iboss Onboarding and Professional Services

Enterprise and Government

Getting started with Zero Trust SASE doesn't have to be overwhelming. The iboss onboarding team is here to guide you through the essential first steps, so you can deploy with confidence, gain value quickly, and scale securely.

The Challenge

Many organizations need to adopt cloud services for access and security but lack the in-house expertise to confidently begin the transition from legacy on-premises solutions. Others may have the expertise but face resource constraints or competing priorities.

With iboss onboarding services, we help organizations take the critical first steps—providing guidance on identity integration, policy configuration, and connectivity

the start.

iboss Onboarding Services Overview

iboss brings engineering and solution design expertise to help organizations take the critical first steps in adopting a Zero Trust SASE architecture. Our onboarding services are designed to accelerate time-to-value by guiding the configuration and strategy needed to get started quickly—while aligning with best practices. This reduces the learning curve for IT and security teams and sets the stage for a smooth and successful rollout.

The onboarding engineers on the iboss team have supported thousands of customers in getting started with the iboss platform. They help align the onboarding process with your access and security goals, enabling your team to configure key components such as identity integration, policy enforcement, and network connectivity. Our goal is to reduce the workload on your IT staff while building their confidence to manage and scale the platform post-onboarding.

Throughout the onboarding engagement, your iboss engineer will guide you through defined milestones—from kickoff and setup through training and handoff. We'll empower your team with the tools, knowledge, and best practices needed to take ownership and succeed.

Planning

During the planning phase, the iboss onboarding engineer will review your subscription package, define success criteria, and outline key milestones for onboarding. This phase ensures alignment between your team and iboss, and sets the foundation for agent deployment, tunnel setup, policy configuration, and training.

Configuration

The configuration phase includes guidance for setting up authentication (IdP), redirecting user traffic, and establishing baseline Zero Trust policies. Your onboarding engineer will walk you through the platform's core configuration options based on the selected package.

Test Guidance

During this phase, the onboarding engineer will help your team validate core functionality such as user access, policy enforcement, and application reachability—ensuring your environment is ready for a successful launch.

Pilot

The pilot phase focuses on deploying agents to a small user group and validating access and policy behavior in a live environment. Your iboss engineer will support you with configuration tuning, user acceptance testing, and readiness checks for broader adoption.

Handoff & Transition

In the final phase of onboarding, your iboss engineer will help transition ongoing responsibilities to your team. You'll receive knowledge base access, reporting setup support, and guidance for next steps—along with a handoff to iboss's world class Technical Support.

The iboss Onboarding Services offerings for Enterprise and Government customers provide guided setup assistance for key iboss SASE cloud platform features. Each tier is designed to help your team confidently configure and begin using the platform with clarity and support.

Enterprise/GovernmentQuick StartStandardPremiumCustom Pro Services (Hourly Rate)

Design Consultation/Kickoff

Yes

Yes

Yes

Yes

User Identity Integration

1 Identity Provider (Azure, Okta, Google, etc..)

2 Identity Providers (Entra, Google, Okta, etc..)
AD Plugin / 802.1x

3 Identity Providers (Entra, Google, Okta, etc..)
AD Plugin / 802.1x

Yes

Admin Identity Integration

Self-Guided via iboss Academy SASE Core Onboarding Guide + KB

Yes, SCIM Self-Guided via KB

Yes, Includes SCIM

Yes

SaaS/Internet & ZTNA Policy Guidance

4 SaaS & Internet Policies

4 SaaS & Internet Policies
2 Peers / 2 Routed Policies

10 SaaS & Internet Policies
4 Peers / 4 Routed Policies
2 Resources With Advanced Connection Settings
Server Initiated Configuration Guidance

SSL Decryption Configuration Guidance

Yes, Managed SSL Decryption, 1 Custom Bypass

Yes, Managed SSL Decryption, 4 Custom Bypasses

Yes, Managed SSL Decryption, 10 Custom Bypasses

Full Custom Configuration

Microsoft 365 Steering

Per Microsoft O365 Networking Best Practices

Tenant Restrictions

Tenant Restrictions
Outlook Safelink Steering

Full Custom Configuration

CASB Configuration Guidance

Self-Guided via iboss Academy SASE Core Onboarding Guide + KB

2 inline CASB application controls
Block Uploads For 1 Category Of Sites

4 inline CASB application controls
1 API CASB Integration
Block Uploads For 1 Category Of Sites

Full Custom Configuration

Malware Prevention Configuration Guidance

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Guided Setup

Guided Setup

Full Custom Configuration

Data Loss Prevention Configuration Guidance

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2 DLP Rules

6 DLP Rules
Exact Data Match Configuration Guidance

Full Custom Configuration

Legacy Policy Reference (If Applicable)

Self-Guided via iboss Academy SASE Core Onboarding Guide + KB

Self-Guided via iboss Academy SASE Core Onboarding Guide + KB

Import 1 URL List

Full Custom Configuration

Securing Managed & Unmanaged Devices

Cloud Connector Software Agent (Managed)
DNS Security (Unmanaged)

Cloud Connector Software Agent (Managed)
DNS Security (Unmanaged)
iboss Private Cloud Gateway (Unmanaged)

Cloud Connector Software Agent (Managed)
DNS Security (Unmanaged)
iboss Private Cloud Gateway (Unmanaged)
IPSEC Tunnels via CPE or Network Connector

All Available Options Based on Environment

Software Agent Deployment

1 Manual Install For Each Applicable Device Type
1 MDM Install For Each Applicable Device Type
Best Practices Connector Policies Defined

2 Manual Installs For Each Applicable Device Type
2 MDM Installs For Each Applicable Device Type
Best Practices Connector Policies Defined

3 Manual Installs For Each Applicable Device Type
3 MDM Installs For Each Applicable Device Type
Best Practices Connector Policies Defined

Custom rollout strategy

Software Deployment Pilot/Testing

5 Devices per Device Type

10 Devices Per Device Type

20 Devices Per Device Type

Custom rollout strategy

ZTNA VPN Replacement

Self-Guided via iboss Academy SASE Core Onboarding Guide + KB

2 Peers / 2 Routed Policies
2 Locations with up to 2 tunnels per location
Network Connector or CPE Tunnel

5 Peers / 3 Routed Policies
5 Locations with up to 4 tunnels per location
Network Connector or CPE Tunnel

Full Custom Configuration

Agentless Remote Access (RBI)

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3 Resources

5 Resources

Full Custom Configuration

SD-WAN Guidance

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Self-Guided via iboss Academy SASE Core Onboarding Guide + KB

Connect 5 Locations

Full Custom Configuration

Reporting Setup & SIEM Stream Guidance

1 Log Export
1 Custom Report & Schedule
1 Incident Alert Consumer

Integration With 1 SIEM

2 Log Exports

3 Custom Report & Schedule

3 Incident Alert Consumer

Integration With 2 SIEMs

5 Log Exports

5 Custom Report & Schedule

5 Incident Alert Consumer

Full Custom Configuration

Onboarding Engagement Model

Remote
(Up to 8 Hours)

Remote
(Up to 40 Hours)

Remote
(Up to 80 Hours)

Remote or On-Site[1]

Onboarding Duration

60 days[2]

60 days[2]

60 days[2]

Based on Scope

[1]T&E additional, minimum 2 days for onsite onboarding engagements where applicable.
[2]Excluding Custom, all iboss onboarding services must be consumed within 60 days of order. Unused hours will convert to account credit.

To learn more about iboss Implementation Services

please contact sales@iboss.com or visit iboss.com/contact-us.

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About iboss

With over 4,000 customers, including the largest government, financial, insurance, energy, and technology organizations, iboss provides users direct and secure access to cloud applications from wherever they work. iboss transitions organizations from protecting in-office workers to protecting the modern work-from-anywhere workforce while providing fast, secure, and direct connections to cloud applications to increase productivity and protect organizations from malware and data loss. A Gartner Magic Quadrant "Visionary", and backed by 230+ issued and pending patents, iboss processes and secures over 150 billion daily network transactions globally and has built the largest containerized cloud security fabric. The iboss Government Cloud Platform enables agencies to modernize their architecture, by reducing the dependency or eliminating the need for traditional network security appliances that are no longer effective at protecting today's hybrid workforce. Jumpstart your SASE transformation and experience the future of cloud security today at http://www.iboss.com.