

# Manage Tenants

Live Forms is a multi-tenant application. Tenants allow you to segregate groups of users and roles. Users from one tenant cannot access users in any other tenant. Note: this does not apply to public forms/flow which do not require login access to a tenant.

The Live Forms In-house superuser admin can create as many tenants on your form server as needed. Once the superuser admin creates the tenant, the tenant admin user can then login to manage the tenant, configure LDAP, add users & roles, etc. See the [Admin Home Page](#) for differences between the superuser admin and tenant admin.

Live Forms trial tenants in the cloud are initially configured with the frevvo Default security Manager. Once you have purchased your Live Forms license, you can switch the Security Manager of your tenant and retain existing forms/flows, users, roles and submissions.

Tenants using the Default Security Manager can be migrated to:

- Default Security Manager LDAP
- Default Security Manager SAML
- Default Security Manager Azure SAML

Tenants using the LDAP Security Manager can migrate to:

- LDAP SAML
- LDAP Azure SAML

If you want to switch the security manager of your tenant, cloud customers should contact [sales@frevvo.com](mailto:sales@frevvo.com) to initiate the procedure.

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# Manage Tenants

The superuser for Live Forms in-house customers can add new tenants to your Live Forms server using the **Manage Tenants** page.



- Click  to add a new tenant.
- Click  to display the **Manage Tenant** page. You use the links on this page to edit the tenant information and manage the tenant's roles, users, form and control categories, and production forms.
- Click  to edit the tenant information. This link displays the same page as the Edit Tenant link on the Manage Tenant page.
- Click  to make a copy of the tenant.
- Click  to remove the tenant from the server.

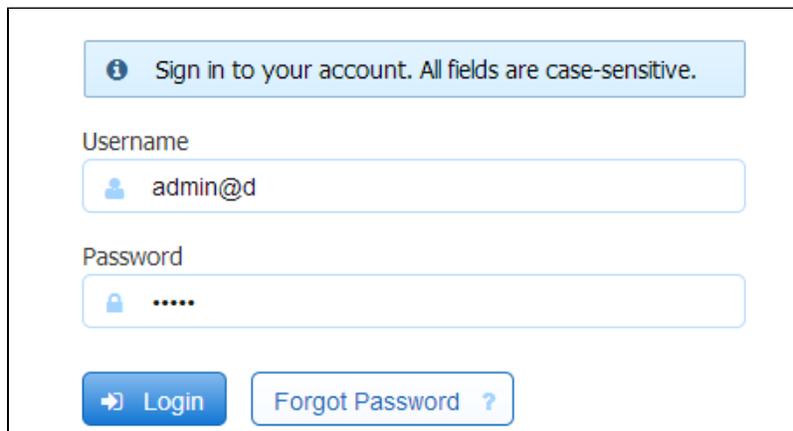
You cannot remove or copy the **d (Default tenant)**.

## Add Tenant

The superuser for in-house customers can use the Tenant page to add a new Live Forms tenant . **We recommend using lower case for the tenant name as the tenant name becomes part of your user's login names which are case sensitive.**

To display the Tenant page,

- Login as the superuser admin. Enter **admin@d** as the userID and **admin** as the password (if you did not change it). Click **Manage Tenants**.



**i** Sign in to your account. All fields are case-sensitive.

Username

Password

 Login  Forgot Password ?

- Click  the plus icon to add a new tenant.
- Fill in the fields with the information for your new tenant.
- Click the Submit button to save.

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## Add New Tenant

Please fill in the form below.

Are you creating a tenant for Confluence?

Yes

Security Manager Class ?

Frevvo Default Security Manager

Tenant Id ?

mycompany.com

Admin User Id ?

admin

Tenant Name

My Company HR

Admin User Password

.....

Tenant Description

HR Portal

Re-enter Admin User Password

.....

Max Concurrent Users ?

Admin User Email Address

admin@mycompany.com

### Business Calendar

Timezone

America/New\_York

Weekend Days

- Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

Holiday

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/1/2016	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5/30/2016	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7/4/2016	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9/5/2016	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/24/2016	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/25/2016	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12/26/2016	

Day Starts At ?

9

Day Ends At

17

▶ Http Auth Credentials

▶ SharePoint

Here is a brief explanation of the fields:

- **Are you creating a tenant for Confluence?** - Check this if you are planning on integrating Live Forms with Confluence. If checked, the Security Manager Class field displays the Delegating Security Manager - This is the Security Manager needed for Confluence. The SharePoint section of the screen is hidden. The [SharePoint Connector](#) is not available to frevvo Confluence customers as it will not work in embedded scenarios. If unchecked, the Default Security Manager will be used.
- If you are not using Confluence, select a Security Manager Option from the following choices:

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## Add New Tenant

Please fill in the form below.

The tenant id and admin user id cannot be changed once created. We recommend using a domain name syntax for the id e.g. example.com

Are you creating a tenant for Confluence?

Yes

Security Manager Class ?

Frevvo Default Security Manager
SAML Security Manager
LDAP/Active Directory Security Manager
Azure SAML Security Manager
Delegating Security Manager
Custom ...

1. **Frevvo Default Security Manager (FSM)** - Live Forms is responsible for authentication/authorization and managing users/roles. This is the default option. Your tenant will be created with this security manager if no other choice is selected.
2. **SAML Security Manager** - This security manager allows the exchange of authentication and authorization data between an identity provider of your choice (ex:Shiboleth) and a service provider (frevvo). SSO is supported. Although this security manager can be used on-premise it is primarily meant for cloud tenants who use LDAP but do not want to expose it over the internet.
3. **LDAP Active Directory Security Manager (LDAPSM)** - The user is authenticated outside Live Forms. Typically, SSO or Live Forms performs the authentication using LDAP directly.
4. **Azure SAML Security Manager** - Allows the on-premises AD to be exposed to the cloud via synchronization with Azure AD. Uses the graph API to access users and groups from AD. SAML is used for authentication only, providing single sign on.
5. **Delegating Security Manager** - this is the Security Manger needed for Confluence integration.
6. **Custom - (CSM)** - Container managed security manager used when there is a requirement for a container to handle authentication.

- **Tenant ID** - Enter the tenant Id in this field - The tenant id can contain characters, numbers, dot(.), hyphen (-) and the underscore. It cannot start with a number. A common practice is to use your domain name for the tenant id.
- **Tenant Name** - Enter the name of the new tenant.
- **Tenant Description** - Enter a description for the new tenant.
- **Max Concurrent Users** - Leave this field blank if you do not want to set a maximum number of concurrent users. [Concurrent Users](#) are users that are logged into Live Forms simultaneously.
- **Admin User Id** - This is the tenant admin id. It can contain characters, numbers and the underscore. It cannot start with a number. The maximum length is 16 characters.
- **Admin User Password** - This is the tenant admin password. Notice the text will appear as bullets as you type.
- **Reenter the Admin User Password** - Reenter the tenant admin password. Live Forms will display an error message, "Invalid Value" if what you type in this field does not match the contents of the Admin User Password field.

## Set Up the Business Calendar for your tenant

The superuser or tenant admin can set up the Business Calendar for your tenant. Live Forms will then use the calendar information when calculating an escalation deadline for workflow steps and to determine the date/time for notification/reassign emails if they are configured. A tenant can only have one Business Calendar.

In the Business Calendar section of the Add/Edit Tenant screen:

1. Select the timezone for your tenant from the dropdown. Escalation emails will display dates/times based on the selected timezone.
2. Specify the working hours by entering a value in the **Day Starts At** and **Day Ends At** fields. The start and end hours are based on a 24

- hr clock. Valid values are 0 - 23.
- 3. Check the weekend days for your tenant.
- 4. List the company holidays for the current year. You can specify holidays for future years as well.

The Business Calendar makes it very simple to configure workflow escalations based on a 5 - day work week. Once the calendar is set up, simply check the Business Calendar checkbox on the escalation condition in your workflow.

Business Calendar

Timezone

America/New\_York

Weekend Days

Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

Holiday	
+	1/1/2016
+	5/30/2016
+	7/4/2016
+	9/5/2016
+	11/24/2016
+	11/25/2016
+	12/26/2016

Day Starts At

9

Day Ends At

17

It is no longer necessary to use a rule to Calculate a Date based on a five day work week.

## Configure HTTP Authorization Credentials

Live forms offers a user interface to specify credentials to external secure web services that are accessed by the forms/flows in your tenant. For example, if you have a rule that connects to a web service or a Form/Doc action that posts to a web service that is not publicly accessible, credentials can be configured for the services in each of your tenants.

The specification of http credentials for in-house customers was previously supported globally and configured in the httpclient-auth.properties file. This method is no longer used. In-house customers using this file for HTTP authentication should read the Migration Considerations before upgrading.

To configure http security credentials at the tenant level, follow these steps:

1. The Http Auth Credentials section is at the bottom of the Edit/Add tenant screens and is initially collapsed. Click the



icon to expand it.

2. Enter the scheme from the dropdown. The admin may enter multiple credentials by clicking the



icon. Each should be for a unique scheme/host/port/realm. The supported options are:

- a. Basic - a common HTTP Authentication protocol that assumes that client credentials consist of a username and a password where the latter is a secret known only to you and the server
- b. NTLM - a Windows network authentication protocol that allows a client to prove its identity without sending a password to the server.

3. Scheme, host, user name and password are required.
4. Port is optional and may be left blank. Either blank or -1 equates to any port and the system will alter blank to be -1.
5. All fields are specified in plain text and not encoded in any way.
6. Domain is only generally used for NTLM.

Http Auth Credentials

Please enter any HTTP client credentials here. These credentials are used for secure sites accessed via Doc Action posts, rule http calls, etc.

	Scheme	Host	Port	User Name	Password	Realm	Domain
+	BASIC	dev.frevvo.com	-1	maryann	*****	frevvo Trac	

## Configuring the SharePoint Connector

Store submissions and metadata on a registered SharePoint website using the frevvo SharePoint Connector and wizard. The configuration information is discussed in the [SharePoint Connector](#) topic

## Configuring the LDAP/Active Directory Security Manager

Creating/editing the LDAP tenant is performed by the superuser (on-premise) or the tenant admin (cloud). Refer to this [documentation](#) for configuration details and [here](#) for some troubleshooting tips.

## Configuring the LDAP Container Security Manager

There are some configuration items that must be performed before creating a tenant using the LDAPContainer Security Manager. Once the prerequisites have been completed, adding a tenant that uses the LDAP Container Security Manager is exactly the same as configuring a tenant using the LDAP/Active Directory Security Manager. Please follow the steps listed here.

Refer to the [Configuring the LDAP Container Security Manager](#) topic for the instructions.

## Configuring the SAML Security Manager

Creating/editing the SAML tenant is performed by the superuser (on-premise) or the tenant admin (cloud). Refer to the [SAML Security Manager](#) topic for the details.

## Configuring the Azure SAML Security Manager

Creating/editing the SAML tenant is performed by the superuser (on-premise) or the tenant admin (cloud). Refer to [Configuring the Azure SAML Security Manager](#) for the details.

## Configuring the Database Container Security Manager

The Database Container Security Manager should be selected when authentication is the container's responsibility and you want to use the Live Forms database interface to fetch users/roles for design time functionality from an external database. Click here for the [configuration details](#).

## Edit Tenant

A tenant admin or a superuser admin can use the Tenant page to configure or edit information about a tenant.

To display the Tenant page:

- If logged in as a tenant admin click **Edit Tenant**.
- If logged in as a superuser admin click **Manage Tenants** and then click



for the tenant you want to edit.

Note that you cannot change the **Tenant Id**, although you can change the Name and Description.

## Change the tenant Security Manager

If you are planning on changing the Security Manager from the Default Security Manager to LDAP(s), SAML or Azure SAML, and you want to preserve Applications/Forms/Flows developed in your trial/starter frevvo tenant, here's what we recommend:

- **Download the Applications/Forms/Flows that you want to preserve to your desktop as a backup BEFORE changing the Security Manager.**
- **Live Forms customers should be aware that changing the Security Manager of your tenant is a ONE-WAY operation. Once you click the Change button, you cannot revert back to the original security manager.**

The following Security Manager changes can be made by clicking the **Change** button and making a selection from the dropdown. Cloud customers should contact [sales@frevvo.com](mailto:sales@frevvo.com) to initiate the procedure.

- Default Security Manager LDAP
- Default Security Manager SAML
- Default Security Manager Azure SAML
- LDAP SAML
- LDAP Azure SAML

Click the



button to see details about a field. Click **Submit** to save your changes. The message "Tenant updated successfully" will display.

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## Tenant mycompany.com

You cannot change the tenant id or the admin user name. If you want to change the admin user password, please edit the profile for that user in the Manage Users section.

Tenant Id ⓘ  
mycompany.com

Tenant Name  
mycompany.com

Tenant Description  
Demo Tenant

▼ Email Address ⓘ

Display Name	Email Address
<input type="text" value=""/>	<input type="text" value=""/>

Session Timeout (in minutes)

The deployment state drop down below is only enabled if the license for this tenant enables unlimited production forms.

Form/Flow Default Deployment State  
DEVELOPMENT

▼ Administrative User only

Max Concurrent Users ⓘ

Allow Anonymous Signups?  
 Yes

This setting overrides the URL sent by the Confluence server to frevvo. In most cases, you should leave this blank.

Security Manager Class ⓘ  
com.frevvo.security.frevvo.FrevvoSecurityManager Change

▼ Change Security Manager

⚠ Changing the Security Manager of your tenant is a ONE-WAY operation. Once completed, you cannot change it back to the original security manager.

Security Manager Class

LDAP Security Manager

SAML Security Manager

▶ Azure SAML Security Manager

▶ Http Auth Credentials

▶ SharePoint

Submit Reset

Be aware that changing the Security Manager of your tenant is a **ONE-WAY operation**. Once completed, you **CANNOT** change it back to the original security manager.

## Edit LDAP Properties

▼ [Click here to see the LDAP configuration screen](#) .

If you are editing a tenant using the LDAP/Active Directory Security Manager or the LDAP Container Security Manager configured LDAP properties will display. These [properties](#) can be modified using this screen.

LDAP
Change

▼ LDAP

Connection URL ?

TLS ?

 Yes

Connection User

Connection Password

Ignore Case

 Yes

Users Base

Groups Base

Notify

 Yes

All Groups Filter

All Users Filter

	Name	Value
+	com.sun.jndi.ldap.read.timeout	10

Attributes

<p>User Id Display</p> <input type="text" value="sAMAccountName"/>	<p>Group Id Display</p> <input type="text" value="sAMAccountName"/>	<p>User Member Of</p> <input type="text" value="memberOf"/>
<p>Group Member</p> <input type="text" value="member"/>	<p>First Name</p> <input type="text" value="givenName"/>	<p>Last Name</p> <input type="text" value="sn"/>
<p>Email</p> <input type="text" value="mail"/>	<p>Manager</p> <input type="text" value="manager"/>	<p>Custom</p> <input type="text" value="carLicense,telephoneNumber,initials"/>

## Edit SAML Properties

▼ [Click here to see an image of the SAML configuration screen](#)

If you are editing a tenant using the SAML Security Manager, configured metadata and attribute mappings will display. These values can be modified using this screen.

▼ SAML

▼ Service Provider

Metadata

```

          <md:EntityDescriptor xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata" ID="http___localhost_8082_frewo_wi
          LmNvbTAeFw0xNTA1MDYxOTUwNTVaFw0yNTA1MDMxOTUwNTVaMBkxZzAVBgNVBAMTDmFwcC5mcmV2
          dm8uY29tMIIjJANBgkqhkiG9w0BAQEFAAOCAQ8AMIIBCgKCAQEApK7w7PcGnIr/OK4i2p7tW3N8
          </md:EntityDescriptor>
          </pre>

```

▼ Identity Provider

Metadata

```

          <EntityDescriptor xmlns="urn:oasis:names:tc:SAML:2.0:metadata" xmlns:ds="http://www.w3.org/2000/09/xmld
          <IDPSSODescriptor protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol urn:oasis:names:tc:SA
          <Extensions>
          </IDPSSODescriptor>
          </EntityDescriptor>
          </pre>

```

Ignore Case

 Yes

Authentication Only

 Yes

<p>User Id</p> <input style="width: 95%;" type="text" value="urn:oid:0.9.2342.19200300.100."/>	<p>First Name</p> <input style="width: 95%;" type="text" value="urn:oid:2.5.4.42"/>	<p>Last Name</p> <input style="width: 95%;" type="text" value="urn:oid:2.5.4.4"/>
<p>Email</p> <input style="width: 95%;" type="text" value="urn:oid:0.9.2342.19200300.100."/>	<p>Manager User Id</p> <input style="width: 95%;" type="text" value="urn:oid:0.9.2342.19200300.100."/>	<p>Groups</p> <input style="width: 95%;" type="text" value="urn:oid:1.3.6.1.4.1.5923.1.1.1.7"/>
<p>Custom</p> <input style="width: 100%; height: 20px;" type="text"/>		

Remember, if you check the Authentication Only checkbox, only the User Id field displays for mapping.

### Edit Azure SAML Properties

- ▼ [Click here to see an image of the Azure SAML configuration screen](#)

If you are editing a tenant using the Azure SAML Security Manager, configured metadata and attribute mappings will display. These values can be modified using this screen.

▼ SAML

▼ Service Provider

Metadata

```
<md:EntityDescriptor xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata" ID="http___localhost_8080_frevwo_web_alias_azuread" entityID="http://localhost:8080/frevwo/web/alias/ldap">
<md:SPSSODescriptor AuthnRequestsSigned="true" WantAssertionsSigned="true" protocolSupportEnumeration="
```

▼ Identity Provider

Metadata

```
<EntityDescriptor xmlns="urn:oasis:names:tc:SAML:2.0:metadata" ID="_e9a5b55b-01b2-46b5-ac5f-ec7eb9e32a76" entityID="https://sts.windows.net/fece6b7e-fbc6-4b3a-8287-fc07c29aa2d2/">
<IDPSSODescriptor protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">
```

Ignore Case

Yes

User Id

Custom

▼ API Access

Tenant Id  Client Id

Client Secret

Authentication Only is checked so only the field for User Id mapping is displayed.

### Edit the Business Calendar

Changes to the Business Calendar can be made in the Business Calendar section:

▼ Business Calendar

Timezone

Day Starts At  Day Ends At

Weekend Days

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Holiday	
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	1/1/2016
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	5/30/2016
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	7/4/2016
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	9/5/2016
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	11/24/2016
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	11/25/2016
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	12/26/2016

### Edit HTTP Authentication Credentials

Changes to the HTTP Authentication Credentials can be made by expanding the section:

▼ Http Auth Credentials

Please enter any HTTP client credentials here. These credentials are used for secure sites accessed via Doc Action posts, rule http calls, etc.

	Scheme	Host	Port	User Name	Password	Realm	Domain
+	BASIC	dev.frevvo.com	-1	maryann	*****	frevvo Trac	

## Edit the SharePoint Configuration

Make changes to the [SharePoint Connector](#) in this section.

▼ SharePoint

Connector URL

[🔗](#) https://<server>:<port>/sharepoint

Client Id Client Secret

[🔗](#) 441f3f08-90db-4248-a079-ba632eebd1db [🔗](#) 8cTPqNHX9nGA/eHdbqyrWPK/UCRQF6dggqX8Ss0rMb

Domain Realm

[🔗](#) frevvo.sharepoint.com [🔗](#) 3d532ac1-a43c-45c7-b0e9-cc814400ca11

## Email Address

The email address entered in this section is used as the from email address for email notifications and doc action emails for forms and workflows in the tenant. If you want to setup the email address with a user friendly name, enter the text in the Display Name field. The [Document Action](#) and [Activity Document action email](#) wizards have a From: address field. You can specify a different from email address for Document Actions and Activity Document action emails by entering a valid email address in the from field in both wizards. The values in these fields overrides the address entered on the Edit Tenant screen.

Refer to the [Email configuration](#) or [integration](#) topics for more information.

## Session Timeout

A user designing a form, viewing their task list, or using a form to enter values and submit has a certain number of minutes to complete the activity. This time limit is called the **Session Timeout**. By default the session will expire after 30 minutes of inactivity. When the session expires a designer user will have to re-login to Live Forms to continue designing forms and users filling forms will have to get new form instance and re-enter the values. The tenant admin can override the default session timeout with the value that is entered into the Session Timeout field.

## Max Concurrent Users

The **Max Concurrent Users** field only appears if you are logged in as a superuser admin. This field enables you to restrict the number of users who can simultaneously login to a particular tenant. For example if you have purchased and installed a 20 user license key and want to set tenant A to use 5 and tenant B to use 15, setup that configuration here. See [Concurrent Users](#) for more information.

Max Users is subject to your license.

## Deployment State

The **Deployment State** lets you toggle the default deployment state of your form between two states: PRODUCTION and DEVELOPMENT. When a form is in development state it contains a watermark. If you have a Live Forms unlimited user license key you may want all the forms created by the designer to automatically be deployed for production with no watermark.

See also the [deployment form property](#).

## Anonymous Signup

Anonymous signup lets you publish a registration Url for your tenant so people can signup and create a user account in your tenant themselves. In the Edit Tenant form, check the anonymous signup property and then select the default roles you want them to have when they signup. You can click the "+" to add multiple roles. If you select the designer [role](#), these new users will have permission to design forms and workflows.

Allow Anonymous Signups?

Yes

Anonymous User Default Role(s) +

Guest ▼

Then publish the registration Url:

```
https://www.frevvo.com/frevvo/web/tn/<your tenant name>/register?edit=true
```

At this Url people will see a signup form.

### Register

Please fill in the form below.



User Name ?

guest

Password

•••••

Re-enter password

•••••

First Name

MaryAnn

Last Name

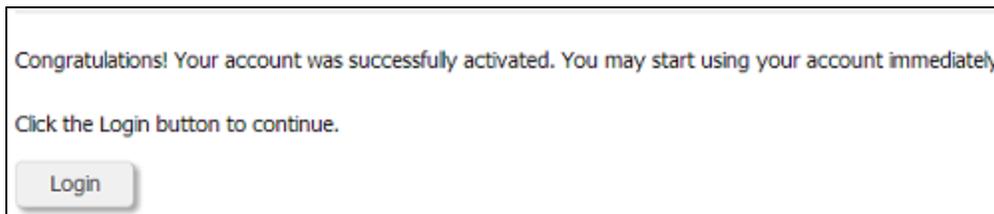
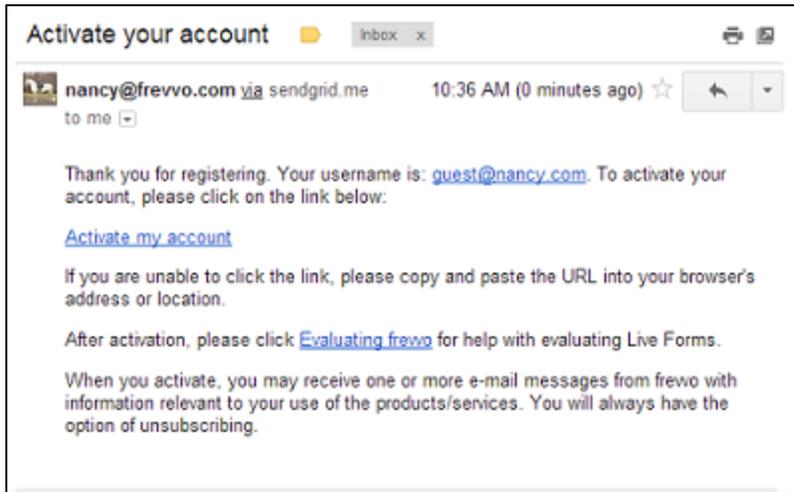
Rapuano

Email

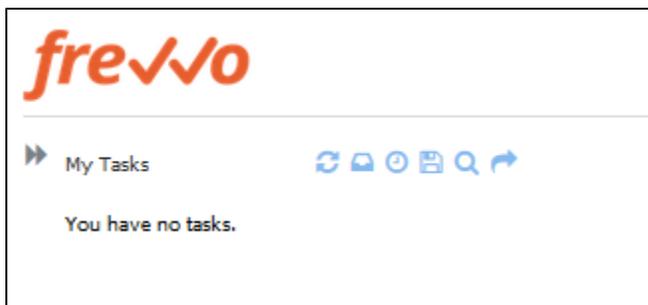
maryann.rapuano@frevvo.com

Thank you for registering. An activation email has been sent to your account.

When they submit this form they'll be notified via email to activate their account. Until they activate via the email their account will remain disabled.



Now this person has a user account on your tenant and can login. If you gave them the Live Forms designer role they will also be able to create forms and workflows. If not, when they login, they will see their task list as shown below.



Tenants configured with an LDAP or SAML Security Manager do not display the Anonymous Signup checkbox as this feature is not applicable for an LDAP or SAML tenant.

## Tenant Setup

To setup your tenant, first login to your new tenant as the tenant admin. The tenant admin can add users to the tenant. You need to add at least one designer user in order to begin creating forms.

We strongly recommend that you do not use the admin user to create your own forms. You can create users and roles in your new tenant for that purpose.

1. Click the **Manage Roles** link.
2. You will see several pre-created roles: frevvo.Designer, frevvo.Editor, frevvo.Publisher, frevvo.ReadOnly.
3. Click the  icon, fill in the form and submit it to create new roles e.g. Employee or Manager.
4. Click the **Back to Manage Tenant** link.
5. Next click the **Manage Users** link.
6. For Live Forms In-house you will see a single user – the administrative user you defined when you created the tenant. Note that you will have to click the link to display All users. By default, only users beginning with the later A are displayed. For Live Forms Online you will

see two users – the administrative user and the designer username you specified when you signed up for your trial SaaS account.

7. To create a new user with permissions to create forms, click the



icon, fill in the form and select the role **frevvo.designer**. If you do not select this role then this new user will not be able to create forms but will only be able to use forms created by others.

8. The new user will be created. Create as many users and assign them roles as needed.
9. Logout of the tenant admin account and login as one of the newly created users with the frevvo.Designer role and start building forms and workflows.
10. Note that you must login using either the syntax: `userid@tenant` for the user name. For example, if the newly created tenant was named `example.com` then all users in that tenant must login using the ID: `user@example.com`. If you prefer to enter the username and tenant name in their own login page input fields, the configuration parameter, `frevvo.login.show.tenant`, can be modified to display the tenant name input field.

## Related Topics

[User Authentication](#)

[Concurrent Users](#)

<https://frevoit.atlassian.net/browse/TIP-21206>