Liferay®

Learning Paths - Level 01

# Identity Management & SSO

#LIFERAY**ENABLEMENT**

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*Some features may not be available in earlier releases.*

# Session Breakdown

| | | |
|---|---|---|
| 5 min | 01 | Introduction and Session Scope |
| 5 min | 02 | Identity Management & SSO Overview |
| 10 min | 03 | Managing Employee Access |
| 5 min | 04 | Managing Business Partner Access |
| 10 min | 05 | Managing Guest Access |

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Part 01

# Introduction and Session Scope

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What do we mean by *Identity Management* and *Single Sign On?*

# Introduction to Identity Management

- Identity Management (IdM) ensures the right people have access to the right resources
- Single Sign On (SSO) is an authentication scheme that allows users to log in to multiple resources with the same credentials
- Liferay provides robust IdM and SSO capabilities out of the box
- Liferay also provides integration with industry leading providers
- Liferay supports a mix of different IdM and SSO services to support diverse audiences

What we are planning to cover in this session

# Session Scope

- Understand the difference between authentication and authorization
- Examine some common identity management use cases
- Highlight general best practices in identity management and implementing them in Liferay
- Use Clarity as a use case for leveraging external identity management and single sign on solution

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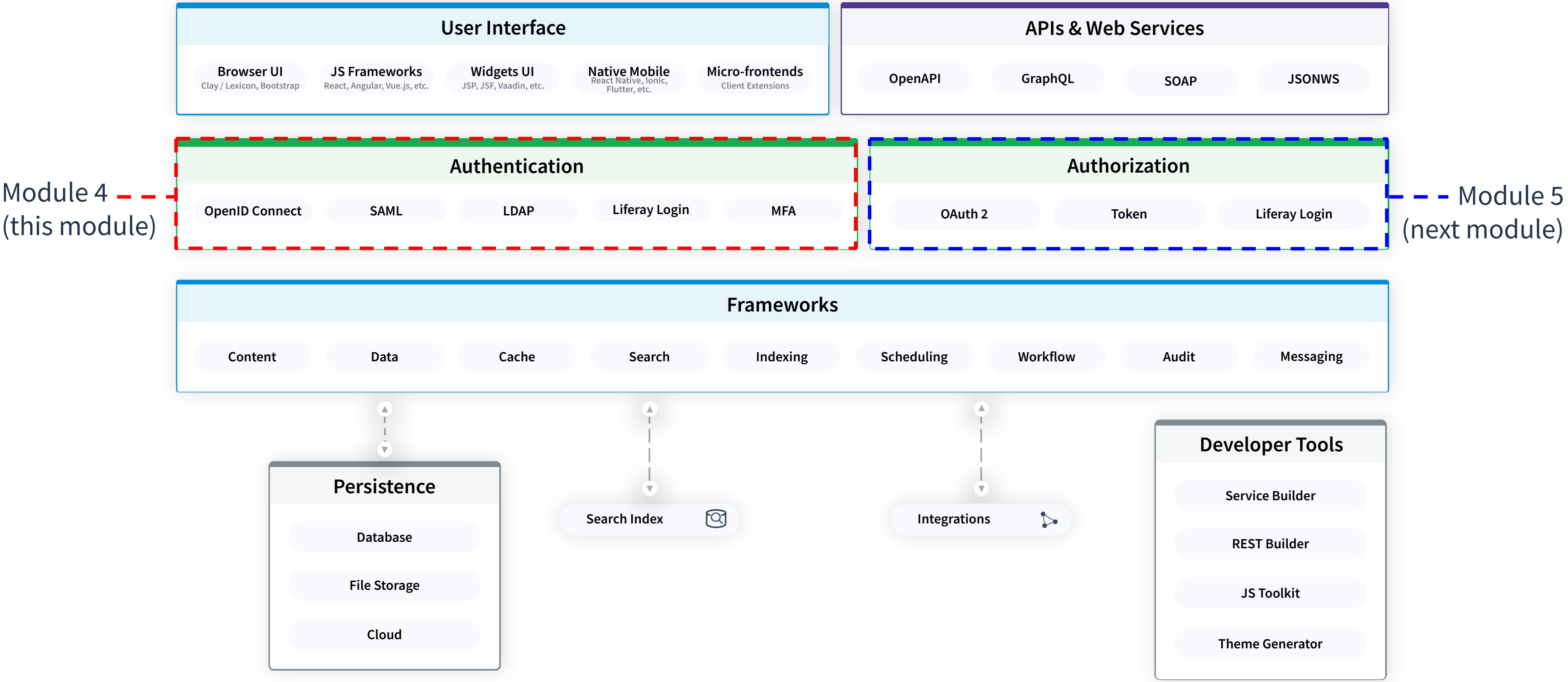
Part 02

# Identity Management & SSO Overview

## Authentication

## VS

## Authorization



## User Interface

- Browser UI — Clay / Lexicon, Bootstrap
- JS Frameworks — React, Angular, Vue.js, etc.
- Widgets UI — JSP, JSF, Vaadin, etc.
- Native Mobile — React Native, Ionic, Flutter, etc.
- Micro-frontends — Client Extensions

## APIs & Web Services

- OpenAPI
- GraphQL
- SOAP
- JSONWS

Module 4 (this module)

## Authentication

- OpenID Connect
- SAML
- LDAP
- Liferay Login
- MFA

## Authorization

- OAuth 2
- Token
- Liferay Login

Module 5 (next module)

## Frameworks

- Content
- Data
- Cache
- Search
- Indexing
- Scheduling
- Workflow
- Audit
- Messaging

## Persistence

- Database
- File Storage
- Cloud

Search Index

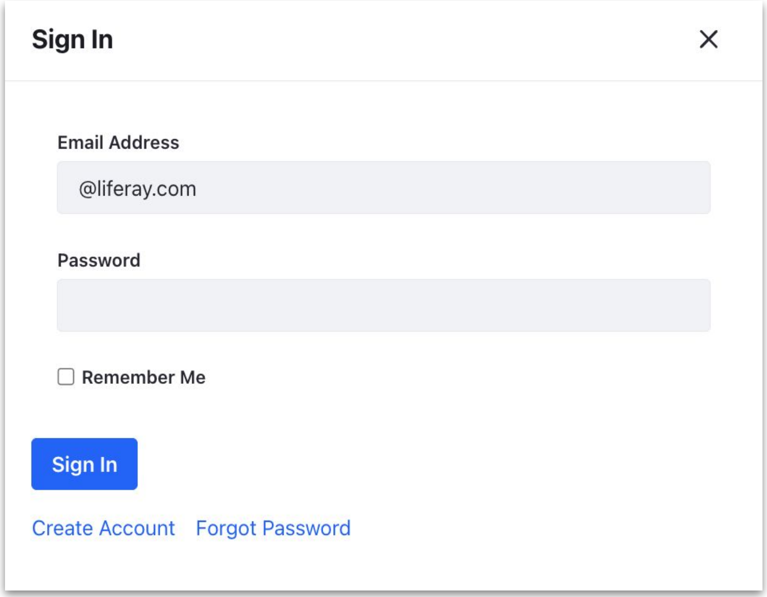
Integrations

## Developer Tools

- Service Builder
- REST Builder
- JS Toolkit
- Theme Generator

# Initial Portal Login

- Default Sign In Widget
- User credentials stored in Liferay Database
- Initial credentials for Liferay SaaS shared during provisioning process
- Initial credentials for Self-Hosted and Liferay PaaS:
  - Email Address: *test@liferay.com*
  - Password: *test*



Sign In

Email Address

@liferay.com

Password

□ Remember Me

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Identity Management Basics

# OpenID Connect

- Standards-based protocol allowing user to authenticate using existing credentials
- Example providers include Google, Facebook, Microsoft, Apple, GitHub, etc.
- Removes need for custom development

Identity Management Basics

# SAML / SSO / IDMS

- Security Assertion Markup Language (SAML) is an open-standard used for authentication
- Identity Provider (IdP) contains users & credentials
- Service Provider (SP) is the application being authenticated to
- Frequently used to support Single Sign-On (SSO)
- Usually used with an Identity Management System (IDMS)

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Identity Management

# Liferay DXP Key Capabilities - Security

## LDAP Directories

- Apache Directory
- Microsoft Active Directory
- Novell eDirectory
- OpenLDAP http://www.OpenLDAP.org

## SAML Implementations

- Microsoft Active Directory Federation Services
- OpenAM
- SiteMinder
- Shibboleth
- PingFederate

## SSO Implementations

- SAML v2.0 Security Assertion Markup Language
- f
- OpenAM
- OpenID
- ORACLE Oracle Identity and Access Management
- SiteMinder

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Part 03

# Managing Clarity Employees

Benchmarking and measuring the success of outcomes

# Clarity's Critical Success Factors

✓ 1. Non-technical participation
✓ 2. Simplified maintenance (and evolution)
✓ 3. Future proofed and flexible
✓ 4. Increase engagement and user experience through personalization
✓ 5. Risk mitigation with better governance
✓ 6. Lower investment / total cost of ownership

Identity Management

# Clarity Business Requirements

- Provide secure access for Content Managers and System Administrators
- Leverage existing Identity Management and Single Sign-On Solution
- Ensure employee information stays up-to-date

Identity Management and Single Sign On

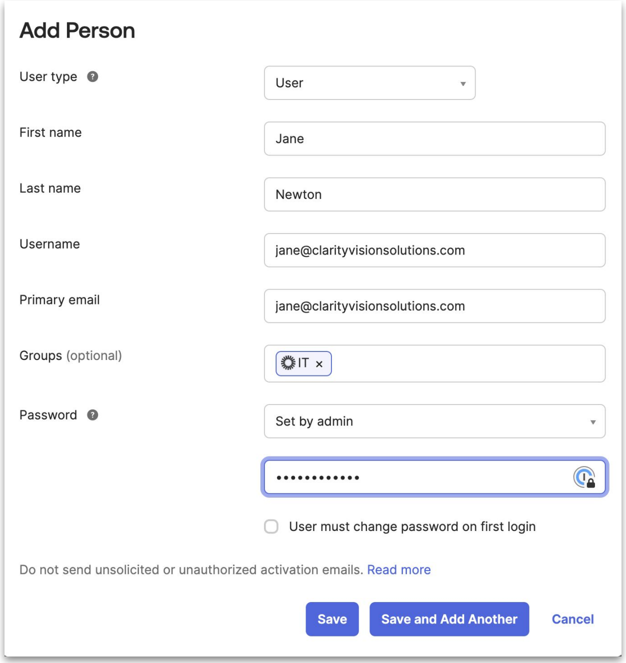
# Okta for Authentication and SSO

- Clarity uses Okta for Identity Management
- Okta provides SAML support for SSO
- Okta will act as the Identity Provider (IdP)
- Liferay will as the Service Provider (SP)
- Using external authentication is generally regarded as a best practice

Identity Management and Single Sign On

# Okta for Authentication and SSO

- Okta Sandbox has been already configured
- Clarity users created
  - Password: *LiferayLearn*
- User Groups already created



## Add Person

| | |
|---|---|
| User type | User |
| First name | Jane |
| Last name | Newton |
| Username | jane@clarityvisionsolutions.com |
| Primary email | jane@clarityvisionsolutions.com |
| Groups (optional) | IT × |
| Password | Set by admin |
| | ••••••••••••• |

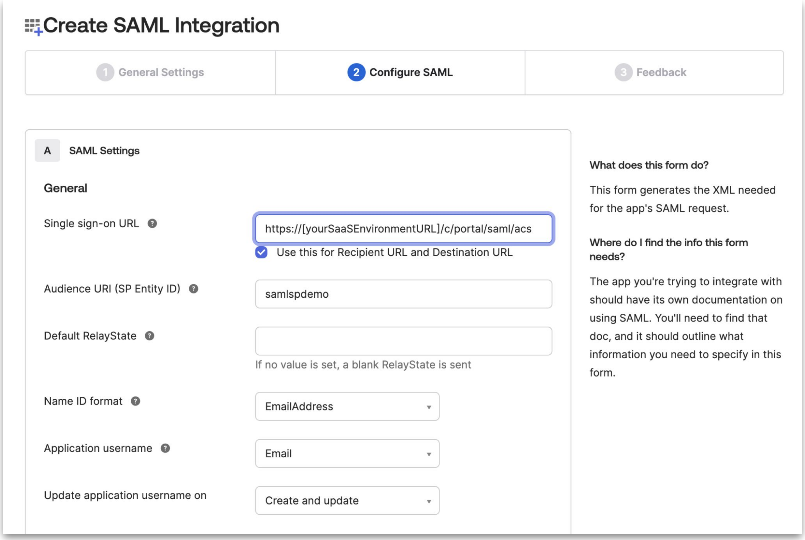
□ User must change password on first login

Do not send unsolicited or unauthorized activation emails. Read more

Identity Management and Single Sign On

# Okta for Authentication and SSO

- SAML 2.0 Application created
  - Single sign-on URL: http://[your_lifray_saas_environment]/c/portal/saml/acs
  - Audience URI (SP Entity ID): samlspdemo
  - Name ID format: EmailAddress
  - Application username: Email



Create SAML Integration

A SAML Settings

General

Single sign-on URL: https://[yourSaaSEnvironmentURL]/c/portal/saml/acs

☑ Use this for Recipient URL and Destination URL

Audience URI (SP Entity ID): samlspdemo

Default RelayState:

If no value is set, a blank RelayState is sent

Name ID format: EmailAddress

Application username: Email

Update application username on: Create and update

What does this form do?

This form generates the XML needed for the app's SAML request.

Where do I find the info this form needs?

The app you're trying to integrate with should have its own documentation on using SAML. You'll need to find that doc, and it should outline what information you need to specify in this form.

# Demo – Configuring an External Authentication with Liferay

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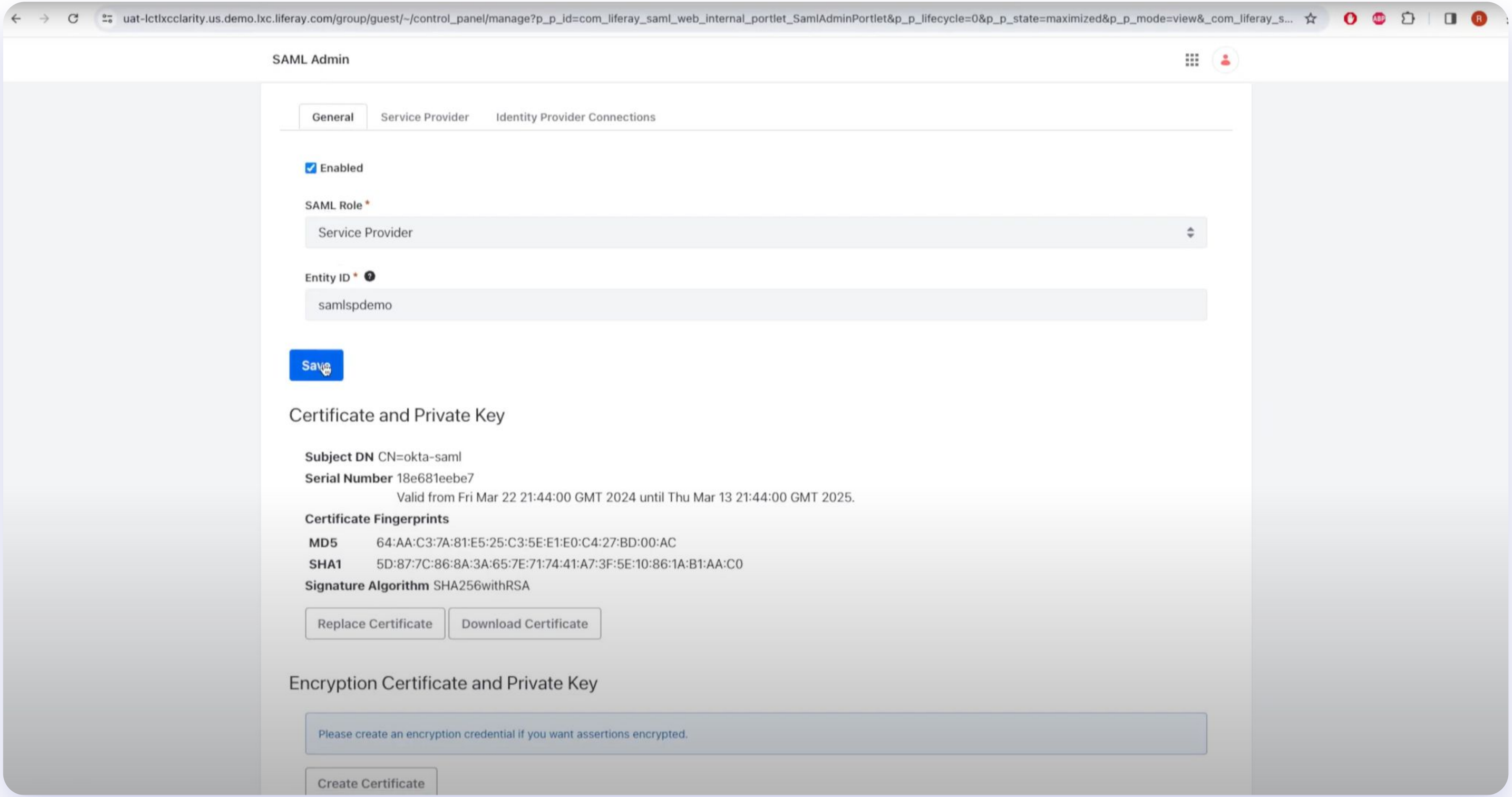

uat-lctlxcclarity.us.demo.lxc.liferay.com/group/guest/~/control_panel/manage?p_p_id=com_liferay_saml_web_internal_portlet_SamlAdminPortlet&p_p_lifecycle=0&p_p_state=maximized&p_p_mode=view&_com_liferay_s...

SAML Admin

☑ Enabled

SAML Role *: Service Provider

Entity ID *: samlspdemo

## Certificate and Private Key

**Subject DN** CN=okta-saml

**Serial Number** 18e681eebe7

Valid from Fri Mar 22 21:44:00 GMT 2024 until Thu Mar 13 21:44:00 GMT 2025.

**Certificate Fingerprints**

| | |
|---|---|
| **MD5** | 64:AA:C3:7A:81:E5:25:C3:5E:E1:E0:C4:27:BD:00:AC |
| **SHA1** | 5D:87:7C:86:8A:3A:65:7E:71:74:41:A7:3F:5E:10:86:1A:B1:AA:C0 |

**Signature Algorithm** SHA256withRSA

## Encryption Certificate and Private Key

Please create an encryption credential if you want assertions encrypted.

Part 04

# Managing Business Partner Access

Benchmarking and measuring the success of outcomes

# Clarity’s Critical Success Factors

✓ 1. Non-technical participation

✓ 2. Simplified maintenance (and evolution)

✓ 3. Future proofed and flexible

✓ 4. Increase engagement and user experience through personalization

✓ 5. Risk mitigation with better governance

✓ 6. Lower investment / total cost of ownership

Identity Management

# Clarity Business Requirements

- Provide secure access for business partners
- Segment business partners based on type and industry
- Maintain performance

**Liferay Authentication**

**VS**

**External Authentication**

Identity Management and Single Sign On

# Okta for Authentication and SSO

- Leverage existing Okta setup
- Additional external users have already been configured in Okta
- Additional external groups have already been configured in Okta

Part 05

# Managing Guest Access

Benchmarking and measuring the success of outcomes

# Clarity’s Critical Success Factors

✓ 1. Non-technical participation

2. Simplified maintenance (and evolution)

3. Future proofed and flexible

✓ 4. Increase engagement and user experience through personalization

5. Risk mitigation with better governance

✓ 6. Lower investment / total cost of ownership

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Managing Guest Access

# Clarity Business Requirements

- Track all website visitors
- Segment all website visitors
- Provide reporting capabilities

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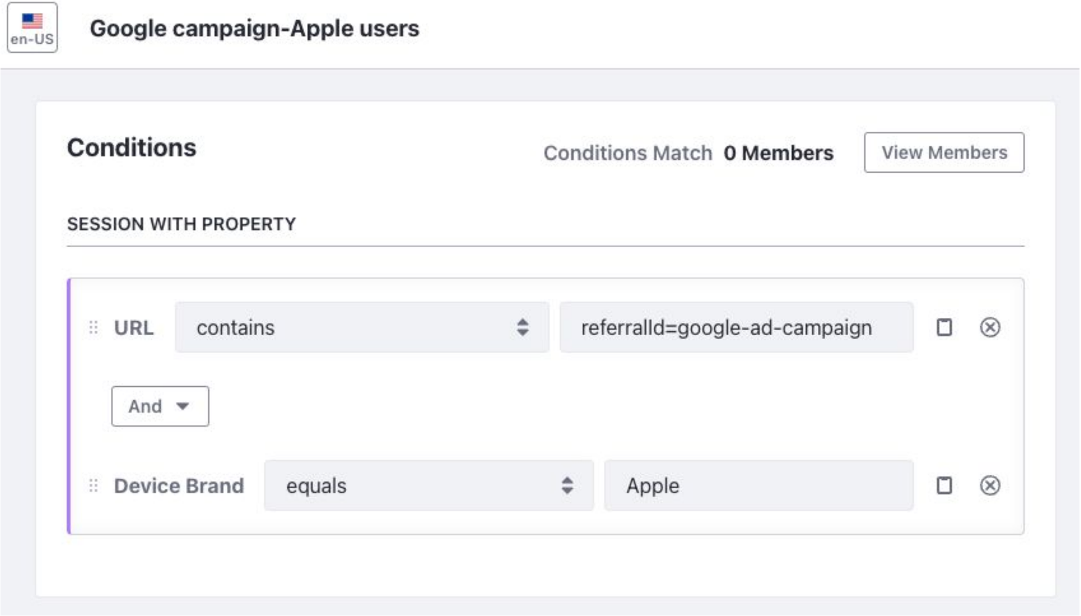
Tracking Anonymous User Interaction with Segments

# User Segmentation

- **User segments** aggregate individuals based on common attributes and behavior
- Configure various user segments to track traffic from different sources (i.e. campaigns, referrals) or audiences, (i.e. by geography, IP address)
- User segmentation can be leveraged to customize experiences for various audiences



en-US

Google campaign-Apple users

Conditions

Conditions Match **0 Members**

SESSION WITH PROPERTY

URL contains referralId=google-ad-campaign

And

Device Brand equals Apple

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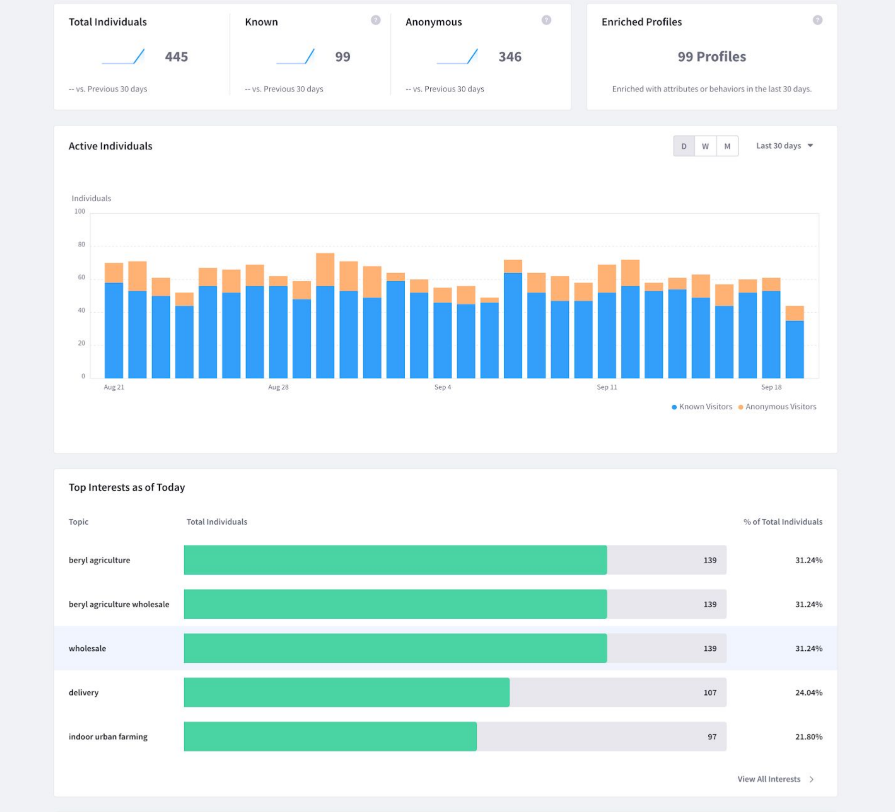
## Using Analytics Cloud to Discover Guest Behavior

# Liferay Analytics

- Analytics Cloud reports on user properties and behavior, including visitors, most viewed pages, source of traffic, popular search terms and interest topics, visitor location, browser type, returning visitors, and more
- Analytics Cloud displays results for both authenticated and unauthenticated [guest] users
- Insights from Analytics Cloud can be leveraged to refine and customize guest experiences



Total Individuals 445 -- vs. Previous 30 days

Known 99 -- vs. Previous 30 days

Anonymous 346 -- vs. Previous 30 days

Enriched Profiles

99 Profiles

Enriched with attributes or behaviors in the last 30 days.

Active Individuals

D W M Last 30 days

Top Interests as of Today

| Topic | Total Individuals | % of Total Individuals |
|---|---|---|
| beryl agriculture | 139 | 31.24% |
| beryl agriculture wholesale | 139 | 31.24% |
| wholesale | 139 | 31.24% |
| delivery | 107 | 24.04% |
| indoor urban farming | 97 | 21.80% |

View All Interests >

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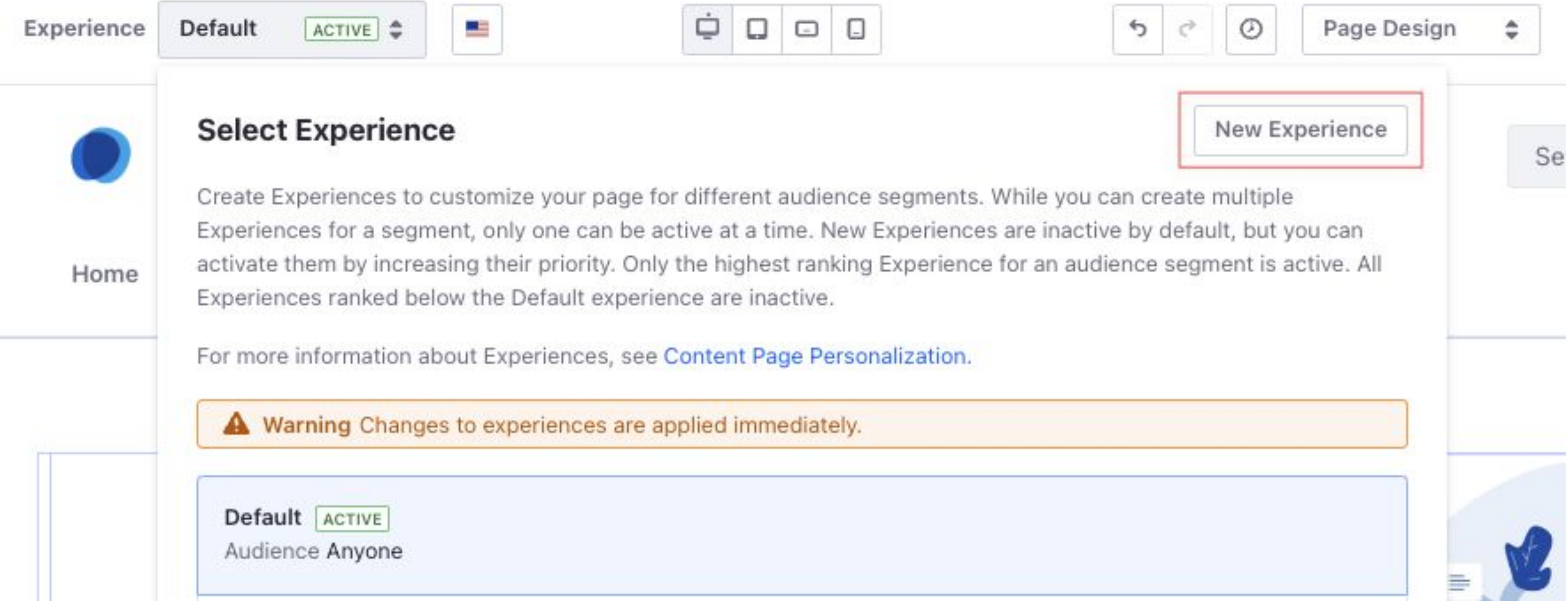
Managing Guest Access

# Anonymous User Experiences



## Select Experience

Create Experiences to customize your page for different audience segments. While you can create multiple Experiences for a segment, only one can be active at a time. New Experiences are inactive by default, but you can activate them by increasing their priority. Only the highest ranking Experience for an audience segment is active. All Experiences ranked below the Default experience are inactive.

For more information about Experiences, see Content Page Personalization.

⚠ **Warning** Changes to experiences are applied immediately.

**Default** ACTIVE
Audience Anyone

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Flexibility, security, and not a drop of complexity, Liferay’s got your identity covered.

Thank you

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