Manage organization partnerships

NetApp Console setup and administration

NetApp
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Creating partnerships between organizations in the NetApp Console lets partners securely manage NetApp resources across organizational boundaries, streamlining collaboration and enhancing security.

Required roles

Partnership admin Learn more about access roles.

Partnerships allow secure management of NetApp resources across organizations using role-driven relationships in the Console. The initiating organization grants access to its resources, while the accepting organization provides the users or service accounts to be granted access. Partnerships are established through a self-service workflow, giving the initiating organization full control over which resources are shared, what roles are assigned, and the ability to onboard, manage, or revoke partner access as needed.

Customers can authorize MSPs or resellers to manage NetApp environments without requiring complicated setups. Customers can control which clusters partners can access and what roles they have, and can revoke access at any time to maintain security and compliance.

As a partner, you gain centralized visibility and control across customer environments. You can easily switch to a customer's organization to manage resources, run data services, and monitor health within defined boundaries, reducing custom tooling and ensuring alignment with each customer's policies.

1

Assign one or more users the Partnership admin role

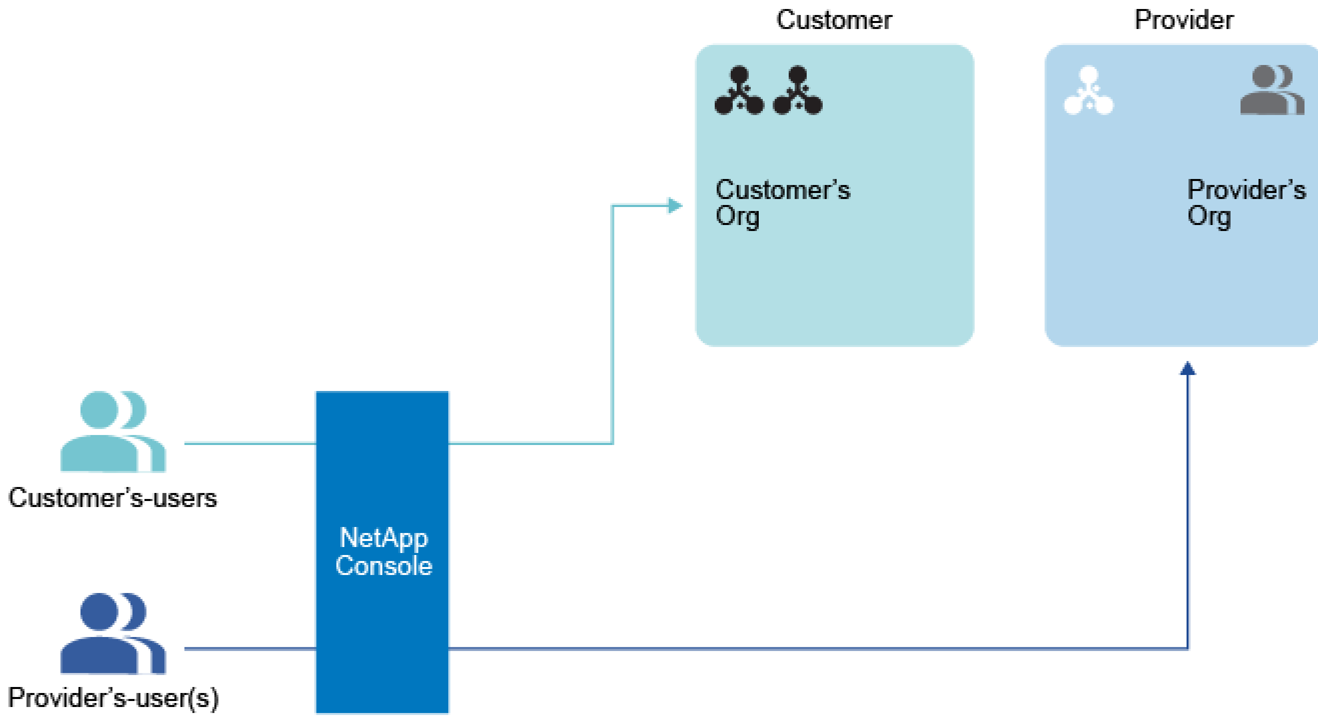
Assign one or more users in both the initiating and receiving organizations the Partnership admin role to create and manage partnerships. you can assign the Partnership viewer role to users who only need to view partnerships, and not manage.

2

Share your organization ID with the initiating organization

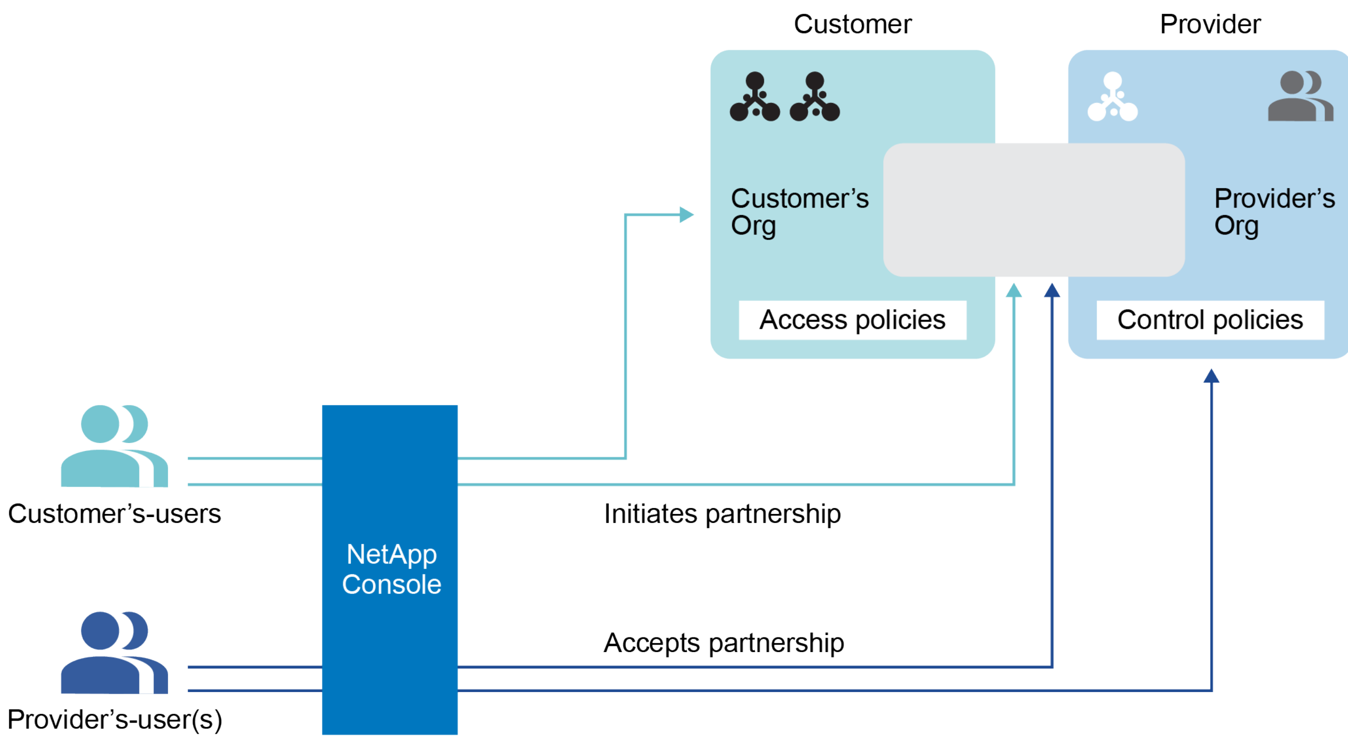
To initiate a partnership, the initiator must know the organization ID of the target organization. Only the respective organization can access this organization ID. Share it directly with the initiating organization outside the NetApp Console via email or another method.

The initiating organization is the organization granting access to its resources.



3 Initiate the partnership within NetApp Console

The organization initiating the partnership does so from within the NetApp Console by sending a partnership request.



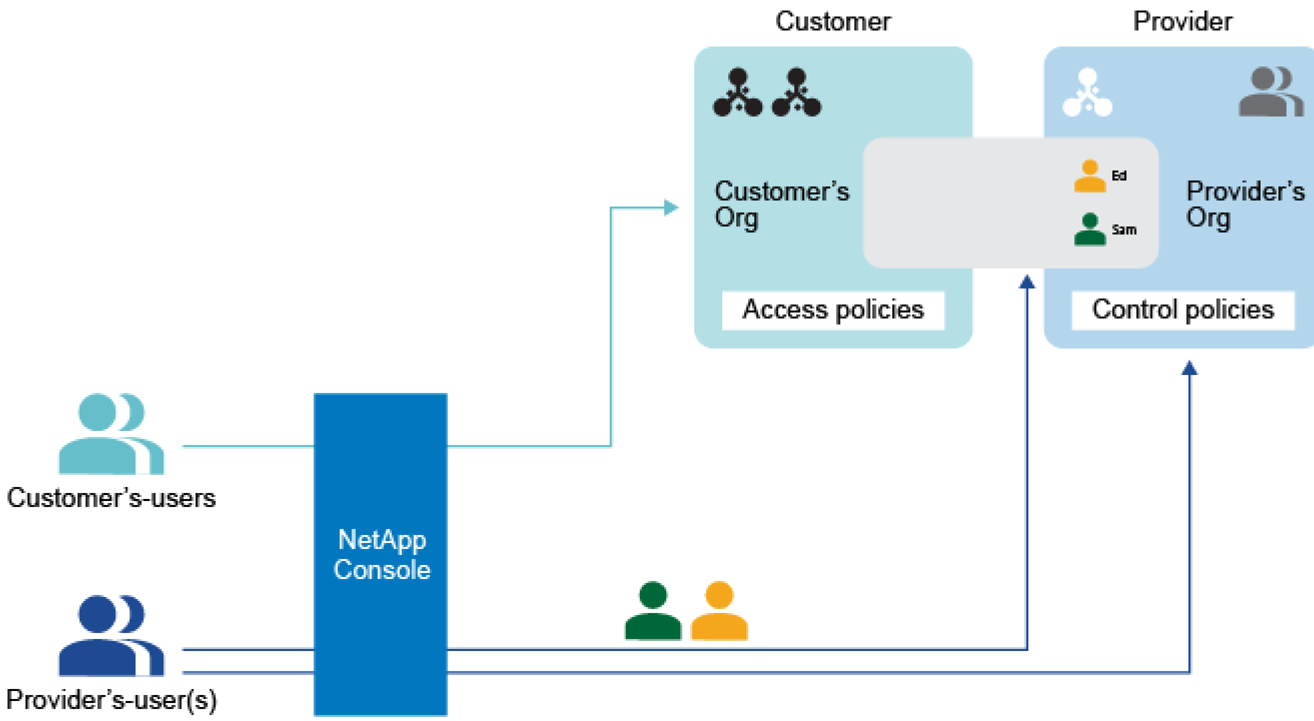
4 Approve the partnership

The receiving organization must accept the request.

The receiving organization is the organization being granted access to resources.

5 Assign users to the partnership

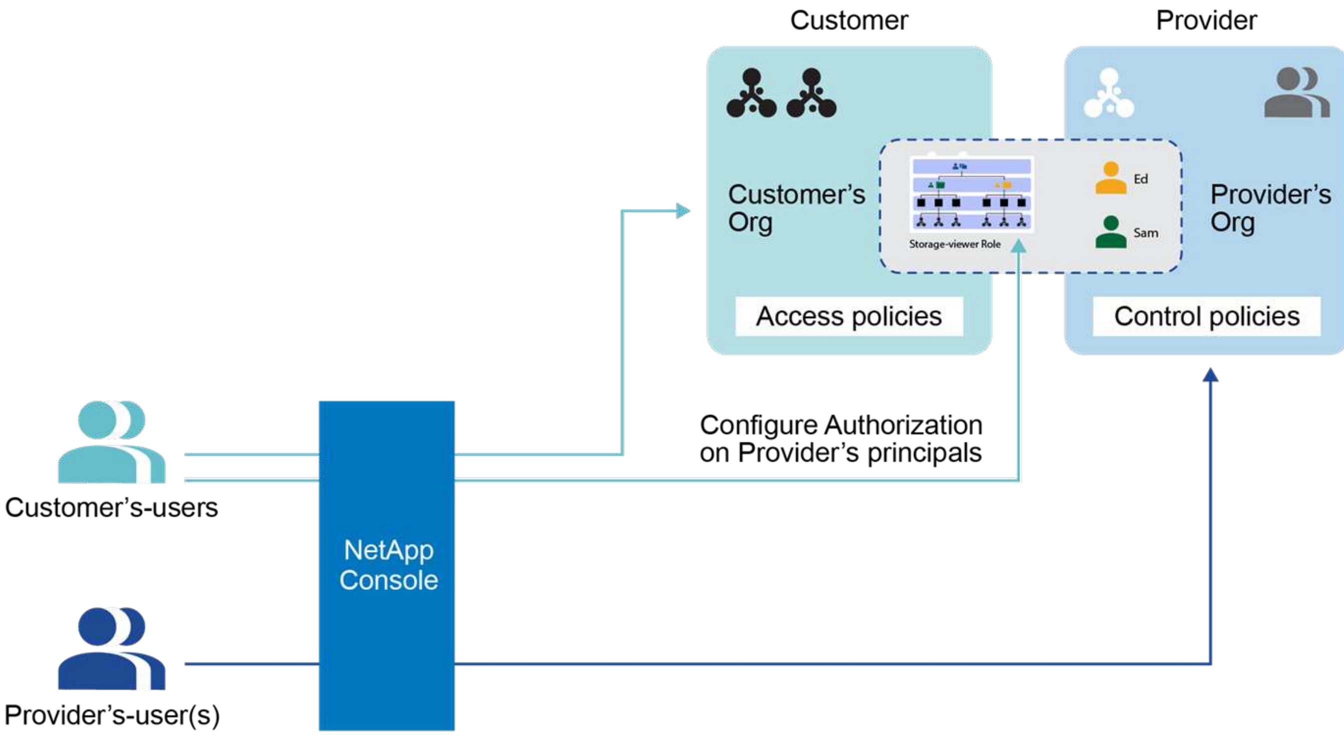
The receiving organization assigns specific users or service accounts from your organization to the partnership. The initiating organization assigns roles to these users.



6 Grant assigned users access to resources

If you are the initiating organization, you can grant access to specific resources to the users that were assigned to the partnership. You can revoke access at any time.

You do this by assigning roles for particular projects or folders within your organization.



Manage partnerships in NetApp Console

Create partnerships to establish secure, managed connections between your organization and trusted partners for collaborative NetApp resource management.

Partnerships let you securely manage NetApp resources across boundaries with role-driven relationships in the Console. The initiating organization grants access to its resources, while the accepting organization provides the users or service accounts to be granted access. Partnerships are established through a self-service workflow, giving the initiating organization full control over which resources are shared, what roles are assigned, and the ability to onboard, manage, or revoke partner access as needed.

Required roles

The **Partnership admin** role is required to make create and manage partnerships. The **Partnership viewer** can view the Partnerships page. Learn more about access roles.

Initiate an organization partnership

You can request a partnership with another organization if you know their organization ID. The receiving organization approves the request before the partnership can proceed.

Before you begin, ensure you have the organization ID of the partner organization and that you have been assigned the **Partnership admin** role.

Steps

1. Select **Administration > Identity and access**.
2. Select the **Partnerships** tab.
3. Select **Add partnership**.

4. In the **Create partnership** dialog box, enter the partner organization ID of the requested partner and select **Add**.

   The partnership request is sent to the partner organization for approval. You can view the status of the partnership request on the **Partnerships** page.

Approve an organization partnership

An organization partnership request must be accepted by the receiving organization before the partnership can proceed. You must have the **Partnership admin** role to approve and manage partnerships.

Steps

1. Select **Administration > Identity and access**.
2. Select **Partnerships**.
3. Select the **Partnership received** tab.
4. Navigate to the received partnership you want to approve and select ••• and then select **Approve**.
5. Review the details of the partnership, including the name and organization ID of the organization that requested the partnership and select **Next.**
6. Optional, add organization members to the partnership and select **Apply**.

   You can add additional members through the **Partnership** page at any time.

   > Any members you add become visible in the partner's organization where the partner can assign them to resources.

Result

The partnership you approved now shows a status of **Established**. Users with the **Partnership admim** or **Partnership viewer** roles in either organization can view the partnership.

View partnership status

View the status of your partnerships.

Required role

Partnership admin, Partnership viewer. Learn more about access roles.

Steps

1. Select **Administration > Identity and access**.
2. Select the **Partnerships**.
3. Select either the **Initiated partnerships** the **Received partnerships** tab.
4. Review the respective table that displays partnerships and their statuses.

Disable an organization partnership

You must be a member of the initiating organization to disable a partnership. Disabling a partnership immediately revokes access to any resources in your organization that were shared with the partner organization.

Required role

Partnership admin. Learn more about access roles.

Steps

1. Select **Administration > Identity and access**.
2. Select the **Partnerships**.
3. Select either the **Initiated partnerships** tab.
4. Review the respective table that displays partnerships and their statuses.
5. Navigate to the initiated partnership you want to disable and select ••• and then select **Disable**.

Manage members for a partnership organization

You can add users to a partnership by adding them to the partner organization. After you add users, the partner organization is responsible for assigning them roles for particular resources in their organization.

Required roles

The **Partnership admin** role is required to make create and manage partnerships. The **Partnership viewer** can view the Partnerships page. Learn more about access roles.

You can remove users from a partnership at any time. Removing a user from a partnership immediately revokes their access to any resources in partner organization.

Add members to a partnership

When you add members to a partnership, the **Partnership admin** of the partner organization must assign them roles for particular resources in their organization before they can access those resources.

After you add members to a partnership, the members display as members in the partner organization where the partner can assign them to resources.

Steps

1. Select **Administration > Identity and access**.
2. Select **Partnerships**.
3. Select the **Partnership received** tab.
4. Select the actions menu ••• next to the established partnership that you want to members and select **Add members**.
5. Choose one or more members to add to to the partnership and select **Add**.

Remove members from a partnership

You can remove members from a partnership at any time. Removing a user from a partnership immediately revokes their access to any resources in partner organization.

If you want to adjust the role that a member has or the resources they can access, the Partnership admin of the partner organization must make those changes.

Steps

1. Select **Administration > Identity and access**.
2. Select **Partnerships**.
3. Select the **Partnership received** tab.
4. Select the actions menu ••• next to member that you want to remove and select **Remove association**.
5. Confirm the action by selecting **Remove** in the dialog box.

View role information for a user

You can view the role that has been assigned to a user and the associated resources.

You cannot change the role associated with a user. If you have questions about the resources or the role provided, contact the administrator of the partner organization.

Steps

1. Select **Administration > Identity and access**.
2. Select **Partnerships**.
3. Select the **Partnership received** tab.
4. From the **Members** page, navigate to a member in the table, select ••• and then select **View details**.
5. In the table, expand the respective row for organization, folder, or project where you want to view the member's assigned role and select the number in the **Role** column.

Provide resource access to partnership users

You can grant access to partnership users by assigning them specific roles for folders and projects within your organization.

Required roles

Partnership admin. Learn more about access roles.

A partner organization must first add members to the partnership before you can assign them roles for resources in your organization. Learn how to add members to a partnership.

Understand roles for partnership users

You can manage roles for members of partner organizations in the same way that you do for your own. However, not all roles are available to partnership users. In particular, you can't grant partner users a role that allows software updates. Updating ONTAP software generally requires direct network access.

You can assign following roles to partner users:

- Organization admin
- Folder or project admin
- Federation admin
- Federation viewer
- Backup and recovery admin
- Backup viewer

- Restore admin
- Clone admin
- Disaster recovery admin
- Disaster recovery failover admin
- Disaster recovery application admin
- Disaster recovery viewer
- Operations support analyst
- Classification viewer

Learn more about predefined roles

Add a role to a partner user

You provide access to your organization’s resources by adding a role to a member. When you assign a role, you specify one resource and one role. You can assign more than one role to a user.

For example, if you had two projects and wanted the same user to have the role of Backup and recovery admin for both, you would need to provide the role to the user for each project. Similarly if you wanted to provide a user with two different roles for the same project, you would need to assign each role separately.

Steps

1. Select **Administration > Identity and access**.
2. Select **Partnerships**.
3. Select the **Partnership initiated** tab.
4. Select the actions menu ••• next to the established partnership that you want view and select **View details**.

   The **Member** list displays the members that the partner organization has added to the partnership.

5. Select the actions menu ••• next to the member that you want to assign a role and select **Add a role**.
6. 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 category**: Choose a role category. Learn about access roles.
   - 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.
   - **Add role**: If you want to provide access to additional folders or projects within your organization, select **Add role**, specify another folder or project or role category, and then select a role category and a corresponding role.
7. Select **Add new roles**.

Change or remove a role from a partner user

You can change or remove a role that you have assigned to a member of a partner organization.

Steps

1. Select **Administration > Identity and access**.
2. Select **Partnerships**.
3. Select the **Partnership initiated** tab.
4. Select the actions menu ••• next to the established partnership that you want view and select **View details**.

   The **Member** list displays the members that the partner organization has added to the partnership.

5. From the **Members** page, navigate to a member in the table, select ••• and then select **View details**.
6. In the table, expand the respective row for organization, folder, or project where you want to change the member's assigned role and select **View** in the **Role** column to view the roles assigned to this member.
7. You can change an existing role for a member or remove a role.
   a. To change a member's role, select **Change** next to the role you want to change. You can only change a role to a role within the same role category. For example, you can change from one data service role to another. Confirm the change.
   b. To unassign a member's role, select next to the role to remove the respective role from the member.. You'll be asked to confirm the removal.

Work in a partner organization

Once you have been given a role in a partner organization, you can switch to that organization and perform actions that you have permission to perform.

Use the Organization menu to switch between your organizations and any partner organizations you have access to. Learn more about switching organizations and projects.

You'll be able to see the resources that have been shared with you in the partner organization and perform actions based on the role that has been assigned to you. Work with your partnership admin to ensure you have the appropriate role for the resources you need to access.