**IAM Cloud Onboarding Form**

**STAGE 1 – INFORMATION GATHERING**

To allow us to customise your instance of IAM Cloud, please provide or action the following:



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| **Action** | **Specifications/Completed** |
| Access to [IAM Cloud TeamViewer](https://get.teamviewer.com/iamcloud)   * Please make sure you are using version 10. * The engineer will need TeamViewer access to your primary AD in order to install our SPS software. * This will NOT work on a read only machine. |  |
| Allow outbound traffic through firewall on ports 1268 &1433 |  |
| What is your Active Directory FQDN and NetBIOS ? |  |
| What is your preferred log in requirements (UPN or email?) |  |
| Provide us with an Office 365 global admin account   * This needs to be 'in cloud' with an onmicrosoft.com email address, this grants us permission to provision users into your Office 365 tenancy. * Many customers create a new one just for IAM Cloud. |  |
| Which domains would you like to federate? |  |
| What Classifications do you require?   * Classifications are what defines an account to be synced to IAM Cloud. We assign permissions, restrictions, etc based on classifications. We can classify on most attributes the users have on your AD, including which OU the user is in. * Examples of classifications are: Employees, Staff, Students, HR, Administration etc |  |
| Preferred smart link configurations   * Please see [here](https://iamcloud.freshdesk.com/support/solutions/articles/12000000224-what-are-smartlinks-) for further details on how you set up Smartlinks |  |
| Preferred de-provisioning rules   * Please let us know how you want us to handle users that you delete from your AD. We can delete them from our systems, immediately freeing up the license and deleting all their O365 files and emails, OR we can leave them on our system, but deactivated (they won't be able to log in). This will preserve their O365 files and emails until the object is deleted from our systems, but can also cause issues with new accounts that have the same unique information as the deactivated user (like an email address). |  |
| Licensing requirements   * You can handle all licensing internally OR we can apply a default license for new users. |  |





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| **Action** | **Specifications/Completed** |
| Preference of syncing contacts, security groups, and distribution groups   * If you would like to sync any of the above, we will need the OU location of each of these (or whichever you would like to sync). |  |
| Which Applications are you planning to federate with us?   * You can federate up to 5 applications on the base plan or an unlimited on the Advanced Plan. |  |
| Configure [Group Policies to allow Single](https://support.iamcloud.com/solution/articles/12000046385-group-policy-for-single-sign-on) Sign On   * Instructions can be found in the article [Configuring Group Policies for SSO](https://support.iamcloud.com/support/solutions/articles/12000037464-how-to-change-group-policy-for-single-sign-on) |  |
| Please provide us with a test account |  |
| Access to the [IAM Cloud Admin Portal](file:///C:\Users\victoria\Downloads\portal.iamcloud.net)   * Please let us know who you would like to have Admin access to the Admin portal. The access will be granted only once the onboard is completed. For details on what Admins can access please visit [here.](https://support.iamcloud.com/solution/articles/12000016915-iam-cloud-admin-portal-access-for-each-tenancy-role) |  |
| Access to the [IAM Cloud Support Portal](https://support.iamcloud.com/helpdesk)   * Please let us know who you would like be able to access the support portal and log support tickets. |  |

If you are unsure or need assistance please do not hesitate to contact the IAM Cloud Technical Support Team who will be happy to answer any questions.

Contacting the IAM Cloud Technical Support

Log a Support Ticket at [http://support.iamcloud.com](http://support.iamcloud.com/)

Email us at [support@iamcloud.com](mailto:support@iamcloud.com)

Phone us: (UK): +44 118 324 0000

Phone us: (US): +1 914 495 1298