Technical Documentation

Federated login

Opus Neo

RESUME

This document is to describe and document the changes and products that is implemented in a clients server environment in regards to Federated login using IBM Connections Cloud and OKTA.

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Introduction

This document is to describe and document the changes and products that has been implemented by Opus Neo in the client server environment in regards to Federated Login using IBM Connections Cloud and OKTA.

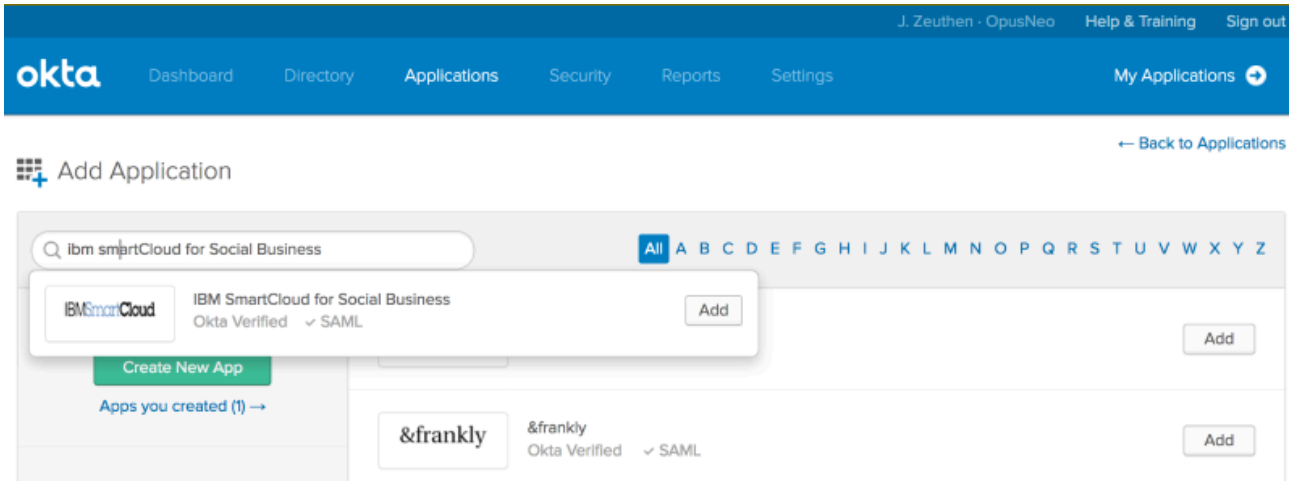
1. OKTA

1.1 Create OKTA APP "IBM SmartCloud for Social Business"

This App has already been prepared for the IBM datacenters including the test instance "CA1 Test". IBM requires new SAML assertions be tested with the CA1 before creating the production integration.

This means two Apps needs to be created. After the testing for CA1 has been completed, you can create the future production App.

Locate the "IBM" app by typing in the "quick find" field. Choose "IBM SmartCloud for Social Business" and click the "Add" button:



1.2 General settings

In the field "Distribution Centre Environment" select the "CA1 Test" system. You can update the application label if needed. Click "Next button.

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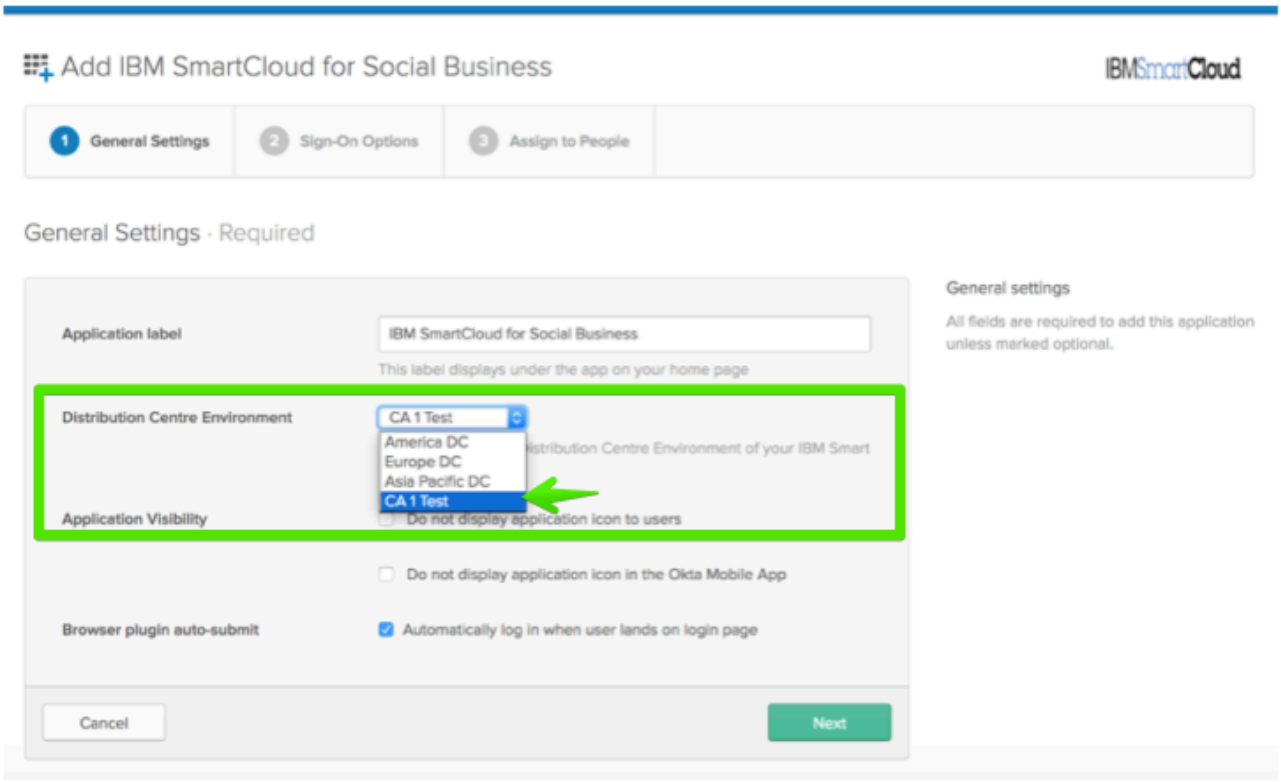

1.3 Sign on methods

The sign-on method determines how a user signs into and manages their credentials for an application. Some sign-on methods require additional configuration in the 3rd party application.

These settings is needed:

- Choose the "SAML 2.0" method.
- Enter the "Default Relay State Url. This is the Url that is redirected to after the SAML assertion. For the CA1 it is: https://apps.collabservnext.com. In a production setup, it would be the appropiate Url for datacenter (na, ce and others)

  NOTE! If you are using another solution in concert with IBM Connections Cloud, you could enter that application launch url here.
  This field can be updated after the App has been created.

- Select "Email" as the Application username format

Return to this page to download the metadata.xml after the App has been saved.

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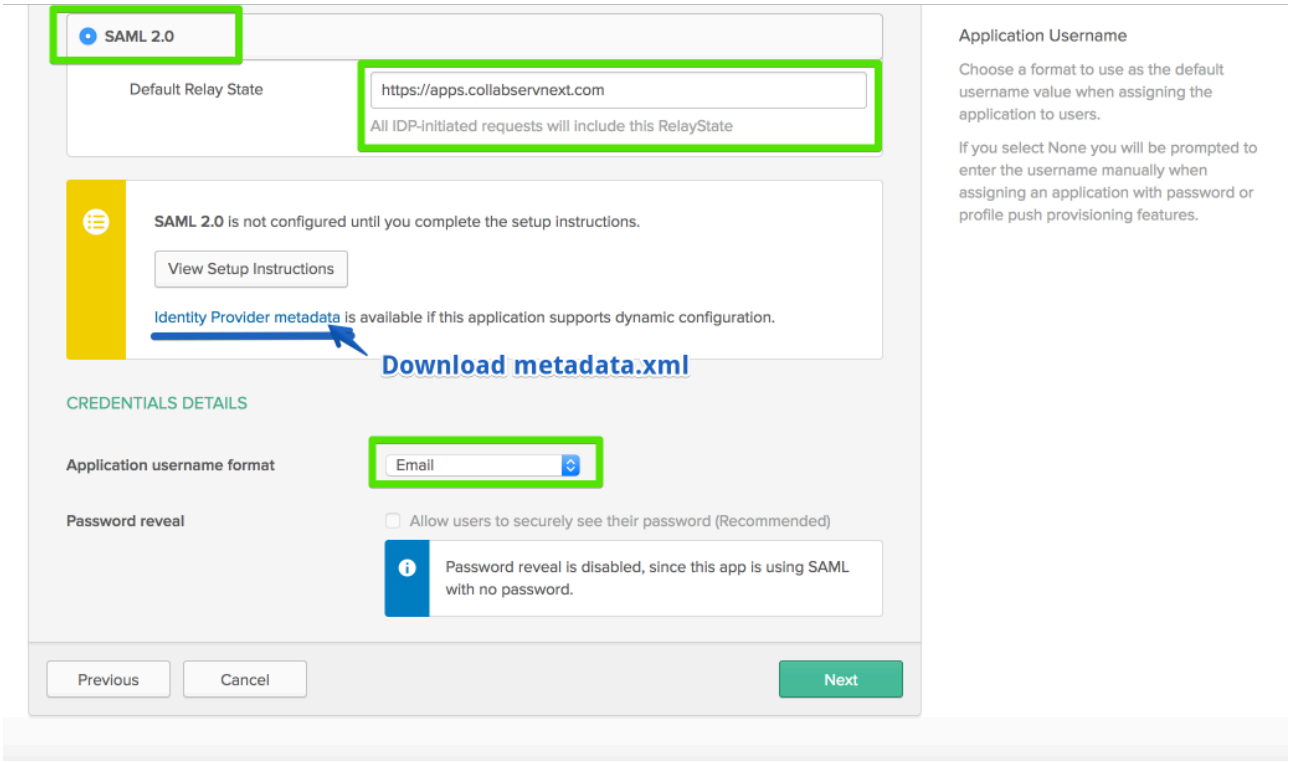
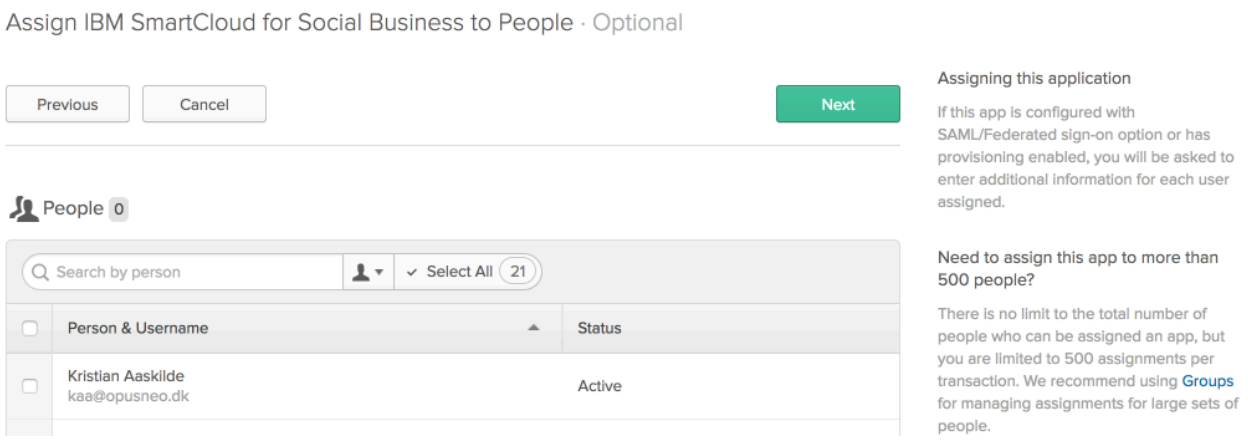


Click "Next button.

1.4 Assign IBM SmartCloud for Social Business to People

This step is optional.



Click the "Next" button.

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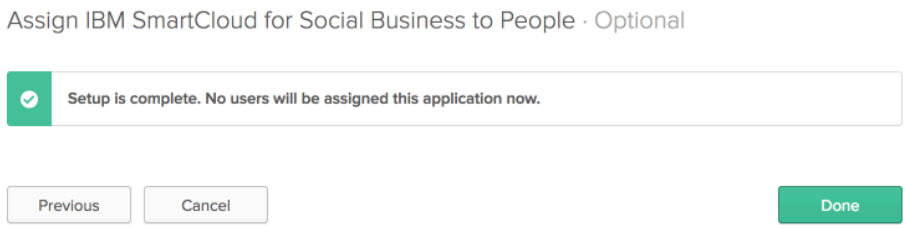
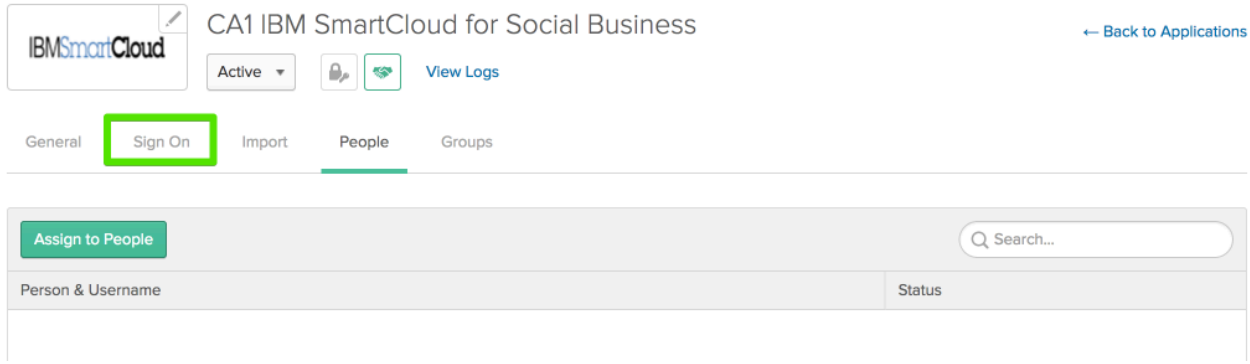
Setup is complete.

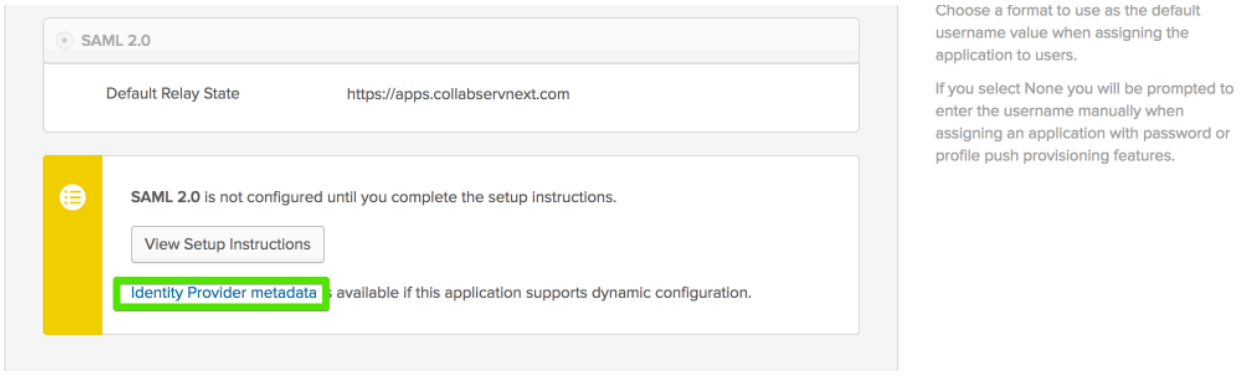


Click the "Done" button.
Your App has been created.



1.5 Retrieve the metadata.xml file

Click the "Sign On" link to open that page.



The text “Identity Provider metadata” is the link for the Metadata.xml file. Save the file to your disc.

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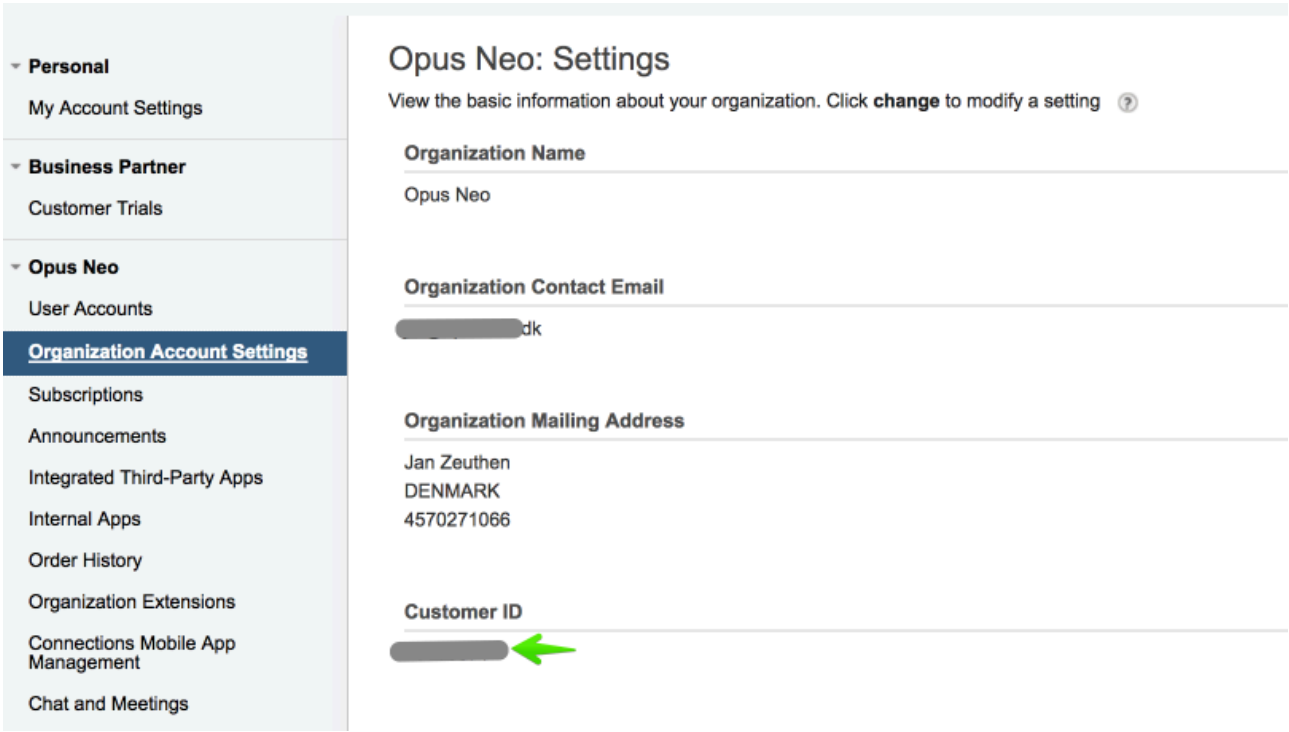
2. Contact IBM Cloud Support

Send the metadata.xml file to IBM Cloud support (cloudcsg@us.ibm.com) including this information:

1) Data center
CA1 Test (alternatives: Europe (apps.ce), North America (apps.na) etc.

2) IdP metadata:
Link for downloading the metadata.xml

3) Customer ID:
Locate the customer ID in IBM Connections Cloud. You need to have the Admnistrator role. In the banner, click on "Admin" - "Manage Organisation". In the left navigation open the "Organizations Account Settings" - Locate the "Customer ID".



4) Test Account:
This user should exist in your production account and in Okta! Select any live user account.

ID/Name: Jacob Dash
E-mail: jdash@opusneo.com

5) Federated Identity Management type.
"modified"

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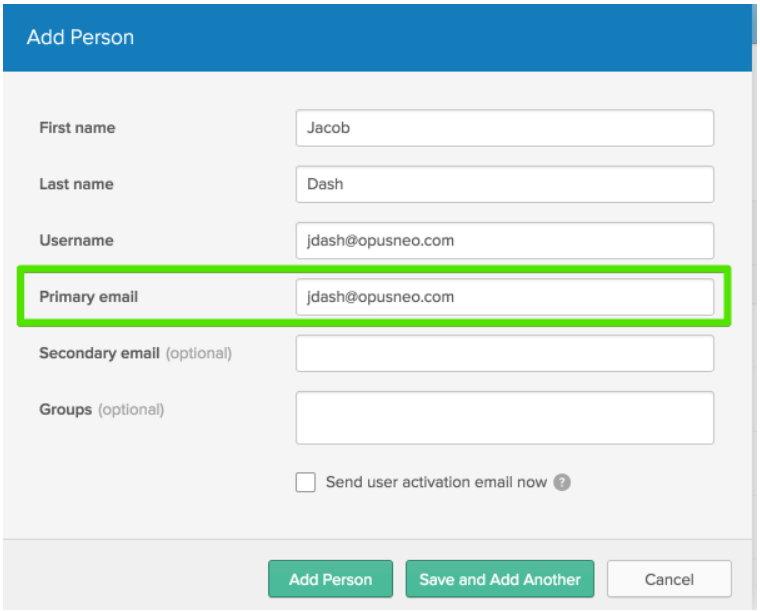
Allow IBM for some days to process the request.

3. Setup User for Federated login

When receiving the acknowledgement from IBM that the SAML assertion has been setup, you will also receive a .xml file from IBM: So far I have not found any use for this file.

3.1 Setup User Okta Acoount

If you have not done so already, create the test user in your Okta directory:



NOTE! The **primary email** is the commen key so make sure its the same in Okta and IBM Connections Cloud.

3.2 Assign the Okta App to the test user

Browse to your test user and click the "Applications" link and complete the steps below:

- Click the "Assign Applications" button.
- In the Pop-up window, select your App and click "Assign"
- Verify User Name and click "Save and go back"
- Click "Done" to save your settings.

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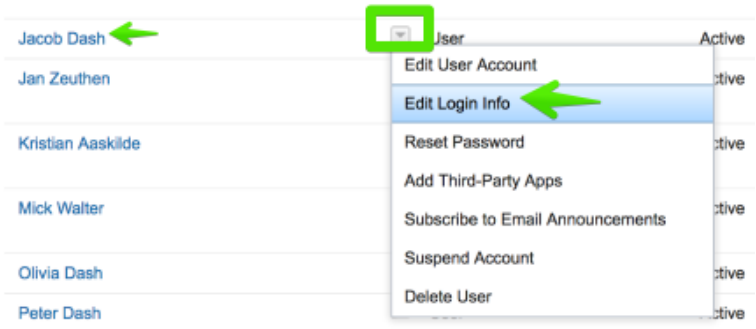
Now you can change the login method for your test user i.e. Jacob Dash.

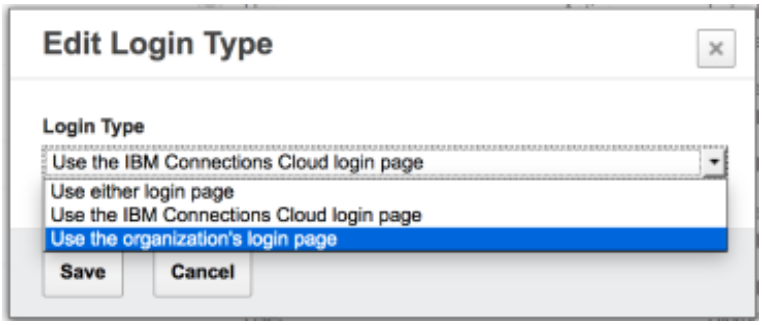
3.3 Update login method for IBM Connections Cloud User

The login method needs to be changed for your test user. COmplete these steps in the "Manage Your Account" area:

- Click on "User Accounts" in the left navigation
- Located your test user on the list
- Click the Action icon in front of the Role definition:



- Choose the "Edit Login Info" item
- Choose "Use the organization's login page" from the list



- Click "Save" button
- NOTE! This update is not visible in the user account. You need to go through the same steps above to locate the current setting!

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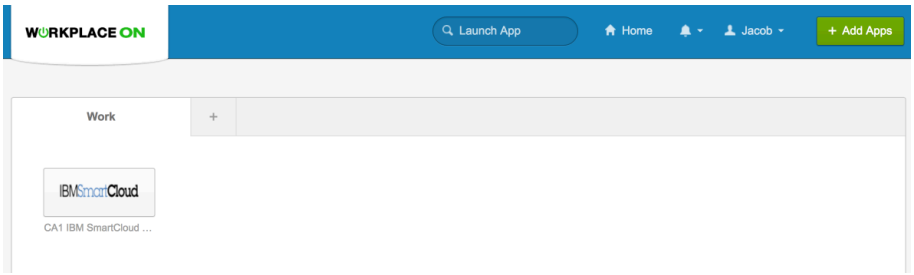
4. Test Federated Login

Now you can test the federated login:

- Go to the Okta organisation Url
- Login as the test user: jdash@opusneo.com
- After login the user is presented with the Okta App.



- Verify the user is logged in to IBM Connections Cloud without being prompted for a password

5. Setup Federated Login for production data center

The above steps needs to be completed for setting up the production Apps! This includes sending a new email til IBM cloud support with the relevant information. You test user account can be the same.

6. Things to consider:

- If using a separate Portal solution, how this can be integrated with Okta and IBM Connections Cloud. The Portal solution needs to support SAML 2.0 as well. Also in order to display information in the Portal after login through OKta, the Apps needs to be launched "simultaniously" or in a sequence.
- Also consider Log out link
- Consider "Change Password" strategy
- Decide on strategy for User Directories to administrators. How/Where is the user account created? How to deploy and how to delete user account
- Configuration for the Mobile native App using SAML. E.g. setting application passwords for mobile devices including Ipads
- Configuration for Desktop plugins using SAML

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