

IAM and Authentication

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Setting Up Secure Access

Before inviting your team, configure authentication and permissions properly. This notebook covers SAML/SSO setup, API tokens, and the modern permission model.

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Prerequisites

- Account owner or admin access
- Identity provider details (for SSO)
- Understanding of your organization's access requirements

1. Why IAM First?

Setting up IAM before deploying OneAgent or inviting users ensures:

Benefit	Why It Matters
Consistent access	Users authenticate the same way from day one
Proper permissions	No accidental admin access for viewers
Audit trail	All access tied to corporate identity
Offboarding	Disabling IdP account revokes Dynatrace access
Compliance	Meet security requirements from the start

! [Recommended Onboarding Order]

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Step 1: Access Account Management

****Location:**** Account Management → Identity & access management → Single sign-on

You'll need these values for your IdP configuration:

Field	Description
----- -----	
Entity ID	Unique identifier for Dynatrace
ACS URL	Assertion Consumer Service URL
Relay State	Where users land after login

Step 2: Configure Your Identity Provider

In your IdP, create a new SAML application with:

1. ****ACS URL**** from Dynatrace
2. ****Entity ID**** from Dynatrace
3. ****Name ID Format:**** Email address (recommended)
4. ****Required Attributes:****
 - `email` - User's email address
 - `firstName` - User's first name
 - `lastName` - User's last name

Step 3: Configure Dynatrace

****Location:**** Account Management → Identity & access management → Single sign-on

1. Upload or paste the IdP metadata XML
2. Or manually configure:
 - ****IdP Entity ID**** - From your IdP
 - ****SSO URL**** - Login endpoint
 - ****Certificate**** - IdP signing certificate
3. Configure attribute mappings
4. Save and test

Step 4: Test SSO

Before enabling SSO for all users:

1. Open an incognito/private browser window
2. Navigate to your tenant URL (`https://{tenant-id}.apps.dynatrace.com`)
3. Select "Sign in with SSO"
4. Complete IdP authentication
5. Verify you land in Dynatrace with correct permissions

> ****Warning:**** Keep at least one local admin account as a break-glass option in case SSO fails.

( iIHZpZXdB3g9IjAgMCA3MDAgMjgwIj4KICA8ZGVmcz4KICAgIDxsaW5lYXJHcmFkaWVudCBpZD0 iYWRTaW5HcmFkIiB4MT0iMCUiIHkxPSIwJSIgeDI9IjEwMCUiiHkyPSIxMDAlIj4KICAgICAgPHN0 b3Agb2Zmc2V0PSIwJSIgc3R5bGU9InN0b3AtY29sb3I6I2VmNDQ0NDtздG9wLW9wYWNPdHk6MSIg Lz4KICAgICAgPHN0b3Agb2Zmc2V0PSIxMDAlIiBzdHlsZT0ic3RvcC1jb2xvcjojZGMYNjI2O3N0b3 Atb3BhY2l0eToxiAvPgogICAgPC9saW5lYXJHcmFkaWVudD4KICAgIDxsaW5lYXJHcmFkaWVudCB pZD0iY29uZmlnR3JhZCIgeDE9IjAlIiB5MT0iMCUiIHgyPSIxMDAlIiB5Mj0iMTAwJSI+CIAgICAg IDxzdG9wIG9mZnNldD0iMCUiIHNoewxLP SJzdG9wLWNvbG9y0iNmNTLMGI7c3RvcC1vcGFjaXR50 jEiIC8+CIAgICAgIDxzdG9wIG9mZnNldD0iMTAwJSIgc3R5bGU9InN0b3AtY29sb3I6I2Q5NzcwNj tzdG9wLW9wYWNPdHk6MSIgLn4KICAgIDwvbgLuZWFrY3JhZGlbnQ+CIAgICA8bGluZWFrY3JhZGl bnQgaWQ9Im9wZXJhdG9yR3JhZCIgeDE9IjAlIiB5MT0iMCUiIHgyPSIxMDAlIiB5Mj0iMTAwJSI+ CIAgICAgIDxzdG9wIG9mZnNldD0iMCUiIHNoewxLP SJzdG9wLWNvbG9y0imZYjgyZjY7c3RvcC1vc GFjaXR50jEiIC8+CIAgICAgIDxzdG9wIG9mZnNldD0iMTAwJSIgc3R5bGU9InN0b3AtY29sb3I6Iz I1NjNlYjtzdG9wLW9wYWNPdHk6MSIgLn4KICAgIDwvbgLuZWFrY3JhZGlbnQ+CIAgICA8bGluZWFr Y3JhZGlbnQgaWQ9InZpZXdlckdyYWQiIHgxPSIwJSIgeTE9IjAlIiB4Mj0iMTAwJSIgeTI9IjEw MCUiPgogICAgICA8c3RvcCBvZmZzZXQ9IjAlIiBzdHlsZT0ic3RvcC1jb2xvcjojMTBiTGx03N0b 3Atb3BhY2l0eToxiAvPgogICAgICA8c3RvcCBvZmZzZXQ9IjEwMCUiiHN0ewxLP SJzdG9wLWNvbG 9y0iMwNTk2Njk7c3RvcC1vcGFjaXR50jEiIC8+CIAgICA8L2xpbmVhckdyYWRpZW50PgogICAgPGZ pbHRlc iBpZD0icGVybVN0YWRvdyI+CIAgICAgIDxmZURyb3BTaGFkb3cgZHg9IjEiIGR5PSIxIiBz dGREZXZpYXRpb249IjIiIGZsb29kLW9wYWNPdHk9IjAuMTUuIl4KICAgIDwvZmlsdGVyPgogIDwvZ Gvmcz4KCIAgPCEtLSBCYWNrZ3JvdW5kIC0tPgogIDxyZWNOIHdpZHRoPSI3MDAiIGhlawdodD0iMj gwIiBmaWxsPSIjZjhmOWZhIiByeD0iMTAil4KCIAGPCEtLSBUaXR5ZSAeLT4KICA8dGV4dCB4PSI zNTAiIHk9IjI4IiBmb250LWZhbWlseT0iQXJpYWwsIHNhbnMt c2VyawYiIGZvbnQt c2l6ZT0iMTgiIGZvbnQt d2VpZ2h0PSJib2xkiBmaWxsPSIJmzMzIiB0ZXh0LWFuY2hvcj0ibWlkZGxlIj5QZXJta XNzaW9uIEhpZXJhcmNoeTwvdGV4dD4KICA8dGV4dCB4PSIzNTAiIHk9IjQ4IiBmb250LWZhbWlseT 0iQXJpYWwsIHNhbnMt c2VyawYiIGZvbnQt c2l6ZT0iMTEiIGZpbGw9Im2NjYiIHRleHQeTW5jaG9 yPSJtaWRkbGUlPlJvbGUtYmFzZWQgYWwjZXNzIGNvb nRyb2wgZnJvbSBoaWdoZXNOIHRvIGxvd2Vz dCBwcml2awxLZ2U8L3RleHQ+CgogIDwhLS0gUGVybwLzc2lvbiBMXZXLbHMgKHNOYWNrZWQpIC0tP gogIDwhLS0gQWRtaW4gL S0+CIAgPHJLY3QgeD0iMTAwIiB5PSI3MCIgd2lkdGg9IjUwMCIgaGVpZ2 h0PSI0NSIgcng9IjgiIGZpbGw9InVybcgjYWRtaW5HcmFkKSIGZmlsdGVyPSJ1cmwoI3Blcm1TaGF kb3cpIi8+CIAgPHRleHQgeD0iMTMiB5PSI5OCIGZm9udC1mYW1pbHk9IkFyaWFsLCBzYW5zLXNL cmllmiBmb250LXNpemU9IjE0IiBmb250LXdlaWdodD0iYm9sZCIgZmlsbD0id2hpdGUlPkFETULOP C90ZXh0PgogIDx0ZXh0IHg9IjI4MCIgeT0iOTgiIGZvbnQtZmFtaWx5PSJBcmllbCBwgc2Fucy1zZX JpZiIgZm9udC1zaXplPSIxMiIgZmlsbD0icmdiYSgyNTUsMjU1LDI1NSwwLjkgIj5GdWxsIGFjY2V zcyBpbmNsdlWRpbmcgdXNlciBtYW5hZ2VtZW50PC90ZXh0PgoKICA8IS0tIENvbmZpZ3VyYXRvc iATLT4KICA8cmVjdCB4PSIxMDAiIHk9IjEyMCIgd2lkdGg9IjUwMCIgaGVpZ2h0PSI0NSIgcng9Ijgi IGZpbGw9InVybcgjY29uZmlnR3JhZCIkIGZpbHRlcj0idXJsKCnWZXJtU2hhZG93KSIvPgogIDx0ZX h0IHg9IjEzMCIgeT0iMTQ4IiBmb250LWZhbWlseT0iQXJpYWwsIHNhbnMt c2VyawYiIGZvbnQt c2l6ZT0iMTQiIGZvbnQt d2VpZ2h0PSJib2xkiBmaWxsPSJ3aGl0ZSI+Q090RklHVVBjBE9SPC90ZXh0

The modern platform uses **policies** to control what users can access:

Policy Type	Purpose
----- -----	
Environment policies	Access to specific environments
Account policies	Account-level management
Data policies	Access to specific data (via segments)

> **Note:** For data filtering, use **Segments** (covered in ONBRD-05) rather than the legacy Management Zones.

5. API Token and OAuth Management

The modern platform supports two authentication methods for API access:

API Tokens (for OneAgent, legacy integrations)

Location: Account Management → Access tokens

Purpose	Required Scopes
----- -----	
OneAgent Deployment	`InstallerDownload`
Metric Ingestion	`metrics.ingest`
Log Ingestion	`logs.ingest`
Read Entities	`entities.read`

OAuth 2.0 Clients (recommended for new integrations)

Location: Account Management → OAuth clients

OAuth 2.0 is the modern authentication method:

1. Create an OAuth client
2. Use client credentials flow to obtain bearer tokens
3. Tokens are short-lived and automatically rotated

Token Best Practices

Practice	Why
----- -----	
Minimal scope	Limit blast radius if compromised
Descriptive names	Know what each token is for
Expiration dates	Force rotation, reduce risk
Separate tokens per use	Revoke one without affecting others
Never commit to code	Use environment variables or secrets managers
Prefer OAuth for new work	Modern, short-lived tokens

Creating an API Token

1. Go to Account Management → Access tokens

2. Click "Generate new token"
3. Enter a descriptive name (e.g., "prod-oneagent-deployment")
4. Select required scopes
5. Set expiration (consider 90–365 days)
6. Click "Generate token"
7. ****Copy the token immediately**** – it won't be shown again

6. Verification Queries

After configuring IAM, verify your setup with these queries.

```
```dql
// Check recent audit log entries for user access
fetch logs, from: now() - 24h
| filter matchesPhrase(log.source, "audit")
| fields timestamp, content
| sort timestamp desc
| limit 50
```

```dql
// Check for authentication events (if audit logs enabled)
fetch logs, from: now() - 7d
| filter matchesPhrase(content, "login") or matchesPhrase(content,
"authentication")
| fields timestamp, content
| sort timestamp desc
| limit 25
```
```

Manual Verification Checklist

| Item | How to Verify |
|--------------------------|-----------------------------------|
| **SSO working** | Login via IdP in incognito window |
| **Groups created** | Check Account Management → Groups |
| **Permissions assigned** | Test with a viewer account |
| **Break-glass account** | Local admin login still works |
| **API tokens** | OneAgent deployment token ready |

7. Next Steps

With IAM configured, you're ready to:

1. ****ONBRD-03: Deploying ActiveGate**** – Set up network routing (if needed for restricted networks)
2. ****ONBRD-04: Deploying OneAgent**** – Start collecting infrastructure data
3. Invite team members via your IdP

4. Create additional API tokens or OAuth clients as needed

IAM Tasks Before Moving On

- [] SAML/SSO configured and tested
- [] Break-glass local admin account documented
- [] User groups created for major roles
- [] OneAgent deployment token generated
- [] Token naming conventions established

Summary

In this notebook, you learned:

- Why IAM should be configured before deploying agents
- Authentication options (Local, SAML, OIDC)
- How to configure SAML SSO
- Permission levels and group structure
- API token and OAuth best practices
- How to verify IAM configuration

References

- [Identity and Access Management] (<https://docs.dynatrace.com/docs/manage/identity-access-management>)
- [SAML Configuration] (<https://docs.dynatrace.com/docs/manage/identity-access-management/single-sign-on/saml-configuration>)
- [OIDC Configuration] (<https://docs.dynatrace.com/docs/manage/identity-access-management/single-sign-on/configure-oidc>)
- [Access Tokens] (<https://docs.dynatrace.com/docs/manage/access-control/access-tokens>)
- [OAuth Clients] (<https://docs.dynatrace.com/docs/manage/identity-access-management/oauth-clients>)