NetApp

Identity and access management

BlueXP setup and administration

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Identity and access management

Learn about BlueXP identity and access management

BlueXP identity and access management (IAM) enables you to organize and control access to your NetApp resources. You can organize your resources according to your organization's hierarchy. For example, you can organize resources by geographical location, site, or business unit. You can then assign permissions to members at specific parts of the hierarchy, which prevents access to resources in other parts of the hierarchy.

BlueXP IAM replaces and enhances the previous functionality provided by BlueXP accounts. Learn more about the introduction of BlueXP IAM.

BlueXP IAM is supported when using BlueXP in standard mode. If you're using BlueXP in restricted mode or private mode, then you use a BlueXP *account* to manage users and resources.

- Learn about BlueXP accounts
- Learn about BlueXP deployment modes

How BlueXP IAM works

BlueXP IAM enables you to grant access to your organization's resources by defining which members have permissions to specific parts of the organization's hierarchy. For example, a member can have project admin permissions for a project that has five associated resources.

When using BlueXP IAM, you'll manage the following components:

- The organization
- Folders
- Projects
- Resources
- Members
- Roles and permissions
- Connectors

BlueXP resources are organized hierarchically:

- The organization is the top of the hierarchy.
- Folders are children of the organization or of another folder.
- Projects are children of the organization or of a folder.
- Resources are associated with one or more folders or projects.

The following image illustrates this hierarchy at a basic level.
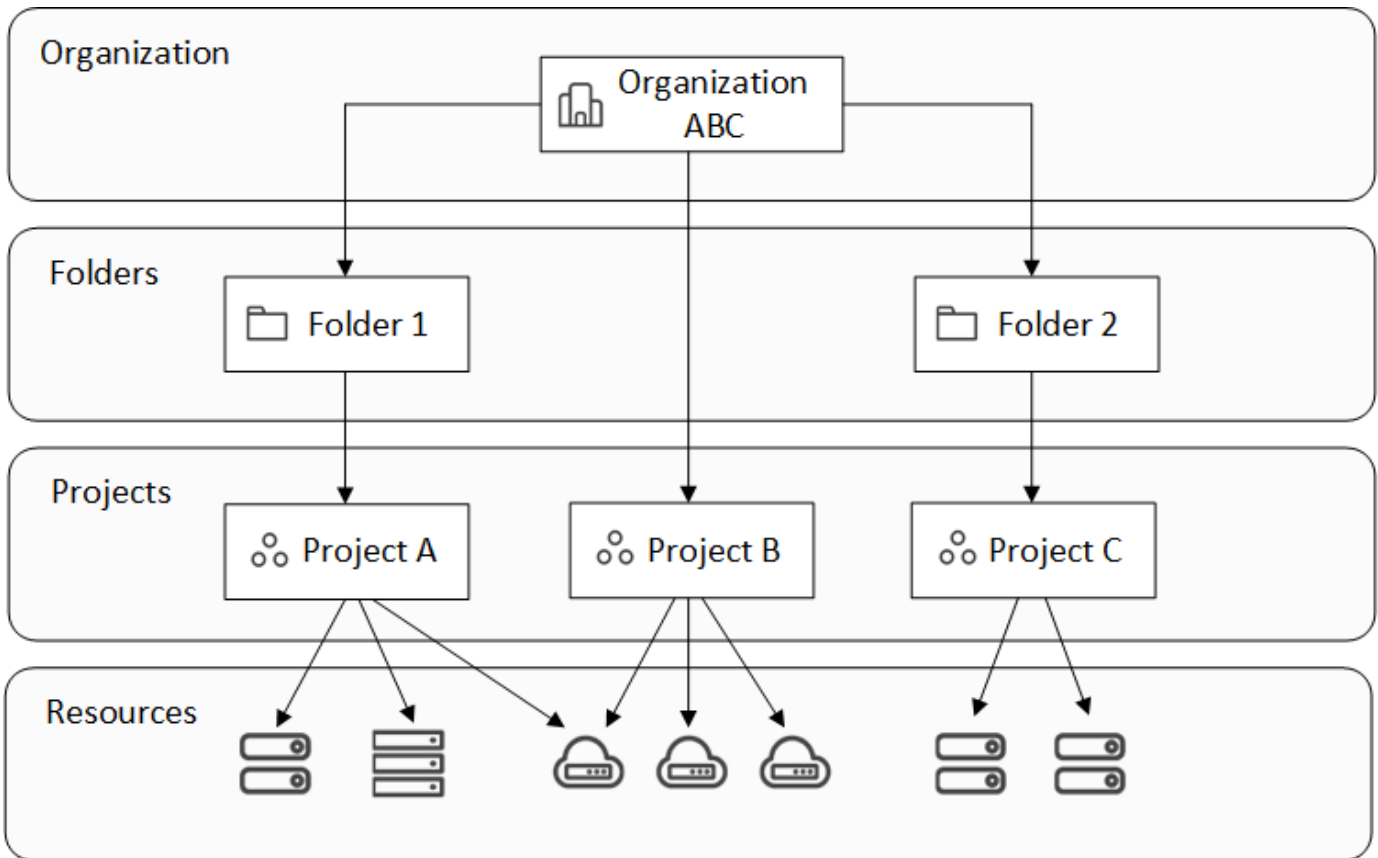
Organization

An *organization* is the top level of BlueXP's IAM system and typically represents your company. Your organization consists of folders, projects, members, roles, and resources. Connectors are associated with specific projects in the organization.

When you sign up to BlueXP, you're prompted to create a new organization.

Folders

A *folder* enables you to group related projects together and separate them from other projects in your organization. For example, a folder might represent a geographical location (EU or US East), a site (London or Toronto), or a business unit (engineering or marketing).

Folders can contain projects, other folders, or a combination of both.

You don't need to create folders. They are optional.

Projects

A *project* represents a workspace in BlueXP that organization members access from the BlueXP canvas in order to manage resources. For example, a project can include a Cloud Volumes ONTAP system, an on-premises ONTAP cluster, or an FSx for ONTAP file system.

An organization can have one or many projects. A project can reside directly underneath the organization or within a folder.

Resources

A *resource* is a working environment that you created or discovered in BlueXP.

When you create or discover a resource, the resource is associated with the currently selected project. That might be the only project that you want to associate this resource with. But you can choose to associate the resource with additional projects in your organization.

For example, you might associate a Cloud Volumes ONTAP system with one additional project or with all projects in your organization. How you associate a resource depends on your organization's needs.

> 💡 You can also associate a Connector with another folder or project in your organization. Learn more about using Connectors with BlueXP IAM.

When to associate a resource with a folder

You also have the option to associate a resource with a folder, but this is optional and meets the needs of a specific use case.

An *Organization admin* might associate a resource with a folder so that a *Folder or project admin* can then associate that resource with the appropriate projects that reside in the folder.

For example, let's say you have a folder that contains two projects:
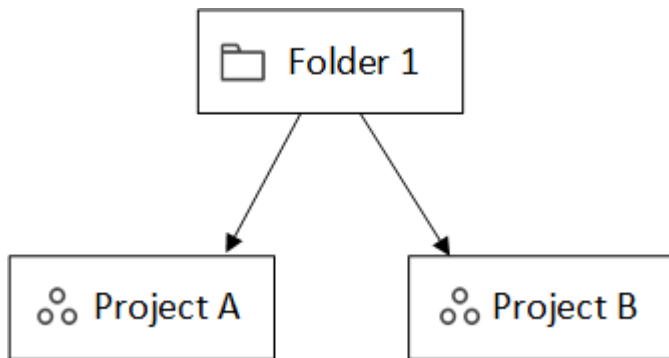

The *Organization admin* can associate a resource with the folder:
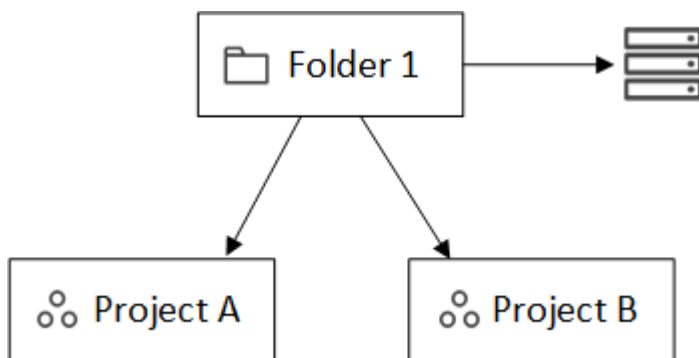
Associating the resource with the folder doesn't automatically make that resource accessible from all projects in the folder. But the *Folder or project admin* can then decide which projects that resource should be made available to. After making that decision, the admin can then associate the resource with the right projects.

In this example, the admin associates the resource with Project A:
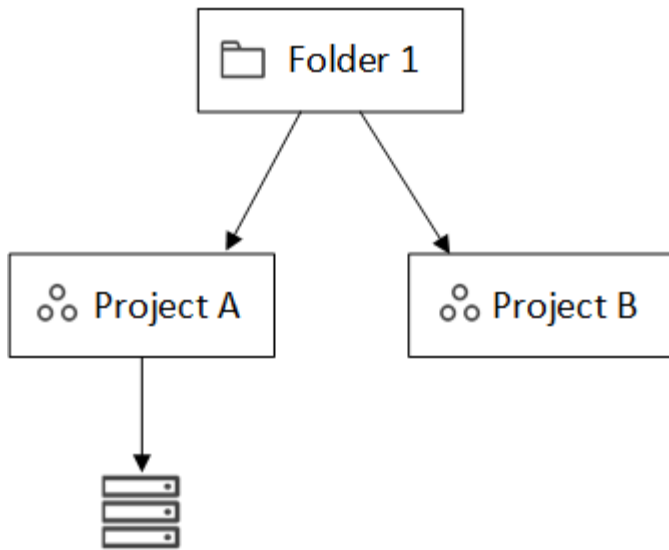
Members who have permissions for project A can now access the resource.

Members

Members of your organization are user accounts or service accounts. A service account is typically used by an application to complete specified tasks without human intervention.

An organization has at least one user with the *Organization admin* role (the user who creates the organization is automatically assigned this role). You can add other members to the organization and assign different permissions across different levels of the resource hierarchy.

Roles and permissions

In BlueXP IAM, you don't grant permissions directly to organization members. Instead, you grant each member a role. A role contains a set of permissions that enables a member to perform specific actions at a specific level of the resource hierarchy.

By providing permissions at a specific part of the resource hierarchy, you can restrict access rights to only the resources that a member needs to complete their tasks.

Where you can assign roles in the hierarchy

When you associate a member with a role, you need to select the entire organization, a specific folder, or a specific project. The role that you select gives a member permissions to the resources in the selected part of the hierarchy.

Role inheritance

When you assign a role, the role is inherited down the organization hierarchy:

Organization
   Roles that you grant at the organization level are inherited by all folders, projects, and resources in the organization. That means the member has permissions to everything in the organization.

Folders
   Roles that you grant at the folder level are inherited by all folders, projects, and resources in the folder.

   For example, if you assign a role at the folder level and that folder has three projects, the member will have

permissions to those three projects and any associated resources.

Projects

Roles that you grant at the project level are inherited by all resources associated with that project.

Multiple roles

You can assign each organization member a role at different levels of the organization hierarchy. It can be the same role or a different role. For example, you can assign a member role A for project 1 and project 2. Or you can assign a member role A for project 1 and role B for project 2.

Predefined roles

BlueXP supports several predefined roles that you can assign to the members of your organization.

Learn about IAM predefined roles.

Connectors

When an *Organization admin* creates a Connector, BlueXP automatically associates that Connector with the organization and the currently selected project. The *Organization admin* automatically has access to that Connector from anywhere in the organization. But if you have other members in your organization with different roles, those members can only access that Connector from the project in which it was created, unless you associate that Connector with other projects.

You might want to make a Connector available to use with another project in the following cases:

- You want to allow members in your organization to use an existing Connector to create or discover additional working environments in another project
- You associated an existing resource with another project and that resource is managed by a Connector

  If a resource that you associated with additional project is discovered using a BlueXP Connector, then you also need to associate the Connector with the project that the resource is now associated with. Otherwise, the Connector and it's associated resource aren't accessible from the BlueXP canvas by members who don't have the *Organization admin* role.

You can create an association from the **Connectors** page in BlueXP IAM:

- Associate a Connector with a project

  When you associate a Connector with a project, that Connector is accessible from the BlueXP canvas when viewing the project.

- Associate a Connector with a folder

  Associating a Connector with a folder doesn't automatically make that Connector accessible from all projects in the folder. Organization members can't access a Connector from a project until you associate the Connector with that specific project.

  An *Organization admin* might associate a Connector with a folder so that the *Folder or project admin* can make the decision to associate that Connector with the appropriate projects that reside in the folder.

IAM examples

The following examples show how you might set up your organization.
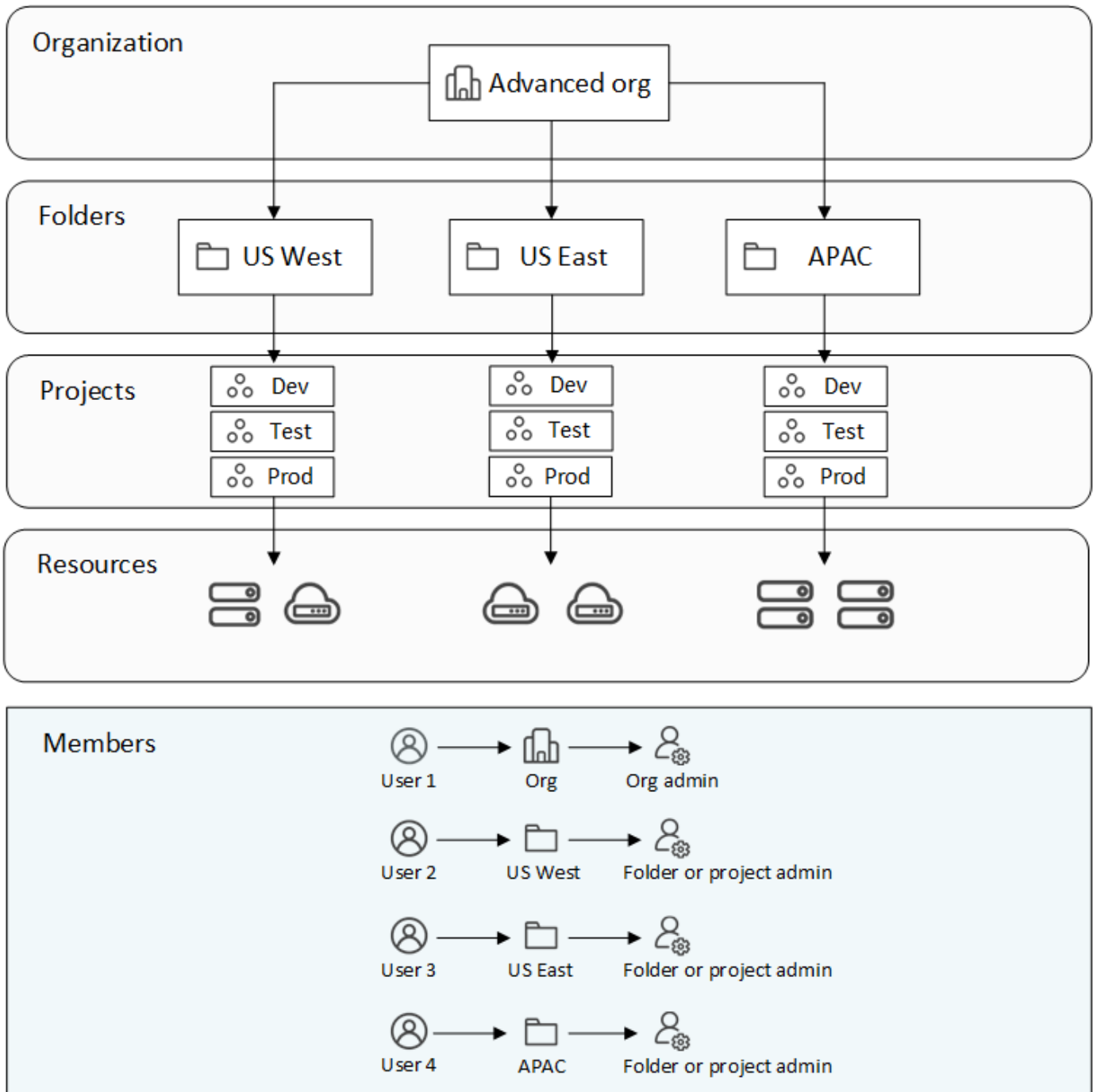
Simple organization

The following diagram shows a simple example of an organization that uses the default project and no folders. A single member manages the entire organization.
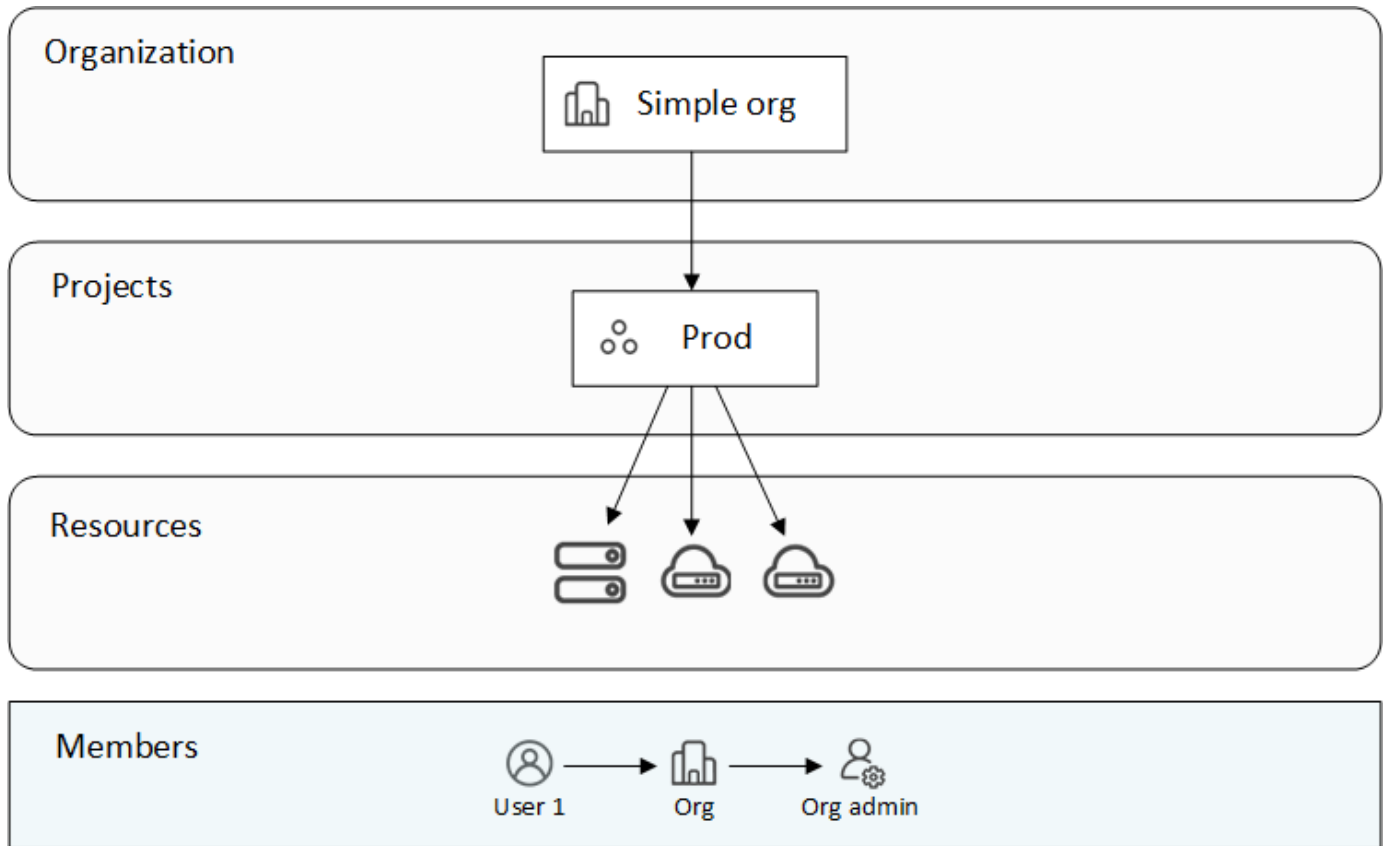
Advanced organization

The following diagram shows an organization that uses folders to organize the projects for each geographic location in the business. Each project has its own set of associated resources. The members include an organization admin and an admin for each folder in the organization.

What you can do with BlueXP IAM

The following examples describe how you might use IAM to manage your BlueXP organization:

- Grant specific roles to specific members so that they can only complete the required tasks.
- Modify member permissions because they moved departments or because they have additional responsibilities.
- Remove a user who left the company.
- Add folders or projects to your hierarchy because a new business unit has added NetApp storage.
- Associate a resource with another project because that resource has capacity that another team can utilize.

- View the resources that a member can access.
- View the members and resources associated with a specific project.

Where to go next

- Get started with BlueXP IAM
- Organize your resources in BlueXP with folders and projects
- Manage BlueXP members and their permissions
- Manage the resource hierarchy in your BlueXP organization
- Associate Connectors with folders and projects
- Switch between BlueXP projects and organizations
- Rename your BlueXP organization
- Monitor or audit IAM activity
- Predefined BlueXP IAM roles
- Learn about the API for BlueXP IAM

Get started with BlueXP identity and access management

When you sign up to BlueXP, you're prompted to create a new organization. The organization includes one member (an Organization admin) and one default project. To set up BlueXP identity and access management (IAM) to meet your business needs, you'll need to customize your organization's hierarchy, add additional members, add or discover resources, and associate those resources across your hierarchy.

You must have **Organization admin** permissions to administer the entire organization from BlueXP IAM. If you have **Folder or project admin** permissions, you can only administer the folders and projects for which you have permissions.

Follow these steps to set up a new BlueXP organization. The order in which you complete these steps might be different, depending on your organization's needs.

1 **Edit the default project or add to your organization's hierarchy**

You can simply use the default project or you can create additional projects and folders that match the hierarchy of your business.

Learn how to organize your resources with folders and projects.

2 **Associate members with your organization**

If multiple people in your business need to access and manage resources from BlueXP, you'll need to associate their user accounts with your organization and provide the appropriate permissions across your resource hierarchy. You also have the option to add service accounts to your organization.

Learn how to manage members and their permissions.

③ Add or discover resources

Add or discover resources in BlueXP as *working environments*. A working environment represents a storage system that organization members manage from within a project. For example, a Cloud Volumes ONTAP system or an on-premises ONTAP cluster.

Learn how to create or discover resources from the BlueXP canvas:

- Amazon FSx for NetApp ONTAP
- Azure NetApp Files
- Cloud Volumes ONTAP
- E-Series systems
- On-premises ONTAP clusters
- StorageGRID

④ Associate resources with additional projects

When you create or discover a resource in BlueXP, that resource is automatically associated with the project that was selected when you created or discovered the working environment. If you want to make that resource available to another project in your organization, then you'll need to create an association between them. If the resource is managed by a Connector, then you also need to create an association between the project and the associated Connector.

- Learn how to manage your organization's resource hierarchy.
- Learn how to associate a Connector with a folder or project.

Related information

- Learn about BlueXP identity and access management
- Learn about the API for BlueXP IAM

Organize your resources in BlueXP IAM with folders and projects

BlueXP identity and access management (IAM) enables you to organize your NetApp resources using projects and folders. A *project* represents a workspace in BlueXP that organization members access to manage *resources* (for example, a Cloud Volumes ONTAP system). A *folder* groups related projects together. After you organize your resources into folders and projects, you can grant granular access to resources by providing organization members with permissions to specific folders and projects.

Add a folder or project

When you create your BlueXP organization, it includes a single project. You can create additional projects to manage your organization's resources. You can optionally create folders to group related projects together.

About this task

The depth of your organization's hierarchy can go down to 7 levels. As a result, you can create nested folders down to 6 levels. The last nested folder can then include projects at the seventh level of the hierarchy.

The following image illustrates the maximum depth of your organization's hierarchy:

Steps

1. In the upper right of the BlueXP console, select ⚙️ > **Identity & Access Management**.

2. From the **Organization** page, select **Add folder or project**.

3. Select **Folder** or **Project**.

4. Provide details about the folder or project:

   ○ **Name and location**: Enter a name and choose a location in the hierarchy for the folder or project. A folder or project can reside directly underneath the organization or within a folder.

   ○ **Resources**: Select the resources that you want to associate with this folder or project.

   You can only select from the resources that are associated with the parent of the folder or project. If the parent is the organization, then you can choose from any resource in the organization. If the parent is a folder, then you can only select from the resources that are associated with the folder.

   Learn when you might associate a resource with a folder.

   ○ **Access**: View the members who will have access to the folder or project based on the existing permissions already defined in your resource hierarchy.

   If needed, select **Add a member** to specify additional organization members who should have access to the folder or project and then select a role. A role defines the permissions that members have for the folder or project.

   Learn about predefined IAM roles.

5. Select **Add**.

Result

BlueXP creates the folder or project and associates the specified resources and members.

View the resources and members associated with a folder or project

To verify that your resources are organized appropriately and accessible to the right members in your organization, you can view which resources and members are associated with a folder or project.

Steps

1. From the **Organization** page, navigate to a project or folder in the table, select ••• and then select **Edit folder** or **Edit project**.

2. On the **Edit** page, view details about associated resources and member access:

- Select **Resources** to view the associated resources. In the table, the **Status** column identifies the resources that are associated with the folder or project.

- Select **Access** to view the members who have access to the folder or project.

What's next?

If needed, you can modify the associated resources or modify member access.

Modify the resources associated with a folder or project

You can modify the resources that are associated with a folder or project by associating or disassociating a resource. For example, you might want to associate a resource with another project because that resource has capacity that another team can utilize.

Before you begin
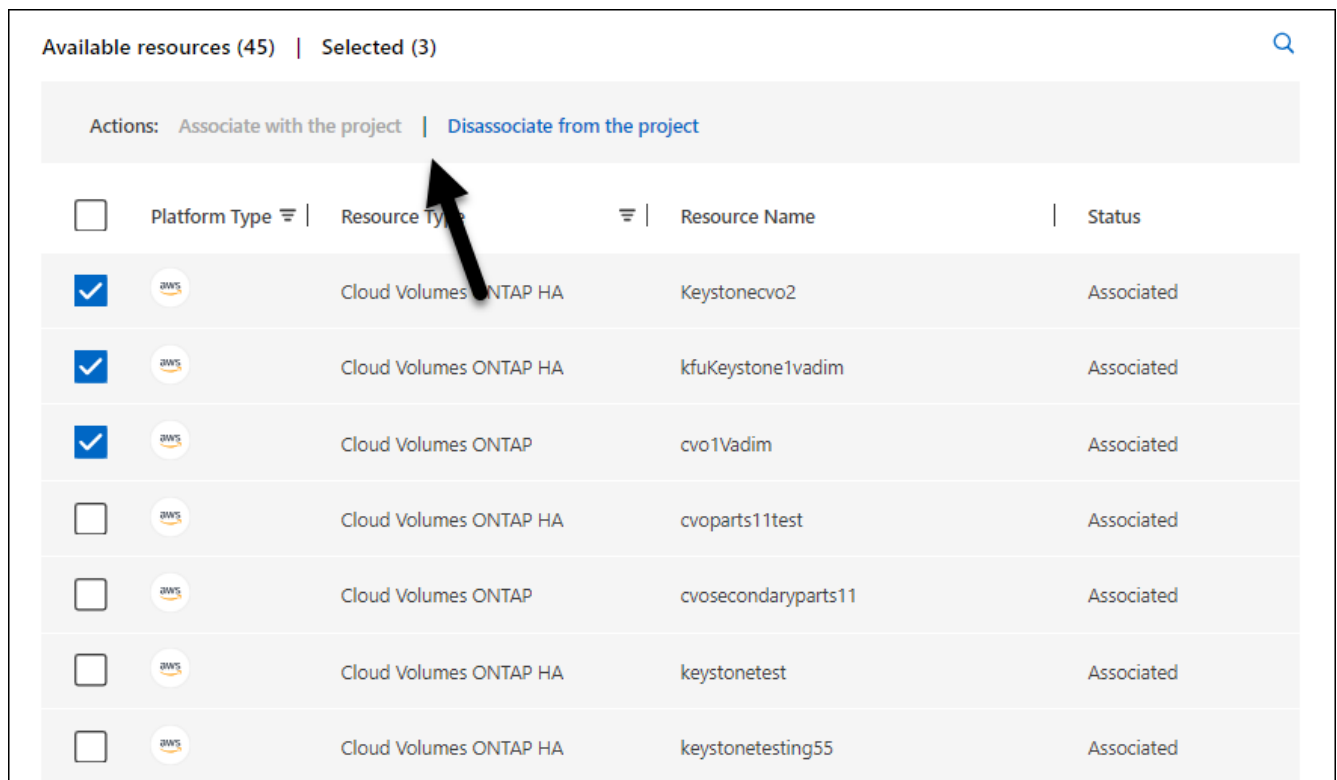
Learn when you might associate a resource with a folder.

Steps

1. From the **Organization** page, navigate to a project or folder in the table, select ••• and then select **Edit folder** or **Edit project**.

2. On the **Edit** page, select **Resources**.

   In the table, the **Status** column identifies the resources that are associated with the folder or project.

3. Select the resources that you'd like to associate or disassociate.

4. Depending on the resources that you selected, select either **Associate with the project** or **Disassociate from the project**.

5. Select **Apply**

Result

BlueXP associates the resources with the folder or project. Organization members who have permissions for that folder or project can now access the associated resources.

Modify member access to a folder or project

Modify member access to a folder or project to ensure that the right members have access to the resources associated with the folder or project.

Steps

1. From the **Organization** page, navigate to a project or folder in the table, select ••• and then select **Edit folder** or **Edit project**.

2. On the **Edit** page, select **Access**.

   BlueXP displays the list of members who have access to the folder or project.

3. Modify member access:

   ◦ **Add a member**: Select the member that you'd like to add to the folder or project and assign them a role.

   ◦ **Change a member's role**: For any members with a role other than Organization Admin, select their existing role and then choose a new role.

     If a role was provided at a higher level of the hierarchy (at the folder or organization level), then you should consider whether to change the role at the lower level or the higher level. For example, if you assigned the *Folder or project admin* role at the folder level, changing the role at the project level to lower-level permissions won't alter the permissions for the member. Because roles are inherited down the organization hierarchy, the member would still have admin permissions at the project level.

     Learn more about role inheritance.

   ◦ **Remove member access**: For members who have a role defined at the folder or project for which you're viewing, you can remove their access.

     If member access was provided at a higher level of the hierarchy (at the folder or organization level), then you can't remove member access when viewing this folder or project. You need to switch to that part of the hierarchy. Alternatively, you can manage permissions from the Members page.

4. Select **Apply**.

Result

BlueXP updates the members who have access to the folder or project.
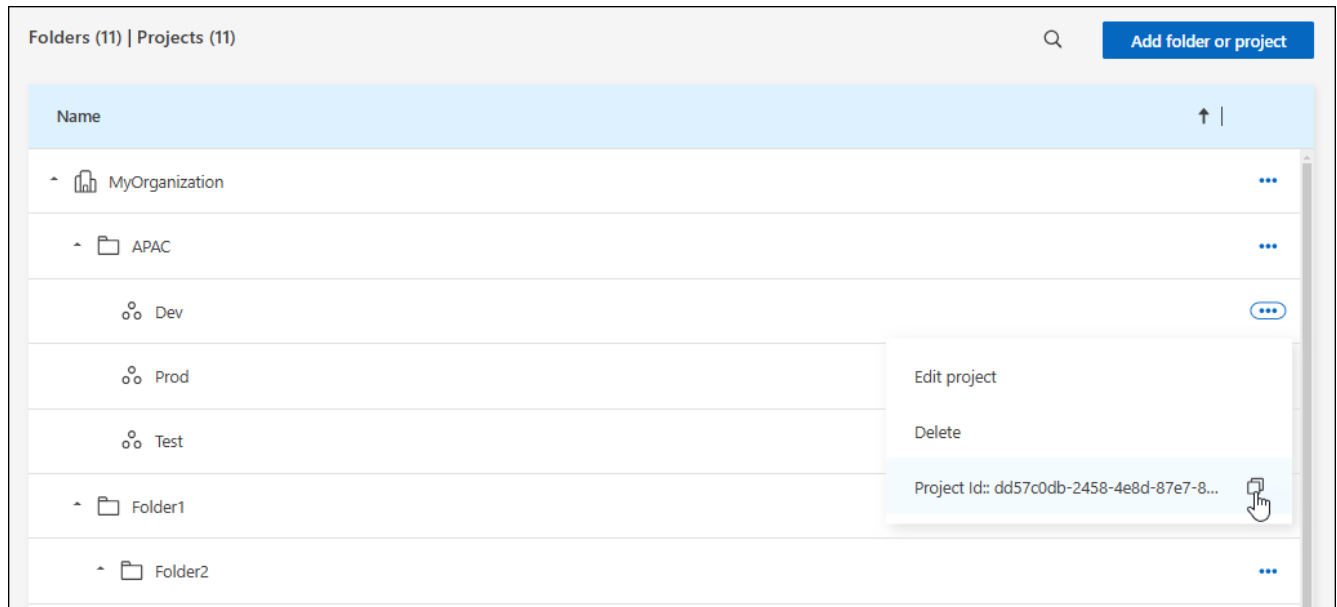
Obtain the ID for a project

If you're using the BlueXP API, you might need to obtain the ID for a project. For example, when creating a Cloud Volumes ONTAP working environment.

Steps

1. From the **Organization** page, navigate to a project in the table and select •••

   The project ID displays.

2. To copy the ID, select the copy button.

Rename a folder or project

If needed, you can change the name of your folders and projects.

Steps

1. From the **Organization** page, navigate to a project or folder in the table, select ••• and then select **Edit folder** or **Edit project**.

2. On the **Edit** page, enter a new name and select **Apply**.

Result

BlueXP updates the name of the folder or project.

Delete a folder or project

You can delete the folders and projects that you no longer need.

Before you begin

- The folder or project must not have any associated resources. Learn how to disassociate resources.
- A folder must not contain any subfolders or projects. You need to delete those folders and projects first.

Steps

1. From the **Organization** page, navigate to a project or folder in the table, select ••• and then select **Delete**.

2. Confirm that you want to delete the folder or project.

Result

BlueXP deletes the folder or project. That folder or project is no longer available to organization members.

Related information

- Learn about BlueXP identity and access management
- Get started with BlueXP IAM

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Add BlueXP IAM members and manage their permissions

BlueXP identity and access management (IAM) enables you to add members to your organization and assign them one or more roles across your resource hierarchy. A *role* contains a set of permissions that enables a member to perform specific actions at a specific level of the resource hierarchy. You can associate new user accounts and service accounts, manage member roles, and more.

> To ensure that you don't lose access to your BlueXP organization, it's a best practice to have two members with the Organization admin role.

About this task

When a *Folder or project admin* views the **Members** page, the page displays all members in the organization. However, a member with this role can only view and manage member permissions for the folders and projects for which they have permissions. Learn more about the actions that a *Folder or project admin* can complete.

Add members to your organization

You can add two types of members to your organization: a user account and a service account. A service account is typically used by an application to complete specified tasks without human intervention.

User account

Steps

1. If the user hasn't already done so, ask them to go to the NetApp BlueXP website and sign up.

   When the user signs up, they should complete the **Sign up** page, verify their email address, and then log in. When prompted to create an organization, the user should close out of BlueXP and let you know that they've created their user account. You can then add the user to your existing BlueXP organization.

   Learn how to sign up to BlueXP.

2. In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.

3. Select **Members**.

4. Select **Add a member**.

5. To add the member, complete the steps in the dialog box:

   ◦ **Entity Type**: Keep **User** selected.

   ◦ **User's email**: Enter the user's email address that is associated with the BlueXP login that they created.

   ◦ **Select an organization, folder, or project**: Choose the level of your resource hierarchy that the member should have permissions for.

     Note the following:

     ▪ You can only select from the folders and projects for which you have admin permissions.

     ▪ If you select the organization or a folder, the member will have permissions to everything that resides within the organization or folder.

   ◦ **Select a role**: Choose a role that provides the member with permissions for the resources that are associated with the organization, folder, or project that you selected.

     ▪ If you selected the organization, you can choose from any role other than **Folder or project admin**.

     ▪ If you selected a folder or project, you can choose from any role other than **Organization admin**.

     Learn about predefined IAM roles.

   ◦ **Add role**: If you want to provide access to additional folders or projects within your organization, select **Add role**, specify another folder or project, and then choose a role.

6. Select **Add**.

Result

BlueXP adds the user to the organization.

What's next?

The user should receive an email from NetApp BlueXP. The email includes information that the member can use to access BlueXP.

Service account

1.
   In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.

2. Select **Members**.

3. Select **Add a member**.

4. To add the member, complete the steps in the dialog box:

   ◦ **Entity Type**: Select **Service account**.

   ◦ **Service account name**: Enter a name for the service account.

   ◦ **Select an organization, folder, or project**: Choose the level of your resource hierarchy that the member should have permissions for.

     Note the following:

     ▪ You can only select from the folders and projects for which you have admin permissions.

     ▪ If you select the organization or a folder, the member will have permissions to everything that resides within the organization or folder.

   ◦ **Select a role**: Choose a role that provides the member with permissions for the resources that are associated with the organization, folder, or project that you selected.

     ▪ If you selected the organization, you can choose from any role other than **Folder or project admin**.

     ▪ If you selected a folder or project, you can choose from any role other than **Organization admin**.

     Learn about predefined IAM roles.

   ◦ **Add role**: If you want to provide access to additional folders or projects within your organization, select **Add role**, specify another folder or project, and then choose a role.

5. Select **Add**.

6. Download or copy the client ID and client secret.

   The client secret is visible only once and is not stored anywhere by BlueXP. Copy or download the secret and store it safely. Note that you can recreate the client ID and client secret later on as needed.

7. Select **Close**.

Result

BlueXP adds the service account to your organization.

View organization members

You can view a list of all members in your BlueXP organization. To understand which resources and permissions are available to a member, you can view the roles assigned to the member at different levels of your organization's resource hierarchy.

About this task

The **Members** page shows details about two types of members: user accounts and service accounts.

Steps

1. In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.
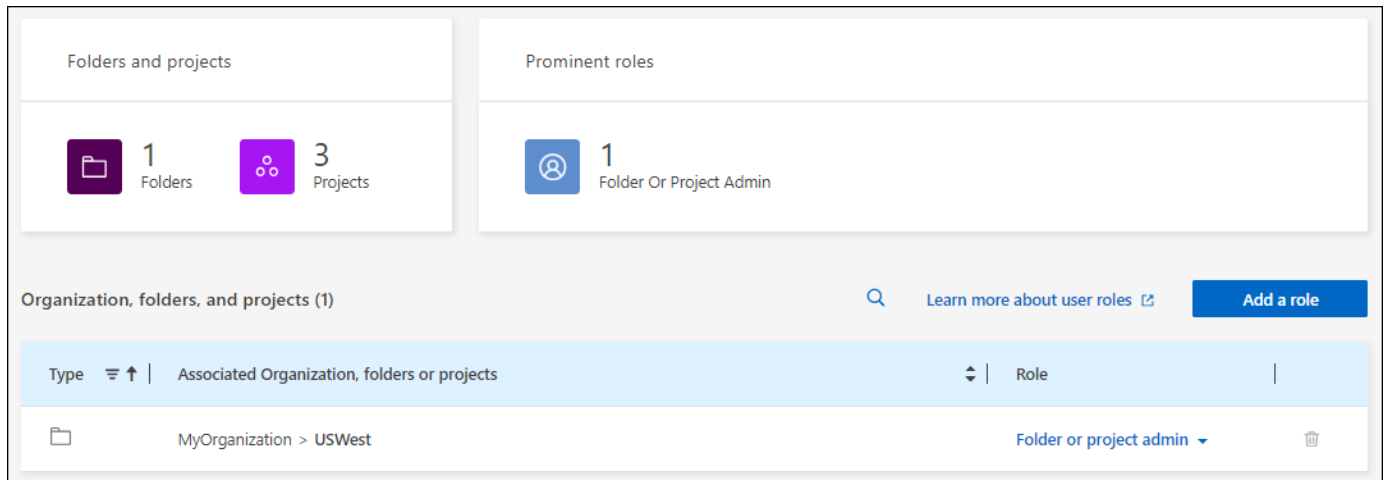2. Select **Members**.

   The members of your organization appear in the **Members** table.

3. From the **Members** page, navigate to a member in the table, select ••• and then select **View details**.
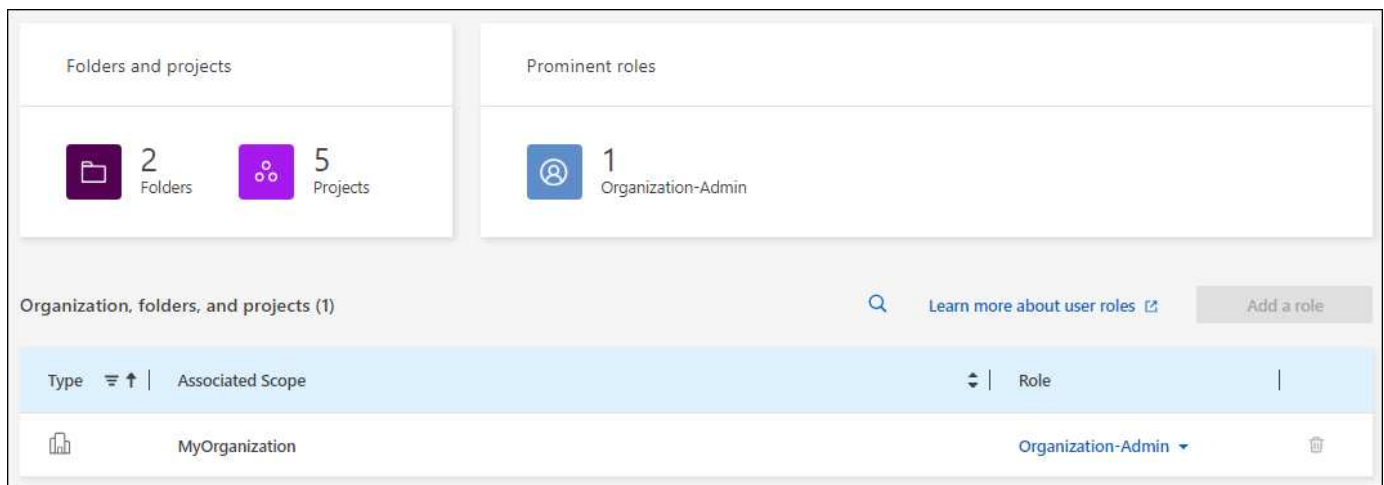
Result

BlueXP displays details about the member, which includes the folders and projects that the member has permissions for across your organization's resource hierarchy.

Here's an example of a member who is assigned the *Folder or project admin* role for a folder, which provides permissions to the three projects in the folder.

Here's another example that shows a member who has the Organization admin role, which gives the user access to all resources in the organization.

Related information

View all of the members associated with a specific folder or project.

Manage a member's permissions

A role defines the permissions assigned to a member at the organization, folder, or project level. Each organization member can have a role assigned at different levels of the organization hierarchy. It can be the same role or a different role. For example, you can assign a member role A for project 1 and role B for project 2.

> A member who is assigned the Organization admin role can't be assigned any additional roles. They already have permissions across the entire organization.

Add a role to a member

Provide a member with additional permissions in your organization by adding roles that apply to the organization, folder, or project level.

Steps

1. From the **Members** page, navigate to a member in the table, select ••• and then select **Add a role**.

2. To add a role, complete the steps in the dialog box:

   ◦ **Select an organization, folder, or project**: Choose the level of your resource hierarchy that the member should have permissions for.

   If you select the organization or a folder, the member will have permissions to everything that resides within the organization or folder.

   ◦ **Select a role**: Choose a role that provides the member with permissions for the resources that are associated with the organization, folder, or project that you selected.

      ▪ If you selected the organization, you can choose from any role other than **Folder or project admin**.

      ▪ If you selected a folder or project, you can choose from any role other than **Organization admin**.

      Learn about predefined IAM roles.

   ◦ **Add role**: If you want to provide access to additional folders or projects within your organization, select **Add role**, specify another folder or project, and then choose a role.

3. Select **Add new roles**.

Result

BlueXP adds the roles. The member now has permissions for the resources in the organization, folder, or project that you selected.

Change from one role to another

If you need to modify a member's permissions, you can change the role that's associated with that member at the organization, folder, or project level.

If you need to change the roles for multiple members in your organization, you can use a bulk action to complete the changes all at once.

One member

Steps

1. From the **Members** page, navigate to a member in the table, select ••• and then select **View details**.

2. In the table, navigate to the organization, folder, or project and then select a new role.

Result

BlueXP updates the roles associated with that member at the organization, folder, and project level.

Multiple members

Steps

1. From the **Organization** page, navigate to a project or folder in the table, select ••• and then select **Edit organization**, **Edit folder**, or **Edit project**.

2. On the **Edit** page, select **Access**.

3. Select all members or individually select two or more members.

4. Select **Define role**.
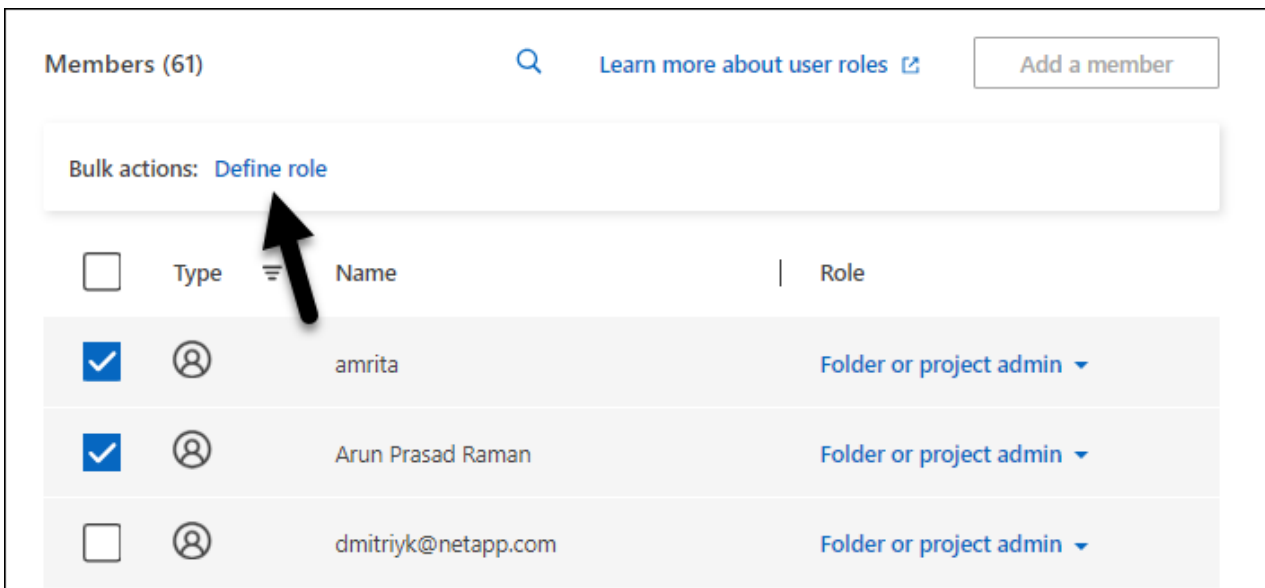
5. Select the role that you'd like to assign to the members and then select **Define**.

Result

BlueXP updates the roles for all of the members that you selected.

Remove permissions for a folder or project

You can remove a member's permissions to a specific folder or project by removing their role.

About this task

If a member has permissions in your organization to *only* one folder or project, you can't remove that role. You have two choices:

- If you want the member to have permissions to another part of the resource hierarchy, you need to add that role first and then delete the existing role.

- If you don't want the member to have permissions to anything, then you can simply remove the member from your organization.

Steps

1. From the **Members** page, navigate to a member in the table, select ••• and then select **View details**.

2. In the table, navigate to the folder or project level and then select 🗑

Result

BlueXP removes permissions for that member at the folder or project level.

Recreate the credentials for a service account

You can recreate the credentials (client ID and client secret) for a service account at any time. You might recreate the credentials if you lost them or if your business requires that you rotate security credentials after a period of time.

About this task

Recreating the credentials deletes the existing credentials for the service account and then creates new credentials. You will not be able to use the previous credentials.

Steps

1. In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.

2. Select **Members**.

3. In the **Members** table, navigate to a service account, select ••• and then select **Recreate secrets**.

4. Select **Recreate**.

5. Download or copy the client ID and client secret.

   The client secret is visible only once and is not stored anywhere by BlueXP. Copy or download the secret and store it safely.

6. Select **Close**.

Result

A new client ID and client secret are now associated with the service account.

Remove a member from your organization

You might need to remove a member from your organization—for example, if they left your company.

About this task

This task doesn't delete the member's BlueXP account or NetApp Support Site account. It simply removes the member and their associated permissions from your organization.

Steps

1. From the **Members** page, navigate to a member in the table, select ••• and then select **Delete user**.

2. Confirm that you want to remove the member from your organization.

Result

BlueXP removes the member. If that member logs in to BlueXP again, they no longer have access to your

BlueXP organization.

Related information

- [Learn about BlueXP identity and access management](#)
- [Get started with BlueXP IAM](#)
- [Predefined BlueXP IAM roles](#)
- [Learn about the API for BlueXP IAM](#)

Manage the resource hierarchy in your BlueXP organization

When you use BlueXP identity and access management (IAM) to associate a member with your organization, you provide permissions at the organization, folder, or project level. To ensure that those members have permissions to access the right resources, you'll need to manage the resource hierarchy of your organization by associating resources with specific projects and folders. A *resource* is a working environment that BlueXP already manages.

View the resources in your organization

To start managing your resource hierarchy, you should be aware of the resources that are associated with your organization.

Steps

1. In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.

2. Select **Resources**.

Result
The resources associated with your organization display in the **Resources** table.

What's next?
To find a specific resource, you can [search and filter the contents of the table](#).

After you've found the resource that you're looking for, you can complete any of the following actions:

- [View the folders and projects that are associated with the resource](#)
- [Associate the resource with additional folders and projects](#)
- [Remove the resource from a folder or project](#)

Find specific resources in your organization

If you have a large number of resources in your organization, you can use the search and filter options to find a specific resource.

Steps

1. From the **Resources** page, select **Advanced Search & Filtering**.

2. Use any of the available options to find the resource that you're looking for:

- **Search by resource name**: Enter a text string and select **Add**.
- **Platform**: Select one or more platforms, such as Amazon Web Services.
- **Resources**: Select one or more resources, such as Cloud Volumes ONTAP.
- **Organization, folder, or project**: Select the entire organization, a specific folder, or a specific project.
3. Select **Search**.

Result

The contents of the Resources table refreshes to show the resources that match your search and filter selections.

Associate a resource with folders and projects

If you want to make a resource available to another folder or project in your organization, then you'll need to create an association between the folder or project and the resource.

Before you begin

You should understand how resource association works. Learn about resources, including when to associate a resource with a folder.

Steps

1. From the **Resources** page, navigate to a resource in the table, select ••• and then select **Associate to folders or projects**.
2. Select a folder or project and then select **Accept**.
3. To associate an additional folder or project, select **Add folder or project** and then select the folder or project.

   Note that you can only select from the folders and projects for which you have admin permissions.

4. Select **Associate resources**.

Result

BlueXP associates the resource with the selected folders and projects.

- If you associated the resource with projects, members who have permissions for those projects now have the ability to access the resource in BlueXP.
- If you associated the resource with a folder, a *Folder or project admin* can now access the resource from within BlueXP IAM. Learn about associating a resource with a folder.

After you finish

If the resource that you associated is discovered using a BlueXP Connector and you have other members in your organization, then you also need to associate the Connector with the project that the resource is now associated with. Otherwise, the Connector and it's associated resource aren't accessible from the BlueXP canvas by members who don't have the *Organization admin* role.

Learn how to associate a Connector with a folder or project.

View the folders and projects associated with a resource

To identify where a resource is available in your organization's hierarchy, you can view the folders and projects that are associated with that resource.
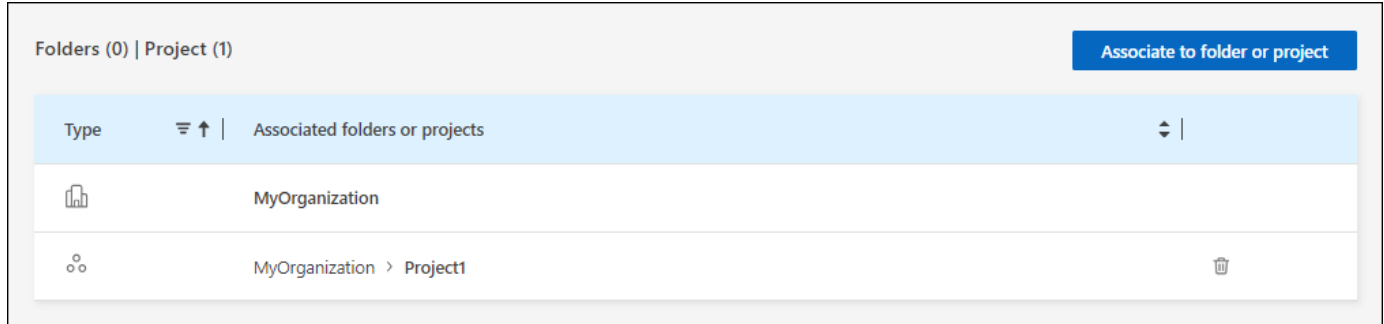
Steps

1. From the **Resources** page, navigate to a resource in the table, select ••• and then select **View details**.

Result

BlueXP displays the folders and projects that are associated with the resource.

The following example shows a resource that is associated with one project.

Folders (0) | Project (1)		Associate to folder or project
Type ≡ ↑ | **Associated folders or projects**		↕ |
🏢	MyOrganization	
⚬⚬	MyOrganization › Project1	🗑

What's next?

- You can associate the resource with an additional project or folder.
- You can remove the resource from a specific folder or project.
- If you need to determine which organization members have access to the resource, you can view the members who have access to the folders and projects that are associated with the resource.

Remove a resource from a folder or project

To remove a resource from a folder or project, you need to remove the association between the folder or project and the resource. After you remove the association, organization members can no longer manage the resource from the folder or project.

About this task

If you want to remove a discovered resource from the entire organization, you need to remove the working environment from the BlueXP canvas.

Steps

1. From the **Resources** page, navigate to a resource in the table, select ••• and then select **View details**.
2. For the folder or project for which you want to remove the resource, select 🗑
3. Confirm that you want to remove the association by selecting **Delete**.

Result

BlueXP removes the association. Members can no longer access the resource from that folder or project.

Related information

- Learn about BlueXP identity and access management
- Get started with BlueXP IAM
- Learn about the API for BlueXP IAM

Associate a BlueXP Connector with other folders and projects

A Connector is required to manage several types of working environments from BlueXP. When an *Organization admin* creates a Connector, BlueXP automatically associates that Connector with the organization and the currently selected project. The *Organization admin* automatically has access to that Connector from anywhere in the organization. Other members in your organization can only access that Connector from the project in which it was created, unless you associate that Connector with other projects from BlueXP identity and access management (IAM).

Before you begin

You should understand how Connector association works. Learn about using Connectors with BlueXP IAM.

About this task

- When a *Folder or project admin* views the **Connectors** page, the page displays all Connectors in the organization. However, a member with this role can only view and associate Connectors with the folders and projects for which they have permissions. Learn more about the actions that a *Folder or project admin* can complete.

Steps

1. In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.

2. Select **Connectors**.

3. From the table, find the Connector that you want to associate.

   To find a specific Connector, you can use the search that's above the table and filter the contents of the table by selecting a specific part of the resource hierarchy.

4. To first view the folders and projects that the Connector is associated with, select ••• and then select **View details**.

   BlueXP displays details about the folders and projects that the Connector is associated with.

5. Select **Associate to folder or project**.

6. Select a folder or project and then select **Accept**.

7. To associate the Connector with an additional folder or project, select **Add a folder or project** and then select the folder or project.

8. Select **Associate Connector**.

Result

BlueXP associates the Connector with the selected folders and projects. Members who have permissions for those folders and projects now have the ability to select that Connector.

After you finish

If you want to associate the resources that the Connector manages with the same folders and projects, you can do so from the Resources page.

Learn how to associate a resource with folders and projects.

Related information

- [Learn about BlueXP Connectors](#)
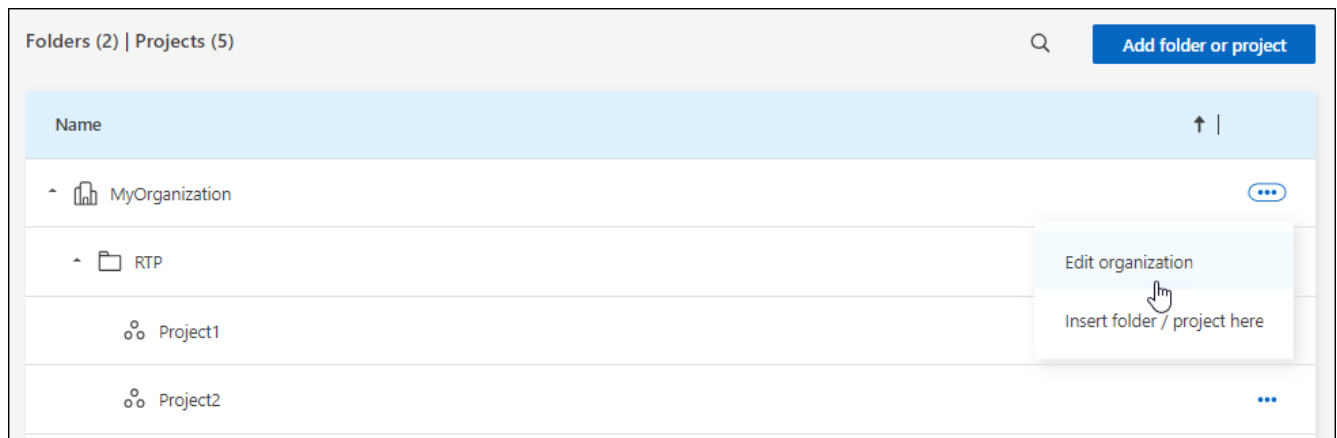- [Learn about BlueXP identity and access management](#)
- [Get started with BlueXP IAM](#)
- [Learn about the API for BlueXP IAM](#)

Switch between BlueXP organizations, projects, and Connectors

You might belong to multiple BlueXP organizations or have permissions to access multiple projects or Connectors within a BlueXP organization. When needed, you can easily switch between organizations, projects, and Connectors to access the resources associated with that organization, project, or Connector.

> 💡 You might belong to multiple organizations if you were invited to join another organization or if you created an additional organization yourself. You can create an additional organization by using the API. [Learn how to create a new organization](#)

Switch between organizations

If you are a member of multiple organizations, you can switch between them at any time.

Steps

1. At the top of BlueXP, select **Organization**.
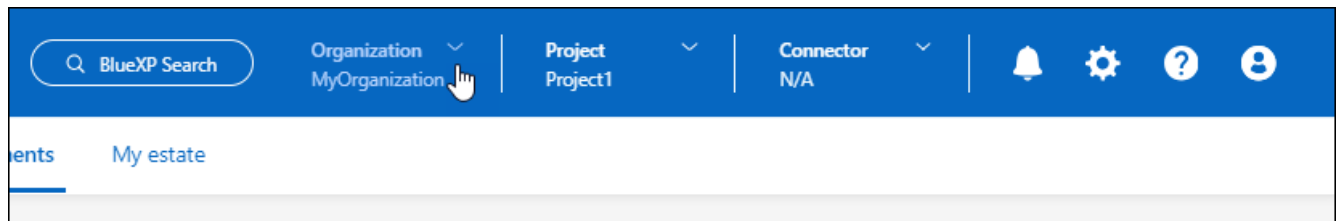
2. Select another organization and then select **Switch**.

Result

BlueXP switches to the selected organization and displays the resources associated with that organization.

Switch between projects

If your organization includes multiple projects and you have access to those projects, you can switch between them at any time.

Before you begin

You must be on any page in the BlueXP console other than the BlueXP identity and access management (IAM) pages. You can't switch to another project when viewing any of the IAM pages.

Steps

1. At the top of BlueXP, select **Project**.
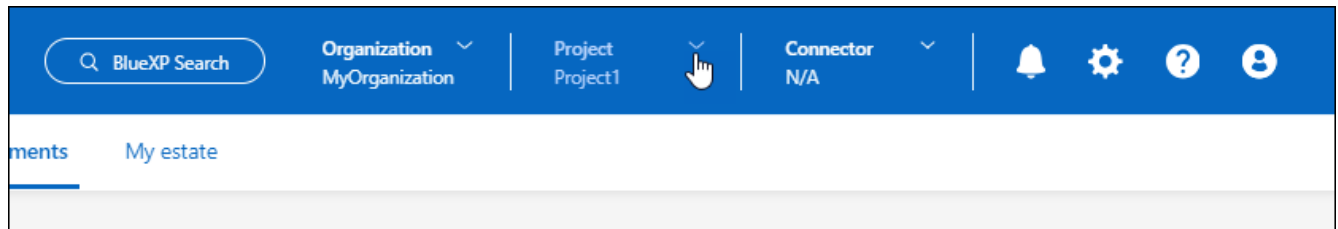
2. Browse through the folders and projects in your organization, select the project that you want, and then select **Switch**.
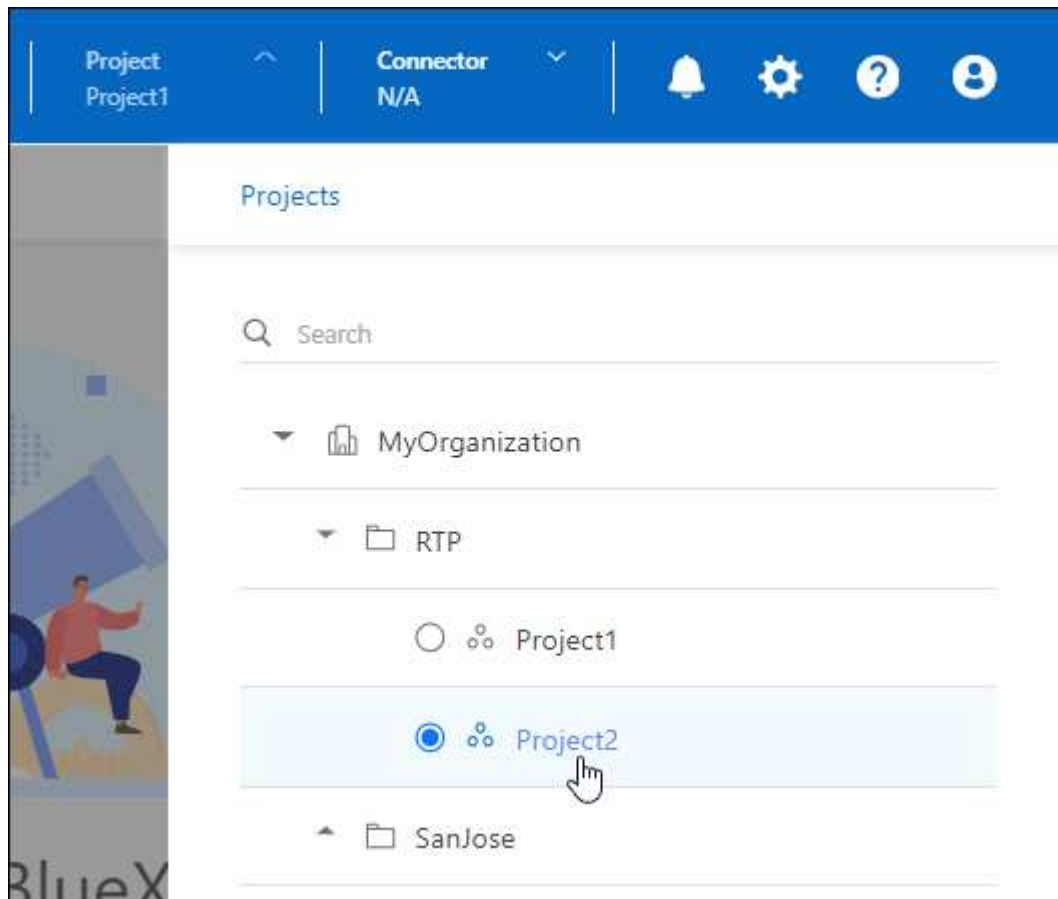
Result

BlueXP switches to the selected project and displays the resources associated with that project.

Switch between Connectors

If you have multiple Connectors, you can switch between them to see the working environments that are associated with a specific Connector.

Steps

1. At the top of BlueXP, select **Connector**.

2. Select another Connector and then select **Switch**.

Result

BlueXP refreshes and shows the working environments associated with the selected Connector.

Related link

Associate Connectors with folders and projects.

Related information

- Learn about BlueXP identity and access management
- Get started with BlueXP IAM
- Learn about the API for BlueXP IAM

Rename your BlueXP organization

If needed, you can change the name of your BlueXP organization from BlueXP identity and access management (IAM). The organization name appears at the top of the BlueXP web-based console and within the IAM pages.

Steps

1. In the upper right of the BlueXP console, select ⚙ > **Identity & Access Management**.

2. From the **Organization** page, navigate to the first row in the table, select ••• and then select **Edit organization**.

3. Enter a new organization name and select **Apply**.

Result

BlueXP updates the name of your organization. You should immediately see the updated name at the top of the BlueXP console.

Related information

- Learn about BlueXP identity and access management
- Get started with BlueXP IAM
- Learn about the API for BlueXP IAM

Monitor or audit IAM activity from the BlueXP timeline

If you need to monitor or audit an action that was completed from BlueXP identity and

access management (IAM), you can view details from the BlueXP Timeline. For example, you might want to verify who added a member to an organization or that a project was deleted successfully.

Steps

1. In the upper right of the BlueXP console, select ⚙️ > **Timeline**.

2. From the filters, select **Service** and then select **Tenancy**.

3. Use any of the other filters to change which actions display in the table.

   For example, you can use the **User** filter to show actions related to a specific user account.

Result

The Timeline updates to show you completed management actions related to BlueXP IAM.

Predefined BlueXP IAM roles and permissions

BlueXP identity and access management (IAM) includes several predefined roles that you can assign to the members of your organization across different levels of your resource hierarchy. Before you assign these roles, you should understand the permissions that each role includes.

Platform roles

BlueXP IAM includes two platform roles: Organization admin and Folder or Project admin. The main difference between the two BlueXP IAM platform roles is scope. The Organization admin role has permissions in all folders and projects; while the Folder or project admin only has permissions in the folder or project to which they have been assigned.

The Folder or Project admin role cannot create connectors.

Permissions

Task	Organization admin	Folder or Project admin
Create connectors	Yes	No
Create, modify or delete working environments (add or discover new resources using the BlueXP canvas)	Yes	Yes
Create projects/folders, including renaming, deleting, and editing	Yes	Yes
Assign roles and add users	Yes	Yes
Associate resources and connectors with folders and projects	Yes	Yes
Manage credentials from Settings > Credentials	Yes	Yes
View the BlueXP timeline	Yes	Yes

Task	Organization admin	Folder or Project admin
Use BlueXP services	Yes	Yes
Register BlueXP for support and submit cases	Yes	Yes

Example for organization roles in BlueXP for a large multi-national organization

XYZ Corporation, a multinational company, aims to segregate access to data storage resources based on geographic regions: North America, Europe, and Asia-Pacific. They want each region to have exclusive control over their resources while maintaining centralized oversight.

To achieve this, a person assigned the Organization admin role in XYZ Corporation's BlueXP creates an initial working environment and then creates separate folders in BlueXP for each region. Each region's folder contains projects (with associated resources) related to that region. The Organization Admin assigns a BlueXP user in each respective region the Folder/project admin role.

Once the initial setup is complete, regional admins with the Folder or Project admin role can create new working environments and add users within their regions. These regional admins could also add/remove/rename folders and projects to which they are assigned. The Organization admin inherits permissions for any new working environments or resources, maintaining visibility of storage usage across the entire organization.

Data services roles

Data services roles can complete their tasks in any project or folder.

SnapCenter admin

Description

Provides the ability to back up snapshots from on-premises ONTAP clusters using BlueXP backup and recovery for applications.

Permissions

A member who has this role can complete the following actions in BlueXP:

- Complete any action from Backup and recovery > Applications
- Manage all working environments in the projects and folders for which they have permissions
- Use all BlueXP services

Classification viewer

Description

Provides the ability view BlueXP classification scan results.

Permissions

View compliance information and generate reports for resources that they have permission to access. These users can't enable or disable scanning of volumes, buckets, or database schemas.

No other actions are available to a member who has this role.

Related links

- Learn about BlueXP identity and access management
- Get started with BlueXP IAM
- Manage BlueXP members and their permissions
- Learn about the API for BlueXP IAM