



Deltek

Deltek Costpoint® Cloud

Configuring Okta

June 8, 2020



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Overview

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

Step	Procedure
1	Submit the SSO Setup Service Request
2	Configure Okta
3	Attach your Okta XML certificate to your SSO Setup Service Request ticket
4	Configure Costpoint user accounts to use Okta 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

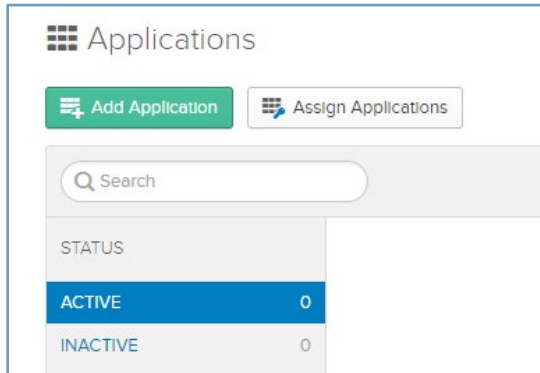
Note: If you are a Costpoint Essentials customer, Deltek will provide you with one set of URLs. If you are a Costpoint Enterprise customer, Deltek will provide you with three sets of URLs.

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).

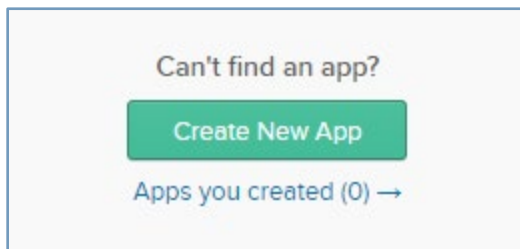
Configure Okta

To configure Okta:

1. Log into the Okta portal and click **Add Application**.

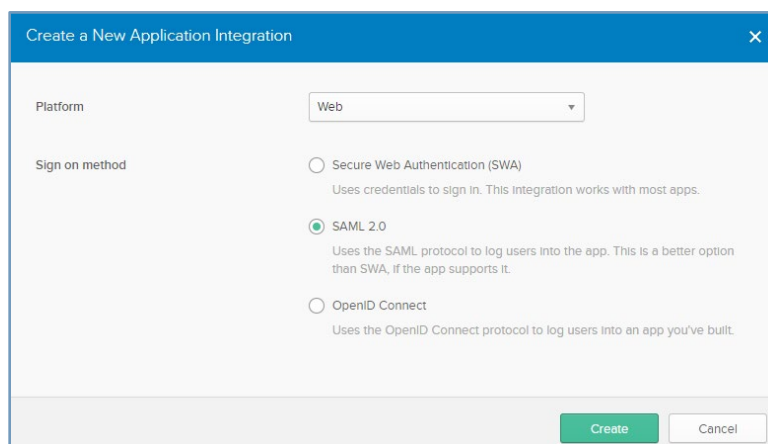


2. Click **Create New App**.



3. On the Create a New Application Integration screen, select or specify the following details and click **Create**:

- **Platform:** Select **Web**.
- **Sign on method:** Select the **SAML 2.0** option.



4. On the General Settings screen, select or specify the following details and click **Next**:

- **App name:** Enter any name.
- **App logo (optional):** If so desired, upload a logo for the application

- **App visibility:** Select either check box. You can choose not to display the application icon to users or not to display the application icon in the Okta Mobile application.

5. On the SAML Settings A screen, complete the following:

Note: To display all required fields, click **Show Advanced Settings**.

- **Single sign on URL:** This URL is provided by Deltek in the service request.
For example: **https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps**
- **Recipient URL:** This URL is provided by Deltek in the service request.
For example: **https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps**
- **Destination URL:** This URL is provided by Deltek in the service request.
For example: **https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps**
- **Audience URI (SP Entity ID):** This URL is provided by Deltek in the service request.
For example: **https://acme-cp.deltekenterprise/cpweb**
- **Default RelayState:** This setting is provided by Deltek in the service request.
For example: **system=ACME**
- **Response:** Unsigned

Configure Okta

A
SAML Settings

GENERAL

Single sign on URL
https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps
Use this for Recipient URL and Destination URL
Allow this app to request other SSO URLs

Recipient URL
https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps

Destination URL
https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps

Audience URI (SP Entity ID)
https://acme-cp.deltekenterprise/cpweb

Default RelayState
system=ACME
If no value is set, a blank RelayState is sent

Name ID format
Unspecified

Application username
Okta username

Hide Advanced Settings

Response
Unsigned

Assertion Signature
Signed

Signature Algorithm
RSA-SHA256

Digest Algorithm
SHA256

Assertion Encryption
Unencrypted

Enable Single Logout
Allow application to initiate Single Logout

Authentication context class
PasswordProtectedTransport

Honor Force Authentication
Yes

SAML Issuer ID
http://www.okta.com/\${org.externalKey}

- After the application is created, export the IDP metadata as an .XML file.
Costpoint does not support file with .cert extension.

Note: For Costpoint Enterprise users, you must repeat step 3 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 3 for each Costpoint Mobile T&E environment that you would like to set up Okta for.

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

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

Configure Costpoint User Accounts to Use Okta for Authentication

In order to log into Costpoint with your Okta 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.

The screenshot shows the 'Manage Users' application in Costpoint. The 'Authentication' tab is selected. The 'Authentication Method' is set to 'Active Directory'. The 'Active Directory or Certificate ID' field contains 'testads'. The 'SAML Single Sign-on' checkbox is checked. The 'ZFA Settings' section shows 'FIDO Security Key' options: 'None', 'Mobile Application', and 'Email'. The 'FIDO Security Key' section has 'Enabled' and 'Passwordless' checkboxes. The 'Effective Date' and 'PIN' fields are also visible.

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 Okta 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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