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Costpoint Cloud Configuring Okta

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Overview

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

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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

1. When you submit the SSO Setup Service Request (for details, click here), Deltek will attach the following information to the service request ticket.

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

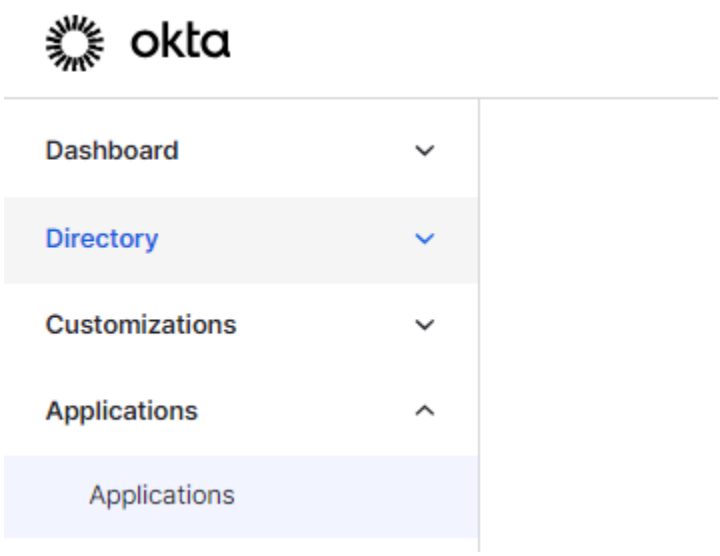
> **Note:** If you are a Costpoint Essentials customer, Deltek will provide you with one set of URLs. If you are a Costpoint Enterprise customer, Deltek will provide you with three sets of URLs. The URLs for Costpoint GovCon Moderate Enterprise and Essentials will look different than this example, use the URLs that you are provided in the ticket.

> **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).

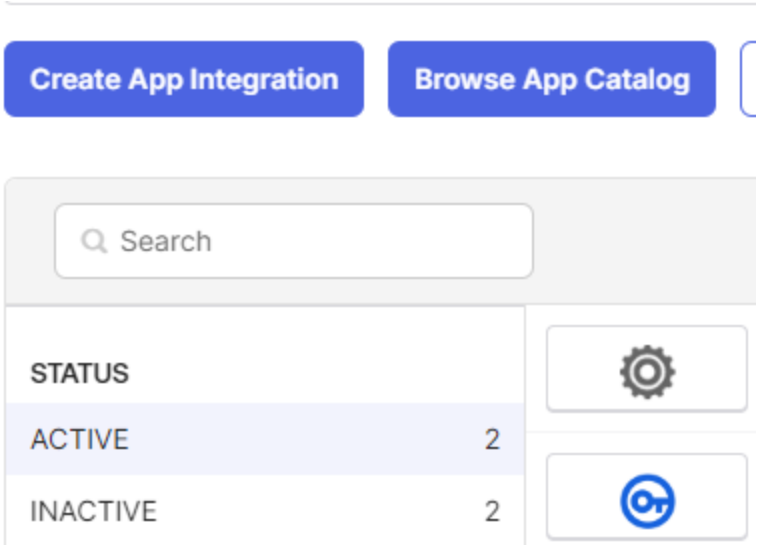
Configure Okta

To configure Okta:

1. Log into the Okta portal and click **Applications.**

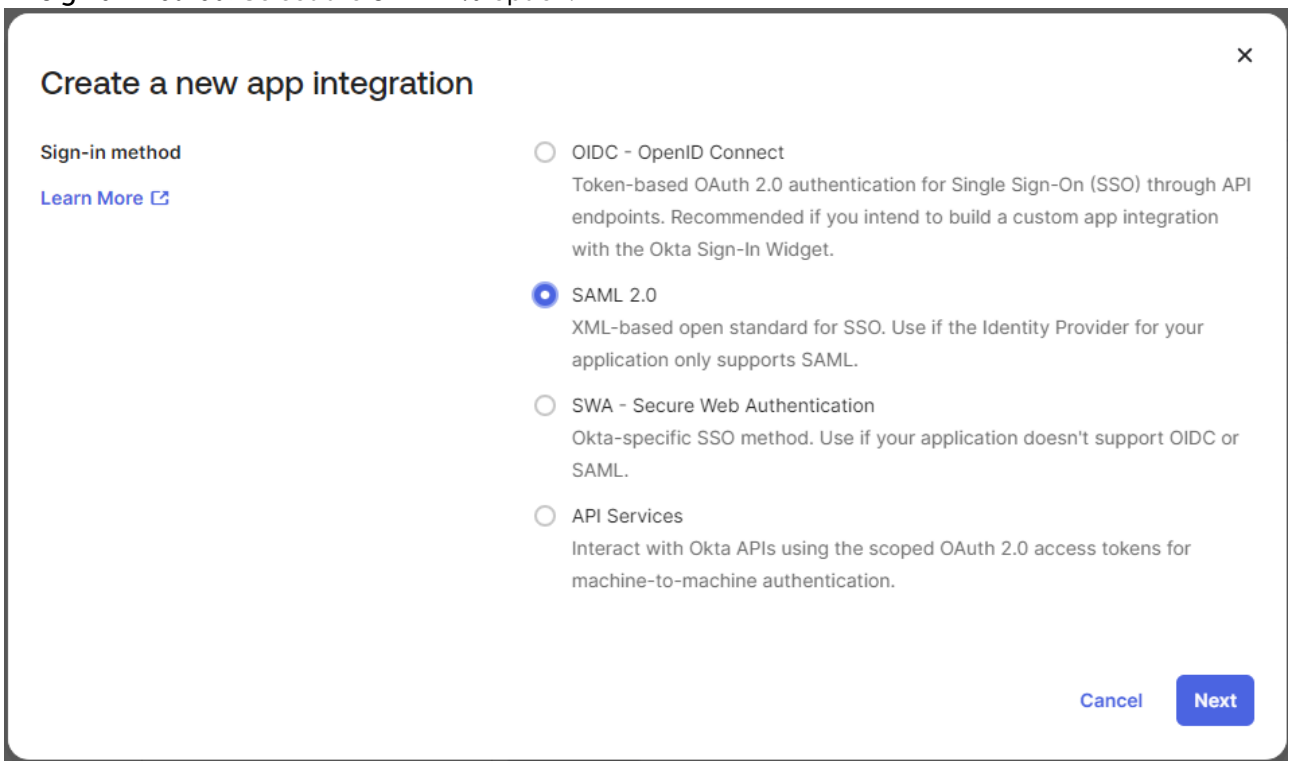


2. Click **Create App Integration.**



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

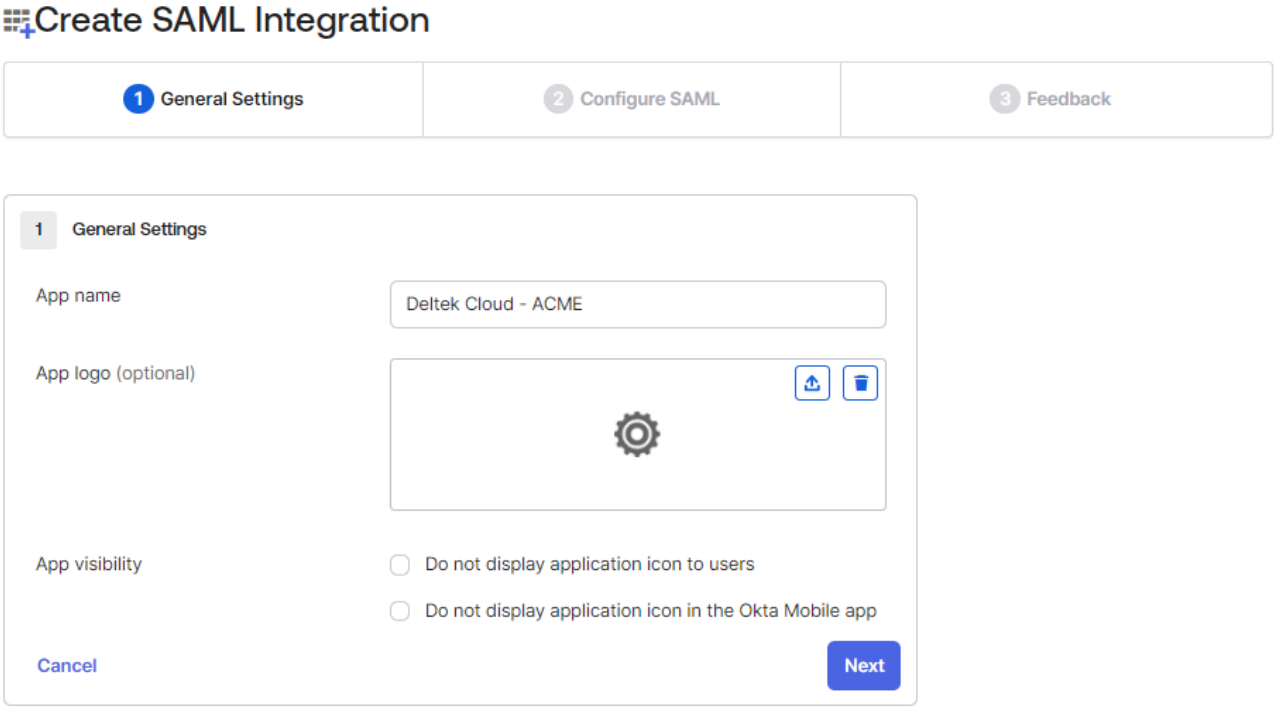
   - **Sign on method**: Select the **SAML 2.0** option.



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

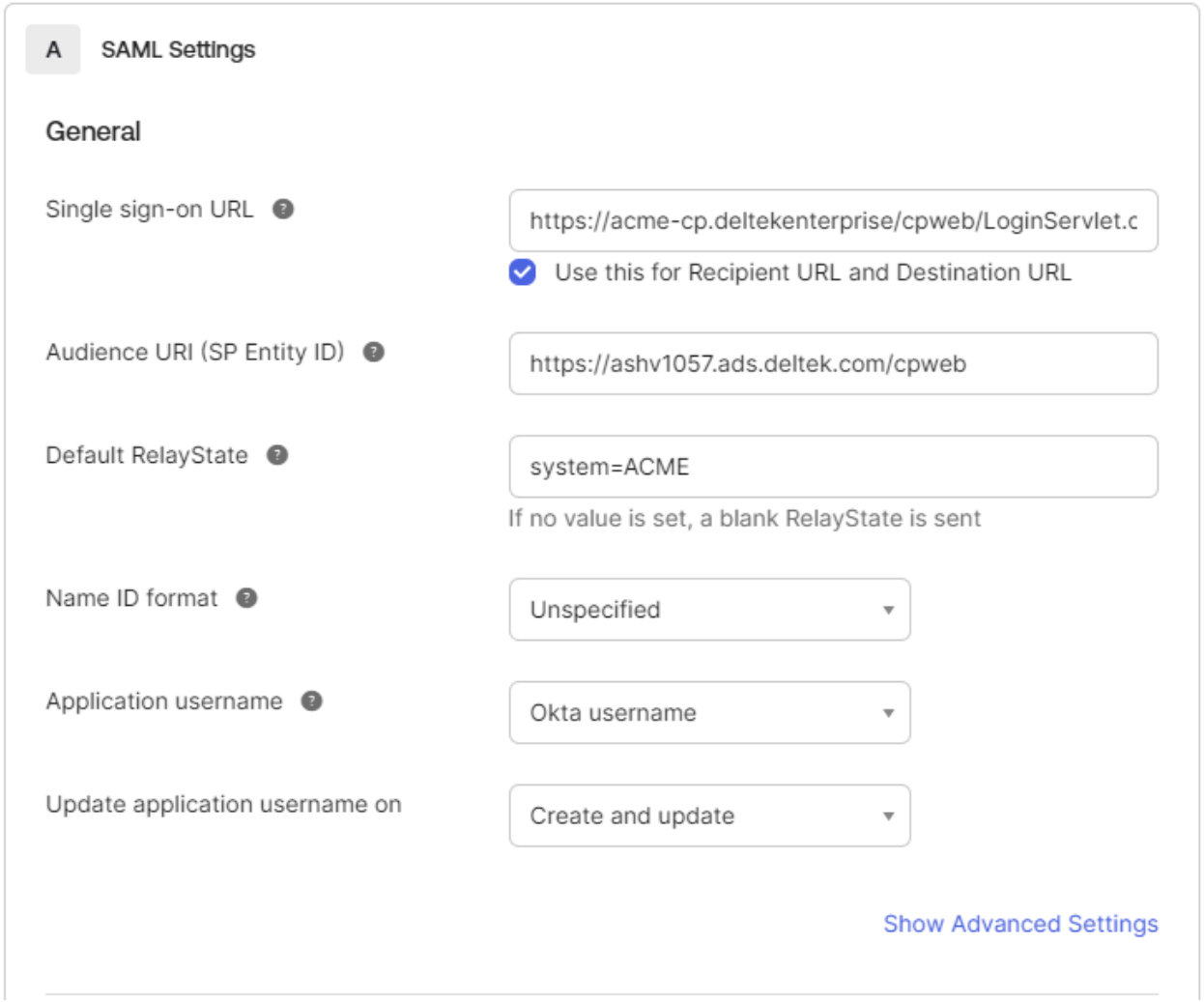
to display the application icon in the Okta Mobile application.



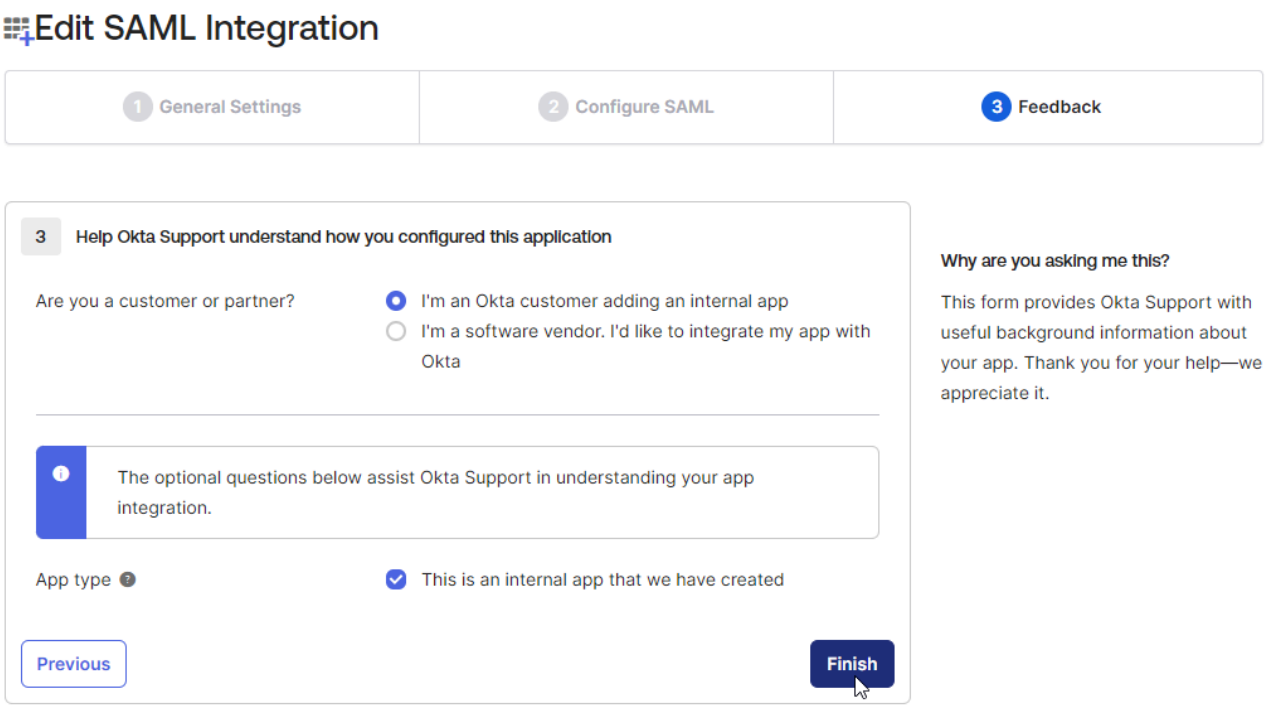
5. On the SAML Settings A screen, complete the following:

> Note: /LoginServlet.cps is required where specified below.

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

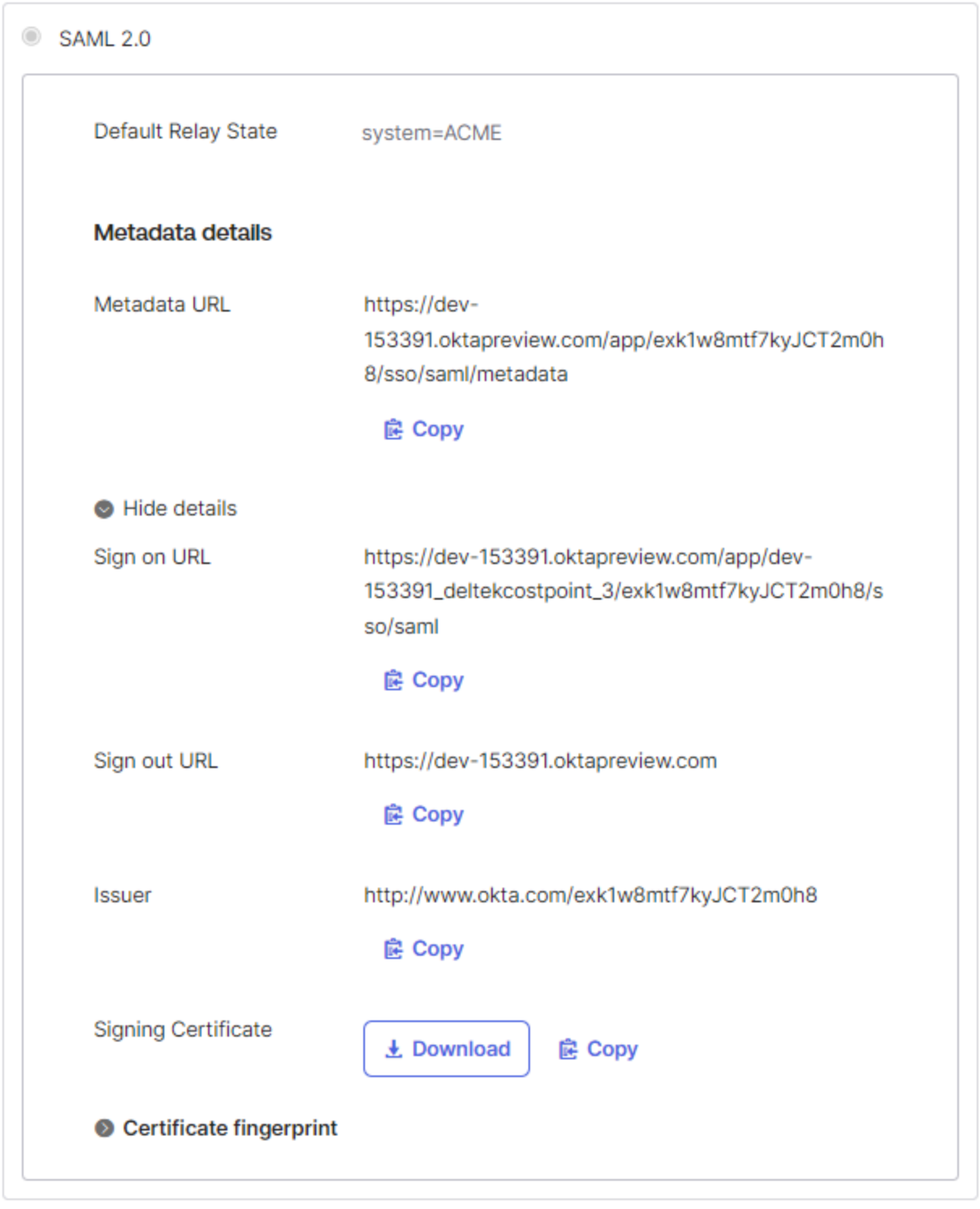

A
SAML Settings
General
Single sign-on URL
https://acme-cp.deltekenterprise/cpweb/LoginServlet.c
Use this for Recipient URL and Destination URL
Audience URI (SP Entity ID)
https://ashv1057.ads.deltek.com/cpweb
Default RelayState
system=ACME
If no value is set, a blank RelayState is sent
Name ID format
Unspecified
Application username
Okta username
Update application username on
Create and update
Show Advanced Settings

6. Click Next.



7. Click Finish.

8. Sample Settings



9. After the application is created, export the IDP metadata as an .XML file or Copy the metadata URL.

   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).

You also need to let the cloud team if your SAML ID Attribute is an email account or a unique identifier like an employee number. Your users will all need to use the same type of attribute.

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.

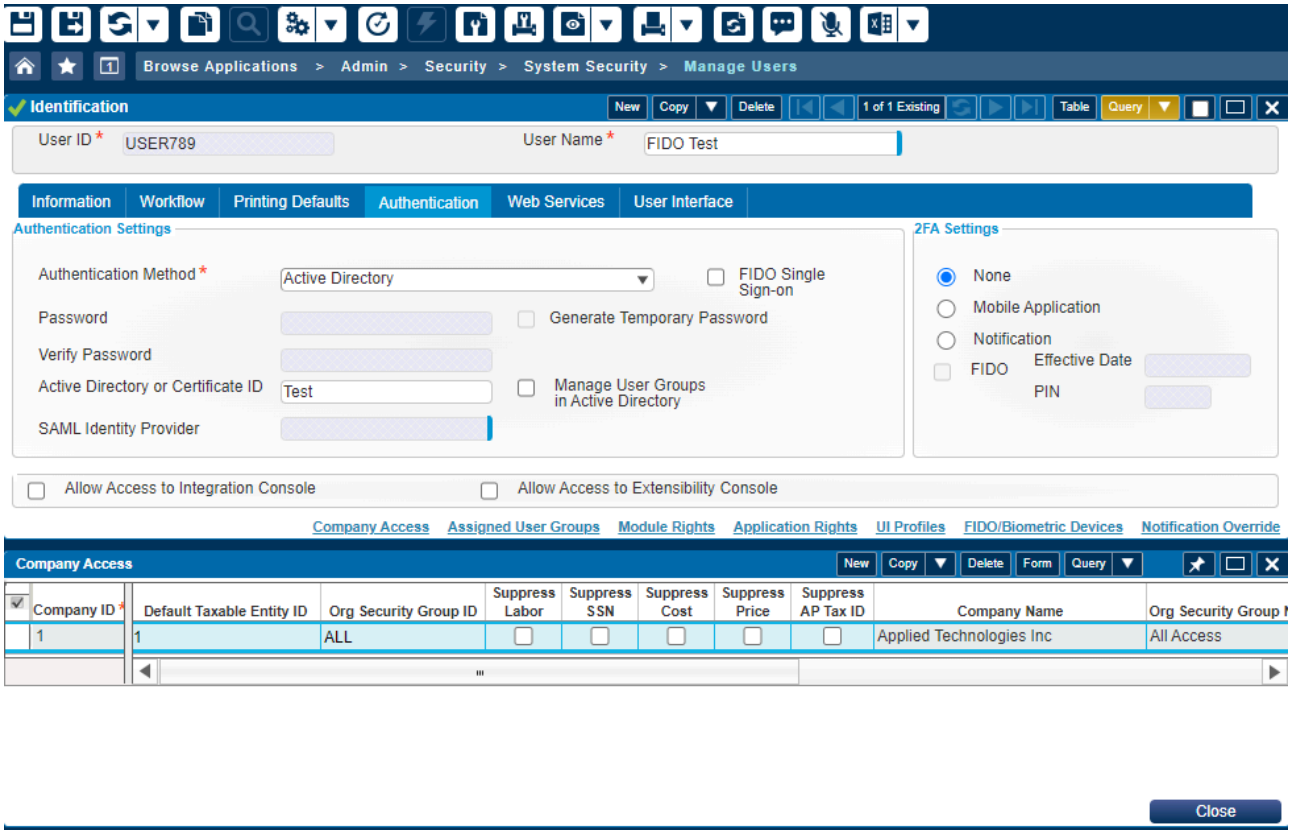
To modify the authentication properties:

1. Primary SaaS Admin will need to login and adjust the authentication properties of your users.

   - **GCCM Customers:** Log into your Costpoint systems using the Primary SaaS Admins SAML Attribute (i.e., the email address(upn) or a unique identifier).
     i. When logging into Costpoint, use the SAML Attribute as the Costpoint Username.
     ii. Developers will need 2 Costpoint accounts in the DEV system, their end user account for testing that uses SAML and a second account that uses Active Directory as the authentication method. The attribute will be clientid.developerfirstname.developerlast name, for example 50053.Mickey.Mouse. You can find more information on setting up the Cloud Active Directory for your developers here).
   - **GCC Customers:** 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 **SAML Single Sign-on**.

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. Save the record.

7. Repeat steps 3 through 6 for each user in each Costpoint system who want to use the Okta authentication.

Logging into the Costpoint User Interface Environments

Here are examples of the client URLs - the ABC needs to be replaced by your client system name.

Development Environment

This environment is used to build your extensions or web services as needed. Be default, Enterprise customers have a Development environment. Essentials customers can request a WebService Integration Console to build webservices.

URL for front end access:

GCC Customers: https://ABC-cpd.deltekenterprise.com/cpweb

GCCM Customers: https://cp-*ABC*01-dev.npr.mydeltekgcc.com/cpweb

System Names: ABCDEV

Non-Production Environment

This environment is used to test your data as it goes into the cloud and for future use to test new functionality or features of future Costpoint releases.

URL for front end access:

GCC Enterprise Customers: https://ABC-cpt.deltekenterprise.com/cpweb

GCCM Customers: https://cp-ABC-tst.npr.mydeltekgcc.com/cpweb

System Names: ABCTEST, ABCCONFIG, ABCSBOX

Production Environment

This environment is used to test your data as it goes into the cloud and for future use to test new functionality or features of future Costpoint releases.

URL for front end access:

GCC Customers: https://ABC-cp.deltekenterprise.com/cpweb

GCCM Customers: https://cp-ABC-prd.mydeltekgcc.com/cpweb

System Names: ABCPROD

Configure Costpoint GCCM Developer Accounts for Citrix Access

Your developers will access Citrix to get to your Dev machine and build extensions or web services. In order for them to authenticate using Okta idP, you must enable the Citrix application in OKTA and assign your developers to the Citrix account.

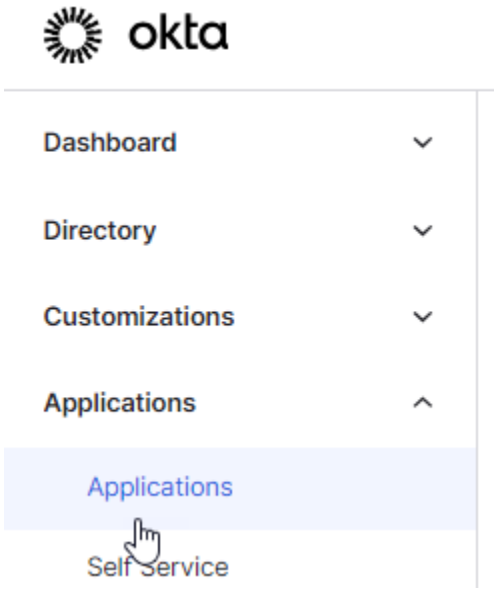
> **Note:** You will need to submit the Service Request for Citrix Access to establish the SAML SSO connectivity with our Citrix, in addition to creating the Citrix Access within Okta.

The Okta idP SAML integration for Costpoint GCCM only supports SP-initiated SSO so the customer must point

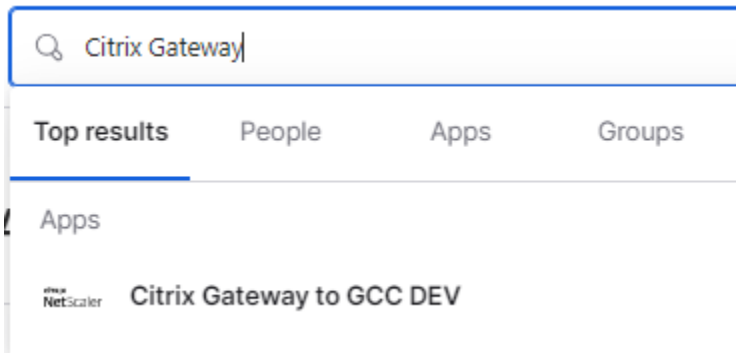
their browser to the Deltek Citrix Gateway URL - https://cp-ctx01.pss.mydeltekgcc.com/ and enter their username and hit enter. This will query Citrix policies and then Active Directory to find a match and redirect to their company OKTA website. Therefore, idP-initiated SSO is not allowed (user going OKTA site first to login).

1. OKTA already has created the Citrix Gateway application and is currently available in the OKTA portal to configure and assign to users.

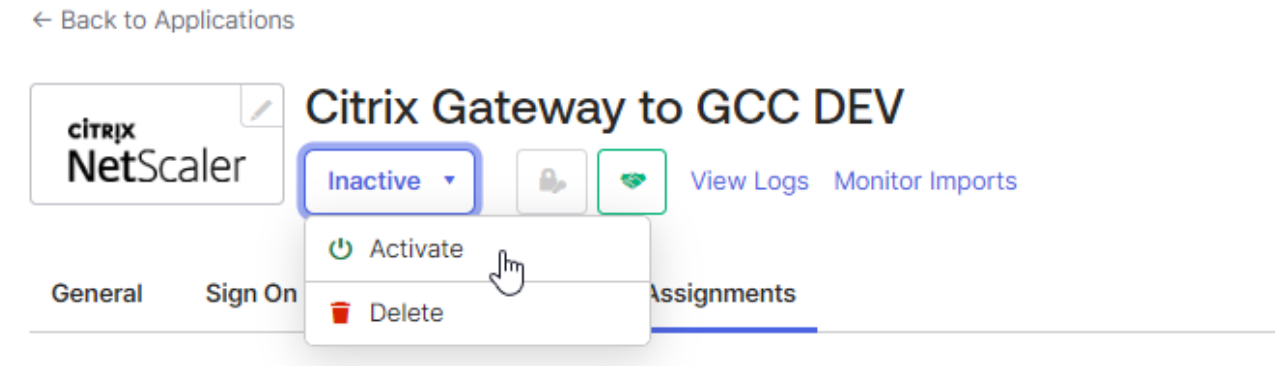
2. Customer must have an OKTA Admin login to the portal and select applications.

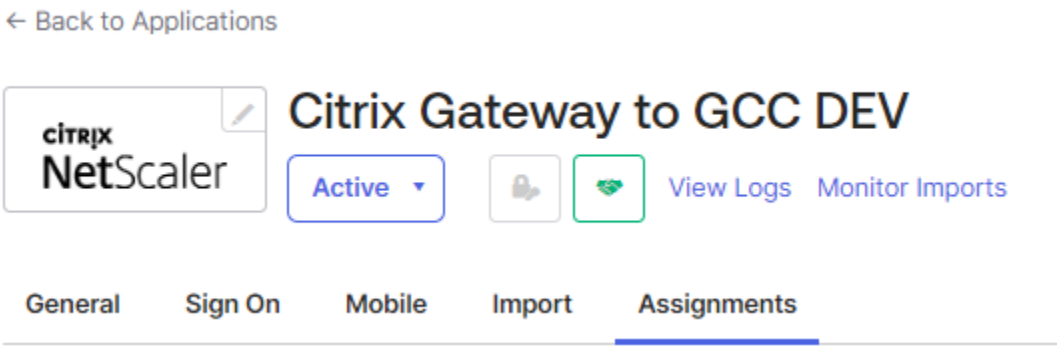


3. Search for Citrix Gateway and select **Citrix Gateway to GCC DEV** button.

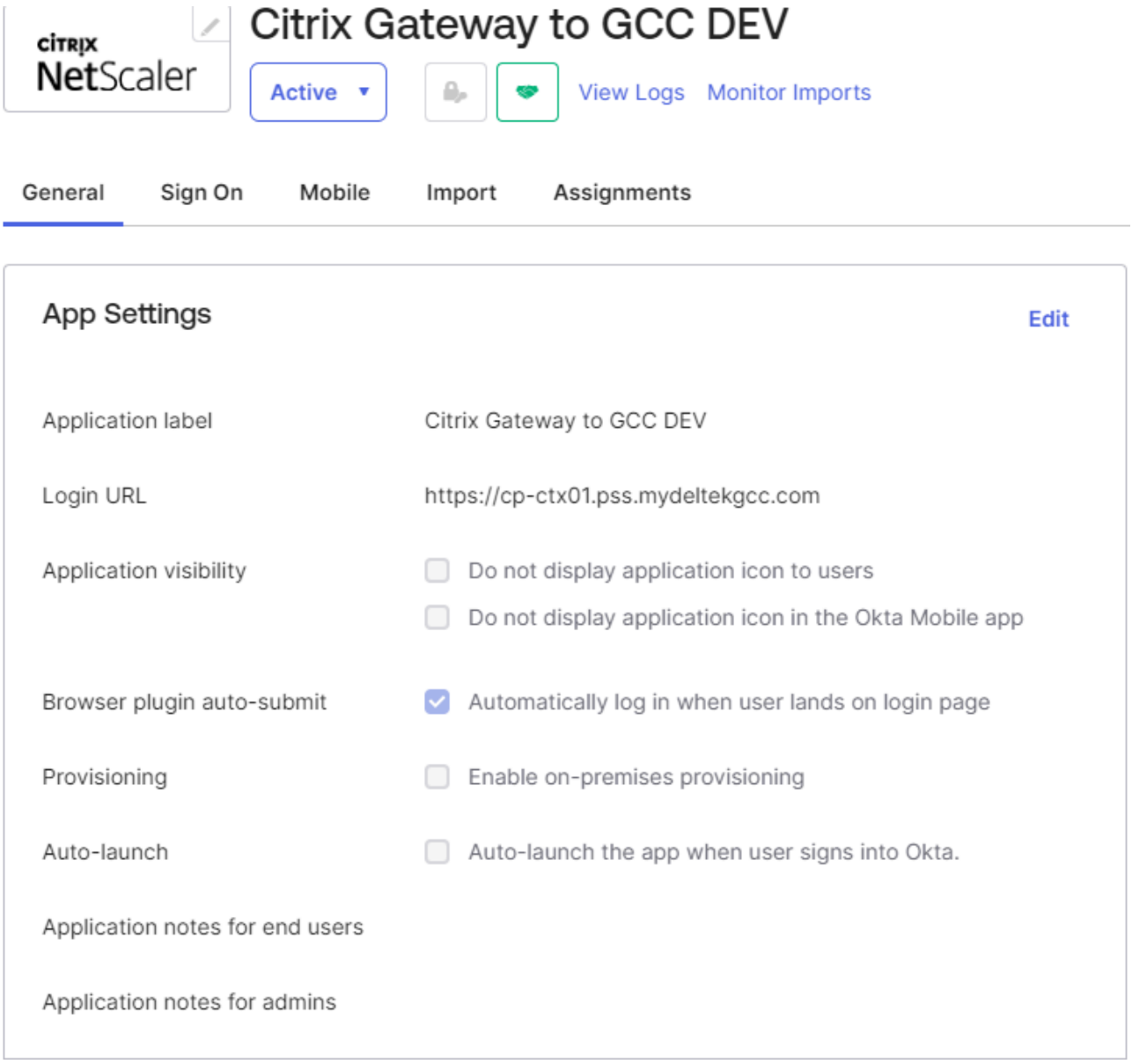


4. Select Inactive and select Activate to activate the application.

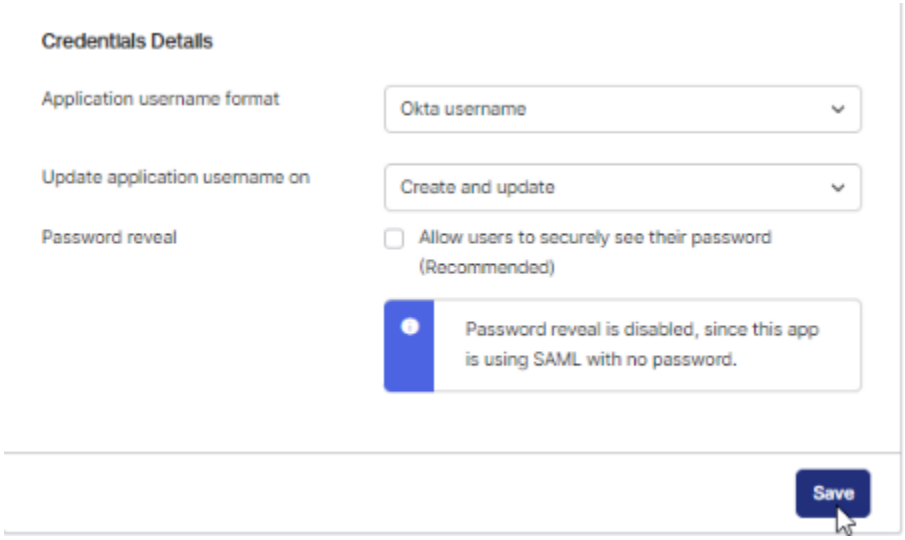


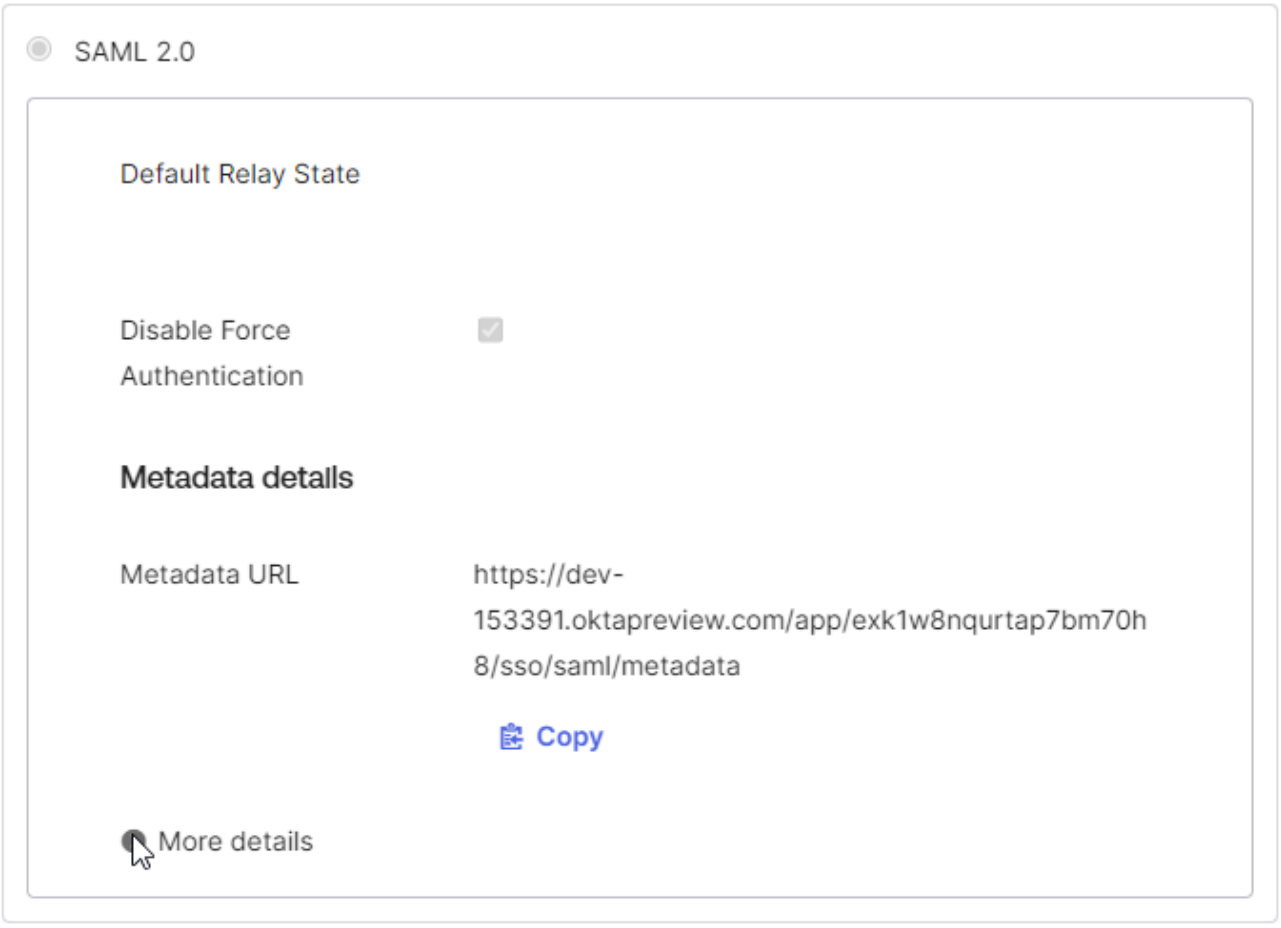


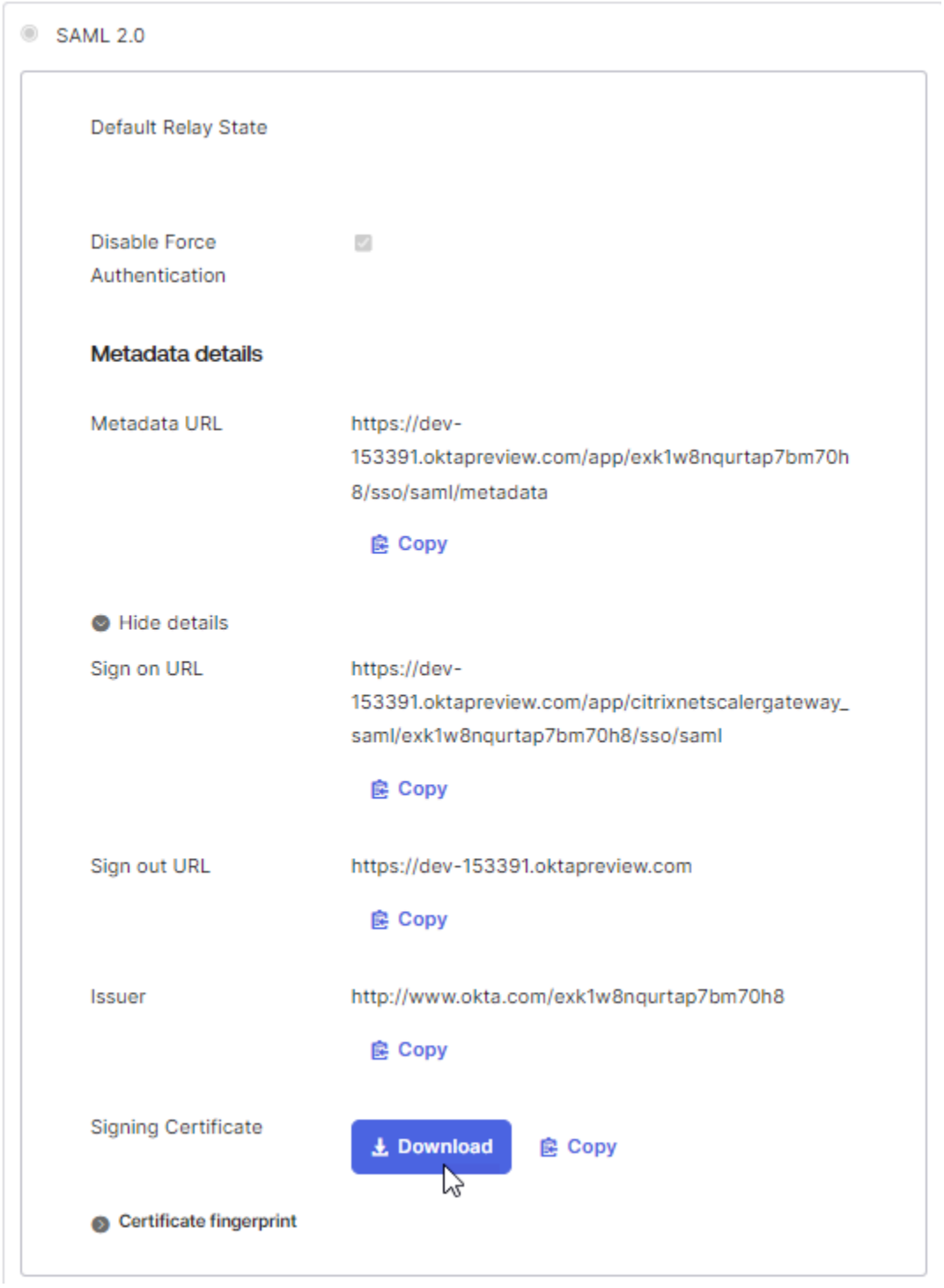
5. Customer must configure their Citrix Gateway application URL to Deltek' s Citrix Gateway - https://cp-ctx01.pss.mydeltekgcc.com by going to General>App Settings>Login URL as shown below section.

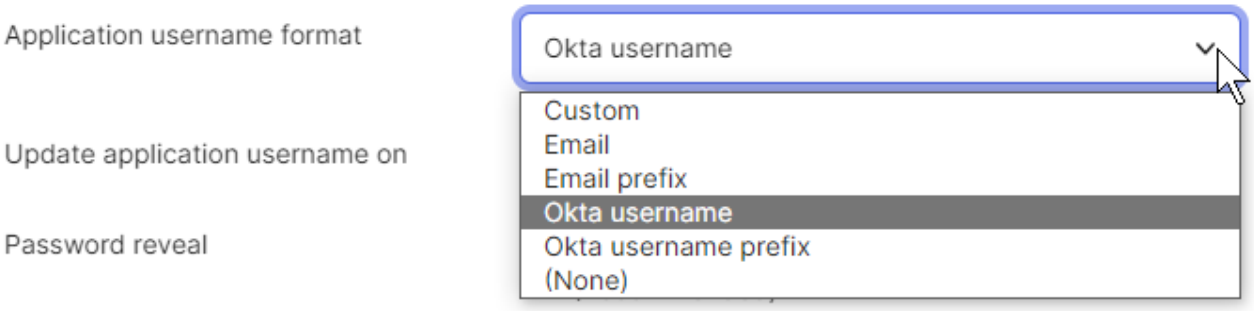


6. Next the customer will need to provide the Sign On method configuration for SAML by going to the Sign On>Settings>Sign on methods>SAML 2.0>Credentials details>Application username format>*default.* This can be changed to other attributes, but this is the default format.


Credentials Details
Application username format
Okta username
Update application username on
Create and update
Password reveal
Allow users to securely see their password (Recommended)
Password reveal is disabled, since this app is using SAML with no password.
Save


SAML 2.0
Default Relay State
Disable Force Authentication
Metadata details
Metadata URL
https://dev-153391.oktapreview.com/app/exk1w8nqurtap7bm70h8/sso/saml/metadata
Copy
More details


SAML 2.0
Default Relay State
Disable Force Authentication
Metadata details
Metadata URL
https://dev-153391.oktapreview.com/app/exk1w8nqurtap7bm70h8/sso/saml/metadata
Copy
Hide details
Sign on URL
https://dev-153391.oktapreview.com/app/citrixnetscalergateway_saml/exk1w8nqurtap7bm70h8/sso/saml
Copy
Sign out URL
https://dev-153391.oktapreview.com
Copy
Issuer
http://www.okta.com/exk1w8nqurtap7bm70h8
Copy
Signing Certificate
Download
Copy
Certificate fingerprint



7. Add your developers into this SAML Application to enable their ability to login to Citrix.

8. The SaaS Admin will need to login to Cloud AD Manager and create an AD account and grant access to DEV Groups.