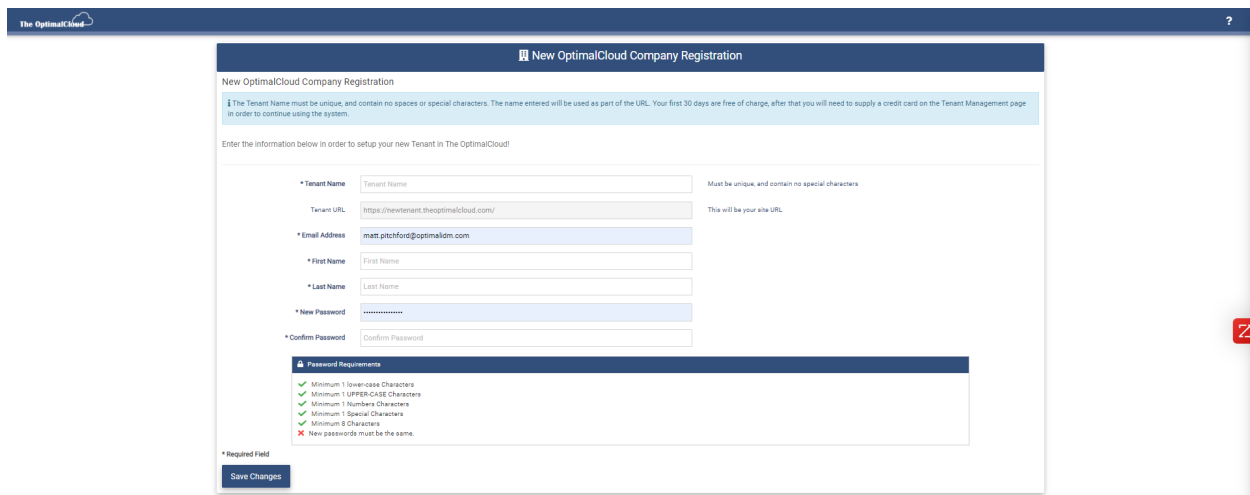# OptimalCloud v5.0 Quick Start Guide

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

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 additional 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	mycompany	Must be unique, and contain no special characters.
Tenant URL	https://mycompany.theoptimalcloud.com/	This will be your site url.
* Email Address	Email Address	Enter Email Address.
* First Name	First Name	Enter First Name.
* Last Name	Last Name	Enter Last Name.
* New Password	New Password	Enter new password.
* Confirm Password	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.

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.

On the Self Registration tab, you can enable Self-Registraion 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.

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 addesses will receive an email with a link to the Self-Registration page.

Users can also be on-boarded administratively. Users can be on-boarded indivually 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.

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 | Import Data

* Name | User On-boarding

Enabled | YES

Object Type | USERS

Upload File | Choose File | No file chosen

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 yoru 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

← Back   Next →

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

← Back   Next →

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

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.

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