Create CAST Security schemas

On this page:

Summary: This section explains how to create the **CAST Security schemas**. This equates to the installation of the **CAST Management Service**, **CAST Analysis Service**, **CAST Dashboard Service** on the CAST Storage Service.

Prerequisites

CAST assumes that you have already installed the CAST Storage Service on either the current workstation, or on a dedicated machine that can be accessed by the current workstation.

> Please note that the **CAST Storage Service** requires no configuration prior to installing the CAST Security schemas. It is pre-configured ready for use.

If the CAST Storage Service is installed on a remote dedicated machine, ensure sure that the current workstation can access the remote dedicated machine over the network - this may entail creating appropriate firewall rules to allow the connection.

CAST recommends that **each Application** you need to onboard and analyze with CAST Security is configured to have **sole use** of a "**combined installation**" of CAST Security schemas as follows:

Application 1 uses:

- Management Service A
- Analysis Service A
- Dashboard Service A

If you need to analyze any additional Applications, CAST recommends that for each additional Application you create a new additional "**combined installation"** of CAST Security schemas:

Application 2 uses:

- Management Service B
- Analysis Service B
- Dashboard Service B

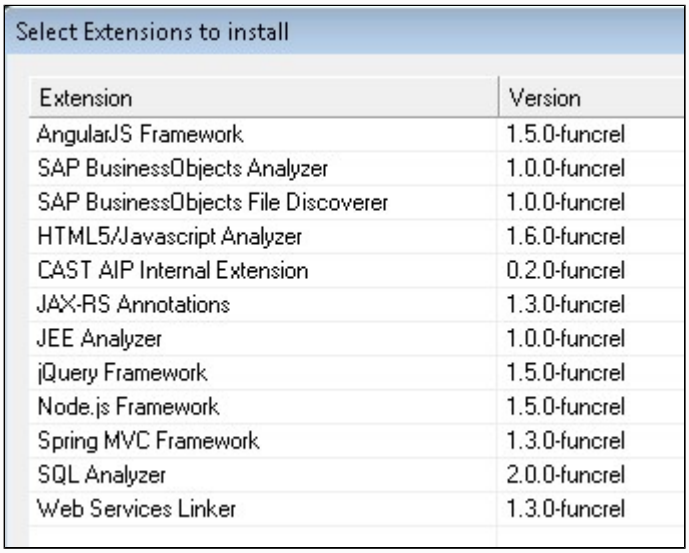
CAST provides support for a variety of technologies through what are known as "extensions". An extension is a generic term for any kind of **distinct addition to CAST Security** which can be downloaded, installed and upgraded separately. Extensions provided by CAST can provide support for the analysis of technologies such as **PHP** or the extraction of code from a **Git** repository, for example.

Extensions require installation and this can be done in two ways:

1. **During** the installation of your CAST Security schemas
2. **After** your CAST Security schemas have been installed

If you would like to install the extension **during the installation of your CAST Security schemas**, you must ensure that you have downloaded the required extension already. Please refer to Download an extension for more information about this.

Note that in **CAST Security 1.0**, several official extensions **are shipped with the setup** and are **installed by default** with all new combined installations. These will ALWAYS be installed and it is not possible to "unselect" them:



Technical note:

These extensions are shipped in a folder in the CAST Security installation folder called **shipped_extensions**. During the CAST Security installation process (i.e. when the setup is run), the content of this folder is synchronized with **%PROGRAMDATA%\CAST\CAST\Extensions** (the folder in which previously downloaded extensions are stored on the local machine):

- If the same extension version is already present in **%PROGRAMDATA%\CAST\CAST\Extensions** then nothing is done
- otherwise, the extension is copied across

Actions

To start the creation of the CAST Security schemas, launch the **CAST Server Manager** executable (**servman.exe**) on the current workstation.

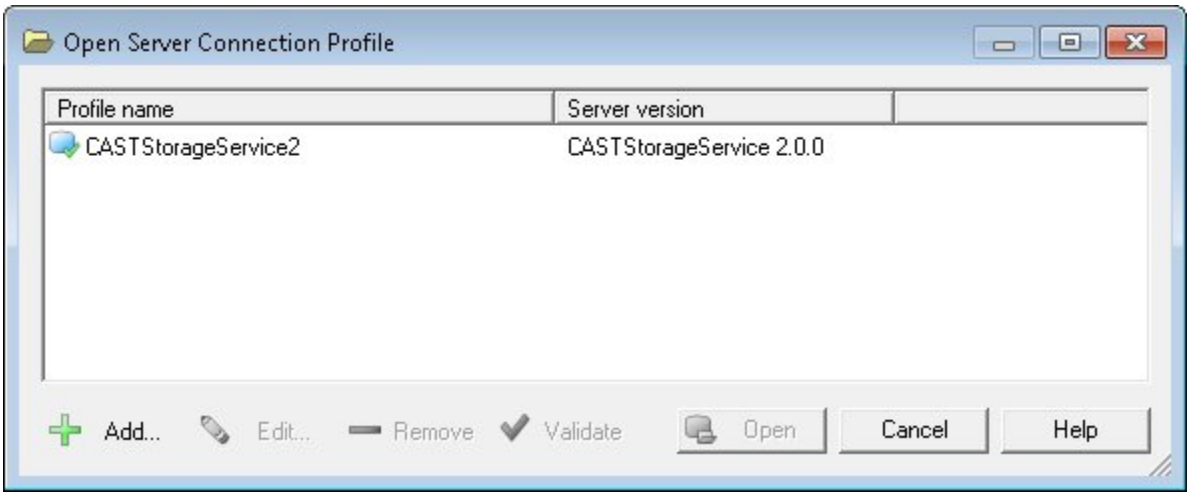
Connection

When you first launch CAST Server Manager, depending on your environment and previous installation choices, one of two things will happen:

CAST Storage Service installed on current workstation	A connection profile to the CAST Storage Service is automatically created when the CAST Security setup is run and can be selected in the **Open Server Connection dialog box** (see below).
CAST Storage Service installed on [illegible]	No connection profile is automatically created - you need to create your own connection profile (see below).

Using the auto created profile for CAST Storage Service

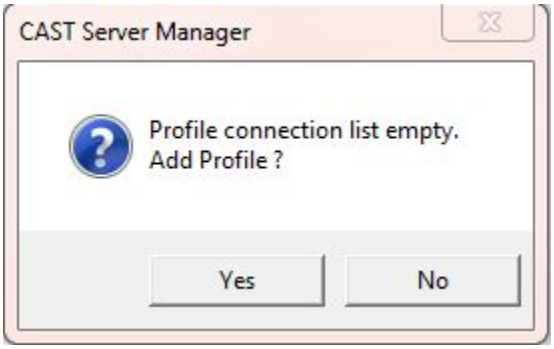
If a connection profile to the CAST Storage Service is **automatically created**, when you launch CAST Server Manager, the connection profile is then offered to you in the **Open Server Connection Profile dialog box** so that you can immediately connect to install the CAST Security schemas:



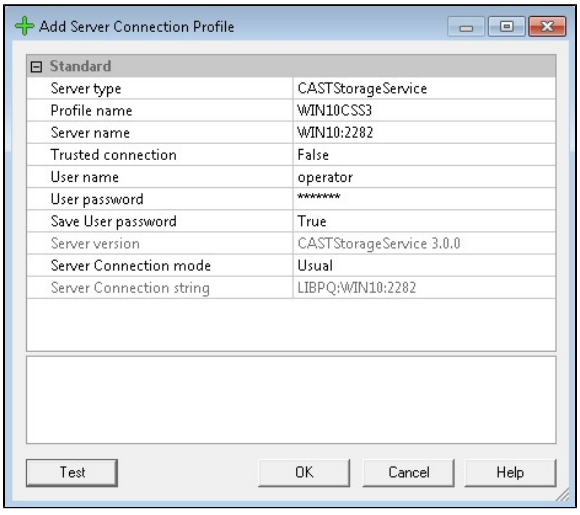
- Select the profile and click the **Open** button.
- Once the connection is established, you can then proceed with the installation of the CAST Security schemas

Manually creating a connection profile for CAST Storage Service

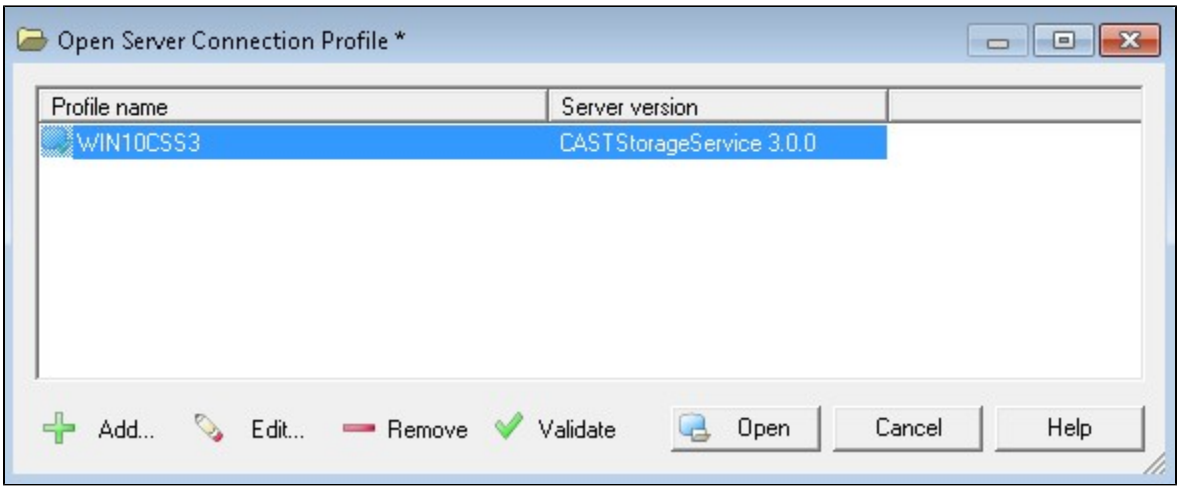
If the CAST Storage Service is installed on a remote machine, you will need **to manually create** a connection profile for the target CAST Storage Service /RDBMS which will host the CAST Security schemas. When launching CAST Server Manager, you will be prompted that no connection profiles exist - click **Yes** to continue:



- In the **Add Server Connection Profile dialog box**, insert the required connection parameters (ensuring that you chose the correct "Server type") and click **Test** to test the profile (see the CAST Server Manager on-line help for more information about the required parameters).
- Click **OK** to save it.



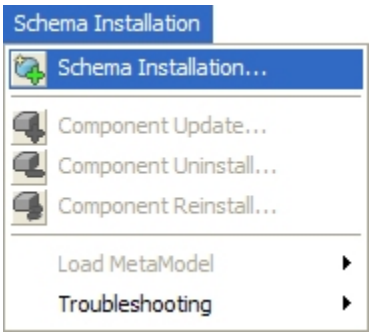
- Use this profile to establish a connection (use the **Open** button in the **Open Server Connection dialog box**) to the CAST Storage Service:



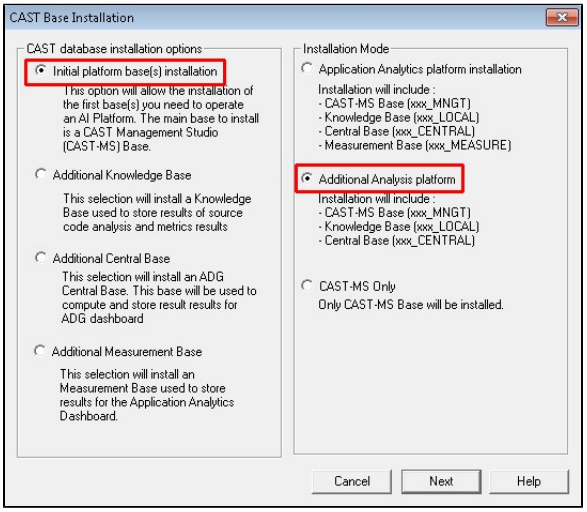
- When a connection is established, you can then proceed with the installation of the CAST AIP schemas.

Schema configuration

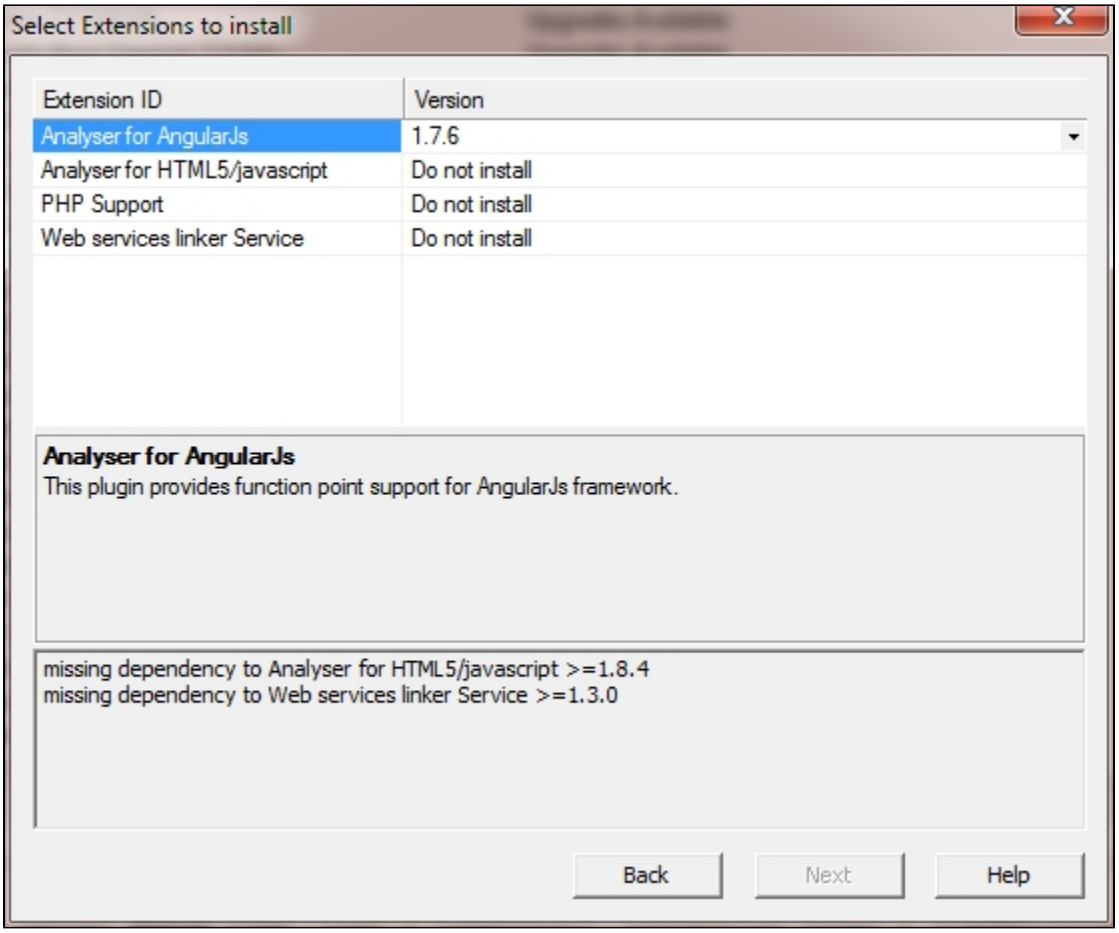
- Now select **Schema Installation** from the **Schema Installation** menu:



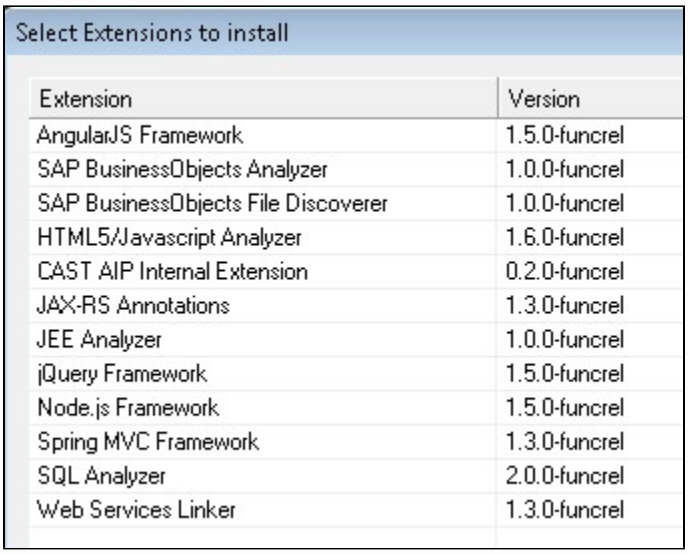
- The **CAST Schema Installation dialog box** will then be displayed (this dialog box enables you to choose what type of installation operation you want to carry out with CAST Server Manager). In the context of a CAST Security installation, you should chose the **Initial platform base(s) installation** and **Additional Analysis platform** options and then click **Next**. Choosing this option will create three CAST Security schemas with the following suffixes:
  - Management Service (_MNGT)
  - Analysis Service (_LOCAL)
  - Dashboard Service (_CENTRAL)



- The **Extension Selection dialog box** will then be displayed. This dialog box allows you to select and install extensions at the same time as you install your CAST Security schemas. Select the extensions you want to install (note that selecting one extension may automatically select other extensions for installation if the extension you selected has dependent extensions). If you do not want to install an extension at this time, ensure that **Do not install** is displayed for all extensions in the **Version** column. Click **Next** to continue.

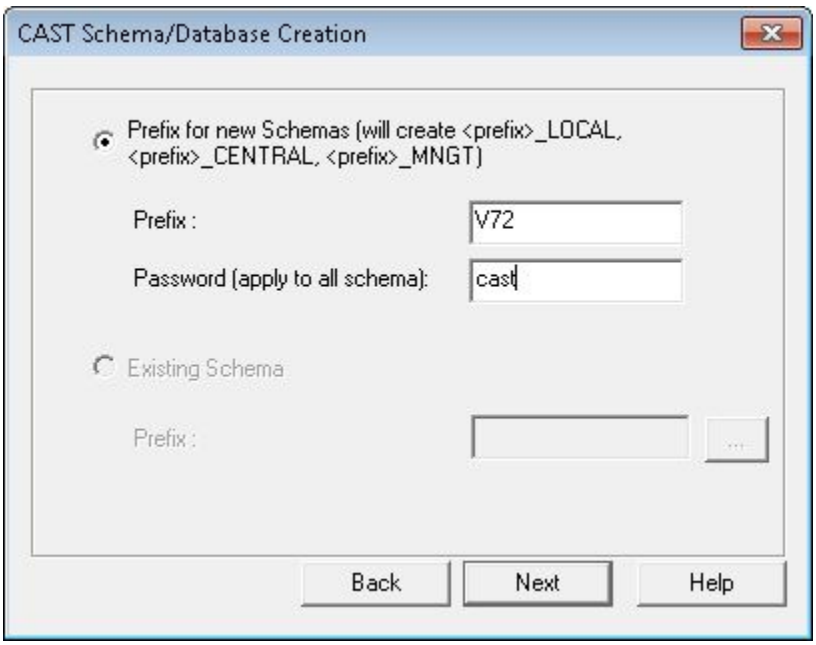


Note that in **CAST Security 1.0**, several official extensions **are shipped with the setup** and are **installed by default** with all new combined installations. These will ALWAYS be installed and it is not possible to "unselect" them:



- The **Schema Creation dialog box** will then be displayed. This dialog box will prompt you to enter a **prefix** that will be applied to the name of all new schemas that will be created. The resulting schemas will take the form:
  - **<prefix>_MNGT** > Management Service
  - **<prefix>_LOCAL** > Analysis Service

- **<prefix>_CENTRAL** > Dashboard Service



Naming convention requirements

For all server types please note the following **CAST** requirements:

- the name must be in upper case
- the following characters are authorized: 0-9, A-Z and _ (underscore)
- RDBMS specific naming rules also apply - please see the documentation for your specific RDBMS for more information.

- Click **Next** to continue.
- The next step involves defining configuration settings for the schemas that will be created. See the expandable section below for more information:

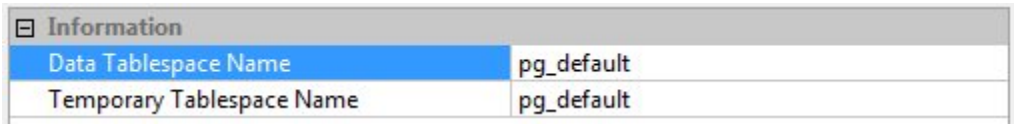
If you are using the **CAST Storage Service**, no installation configuration settings need to be adjusted. However, you can use either **dedicated** Data (for Tables and Indexes) and Temporary **tablespace** or the default **pg_default** and **pg_global** tablespaces on your CAST Storage Service. You can also, optionally, choose to store Tables and Indexes in **separate tablespace**.

If you are planning to use user defined tablespace rather than default system tablespaces, this tablespace must be created in **pgAdmin** or by using scripts before you run CAST Server Manager.

Database Creation dialog box

For the CAST Storage Service, the **Database Creation dialog box** enables you to choose the Data and Temporary Tablespace for your schemas. You can also, optionally, choose to store Tables and Indexes in separate Tablespace.

Option "Use different data space for Indexes and Tables" NOT selected



Data Tablespace Name	Select an existing Data Tablespace for tables and indexes. By default this is set to the **pg_default** tablespace, but this can be changed by selecting a new Tablespace from the dropdown list. The system tablespace **pg_global** along with any user defined tablespaces are offered in the drop down list. • If you want to use dedicated Data Tablespace just for CAST components - this must be created prior to using CAST Server Manager.
Temporary Tablespace Name	Select an existing Temporary Tablespace for temporary information. By default this is set to the **pg_default** tablespace, but this can be changed by selecting a new Tablespace from the dropdown list. The system tablespace **pg_global** along with any user defined tablespaces are offered in the drop down list.

	• If you want to use dedicated Data Tablespace just for CAST components - this must be created prior to using CAST Server Manager.

Option "Use different data space for Indexes and Tables" selected

If you prefer to store the schema's Tables and Indexes in separate Tablespaces (as oppose to in one general Data Tablespace), you can select the option **Use different data space for Indexes and Tables**. This will display additional fields entitled Table Tablespace Name and Index Tablespace Name along with the default Temporary Tablespace Name field.

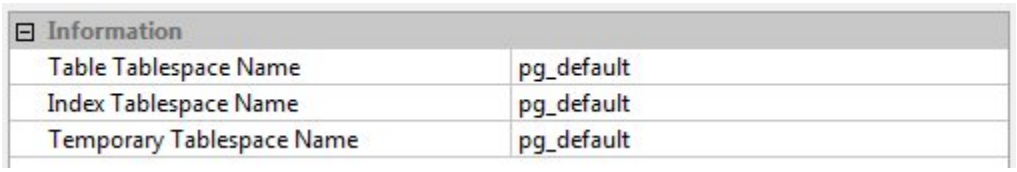
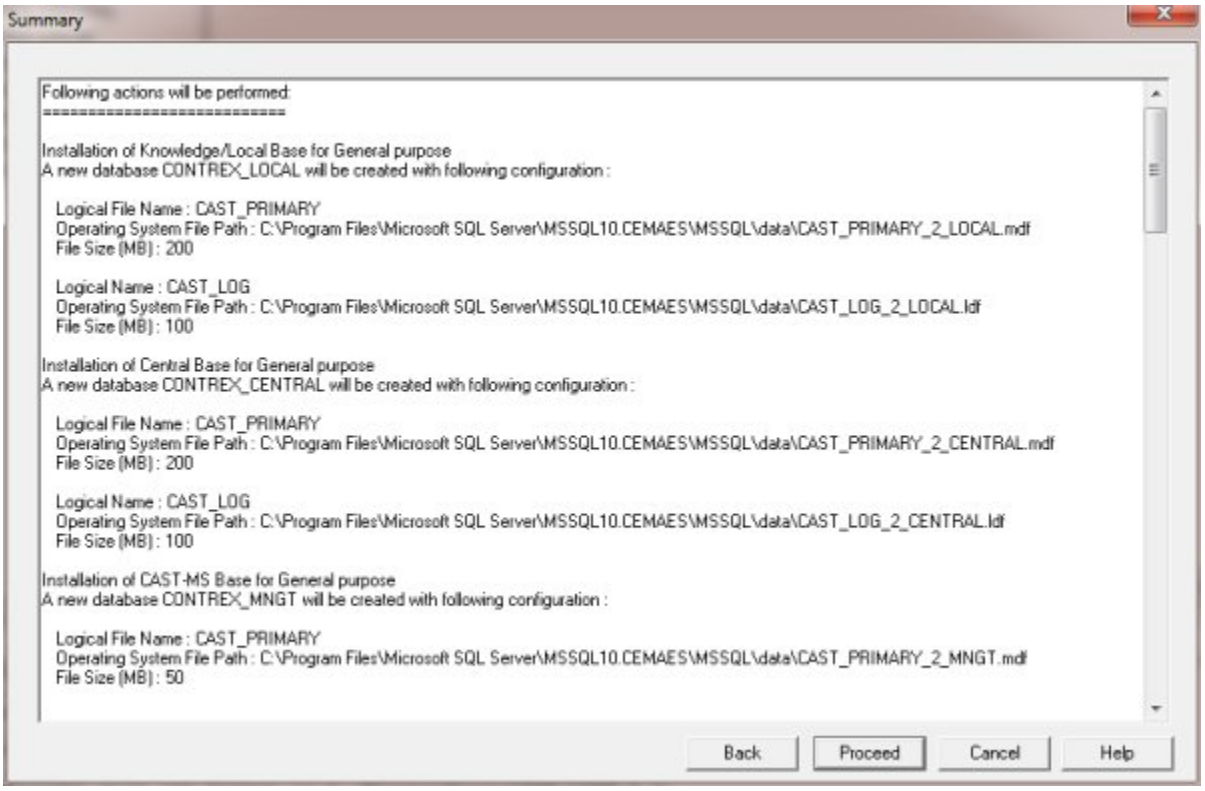


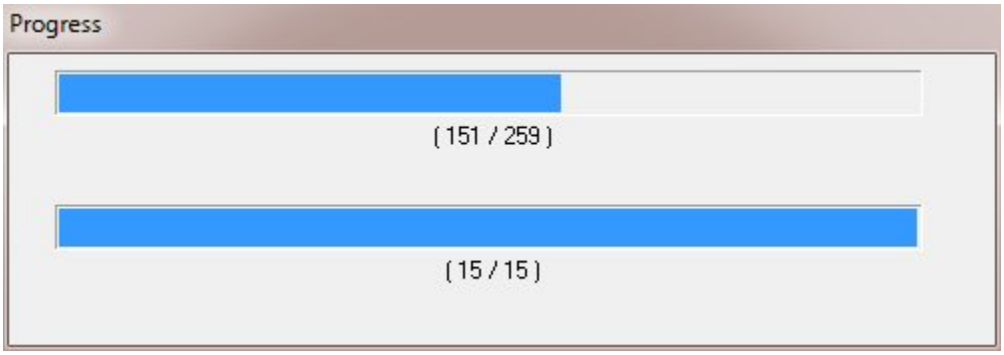
Table Tablespace Name	Select an existing Data Tablespace for tables. By default this is set to the **pg_default** tablespace, but this can be changed by selecting a new Tablespace from the dropdown list. The system tablespace **pg_global** along with any user defined tablespaces are offered in the drop down list. • If you want to use dedicated Data Tablespace just for CAST components - this must be created prior to using CAST Server Manager.
Index Tablespace Name	Select an existing Index Tablespace for indexes. By default this is set to the **pg_default** tablespace, but this can be changed by selecting a new Tablespace from the dropdown list. The system tablespace **pg_global** along with any user defined tablespaces are offered in the drop down list. • If you want to use dedicated Data Tablespace just for CAST components - this must be created prior to using CAST Server Manager.
Temporary Tablespace Name	Select an existing Temporary Tablespace for temporary information. By default this is set to the **pg_default** tablespace, but this can be changed by selecting a new Tablespace from the dropdown list. The system tablespace **pg_global** along with any user defined tablespaces are offered in the drop down list. • If you want to use dedicated Data Tablespace just for CAST components - this must be created prior to using CAST Server Manager.

- A dialog box displaying a summary of the proposed installation will then be displayed. Click **Proceed** to start the component installation:



Installation

- A dialog box will inform you of installation progress:



- When all operations have been successfully completed, CAST Server Manager will display the newly installed schemas together as shown below (the **Measurement Service** will not be visible if you selected the **Additional Analysis platform** installation option):

Schema Name	Installed Product	Upgrade Status
v72_central	Central Base for General purpose (Version: 7.2.0.1)	Up To Date
v72_local	Knowledge/Local Base for General purpose (Version: 7.2.0.1)	Up To Date
v72_measure	Application Analytics Base for General purpose (Version: 7.2.0.1)	Up To Date
v72_mngt	CAST Management Studio Base (Version: 7.2.0.1)	Up To Date

During the installation process, CAST Server Manager will automatically create a **connection profile** to the Management Schema (**<prefix>_MNGT**). This connection profile is stored in a proprietary XML file on the hard drive of the current workstation. When you launch the CAST Management Studio, this connection profile will automatically be displayed for use (you will need to validate it first).

Next steps?

See Initialize the platform preferences in CAST Management Studio.