RSA SECURID® ACCESS
Implementation Guide

Insightly

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Last Modified: January 30, 2018

Solution Summary

Insightly, Inc. is a private multinational computer technology company headquartered in San Francisco, California. The company develops cloud-based customer relationship management (CRM) and project management tools for small and medium size businesses. Insightly distributes its CRM and project management tools to customers using a freemium method.

RSA SecurID Access Features	
Insightly	
On Premise Methods	
RSA SecurID	✓
On Demand Authentication	✓
Risk-Based Authentication (AM)	-
Cloud Authentication Service Methods	
Authenticate App	✓
FIDO Token	✓
SSO	
SAML SSO	✓
HFED SSO	-

Identity Assurance	
Collect Device Assurance and User Behavior	✓

Configuration Summary

All of the supported use cases of RSA SecurID Access with Insightly require both server-side and client-side configuration changes. This section of the guide includes links to the appropriate sections for configuring both sides for each use case.

RSA Cloud Authentication Service – Insightly can be integrated with RSA Cloud Authentication Service in the following way:

SAML via RSA Identity Router (IdP)

Cloud Authentication Service – Identity Router IdP Configuration
Insightly SAML Configuration

RSA SecurID Access Server Side Configuration

RSA Cloud Authentication Service Configuration

SAML via RSA Identity Router (IdP)

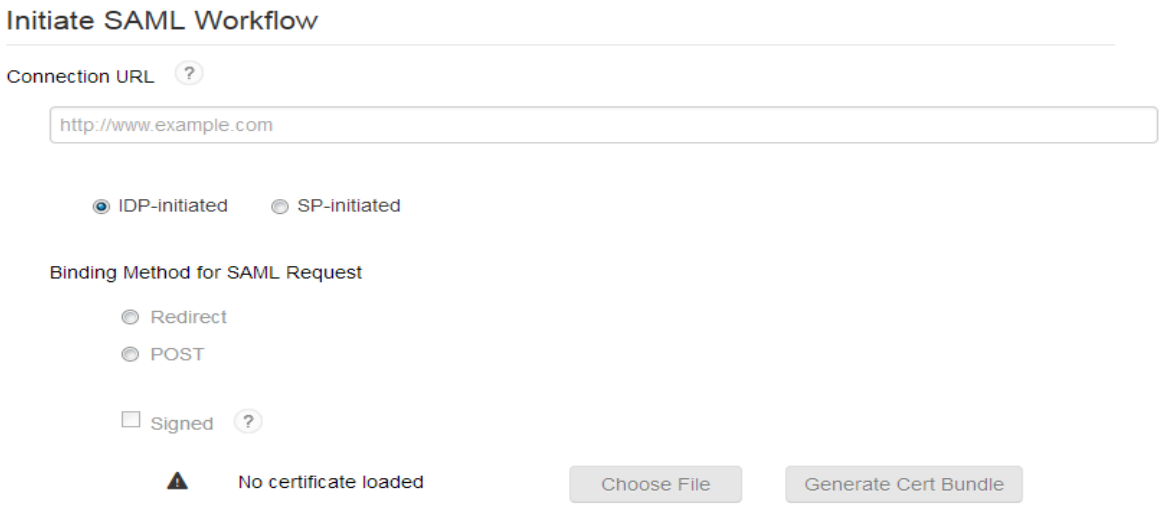
To configure a SAML Service Provider in RSA Identity Router, you must deploy the connector for Insightly in the RSA SecurID Access Console. During configuration of the IdP you will need some information from the SP. This information includes (but is not limited to) Assertion Consumer Service URL and Service Provider Entity ID.

Configure RSA Identity Router SAML IdP

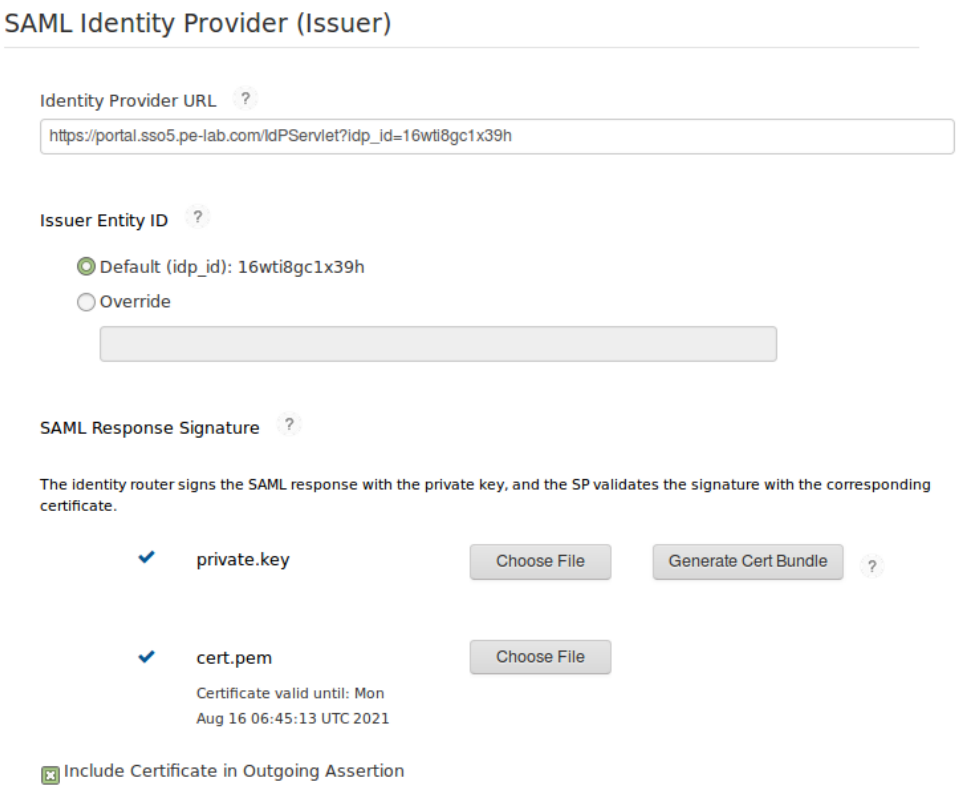
Procedure

1. Logon to the RSA SecurID Access console and browse to **Applications > Application Catalog**, search for Insightly and click **+Add** to add the connector.

2. Enter a name for the application in the **Name** field on the Basic Information page and click the **Next Step** button.
3. Navigate to Initiate SAML Workflow section and choose **IDP-initiated.**



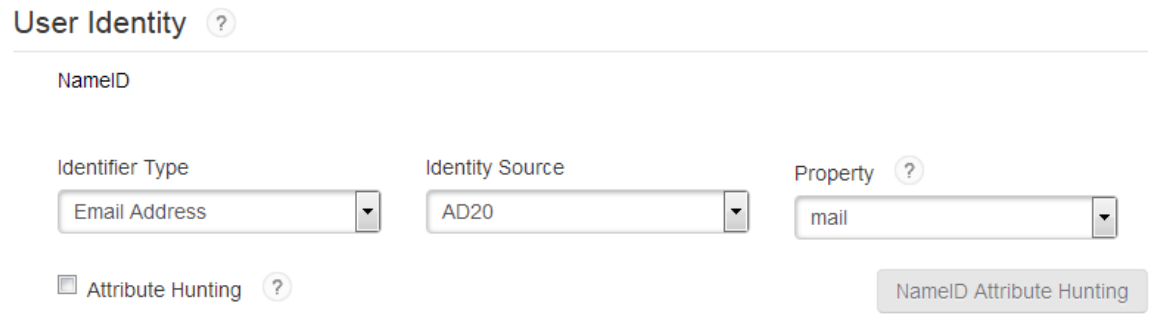
4. Scroll down to SAML Identity Provider (Issuer) section.



   a. Take note of the Identity Provider URL.
   b. Take note of the Issuer Entity ID.
   c. Select **Choose File** and upload the private key.
   d. Select **Choose File** to import the public signing certificate.
   e. Select the checkbox for **Include Certificate in Outgoing Assertion**.

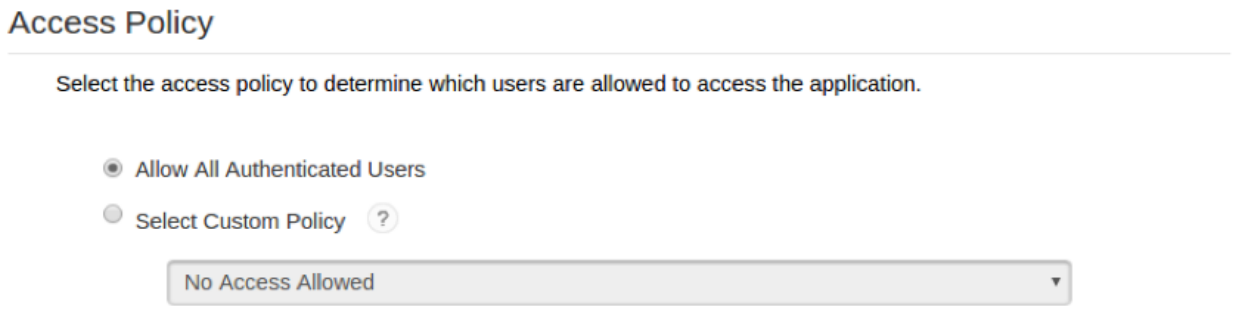
5. Scroll down to the **Service Provider** section.

6. In the Assertion Consumer Service (ACS) URL field, replace **<InstanceID>** with your company's InstanceID.
7. In the Audience (Service Provider Issuer ID) field, replace **<InstanceID>** with your company's InstanceID.
8. Scroll down to the **User Identity** section. Verify the settings are correct for your environment. In this example the username to be presented in email format and the user account will be validated against the User Store selected.

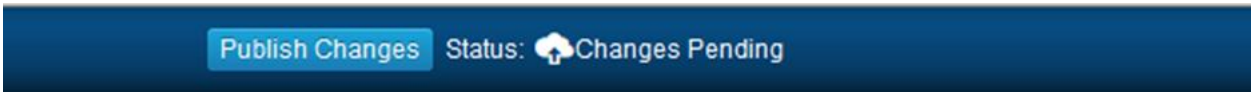


9. Click **Next Step**.

10. On the User Access page, select **Allow All Authenticated Users** user policy from the available options.



11. Click **Next Step**.
12. On the Portal Display page, select **Display in Portal**.
13. Click **Save and Finish**.
14. Click **Publish Changes**. Your application is now enabled for SSO.



15. Navigate to **Applications** > **My Applications**.
16. Locate **Insightly** in the list and from the **Edit** option, select **Export Metadata**.

Before You Begin

This section provides instructions for configuring Insightly with RSA SecurID Access. This document is not intended to suggest optimum installations or configurations.

It is assumed that the reader has both working knowledge of all products involved, and the ability to perform the tasks outlined in this section. Administrators should have access to the product documentation for all products in order to install the required components.

All Insightly components must be installed and working prior to the integration. Perform the necessary tests to confirm that this is true before proceeding.

Insightly SAML Configuration

Procedure

1. Log into your Insightly application web account as company administrator. **https://crm.na1.insightly.com/User/Login**
2. To enable SAML, go to **System Settings > SAML Single Sign-On**.
3. Check **Enable SAML Sign-on**.
4. Upload the certificate or XML **metadata file**. If you have both, you only need to upload one.