned to the selected **Profile**.
- Lists the roles that have been assigned to the corresponding **Profile**.

Assign applications by Names / Assign applications by Technologies / Assign applications by Tags

These columns list the **data authorizations** that have been assigned to the corresponding **Profile**, i.e., by:

- **application name**
- **by technology**
- **by tags**



The **Assign applications by tags column** will NOT be visible:

- If you are only using a standalone Engineering Dashboard
- If you are only using a standalone Health Dashboard and you have not [defined any categories or tags](#)
- If you are using a combined Health and Engineering Dashboard and you have not [defined any categories or tags](#)

You can directly modify them in this column:

ASSIGN APPLICATIONS BY NAMES

Assign Applications By Names ▲

🔍 APPLICATIONS SEARCH

- All Applications
- MEUDON

ASSIGN APPLICATIONS BY TECHNOLOGIES

Assign Applications By Technologies ▲

🔍 TECHNOLOGIES SEARCH

- All Technologies
- HTML5
- JEE
- SQL

ASSIGN APPLICATIONS BY TAGS

Business Unit : Operations ▼

All Tags

All Tags

Age : 1-2 Business Unit : Finance
Business Unit : HR Country : China

Age

- 1-2
- 3-7
- > 7

Business Unit

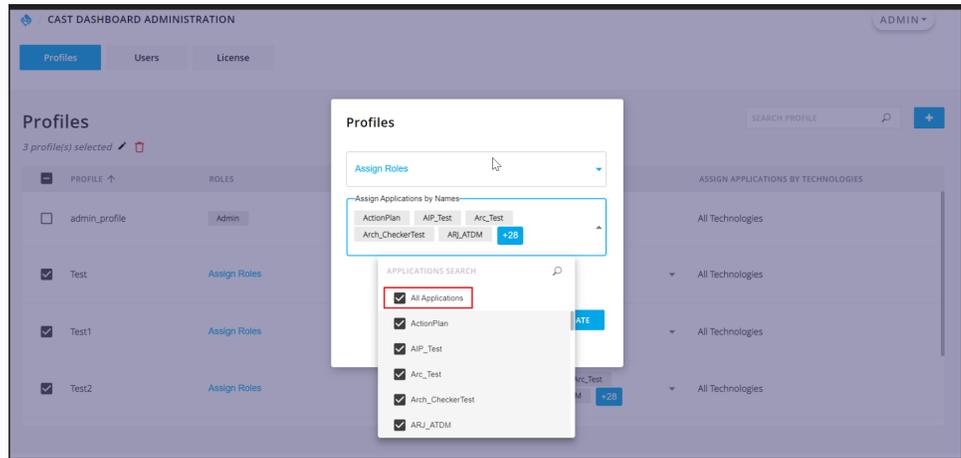
- Finance
- HR
- Operations
- Research
- Sales

Country

- China
- France
- India
- Morocco
- UK

Note about the All Applications option for Assign Applications by Name:

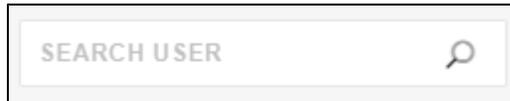
- Users can assign "All Applications" to multiple profiles or a single profile without adding any role to the selected profile/s.
- When using the "All Applications" authorization, any new Applications that are onboarded will automatically be included in the authorization.



Options in Users tab

Search

Lets you search a User or a Group from the list of available Users/Groups.



Users

This column lists all users/groups:

Users/Groups

Showing 4 out of 4

- USERS/GROUPS ↑
- cast
- guest
- testuser1
- testuser2

- When **local authentication** is active:
 - all users that have been defined in the **users.properties** file will be listed here
 - it is not possible to create groups, therefore assigning roles or data authorizations to groups is also not possible
- When **LDAP or SAML authentication** are active:
 - only users/groups that have specifically been assigned a profile will be listed
 - Groups are taken directly from the LDAP/SAML directory and must therefore be created there before they can be exploited by the CAST Dashboards

Profiles

This column lists all profiles that have been created in the **Profiles tab** and allows you to assign them to your users /groups:

PROFILES

admin_profile ▼

admin_profile ▼

admin_profile ▼

PROFILE SEARCH 

- All Profile
- admin_profile
- Dev_Profile
- HR_Profile
- QA_Profile

Assign Profile ▼

Assign Profile ▼

Edit Lets you edit the selected **Users/Groups**, i.e. change the profile assigned to the User/Group:

Users/Groups

1 user(s) selected

-
USERS/GROUPS
↑

- admin

Users

PROFILE SEARCH 🔍

- All Profile
- admin_profile
- TEST
- test_profile

CANCEL
UPDATE

What roles are available?

See [User roles](#).

Use of NO_ROLE in the user interface

The role **NO_ROLE** is a role that is available for use, however, this role is not directly made available in the interface to be assigned. Instead, NO_ROLE can be assigned simply by granting a **Data authorization** and none of the roles. For example, **test_profile** in the image below has no roles assigned to it, but it has one data authorization assigned (to access the application called "MEUDON") - therefore a user/group with this profile can log in and access the application but has no other permissions:

Click to enlarge

PROFILE ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> admin_profile	Admin ▾	All Applications	All Technologies	All Tags
<input type="checkbox"/> test_profile	Assign Roles ▾	MEUDON ▾	Assign Applications By Technologies ▾	Assign Applications By Tags ▾

Create new profiles

To create or edit a profile, use the **Profiles** tab:

CAST DASHBOARD ADMINISTRATION ADMIN

Profiles Users License

* Authorizations and Roles are applicable for both Health and Engineering Dashboards.

Profiles SEARCH PROFILE +

Showing 1 out of 1

PROFILE ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> admin_profile	Admin ▾	All Applications	All Technologies	All Tags

Click the **Add** button to add a new profile:

CAST DASHBOARD ADMINISTRATION ADMIN

Profiles Users License

* Authorizations and Roles are applicable for both Health and Engineering Dashboards.

Profiles SEARCH PROFILE +

Showing 1 out of 1

PROFILE ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> admin_profile	Admin ▾	All Applications	All Technologies	All Tags

Name the profile and click the tick icon to save:

TEST ✓ ✕

1 2

The profile will then appear in the list:

PROFILE ↑	ROLES
<input type="checkbox"/> admin_profile	Admin ▾
<input type="checkbox"/> TEST	Assign Roles ▾
<input type="checkbox"/> test_profile	Admin Code Restricted Exclusion Manager Quality Automation Manager Quality Manager

Assign or remove roles to/from profiles

To assign or remove roles to/from a profile, use the **Profiles tab**:

CAST DASHBOARD ADMINISTRATION ADMIN

Profiles Users License

* Authorizations and Roles are applicable for both Health and Engineering Dashboards.

Profiles SEARCH PROFILE +

Showing 1 out of 1

PROFILE ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> admin_profile	Admin ▾	All Applications	All Technologies	All Tags

and then the expandable item in the **Roles column**. Changes are automatically saved but are only taken into account when the user logs out and logs back in again in a new session:

PROFILE ↑	ROLES
<input type="checkbox"/> admin_profile	Admin ▾

- All Roles
- Admin
- Code Restricted
- Exclusion Manager
- Quality Automation Manager
- Quality Manager

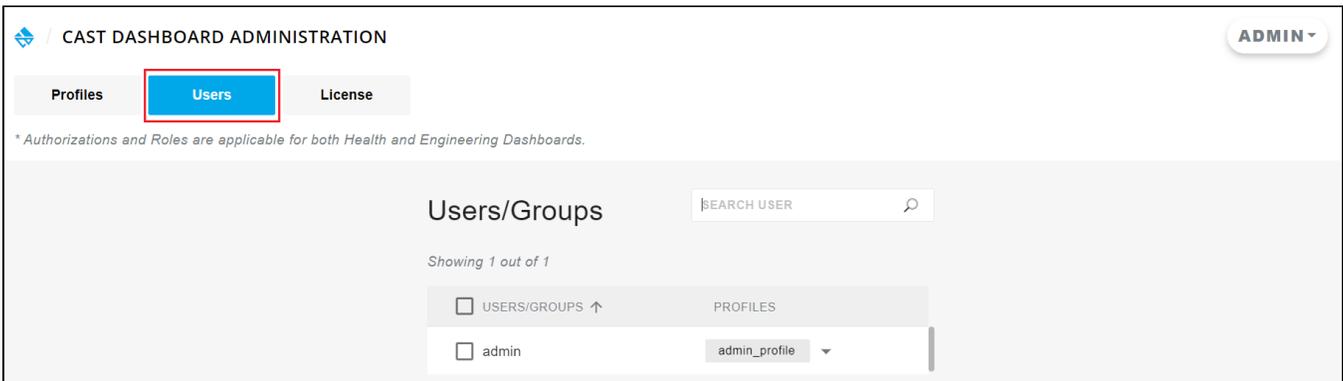
If you assign **All Roles** or just the **ADMIN role**, then automatically **All Applications**, **All Technologies** and **All Tags** (if available) are also assigned:

Click to enlarge

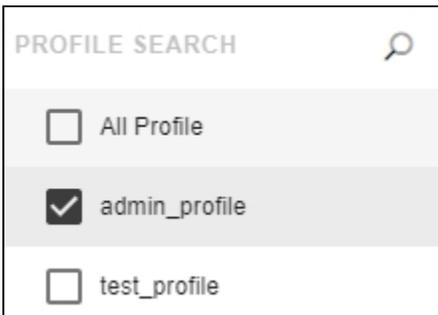
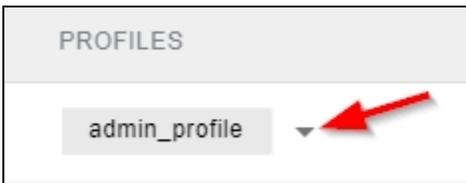
PROFILE ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> admin_profile	Admin ▾	All Applications	All Technologies	All Tags
<input type="checkbox"/> test_profile	Admin Code Restricted Exclusion Manager Quality Automation Manager Quality Manager	All Applications	All Technologies	All Tags

Assign profiles to users/groups

Ensure you create the profile first. Then to assign or remove roles to/from a profile, use the **Users tab**:

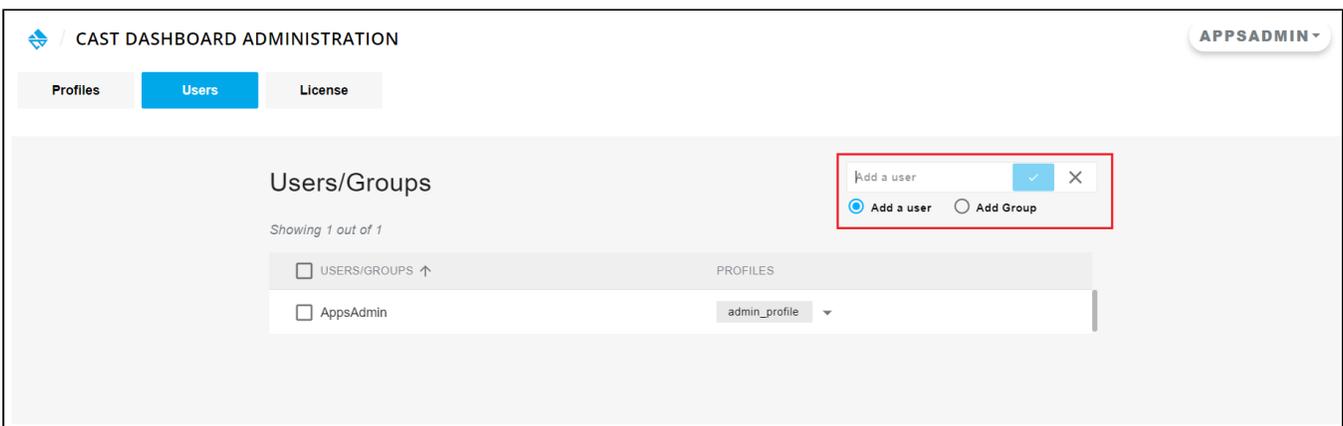


and then the expandable item in the **Profiles** column. Changes are automatically saved but are only taken into account when the user logs out and logs back in again in a new session:



Assign profiles to SAML users/groups from UI

Ensure you create the profile first. Then to assign or remove roles to/from a profile, use the **Users** tab:



and then the expandable item in the **Profiles** column. Changes are automatically saved but are only taken into account when the user logs out and logs back in again in a new session:

PROFILES

admin_profile 



PROFILE SEARCH 

All Profile

admin_profile

test_profile