

OptimalCloud v5.0 Quick Start Guide

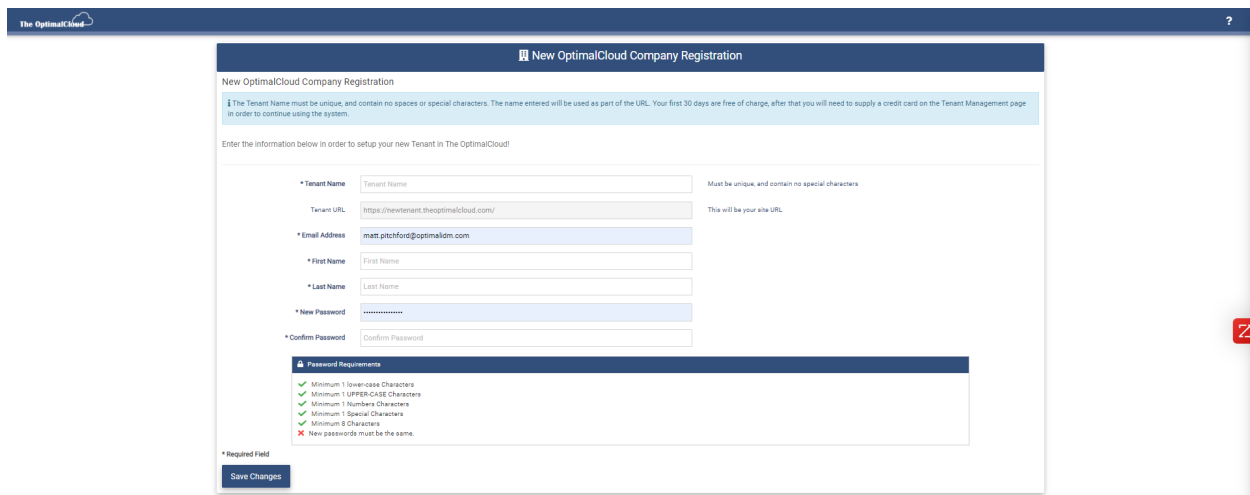
The OptimalCloud v5.0 is a fully cloud-hosted Identity and Access Management platform. The OptimalCloud supports Federation (OAuth2, OpenID Connect, SAML 2.0, and WS-Federation), Identity Management, Multi-Factor Authentication (MFA), Developer Services, Auditing, and Reporting.

To sign up for the OptimalCloud service this simple and easy-to-follow Quick Start Guide will show you how to:

- Register your tenant (your site)
- Configure your tenant
- On-board users
- Set up your first federated application

Register Your Tenant

To register your tenant go to the following URL: signup.theoptimalcloud.com



The screenshot shows the 'New OptimalCloud Company Registration' form. At the top, it says 'New OptimalCloud Company Registration'. Below this, a note states: 'The Tenant Name must be unique, and contain no spaces or special characters. The name entered will be used as part of the URL. Your first 30 days are free of charge, after that you will need to supply a credit card on the Tenant Management page in order to continue using the system.' The form asks to 'Enter the information below in order to setup your new Tenant in The OptimalCloud!'. The fields are: * Tenant Name (with a note 'Must be unique, and contain no special characters'), Tenant URL (pre-filled with 'https://newtenant.theoptimalcloud.com/' and a note 'This will be your site URL'), * Email Address (pre-filled with 'matt.pitchof@optimalidm.com'), * First Name, * Last Name, * New Password, and * Confirm Password. Below these fields is a 'Password Requirements' section with a list of requirements: Minimum 1 Lower-case Characters, Minimum 1 UPPER-CASE Characters, Minimum 1 Numbers Characters, Minimum 1 Special Characters, and Minimum 8 Characters. A red 'X' icon indicates that 'New passwords must be the same'. At the bottom left, there is a 'Required Field' label and a 'Save Changes' button.

Once you go to the Tenant Self-registration page, enter the name for your Tenant. The Tenant name is usually the main domain name for your enterprise, but you can use another value if needed. The Tenant name is used to determine the URL for your Tenant. If your Tenant name is “mycompany”, then the Tenant URL would be:

<https://mycompany.theoptimalcloud.com>

In addition to the Tenant name, you will also need to provide the email, first name, last name, and password for the first tenant administrator of your new Tenant. You will receive an email at that email address which will include a link that you need to click on in order to finish the Tenant registration.

Enter the information below in order to setup your new Tenant in The OptimalCloud!

* Tenant Name	<input type="text" value="mycompany"/>	Must be unique, and contain no special characters.
Tenant URL	<input type="text" value="https://mycompany.theoptimalcloud.com/"/>	This will be your site url.
* Email Address	<input type="text" value="Email Address"/>	Enter Email Address.
* First Name	<input type="text" value="First Name"/>	Enter First Name.
* Last Name	<input type="text" value="Last Name"/>	Enter Last Name.
* New Password	<input type="text" value="New Password"/>	Enter new password.
* Confirm Password	<input type="text" value="Confirm Password"/>	Confirm new password.

Configure Your Tenant

After your Tenant is registered there are a number of configuration options available. After you sign in, the Tenant configuration options are available under the Administration tab in the My Tenant page.

i General	Support	Self Registration	Social Media	Dates	Billing	Invoices	Plans
Tenant Support Email	<input type="text" value="support@mycompany.com"/>	Email address support emails are sent to when entered by the end user					
Enabled Support Access	<input checked="" type="checkbox"/> YES	Enabling this option will allow The OptimalCloud support team access to your site as administrator.					

On the support tab, you can configure an email in your email domain for users to send support inquiries to. If you set the toggle “Enable Support Access” to Yes, that will allow the OptimalCloud support team to access your Tenant as an administrator to troubleshoot issues.

i General	Support	Self Registration	Social Media	Dates	Billing	Invoices	Plans
Enable Self-Registration	<input checked="" type="checkbox"/> YES	Enabling this option will allow users to self-register.					

On the Self Registration tab, you can enable Self-Registration on your Tenant. If enabled, users will be able to self-register to your Tenant. If disabled, users will need to be on-boarded by an administrator.

i General	Support	Self Registration	Social Media	Dates	Billing	Invoices	Plans
Enable Facebook Social Media	<input checked="" type="checkbox"/> YES	Enabling this option will allow users to self-register and authenticate via Facebook.					
Enable Google Social Media	<input checked="" type="checkbox"/> YES	Enabling this option will allow users to self-register and authenticate via Google.					

On the Social Media tab, you can choose which Social Media can be used for authentication. If Self-Registration is enabled and a Social Media site is enabled, users will be able to Self-Register with that Social Media. If Self-Registration is disabled but a Social Media site is enabled, users will be able to self-add that Social Media as an alternative authentication mechanism.

If Social Media is enabled, it is considered the least secure method of authentication. You can create Authentication rules to determine when users would need to use stronger authentication, such as Multi-Factor authentication.

You can also Brand your tenant. You can specify the title, logo, and colours of your Tenant. To do that open a help desk ticket with Optimal IdM support and include the branding information you want on your Tenant.

On-Board Users

Once your Tenant is configured there are a number of ways to on-board your users. If you enabled Self-Registration, you can invite them to self-register. On the user drop-down menu in the upper right there is an “Invite Users” option. Just enter a comma separated list of email addresses and each of those email addresses will receive an email with a link to the Self-Registration page.

Users can also be on-boarded administratively. Users can be on-boarded individually or in batch. To on-board users administratively go to the Identity Management tab and select the User Manager page. Click on the “Create New User” button to create a single new user. Once created the new user will receive an email that contains a link that they can use to set their password.

Profile	Groups	Organizations	Applications
* Display Name	<input type="text" value="Display Name"/>		
* First Name	<input type="text" value="First Name"/>		
* Last Name	<input type="text" value="Last Name"/>		
* User ID	<input type="text" value="User ID"/>		
* Email Address	<input type="text" value="Email Address"/>		
Mobile	<input type="text" value="🇺🇸 Mobile"/>		
Phone	<input type="text" value="🇺🇸 Phone"/>		

* Required Field

You can also on-board multiple users using a CSV file. To on-board using a CSV file, go to the Administration tab and select the Job Manager page. Create an Import job and select the CSV file containing the users to import.

Job Type	<div>Import Data</div>
* Name	<div>User On-boarding</div>
Enabled	<div>YES III</div>

Object Type	<div>USERS</div>
Upload File	<div><div>Choose File</div> No file chosen</div>

Set up Your First Federated Application

To set up your first federated application (service provider), go to the Administration tab and select the Service Providers page. Click on the “Create Service Provider” button and you will be taken to the Service Provider Wizard. The OptimalCloud supports WS-Federation, SAML 2.0, OAuth2, and OpenID Connect. For this example we will show setting up a SAML 2.0 Service Provider.

New Service Provider Wizard

1

 Getting started...

This wizard will guide you through the creation of your new Service Provider trust

Let's Get Started →

Service Providers can be configured manually, from a Metadata URL, from a Metadata file, or from a template.

New Service Provider Wizard

2 Entry Type

How would you like to create your new Service Provider?

☒ Manual Entry

☐ Create from Metadata URL

☐ Create from Metadata XML File

☐ Create from Template

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New Service Provider Wizard

3 Details

Provide some basic details below:

SAML2 Test App

Enter Service Provider 'Friendly Name' here *

myuser@mycompany.com

Enter Service Provider Contact Info here (name, email, etc.) *

☐ WS-Federation

☒ SAML2

☐ OAuth2 / OpenIdConnect

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Now that the Service Provider has been created you can edit any of the settings.

General	Endpoints	Security	Authorization	SAML2	Claims / Attrs	Dates
* Wildcard Validations						
Enabled	<input checked="" type="checkbox"/> YES III		Checking this will enable this application for use in the system.			
Protocol	<input type="text" value="SAML2"/>		Federation Protocol that this application supports.			
* Application Name	<input type="text" value="SAML2 Test App"/>		Name of the Application.			
* Contact Info	<input type="text" value="myuser@mycompany.com"/>		Person(s) responsible for this application.			
* URN / Identifier	<input type="text" value="urn:saml2:template"/>		This is the unique identifier of the application. Also referred to as the URN or Issuer.			
Use Global Issuer/URN	<input checked="" type="checkbox"/> YES III		Only uncheck this feature if this application requires a unique or different issuer than what is defined globally.			
Issuer/URN	<input type="text" value="https://dev.theoptimalcloud.net/v5.0"/>		This is the custom 'Optimal Cloud' IdP Issuer/URN if required.			

To show the new Service Provider as a icon in the Portal you will need to create an Application and associate it with the new Service Provider. To create an Application, go to the Identity Management tab and select the Application Manager web page. Click on the “Create New Application” button.

Profile	Presentation	Members	Administrators
* Application Name	<input type="text" value="SAML 2.0 Test App"/>		
Description	<input type="text" value="Description"/>		
Min AuthN Level	<input type="text" value="PWD"/>		

On the Presentation tab, select “Show” and pick the new Service Provider.

Profile

Presentation

Members

Administrators

To enable this application to be present on the Portal page, select 'Show' from the 'Display Options' dropdown, then enter the remaining information for the App to be shown. The URL may be the entry point to the application or it may also be an IdPinitiated URL such as:

`[[URL_ROOT]]?spurn=MyEncodedApplicationURN`
(Note: The 'spurn' querystring parameter MUST be urlencoded)

Display Options

Show

Linked Service Provider

SAML2 Test App (urn:saml2:template)

Tab/Type

General

URL

https://mycompany.com/saml2testapp/|

Title

SAML2 Test App

Image

_Use Font-Awesome Icon from b

Font-Awesome Icon (ex: fa-globe)

fa-globe

For more font-awesome icons, go here: [Font Awesome Icons](#) Remember to prefix the icon with 'fa-'

[→ Generate IdP Initiated URL](#)