Deltek

Deltek Costpoint Cloud

Configuring Okta

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Overview

There are five steps to setting up Okta for Deltek Costpoint Cloud:

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Step One: Submit the CAP Cutover Service Request.

Populate the Costpoint User Groups

Note: Cloud customers who are deployed on CER v7.2.1 in the cloud can skip Step One and start with Step Two.

Implementing Okta requires that you change the way your users are authenticated and authorized to use Costpoint Enterprise Reporting (CER). Currently CER users are assigned to security groups within User Manager which identifies their role and Costpoint Systems they have access to when using CER. When implementing Okta you must switch to the new Cognos Authentication Provider (CAP) model. CAP uses Costpoint User Groups for authentication and authorization in CER. CAP supports users regardless of how they are authenticating into Costpoint. CAP will support users who are authenticating using Okta as well as support users authenticating using the Cloud Active Directory.

Deltek has added the following Costpoint User Groups to your Costpoint system. Populate your users into the appropriate groups to identify the user CER functional role and CER database access

If you are operating in the Production Environment you must populate these groups in your PROD system. If you are operating in the Implementation Environment you must choose either your CONFIG or TEST system to populate the groups. You only need to populate the Costpoint User Groups in one of your Costpoint systems.

Costpoint User Group Name	CER Functional Role
CER__ADMIN	CER Cloud Administrator
CER__DEV	CER Developer
CER__ADV	CER Advanced User
CER__USER	CER User

Note: These groups must also be granted access to the ERCOGNOS module in Costpoint.

Populate your users into the appropriate groups to identify which Costpoint systems the users will have access to. Populate the Costpoint Groups in the same Costpoint system (either PROD, CONFIG, or TEST) you selected for the above groups.

Costpoint User Group Name	CER Database Access
CER__DB_SBOX	Sandbox
CER__DB_TEST	Test
CER__DB_CONFIG	Config
CER__DB_DEV	Development
CER__DB_PREV	Preview

Note: All CER Functional Role Groups are granted access to Production database.

Move My Folder Content to Shared Location

All users who have content (that is, custom reports) in their My Folder area must move this content to a shared location. Content in the My Folder location will not be accessible once the CAP Cutover Service Request is completed.

Users can move their content to a shared location by creating a folder in the Public folder area. This new folder can be named whatever the user wants. The user should copy their content from their My Folder to their newly created folder in the Public Folder area. Once you have switched over to CAP you can move your content from the Public Folder area to a different folder.

Submit the CAP Cutover Service Request

Once you have populated your users into the appropriate Costpoint User Groups and you have moved your My Folder content to a shared location you are ready to submit the CAP Cutover Service Request. The CAP Cutover Service Request will require you to identify which Costpoint system CER should reference to find the populated Costpoint User Groups. If you are operating in the Production Environment you should choose PROD. If you are operating in the Implementation Environment you should choose CONFIG or TEST. You only need to populate the Costpoint User Groups in one of these systems.

Step Two: 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.

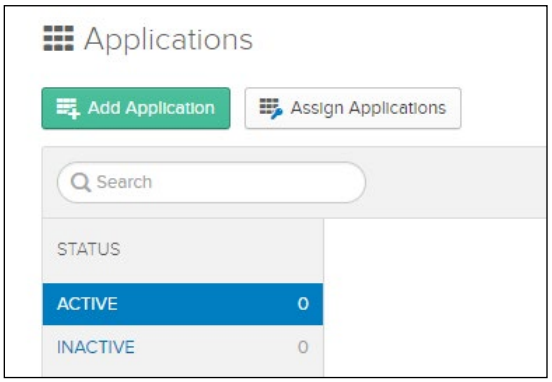
- **Single sign on URL**: For example, **https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps**
- **Recipient URL**: For example, **https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps**
- **Destination URL**: For example, **https://acme-cp.deltekenterprise/cpweb/LoginServlet.cps**
- **Audience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

Note: If you are a Costpoint Foundations or 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.

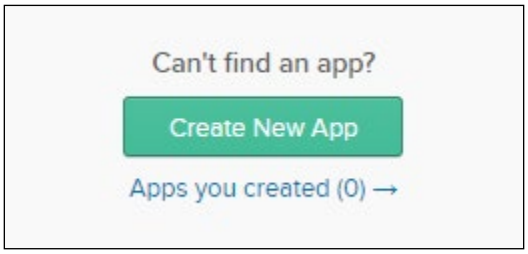
Step Three: Configure Okta

To configure Okta:

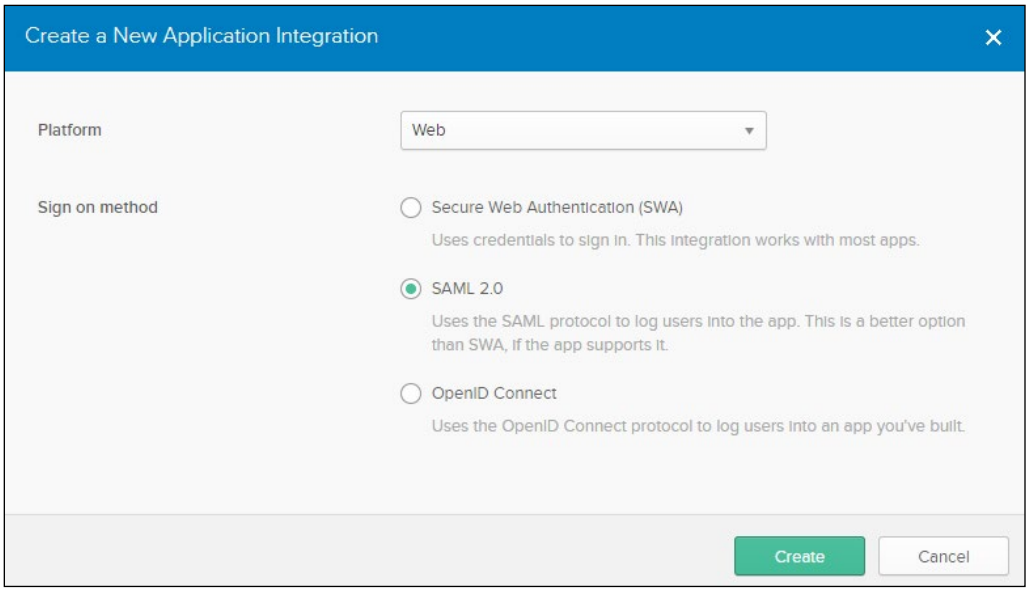
1. Log in to your Okta portal, and click **Add Application**.



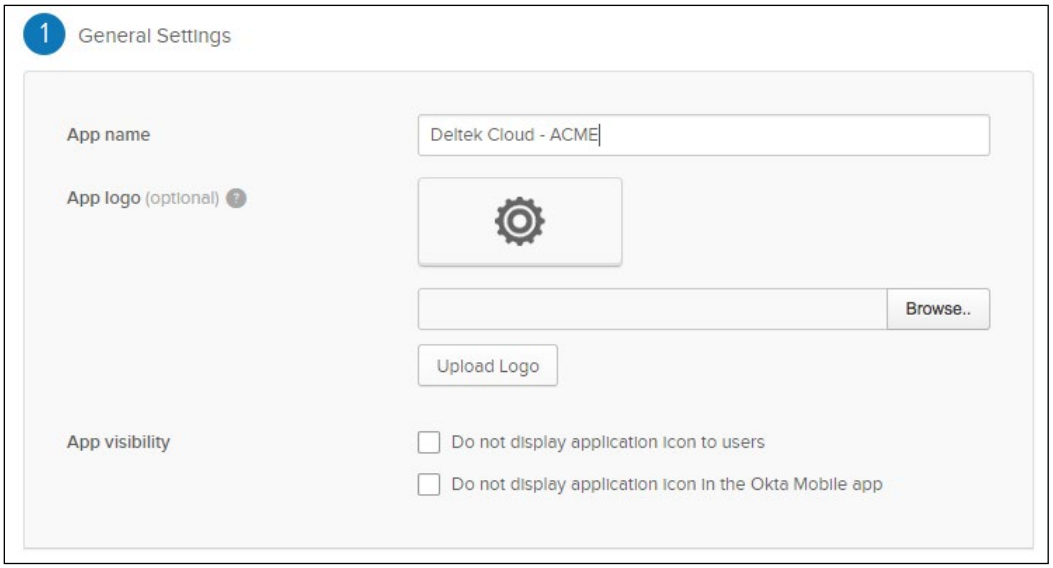
2. Click **Create New App**.



3. In the Create a New Application Integration screen, complete the following, and click **Create**:
   - **Platform**: Select **Web** from the drop-down list.
   - **Sign on method**: Select the **SAML 2.0** option.



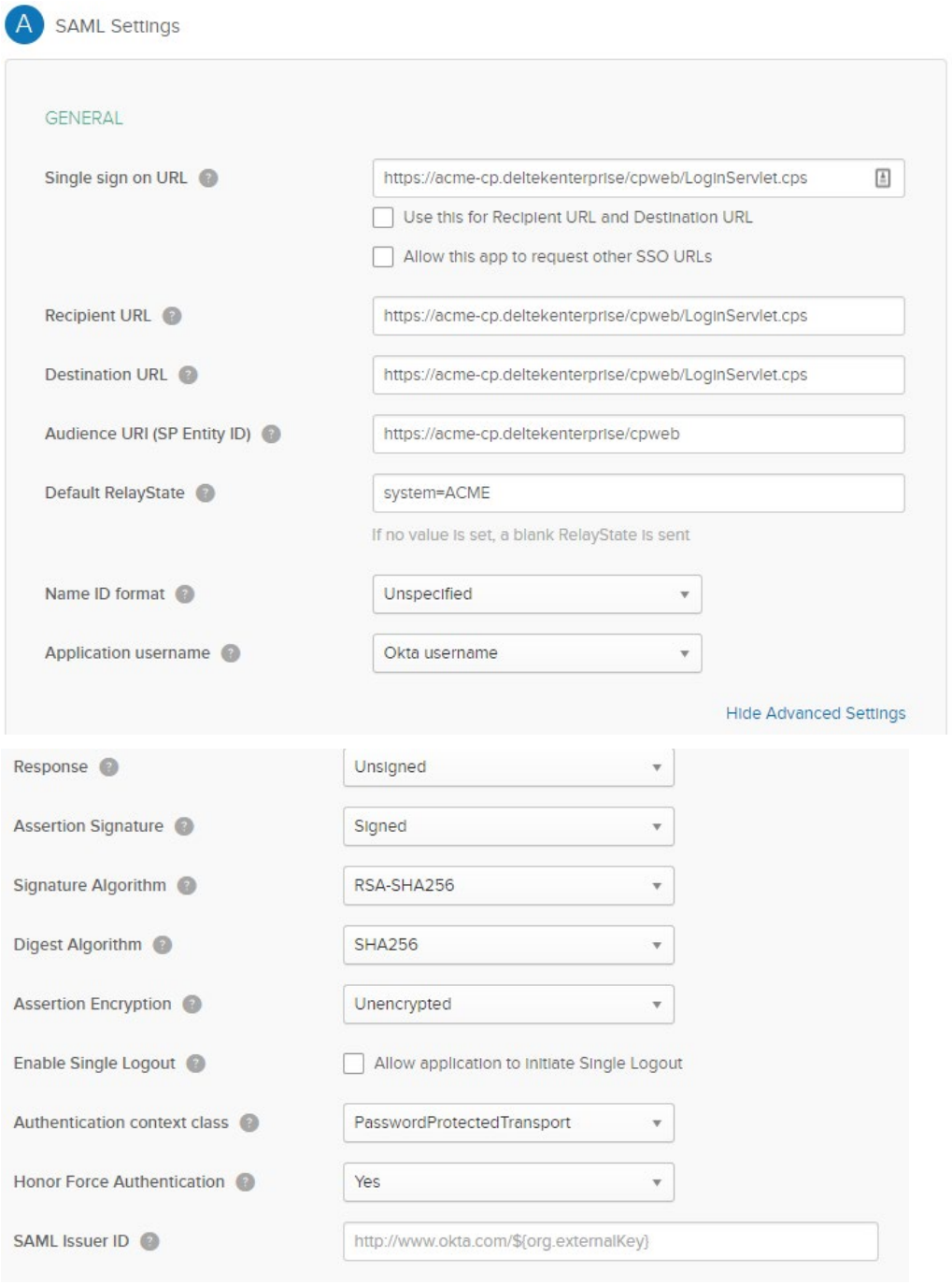
4. Under General Settings, complete the following, and click **Next**:
   - **App name**: Enter any name.
   - **App logo** (optional): If so desired, upload a logo for the app.
   - **App visibility**: Select either check box. You can choose not to display the application icon to users or you chose not to display the application icon in the Okta Mobile app.



5. Under the SAML Settings A, complete the following:

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

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



6. After the application has been created, export the IDP metadata as an .XML file.

   Exporting the file as a **.cert** file is not supported by Costpoint.

> **Important:** Costpoint Enterprise customers should repeat step 3 for each Cloud Environment (Production, Implementation/Test/Preview, Dev) you would like to setup ADFS for.

Step Four: Attach Your Okta XML Certificate to Your SSO Setup Service Request Ticket

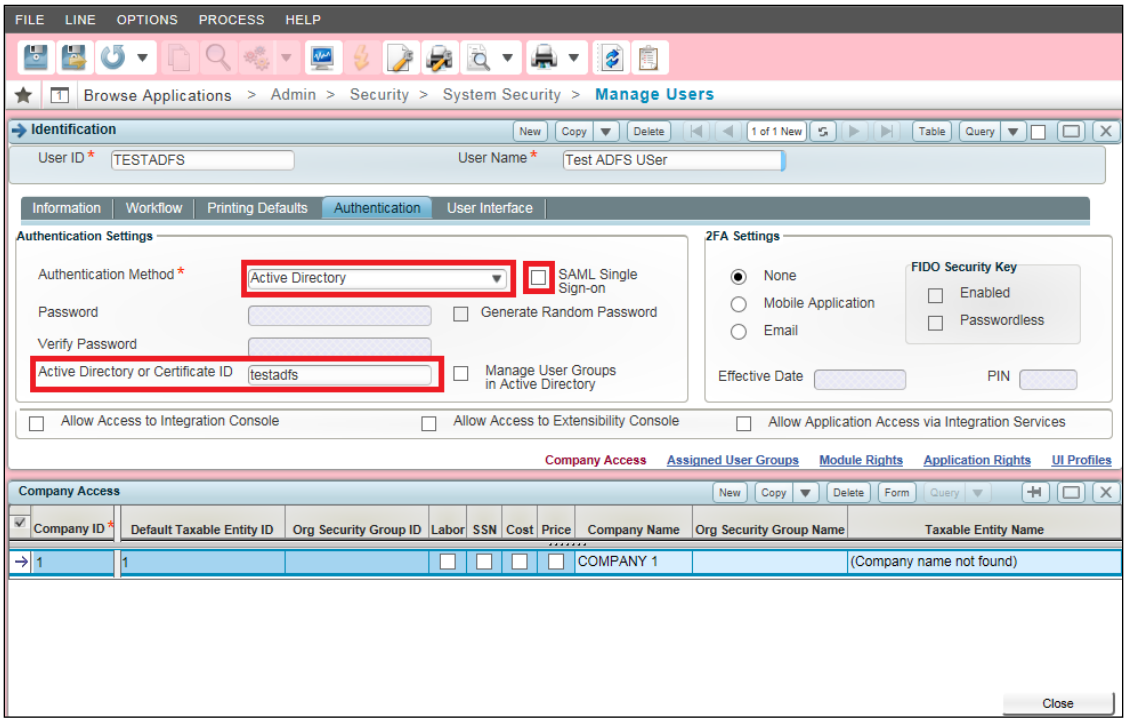
Attach the Okta XML certificate you created in Step 3 to the SSO Setup Service Request ticket you created in Step 2.

Step Five: Configure Costpoint User Accounts to Use Okta for Authentication

In order to log into Costpoint using your newly added credentials, you must first modify the authentication properties of your Costpoint user accounts.

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**.
3. Pull up the account that you'd like to modify, and click the Authentication tab.



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

   This can be just 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 thru 7 for each user in each Costpoint system for whom you want to use ADFS authentication.

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