

Role Based Access Control (RBAC)

Stream**One**[®] *Ion*

Introduction

Role Based Access Control (RBAC) expands current user roles with new roles providing a more clear and granular segregation of platform duties for compliance and security reasons. When managing user accounts from the Admin Console, now there are three choices of roles, including a new Sales role. The other two pre-existing roles have been renamed from 'Owner' to 'Account Admin' and from 'User to Ops', in preparation for adding more granular roles in the future.

As part of user management, now there is a new set of new functions to manage user's password generation, password management and sharing.

Roles

Role Base Access Control (RBAC) includes 3 pre-defined roles which apply to all persona users in StreamOne® Ion. The User role will be retained in till further notice; the idea is to move all users on the User role to a more specific one depending on their day-to-day tasks. With RBAC all existing users will retain their Account Owner or User roles unless their role is updated.

Role	Description
Account Admin	Admin role with full access to all admin portal modules
User	Existing role, this will be locked so no NEW users can be added to this role
Sales	Access to modules required for sales transactions as Dashboards, Reports (no option to Generate Invoices) Partners, Customers, Support and Launch Marketplace
Ops	Access to all modules except users' management

Role-Based Permissions Per Role

Module	Component	Account Admin	User	Sales	OPS
Dashboard	N/A	Full Access	Full Access	Full Access	Full Access
Reports	Generate Invoice	Full Access	Full Access	No generate invoice	Full Access
Reports	All other report activities (view, download etc)	Full Access	Full Access	Full Access	Full Access
Products	N/A	Full Access	Full Access	No Access	Full Access
Partners (incl. Impersonation)	N/A	Full Access	Full Access	Full Access	Full Access
Customers	Customers Page	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Overview	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Products	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Customer Reports	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Customer Invoices	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: General	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Cloud Billing	Full Access	Full Access	Full Access	Full Access

Customers	Customer360: Marketplace	Full Access	Full Access	Full Access	Full Access
Billing	Customer invoices	Full Access	Full Access	No Access	Full Access
Billing	Reseller invoices	Full Access	Full Access	No Access	Full Access
Billing	My invoices	Full Access	Full Access	No Access	Full Access
Billing	Legacy Reports	Full Access	Full Access	No Access	Full Access
Billing	Import Jobs	Full Access	Full Access	No Access	Full Access
Billing	Pricebooks	Full Access	Full Access	No Access	Full Access
Support	N/A	Full Access	Full Access	Full Access	Full Access
Marketplace	V3C	Full Access	Full Access	Full Access	Full Access
Marketplace (see above ^ note)	Customer Storefront	Full Access	Full Access	Full Access	Full Access
Settings	Account Information (req'd for all roles)	Full Access	Full Access	Full Access	Full Access
Settings	Account > Users (edit, add)	Full Access	No Access	No Access	No Access
Settings	Account Settings (all others)	Full Access	Full Access	No Access	Full Access
Settings	Billing	Full Access	Full Access	No Access	Full Access
Settings	Customer Storefront	Full Access	Full Access	No Access	Full Access

Settings	Cost Management	Full Access	Full Access	No Access	Full Access
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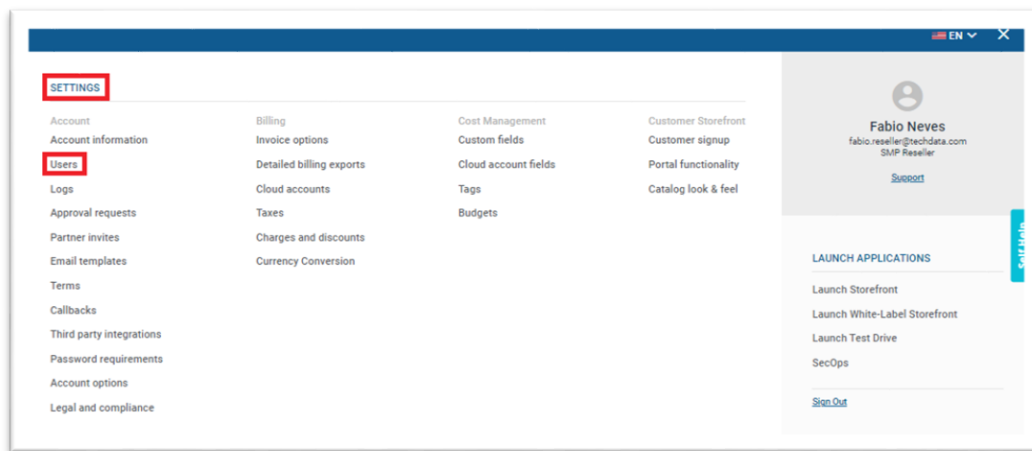
Note: Access to the Marketplace will be discontinued as part of this rollout. Going forward, you will only be able to buy on behalf of your customers and manage assets through the Customers module in the Admin Console, which received many crucial enhancements over the last year.

User Journeys

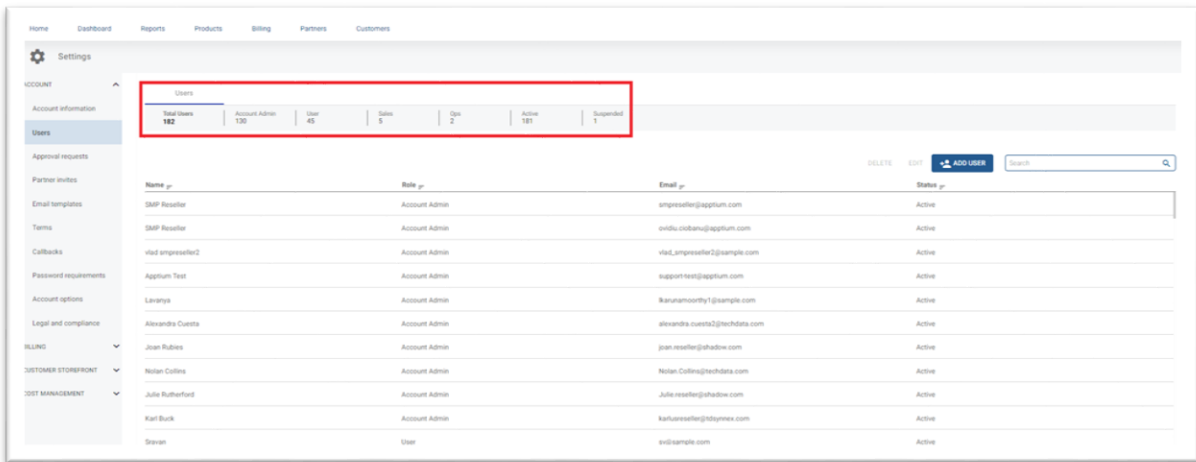
Following the segregation of duties concept, each employee in an organization has a specific role, driving the need for a specific user set up and certain type of controlled access/permissions in the platform.

User Role Management - Add New User (Reseller)

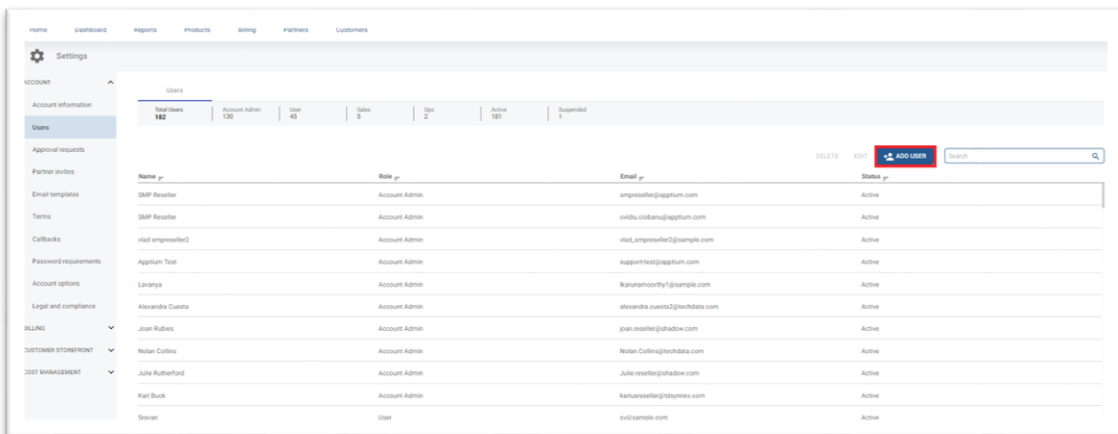
1. From the options menu ☰ from the right top corner and under “Settings” go the option “Users”.



2. Now under the “Users” option on the top of the page you will have an easy way of filtering down your search field, by different roles, active accounts and pendent actions.



3. To add a new user, click on “Add User” option. The new roles are available for both new and existing users.



4. Now under the “Add User” options under the “User Role” you can find the roles available (the new roles are available for both new and existing users). Please check this document further down to see all available roles and their access options.

<

Add User

Configure an administrative user. Admin users can access the Admin Console.

User Details

Contact Name *

User Role *

Email *

Status *

Password *

Confirm Password *

Roles description

Account Admin: Admin role with full access to all admin portal modules.


User: Existing role, this will be locked so no NEW users can be added to this role.

Sales: Access to modules required for sales transactions as Dashboards, Reports (no option to Generate Invoices) Partners, Customers, Support and Launch Marketplace.

Ops: Access to all modules except user management .

CANCEL

SAVE


- Once you finish the add user steps and click save, a summary of the user details will be displayed, with the contact's name, user role, email, status, and password. There are a couple of new options here, one is checking the password by clicking on  option.

< | **Add User**

Configure an administrative user. Admin users can access the Admin Console.

OCM was successfully Created and can access the Admin Platform.


User Details

Contact Name	OCM
User Role	Account Admin
Email	ocm@ocm.com
Status	Active
Password:	kgR#SN52_&d9 

SEND SIGN-IN INSTRUCTIONS

CREATE ANOTHER USER **DONE**

Note: By default, the password reveal button is turned off. The password reveal button appears to the right of the password field, as an eye-shaped icon. When the user clicks the password reveal button to turn it on, the password text is revealed, and the eye icon changes to have a slash over it.



6. Under the  option you will have the ability to change or reset password, the user creator can change the password for security reasons or reset it.
 - a) Automatically generate a password this option will enable the automatic generation of a strong and unique password (if you want the platform to generate one on your behalf) and press the “Reset Password” option to save the changes.

Reports Products Billing Partners Customers

< | Add User
Configure an administrative user. Admin users can access the Admin Console.

OCM was successfully Created and can access the Admin Platform.

User Details

Contact Name	OCM
User Role	Account Admin
Email	ocm@oocm.com
Status	Active
Password	••••••••  

SEND SIGN-IN INSTRUCTIONS



CREATE ANOTHER USER **Done**

Reset Password

User Details

Name: OCM
Email: ocm@oocm.com

Password Options

☒ Automatically generate a password  

☐ Create a password

Reset Password

RESET PASSWORD



- b) The create password option will allow the user to choose a preferred password for the account by entering and re-typing it and press the “Reset Password” option to save the changes.

Reports Products Billing Partners Customers

< | Add User
Configure an administrative user. Admin users can access the Admin Console.

OCM was successfully Created and can access the Admin Platform.

User Details

Contact Name	OCM
User Role	Account Admin
Email	ocm@oocm.com
Status	Active
Password	••••••••  

SEND SIGN-IN INSTRUCTIONS


CREATE ANOTHER USER **Done**


Reset Password

User Details

Name: OCM
Email: ocm@oocm.com

Password Options

☐ Automatically generate a password 

☒ Create a password 

Password
••••••••

Use at least 8 characters.
Must have at least one upper case character

Confirm Password
••••••••

Reset Password

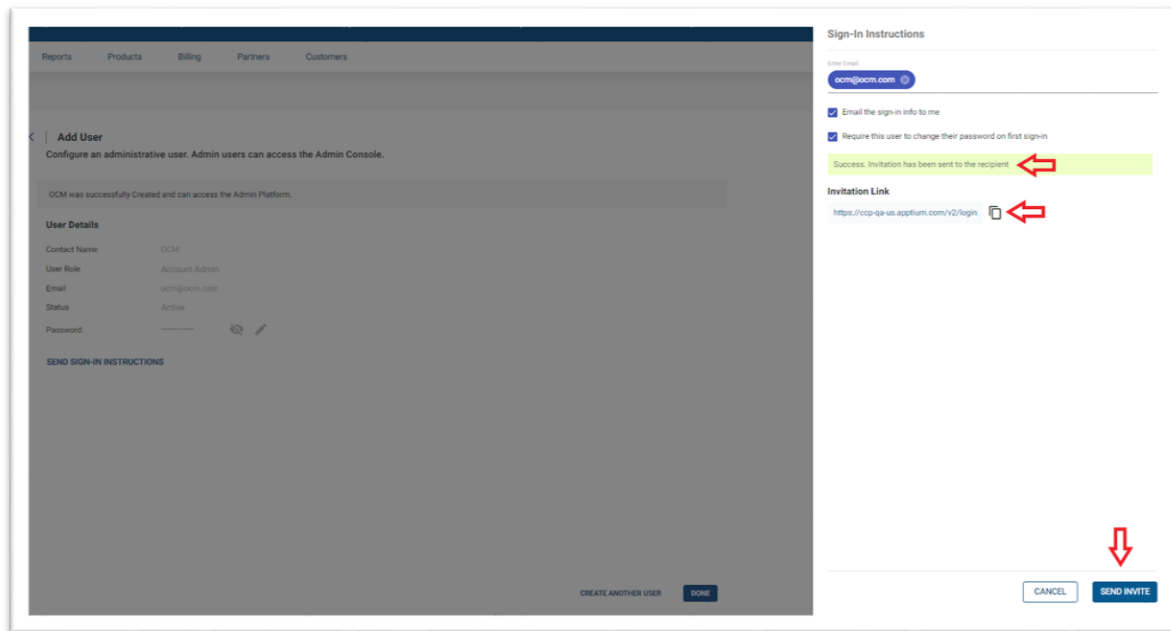
RESET PASSWORD

7. After inputting the email address of the user that the account creator wishes to grant access to the account, there are two new options for sending sign-in instructions.
 - **Enter Email** - email recipient that will receive the information.
 - **Email the sign-in info to me** - This option allows the account creator to get a copy of the email sent to the user.
 - **Require this user to change their password on first sign-in** - This option ensures that users granted access to the account must create their own unique password upon their first login, enhancing the account's security.

The screenshot shows a web application interface for adding a user. The main content area is titled 'Add User' and contains a form with two sections. The 'User Details' section has fields for 'Contact Name', 'User Role', 'Email', 'Status', and 'Password'. The 'Sign-In Instructions' section has a text input for 'Enter Email', a checkbox for 'Email the sign-in info to me', and a checkbox for 'Require this user to change their password on first sign-in'. Red arrows point to each of these three fields. At the bottom right, there are 'CANCEL' and 'SEND INVITE' buttons.

Note: The email body sent on this option can be edited under the “User sign in – Invitation” template on the Settings menu.

8. After selecting the preferred option, click on the **"SEND INVITE"** button to send the sign-in instructions to the specified users' emails. A validation message and an invitation link will be displayed to confirm that the instructions were sent successfully.





9. If after creating the new user and there is a need to create another one you can proceed just by clicking in the “CREATE ANOTHER USER” option otherwise, if you have finish creating users click on the option “DONE.”



< | **Add User**
Configure an administrative user. Admin users can access the Admin Console.

OCM was successfully Created and can access the Admin Platform.

User Details

Contact Name	OCM
User Role	Account Admin
Email	ocm@ocm.com
Status	Active
Password:	*****  



SEND SIGN-IN INSTRUCTIONS

[CREATE ANOTHER USER](#) [DONE](#)

User Role Management - Editing An Existing User (Reseller)

1. From the options menu  from the right top corner and under “Settings” go the option “Users”.

EN  

SETTINGS

Account	Billing	Cost Management	Customer Storefront
Account information	Invoice options	Custom fields	Customer signup
Users	Detailed billing exports	Cloud account fields	Portal functionality
Logs	Cloud accounts	Tags	Catalog look & feel
Approval requests	Taxes	Budgets	
Partner invites	Charges and discounts		
Email templates	Currency Conversion		
Terms			
Callbacks			
Third party integrations			
Password requirements			
Account options			
Legal and compliance			

Fabio Neves
fabio.reseller@techdata.com
SMP Reseller
[Support](#)

LAUNCH APPLICATIONS

Launch Storefront
Launch White-Label Storefront
Launch Test Drive
SecOps
[Sign Out](#)

[Self Help](#)

2. To edit a user double on the user you want to perform the action or select the user and click on “Edit” option. The new roles are available for both new and existing users.

Home

Users

Regions

Products

Billing

Partners

Customers

Settings

ACCOUNT

Account information

Users

Approval requests

Partner invites

Email templates

Terms

Callbacks

Password requirements

Account options

Legal and compliance

Users

Total rows

182

Account Admin

130

User

45

Sales

5

Ops

2

Active

181

Suspended

1

DELETE

ADD

400 USERS

Search

Name	Role	Email	Status
SMTP Reseller	Account Admin	smtpreseller@apptium.com	Active
SMTP Reseller	Account Admin	smtp@cloudbanq.com	Active
res@smtpreseller[2]	Account Admin	res@smtpreseller[2]@example.com	Active
Apptium Test	Account Admin	support-test@apptium.com	Active
Leavans	Account Admin	leavans.courtney1[2]@example.com	Active
Alexandra Cuatrecasas	Account Admin	alexandra.cuatrecasas[2]@techdata.com	Active
Joan Rubies	Account Admin	joan.reseller@ethaw.com	Active
Nolan Collins	Account Admin	Nolan.Collins@techdata.com	Active
Julie Rutherford	Account Admin	Julie.reseller@ethaw.com	Active
Karl Buck	Account Admin	karlbuckreseller@tdtmmex.com	Active
Elvira	User	elvira@cloudbanq.com	Active

3. If you want to change the role assign previously select the new Role from “User Role” option and then click “Save” option. There are no notifications available to users when a change of a role is performed.

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Add User

Configure an administrative user. Admin users can access the Admin Console.

User Details

Contact Name *

User Role *

Email *

Status *

Password *

Confirm Password *

Roles description

Account Admin: Admin role with full access to all admin portal modules.

User: Existing role, this will be locked so no NEW users can be added to this role.

Sales: Access to modules required for sales transactions as Dashboards, Reports (no option to Generate Invoices) Partners, Customers, Support and Launch Marketplace.

Ops: Access to all modules except user management.

CANCEL

SAVE

4. If you want to reset the password now you have 2 options like in the add user process.

- a) Automatically generate a password this option will enable the automatic generation of a strong and unique password (if you want the platform to generate one on your behalf) and press the “Reset Password” option to save the changes this will bring you to the manage user page like when adding a new user process, where you can see the password or send the same by email.

The screenshot shows a 'Reset Password' dialog on the right and an 'Edit User' page on the left. In the dialog, under 'Password Options', the 'Automatically generate a password' option is selected, indicated by a red arrow. In the 'Edit User' page, a 'RESET PASSWORD' button is highlighted with a red arrow at the bottom left.

Reset Password

User Details
Name: purchasingagent@demoreseller.com
Email: purchasingagent@demoreseller.com

Password Options
☒ Automatically generate a password
☐ Create a password

Cancel **RESET PASSWORD**

Edit User
Configure an administrative user. Admin users can access the Admin Console.

User Details

Contact Name *	purchasingagent@demoreseller.com	User Role *	Purchasing Agent
Email *	purchasingagent@demoreseller.com	Status *	Active

RESET PASSWORD

The screenshot shows the 'Edit User' page after a successful password reset. A message at the top states: 'purchasingagent@demoreseller.com was successfully Updated and can access the Admin Platform.' The 'User Details' section shows the user's information. The 'Password' field is masked with dots, and there are icons for showing/hiding the password and copying it, both highlighted with red arrows. A 'SEND SIGN-IN INSTRUCTIONS' button is also highlighted with a red arrow.

Edit User
Configure an administrative user. Admin users can access the Admin Console.

purchasingagent@demoreseller.com was successfully Updated and can access the Admin Platform.

User Details

Contact Name	purchasingagent@demoreseller.com
User Role	Purchasing Agent
Email	purchasingagent@demoreseller.com
Status	Active
Password	*****

SEND SIGN-IN INSTRUCTIONS

CREATE ANOTHER USER **DONE**

- b) The create password option will allow the user to choose a preferred password for the account by entering and re-typing it and press the “Reset Password” option to save the changes

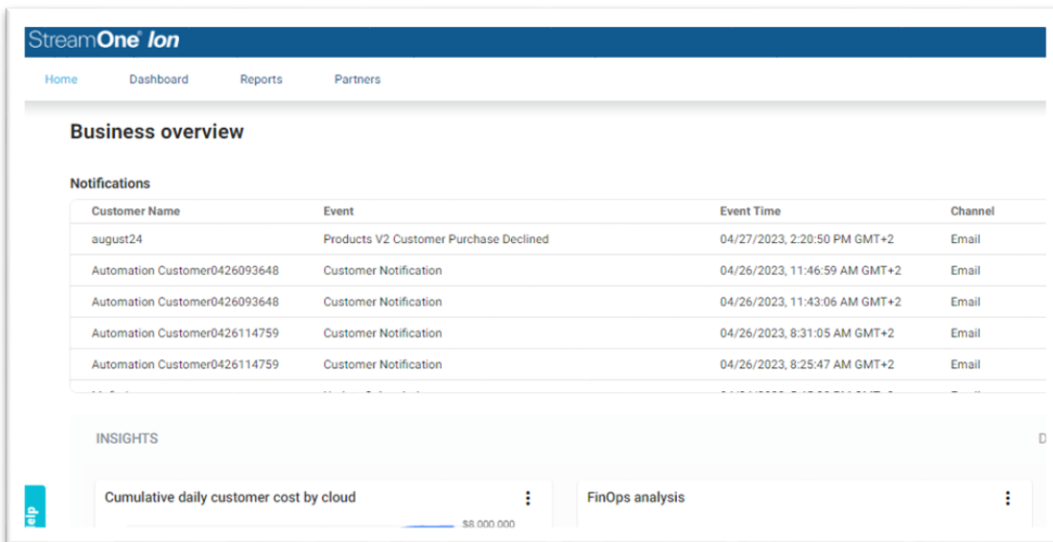
The screenshot displays a web application interface for managing users. On the left, a sidebar contains navigation links: Reports, Products, Billing, Partners, and Customers. The main content area is titled 'Edit User' and includes a sub-header 'Configure an administrative user. Admin users can access the Admin Console.' Below this, the 'User Details' section shows fields for 'Contact Name' (purchasingagent@demoreseller.com) and 'User Role' (Purchasing Agent). A 'RESET PASSWORD' link is visible at the bottom left of the main content area, indicated by a red arrow. On the right, a 'Reset Password' panel is active. It contains 'User Details' (Name: purchasingagent@demoreseller.com, Email: purchasingagent@demoreseller.com) and 'Password Options'. The 'Create a password' option is selected, indicated by a red arrow. Below this, there are input fields for 'Password' and 'Confirm Password', each with a red arrow pointing to it. At the bottom right of the 'Reset Password' panel, there are 'CANCEL' and 'RESET PASSWORD' buttons, with the latter highlighted by a red box.

Access Control

The platform module's access is based on the role assigned to a user:

- If a role does not have access to the platform module it will not display for the user when they login using their credentials. Example: Sales cannot access Product, full billing option and Customers.
- If they have partial access to items within a module, they will only see the options which are available to their role type.

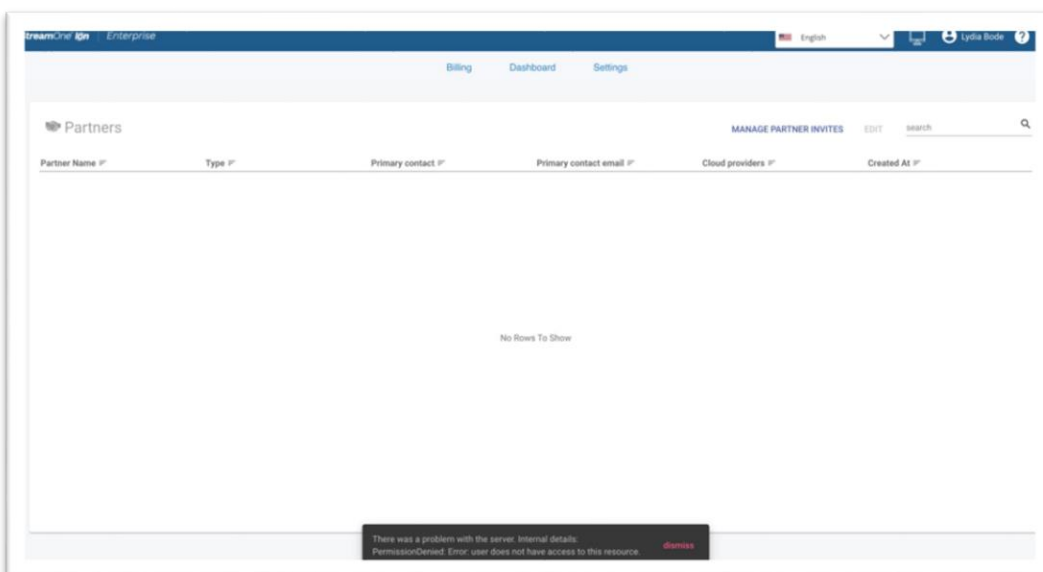
Sales View:



The screenshot shows the 'Business overview' section of the StreamOne Ion dashboard. It includes a 'Notifications' table with columns for Customer Name, Event, Event Time, and Channel. Below the table is an 'INSIGHTS' section with two cards: 'Cumulative daily customer cost by cloud' and 'FinOps analysis'.

Customer Name	Event	Event Time	Channel
august24	Products V2 Customer Purchase Declined	04/27/2023, 2:20:50 PM GMT+2	Email
Automation Customer0426093648	Customer Notification	04/26/2023, 11:46:59 AM GMT+2	Email
Automation Customer0426093648	Customer Notification	04/26/2023, 11:43:06 AM GMT+2	Email
Automation Customer0426114759	Customer Notification	04/26/2023, 8:31:05 AM GMT+2	Email
Automation Customer0426114759	Customer Notification	04/26/2023, 8:25:47 AM GMT+2	Email

- If a user attempts to navigate to a restricted module (through URL override), they will be presented with a permission denied message. Similarly, API calls made by a user without permissions to view that data will return a permission denied message.



The screenshot shows the 'Partners' page in the StreamOne Ion Enterprise interface. The page displays a table with columns for Partner Name, Type, Primary contact, Primary contact email, Cloud providers, and Created At. Below the table, it says 'No Rows To Show'. At the bottom of the page, there is a red error message: 'There was a problem with the server. Internal details. PermissionDenied. Error: user does not have access to this resource'.