

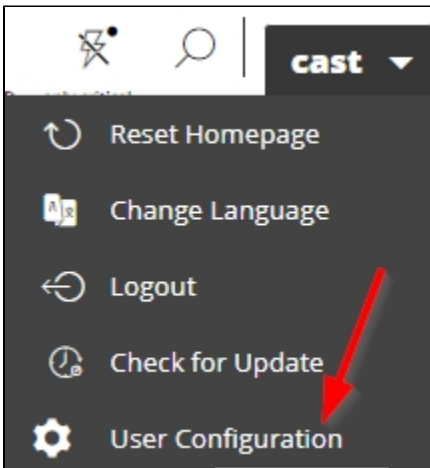
Data authorization - 2.x and above

- [How are data authorizations managed in 2.x?](#)
- [Using a RESTRICTED legacy type license key for accessing the Dashboard schema](#)
- [Assign or remove authorizations](#)
- [Delete all assigned authorizations](#)

i Summary: This section describes how to configure data authorization in **2.x**.

How are data authorizations managed in 2.x?

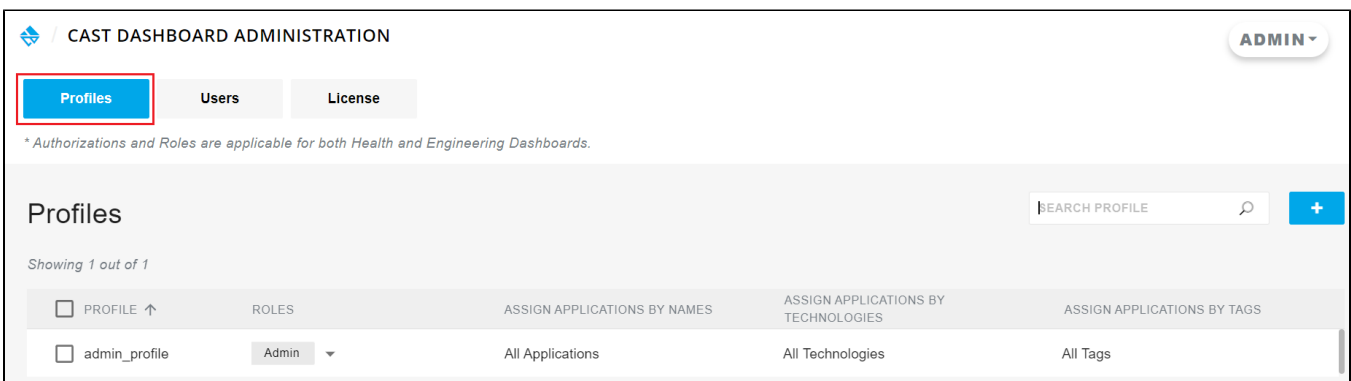
Data authorization is managed in a graphical user interface. This interface is available to users that have been assigned the **ADMIN role** and can be accessed by clicking the **User Configuration option** in the user menu:



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

Click to enlarge

Profiles tab:



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 - data authorizations** (and also **User roles - 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 data authorizations are effective immediately.


Options in Profile tab

Search and Add	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 90%;" type="text" value="SEARCH PROFILE"/> 🔍 + </div> <div style="border: 1px solid #ccc; padding: 5px;"> <input style="width: 40%;" type="text" value="SEARCH PROFILE"/> 🔍 <input style="width: 30%; border: 1px solid #ccc;" type="text" value="Add a profile"/> ✓ ✕ </div>	<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>Add a profiles option lets you add a new Profile.</p>	
Edit and Delete	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Profiles Users </div> <p style="font-size: 0.8em; color: #666;">*No License is in use: Authorizations are</p> <h3 style="margin: 0;">Profiles</h3> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">1 profile(s) selected </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; display: flex; justify-content: space-between;"> ▾ PROFILE ↑ </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; display: flex; justify-content: space-between;"> <input checked="" type="checkbox"/> admin_profile </div> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> <input type="checkbox"/> Dev_Profile </div> </div>		<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <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> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>This option will remove all the roles/authorizations granted to selected the user/group.</p> </div>

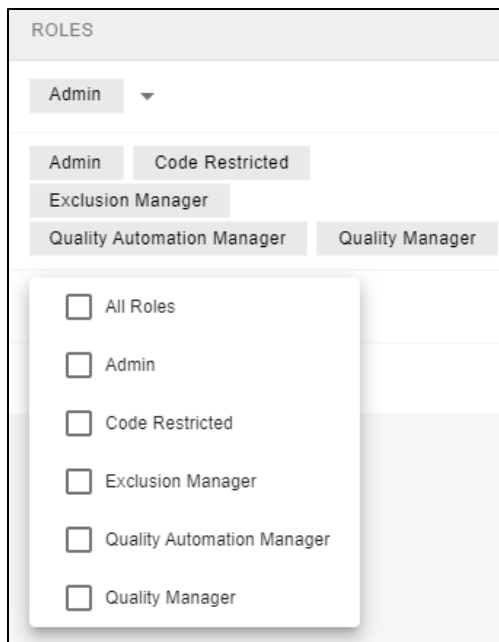
Profiles

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

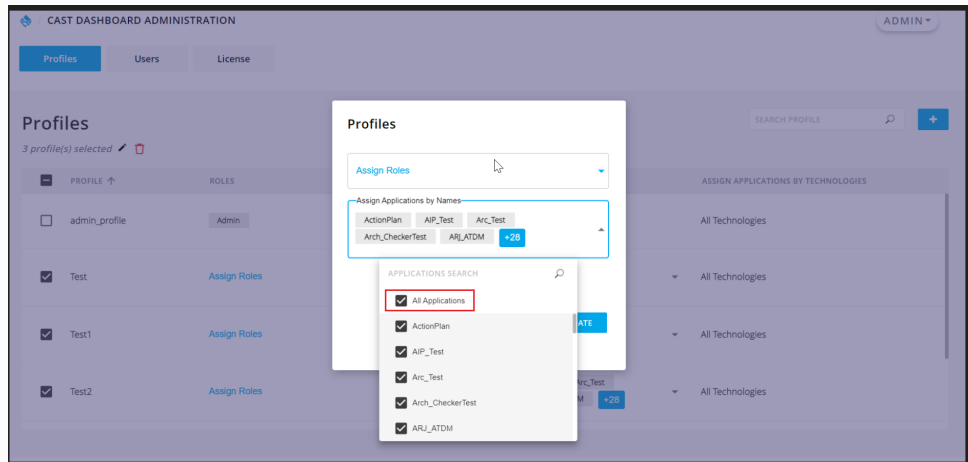
- Finance
- HR
- Operations
- Research
- Sales

Country

- China
- France
- India
- Morocco
- UK

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

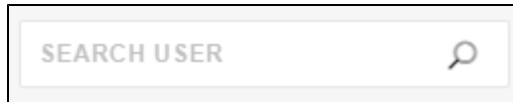
- Users can assign "All Applications" to multiple profiles or a single profile without adding any role to the selected profile/s.
- When using the "All Applications" authorization, any new Applications that are onboarded will automatically be included in the authorization.



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:

The image shows two screenshots of a web interface. The top screenshot is titled 'Users/Groups' and shows '1 user(s) selected' with a red box around an edit icon. Below this is a list of users with 'admin' selected. The bottom screenshot is titled 'Users' and shows a 'PROFILE SEARCH' dropdown menu with 'admin_profile' selected. There are 'CANCEL' and 'UPDATE' buttons.

Using a RESTRICTED legacy type license key for accessing the Dashboard schema

i This section is **not relevant for those using a current license key**. Authorizations are always defined in the UI and the `license.xml` is ignored.

When using a legacy type RESTRICTED license key for accessing the Dashboard schema (Engineering/Security Dashboard) - see [Dashboard Service license key configuration](#) - you **MUST** define authorizations **manually** in the following file:

```

WAR 2.x
CATALINA_HOME\webapps\

```

In other words, if you are using:

- a **standalone Engineering Dashboard** AND a **standalone Health Dashboard** AND you are using a legacy type **RESTRICTED license for the Engineering Dashboard**
- a **combined WAR/ZIP file** (containing both the Engineering and Health Dashboards) AND you are using a legacy type **RESTRICTED license for the Engineering Dashboard**

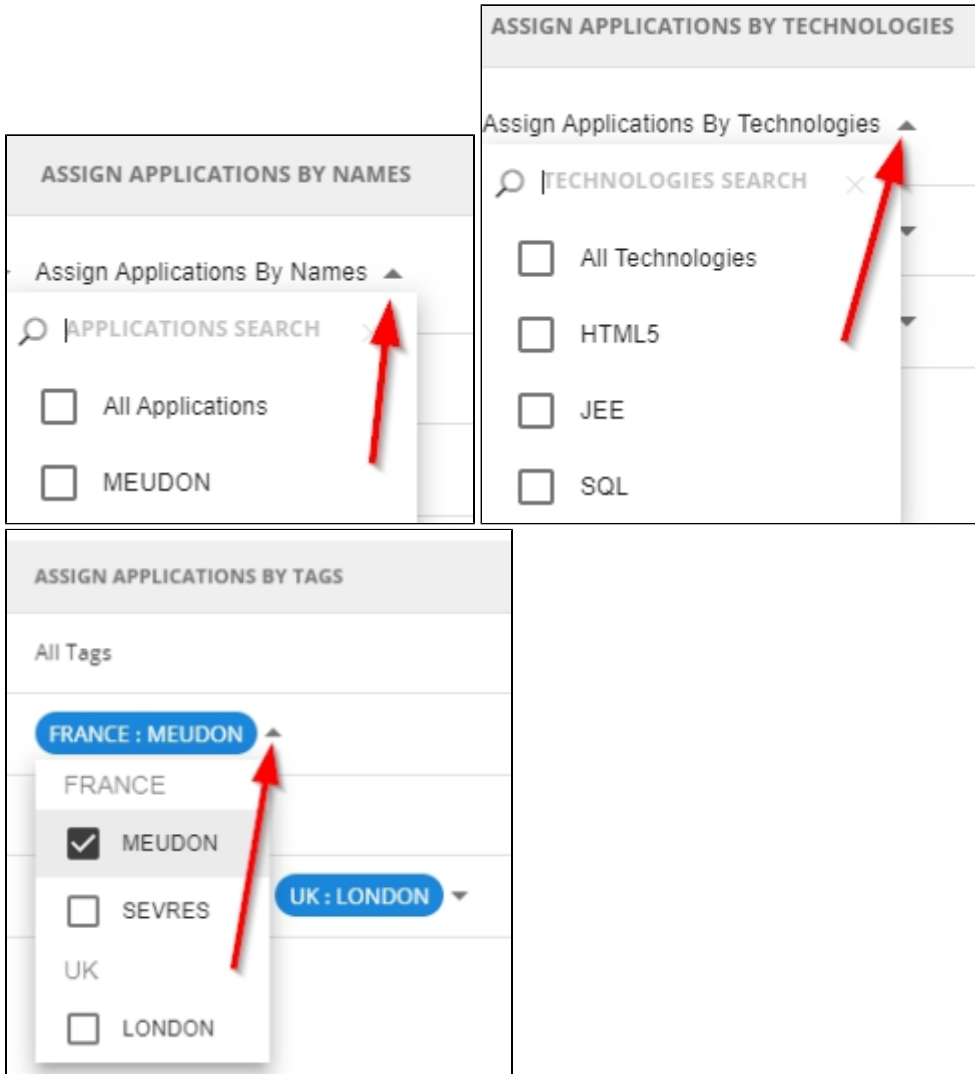
you should:

- define authorizations in **license.xml** for the **Engineering Dashboard**
- define authorizations in the **user interface** for the **Health Dashboard**

The authorizations do not need to be identical in the user interface and in license.xml if the user/group requires different authorizations in each dashboard.

Assign or remove authorizations

To assign or remove authorizations from a user or group, use the expandable column in either list. Changes are automatically saved and are taken into account immediately:



If you assign **All Applications**, then automatically **All Technologies** and **All Tags** are also assigned since it is not possible to prevent a user from accessing a specific technology/tag if the user can also access **all Applications**:

Click to enlarge

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

USERS/GROUPS ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES	ASSIGN APPLICATIONS BY TAGS
<input type="checkbox"/> cast	Admin	All Applications	All Technologies	All Tags
<input type="checkbox"/> guest	Quality Manager Quality Automation Manager	MEUDON MEUDON	All Technologies	All Tags
<input type="checkbox"/> testuser1	Code Restricted	MEUDON MEUDON	All Technologies	All Tags
<input type="checkbox"/> testuser2	Exclusion Manager	Assign Applications By Names	Assign Applications By Technologies	FRANCE : MEUDON UK : LONDON

Delete all assigned authorizations

To delete all roles that have been assigned to a user or group, select the user/group and then use the delete icon. Changes are automatically saved but are only taken into account when the user logs out and logs back in again in a new session:

Click to enlarge

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

<input type="checkbox"/> USERS/GROUPS ↑	ROLES	ASSIGN APPLICATIONS BY NAMES	ASSIGN APPLICATIONS BY TECHNOLOGIES
<input checked="" type="checkbox"/> guest	Quality Manager Quality Automation Manager Exclusion Manager	Assign Applications By Names ▾	Assign Applications By Technologies ▾
<input type="checkbox"/> testuser1	Assign Roles ▾	Assign Applications By Names ▾	Assign Applications By Technologies ▾
<input type="checkbox"/> testuser2	Assign Roles ▾	Assign Applications By Names ▾	Assign Applications By Technologies ▾

⚠ Using the delete option will remove both roles and data authorizations.