



Adaptiva OneSite Cloud Portal User Guide

OneSite Cloud Portal User Guide

Adaptiva Copyright

Copyright © 2023-2025 Adaptive Protocols, Inc. - All Rights Reserved

Legal Notice

The information in these documents is proprietary and confidential to Adaptive Protocols, Inc. (Adaptiva®) and provided to customers for their internal use only. No part of this document may be reproduced or redistributed in any form without the prior written consent of Adaptiva.

All information supplied here is subject to change without notice. Contact Adaptiva to request the latest OneSite specifications and designs.

Adaptiva reserves the right to amend the product(s) or information disclosed herein at any time without notice. Adaptiva does not assume any responsibility or liability arising out of the application or use of any product or service described herein, except as expressly agreed to in writing by Adaptiva.

Any brand and/or product names mentioned may be trademarks of their respective companies.

Corporate Headquarters	E-mail	Website
Kirkland, WA +1 (425) 823-4500	<info@adaptiva.com>	www.adaptiva.com

Revision History

Date	Product Version	Document Version	Details
June 3, 2025	9.3.968.xx	v1.0	Initial Publication

Getting Started

Adaptiva products are simple and easy to implement. Adaptiva provides a SaaS model for OneSite Patch. The OneSite Cloud Portal provides IT professionals with high-level management of their companies and tenants.

This guide explains how to use the OneSite Cloud Portal. The SaaS deployment process is the same for supported Adaptiva products because they are all built on the OneSite Platform.

Customer Support

When you need information beyond what this documentation or our [Knowledge Base](#) provides, enter a support ticket and request help from [Adaptiva Customer Support](#) (support account required).

Signing Up as a User in the OneSite Cloud Portal

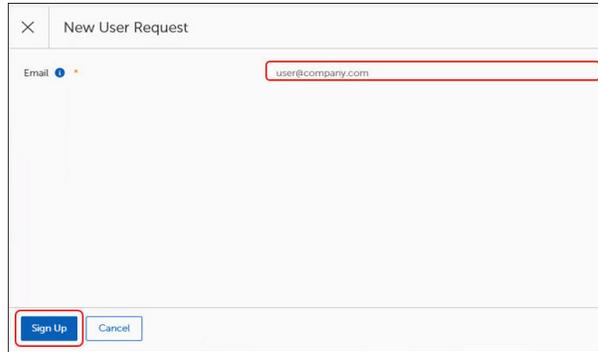
Sign up as a user to access OneSite Cloud Portal. After you register and log in, create your first Company and Tenant. The system assigns you the Super Administrator role for the Company you created. Next, invite users so they can access the tenant and/or help manage the Company.

Sign Up for the OneSite Cloud Portal

1. Enter the following URL into the address bar of a Browser:

<https://console.adaptiva.cloud>

2. Select **Sign Up** to create a request for your account. The **New User Request** dialog appears.



3. Enter your email address into the **Email** field, and then select **Sign Up** to create the request for your account. You will shortly receive an email from <twilio@adaptiva.com>, allowing you to register and activate your account to use on the OneSite Cloud Portal.



NOTE

You must use a corporate email account. No public domains are allowed (such as, gmail.com, hotmail.com, outlook.com, etc.).

Register Your OneSite Cloud Portal User Account

Twilio sends an email to users who either self-register or receive an invitation from an Administrator. The email contains a link to the **Register New User** dialog, where users complete their registration. For invited users, the email also includes a second link to activate the registered account with the company.

1. Navigate to your inbox, locate the email (from <twilio@adaptiva.com>), and then select the first link in the email to register your user account.



NOTE

You can use the invite for 24 hours after we send this email.

The **Register New User** dialog appears.

2. Select the **Admin Type** login from the list. You can choose from the following login options:
 - a. **Adaptiva:** Enter an email address, and password. Enter password again to confirm.



NOTE

Strong passwords are enforced for Adaptiva accounts; the password must be at least 10 characters long and contain at least one digit, an uppercase letter, and a lowercase letter.

- b. **OIDC Provider:** Select the provider as directed by your Company Administrator. If you are currently not logged in with that provider you will be prompted to log in.
3. Enter your **First Name** and **Last Name** in the respective fields.
4. Enter the following contact details (optional) into the respective fields:
 - Daytime phone number
 - After-hours phone number
 - Text Message phone number
 - WhatsApp phone number
 - Teams Webhook URL



TIP

For more information on the Teams Webhook URL, review the [Generating a Microsoft Teams Webhook URL](#) KB article.

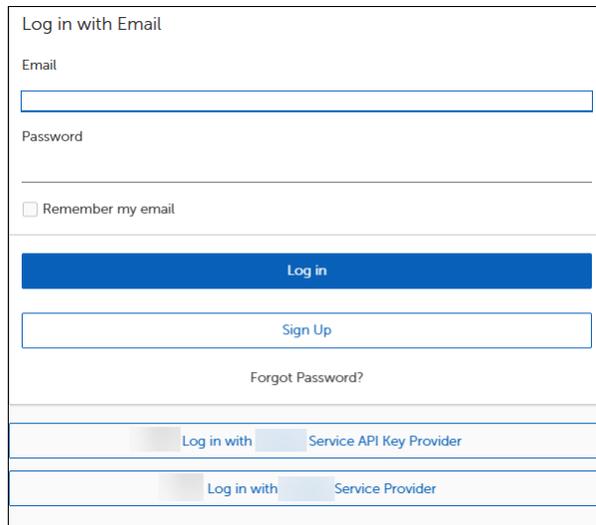
5. Select **Register** to create your account.
6. After you register your account using the first link in the invitation email, return to the email. If it includes a second link, select it to activate your account and sign in to the OneSite Cloud Portal.

Logging in to the OneSite Cloud Portal

Log in to the OneSite Cloud Portal using a native-login or OIDC-enabled account. You may also set up MFA with an authenticator app on your mobile device to add an extra authentication layer. This is setup after the initial login.

Log in to the OneSite Cloud Portal

- Log in to the OneSite Cloud Portal using one of the following options depending on your account type:



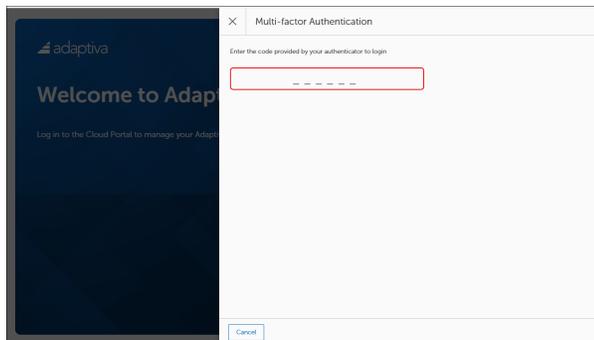
- a. Log in with your email using following steps:
 - i. Enter your Email address and Password to login using your activated Adaptive account.



TIP

You can check the box to remember the email address when you return to this web page.

- ii. If your account is configured to use MFA the **Multi-Factor Authentication** dialog appears.



- i. Enter the code provided by the authenticator app on your mobile device into the field.

- ii. After the authentication process completes, the system logs you into the OneSite Cloud Portal.
- b. Select **Log in with <Provider>** if your account has been set up using an OIDC Admin type.

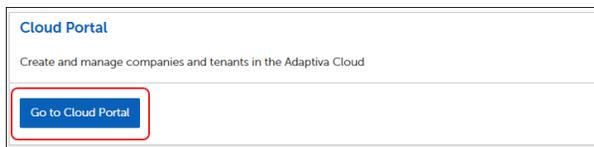
 **NOTE**
If you have not signed into your provider yet, the system will prompt you to complete the authentication.

Setting up your Company

Create a Company on the **Welcome to the Adaptive Cloud** page to get started.

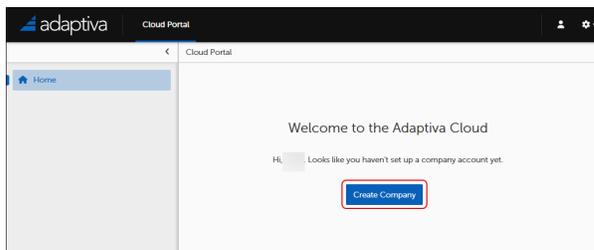
Create a Company

1. Click on **Go to Cloud Portal**.



The **OneSite Cloud Portal Home** page appears.

2. Select **Create Company** to create your first Company or select **+ New Company** to create additional Companies.



The **Create Company** dialog appears.

3. Enter the following company details into the respective fields under **Company Metadata** on the **Create Company** dialog:

- **Company Name:** The name of the Company.
- **Subdomain:** Constructs the company URL and appends `.adaptiva.cloud` to the subdomain entered. The subdomain cannot be changed after you save.



NOTE

The subdomain must follow these specific requirements:

- Starts with a letter
- Lowercase alphanumeric
- Between 1-30 characters

- **Description:** Describes the Company.
 - **Employee Count:** The number of employees associated with the Company.
 - **Postal Code:** The five-digit numeric code associated with the postal delivery area where the Company is located.
 - **State / Region / Province:** The administrative division within a Country where the Company is located.
 - **Country:** The self-governing territory where the Company is located.
4. Select **Save** to create the company.



NOTE

After creating your Company, you will receive a confirmation email from `<twilio@adaptiva.com>`.

Setting up your Tenant

Create a new Tenant within the Company you created, either under **My Tenants** on the **OneSite Cloud Portal Home** page or the **Tenants** tab of the **Company** page.

Create a Tenant

1. Select **+ New Tenant** on the **Tenants** tab on the **Company** page.
2. Enter the desired **Name** and **Description** in the respective fields under **General Settings** on the **Create Company Tenant Configuration** dialog.
3. Enter the desired **Subdomain** in the respective field. For example, `cloudpatch` creates the URL `cloudpatch-company.adaptiva.cloud`.

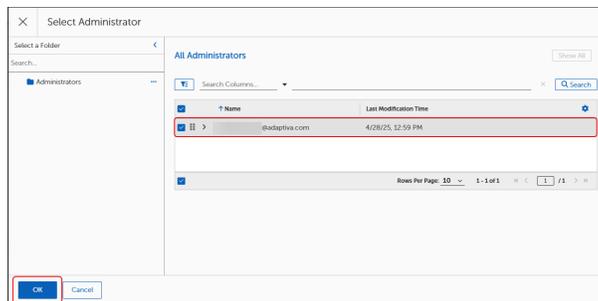


NOTE

The system combines the Tenant subdomain with the Company subdomain to create the Tenant portal URL. The subdomain must follow specific requirements:

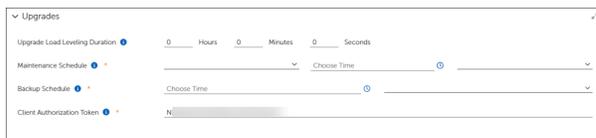
- Starts with a letter
- Lowercase alphanumeric
- Between 1-30 characters

4. Configure the **Creation Settings** using the following steps:
 - a. Select **Browse** next to **Initial Administrators**.
 - b. Select the desired **Administrator** from the **All Administrators** list.
 - c. Select **OK** to return to the **Create Company Tenant Configuration** dialog.



The administrator appears in the **Initial Administrators** list under **Creation Settings**.

- d. (Optional) Enter a product license key into the **Initial License** field, and then select **+Save License Key** to add it to the Tenant. Add additional license keys, as necessary.
5. Select the desired region from the **Tenant Region** dropdown list under **Regioning**.
 6. Configure the settings under **Upgrades**:



- a. Enter the desired number of **hours**, **minutes**, or **seconds** to load balance the upgrade of the **Adaptiva Client**.
- b. Set the maintenance schedule for when the Tenant may be taken offline for maintenance. A one-hour window is assigned to your Tenant. Set the schedule using the following steps:
 - i. Select the day from the dropdown menu.
 - ii. Select , and then select the desired time from the dialog.
 - iii. Select the desired time zone from the dropdown menu.



NOTE

The time you select must fall between 9:00 AM - 9:00 PM US/Pacific time.

- c. Set the daily database backup time using the following steps:
 - i. Select , and then select the desired time from the dialog.
 - ii. Select the desired time zone from the dropdown menu.
7. Select **Save** at the upper-left of the **Create Company Tenant Configuration** dialog.



TIP

The system may take several minutes to create your Tenant. When it is ready, you will receive an email from <twilio@adapitva.com> confirming that the Tenant is available for use.

Provisioning States

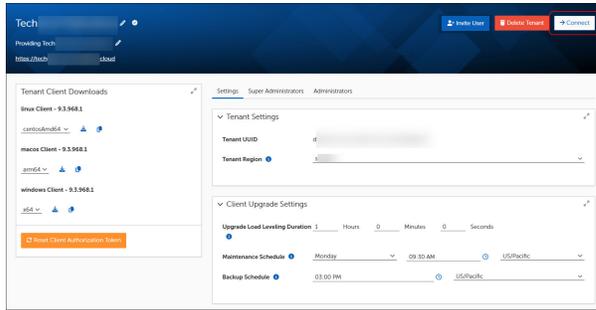
A tenant appears under **My Tenants** with a Provisioning State icon. The following icons indicate the provisioning state of the Tenant:

- **Setup:** This icon () indicates that the system is setting up the new Tenant.
- **Active:** This icon () indicates that the Tenant is active.
- **Disabled:** This icon () indicates that the Tenant is disabled.

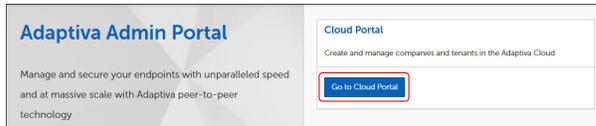
Connect to Your Tenant

Connect to your Tenant using the following steps:

- Select  **Connect** on the upper-right of the **Tenant** page.



The Adaptiva Admin Portal appears.



IMPORTANT

After seven days of inactivity, you will receive an email from <twilio@adaptiva.com> notifying you of the inactivity. The Tenant will be disabled after being inactive for 30 days. At 90 days of inactivity, the Tenant is automatically deleted. Open a ticket with [Adaptiva Support](#) for help with enabling the Tenant before it is deleted.

Downloading the Adaptiva Client

Download the installation file () or copy the URL () next to the desired OS option under **Tenant Client Downloads**. Administrators may reset the **Client Authorization** token to prevent previously downloaded installers from connecting to the Adaptiva Server. Clients already installed will not be affected when resetting the Authorization token.

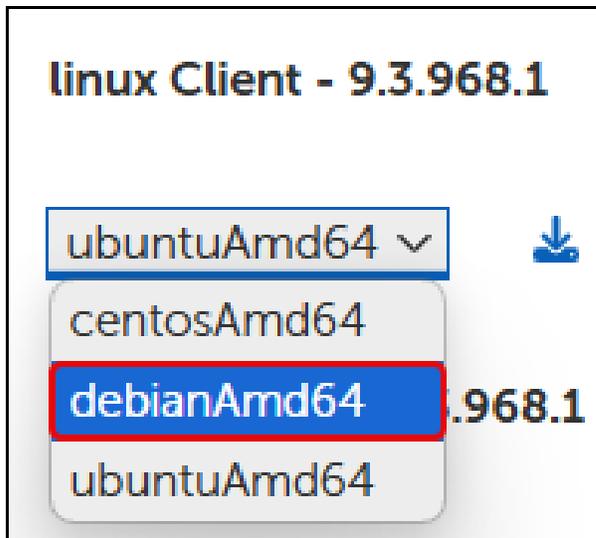


TIP

Replace the file name in <> with the name of the downloaded file.

Download and Install the Linux Client

1. Select the client (**centosAmd64**, **debianAmd64**, or **ubuntuAmd64**) from the dropdown menu.



2. Select  to download the shell script to your machine.
3. Open a Terminal window, and then run the following command to verify that `<script-name.sh>` is executable:

```
chmod 744 <path>/<script-name.sh>
```
4. Run the following command to execute the Linux Client script:

```
sudo <path>/<script-name.sh>
```

Download and Install the macOS Client Script

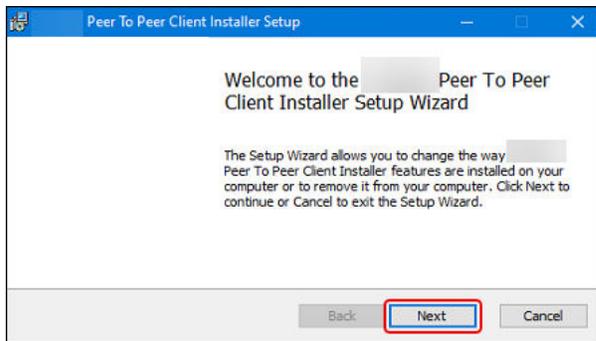
1. Select  to download the shell script to your machine.
2. Open a Terminal window, and then run the following command to verify that `<script-name.sh>` is executable:

```
chmod 744 <path>/<script-name.sh>
```
3. Run the following command to execute the macOS Client script:

```
sudo <path>/<script-name.sh>
```

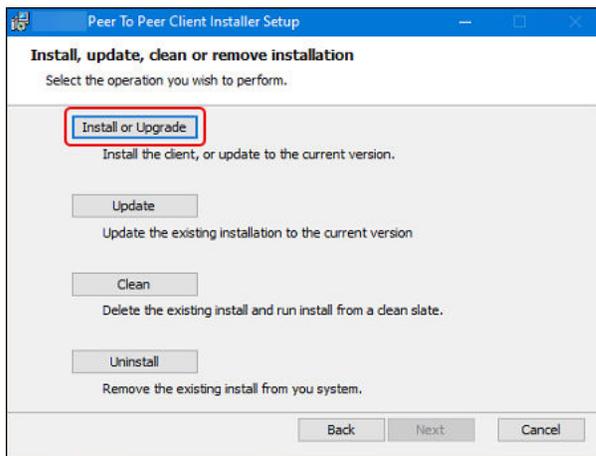
Download and Install the Windows Client

1. Select  to download the Windows installer script to your machine.
2. Locate the `<adaptiva-client-p2p-#.#.###.#-#####-windows.msi>` executable file on your machine, and then double-click it to execute.
3. The **Peer To Peer Client Installer Setup** wizard appears.



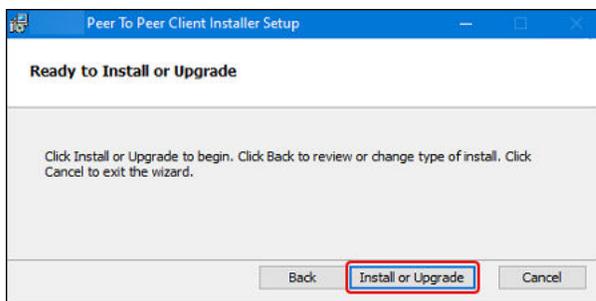
4. Select **Next** to initiate the setup.

The **Install, update, clean, or remove installation** dialog appears:



5. Select **Install or Upgrade**.

The **Ready to Install or Upgrade** dialog appears:



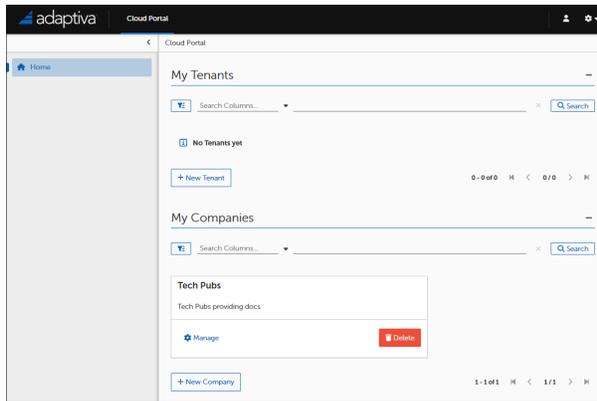
6. Select **Install or Upgrade**, and then select **Finish** to exit the installer setup wizard.

Navigating the OneSite Cloud Portal

Manage your company, tenants, and users from the OneSite Cloud Portal **Home** page.

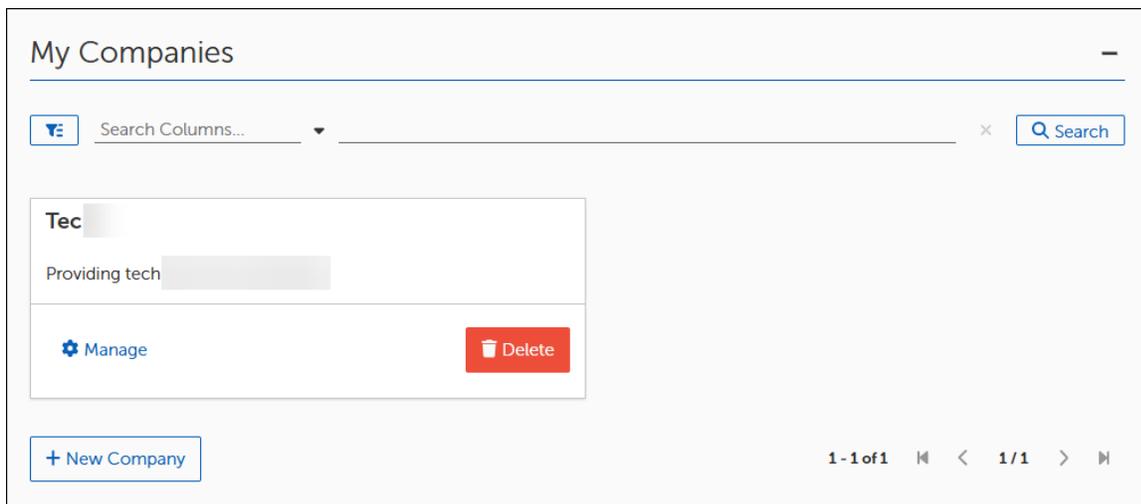
OneSite Cloud Portal Home Page Overview

On the **Home** page, you will see all the companies and tenants that you are associated with. Depending on the permissions assigned to you, you may be able to add, edit, or delete companies and tenants that you are associated with. For more information, see [Administrator Roles and Responsibilities](#).



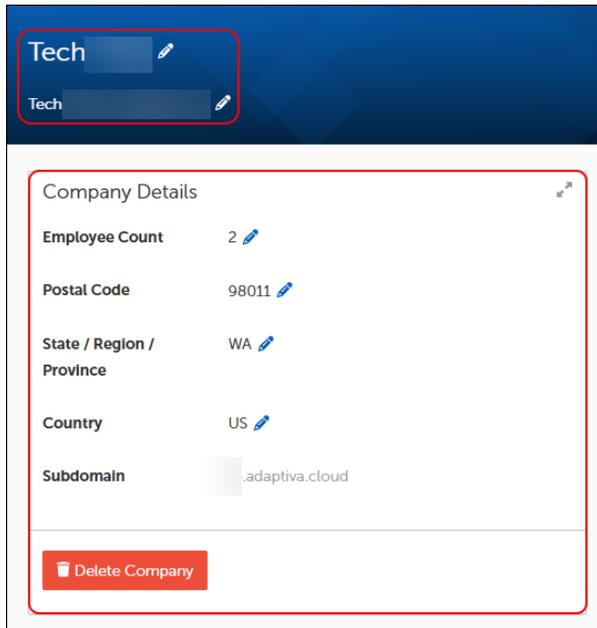
My Companies Section

Create, manage, or delete companies under **My Companies** on the **Home** page, depending on the permissions assigned to you.



To manage a company, click **Manage** on the appropriate company.

Edit the Company Details



The screenshot shows a user interface for editing company details. At the top, there are two input fields for the company name, both containing the text 'Tech'. Below this is a section titled 'Company Details' which contains several fields: 'Employee Count' with the value '2', 'Postal Code' with '98011', 'State / Region / Province' with 'WA', 'Country' with 'US', and 'Subdomain' with '.adaptiva.cloud'. Each field has a small blue pencil icon next to it, indicating it is editable. At the bottom of the 'Company Details' section, there is a red button with a trash icon and the text 'Delete Company'.

1. Select  next to the field to make the necessary edits to the following Company information upper-left of the **Company** page:
 - Company name
 - Company description
2. Select  next to the field to make the necessary edits to the following Company details under **Company Details**:
 - Employee count
 - Postal code
 - State, region, or province
 - Country



NOTE

The system automatically saves any edits you make to the **Company** page.

Delete a Company

1. Select **Delete Company** under **Company Details** on the **Company** page.

Company Details

Employee Count	2
Postal Code	98011
State / Region / Province	WA
Country	US
Subdomain	tp.adaptiva.cloud

Delete Company

2. Select **OK** on the **Schedule deletion for...** dialog to schedule the deletion of the Company.
3. The Company will be deleted 90 days from the date and time the deletion was requested.



NOTE

After deleting your Company, you will receive an email from <twilio@adaptiva.com> confirming the deletion request.

Cancel Deletion Request

- Select **Cancel Deletion Request** under **Company Details** on the **Company** page.

Company Details

Employee Count	2
Postal Code	98011
State / Region / Province	WA
Country	US
Subdomain	tp.adaptiva.cloud

Cancel Deletion Request

The **Cancel Deletion Request** option no longer appears on the **Company Details** section.



NOTE

After canceling the deletion of your Company, you will receive an email from <twilio@adaptiva.com> confirming the cancellation request.

My Tenants Section

Create, connect, manage, or delete tenants under **My Tenants** on the **Home** page, depending on the permissions assigned to you.

The screenshot shows the 'My Tenants' interface. At the top, there is a search bar labeled 'Search Columns...' and a 'Search' button. Below this, there are two tenant cards. Each card has a header 'Tech' with a checkmark, a 'Providing Tech' field, and three buttons: 'Connect', 'Manage', and 'Delete'. At the bottom left, there is a '+ New Tenant' button. At the bottom right, there is pagination information: '1 - 2 of 2' with navigation arrows.

To manage a tenant, click **Manage** on the appropriate tenant.

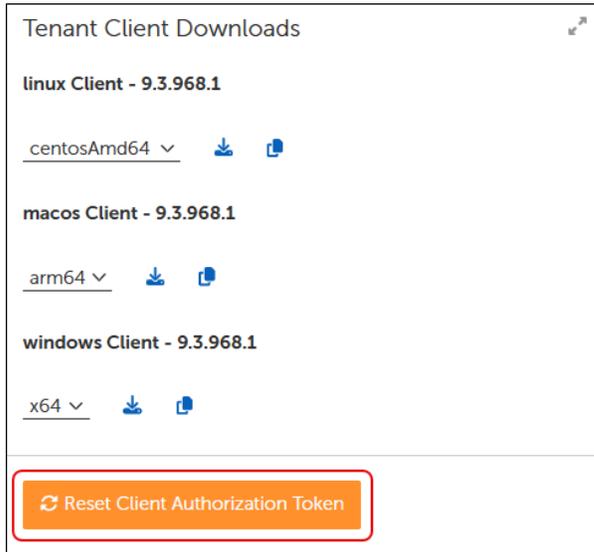
Client Upgrade Settings

Set the Load Leveling for the Client auto upgrade, the maintenance schedule for upgrading the Tenant, and the backup schedule under **Client Upgrade Settings** on the **Tenant** page.

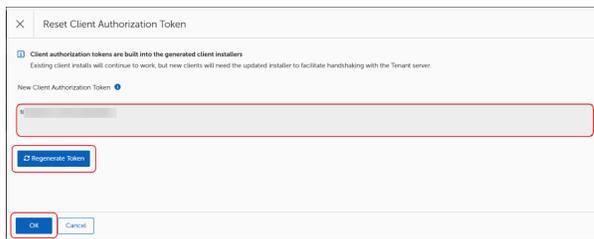
The screenshot shows the 'Client Upgrade Settings' section. It is part of a larger settings page with tabs for 'Settings', 'Super Administrators', and 'Administrators'. The 'Client Upgrade Settings' section is highlighted with a red rounded rectangle. It contains three settings: 'Upgrade Load Leveling Duration' with input fields for 0 Hours, 0 Minutes, and 0 Seconds; 'Maintenance Schedule' with a dropdown for 'Tuesday', a time field for '09:30 AM', and a time zone dropdown for 'PST'; and 'Backup Schedule' with a time field for '11:30 AM' and a time zone dropdown for 'PST'.

Reset the Client Authorization Token

1. Select **Reset Client Authorization Token** under **Tenant Client Downloads** on the **Tenants** page.



The new token appears on the **Reset Client Authorization Token** dialog:



2. (Optional) Select **Regenerate Token** to create a different token or enter your own token.



NOTE

The token must be an alphanumeric string between 8-64 characters.

3. Select **OK** to return to the **Tenant** page.

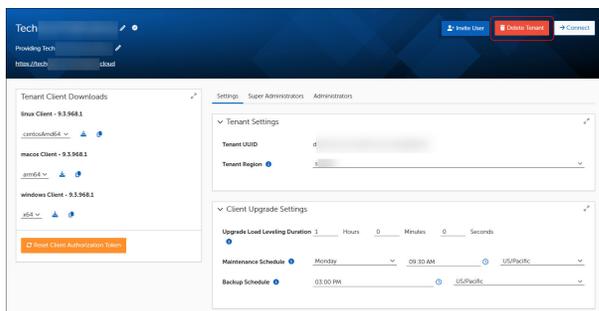


IMPORTANT

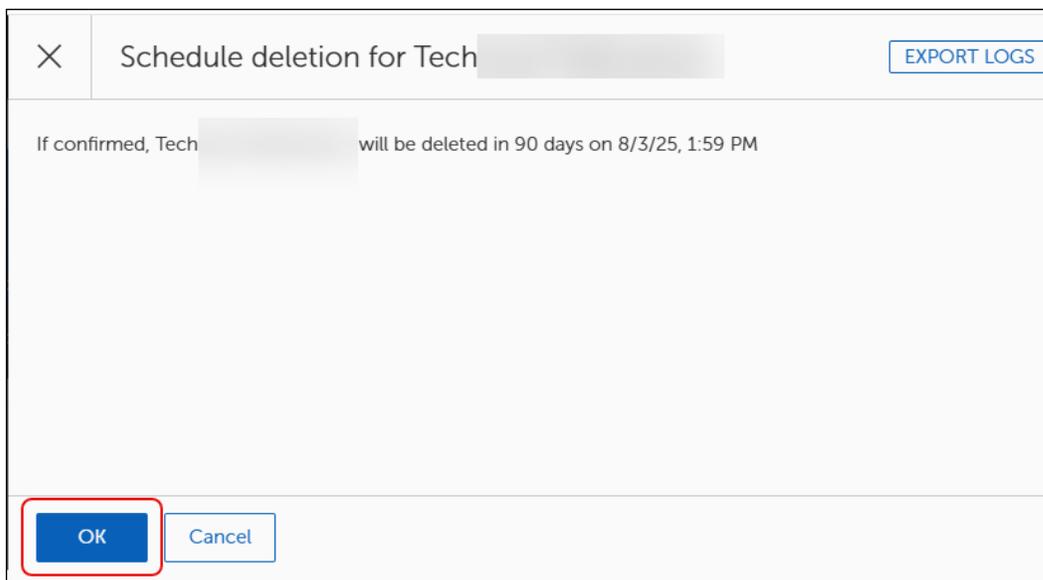
Client authorization tokens are now replaced in the client installers. Existing clients will keep working. However, new installations require the updated installer to facilitate handshaking with the Tenant server. Download new installers after changing the Authorization token and delete any previously downloaded files.

Delete a Tenant

1. Select  **Delete Tenant** on the upper-right of the **Tenant** page.



The Schedule deletion for <...> dialog appears:



2. Select **OK** to schedule the deletion of the Tenant.

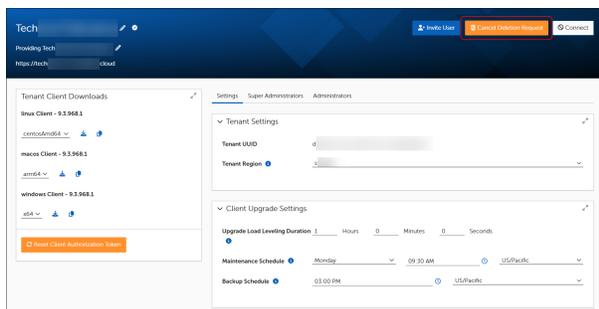


NOTE

Tenants will automatically be deleted 90 days after the request. You will receive an email from <twilio@adaptiva.com> confirming that the Tenant was deleted.

Cancel Tenant Deletion

Select  **Cancel Deletion Request** on the upper-right of the **Tenants** page to cancel the Tenant deletion request.



NOTE

You will receive an email from <twilio@adaptive.com> acknowledging the cancellation of the Tenant deletion request.

Administrator Roles and Responsibilities

Review the user roles and responsibilities in this section to understand each role before assigning it to users.

Administrator Roles

The following roles and permissions are available in the OneSite Cloud Portal:

- **Company Super Administrator:** The Super Admin for the Company to which they are assigned.
- **Company Administrator:** The Administrator for the Company to which they are assigned.
- **Tenant Super Administrator:** The Super Admin for the Tenant to which they are assigned.
- **Tenant Administrator:** The Administrator for the Tenant to which they are assigned.
- **User:** The user who registers and signs into the OneSite Cloud Portal.

Company Super Administrator Role

The Company Super Administrator role is automatically assigned to the user who creates the company. Invited users can also be added to this role.

Permissions

The Company Super Administrator role allows the user to do the following tasks within their assigned Company:

- Create up to five companies
- Edit Company details
- Delete the Company
- Invite users to the Company or any of its Tenants.
- Assign or remove the Company Super Admin role for other users
- Assign or remove the Company Admin role
- Assign or remove the Tenant Super Admin role or the Tenant Admin role
- Create up to five Tenants in the Company
- Delete any Tenant

Company Administrator Role

Users can be assigned or invited to a Company Administrator role.

Permissions

The Company Administrator role allows the user to do the following tasks within their assigned company:

- Manage the Company
- [Invite users to the Company](#)
- [Invite users to a Tenant](#)
- Create, modify, or delete Tenants

Tenant Super Administrator Role

Users can be assigned or invited to the Tenant Super Administrator role.

Permissions

The Tenant Super Administrator role allows the user to do the following tasks within their assigned Tenant:

- Access the Tenant.
- Invite users to a Tenant and assign either the Tenant Super Admin role or the Tenant Admin role.
- Invite users to a Tenant and assign either the Tenant Super Admin role or the Tenant Admin role.

Tenant Administrator Role

The Tenant Super Administrator assigns or invites user to this role within the Tenant to which they are assigned.

Permissions

The Tenant Administrators are added to the All Admin role on the tenant. The Tenant Super Administrator can add the user to additional roles on the Tenant. The Tenant Administrator role allows the user to do the following tasks within their assigned Tenant:

- Access the Tenant
- Download clients

User Role

Each user who signs up for the OneSite Cloud Portal is automatically assigned this role.

Permissions

The User role allows the user to do the following tasks:

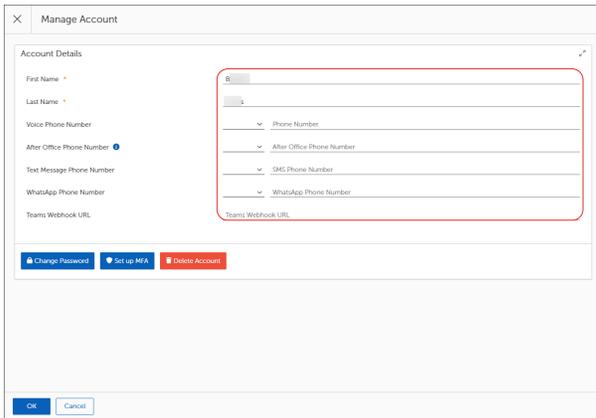
- Sign in to the OneSite Cloud Portal
- Create a company

Managing Your Account

Manage your user account details, change your password, or delete your account by navigating to  > **Manage Account** page.

Update User Information

1. Select  on the upper-right of the **Home** page, and then select **Manage Account** on the dialog that appears.
2. Make the desired updates to the fields below, and then select **OK** to save your changes.



- First Name
- Last Name
- Voice Phone Number
- After Office Phone Number
- Text Message Phone Number
- WhatsApp Phone Number
- Teams Webhook URL

Change Your Password

1. Select  **Change Password** on the **Manage Account** page. The **Change Password** dialog appears.

2. Enter the new password in the **Enter New Password** field.
3. Re-enter the new password into the **Confirm Password** field.
4. Select **OK** to return to the **Manage Account** dialog.

Set up MFA

1. Select  **Set up MFA** on the **Manage Account** dialog. The **Multi-factor Authentication Setup** dialog appears.

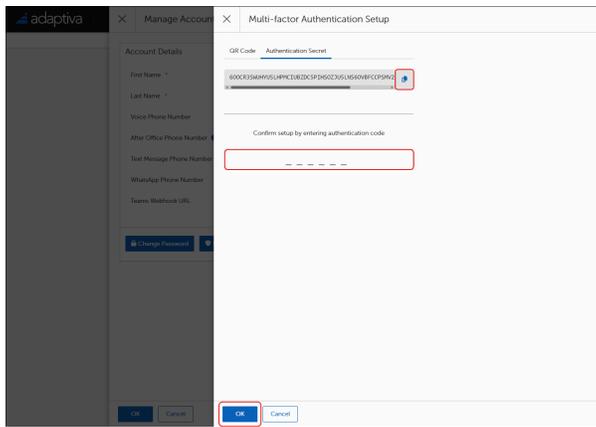


NOTE

MFA is only available with native-logins.

2. Set up MFA using one of the following options:
 - a. Scan the QR code with the authenticator app on your mobile device on the **QR Code** tab.

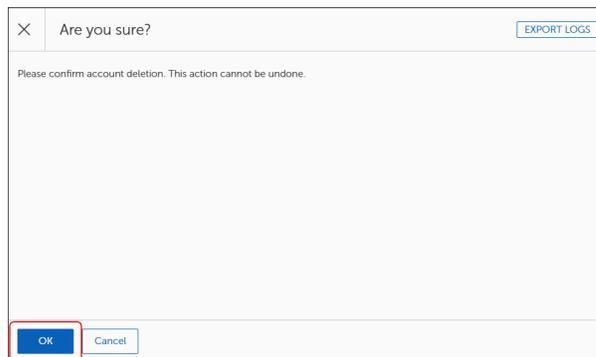
- Enter the authentication code from your authenticator app into the field to complete setup.
- b. Copy the authentication secret on the **Authentication Secret** tab.



- i. Use the authentication secret to register a new account with your authentication app
- ii. Enter the authentication code from your authenticator app into the field to complete setup.

Delete Your Account

1. Select **Delete Account** on the **Manage Account** dialog to delete your account. The **Are you sure?** dialog appears.



2. Select **OK** to confirm the account deletion.

User Invitation

The appropriate administrators can invite users to a company or tenant and assign them to desired roles.

Invite Users to a Company

1. Select **Invite User** on the upper-right of the **Company** page. The **Invite user to...** dialog appears.
2. Enter the **user email** in the respective field.



NOTE

You must use a corporate email account. No public domains are allowed (such as, gmail.com, hotmail.com, outlook.com, etc.).

3. Select the **User Role** dropdown menu, and then select either the Company Administrator role or the Company Super Administrator role to assign to the invited user.

The screenshot shows a dialog box titled "Invite user to L". It has a close button (X) in the top left. Below the title bar, there are two fields: "User Email" with a blue information icon and a value of "abc@123.com", and "User Role" with a blue information icon and a dropdown menu. The dropdown menu is open, showing three options: "Super Admin", "Admin", and "Super Admin". The "OK" button is highlighted in blue, and the "Cancel" button is in light blue.

4. Select **OK** to send the invite.



NOTE

The user will receive an email from <twilio@adaptiva.com> with two links. The first link creates the account for the user and takes them to the OneSite Cloud Portal, where they can register their account. The second link presents the login page allowing the user login to the OneSite Cloud Portal and activates their account with the Company.

Invite Users to a Tenant

1. Select **Invite User** on the upper-right of the **Tenant** page.
The **Invite user to...** dialog appears.
2. Enter the **user email** in the respective field.



NOTE

You must use a corporate email account. No public domains are allowed (such as, gmail.com, hotmail.com, outlook.com, etc.).

3. Select the **User Role** dropdown menu, and then select either the Tenant Administrator role or the Tenant Super Administrator role to assign to the invited user.

Invite user to L

User Email

User Role

Super Admin

Admin

Super Admin

OK Cancel

4. Select **OK** to send the invite.



NOTE

The user will receive an email from <twilio@adaptiva.com> with two links. The first link allows users to register to the OneSite Cloud Portal. Once the user creates their account, they can return to the invite email and select the second link, which presents the login page, allowing the user to log in to the OneSite Cloud Portal and activate their account with the Tenant.