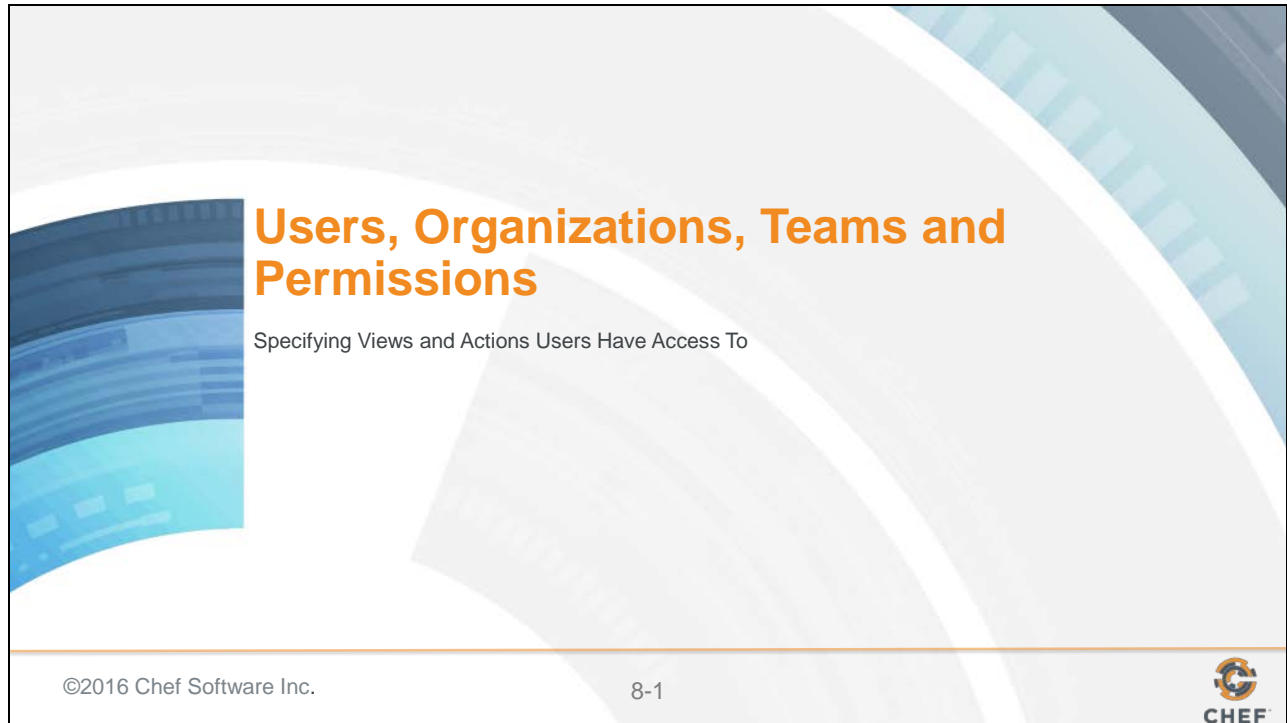


8: Users, Organizations, Teams and Permissions



Instructor Note: While managing users and organizations via a web UI may seem like a trivial topic, in Chef Compliance there is some complexity in how nodes are shared via Organizations. So this hands-on module allows the students to manage users, organizations, and teams so they can see the resulting behavior first hand.

Instructor Note: LDAP integration is scheduled for Q2 2016. As of this writing, users have two options for managing manage users, organizations, and teams--The web UI or via API: https://docs.chef.io/release/compliance_1-0/api_compliance.html#users

Slide 2


Objectives

After completing this module, you should be able to:

- Create users.
- Set user permissions.
- Create and apply organizations.
- Create Teams.
- Set Team permissions.

Slide 3


CONCEPT



Managing Users

You can create and edit Compliance Server users.

You can also modify their permission to allow or prevent certain actions.

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Permissions are used to control what users and organizations can do in the context of Chef Compliance. You can effectively enable or disable permissions to scan systems, update packages, or manage various aspects of Chef Compliance including users and organizations.

Slide 4

EXERCISE



Group Lab: Creating Users

Let's learn by doing. We'll stop along the way to explain details.

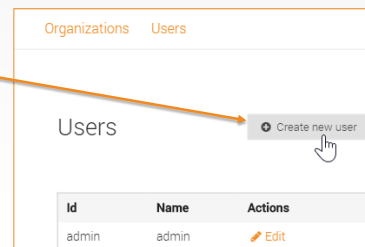
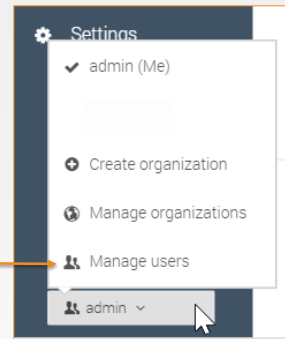
Objectives:

- ☐ Create a new Compliance User.
- ☐ Modify a User's Permissions.

Slide 5

GL: Creating Users

1. From the bottom-left, click the **menu** button and then click **Manage users**.
2. Click **Manage users**.
3. From the resulting screen, click **Create new user**.



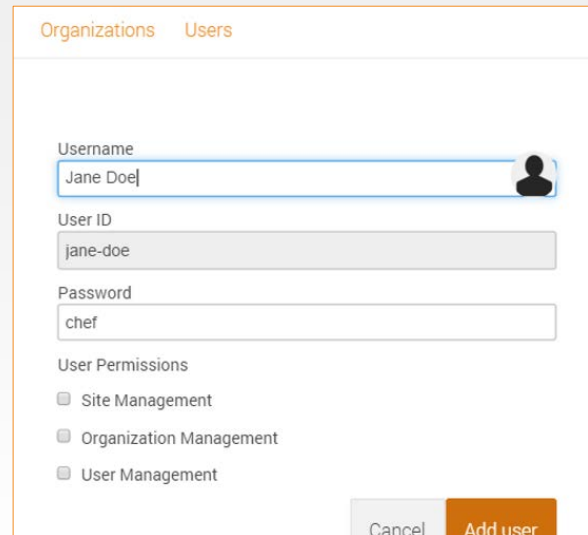
Slide 6

Discussion: Creating Users

The Users/Create screen displays.

A user can have the following permissions:

- ☐ **Site Management** users can do everything.
- ☐ **Organization Management** users can create, edit or delete Organizations.
- ☐ **User Management** users can create, edit or delete users.

A screenshot of the 'Users' tab in the Chef interface. The form contains the following fields: 'Username' with the value 'Jane Doe' and a user icon; 'User ID' with the value 'jane-doe'; and 'Password' with the value 'chef'. Below these is a 'User Permissions' section with three checkboxes: 'Site Management' (checked), 'Organization Management' (unchecked), and 'User Management' (unchecked). At the bottom right are 'Cancel' and 'Add user' buttons.

Organizations Users

Username
Jane Doe

User ID
jane-doe

Password
chef

User Permissions

- ☒ Site Management
- ☐ Organization Management
- ☐ User Management

Cancel Add user

The Site Management permission can be thought of as Administrator-level permissions. It is like a superset of the Organization Management and the User Management permissions.

We will discuss Organizations and their purpose later in this module.

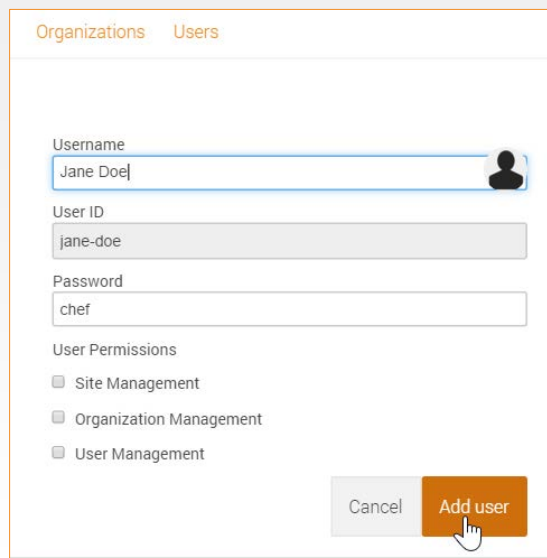
Slide 7

GL: Creating Users

4. From the current Users/Create screen, type a **user name** of your choice and a password you'll remember, like **chef**.

Note: Leave the new user's permissions unchecked for now.

5. Click the **Add user** button.



The screenshot shows the 'Create User' form in the Chef Compliance interface. At the top, there are tabs for 'Organizations' and 'Users'. The form contains the following fields and options:

- Username:** A text input field containing 'Jane Doe' with a user icon to its right.
- User ID:** A text input field containing 'jane-doe'.
- Password:** A text input field containing 'chef'.
- User Permissions:** A section with three unchecked checkboxes:
 - ☐ Site Management
 - ☐ Organization Management
 - ☐ User Management
- Buttons:** At the bottom right, there are two buttons: a grey 'Cancel' button and an orange 'Add user' button. A mouse cursor is pointing at the 'Add user' button.

Slide 8

Discussion: Creating Users

Notice from the current **Users** screen you could edit or delete users.

The bottom image shows the permissions that you can edit for a user.

You could also edit the Username and/or Password but not the user ID.

Reminder: Leave the new user's permissions unchecked for now.

Users Create new user

Id	Name	Actions
admin	admin	Edit
jane-doe	Jane Doe	Edit Delete

Username

Jane Doe

User ID

jane-doe

Password

User Permissions

- ☐ Site Management
- ☐ Organization Management
- ☐ User Management

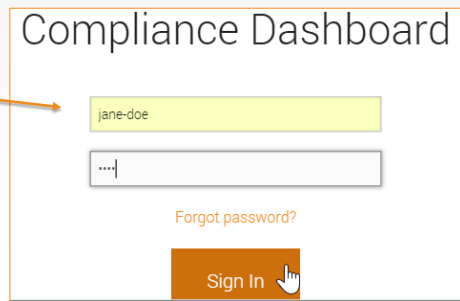
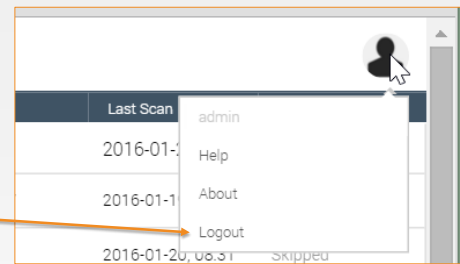
Notice that you can't delete the original admin user, however, since you always need at least an admin user.

We will use this new user in the up coming lab exercises.

Slide 9

GL: Managing Users

6. From the top-right of the Compliance web UI, click the **User** icon and log out.
7. From the resulting login screen, log in with your **new user ID**.



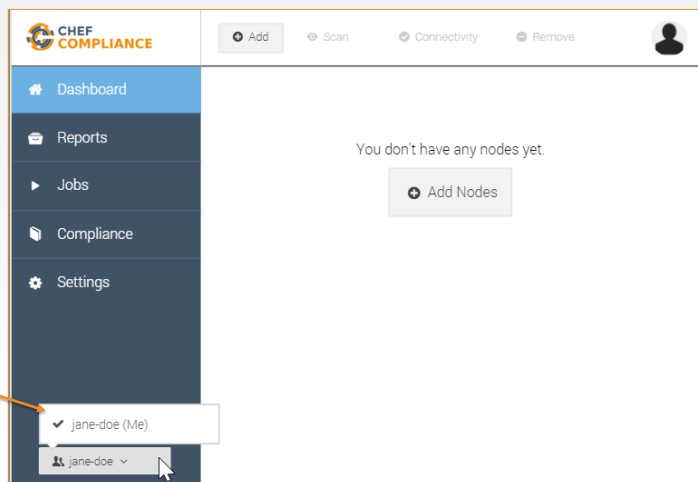
Slide 10

GL: Managing Users

Notice that you cannot access any nodes that were added previously.

Also notice that your current permissions don't allow you to manage users or organizations.

8. Log out and then log back in as the **admin** user.



Slide 11

CONCEPT



Organizations in Chef Compliance

Organizations are objects that enable you to segregate target nodes and make them accessible to users other than just the admin user.

Before you add nodes that you may want to share with other users, you should first create at least one Compliance organization and a corresponding Compliance team to which those nodes will be associated.

In such a scenario, you'll need to switch to the new organization and then add nodes while you are working under that organization.

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As of this writing, the only way to share access to nodes between different user accounts via a combination of an Organization object and its Team object.

Slide 12

EXERCISE



Group Lab: Using Organizations and Teams

Let's keep learning by doing. We'll stop along the way to explain details again.

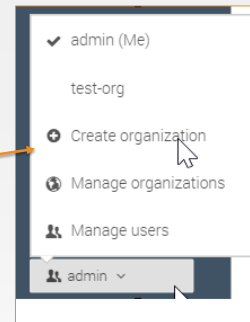
Objectives:

- ☐ Create an Organization.
- ☐ Create a Team.
- ☐ Add a Member to a Team.
- ☐ Add a Node to an Organization.
- ☐ Test a Team Member's Access to a Node.

Slide 13

GL: Creating an Organization

1. From the bottom-left of the Dashboard, click **admin > Create Organization**.
2. Type a new organization name (**chef**) in the Organization name field and then click the **Add organization** button.

A screenshot of the 'Create Organization' form. The form has two tabs: 'Organizations' (selected) and 'Users'. It contains two input fields: 'Organization name' with the value 'chef' and a user icon on the right, and 'Organization ID' with the value 'chef'. At the bottom right are two buttons: 'Cancel' and 'Add organization' (highlighted with a mouse cursor).

Slide 14

GL: Creating an Organization

3. From the resulting screen, click the **Teams** link to add team member to your new organization.
4. Click the **Add user** field and then select your new user name to add it to this team.

Notice that the original admin user is already part of this and any new organization teams.

Organizations Users

Create new organization

Id	Name	Actions
chef	chef	Edit Teams Delete

Teams

Add team

Owners

Member	Actions
admin	Delete

Add user

admin

jane-doe

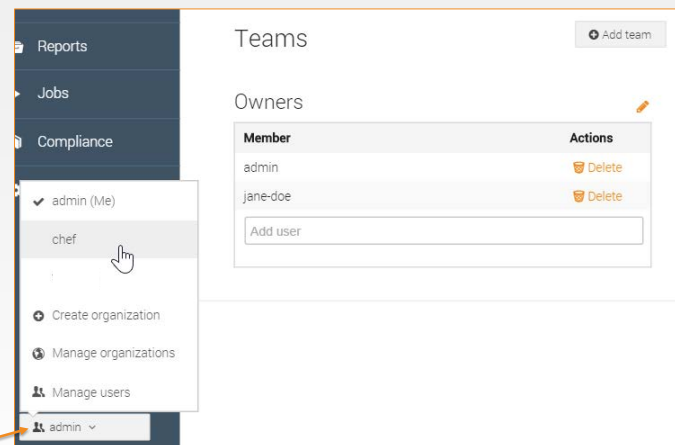
Slide 15

GL: Using Your New Organization

You should now see that your new user name is part of the chef organization's team.

In the next step we'll switch to the new organization so we can add a node to it.

5. From the bottom-left of the web UI, click **admin** and then click your new organization (**chef**) to switch to it.

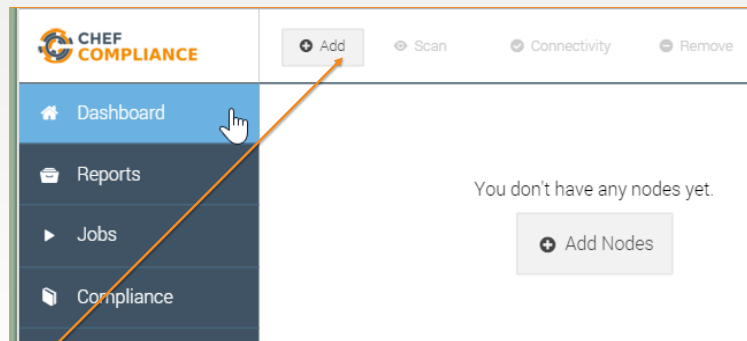


Slide 16

GL: Using Your New Organization

6. Click the Dashboard link and notice that you can no longer see any nodes.

Question: Where have your previous nodes gone?



7. Click the **Add** button to add a node to your organization.

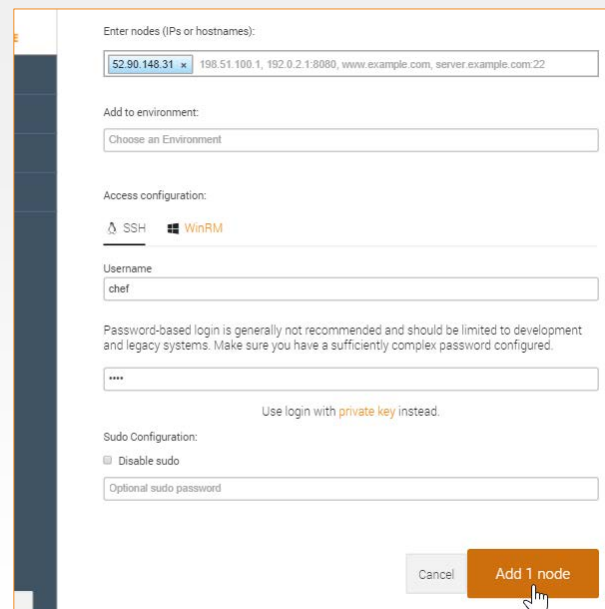
Instructor Note: Answer--The nodes have not gone anywhere. They are only accessible under the admin user's default organization, not under this new `chef` organization. In the next steps we'll add a node to our new organization.

Slide 17

GL: Using Your New Organization

7. Add one of the **target nodes** you were assigned at the beginning of this course and then click the **Add 1 node** button.

Note: Use the same password authentication method as done previously in the course.



The screenshot shows the 'Add node' configuration window in Chef. It includes the following sections:

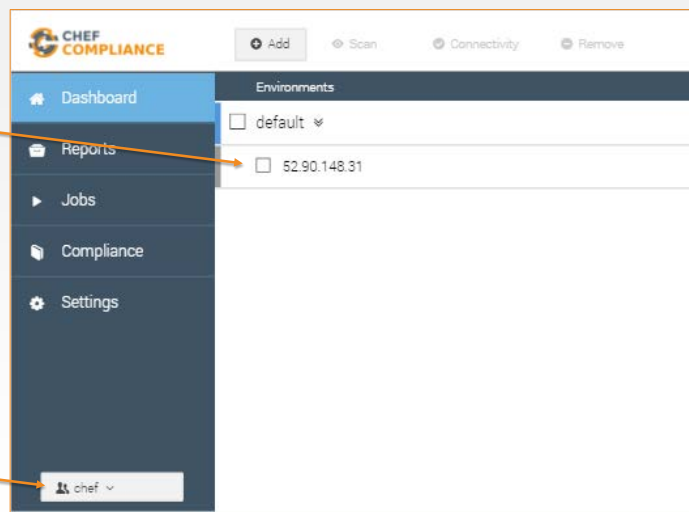
- Enter nodes (IPs or hostnames):** A text input field containing '52.90.148.31 x 198.51.100.1, 192.0.2.1:8080, www.example.com, server.example.com:22'.
- Add to environment:** A dropdown menu labeled 'Choose an Environment'.
- Access configuration:** Radio buttons for 'SSH' (selected) and 'WinRM'.
- Username:** A text input field containing 'chef'.
- Password:** A text input field with masked characters '****'. Below it, a note states: 'Password-based login is generally not recommended and should be limited to development and legacy systems. Make sure you have a sufficiently complex password configured. Use login with private key instead.'
- Sudo Configuration:** A checkbox for 'Disable sudo' (unchecked) and a text input field for 'Optional sudo password'.
- Buttons:** 'Cancel' and 'Add 1 node' (highlighted with a mouse cursor).

Slide 18

GL: Using Your New Organization

You should now see the node you added to your new **chef** organization.

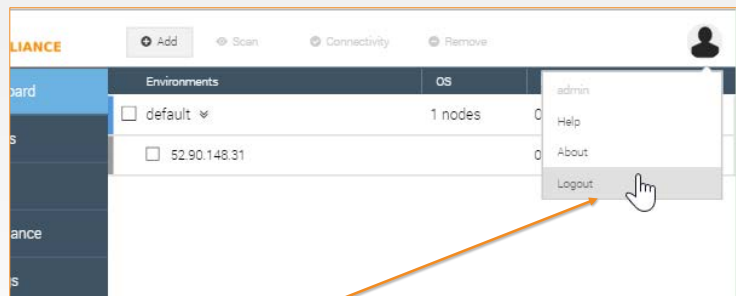
You can also determine which organization you are switched to by looking at the bottom-left of the Chef Compliance Dashboard.



Slide 19

GL: Using Your New Organization

As you may recall, the last time you tried to view nodes while logged in to the Compliance Dashboard with your new user name, you could not see any nodes.



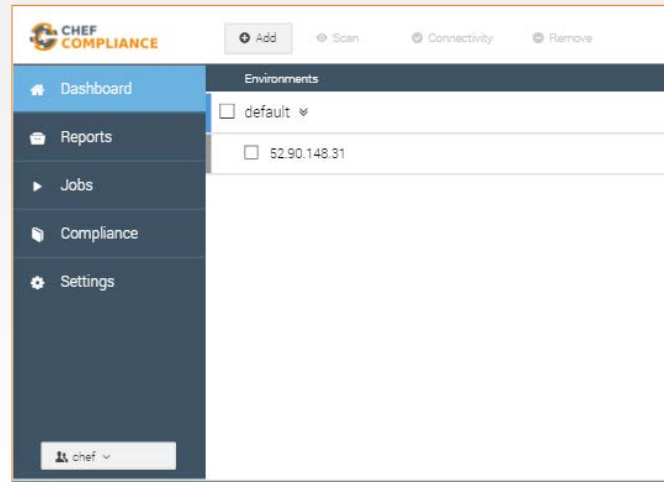
8. Log out of the Compliance Dashboard and log back in with your **new user name**.

Slide 20

GL: Using Your New Organization

While logged in with your new user name, you should now be able to access the node that was created under your new organization.

Question: Do you remember why this is possible?



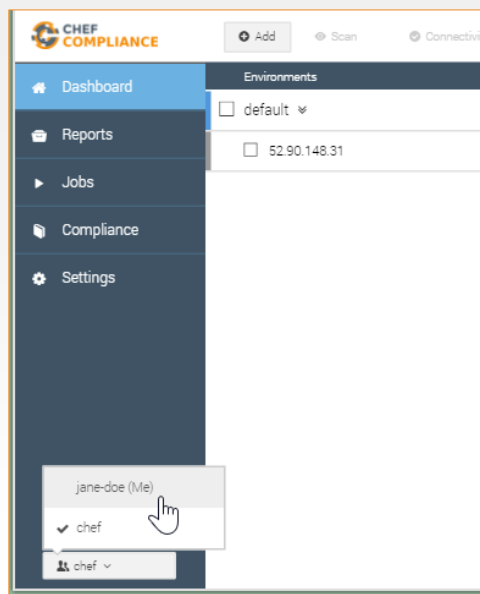
Instructor Note: Answer--Because your new user name is part of the Team object that is resides under the new (chef) organization.

Slide 21

GL: Using Your New Organization

9. From the bottom-left of the Compliance Dashboard, switch back and forth between your new organization and your user name's default organization.

You should only be able to access the node that was created under your new organization.



Slide 22

CONCEPT



Managing Team Permissions

Teams have their own set of permissions.

Team permissions are completely separate and independent of user permissions.

Slide 23

GL: Managing Team Permissions

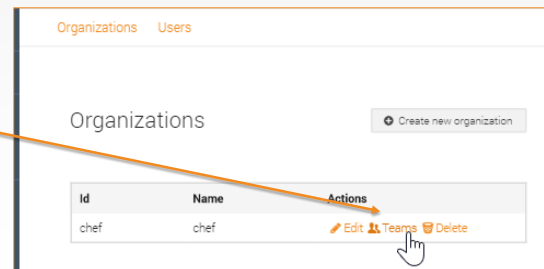
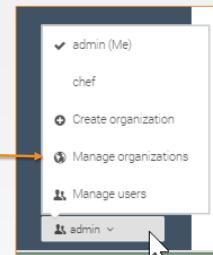
1. Log out of the Compliance Web UI and log back in as **admin**.
2. If you like you can switch back to the admin organization although it really doesn't matter for the next task.



Slide 24

GL: Managing Team Permissions

3. Click **Manage Organizations** from the menu.
4. From the resulting Organizations screen, click the **chef** organization's **Teams** link.



Slide 25

GL: Managing Team Permissions

5. From the resulting Teams screen, click the **pencil** icon.

The team permissions screen should display.

Teams + Add team

Member	Actions
admin	Delete
jane-doe	Delete
<input type="text" value="Add user"/>	

Team name
Owners

Team ID
owners

Team Permissions

- ☒ Node management
- ☒ Compliance scan
- ☒ Patch management
- ☒ Security automation

Cancel Save change

Discussion: Managing Team Permissions

- ☐ The **Node Management** permissions, when checked, enable the team members to add, edit or delete nodes from the dashboard.

- ☐ The **Compliance Scans** permissions, when checked, enable the team members to execute scans.

Team name
Owners

Team ID
owners

Team Permissions

- ☒ Node management
- ☒ Compliance scan
- ☒ Patch management
- ☒ Security automation

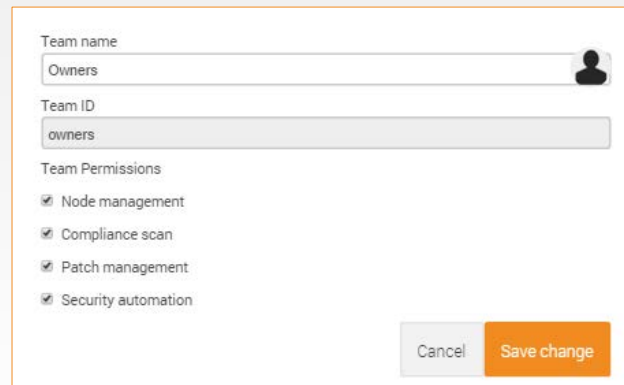
Cancel Save change

When you create a new team, all these permissions are enabled (checked) so if you want to limit team members' permissions listed here, you will need to disable them.

Slide 27

Discussion: Managing Team Permissions

Note: As of this writing, the Patch Management and Security Automation permissions are not fully functional.



Team name
Owners

Team ID
owners

Team Permissions

- ☒ Node management
- ☒ Compliance scan
- ☒ Patch management
- ☒ Security automation

Cancel Save change

Instructor Note: This is what a Compliance SME wrote about the last two permissions listed above: "patch management - execute patch execution (deactivated by default). Security automation - use cookbooks for remediation (not available yet)"

Review Questions

1. How can you share nodes between different user names?
2. Of the following permissions found on the Users/Create screen, which has the highest levels of permissions when enabled?
 - ☐ Organization Management.
 - ☐ User Management.
 - ☐ Site Management.

Instructor Note Answers:

1. By using a combination of an Organization object and its Team object. Teams belong to Organizations so members of teams can then view or manage nodes that have been added to their team's organization.

2. Site Management.

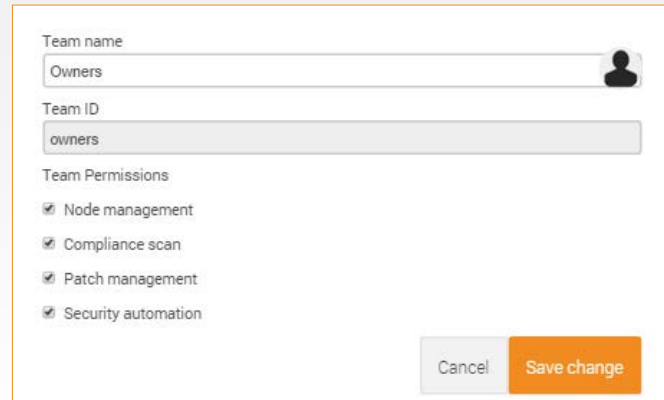
A user can have the following permissions:

- ☐ Organization Management users can create, edit or delete Organizations.
- ☐ User Management users can create, edit or delete users.
- ☐ Site Management users can do everything.

Slide 29

Review Questions

3. Regarding team permissions, what can the **Node management** permission allow?



The screenshot shows a configuration form for a team in Chef Compliance. It includes fields for 'Team name' (containing 'Owners') and 'Team ID' (containing 'owners'). Below these are 'Team Permissions' with four checked options: 'Node management', 'Compliance scan', 'Patch management', and 'Security automation'. At the bottom right are 'Cancel' and 'Save change' buttons.

Field	Value
Team name	Owners
Team ID	owners

Team Permissions

- ☒ Node management
- ☒ Compliance scan
- ☒ Patch management
- ☒ Security automation

Buttons: Cancel, Save change

Instructor Note Answers:

3. The Node Management permissions, when checked, enable the team members to add, edit, or delete nodes from the dashboard.

Slide 30

