infinigate cloud

Digital Platforms

Assigning Roles within CORE (Partners & MSPs)

This document has been created to articulate the roles available in CORE and how to assign them to your staff members.

Contents

Overview

There are four main roles that are made available to you once created and onboarded as a Partner. This document aims go briefly go over these roles to articulate what they can be used for, and some nuances around roles/privileges in the platform.

Roles (UX1)

6 Primary roles exist in CORE and are available for you to assign to your own staff members.

- Account Administrator
  - The highest level of privileges to provide a user with; giving access to all actions of your Partner account and the end-customers beneath.
- Global Admin
  - Similar to Account Administrator but with less billing permissions to the account.
- Billing Admin
  - Privileges assigned are anchored around billing (e.g. costs, prices, discounts, promotions, but restricted access to manage the marketplace, import customers etc.
- Admin Agent
  - Primarily role to adjust users & subscriptions without access to billing and marketplace.
- User Management
  - Primarily role to adjust only users and not subscriptions/marketplace.
- Staff member defaults
  - Close to read/view only permissions, restricted access but allows login.

NOTE: These roles above are assigned inside UX1 and are separate to the billing roles that exist in the platform. Although the above roles restrict your access/permissions, there are billing roles/privileges that could be added alongside that will give more access. This can lead to someone having "Staff member defaults" assigned, but "Full Access" in the billing/classic side of the platform which gives the user additional permissions.

Assigning Roles

To assign roles and create a new user, do the following:

1. Login to CORE (https://core.infinigate.cloud)
2. Navigate to the "Users" section (if you are created more users for your Partner account)
3. Click 'Add New Users'
4. In the wizard you will be prompted for basic information.
   a. **Note:** Selecting "Allow user to manage assigned services only" is largely defunct and can be ignored unless using legacy services. It will create a service user instead of a staff member (user instead of admin).
5. Once the basic information is entered and you select "Assign staff member roles to user" you will be prompted to choose from the roles above.

Add New Users

1 Basic Information

SPECIFY NEW USER

First Name
`Test`

Last Name
`User`

Email
`test@infinigate.cloud`
This email address will be used to sign in and receive notifications.

Access Rights
○ Allow user to manage assigned services only
● Assign staff member roles to user
  - ☑ Staff member defaults   ☑ Account Administrator   ☑ User Management
  - ☑ Billing Admin   ☑ Admin Agent   ☑ Global Admin

Address Line 1
`Test Address`

Address Line 2 (Optional)
`Test Line 2`

City
`Fareham`

Country
`United Kingdom`

State
`Hampshire`

Zip Code
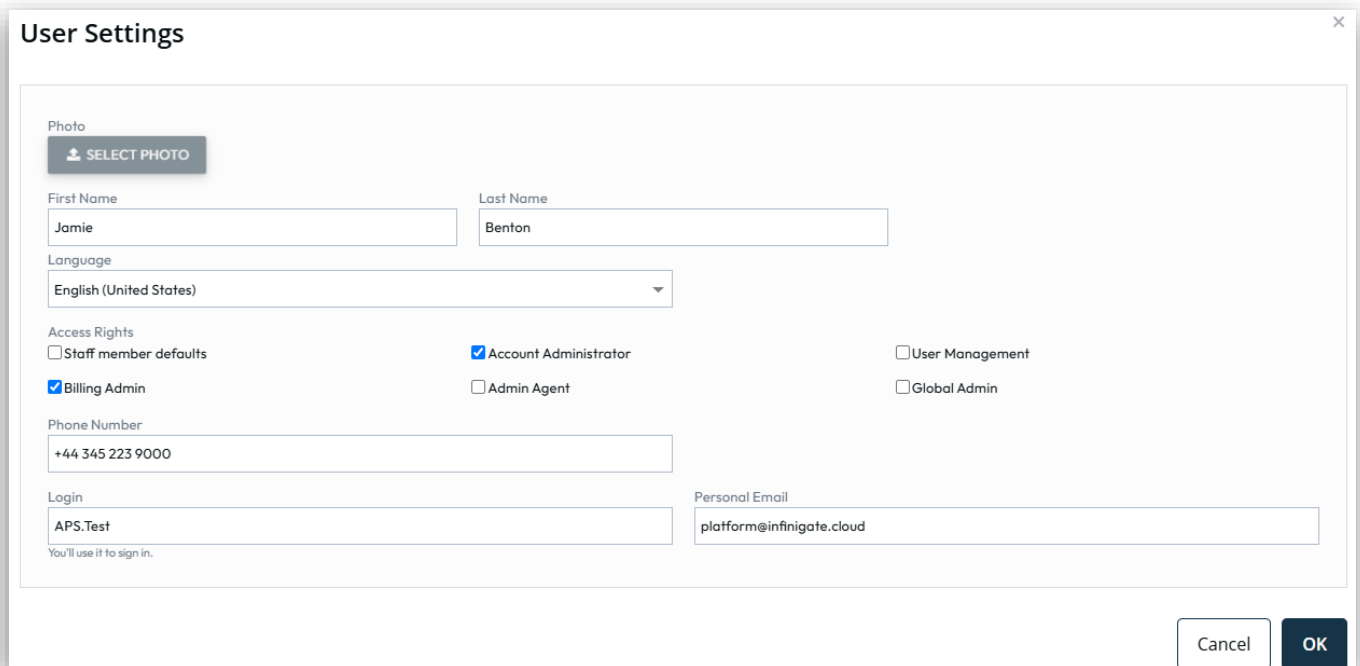`PO16 8UX`

Phone Number
`+441329242588`

ONE MORE USER

SELECT OPTIONS

☐ Send activation email to users
Users will be given an activation link to log in to the Control Panel and enable services assigned.

To assign roles to an existing user, do the following:

1. Login to CORE (https://core.infinigate.cloud)
2. Navigate to the "Users" section
3. Click the user in the list
4. Click "Edit" under user settings
5. Tick the relevant access rights and click "Ok" to apply

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