



## **BlueXP accounts**

### Setup and administration

NetApp  
July 31, 2023

# Table of Contents

- BlueXP accounts ..... 1
  - Manage your BlueXP account ..... 1
  - Monitor operations in your account ..... 9
  - Create another BlueXP account..... 14
- Roles ..... 15

# BlueXP accounts

## Manage your BlueXP account

When you create a BlueXP account, it only includes a single admin user and a workspace. You can manage the account to fit your organization's needs by adding users, creating service accounts for automation purposes, by adding workspaces, and more.

[Learn how BlueXP accounts work.](#)

## Manage your account with the Tenancy API

If you want to manage your account settings by sending API requests, then you'll need to use the *Tenancy* API. This API is different than the BlueXP API, which you use to create and manage Cloud Volumes ONTAP working environments.

[View endpoints for the Tenancy API](#)

## Create and manage users

The user's in your account can access and manage the resources in specific workspaces.

### Add users

Associate users with your BlueXP account so those users can create and manage working environments in BlueXP.

### Steps

1. If the user hasn't already done so, ask the user to go to [NetApp BlueXP website](#) and sign up.
2. From the top of BlueXP, select the **Account** drop-down.



3. select **Manage Account** next to the currently selected account.



4. From the Members tab, select **Associate User**.
5. Enter the user's email address and select a role for the user:
  - **Account Admin**: Can perform any action in BlueXP.
  - **Workspace Admin**: Can create and manage resources in assigned workspaces.
  - **Compliance Viewer**: Can only view compliance information for BlueXP classification and generate reports for workspaces that they have permission to access.
6. If you selected Workspace Admin or Compliance Viewer, select one or more workspaces to associate with that user.



The image shows a dialog box titled "Associate User" with a user icon at the top. Below the title is a light blue banner with instructions: "To add a user to your NetApp Cloud Account, that user must already have signed up at [NetApp Cloud Central](#). Enter the email address that they used when signing up with Cloud Central." The form contains three fields: "User's Email" with the text "test@netapp.com", "Role" with a dropdown menu showing "Workspace Admin", and "Associate User to Workspaces" with a dropdown menu showing "Workspace-1" and a close button (X). At the bottom are two buttons: "Cancel" and "Associate User".



### Associate User

To add a user to your NetApp Cloud Account, that user must already have signed up at [NetApp Cloud Central](#). Enter the email address that they used when signing up with Cloud Central.

User's Email

test@netapp.com

Role

Workspace Admin

Associate User to Workspaces

Workspace-1 X

Cancel Associate User

7. Select **Associate**.

#### Result

The user should receive an email from NetApp BlueXP titled "Account Association." The email includes the information needed to access BlueXP.

#### Remove users

Disassociating a user makes it so they can no longer access the resources in a BlueXP account.

#### Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.



2. From the Members tab, select the action menu in the row that corresponds to the user.



3. Select **Disassociate User** and select **Disassociate** to confirm.

## Result

The user can no longer access the resources in this BlueXP account.

## Manage a Workspace Admin's workspaces

You can associate and disassociate Workspace Admins with workspaces at any time. Associating the user enables them to create and view the working environments in that workspace.



You also need to associate the Connector with workspaces so Workspace Admins can access those workspaces from BlueXP. [Learn how to manage a Connector's workspaces.](#)

## Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.



2. From the Members tab, select the action menu in the row that corresponds to the user.



3. Select **Manage Workspaces**.
4. Select the workspaces to associate with the user and select **Apply**.

## Result

The user can now access those workspaces from BlueXP, as long as the Connector was also associated with the workspaces.

## Create and manage service accounts

A service account acts as a "user" that can make authorized API calls to BlueXP for automation purposes. This makes it easier to manage automation because you don't need to build automation scripts based on a real person's user account who can leave the company at any time. And if you're using federation, you can create a token without generating a refresh token from the cloud.

You give permissions to a service account by assigning it a role, just like any other BlueXP user. You can also associate the service account with specific workspaces in order to control the working environments (resources) that the service can access.

When you create the service account, BlueXP enables you to copy or download a client ID and client secret for the service account. This key pair is used for authentication with BlueXP.

### Create a service account

Create as many service accounts as you need to manage the resources in your working environments.

### Steps

1. From the top of BlueXP, select the **Account** drop-down.



2. Select **Manage Account** next to the currently selected account.



3. From the Members tab, select **Create Service Account**.
4. Enter a name and select a role. If you chose a role other than Account Admin, choose the workspace to associate with this service account.
5. Select **Create**.
6. Copy or download 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.

7. Select **Close**.

### Obtain a bearer token for a service account

In order to make API calls to the [Tenancy API](#), you'll need to obtain a bearer token for a service account.

[Learn how to create a service account token](#)

### Copy the client ID

You can copy a service account's client ID at any time.

### Steps

1. From the Members tab, select the action menu in the row that corresponds to the service account.





2. Select **Client ID**.
3. The ID is copied to your clipboard.

## Recreate keys

Recreating the key will delete the existing key for this service account and then create a new key. You won't be able to use the previous key.

### Steps

1. From the Members tab, select the action menu in the row that corresponds to the service account.



2. Select **Recreate Key**.
3. Select **Recreate** to confirm.
4. Copy or download 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.

5. Select **Close**.

## Delete a service account

Delete a service account if you no longer need to use it.

### Steps

1. From the Members tab, select the action menu in the row that corresponds to the service account.



2. Select **Delete**.
3. Select **Delete** again to confirm.

## Manage workspaces

Manage your workspaces by creating, renaming, and deleting them. Note that you can't delete a workspace if it contains any resources. It must be empty.

### Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.
2. Select **Workspaces**.
3. Choose one of the following options:
  - Select **Add New Workspace** to create a new workspace.
  - Select **Rename** to rename the workspace.
  - Select **Delete** to delete the workspace.

If you created a new workspace, you must also add the Connector to that workspace. If you don't add the Connector, then Workspace Admins can't access any of the resources in the workspace. Refer to the following section for more details.

## Manage a Connector's workspaces

You need to associate the Connector with workspaces so Workspace Admins can access those workspaces from BlueXP.

If you only have Account Admins, then associating the Connector with workspaces isn't required. Account Admins have the ability to access all workspaces in BlueXP by default.

[Learn more about users, workspaces, and Connectors.](#)

### Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.
2. Select **Connector**.
3. Select **Manage Workspaces** for the Connector that you want to associate.
4. Select the workspaces to associate with the Connector and select **Apply**.

## Change your account name

Change your account name at any time to change it to something meaningful for you.

### Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.
2. In the **Overview** tab, select the edit icon next to the account name.
3. Type a new account name and select **Save**.

## Allow private previews

Allow private previews in your account to get access to new services that are made available as a preview in BlueXP.

Services in private preview are not guaranteed to behave as expected and might sustain outages and be missing functionality.

### Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.
2. In the **Overview** tab, enable the **Allow Private Preview** setting.

## Allow third-party services

Allow third-party services in your account to get access to third-party services that are available in BlueXP. Third-party services are cloud services similar to the services that NetApp offers, but they're managed and supported by third-party companies.

### Steps

1. From the top of BlueXP, select the **Account** drop-down and select **Manage Account**.
2. In the **Overview** tab, enable the **Allow Third Party Services** setting.

## Monitor operations in your account

You can monitor the status of the operations that BlueXP is performing to see if there are any issues that you need to address. You can view the status in the Notification Center, in the Timeline, or have notifications sent to your email.

The following table provides a comparison of the Notification Center and the Timeline so you can understand what each has to offer.

Notification Center	Timeline
Shows high level status for events and actions	Provides details for each event or action for further investigation
Shows status for the current login session (the information won't appear in the Notification Center after you log off)	Retains status for the last month
Shows only actions initiated in the user interface	Shows all actions from the UI or APIs

Notification Center	Timeline
Shows user-initiated actions	Shows all actions, whether user-initiated or system-initiated
Filter results by importance	Filter by service, action, user, status, and more
Provides the ability to email notifications to Account users and to others	No email capability

## Monitor activities using the Notification Center

Notifications track the progress of operations that you've initiated in BlueXP so you can verify whether the operation was successful or not. They enable you to view the status for many BlueXP actions that you initiated during your current login session. Not all BlueXP services report information into the Notification Center at this time.

You can display the notifications by selecting the notification bell  in the menu bar. The color of the little bubble in the bell indicates the highest level severity notification that is active. So if you see a red bubble, it means there's an important notification that you should look at.



You can also configure BlueXP to send certain types of notifications by email so you can be informed of important system activity even when you're not logged into the system. Emails can be sent to any users who are part of your BlueXP account, or to any other recipients who need to be aware of certain types of system activity. See how to [set email notification settings](#).

## Notification types

Notifications are classified in the following categories:

Notification type	Description
Critical	A problem occurred that might lead to service disruption if corrective action is not taken immediately.
Error	An action or process ended with failure, or could lead to failure if corrective action is not taken.
Warning	An issue that you should be aware of to make sure it does not reach the critical severity. Notifications of this severity do not cause service disruption, and immediate corrective action might not be required.
Recommendation	A system recommendation for you to take an action to improve the system or a certain service; for example: costs saving, suggestion for new services, recommended security configuration, etc.
Information	A message that provides additional information about an action or process.
Success	An action or process completed successfully.

## Filter notifications

By default you'll see all active notifications in the Notification Center. You can filter the notifications that you see to show only those notifications that are important to you. You can filter by BlueXP "Service" and by notification "Type".

The image shows a user interface for filtering notifications. It consists of two side-by-side panels. The left panel is titled 'Filter Services (All)' and contains three items: 'Digital Wallet (3)' with a checked checkbox, 'Active IQ (2)' with a checked checkbox, and 'AppTemplate (1)' with an unchecked checkbox. Below these items are two buttons: 'Clear' and 'Apply'. The right panel is titled 'Filter Type (All)' and contains six items: 'Information (0)' with an unchecked checkbox, 'Success (1)' with an unchecked checkbox, 'Warning (2)' with a checked checkbox, 'Error (1)' with a checked checkbox, 'Critical (0)' with a checked checkbox, and 'Recommendation (0)' with an unchecked checkbox. Below these items are two buttons: 'Clear' and 'Apply'.

For example, if you want to see only "Error" and "Warning" notifications for BlueXP operations, select those entries and you'll see only those types of notifications.

## Dismiss notifications

You can remove notifications from the page if you no longer need to see them. You can dismiss all notifications at once, or you can dismiss individual notifications.

To dismiss all notifications, in the Notification Center, select  and select **Dismiss All**.



To dismiss individual notifications, hover your cursor over the notification and select **Dismiss**.



### Set email notification settings

You can send specific types of notifications by email so you can be informed of important system activity even when you're not logged into BlueXP. Emails can be sent to any users who are part of your BlueXP account, or to any other recipients who need to be aware of certain types of system activity.



- At this time, notifications are sent by email for the following BlueXP features and services: Connector, BlueXP copy and sync, BlueXP backup and recovery, BlueXP digital wallet, and BlueXP ransomware protection. Additional services will be added in future releases.
- Sending email notifications is not supported when the Connector is installed in a site without internet access.

The filters you set in the Notification Center do not determine the types of notifications you'll receive by email. By default, BlueXP Account Admins will receive emails for all "Critical" and "Recommendation" notifications. These notifications are across all services - you can't choose to receive notifications for only certain services, for example Connectors or BlueXP backup and recovery.

All other users and recipients are configured not to receive any notification emails - so you'll need to configure notification settings for any additional users.

You must be an Account Admin to customize the notifications settings.

### Steps

1. From the BlueXP menu bar, select **Settings > Alerts and Notifications Settings**.



2. Select a user, or multiple users, from either the *Account Users* tab or the *Additional Recipients* tab, and choose the type of notifications to be sent:
  - To make changes for a single user, select the menu in the Notifications column for that user, check the types of Notifications to be sent, and select **Apply**.
  - To make changes for multiple users, check the box for each user, select **Manage Email Notifications**, check the types of Notifications to be sent, and select **Apply**.



### Add additional email recipients

The users who appear in the *Account Users* tab are populated automatically from the users in your BlueXP account (from the [Manage Account](#) page). You can add email addresses in the *Additional Recipients* tab for other people, or groups, who do not have access to BlueXP, but who need to be notified about certain types of

alerts and notifications.

### Steps

1. From the Alerts and Notifications Settings page, select **Add New Recipients**.



**Add New Recipient**

Email  
saul.jenkin@gmail.com

Name  
Saul Jenkin

Notification Type  
Critical × Recommendation × Error ×

Add New Recipient Cancel

2. Enter the name, email address, and select the types of Notifications that recipient will receive, and select **Add New Recipient**.

## Audit user activity in your account

The Timeline in BlueXP shows the actions that users completed to manage your account. This includes management actions such as associating users, creating workspaces, creating Connectors, and more.

Checking the Timeline can be helpful if you need to identify who performed a specific action, or if you need to identify the status of an action.

### Steps

1. From the BlueXP menu bar, select **Settings > Timeline**.
2. Under the Filters, select **Service**, enable **Tenancy**, and select **Apply**.

### Result

The Timeline updates to show you account management actions.

## Create another BlueXP account

When you sign up to BlueXP, you're prompted to create an account for your organization. This account might be all that you need, but if your business requires multiple accounts, then you'll need to create additional accounts by using the Tenancy API.

Use the following API call to create an additional BlueXP account:

```
POST /tenancy/account/{accountName}
```



If you want to enable restricted mode, you need to include the following in the request body:

```
{
  "isSaasDisabled": true
}
```



You can't change the restricted mode setting after BlueXP creates the account. You can't enable restricted mode later and you can't disable it later. It must be set at time of account creation.

[Learn how to use this API call](#)

#### Related links

- [Learn about BlueXP accounts](#)
- [Learn about BlueXP deployment modes](#)

## Roles

The Account Admin, Workspace Admin, Compliance Viewer, and SnapCenter Admin roles provide specific permissions to users. You can assign one of these roles when you associate a new user with your BlueXP account.

The Compliance Viewer role is for read-only BlueXP classification access.

Task	Account Admin	Workspace Admin	Compliance Viewer	SnapCenter Admin
Manage working environments	Yes	Yes	No	No
Enable services on working environments	Yes	Yes	No	No
View data replication status	Yes	Yes	No	No
View the timeline	Yes	Yes	No	No
Switch between workspaces	Yes	Yes	Yes	No
View BlueXP classification scan results	Yes	Yes	Yes	No
Delete working environments	Yes	No	No	No
Connect Kubernetes clusters to working environments	Yes	No	No	No
Receive the Cloud Volumes ONTAP report	Yes	No	No	No

Task	Account Admin	Workspace Admin	Compliance Viewer	SnapCenter Admin
Create Connectors	Yes	No	No	No
Manage BlueXP accounts	Yes	No	No	No
Manage credentials	Yes	No	No	No
Modify BlueXP settings	Yes	No	No	No
View and manage the Support Dashboard	Yes	No	No	No
Remove working environments from BlueXP	Yes	No	No	No
Install an HTTPS certificate	Yes	No	No	No

#### Related links

- [Setting up workspaces and users in the BlueXP account](#)
- [Managing workspaces and users in the BlueXP account](#)

## Copyright information

Copyright © 2023 NetApp, Inc. All Rights Reserved. Printed in the U.S. No part of this document covered by copyright may be reproduced in any form or by any means—graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system—without prior written permission of the copyright owner.

Software derived from copyrighted NetApp material is subject to the following license and disclaimer:

THIS SOFTWARE IS PROVIDED BY NETAPP “AS IS” AND WITHOUT ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WHICH ARE HEREBY DISCLAIMED. IN NO EVENT SHALL NETAPP BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NetApp reserves the right to change any products described herein at any time, and without notice. NetApp assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by NetApp. The use or purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of NetApp.

The product described in this manual may be protected by one or more U.S. patents, foreign patents, or pending applications.

LIMITED RIGHTS LEGEND: Use, duplication, or disclosure by the government is subject to restrictions as set forth in subparagraph (b)(3) of the Rights in Technical Data -Noncommercial Items at DFARS 252.227-7013 (FEB 2014) and FAR 52.227-19 (DEC 2007).

Data contained herein pertains to a commercial product and/or commercial service (as defined in FAR 2.101) and is proprietary to NetApp, Inc. All NetApp technical data and computer software provided under this Agreement is commercial in nature and developed solely at private expense. The U.S. Government has a non-exclusive, non-transferrable, nonsublicensable, worldwide, limited irrevocable license to use the Data only in connection with and in support of the U.S. Government contract under which the Data was delivered. Except as provided herein, the Data may not be used, disclosed, reproduced, modified, performed, or displayed without the prior written approval of NetApp, Inc. United States Government license rights for the Department of Defense are limited to those rights identified in DFARS clause 252.227-7015(b) (FEB 2014).

## Trademark information

NETAPP, the NETAPP logo, and the marks listed at <http://www.netapp.com/TM> are trademarks of NetApp, Inc. Other company and product names may be trademarks of their respective owners.