

# Security Managers

## About

Live Forms has a pluggable security framework and offers a variety of built-in Security Managers. If you use the Live Forms **Default Security Manager**, a [tenant admin](#) can create users and roles directly in your Live Forms tenants. See the [Manage Users](#) and the [Manage Roles](#) for instructions on creating users and roles. Note that with LDAP Security Manager and Delegating Security Manager, groups are the equivalent of Live Forms roles.

Live Forms also supports two types of [LDAP Security Managers](#) that pull users and groups from your external Active Directory or Open LDAP system; a [Delegating Security Manager](#) when you are integrating Live Forms with Confluence ; a SAML Security manager that allows enterprises to take advantage of Internet Single sign On and custom security managers that lets you integrate with a security manager that you build yourself.

- frevvo Security Managers are an Add on feature with additional costs.
- frevvo only supports/certifies Security Managers when Live Forms is running in the Apache Tomcat container. Refer to our [Supported Platforms](#) for the list of Application Servers supported/certified by frevvo.

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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 ...

## Live Forms

### Security

#### Managers

##### Working with LDAP

- [Configuring the LDAP Security Manager for In-house](#)
- [Configuring LDAP\(s\) for Cloud tenants](#)
- [Configuring the LDAP Container Security Manager](#)

##### SAML Security Manager

##### Azure SAML Security Manager

##### Which Security Manager do I choose?

##### Changing the Security Manager for your Tenant

- [frevvo Default Security Manager](#) - 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.
- [SAML Security Manager](#) - This security manager allows the exchange of authentication and authorization data between an identity provider of your choice (ex:Shibboleth) 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.
- [LDAP Active Directory Security Manager](#) - The user is authenticated outside Live Forms. Typically, SSO or Live Forms performs the authentication using LDAP directly.
- [Azure SAML Security Manager](#) - This security manager uses SAML in Authentication Only mode and the Active Directory available in the Microsoft Cloud solution, Azure. Integration with the Azure API enables Live Forms queries. On-premise AD services can be exposed via Azure providing a clean way to integrate with the frevvo cloud.
- [Delegating Security Manager](#) - this is the Security Manger needed for Confluence integration.
- Custom - Container managed security manager used when there is a requirement for a container to handle authentication.

## Which Security Manager do I choose?

Many frevvo customers use the Default Security Manager. All tenants are initially created with this Security Manager. It is the simplest security

manager because it does not require integration with an external IDP. Users/roles are managed by the tenant admin.

Live Forms offers additional Security Managers, implemented to industry standards, that may be more compatible with your environment. You must have the expertise for setting up your security infrastructure in such a way that whatever choice you make (cloud, ldap, saml, azure) is in fact secure and in compliance with any/all of your auditing requirements.

Selecting a Security Manager for your Live Forms tenant is a very important decision. The table helps you make the choice.

	LDAP	SAML	Azure
Cloud or on-premise	Both - Some organizations do not want to expose LDAP to the internet so they choose on-premise. Read how <a href="#">LDAP s in the cloud is secure</a> .	Both - Primarily used for cloud tenants who do not want to expose their LDAP directly to the internet	Both - provides a simple and secure way to access identity management (azure AD) in the cloud
Are Users/Roles automatically synchronized with your Live Forms tenant(s) ?	Yes - Manual user/role sync (via frevvo csv upload for example) is not required. The frevvo server automatically gets users & roles from LDAP.	No - if "auth only" mode selected - Users/Roles must be created in your tenant manually. The <a href="#">CSV upload</a> is a good way to do this.  Partial sync if discovery mode ("auth only" off). User details and user's roles are automatically discovered each time the user logs into the tenant. Thus the tenant can get out of sync with your IDP therefore manual or automated csv uploads on a regular basis are still recommended.	Yes - Manual user/role sync (via frevvo csv upload for example) is not required. The frevvo server automatically gets users & roles from Azure AD.
Single Sign On	Cloud - not available  In-house - Must configure IIS using the <a href="#">IIS to Tomcat Connector</a>	Yes	Yes
Authentication Only Mode Choice	No - You must change your IDP (LDAP in this case) to have roles you need in your frevvo workflow if they do not already exist. All user information is maintained in LDAP	Yes	Yes
Authentication Only = Yes	Not Supported	SAML handles authentication only - roles/users managed & maintained via the tenant Users/Roles UI.  Changes made via the tenant Users/Roles UI do not get overridden when user logs in/out.  You may choose this mode if: <ul style="list-style-type: none"> <li>You do not want to add Live Forms roles to your LDAP.</li> <li>LDAP has many roles that have no relevance to your workflow.</li> <li>Find the SAML mapping for the other required attributes complex. For some IDPs, retrieving the manager user id and role names may require writing custom rules.</li> </ul> Con - (1) All user information (email address) must be managed by the frevvo tenant admin. This can get out of sync with your IDP.  <div style="border: 1px solid orange; padding: 5px; text-align: center;"> <p>You cannot pull custom attributes from your AD into your forms/flows in this mode.</p> </div> Pro - You can add roles for frevvo workflow without having to edit your IDP	Users and roles are defined in Azure AD.

Authentication Only = No	<p>This is the only mode allowed in this SM and this property does not even exist to change it.</p> <p>Groups needed for these user types in your IDP:</p> <ul style="list-style-type: none"> <li>• Designer users must be members of the frevvo.Designer group</li> <li>• Tenant Admins must be members of the frevvo.TenantAdmin group</li> </ul> <p>Users are discovered immediately the first time the tenant connects to the IDP and are automatically and always kept in sync without any manual intervention.</p>	<p>Groups needed for these user types in your IDP:</p> <ul style="list-style-type: none"> <li>• All Users that will have access to Live Forms must be members of the frevvo.user group.</li> <li>• Designer users must be members of the frevvo.user and frevvo.Designer groups</li> <li>• Tenant Admins must be members of the frevvo.User and frevvo.TenantAdmin groups</li> </ul> <p>Users discovered when they log in.</p> <p>Changes made via the the tenant Users/Roles UI are overwritten if user logs out then in again.</p>	Users and roles are defined in Azure AD.
If your company uses LDAP as your IDP, do you need to install additional software to use this frevvo Security Manager?	No	Yes - (Either install one of the SAML 2.0 Implementations such as ADFS or use a cloud provider such as Okta, and configure it to talk to your LDAP server)	Yes (You must purchase Azure AD in the cloud)
Can I embed frevvo forms/flows into my website with this Security Manager?	Yes	<p>Yes - if the visibility of the form is <a href="#">set to Anyone (login not required)</a></p> <p>Yes - if the visibility of the form is <a href="#">set to Authenticated Users (login required)</a> and the user is already authenticated to SAML</p> <p>No - if the visibility of the form is <a href="#">set to Authenticated Users (login required)</a> and the user is NOT already authenticated to SAML. This is because frevvo must direct the user to the IDP login screen and the browser will not allow loading the IDP login page in frevvo's form iframe.</p>	<p>Yes - if the visibility of the form is <a href="#">set to Anyone (login not required)</a></p> <p>Yes - if the visibility of the form is <a href="#">set to Authenticated Users (login required)</a> and the user is already authenticated to SAML</p> <p>No - if the visibility of the form is <a href="#">set to Authenticated Users (login required)</a> and the user is NOT already authenticated to SAML. This is because frevvo must direct the user to the IDP login screen and the browser will not allow loading the IDP login page in frevvo's form iframe.</p>
What does frevvo support?	Microsoft AD, Open LDAP	Shibboleth, ADFS, Okta, Centrify, Google and any other software that implements the SAML 2.0 protocol	There is no other implementation of Azure AD then Azure AD
What does frevvo certify?	Microsoft AD	none	Azure AD
Do you need your own Configuration Specialist for your IDP	Yes	Yes	Yes

## Changing the Security Manager for your Tenant

Live Forms trial tenants are configured with the default security manager. Once you have purchased a license for your Live Forms tenant the original security manager can be changed. This allows you to keep the submissions and the name of your existing tenant.

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

Cloud customers, planning to switch the Security Manager of your tenant from the default to the LDAP, SAML or Azure SAML Security Managers or a tenant using the SAML security manager on a trial basis should contact [sales@frevvo.com](mailto:sales@frevvo.com) to initiate the process.

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:

- **Make sure the users created in the Default Security Manager tenant have the same user names as the users in your Active Directory or IDP.**
- **Download the Applications/Forms/Flows that you want to preserve to your desktop as a backup BEORE 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.