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Deltek Costpoint® Cloud

Configuring Active Directory Federation Services (ADFS)

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Overview

There are three steps to setting up Active Directory Federation Services (ADFS) for Deltek Costpoint Cloud.

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2	Use the XML files provided in the SSO Setup Service Request to configure ADFS
3	Set up your Costpoint User Accounts for ADFS

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

You need the following information to complete the SSO Setup Service Request:

- **Fully Qualified Domain Name**: This is the full name of the domain in which users will authenticate against (for example: FARM.COM).
- **Fully Qualified Domain Name Active Directory Federation Services Host Name**: This is the fully qualified name of the server that is hosting Active Directory Federation Services (for example: AD.FARM.COM).
- **XML file(s) provided by Deltek**:
  - If you are a Costpoint Essentials customer, Deltek will provide you with one XML file.
  - If you are a Costpoint Enterprise customer, Deltek will provide you with three XML files.
  - 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).

    The files will be attached to your SSO Setup Service Request ticket.

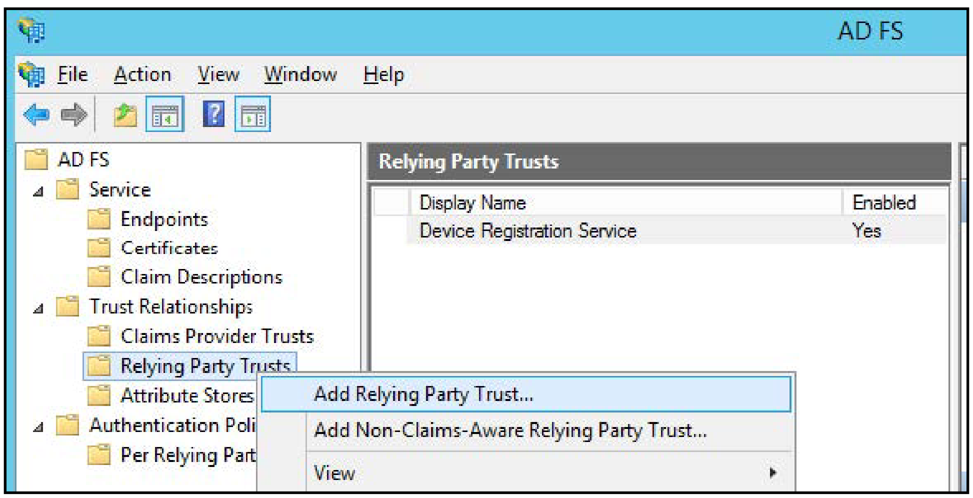
Use the XML Files Provided in Your SSO Setup Service Request to Configure ADFS

Note: For Costpoint Enterprise customers, you must repeat this step for each Cloud Environment (Production, Implementation/Test/Preview, Dev) for which you want to set up ADFS.

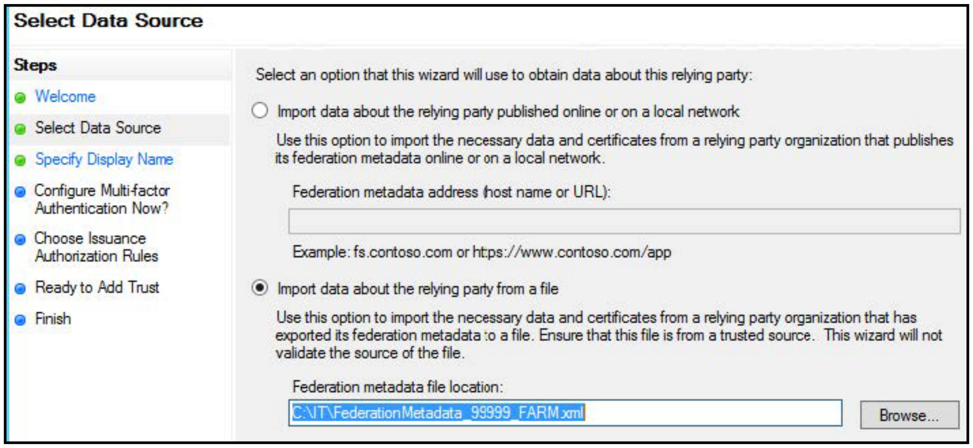
Note: For Costpoint Mobile T&E customers, you must repeat this step for each environment for which you want to set up ADFS.

To use the XML files to configure ADFS:

1. Copy the **FederationMetadata_ClientID_ClientNAME_ClientSystem.xml** that was provided to you in the SSO Setup Service Request onto your ADFS server.
2. Start the Active Directory Federation Services Management Console.
3. Select **Relying Party Trusts**, and click **Add Relying Party Trust**.

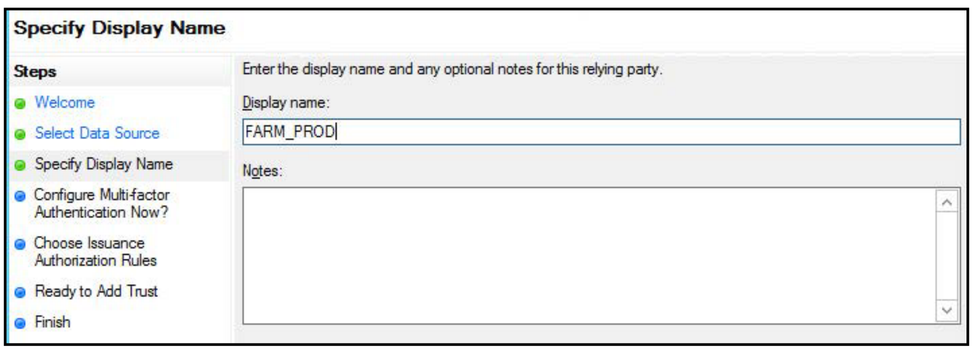


4. On Welcome page of the Add Relying Party Trust Wizard, click **Start**.
5. On the Select Date Source page, complete the following:
   a. Select the **Import data about the relying party from a file** option.
   b. Enter or browse to the **FederationMetadata_ClientID_ClientNAME_ClientSystem.xml** file you saved earlier, and click **Next**.

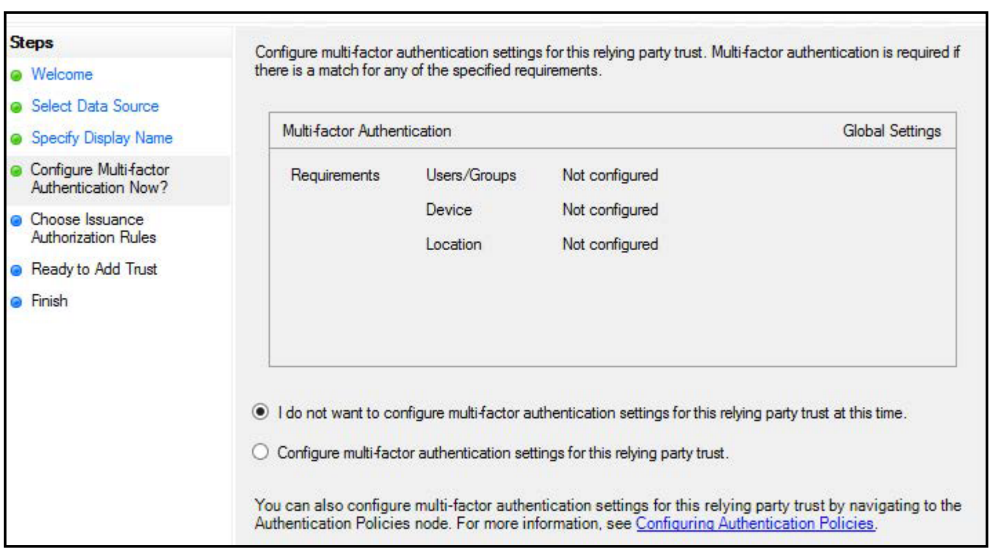


6. On the Specify Display Name page, enter a unique value for each system in the **Display name** field (for example, **<ClientName>_PROD**), and click **Next**.

   The relying party **Display name** entered here should allow you to easily identify the Costpoint system that is being configured.



7. On the Steps page, accept the defaults, ensure that the **I do not want to configure multi-factor authentication settings for this relying Party trust at this time** option is selected, and click **Next**.



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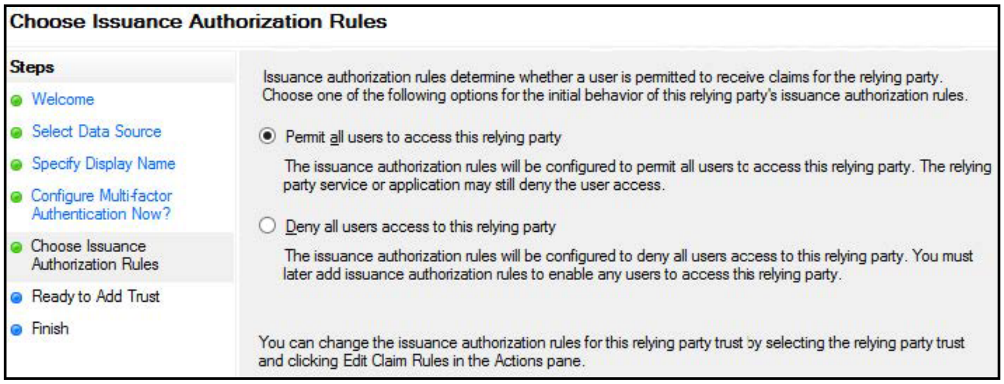
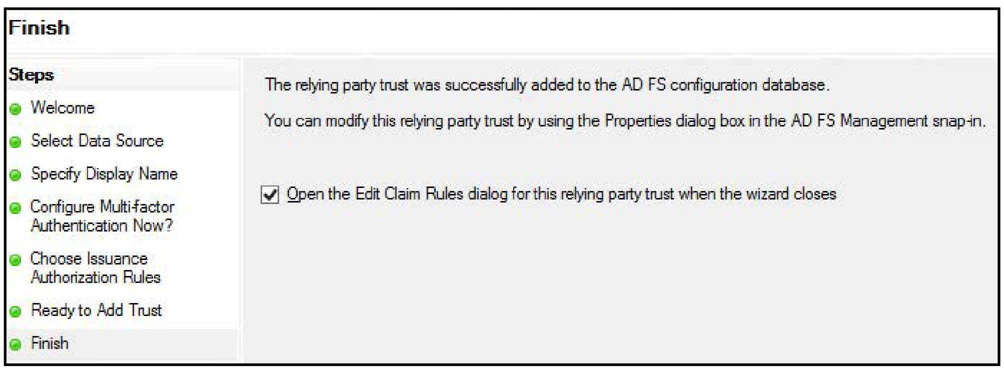
8. On the Choose Issuance Authorization Rules page, ensure that the **Permit all users to access this relying party** option is selected, and click **Next**.



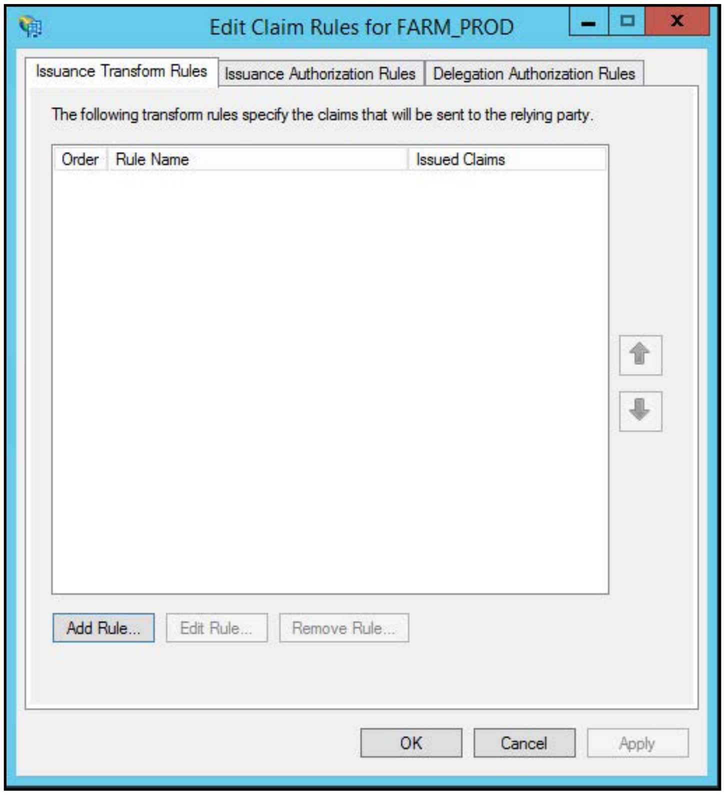
9. On the Ready to Add Trust page, accept defaults and click **Next**.

10. On the Finish page, ensure that the **Open the Edit Claim Rules for this relying party** check box is selected, and click **Close**.

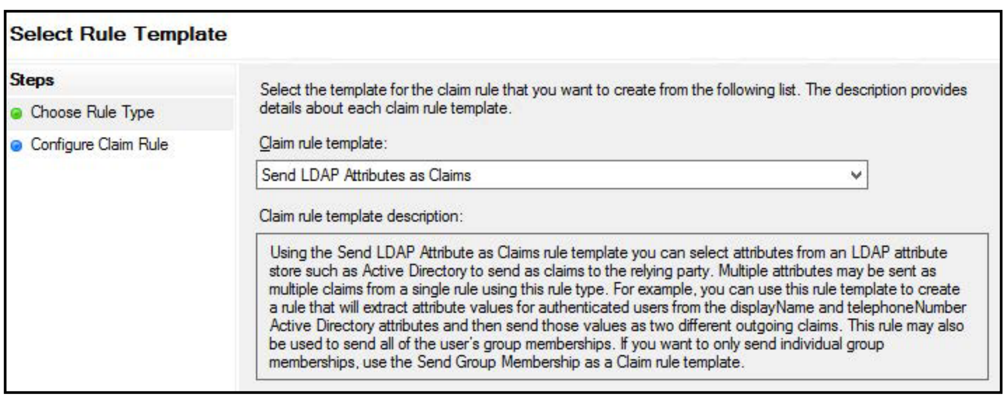


11. On the Edit Claim Rules for Costpoint dialog box, click **Add Rule**.

> **Note:** This section explains how to add an ADFS claim rule that will allow Costpoint to retrieve the group membership information from Active Directory Federation Services/Active Directory and synchronize this information with the Costpoint User Groups data.

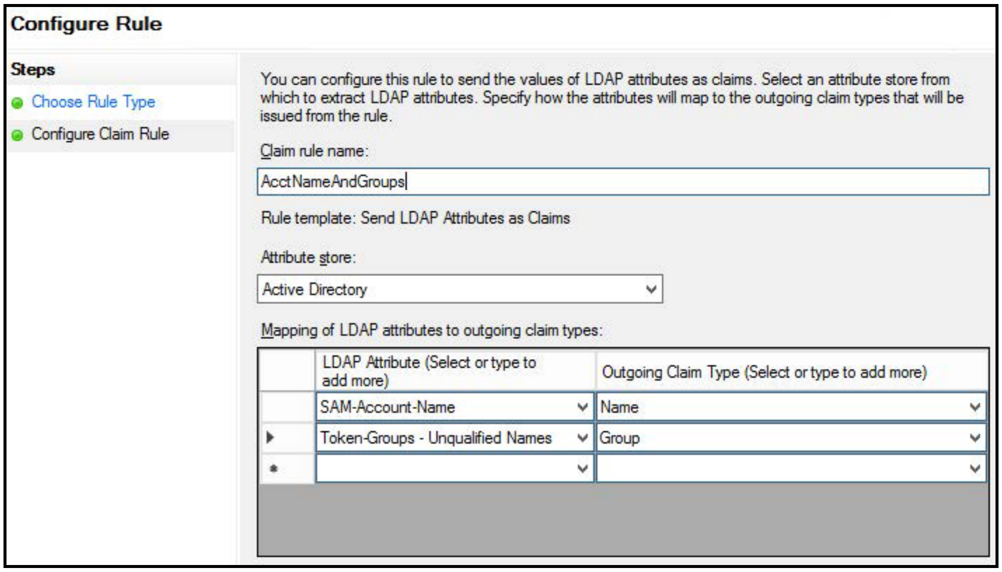


12. On the Select Rule Template page of the Add Transform Claim Rule Wizard, select **Send LDAP Attributes as Claims** in the **Claims rule template drop-down** list, and click **Next**.



13. On the Configure Rule page, perform the following:
    - **Claim rule name**: Enter AcctNameAndGroups.
    - **Attribute store**: Select **Active Directory** from the drop-down list.
    - **Mapping of LDAP attributes to outgoing claim types**: Take one of the following actions:
        - If you are using your company email address as your username, complete the following:
            - **LDAP Attribute**: Select **User-Principal-Name** from the drop-down list.
            - **Outgoing Claim Type**: Select **Name** from the drop-down list.
            - **LDAP Attribute**: Select **Token-Groups – Unqualified Names** from the drop-down list.

        - **Outgoing Claim Type**: Select **Group** from the drop-down list.
    - If you are NOT using your company email address as your username, complete the following:
        - **LDAP Attribute**: Select **SAM-Account-Name** from the drop-down list.
        - **Outgoing Claim Type**: Select **Name** from the drop-down list.
        - **LDAP Attribute**: Select **Token-Groups – Unqualified Names** from the drop-down list.
        - **Outgoing Claim Type**: Select **Group** from the drop-down list.



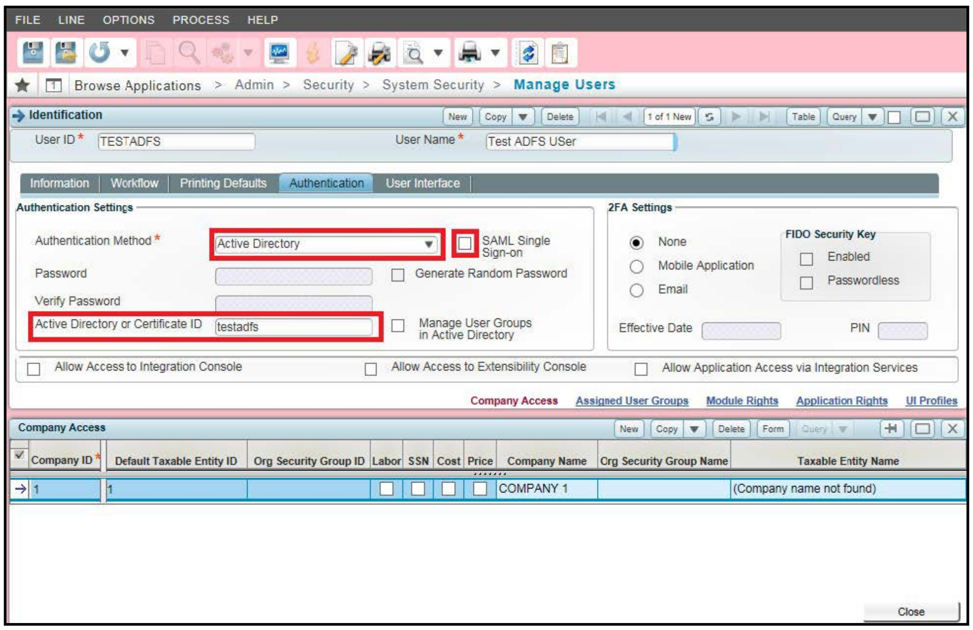
14. Click **Finish**, and then click **OK**.

Set Up Your Costpoint User Accounts for ADFS

In order to log into Costpoint with your ADFS 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 each Costpoint system who want to use the ADFS authentication.

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