Deltek Costpoint® Cloud

Configuring Ping

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Overview

There are four steps to setting up Ping for Deltek Costpoint Cloud.

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1	Submit the SSO Setup Service Request
2	Configure Ping
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4	Configure Costpoint user accounts to use Ping for authentication

Note: If you are already set up for SAML SSO authentication in Costpoint Cloud, you will need to set up a second configuration for the Costpoint Mobile T&E in the Cloud. Follow the instructions in this guide to set up your configuration. See the *Deltek Costpoint Mobile Time and Expense in the Cloud Administrator Guide* for more information on Costpoint Mobile T&E in the Cloud.

Submit the SSO Setup Service Request

When you submit the SSO Setup Service Request, Deltek will attach the following information to the service request ticket.

- **Single sign on URL**: For example, https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps
- **Recipient URL**: For example, https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps
- **Destination URL**: For example, https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps
- **Audience URI (SP Entity ID)**: For example, https://acme-cp.deltekenterprise/cpweb
- **Default RelayState**: For example, system=ACME

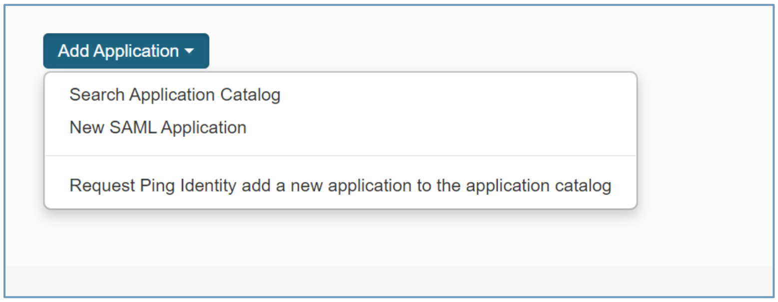
> **Note:** If you are a Costpoint Essentials customer, Deltek will provide you with one set of URLs. If you are a Costpoint Enterprise customer, Deltek will provide you with three sets of URLs.

> **Note:** If you are a Costpoint Mobile T&E customer, Deltek will provide you with two sets of URLs (one for Costpoint and one for Costpoint Mobile T&E).

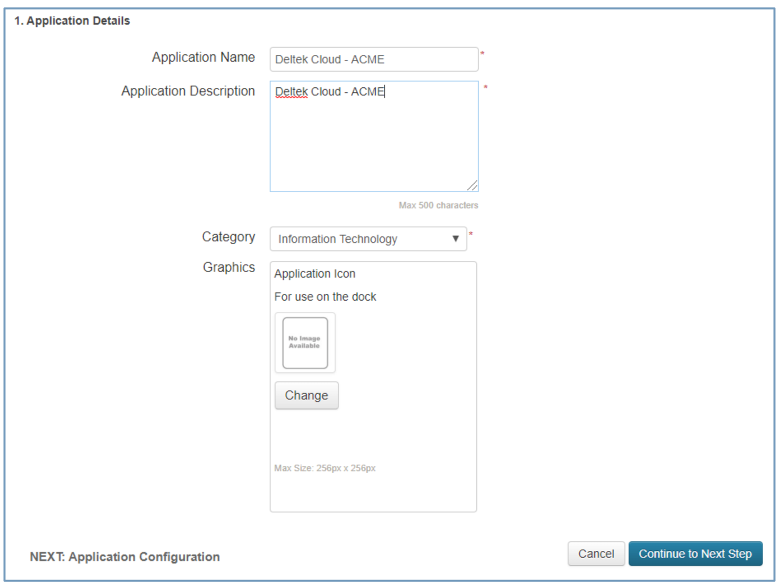
Configure Ping

To configure Ping:

1. Log into the Ping portal and click **Add Application » New SAML Application**.



2. On the Application Details screen, select or specify the following details and click **Continue to Next Step**.
   - **Application Name**: Enter any name.
   - **Application Description**: Enter the description of the application.
   - **Category**: Select the category for the application.
   - **Graphics (optional)**: If so desired, upload a logo for the application.



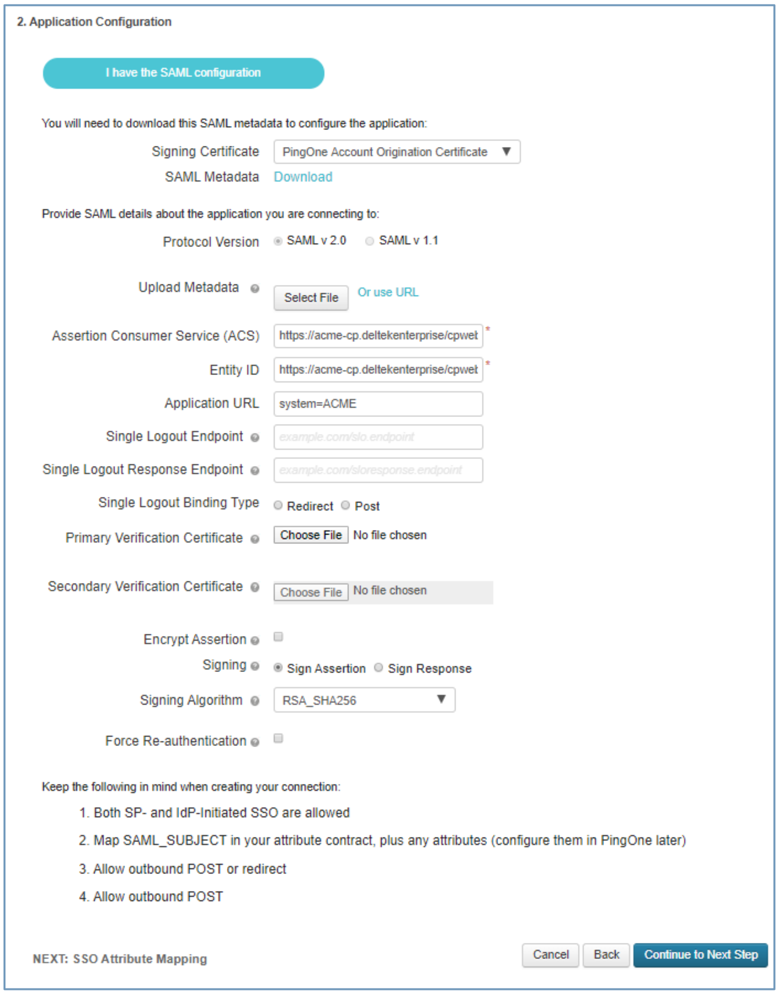
3. On the Application Configuration screen, perform the following and click **Continue to Next Step**.
   - Click **Download** in **SAML Metadata**. You need the SAML Metadata to configure the application. The metadata is automatically populated in Costpoint.

     Note: You may also download the SAML Metadata on the Review Setup screen.

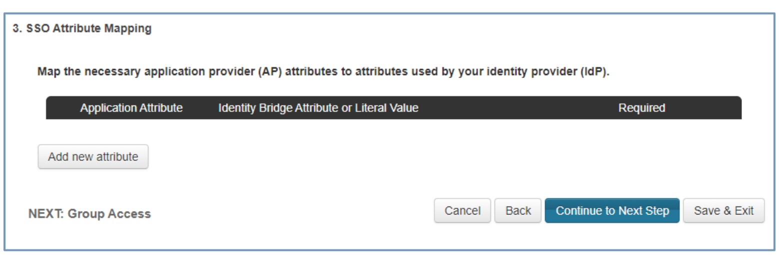
   - Click **Select File** in **Upload Metadata** to upload the Costpoint Metadata and to automatically populate the following required fields:

- **Assertion Consumer Service (ACS)**
- **Entity ID**
- **Application URL**

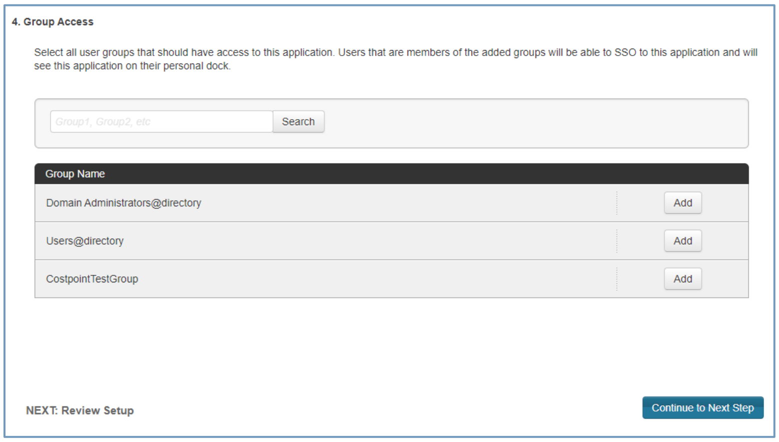
> **Note:** You must specify the fields above if you do not upload the Costpoint Metadata.



4. On the SSO Attribute Mapping screen, click **Continue to Next Step**:



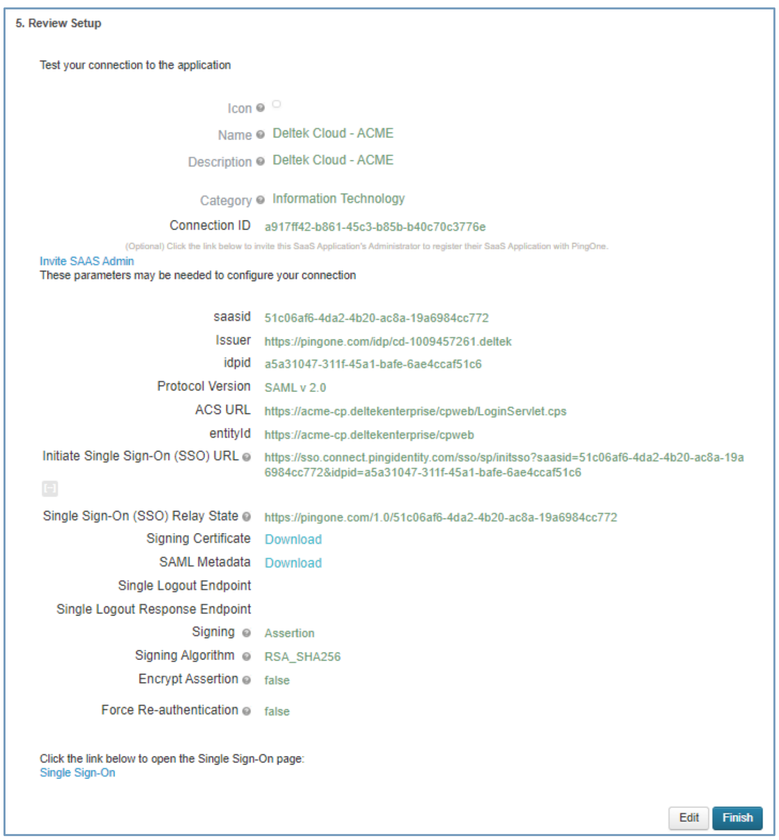
5. On the Group Access screen, search for the user group that will access the application and click **Continue to Next Step**.



6. On the Review Setup screen, review the setup details and click **Finish.**

> **Note:** If you have not yet downloaded the SAML Metadata, download it on this screen.

> **Note:** If you need to change any setup details, click **Edit**.



> **Note:** For Costpoint Enterprise users, you must repeat step 1 for each Cloud Environment (Production, Implementation/Test/Preview, Dev) that you would like to set up the Okta for.

> **Note:** For Costpoint Mobile T&E users, you must repeat step 1 for each Costpoint Mobile T&E environment that you would like to set up Okta for.

Attach Your Ping XML Certificate to Your SSO Setup Service Request Ticket

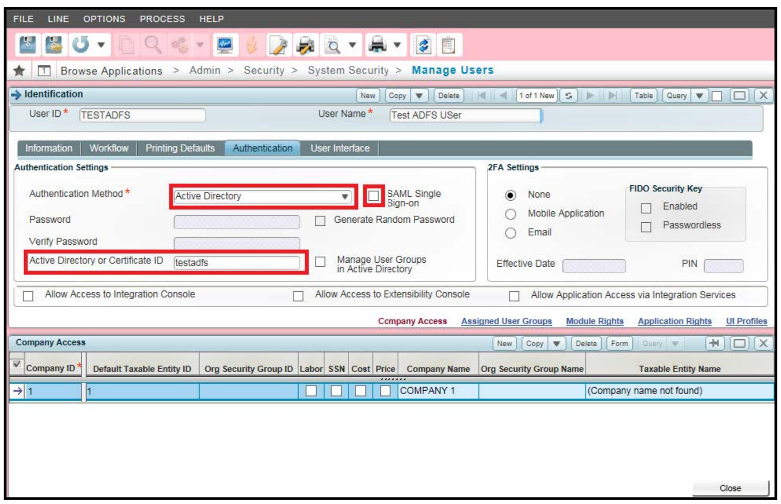
Attach the Ping XML certificate you created in Step 3 (Configure Ping) to the SSO Setup Service Request ticket you created in Step 2 (Submit the SSO Setup Service Request).

Configure Costpoint User Accounts to Use Ping for Authentication

In order to log into Costpoint with your Ping credentials, you must first modify the authentication properties of your Costpoint user account.

To modify the authentication properties:

1. Log into your Costpoint systems using a Cloud Active Directory (User Manager) account that has access to the Manage Users application within Costpoint.
2. Navigate to **Admin » Security » System Security » Manage Users** and locate the account to modify.
3. Click the Authentication tab.



4. In **Authentication Method**, select **Active Directory**.
5. In the **Active Directory or Certificate ID** field, enter the user's Active Directory user name in your domain.

   This can be the username or the username in UPN format (for example, **user@mydomain.local**).
6. If the user will be using SAML, select the **SAML Single Sign-on** check box.
7. Save the record.
8. Repeat steps 3 through 7 for each user in the Costpoint system who want to use the Ping authentication.

> **Note:** Repeat steps 3 through 7 for each user in the Costpoint Mobile T&E system who want to use the Ping authentication.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Costpoint, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

> **Attention:** Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

> **Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

> **Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

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