## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td>1</td>
</tr>
<tr>
<td>About This Manual</td>
<td>1</td>
</tr>
<tr>
<td>Overview</td>
<td>1</td>
</tr>
<tr>
<td>Intended Audience</td>
<td>2</td>
</tr>
<tr>
<td>Text Conventions</td>
<td>2</td>
</tr>
<tr>
<td>Other Documentation</td>
<td>3</td>
</tr>
<tr>
<td><strong>Chapter 1 Key Concepts</strong></td>
<td>5</td>
</tr>
<tr>
<td>Identity Mapping</td>
<td>5</td>
</tr>
<tr>
<td>Account Linking</td>
<td>6</td>
</tr>
<tr>
<td>Linking Permission and “Defederation”</td>
<td>6</td>
</tr>
<tr>
<td>SP Affiliations</td>
<td>6</td>
</tr>
<tr>
<td>Account Mapping</td>
<td>6</td>
</tr>
<tr>
<td>Integration Kits and Adapters</td>
<td>7</td>
</tr>
<tr>
<td>Bundled Adapters</td>
<td>7</td>
</tr>
<tr>
<td>Commercial Adapters</td>
<td>8</td>
</tr>
<tr>
<td>Software Development Kit</td>
<td>8</td>
</tr>
<tr>
<td>About Attributes</td>
<td>8</td>
</tr>
<tr>
<td>Attribute Contracts</td>
<td>9</td>
</tr>
<tr>
<td>Adapter Contracts</td>
<td>9</td>
</tr>
<tr>
<td>Extended Adapter Contract</td>
<td>10</td>
</tr>
<tr>
<td>Data Stores</td>
<td>10</td>
</tr>
<tr>
<td>Attribute Masking</td>
<td>10</td>
</tr>
<tr>
<td>Certificates, SSL, and XML Encryption</td>
<td>11</td>
</tr>
<tr>
<td>Digital Signatures</td>
<td>11</td>
</tr>
<tr>
<td>Message Signing</td>
<td>11</td>
</tr>
<tr>
<td>Signature Validation</td>
<td>12</td>
</tr>
<tr>
<td>Certificate Validation</td>
<td>12</td>
</tr>
<tr>
<td>Digital Signing Policy Coordination</td>
<td>13</td>
</tr>
</tbody>
</table>
## Contents

- Configuring a Default URL and Error Message ........................................... 109
- Viewing Application Endpoints ................................................................. 110
- Viewing Protocol Endpoints .................................................................. 110
- Managing SP Connections ....................................................................... 112
- Accessing Connections ........................................................................ 112
  - Using the Main Menu ........................................................................ 112
  - Using the Manage Connections Screen ........................................... 114
- Configuration Steps ................................................................................. 116
- Choosing a Connection Type .................................................................... 117
- Importing Metadata.................................................................................. 118
- Configuration Steps ................................................................................. 118
- Viewing the Metadata Summary .............................................................. 119
- Choosing Profiles (SAML 2.0) ................................................................. 122
- Assertion Creation .................................................................................. 123
  - Choosing an Identity Mapping Method ........................................... 124
  - Creating an Attribute Contract .......................................................... 126
- IdP Adapter Mapping .............................................................................. 128
- Configuring Web SSO ............................................................................ 147
  - Configuring IdP-Initiated SSO .......................................................... 147
  - Configuring SP-Initiated SSO ............................................................. 148
  - Configuring IdP-Initiated SLO ............................................................. 149
  - Configuring SP-Initiated SLO ............................................................. 149
- SSO/SLO Profile Configuration Steps ......................................................... 150
- Setting Assertion Consumer Service URLs (SAML) ................................ 150
- Setting a Default Target URL (SAML 1.x) ............................................. 152
- Defining a Service URL (WS-Federation) ............................................... 152
- Specifying SLO Service URLs (SAML 2.0) ............................................... 153
- Choosing Allowable SAML Bindings (SAML 2.0) ................................... 154
- Setting an Artifact Lifetime (SAML) ..................................................... 155
- Specifying Artifact Resolver Locations (SAML 2.0) .............................. 156
- Configuring Signature Policy ................................................................. 157
- Configuring XML Encryption Policy (SAML 2.0) .................................... 158
- Editing and Saving Web SSO Configurations ....................................... 159
- Configuring the Attribute Query Profile ............................................... 159
  - Defining Retrievable Attributes ......................................................... 160
  - Choosing a Data Store ...................................................................... 161
  - Configuring Data Store Lookup ......................................................... 161
  - Attribute Mapping Fulfillment ............................................................ 162
- Specifying Security Policy ..................................................................... 163
  - Editing and Saving Attribute Query Configurations .......................... 163
- Configuring Credentials ......................................................................... 164
- Configuring Back-Channel Authentication ............................................ 164
- Configuring Digital Signature Settings ............................................... 167
- Selecting Signature Verification Certificates ........................................ 168
Contents

Importing Metadata .................................................. 212
Importing a Verification Certificate ............................... 212
Viewing the Metadata Summary .................................. 212
General Information .................................................. 212
Choosing Profiles .................................................... 215
Enabling Express Provisioning for WS-Federation ............ 216
User-Session Creation ............................................... 217
Selecting an Identity-Mapping Method ......................... 218
Creating an Attribute Contract ................................. 219
Configuring Adapter Mapping and User Lookup .............. 221
Configuring Web SSO ................................................. 235
Configuring IdP-Initiated SSO ................................ 236
Configuring SP-Initiated SSO ................................ 236
Configuring IdP-Initiated SLO ................................ 237
Configuring SP-Initiated SLO ................................ 237
SSO/SLO Profile Configuration Steps ......................... 238
Specifying SSO Service URLs (SAML) ......................... 238
Specifying a Service URL (WS-Federation) ................... 239
Specifying SLO Service URLs (SAML 2.0) ................. 240
Choosing Allowable SAML Bindings (SAML) .................. 241
Setting an Artifact Lifetime (SAML 2.0) ...................... 242
Specifying Artifact Resolver Locations ....................... 242
Configuring Signature Policy .................................... 244
Configuring XML Encryption Policy (SAML 2.0) ........... 245
Editing and Saving Web SSO Configurations ................. 246
User Provisioning ..................................................... 246
Choosing an Event Trigger ....................................... 247
Selecting Attribute Sources (SAML 2.0) ...................... 247
Identifying the User Repository ................................. 248
Specifying User-Record Location ............................... 249
Specifying a Unique Identifier .................................. 249
Identifying Provisioning Attributes ............................ 250
Mapping Attributes to User Accounts ......................... 251
Error Handling ........................................................ 253
Using the Provisioning Summary Screen ...................... 253
Configuring the Attribute Query Profile ...................... 253
Setting the Attribute Authority Service URL ............... 254
Mapping Attribute Names ....................................... 254
Specifying Security Policy ....................................... 255
Editing and Saving Attribute Query Configurations ........ 255
Configuring Credentials .......................................... 256
Configuring Back-Channel Authentication .................... 256
Configuring Digital Signature Settings ....................... 260
Selecting Signature Verification Certificates ............... 261
Selecting an Encryption Certificate ............................ 262
<table>
<thead>
<tr>
<th>Appendix A</th>
<th>OpenToken Adapter Configuration</th>
<th>271</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Configuring the IdP OpenToken Adapter</td>
<td>273</td>
</tr>
<tr>
<td></td>
<td>Configuring the SP OpenToken Adapter</td>
<td>276</td>
</tr>
<tr>
<td>Appendix B</td>
<td>LDAP Adapter Configuration</td>
<td>279</td>
</tr>
<tr>
<td></td>
<td>Configuring the IdP LDAP Adapter</td>
<td>281</td>
</tr>
<tr>
<td></td>
<td>Configuring the SP LDAP Adapter</td>
<td>284</td>
</tr>
<tr>
<td>Appendix C</td>
<td>Application Endpoints</td>
<td>289</td>
</tr>
<tr>
<td></td>
<td>IdP Endpoints</td>
<td>289</td>
</tr>
<tr>
<td></td>
<td>SP Endpoints</td>
<td>292</td>
</tr>
<tr>
<td></td>
<td>Maintenance Endpoint</td>
<td>297</td>
</tr>
<tr>
<td>Appendix D</td>
<td>Web Service Interfaces</td>
<td>299</td>
</tr>
<tr>
<td></td>
<td>Connection Management Service</td>
<td>299</td>
</tr>
<tr>
<td></td>
<td>Exporting a Connection</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td>Exporting Manually</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td>Using the Connection Service</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td>Importing Connections</td>
<td>301</td>
</tr>
<tr>
<td></td>
<td>Code Sample</td>
<td>301</td>
</tr>
<tr>
<td></td>
<td>Deleting Connections</td>
<td>302</td>
</tr>
<tr>
<td></td>
<td>Code Sample</td>
<td>302</td>
</tr>
<tr>
<td></td>
<td>Cluster Configuration Replication</td>
<td>302</td>
</tr>
<tr>
<td></td>
<td>Code Sample</td>
<td>303</td>
</tr>
<tr>
<td></td>
<td>Validation Disclaimer</td>
<td>303</td>
</tr>
<tr>
<td></td>
<td>SSO Directory Service</td>
<td>303</td>
</tr>
<tr>
<td></td>
<td>Code Example</td>
<td>304</td>
</tr>
<tr>
<td></td>
<td>SOAP Request and Response Example</td>
<td>306</td>
</tr>
<tr>
<td>Appendix E</td>
<td>Using Attribute Mapping Expressions</td>
<td>309</td>
</tr>
<tr>
<td></td>
<td>About OGNL</td>
<td>309</td>
</tr>
<tr>
<td></td>
<td>Enabling/Disabling Expressions</td>
<td>310</td>
</tr>
<tr>
<td></td>
<td>Using the OGNL Edit Screen</td>
<td>312</td>
</tr>
<tr>
<td>Appendix F</td>
<td>Troubleshooting</td>
<td>313</td>
</tr>
<tr>
<td></td>
<td>Data Stores</td>
<td>313</td>
</tr>
<tr>
<td></td>
<td>Installation</td>
<td>314</td>
</tr>
<tr>
<td></td>
<td>Protocols</td>
<td>314</td>
</tr>
<tr>
<td></td>
<td>Server</td>
<td>315</td>
</tr>
<tr>
<td></td>
<td>Glossary</td>
<td>317</td>
</tr>
<tr>
<td></td>
<td>List of Acronyms</td>
<td>323</td>
</tr>
</tbody>
</table>
Preface

About This Manual

This manual provides information about using Ping Identity's PingFederate to deploy a secure Internet single sign-on (SSO) solution based on the latest security and e-business standards.

Overview

The manual consists of:

- Chapter 1, “Key Concepts” — A discussion of central concepts needed to understand secure Internet SSO and PingFederate deployment and administration.
- Chapter 2, “System Administration” — Information about maintaining the PingFederate server and deployment, using log files, managing users, and handling other administrative functions.
- Chapter 3, “System Settings” — How to configure your local PingFederate server settings.
- Chapter 4, “Security Management” — Information about importing, exporting, and maintaining certificates and keys in PingFederate.
- Chapter 5, “Identity Provider Configuration” — How to configure PingFederate to act as an Identity Provider (IdP) and establish connections to Service Providers.
- Chapter 6, “Service Provider Configuration” — How to configure PingFederate to act as a Service Provider (SP) and establish connections to Identity Providers.
- Appendix A, “OpenToken Adapter Configuration” — How to configure PingFederate to use the packaged OpenToken Adapter for interfacing with your Web applications.
• Appendix B, “LDAP Adapter Configuration” — How to configure PingFederate to use the packaged LDAP Authentication Adapter.

• Appendix C, “Application Endpoints” — Detailed information about using PingFederate connection endpoints for Web single sign-on and single logout.

• Appendix D, “Web Service Interfaces” — Information developers can use to automate connection-configuration management and runtime SSO partner discovery.

• Appendix E, “Using Attribute Mapping Expressions” — How to enable and use expressions in conjunction with mapping attributes.

• Appendix F, “Troubleshooting” — Solutions for difficulties that may be encountered.

• Glossary — Definitions of terms used in the manual and in identity federation parlance.

• List of Acronyms

Intended Audience

This manual is intended for security and network administrators and other IT professionals responsible for identity management among business entities, both internal and external.

Note: The information in this manual is presented from the viewpoint of an administrative user with full permissions (see “Account Management” on page 36).

Text Conventions

This document uses the text conventions identified below.

Table 1: Text Conventions

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Width</td>
<td>Indicates text that must be typed exactly as shown in the instructions. Also used to represent program code, file names, and directory paths.</td>
</tr>
<tr>
<td>Blue text</td>
<td>Indicates hypertext links.</td>
</tr>
<tr>
<td>Italic</td>
<td>Used for emphasis and document titles.</td>
</tr>
<tr>
<td>▶ [text]</td>
<td>Used for procedures where only one step is required.</td>
</tr>
<tr>
<td>Sans serif</td>
<td>Identifies descriptive text on a user-interface screen. Example: “Print Document dialog”</td>
</tr>
<tr>
<td>Sans serif bold</td>
<td>Identifies menu items, navigational links, or buttons. For example: Click Save.</td>
</tr>
</tbody>
</table>
Other Documentation

Unless otherwise noted, the documents listed below are located in your PingFederate installation’s pingfederate/docs directory.

Tip: PingFederate provides context-sensitive online Help. Click Help in the upper-right portion of the administrative console for immediate, relevant guidance and links to related information.

**Getting Started** – Provides an introduction to secure Internet SSO and PingFederate, including background information about federated identity management and standards, product installation instructions, and a primer on using the PingFederate administrative console.

**Quick-Start Guide** – Provides instructions for deploying a preconfigured PingFederate server to run with example Web applications. Ping Identity recommends that you follow this Guide as a first step to establishing a simple identity federation between two Web applications and to familiarize yourself with PingFederate. The Guide is located in the quickstart/docs directory.

**Integration Overview** – A high-level description of options available for integrating identity-management systems and applications with PingFederate.

**Server Clustering Guide** – Describes how to deploy PingFederate in a cluster to increase throughput and availability.

**SDK Developer's Guide** – Provides technical guidance for using the Java Software Developer Kit for PingFederate version 4 and higher. This Guide is located in the pingfederate/sdk directory.

**Web Resources** – Ping Identity continually updates its Web site with general and technical information in the form of White Papers, FAQs, Tech Notes, and other resources—www.pingidentity.com.

PingFederate documents may include hypertext links to Web sites that provide installation instructions, file downloads, and reference documentation. These links were tested prior to publication, but they may not remain current throughout the life of these documents. Please contact Ping Identity Support (support@pingidentity.com) if you encounter a problem.
Key Concepts

This chapter provides background and preparation information to help you understand and use PingFederate:

- “Identity Mapping” on page 5
- “Integration Kits and Adapters” on page 7
- “About Attributes” on page 8
- “Certificates, SSL, and XML Encryption” on page 11
- “Federation Planning Checklist” on page 16
- “Using Auto-Connect” on page 19
- “User Provisioning” on page 22

Tip: For an introduction to secure Internet single sign-on (SSO), federated identity management, and PingFederate product features, see the Getting Started book in the pingfederate/docs directory.

Identity Mapping

Identity mapping is at the core of identity federation. One of the primary goals of the Security Assertion Markup Language (SAML) is to provide a way for an identity provider (IdP) to send a secure token (the assertion) containing user-identity information that a service provider (SP) can translate, or map, to local user stores. (For more information about SAML, see the “Supported Standards” chapter in Getting Started.)

PingFederate enables two modes of identity mapping between domains:

- Account Linking
- Account Mapping
Chapter 1  
Key Concepts

Account Linking

Under the standards, account linking can be used in cases where each domain maintains separate accounts for the same user. Account linking uses the SAML assertion to create a persistent association between these distinct user accounts. The account link, or name identifier, may be either a unique attribute, such as an email address, or a pseudonym generated by the IdP to uniquely identify individual users. Pseudonyms can be used when privacy is a concern; they cannot easily be traced back to a user's identity at the partner site.

During the user's first SSO request, the SP prompts for local credentials, which enables the SP to link the name identifier contained within the assertion—either an open attribute or a pseudonym—with the user's local account. Subsequent SSO events will not prompt the user to authenticate with the SP, since the SP federation server keeps a table associating remote users' name identifiers with local user accounts. The SP associates the link to the user's corresponding local account and provides access to the account without separate authentication.

Optionally, additional attributes may be sent with the name identifier. When a pseudonym is used as the account link, however, care must be taken to send only general attributes (a user's organizational role or department, for example) that will not compromise privacy.

Linking Permission and “Defederation”

The SAML specification also allows the SP application to build in user verification and approval of account linking and provides a means for the user to permanently cancel the linking, known as defederation (see “sp/defederate.ping” on page 296). A user who has defederated may later elect to reassociate with a local user account.

SP Affiliations

Under the SAML 2.0 specifications, an IdP can configure PingFederate to enable a group of SPs—an SP affiliation—to share the same persistent name identifier (see “Defining SP Affiliations” on page 185). This capability facilitates the use case in which a number of business partners have an existing relationship and sharing a single name identifier among all parties reduces the federation integration effort.

Account Mapping

Account mapping (also called “attribute mapping”) enables an SP to use PingFederate to perform a user lookup and map a user's identity dynamically based on one or more attributes received in the assertion. The attributes used to look up the user are always “exposed”; that is, they are known to both the IdP and SP. An email address, for example, is a commonly used identifying attribute.

Account mapping can be used to achieve one-to-one mapping (individual user accounts exist on both sides of federated connection) or many-to-few (IdP users without accounts at destination sites may be mapped to guest accounts or to a role-based general account).
**Integration Kits and Adapters**

Transient identifiers provide an additional level of privacy—virtual anonymity—by generating a different opaque ID each time the user initiates SSO. Transient IDs are often used in conjunction with federation role mapping, whereby the user is mapped to a guest account or to a role-based account based on the user’s association with the IdP organization rather than personal attributes.

As with pseudonyms, additional attributes may be sent with the transient identifier. Again, care should be taken to preserve privacy.

Account mapping is commonly implemented in B-to-B or B-to-E use cases where it might be appropriate for the administrator to create a user lookup on behalf of the user.

---

**Integration Kits and Adapters**

As a stand-alone server, PingFederate must be programmatically integrated with end-user applications and identity management (IdM) systems to complete the “first- and last-mile” implementation of a federated identity network.

*Note:* For more information, see the PingFederate Integration Overview in the pingfederate/docs directory.

For an IdP (the first mile), this integration process involves providing a mechanism through which PingFederate can look up a user’s current authenticated session data (for example, a cookie) or authenticate a user without such a session. For an SP, the last mile involves enabling PingFederate to supply information needed by the target application to set a valid session cookie or other application-specific security context for the user.

To enable both sides of this integration, PingFederate provides bundled and commercial integration kits, which include adapters that plug into the PingFederate server and agent toolkits that interface with local IdM systems or applications.

PingFederate includes a robust software development kit (SDK), which software developers can use to write their own adapters for specific systems. Adapters can be written to retrieve attributes from custom data stores, connect to application- or IdM-specific user authentication systems, or provide complex attribute transformations or processing.

**Bundled Adapters**

PingFederate packages two adapters:

- An OpenToken Adapter, which provides a generic interface for integrating with various applications, including Java- and .NET-based applications (see “OpenToken Adapter Configuration” on page 271)
- An LDAP Authentication Service, which interfaces with LDAP v3-compliant directories (see “LDAP Adapter Configuration” on page 279)
Chapter 1
Key Concepts

Commercial Adapters

Ping Identity regularly develops integration kits, including adapters, to work with applications and leading identity management systems. Available kits are posted on our Web site at www.pingidentity.com.

Software Development Kit

The PingFederate SDK provides a flexible means of creating custom integration kits to integrate federated identity management into your system environment. See the PingFederate SDK Developer’s Guide in the /sdk directory for more information.

About Attributes

Federation transactions require, at a minimum, the transmission of a unique piece of information (such as an email address) that identifies the user for identity mapping between security domains.

In addition to attributes used for identity mapping, the IdP can pass other user attributes in an assertion. This supplemental information can be used by the SP for several purposes. For example, attributes may be used to map and authorize the user into a specific role, with associated site permissions. In other cases, attributes may be used to customize the end application display for a more robust user experience.

The SP also has the option of incorporating additional attributes prior to creating a session for the target application. This is commonly done where the SP also maintains an account for the user and wants to pass additional information for profiling or access-policy purposes.

Attributes must be carefully managed between IdPs and SPs. PingFederate facilitates the process by providing configuration steps that enable administrators to:

- Define and enforce attribute contracts for each partner connection.
- Define and retrieve attributes from the adapter to populate an attribute contract directly or use these attributes to look up additional attributes in IdP data stores (see “Creating an Attribute Contract” on page 126).
- Define and enforce a set of required attributes needed by SP adapters to interface local systems or applications (see “Adapter Contracts” on page 9).
- Set up connections to local data stores (see “Data Stores” on page 10).
- Configure specific attribute sources and lookups—based on the data stores—and map attributes into IdP assertions or into SP adapters used to interface target applications (see “Integration Kits and Adapters” on page 7).
- Selectively mask attribute values recorded in transaction logs (see “Attribute Masking” on page 10).
Attribute Contracts

An attribute contract represents an agreement between an SP and an IdP about user attributes sent in an assertion. The contract is a list of case-sensitive attribute names. IdPs and SPs must configure attribute contracts to match.

Tip: When privacy is required for sensitive attributes, you can configure PingFederate to mask their values in log files (see “Attribute Masking” on page 10).

For an IdP, the attribute contract defines which attributes PingFederate sends in an assertion. While this contract is fixed for all users authenticating to the SP partner, the values used to fulfill the contract may differ from one user to the next. The attribute contract may be fulfilled by relying on three different sources of data:

- An IdP attribute source, which identifies the location of individual attributes in a data store (see “Configuring Attribute Sources and User Lookup” on page 131)
- The IdP adapter (see “Configuring IdP Adapters” on page 104)
- Static text values for some attributes, or text values combined with variables (see “Attribute Contract Fulfillment” on page 141)

For an SP, the attribute contract defines the attributes PingFederate expects in an SSO assertion. PingFederate can be configured to pass these attributes to the SP adapter (see “Configuring SP Adapters” on page 194). You can also use attributes to look up additional attributes in local data stores, which may be needed to start a user session (see “Adapter Contracts” below).

The attribute contract must contain the attribute SAML_SUBJECT, the primary information used to identify the user, unless you are using account linking. This attribute is automatically included when creating a new contract.

Note: You create attribute contracts on a per-connection basis. For example, if an SP has deployed two session creation adapters for two separate applications, a single attribute contract can be created for the IdP connection partner. This single contract would be constructed to supply all the attributes needed by both SP adapters.

Adapter Contracts

An adapter contract represents an agreement between the PingFederate server and an external application. In concert with the attribute contract between partners, adapter contracts specify the transfer of attributes. Adapter contracts consist of a list of case-sensitive attribute names.

On the IdP side of a federation, adapter attributes are supplied to PingFederate by an IdP adapter (see “Integration Kits and Adapters” on page 7 and “Configuring IdP Adapters” on page 104).
On the SP side, adapter contract attributes are those required by an adapter to start a session with an application. At least one adapter type is needed for each security domain. Then an adapter instance must be configured for each target application. (See “Configuring SP Adapters” on page 194.)

Adapter contracts on the SP side are fulfilled using attributes from the attribute contract, possibly enhanced through other attributes looked up from local data stores. For example, if several target applications are controlled by the same security context (for example, SiteMinder) and can receive the same set of attributes to start a session for the user, you would deploy an adapter type and configure an adapter instance for each protected application (see “Configuring Adapter Mapping and User Lookup” on page 221).

**Extended Adapter Contract**

Adapter contracts are created when the developer deploys an adapter type with PingFederate. At the time of deployment, these adapters are “hard-wired” to look up or set a specific set of attributes. After deployment, your attribute requirements may change. To streamline adjustment of adapter contracts, PingFederate allows an administrator to add additional attributes to the adapter instance through the administrative console. These adjustments are called extended attribute contracts.

**Data Stores**

PingFederate can be configured to use local data stores to supply attributes for either the IdP’s attribute contract or SP’s adapter contract (see sections above). Standard data stores may include any JDBC-accessible database or an LDAP v3-compliant directory server (see “Managing Data Stores” on page 70).

Alternatively, you can use the PingFederate Custom Source SDK to create your own driver for non-JDBC/LDAP data stores—including, for example, flat files or SOAP-connected databases (see the PingFederate SDK Developer’s Guide in the pingfederate/sdk directory).

Data stores can be used across multiple connections.

**Attribute Masking**

At runtime PingFederate logs user attributes (see “Log File Generation” on page 27). To preserve user privacy, you may wish to mask the values of logged attributes.

PingFederate provides this masking capability at all points where the server logs attributes. These points include:

- Data-store lookup at either the IdP or SP site (see “Managing Data Stores” on page 70).
- Retrieval of attributes from an IdP adapter (see “Setting Pseudonym Values and Masking” on page 108).
Certificates, SSL, and XML Encryption

- SP-server processing of incoming attributes based on the SSO Attribute Contract, (see "Creating an Attribute Contract" on page 219).

Note that the SAML Subject ID is not masked: the SAML specifications provide for either pseudonymous account linking or transient identification to support privacy for the Subject ID (see “Account Linking” on page 6).

- SP-server processing of incoming attributes in response to an Attribute Request under XASP (see “Specifying Security Policy” on page 255).

For information about XASP, see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started.

Important: Many adapter implementations, as well as other product extensions, may independently write unmasked attribute values to the PingFederate server log. These implementations are beyond the control of PingFederate. If sensitive attribute values are a concern when using such a component, a system administrator can adjust the component’s logging threshold in log4j.xml to prevent the recording of attributes (see “Log File Generation” on page 27).

Certificates, SSL, and XML Encryption

This section describes the PingFederate security infrastructure that supports encrypted messaging, certificates, and digital signing. These functions are integrated into PingFederate’s configuration screens to provide complete control over certificate generation and authentication verification (see “Security Management” on page 87).

Digital Signatures

A digital signature is a way to verify the identity of a person or entity who originates an electronic document and ensure that the message has not been altered. Digital signatures are used in both SAML and WS-Federation electronic documents.

Handling a digital signature involves message signing, signature and certificate validation, and signing-policy coordination between connection partners.

Message Signing

Certificates contain information about the owner of the certificate along with a public key. Applying a digital signature creates and encrypts a hash from the message you are signing, using your private key.

To ensure the integrity of SAML messages, we recommend digital signing practices, using public/private keypairs in conjunction with X.509 certificates.

Note: Digital signatures do not encrypt the contents of a message; SSL/TLS and/or XML encryption is used for this purpose.
The certificate should be signed by a Certificate Authority (recommended), but it can be self-signed or signed by an untrusted third party. After generating a keypair and a self-signed certificate, you can use PingFederate to create a Certificate Signing Request (CSR) and send it to a CA for signing. After the CA has generated a Certificate Signing Response, you can import it into PingFederate’s certificate management system. (The CA’s certificate must be in PingFederate’s trusted store.)

PingFederate enables signing and validation of responses, requests, and/or the assertion message. In addition, PingFederate provides for certificate generation, import and export functionality, CSR generation, and application of digital signatures. You can create reusable global signing certificates across your federated connection base and import signature verification certificates for each partner (see “Digital Signing and Decryption Keys & Certificates” on page 94).

**Note:** Ping Identity recommends generating unique certificates for each connection, which limits your exposure if your private key becomes compromised.

### Signature Validation

After receiving a signed message, PingFederate verifies the signature using the public key that corresponds with the private key used to sign the message. Verification involves creating a hash of the received message, using the signing partner’s public key to decrypt the hash sent with the original message, and verifying that both hash values are equal.

### Certificate Validation

PingFederate always checks certificates to see if they have expired, both when they are initially imported and at runtime when they are used to encrypt, decrypt, and digitally sign or verify assertions.

PingFederate can also check to see whether a certificate has been revoked, using either Certificate Revocation Lists (CRLs) or the Online Certificate Status Protocol (OSCP). Depending on the content of the certificate in question and your requirements, the server can perform either of these checks during SSO or SLO processing.

If a certificate is expired or revoked, the associated SSO or SLO transaction fails at runtime and an error is written to the transaction log. In the administrative console, an expired or revoked certificate is identified as such in the Status column of its respective Certificate Management list.

**CRL Revocation Checking** This process involves querying a CRL distribution-point URL and ensuring that a certificate is not on the returned revocation list maintained at the site. The URL is specified in the certificate.
No setup is needed in the administrative console to enable CRL checking. PingFederate automatically checks CRLs if all of the following conditions are met:

- The certificate contains the URL where the CA maintains its CRL.
- The URL is accessible.
- The returned CRL is signed and the signature verified.
- CRL validation is not explicitly disabled as a failover option in the OCSP setup (see “Certificate Revocation Checking” on page 98).

**OCSP Revocation Checking**  OCSP was developed as an alternative to CRL validation and provides a more centralized and potentially more reliable means of checking certificate status. In this scenario, an OCSP Responder URL is normally embedded in the incoming certificate (a configured default URL may be used, alternatively). The URL, maintained by the issuing CA, is used to query the certificate status.

The primary difference between OCSP and CRL checking is how the verification occurs. CRL checking requires the requesting client to determine if the certificate has been revoked (or if any of the certificates in the chain of issuer certificates has been revoked), based on the returned CRL. With OCSP, the client sends the certificate itself, and revocation checking is handled by the Responder server, which returns the certificate status.

A PingFederate administrator can enable and configure OCSP processing in the administrative console (see “Certificate Revocation Checking” on page 98). The protocol may be used exclusively or in conjunction with CRL checking as a backup.

For more information about OCSP, see [www.ietf.org/rfc/rfc2560.txt](http://www.ietf.org/rfc/rfc2560.txt).

**Digital Signing Policy Coordination**

To coordinate digital signature policy, partners must first agree about whether they will sign SAML messages. In some cases, the protocol specifications require signatures—for example, all assertions sent across the POST binding must be signed. (These requirements are enforced by the PingFederate administrative console and the runtime protocol engine.) Other uses of the digital signatures are optional between partners. Numerous scenarios are possible, including:

- SP verifies incoming response signatures
- SP verifies incoming assertion signatures
- SP signs outgoing requests
- IdP signs outgoing responses
- IdP signs outgoing assertions (for any binding)
- IdP signs outgoing requests for single logout
- IdP verifies incoming request signatures

The signing partner must send certificates (containing only the public keys) out-of-band to the validating partner, who must import the certificates into
PingFederate before they can be used for validation of signed messages (see “Digital Signing and Decryption Keys & Certificates” on page 94).

Example Configuration Scenario: IdP Signs Outgoing Response
1. The IdP generates a private and public keypair and submits a certificate for CA signing (optional: self-signing by the IdP).
2. The IdP imports the CA’s signing response into the PingFederate keystore.
3. The IdP configures the connection to the SP to sign SAML responses.
4. The IdP exports the public key of the certificate, which is sent to the SP out-of-band.
5. The SP administrator imports the certificate into the PingFederate digital signature verification keystore for the IdP federated connection.
6. The SP administrator configures the connection to use the certificate to verify the digital signatures on incoming IdP responses.

Secure Sockets Layer

SSL certificates signed by a CA can be used to identify one or both ends of the federation. SSL/TLS provides an encrypted connection between the two parties in which the content of a message is not exposed, thus ensuring confidentiality and message integrity.

SAML SSL/TLS Scenarios

SSL/TLS should be used in association with the SOAP responder URL and Single Sign-on Service located at an IdP site. On the SP side, the Artifact Resolution Service should also use SSL/TLS. Optionally, SSL/TLS may also be used to secure communication between internal user data stores and PingFederate.

Authentication

PingFederate can be configured to use SSL/TLS to encrypt the communication channel over which SAML transactions are transmitted and to authenticate connection partners making SOAP requests. Three methods of authentication are available for use with PingFederate. The selection of one or more method(s) must be agreed upon between partners and synchronized within IdP and SP federation implementations:

- HTTP Basic Authentication: partners identify themselves by passing username and password credentials.
- SSL Client Certificate Authentication: partners use SSL Client Certificates presented during SOAP request transactions. Each partner needs to import
the other's certificate out-of-band (see “SSL Client Keys & Certificates” on page 92).

---

**Important:** The SSL/TLS server-client handshake involves negotiating cipher suites to be used for encryption/decryption on each side of a secured Internet transaction. PingFederate supports only stronger cipher suites; to enhance security, weaker cipher suites are commented out of two configuration files located in `<pf_install>/server/default/data/config-store`:
- `com.pingidentity.crypto.SunJCEManager.xml`
- `com.pingidentity.crypto.LunaJCEManager.xml`

To ensure the most secure transactions, we recommend that administrators retain this cipher-suite configuration.

Due to import control restrictions, the standard Java Runtime Environment (JRE) distribution supports strong but not unlimited encryption. For this reason, the strongest cipher suites in the same configuration files are also commented out. To use the strongest encryption, when permissible, remove the comments from the AES 256 cipher suites and download and install the appropriate version of “Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files” from the Sun download Web site (http://java.sun.com/javase/downloads).

---

- **Digital Signatures:** partners sign the XML message transmitted via the SSL/TLS connection. Signatures are verified by the receiver based upon the certificate(s) configured for that connection. Each partner should import the other's certificate(s) out-of-band (see “Digital Signing and Decryption Keys & Certificates” on page 94).

**Verifying Trusted Certificates**

PingFederate validates the trust of all certificates. A certificate is trusted if the certificate of its issuer is in PingFederate's trusted certificate store. The root certificate of the CA, by which a certificate is issued, must be imported into PingFederate's trusted certificate store.

**XML Encryption**

PingFederate supports the optional SAML 2.0 specification allowing for encryption of assertions, which further enhances confidentiality when required.

For SAML 2.0 connections you can choose to encrypt entire assertions, the user's name identifier, and/or other user attributes. You can use signature verification and signing keys to encrypt and decrypt messages, respectively.
Federation Planning Checklist

An essential first step in establishing an identity federation involves discussions and agreements between you and your connection partners. Below is a checklist of items that should be coordinated before you deploy PingFederate:

**Signing and Validation**

Decide which SAML messages—assertions, responses, requests—will be digitally signed and how the messages will be verified by your federation partner. If messages are signed, decide how certificates will be exchanged (for example, secure email). (See “Certificates, SSL, and XML Encryption” on page 11.)

**Back-Channel Security**

Determine what type of SOAP channel authentication will be used: basic or SSL/TLS. If SSL/TLS is used, determine whether server-only or both server and client certificates will be needed and how they will be managed. Also decide what level of security will be required for connections to back-end data stores or identity management systems.

**Trusted Certificate Management**

Determine whether both partners are using SSL/TLS and/or signing certificates that have been signed by a major CA. (If self-signed certificates or nonstandard CAs are used, the signed certificates must be exchanged and imported into Trusted Certificate stores.)

**Deployment**

Decide how PingFederate fits into your existing network. Also, determine whether high-availability and/or failover options are required (see the PingFederate Server Clustering Guide).

**Federation Server Identification**

Determine how you and your partner(s) will identify your respective federation deployments. Under federation standards, both the sender (IdP) and the receiver (SP) of an assertion must be uniquely identified within the identity federation (see “Configuration Data Exchange” on page 18).

With PingFederate, you define a unique ID for each supported protocol (see “Specifying Federation Information” on page 65). Optionally, you can also use Virtual Server IDs on a connection-by-connection basis. This option provides more configuration flexibility in cases where you need more than one connection to the same partner for different purposes. For example, you would want to use virtual IDs if you are an IdP and you have an SP partner who requires a different set of attributes to launch different applications. Assigning virtual IDs allows you to configure multiple connections to such a partner, each set up to manage attributes differently. (Note that the partner must also have a federation deployment that supports multiple federation IDs.)
You can assign virtual server IDs either as an IdP during configuration of an SP connection (see “General Information” on page 119) or as an SP configuring an IdP connection (see “General Information” on page 212).

**Tip:** PingFederate also provides for virtual host names, which differ from virtual IDs (but are not mutually exclusive); they are intended to be used when your network configuration is such that you receive federation messages under more than one domain name (see “Using Virtual Host Names” on page 42).

**Server Clock Synchronization**

Ensure that both the SP and IdP server clocks are synchronized. SAML messages provide a time window that allows for small synchronization differentials. However, wide disparities will result in assertion or request time-outs.

**User Data Stores**

Identify the type of data store that contains user data when needed: LDAP, JDBC, or Custom (see “Data Stores” on page 10).

**Web Application and Session Integration**

Decide how the IdP side of PingFederate receives subject identity information to look up the session.

For an SP, decide how PingFederate will forward user identity information to the destination Web application or system to start a session. (See “Integration Kits and Adapters” on page 7).

**Transaction Logging**

PingFederate provides basic transaction logging and monitoring. Decide whether transaction logging should be integrated with a systems management application and whether you have regulatory compliance requirements that affect your logging processes. (For more information, see “Log File Generation” on page 27.)

**Identity Mapping**

Decide whether you will use PingFederate to link accounts on your respective systems using a persistent name identifier, or whether you will use account mapping (see “Identity Mapping” on page 5).

**Attribute Contract Agreement**

If your federation partnership will not use account linking, or will not use it exclusively, then you and your partner must agree on a set of attributes that the IdP will send in an assertion. (For more information, see “Attribute Contracts” on page 9.)
Chapter 1

Key Concepts

Metadata Exchange

If you are using SAML, decide whether you will use the metadata standard to exchange XML files containing configuration information. PingFederate makes it easy to use this protocol, which provides a significant shortcut to setting up your partner connections. (If you partner is also using PingFederate or supports standards permitting runtime metadata exchange, the process can be even simpler—see “Using Auto-Connect” on page 19.)

Configuration Data Exchange

If your partner's deployment does not produce or consume a metadata file that conforms to SAML metadata specifications, you may need to exchange connection information manually. The following sections list some common configuration details that must be exchanged if metadata files are not used. (These lists are not exhaustive.)

IdP to SP

If you are the IdP, your SP partner will need some or all of the following connection information (depending upon which profiles and bindings you are configuring):

- **Unique ID**—Identifies the IdP that issues an assertion or other SAML message. For SAML 2.0, the ID is the IdP's Entity ID; for SAML 1.x, it is the IdP's Issuer; for WS-Federation, it is the IdP's Realm.
  
  PingFederate also supports the optional use of virtual IDs (see “Federation Server Identification” on page 16).

- **SOAP Artifact Resolution URL**—The endpoint your site uses to receive an SP's SOAP requests when the artifact binding is used.

- **Single Logout Service URL**—The destination of SLO request messages.

- **Single Sign-On Service URL**—The endpoint where you receive and process assertions.

SP to IdP

If you are the SP, your IdP partner will need some or all of the following connection information (depending upon which profiles and bindings you are configuring):

- **Unique ID**—Identifies the SP. For SAML 2.0, the ID is the Entity ID; for SAML 1.x, it is the SP's Audience; for WS-Federation, it is the SP's Realm.
  
  PingFederate also supports the optional use of virtual IDs (see “Federation Server Identification” on page 16).

- **SOAP Artifact Resolution Service URL**—The endpoint to use for SOAP requests when the artifact binding is used.

- **Single Logout Service URL (SAML 2.0)**—The destination of SLO request messages.
• **Assertion Consumer Service URL**—The location where the SP receives assertions.

• **Target URLs**—The URLs for the protected resources that a user is trying to access.

**Mutual Settings Between Parties**

Many settings must be mutually set by the parties. This information might include such items as:

• **Attributes**—User information that will be sent in an assertion, if any (see “About Attributes” on page 8).

• **Signing certificates**—The SAML and WS-Federation protocols specify a number of conditions under which digital signatures are either required or optional (these conditions are built into the PingFederate connection-setup screens).

• **SOAP connection type and authentication style**—For SAML connections using the back channel (using the artifact binding, for example), HTTP Basic authentication, SSL client certificate authentication, digital signatures, or some combination of the three is required. You and your partner must exchange the necessary credentials, certificates, and/or signing keys.

**Using Auto-Connect**

PingFederate allows organizations to provide secure Internet SSO on the fly—that is, without the need for configuring partner-specific connection parameters. This feature—Auto-Connect™—extends SAML 2.0 SP-initiated SSO or SLO and metadata specifications to enable deployments to retrieve partner connection information securely on an as-needed basis. (For information about SAML 2.0, see the “Supported Standards” chapter in Getting Started.)

The feature is especially useful to an SP who wants to provide SSO capability to more than one partner. A Software-as-a-Service (SaaS) provider, for example, can provide SSO to innumerable clients without specifying redundant connection information for each one. Auto-Connect can also help an enterprise, acting as an IdP, provide easily scalable SSO for multiple outsourced services.

For either an IdP or SP PingFederate server, you can implement Auto-Connect for any number of partners by configuring a common initial setup and a list of domain names. For an IdP, the domain-name list contains SP partners from whom your site will accept Auto-Connect authentication requests. For an SP, the list contains IdP-partner domains to which your site can send authentication requests and receive SSO assertions.

For information about configuring Auto-Connect for your federation partners, see “Configuring SP Auto-Connect” on page 189 or “Configuring IdP Auto-Connect” on page 265.
Chapter 1

Key Concepts

Providing Metadata

You enable Auto-Connect as part of Server Settings from the Main Menu (see “Choosing Roles and Protocols” on page 63). Once Auto-Connect is enabled and your initial setup is fully configured and activated, partners can retrieve your connection metadata via HTTP. At runtime, Auto-Connect deployments at partner sites use the endpoints provided in the metadata to interact with your server and complete SSO or SLO processing.

The metadata, which follows SAML 2.0 specifications, must be signed, and the validity of the data is time-limited (see “Auto-Connect Security Model” on page 21) and “Configuring Auto-Connect Metadata Lifetime” on page 69).

Runtime Processing

Auto-Connect runtime processing starts when a user tries to reach a protected SP resource. The process depends on SP Web-application functionality that determines the user's IdP domain (for example, from a submitted email address) and passes it to the SP PingFederate server in the SSO request.

Figure 1 and the accompanying “Processing Steps” describe the complete SSO processing flow:

![Figure 1: Auto-Connect Processing Flow](image)

**Processing Steps**

1. Internet user sends a logon request with an email address to an SP application. For example:
   
   john@mycompany.com

2. The application parses the email address and sends a request to PingFederate. For example:
   
   https://sp_host.com:9031/sp/startSSO.ping/?Domain=mycompany.com

3. The SP PingFederate server looks up the domain in a list of domain names allowed to use Auto-Connect.
4. If the domain is in the list, the SP retrieves connection metadata from the IdP's public endpoint.

   By default, PingFederate looks for the metadata by prepending http://saml to the domain. For example:
   http://saml.mycompany.com

   This default location can be changed, if necessary, in the Allowed Domains lists configured in the PingFederate administrative console.

5. After validating the metadata (see “Auto-Connect Security Model” on page 21), the SP sends an authentication request to the IdP’s SSO service.

6. If the request <Issuer> is not among the IdP’s static-connection partners, the IdP PingFederate server looks for the issuer's domain name in the list of domains allowed to use Auto-Connect.

7. The IdP retrieves the SP's metadata via its public endpoint and verifies the metadata signature.

   The process is the same as that used by the SP in Step 4.

8. The IdP requests user authentication via the configured adapter instance.

9. Once the user is authenticated, the IdP returns a signed SAML assertion to the SP’s Assertion Consumer Service (ACS) endpoint.

10. (Not shown) The SP logs the user on to the requested resource via the configured SP adapter.

### Auto-Connect Security Model

Auto-Connect processing requires digital signatures to ensure the authenticity of the published metadata as well as all subsequent SSO or SLO requests and responses. The certificate used to sign the metadata is included in the metadata, and all certificates must be signed by a trusted Certificate Authority; thus, partners need not exchange certificates out of band.

In addition to validating certificates, the PingFederate runtime server compares the partner certificate with the entity ID (the “Issuer”) found in the SAML message. Then the server matches the entity ID against the configured list of allowed Auto-Connect domains.

Figure 2 illustrates the security validation process:
Chapter 1
Key Concepts

Figure 2: Auto-Connect Security Model

Note that the diagram assumes that the same certificate is used for signing both the metadata and the runtime SAML messages. This is convenient, but not required.

User Provisioning

PingFederate provides two different kinds of user provisioning, one designed for an IdP and one for an SP:

- At an IdP site, you can provision and maintain user accounts (including “deprovisioning”) at selected hosted-software providers (see the next section, “SaaS Provisioning”).
- At an SP site, you can provision accounts for your own organization automatically, using information from SAML assertions received during SSO events (see “Express Provisioning” on page 23).

SaaS Provisioning

For IdP sites, PingFederate offers automated provisioning and deprovisioning to facilitate SSO to either (or both) of two SaaS providers: Google Apps and salesforce.com.

Tip: SaaS Provisioning, including quick-connection templates for partner SSO, is available separately from Ping Identity. Contact sales@pingidentity.com for more information.

When SaaS Provisioning is enabled, the PingFederate runtime engine polls the IdP organization's user store periodically. The server uses a separate database internally to monitor the state of the user store and keep user data synchronized between the organization and the hosted SaaS application (see Figure 3).
PingFederate provides built-in support for Microsoft’s Active Directory and the Sun Directory Server (formerly Sun ONE) as user-data sources; templates are used to preconfigure many provisioning settings. Although these are the only data stores formally tested and supported, other LDAP data stores will likely work as well (see “Identifying the Source Data Store” on page 175). For convenience, PingFederate provides a sample template that can be used for other types of LDAP servers to simplify the provisioning configuration (see “Configuring an LDAP Connection” on page 76).

Tested internal data stores include Hypersonic, MySQL, and Oracle databases (a demonstration-only, embedded Hypersonic database is installed by default). Again, any relational database may be used—scripts are provided to aid setup (see “Configuring SaaS Provisioning Settings” on page 67).

### Express Provisioning

At an SP site, PingFederate can create and update local user accounts in an external LDAP directory as part of SSO processing—Express Provisioning. This feature allows SPs to maintain accounts for users that authenticate from IdP partners without having to provision accounts manually prior to a user’s first SSO.

When configured, the PingFederate SP server writes user information to the local user store using attributes from the incoming SAML assertion. For SAML 2.0 partner connections, assertion attributes can be supplemented with user attributes returned from an Attribute Query (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

PingFederate can also update existing user accounts. When this option is enabled, PingFederate can add or overwrite attributes for a local user account each time SSO for a user is processed. Note that once user attributes are provisioned, they cannot be removed using Express Provisioning.

For information about enabling Express Provisioning, see “Choosing Profiles” on page 215. For configuration information, see “User Provisioning” on page 246.
Chapter 1

Key Concepts
This chapter describes general administrative functions for PingFederate, including:

- “Starting and Stopping PingFederate” on page 26
- “Log File Generation” on page 27
- “Exporting Metadata” on page 30
- “Signing XML Files” on page 34
- “Using the Configuration Archive” on page 35
- “Account Management” on page 36
- “Managing Email Configuration” on page 40
- “Using Virtual Host Names” on page 42
- “Changing Configuration Parameters” on page 42
- “Installing a New License Key” on page 45
- “Automating Configuration Migration” on page 46
- “SaaS Provisioning CLI” on page 47
- “Customizing User-Facing Screens” on page 50

Note: The information in this chapter is presented from the viewpoint of an administrative user with “Admin” permissions (see “Account Management” on page 36).
Starting and Stopping PingFederate

(Windows)

To start PingFederate:

- From Start > Run dialog or a command prompt, run the batch file:
  
  `<pf_install>\pingfederate\bin\run.bat`

  Or:

  Open the `bin` folder in Windows and double-click the file.

  Wait a moment for the script to execute. The server is started when you see the message “Started in [xx]:[yy]ms” in the command window, near the end of the startup sequence.

To shut down PingFederate:

1. Enter Ctrl+C in the command-prompt window.
2. Enter `y` to terminate when prompted.

(Linux)

To start PingFederate:

1. From a command prompt, change directories to `<pf_install>/pingfederate/bin`.
2. Add executable permission to the startup script:
   
   `chmod 755 ./run.sh`

3. Execute the `run.sh` file.

   Wait a moment for the script to execute. The server is started when you see the message “Started in [xx]:[yy]ms” in the command window, near the end of the startup sequence.

To shut down PingFederate:

- Enter Ctrl+C in the terminal window.

(All Platforms)

To access the PingFederate administrative console:

- Launch a Web browser and go to this location:

  `https://<DNS_NAME>:<port>/pingfederate/app`

  Where `<DNS_NAME>` is the fully qualified name of the machine running the PingFederate server and `<port>` is the port where the administrative console listens. The default port is 9999.
Log File Generation

PingFederate generates log files that document the system's activities. The logs are stored in the `<pf_install>/pingfederate/log` directory and include:

- **admin.log** — Records all actions performed by administrative console users (see “Administrator Audit Logging” on page 28)
- **transaction.log** — Records individual identity-federation runtime transactions at specified levels of detail
  The level of detail is configurable globally or on a connection-by-connection basis (see “Runtime Transaction Logging” on page 29).
- **server.log** — Records all PingFederate runtime and administrative server activity
- **provisioner.log** — Records only SaaS Provisioning activity (see “SaaS Provisioning” on page 22)

**Tip:** PingFederate logs user attributes, when they are present, in the server log, the transaction log, or both. When privacy is required for sensitive user attributes, you can configure PingFederate to obfuscate (mask) their values in the server and transaction logs (see “Attribute Masking” on page 10).

Other logs contained in the `pingfederate/log` directory are generated by the PingFederate Web container. These logs, `<date>.request.log`, record all HTTP requests for the given date.

**Note:** Properties controlling request logging are contained in the Web-container configuration file `jboss-service.xml` located in the PingFederate-installation directory: `pingfederate/server/default/deploy/jetty.sar/META-INF`

In addition, a JBoss-generated startup log, `boot.log`, is located in the directory: `pingfederate/server/default/log`

The PingFederate-generated logs can be controlled through the `log4j.xml` file located in `pingfederate/server/default/conf/`. See comments in the file for more information. Refer to the log4j open-source project for more information about logging levels and other configuration parameters (http://logging.apache.org/log4j/docs).

By default, PingFederate installs with a highly verbose level of logging. However, verbose logging may have a performance impact and clutter the log files. You may
choose to lower the level, but we recommend that you not set it below \texttt{WARN}. For the \texttt{transaction.log}, note that any setting below \texttt{INFO} turns logging off.

\begin{itemize}
  \item \textbf{Important:} The \texttt{transaction.log}, the \texttt{admin.log}, and the \texttt{provisioner.log} files roll over at midnight each day. The system keeps all of the resulting historical log files. The \texttt{transaction.log} can become quite large, depending on your production load and settings (see “Runtime Transaction Logging” on page 29); you might wish to back up or remove older files on a routine basis.

  Other PingFederate log files roll over when they reach 10MB. The system keeps five old log files of each type before overwriting the oldest. (This number can be changed in the /conf/log4j.xml file.)
\end{itemize}

The following sections provide more detail about the \texttt{admin} and \texttt{transaction} logs.

\section*{Administrator Audit Logging}

PingFederate records actions performed by server administrators. This information is recorded in the \texttt{admin.log} file. While the events themselves are not configurable, \texttt{log4j.xml} configuration settings may be adjusted to deliver the desired level of detail surrounding each event.

Each entry in the \texttt{admin.log} file is on a separate line and represents a single administrator action. The general format of each entry is the same, though specific events are recorded with information relevant to each type. Events are recorded when the corresponding \texttt{Save} button in the administrative console is clicked.

A log entry is generated for each of the events listed below:

\begin{itemize}
  \item Password change
  \item Password reset
  \item Account activation
  \item Account deactivation
  \item Role change
  \item Login attempt
  \item Explicit user logouts (no time-outs)
  \item Data store created
  \item Data store modified
  \item Data store deleted
  \item Certificate management
  \item SP connection created, modified, or deleted
  \item IdP connection created, modified, or deleted
\end{itemize}
Log File Generation

- URL-to-adapter mapping management
- SP Adapter created, modified, or deleted
- IdP Adapter created, modified, or deleted
- Server settings management
- Metadata export
- Configuration archive
- IdP Discovery management
- SP Affiliation created, modified, or deleted
- Attribute requester mapping
- IdP default URL modified
- SP default URLs modified
- XML file signatures applied

Each log entry contains information relating to the event, including:
- The time the event occurred on the PingFederate server.
- The username of the administrator performing the action.
- The role(s) assigned to the administrator at the time the event occurred.
- The type of event that occurred.
- Details about the event.

Each of the above fields is separated by a vertical pipe (|) for easier parsing.

Runtime Transaction Logging

PingFederate provides for flexible, scalable logging of all federated-identity transactions (inbound and outbound XML messaging). Transaction logging can be configured to any of four modes on a connection-by-connection basis (see “General Information” in either of the “Managing Connections: . . .” chapters).

You also have the option of overriding transaction logging for all connections (to find this feature, click the relevant Manage All . . . under IdP/SP Connections on the Main Menu). You might wish to use this override for troubleshooting or as a one-step means of raising or lowering all connection logging modes to the same level.

Transaction Logging Modes

The table below describes the four transaction logging modes:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No transaction logging.</td>
</tr>
</tbody>
</table>
### Exporting Metadata

For SAML deployments PingFederate supports the export and import of metadata files, which federation partners can use to expedite their deployments. You export metadata via the Main Menu. You can import your partner's metadata file, when available, at the beginning of the connection-configuration process (see “Managing IdP Connections” on page 205 or “Managing SP Connections” on page 112).

#### Table 2: Transaction Logging Modes (Continued)

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Standard** (Default) | Logs summary information for each transaction message, including:  
  - Time stamp  
  - Hostname:Port  
  - LogMode  
  - ConnectionID  
  - SAML Status Code> (for SAML responses only)  
  - Context  
  - MessageType  
  - SAML ID (for SAML messages only)  
  - Endpoint (for outbound messages only)  
  - Target URL (if SSO transaction) |
| **Enhanced** | Includes everything logged at the Standard level plus:  
  - SAML_SUBJECT*  
  - Binding  
  - RelayState (if available)  
  - SignaturePolicy  
  - SignatureStatus  
  - HTTP Request Parameters (outbound messages only)  
  * Only when available in a SAML assertion, a single Logout Request, a Request Security Token Response (RSTR), or an authentication request (AuthnRequest) |
| **Full** | Includes everything logged at the Enhanced level plus the complete XML message for every transaction. |

Each of the above fields is separated by a vertical pipe (|) for easier parsing.
To reach the Metadata Export task:

- Click SAML Metadata Export under Administrative Functions on the Main Menu.

To export connection metadata:

1. If your PingFederate server is configured to act as both an IdP and an SP, indicate which type of configuration you will export and click Next.
2. On the Metadata Mode screen, choose the option to “Use a connection . . .” and click Next.
3. On the Connection Metadata screen, select the connection from the drop-down menu and click Next.
4. (Optional) On the Metadata Signing screen, select a certificate to use for signing the metadata XML file and click Next.

**Note:** If you want to include the public-key information in the signed XML file, select the Key Info option.

For more information, see “Signing XML Files” on page 34.

5. On the Export & Summary screen click the Export button, save the file, and then click Done.

To export selected metadata:

1. If your PingFederate server is configured to act as both an IdP and an SP, indicate which type of configuration you will export and click Next.
2. On the Metadata Mode screen, select the option to “Select information . . .” and click Next.
3. If you support more than one federation protocol, select the desired protocol on the Protocol screen and click Next.
4. Configure any or all of the remaining steps in the task (click Next to skip steps). For information see:
   - “Defining Metadata Attribute Contracts” on page 32.
   - “Choosing a Metadata Signing Key” on page 33.
5. (Optional) On the Metadata Signing screen, select a certificate to use for signing the metadata XML file and click Next.

Note: If you want to include the public-key information in the signed XML file, select the Key Info option.

For more information, see “Signing XML Files” on page 34.

6. On the Export & Summary screen click the Export button, save the file, and then click Done.

Defining Metadata Attribute Contracts

The Attribute Contract screen allows you to define the attribute contract you want to export in the metadata. For more information, see “Attribute Contracts” on page 9.

To reach this screen:
1. Click SAML Metadata Export under Administrative Functions on the Main Menu.
2. On the Metadata Mode screen, click the button for selecting the information manually and click Next.

To add an attribute:
1. Enter an attribute on the Attribute Contract screen and click Add.
2. Continue to add attributes as needed and click Next.

To edit an attribute name:
1. Click Edit and make your change.
2. Click Update.

To delete an attribute:
1. Click Delete.
Choosing a Metadata Signing Key

In your metadata file you can manually include the public key for partners to use to verify the digital signature you will use to sign SAML messages. For more information, see “Digital Signing and Decryption Keys & Certificates” on page 94.

To export your public signature verification key:

- Select the key from the drop-down list and click **Next**.

XML Encryption Certificates

In your metadata file you can manually include the XML encryption key and certificate your partners can use to encrypt SAML messages.

To export an XML encryption key:

- Select the key from the drop-down list and click **Next**.

  If the certificate is not shown, click **Manage Certificates** to import it.
Completing the Export

On the Export & Summary screen, you can complete the XML-file download or change any information by clicking any of the headings in the Summary.

**Important:** To finish the download, you must click the Export button at the bottom left of the Export Metadata screen.

Signing XML Files

PingFederate supports digital signing of SAML metadata files or any other XML files that you and your partner might want to exchange. A signature applied to an XML file ensures that the file is from the original source and that its contents have not been modified by a third party.

When you configure a partner connection, you can also verify and import signed metadata files. For information:

- As an SP configuring an IdP connection, see “Importing Metadata” on page 212.
- As an IdP configuring an SP connection, see “Importing Metadata” on page 118.

XML file signing is available from the Main Menu under Administrative Functions.

**To sign an XML file:**

1. On the Select XML File screen, locate and open the file.
2. On the Digital Signature Settings screen, choose the certificate containing your signing key from the drop-down list.

**Note:** By default, certificate and public-key information is included in the signed XML file. If you do not wish to include this information, clear the Key Info checkbox.
3. On the Export & Summary screen, click the **Export** button to save the signed file.

**Important:** Be sure to click **Export** in the lower-left portion of the Export & Summary screen; clicking **Done** does not complete the operation.

---

**Using the Configuration Archive**

PingFederate’s archive utility allows you to download your configuration to a ZIP file. You can use this file to restore server configurations. A configuration archive is created automatically every time you log on to the administrative console. The archives are stored in `pingfederate/server/default/data/archive`.

Configuration archives can also be used to transfer data to a new release of PingFederate—for example, to upgrade from version 4.0 to 5.0.

**Note:** The configuration archive does not include error-page or other end-user HTML templates (see “Customizing User-Facing Screens” on page 50). If any changes have been made to these pages, you must copy them over to new installations of PingFederate.

**Caution:** Configuration archives used for new releases must not contain any draft connections. Either complete or remove any unfinished partner connections in your current PingFederate version before creating the upgrade archive.

---

**To reach this screen:**

- Click **Configuration Archive** on the Main Menu.

**To save an archive:**

- On the Configuration Utilities screen, click **Export** and save the download to your file system, then click **Done**.
To deploy an archive:

1. Copy the file into the directory:
   
   `<pf_install>/pingfederate/server/default/data/drop-in-deployer`

2. Rename the copied file to `data.zip`.

   When the PingFederate server is running, the file is renamed with a time stamp after a moment and the data automatically deploys.

   ⚠️ Caution: A deployed archive overwrites any existing configuration data.

---

**Account Management**

PingFederate provides a choice of single- or multi-user system administration (see “Setting Administration Style” on page 56).

⚠️ Note: This choice is not presented if you are using your network’s LDAP user-data store for PingFederate authentication to the administrative console (see “Using LDAP Authentication” in the “Installation” chapter of *Getting Started*).

If you choose native multi-user administration or if you are using network LDAP authentication, PingFederate provides role-based access control, as shown in Table 3. For native multi-user administration, you can choose to use email for password setting and resetting notifications.

**Table 3: PingFederate User Access Control**

<table>
<thead>
<tr>
<th>Role Assignment</th>
<th>Access Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Admin</td>
<td>Manage users, select administration style (single- or multi-user), define email notification policies, and configure an SMTP server connection. (This role is not provided if you are using LDAP authentication for administrative logon, since user management is handled outside of PingFederate.)</td>
</tr>
<tr>
<td>Admin</td>
<td>Configure partner connections and most system settings (except user management and local key/certificate handling).</td>
</tr>
<tr>
<td>Crypto Admin</td>
<td>Manage local keys and certificates.</td>
</tr>
<tr>
<td>Auditor</td>
<td>View-only permissions for all administrative functions.</td>
</tr>
</tbody>
</table>
When Auditor is assigned, no other roles may be set. Admin users may have multiple roles set.

**Tip:** The same user may log on from more than one browser or location. Also, by default, more than one user can log on to PingFederate at a time. You can change this default to restrict the administrative console to one administrative user at a time (see “Changing Configuration Parameters” on page 42).

Any number of auditors may log on at any time, regardless of the property setting.

**To reach the Account Management screen:**

- Click Account Management under Administrative Functions on the Main Menu.

**Note:** If you are using your network’s LDAP user-data store for PingFederate authentication, the Account Management configuration is not available. Set PingFederate-specific permissions for existing network users in the LDAP runtime configuration file in `<pf_install>/pingfederate/bin` (see “Using LDAP Authentication” in the “Installation” chapter of Getting Started).

Users with User Admin permissions can add other users, assign them any role, or reset their passwords, as well as change their own passwords. Other types of users can change only their own passwords from this screen (see “Changing Passwords” on page 40).

**To add a user:**

1. Click Create User.
2. On the User Information screen, enter the required fields (indicated by asterisks).

   **Note:** Only Username is required, unless you elected on the Account Management screen to have PingFederate send passwords via email, in which case you must supply an email address.

3. (Optional) Enter additional information.

4. Click **Next** to set up a password (see “Setting or Resetting Passwords” on page 39).

   **Important:** After you set the password and return to the Account Management screen, you must select permissions for the new user and click **Save** to complete the process.

**To define a user’s permissions:**

- Select or clear the checkboxes under the permission categories you want to assign or remove (see Table 3 on page 36).

  Clicking the Auditor button deactivates other permission selections.

**To deactivate a user:**

- Click **Deactivate** for the user.

   **Note:** For traceability and accountability purposes, users cannot be deleted; their records are retained and they can be reactivated if needed.

**To enable password notification:**

1. Click the password-notification checkbox.

2. If you have not yet configured PingFederate to use your email server, click **Email Server Settings** and complete the configuration (see “Managing Email Configuration” on page 40).

3. Click **Save** (or **Next** if you are installing PingFederate).

   **Note:** If you are setting up email notifications for the first time, you must click **Email Server Settings** and configure the settings. If you are not sure of the correct settings, enter placeholders on the Email Notification screen; you can return later and update the information.
## Setting or Resetting Passwords

A user administrator can generate or assign temporary passwords for other users, either during user setup or at a later time (for example, if a user forgets his or her password).

**Note:** If you are using an LDAP user-data store for PingFederate authentication, password management is handled at the network level.

Initial or reset passwords may be used only once; the administrative console requires the user to change the password immediately after logging on.

To reach this screen:

1. Click **Account Management** on the Main Menu.
2. Click **Reset Password** under **Action** for a user.

To set or reset a user’s password:

1. Either:
   - Click **Generate one-time password**.
   - Enter a password in the text box (no restrictions apply for a temporary password).

2. Click **Done**.

**Important:** The password and any other changes, including new user records, are not stored until you click **Save** on the Account Management screen.

After you click **Save** on the Account Management screen, the new password is emailed to the user automatically, if you have enabled email notifications (see “Account Management” on page 36).
Chapter 2
System Administration

Changing Passwords

Any user can change his or her own password. For information about resetting another user’s password (if you are a user administrator), see the previous section.

Note: If you logged on to PingFederate using your network ID and password, you can change your password only at the network level. The new password will apply to PingFederate automatically the next time you log on.

To change your password:
1. Click Account Management on the Main Menu.
2. On the Account Management screen, click Change Password under the Action column.
3. Enter your Current Password and New Password (twice) and click Save.
   Passwords must be at least six characters long and contain at least one uppercase character, one lower-case character, and one number.

Important: If you are the sole user administrator, take steps to ensure that you do not forget your new password.

Managing Email Configuration

If you are using email notification for password resets, licensing events, or certificate-expiration warnings, you must set up and maintain a connection to the email server that PingFederate will use to send messages (see “Account Management” on page 36 and “Configuring Runtime Notifications” on page 57).
To reach this screen:

- Click Email Configuration on the Main Menu under Administrative Functions.

If this link is not displayed, then no email notifications are configured (see "Configuring Runtime Notifications" on page 57 or "Account Management" on page 36).
To configure access to your email server:

1. Enter information into all fields. (Username and Password are not required.)

2. (Optional) Enter an email address (or addresses) in the Test Address field and click Test Email Connectivity.

   A message next to the button indicates a successful test. Verify that the test email address received a message from the server.

   Test reports are also written to the server.log file in the /log directory.

Using Virtual Host Names

In certain contexts, the SAML specifications require that XML messages include a URL identifying the host name to which the sender directed the message. (The name of the XML element containing the URL varies among protocols.) In addition, the recipient must verify that the value matches the location where the message is received.

Depending on your networking requirements, this specification can present problems—for example, in the case of proxy forwarding, where the final destination host name might be unknown to your federation partner. To provide more flexibility in such cases, you can set up a list of alternative host names for PingFederate to use as part of its message-security validation.

Note that virtual host names are used for a different purpose than virtual server IDs, which provide separate unique identifiers for a federation deployment, normally in the same domain (see “Federation Server Identification” on page 16). Depending on your needs, however, you can configure virtual server IDs and virtual hosts in the same installation of PingFederate.

Changing Configuration Parameters

PingFederate’s default administrative-console and runtime behavior is controlled in part by configuration properties contained in the file run.properties, located in: <pf_install>/pingfederate/bin. Table 4 describes the properties; refer to the file itself for default settings not specified here.
You can change these settings as needed. Restart the PingFederate server for changes to take effect.

**Note:** Properties related to server clustering are described in the PingFederate Server Clustering Guide.

**Important:** If your site uses clustering, changes to default settings for runtime-server properties must be applied to other server nodes manually. The settings in `run.properties` are not replicated using automated synchronization methods.

### Table 4: PingFederate Configuration Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>pf.admin.https.port</td>
<td>Defines the port on which the PingFederate administrative console runs. Default is 9999.</td>
</tr>
<tr>
<td>pf.console.bind.address</td>
<td>Defines the IP address over which the PingFederate administrative console communicates. Use for deployments where multiple network interfaces are installed on the machine running PingFederate.</td>
</tr>
<tr>
<td>pf.console.login.mode</td>
<td>Indicates whether more than one Admin user may access the administrative console at one time (see “Setting Administration Style” on page 56). Values: Single</td>
</tr>
<tr>
<td>pf.console.authentication</td>
<td>Indicates whether administrators log on to PingFederate using credentials managed internally, by PingFederate, or externally, using your network LDAP data store. Values: native</td>
</tr>
<tr>
<td>ldap.properties.file</td>
<td>When LDAP administrative-console authentication is enabled, indicates the name of the file containing configuration properties.</td>
</tr>
</tbody>
</table>
### Table 4: PingFederate Configuration Properties (Continued)

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>pf.http.port</td>
<td>Defines the port on which PingFederate listens for unencrypted HTTP traffic at runtime. For security reasons, this port is turned off by default.</td>
</tr>
<tr>
<td>Caution: This port should remain disabled in production if your deployment configuration directly exposes the PingFederate runtime server to the Internet.</td>
<td></td>
</tr>
<tr>
<td>pf.https.port</td>
<td>Defines the port on which PingFederate listens for encrypted HTTPS (SSL/TLS) traffic. Default is 9031.</td>
</tr>
<tr>
<td>pf.secondary.https.port</td>
<td>Defines a secondary HTTPS port, for use on the back channel, to facilitate interoperability with other federation software vendors. To use this port, change the placeholder value to the port number you want to use, if needed. Additional configuration of the listener ports (including adding new listeners) is available via the <code>&lt;pf_install&gt;/pingfederate/server/default/deploy/jetty.sar/META-INF/jboss-service.xml</code> file. Of particular value are the <code>WantClientAuth</code> and <code>NeedClientAuth</code> flags, which indicate to a client the request or requirement, respectively, for a client certificate. These are set to false by default.</td>
</tr>
<tr>
<td>pf.engine.bind.address</td>
<td>Defines the IP address over which the PingFederate server communicates with partner federation gateways. Use for deployments where multiple network interfaces are installed on the machine running PingFederate.</td>
</tr>
<tr>
<td>pf.monitor.bind.address</td>
<td>Defines the IP address over which an SNMP agent and JMX communicate with PingFederate (see “Configuring Runtime Reporting” on page 59). Use for deployments where multiple network interfaces are installed on the machine running PingFederate.</td>
</tr>
</tbody>
</table>
If your license expires, you must install a new license key.

**Note:** You can configure the server to send an email in advance (see “Configuring Runtime Notifications” on page 57).

You will also need to install a new license key after you obtain PingFederate software releases (other than patch releases).

**When your license key has expired:**

1. Request a license key from Ping Identity.
   
   You will need your PingFederate version number.

2. You will receive the license key via email.

3. Save the `pingfederate.lic` file to `pingfederate/server/default/conf`.

**Important:** The license key must be named `pingfederate.lic`. It may take up to a minute for a running server to recognize the new key.

### Table 4: PingFederate Configuration Properties (Continued)

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>pf.ajp.port</td>
<td>Defines the listening port for the Apache JServ Protocol (AJP) v13 protocol, for use with a proxy server. To use this setting, you must uncomment the AJP section in <code>server/default/deploy/jetty.sar/META-INF/jboss-service.xml</code>.</td>
</tr>
<tr>
<td>pf.ajp.confidential.port</td>
<td>Defines the confidential/encrypted AJP listening port.</td>
</tr>
<tr>
<td>pf.hsm.mode</td>
<td>Enables or disables (the default) a FIPS-compliance Hardware Security Module (see Appendix A in <em>Getting Started</em>).</td>
</tr>
<tr>
<td>pf.provisioner.mode</td>
<td>Enables or disables (the default) SaaS Provisioning (see “SaaS Provisioning” on page 22). Also used to enable provisioning failover (see the PingFederate <em>Server Clustering Guide</em>).</td>
</tr>
</tbody>
</table>
Automating Configuration Migration

PingFederate provides a connection-migration tool that can be used for scripting the transfer of partner connections from one PingFederate server to another—for example, from a test environment to production. The command-line utility, configcopy in \(<pf_install>/pingfederate/bin\), uses the PingFederate Connection Management Web Service to export and import connections (see “Connection Management Service” on page 299).

The tool performs these functions:

1. Retrieves connection-configuration data (XML) from a source PingFederate server.
2. Modifies the connection with configuration changes required for the target environment, according to settings in a properties file and/or command-line arguments.
3. Imports the updated connection into the PingFederate target server.

The utility works in conjunction with a companion properties file, which identifies the source and target PingFederate servers, as well as connection identifiers and any configuration settings that may need to be modified for the target environment. A template for the properties file, configcopy.conf, is also located in \(<pf_install>/pingfederate/bin\).

Copies of the properties file can be configured on a connection-by-connection basis, as needed: specify the applicable filename as an argument when running configcopy.bat or configcopy.sh (depending on your operating system) for particular connections, using the following command syntax:

```
configcopy -Dconfigcopy.conf.file=<properties_file>
```

You can also define property values (except passwords) via command-line arguments, using the following syntax:

```
configcopy -D<property>=<value>
```

where `<property>` is any property named in the properties file and `<value>` is the data you want to use for the associated connection setting at the target.

Command-line property designations take precedence over any values set in the properties file.

---

**Note:** Access to the Connection Management Web Service is username/password-protected (see “Application Authentication” on page 97). Usernames and passwords may be set in the properties file for both the source and target Web Services (passwords may be obfuscated). If passwords are set in the properties file, they cannot be overridden using the command line. If a password is not set, the configcopy tool prompts for it. (Usernames always must be supplied, either in the command line or in the properties file.)

For detailed information, including a list of all connection Override Properties (connection settings that can be modified), refer to the configcopy.conf
file. Below is a list of selected properties that might commonly need to be changed across environments:

- **SigningKeyPairReference.MD5Fingerprint**
- **DsigVerificationCert.File**
  
  These two properties will need to be changed to reflect the signing key and certificate used in the target environment, if different than those used in the source environment. This might often be the case in a testing vs. production scenario. (See “Digital Signing and Decryption Keys & Certificates” on page 94.)

- **AttributeSource.DataSourceId**
  
  This is the System ID of the data store used to retrieve user attributes, when applicable (see “Managing Data Stores” on page 70).

- **AdapterInstanceId**
  
  The Adapter Instance ID in the target environment might be different.

- **BaseUrl** (and “Endpoint URLs”)
  
  The Base URL and/or the endpoints associated with it would need to be updated if, for example, the source configuration uses nonproduction endpoints available only for testing purposes at a partner's site.

---

**Note:** This property cannot be modified during connection migration if more than one data store is configured.

- **AdapterInstanceId**
  
  The Adapter Instance ID in the target environment might be different.

- **BaseUrl** (and “Endpoint URLs”)
  
  The Base URL and/or the endpoints associated with it would need to be updated if, for example, the source configuration uses nonproduction endpoints available only for testing purposes at a partner's site.

---

**SaaS Provisioning CLI**

PingFederate provides as command-line interface (CLI) to help manage automated provisioning for SaaS users at IdP sites (see “SaaS Provisioning” on page 22). Administrators can use this tool to view the status of user provisioning, either globally or one provisioning channel at a time, and to rectify unusual situations where provisioning at the SaaS provider may get out of sync with the enterprise user store (see “Configuring SaaS Provisioning Settings” on page 67).

The CLI tool, provmgr.bat or provmgr.sh, is located in the directory <pf_install>/pingfederate/bin. The tool interacts with the internal data store PingFederate uses to maintain provisioning synchronization between the LDAP user store and the target service (see “Configuring SaaS Provisioning Settings” on page 67).

Note that the tool creates its own log file, provmgr.log, located in the directory <pf_install>/pingfederate/log. You can control settings for this log, as needed, in the file provmgr.log4j.properties, located in the bin directory.
The following tables describes the available global and channel-specific command arguments:

**Table 5: SaaS Provisioning CLI Global Options**

<table>
<thead>
<tr>
<th>Command Argument</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>--help</td>
<td>Describes the available options. The help is also displayed if the command is run with no arguments.</td>
</tr>
<tr>
<td>--show-channels</td>
<td>Lists all channels in a table format, showing for each:</td>
</tr>
<tr>
<td></td>
<td>- ID - A numeric channel ID (channel-specific commands need this ID)</td>
</tr>
<tr>
<td></td>
<td>- Name - The channel name</td>
</tr>
<tr>
<td></td>
<td>- Connection ID</td>
</tr>
<tr>
<td></td>
<td>- Status (active/inactive) - Both the connection and the channel status are shown (see “Channel Activation and Summary” on page 183)</td>
</tr>
<tr>
<td></td>
<td>- User count/dirty-user-record count (e.g.: 5000/12 means 5000 users and 12 dirty records)</td>
</tr>
<tr>
<td></td>
<td>- Source (as LDAP URL)</td>
</tr>
<tr>
<td></td>
<td>- Target code</td>
</tr>
<tr>
<td>--show-nodes</td>
<td>Shows all the provisioning-server nodes with their status and the last timestamp (applies only to a failover configuration—see the PingFederate Server Cluster Guide in the installation docs directory).</td>
</tr>
<tr>
<td>--force-node-backup</td>
<td>Sets the failover flag to “backup” for the associated PingFederate server node (see the Server Clustering Guide).</td>
</tr>
<tr>
<td>Use with node number: -n &lt;node ID&gt;</td>
<td></td>
</tr>
</tbody>
</table>

The table below describes the available channel-specific command arguments:

**Note:** With each command, specify the channel with the argument:  
-c <channel-id-number>

*Example:*  
provmgr -c 1 --show-source

You can determine channel ID numbers by using the global command:  
provmgr --show-channels
Table 6: SaaS Provisioning CLI Channel-Specific Options

<table>
<thead>
<tr>
<th>Command Argument</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>--reset-group-timestamp</td>
<td>Deletes the group timestamp, which forces the provisioner to process the provisioning group on the next cycle, even if the timestamp on that group did not actually change. Depending on your LDAP server and administrative practices, you may want to schedule this command to run periodically to catch up with any users that may have been deleted (rather than deactivated) in the directory server: some directory servers do not update the group timestamp for deleted users. <strong>Important</strong>: This option should seldom be needed if users are deactivated rather than deleted. If it is needed, you may wish to schedule it when other network activity is low.</td>
</tr>
<tr>
<td>--reset-attribute-sync</td>
<td>Sets the attribute sync timestamp to 1, which forces the provisioner to look at all users for changes, not only those that have a newer timestamp on their LDAP entry. <strong>Important</strong>: This option should be needed rarely and may consume considerable network resources, depending on the number of users. If it is needed, you may wish to schedule it when other network activity is low.</td>
</tr>
<tr>
<td>--reset-values-hash</td>
<td>Removes the values hash for all users. (The database stores a hash of attribute values for users to determine whether any values have been changed.) This argument forces users that have a newer timestamp on their LDAP entry to be updated at the SaaS provider, regardless of the actual field values. Note, however, that users whose recorded timestamp is unchanged are not updated.</td>
</tr>
<tr>
<td>--reset-all</td>
<td>Equivalent to using all three of the arguments above. <strong>Important</strong>: This option should be needed rarely if ever and may consume considerable network resources, depending on the number of users. If it is needed, you may wish to schedule it when other network activity is low.</td>
</tr>
</tbody>
</table>
| --show-dirty-records | Lists all users who have not been provisioned or updated at the SaaS site. Each entry shows:  
  - LDAP GUID  
  - SaaS Username  
  - SaaS GUID |
Chapter 2
System Administration

Table 6: SaaS Provisioning CLI Channel-Specific Options

<table>
<thead>
<tr>
<th>Command Argument</th>
<th>Description</th>
</tr>
</thead>
</table>
| --show-user      | Shows all internal database fields related to the specified user, including transitory mapping fields (fields waiting to be pushed to the SaaS provider); also shows all LDAP attributes retrieved from the directory server for this user.  
U se with:  
-u <SaaS Username>  
Or:  
-g <LDAP GUID> |
| --clear-dirty-records | Clears the dirty flag on all user records. |
| --delete-dirty-records | Removes all dirty user records from the internal store. |
| --delete-all-users | Removes all users from the internal store and deletes the provisioning group timestamp and the last attribute-sync timestamp.  
The effect of this command is to reset the channel to its initial state. All user metadata is lost and provisioning for the channel will start from the beginning, picking up all users and pushing them to the SaaS provider when the synchronization frequency interval is expired (see “Configuring SaaS Provisioning Settings” on page 67).  
**Important:** This option should be needed rarely if ever. If it is needed, you may wish to schedule it when other network activity is low. |
| --show-target | Displays the target configuration. |
| --show-source | Displays all source LDAP configuration parameters, including settings and location. |

Customizing User-Facing Screens

PingFederate supplies HTML templates to provide information to the end user or to request user input during SSO/SLO processing. These template pages utilize the Velocity template engine, an open-source Apache project, and are located in
Customizing User-Facing Screens

You can modify most of these pages in a text editor to suit the particular branding and informational needs of your PingFederate installation. Each page contains both Velocity constructs and standard HTML. The Velocity engine interprets the commands embedded in the template page before the HTML is rendered in the user’s browser. At runtime, the PingFederate server supplies values for the Velocity variables used in the template.

**Tip:** Variables indicated in each file are the only variables that can be used for rendering the associated Web-browser page.

For information about Velocity, please refer to the Velocity project documentation on the Apache Web site: http://velocity.apache.org/engine/releases/velocity-1.4

Changing Velocity or Javascript code is not recommended.

At runtime, the user’s browser is directed to the appropriate page, depending on the operation being performed and where the related condition occurs (see tables below). For example, if an SSO error occurs during IdP-initiated SSO, the user’s browser is directed to the IdP’s SSO error-handling page.

Applications can override the PingFederate server-hosted pages provided specifically for SSO and SLO errors by specifying a URL value in the relevant endpoint’s InErrorResource parameter (see “Application Endpoints” on page 289). Administrators can override SSO/SLO success pages by specifying default URLs in the administrative console (for the IdP configuration, see “Configuring a Default URL and Error Message” on page 109; for the SP, see “Configuring Default URLs” on page 201).

The following tables describe each of the templates. To help identify the templates from the end user’s point of view, the tables are organized by the titles that appear at the top of the user’s browser window.

**Note:** Because the templates can be customized, the default titles listed in the tables may not be accurate for your PingFederate installation or your partner’s.

<table>
<thead>
<tr>
<th>Table 7: IdP User-Facing Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Title</strong></td>
</tr>
<tr>
<td><em>Error - Single Logout</em>&lt;br&gt;idp.slo.error.page.template.html</td>
</tr>
</tbody>
</table>
### Table 7: IdP User-Facing Pages (Continued)

<table>
<thead>
<tr>
<th>Page Title and template file name</th>
<th>Purpose</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Error - Single Sign-On</strong>&lt;br&gt;idp.sso.error.page.template.html</td>
<td>Displayed when IdP-initiated SSO fails and no other SSO error landing page is specified. Displays system errors and information for the user.</td>
<td>Error</td>
<td>Consult log and Web developer</td>
</tr>
<tr>
<td><strong>Please Select Authentication System</strong>&lt;br&gt;sourceid-choose-idp-adapter-form-template.html</td>
<td>Displayed when the user must choose from several IdP security domains. Based on the user's selection, the server redirects the browser to the appropriate adapter instance for authentication.</td>
<td>Normal</td>
<td>User must make selection</td>
</tr>
<tr>
<td><strong>Signed Out</strong>&lt;br&gt;sourceid-wsfed-idp-signout-cleanup-template.html</td>
<td>Indicates user signed out of the IdP under the WS-Federation protocol and lists each successful SP logout, when applicable.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Signing Out</strong>&lt;br&gt;sourceid-wsfed-idp-signout-cleanup-invisible-template.html</td>
<td>WS-Federation IdP sign-out processing page. <strong>Note:</strong> No HTML is rendered in the browser.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Success - Single Logout</strong>&lt;br&gt;idp.slo.success.page.template.html</td>
<td>Displayed when an SLO request succeeds but no other SLO landing page is specified.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Working . . .</strong>&lt;br&gt;sourceid-wsfed-http-post-template.html</td>
<td>Used to auto-submit a WS-Federation assertion to the SP. If Javascript is disabled, the user is prompted to click a button to POST the assertion directly. <strong>Note:</strong> Normally not displayed if Javascript executes properly.</td>
<td>Normal</td>
<td>None</td>
</tr>
</tbody>
</table>

### Table 8: SP User-Facing Pages

<table>
<thead>
<tr>
<th>Page Title and template file name</th>
<th>Purpose</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Link Removed</strong>&lt;br&gt;TerminateAccountLinks.page.template.html</td>
<td>Communicates a user’s successful “defederation” operation.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Account Linking</strong>&lt;br&gt;LocalIdPasswordLookup.form.template.html</td>
<td>Used to authenticate a user at the SP when an account link needs to be established.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Authentication Failed</strong>&lt;br&gt;sourceid-wsfed-idp-exception-template.html</td>
<td>Displayed when an authentication challenge fails during WS-Federation processing.</td>
<td>Error</td>
<td>Consult log and Web developer</td>
</tr>
<tr>
<td><strong>Error - Single Logout</strong>&lt;br&gt;sp.slo.error.page.template.html</td>
<td>Displayed when an SLO request fails and no other SLO error landing page is specified.</td>
<td>Error</td>
<td>User should close the browser</td>
</tr>
</tbody>
</table>
### Table 8: SP User-Facing Pages (Continued)

<table>
<thead>
<tr>
<th>Page Title and template file name</th>
<th>Purpose</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Error - Single Sign-On</strong> &lt;br&gt; sp.sso.error.page.template.html</td>
<td>Displayed when SP-initiated SSO fails and no other SSO error landing page is specified.</td>
<td>Error</td>
<td>Consult log and Web developer</td>
</tr>
<tr>
<td><strong>Select Identity Provider</strong> &lt;br&gt; sourceid-saml2-idp-selection-template.html</td>
<td>The user requested SP-initiated SSO, but the IDP partner was not specified in the appropriate query parameter or cookie. This page allows the user to select the IDP manually. Based on the user’s selection, the server redirects the browser to the appropriate IDP partner’s SSO service.</td>
<td>Normal</td>
<td>User must make selection</td>
</tr>
<tr>
<td><strong>Signed Out - Service Provider</strong> &lt;br&gt; sourceid-wsfed-sp-signout-cleanup-template.html</td>
<td>Displays the user’s sign-out status.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Success - Single Logout</strong> &lt;br&gt; sp.slo.success.page.template.html</td>
<td>Displayed when an SLO request succeeds and no other SLO success landing page is specified.</td>
<td>Normal</td>
<td>None</td>
</tr>
<tr>
<td><strong>Single Sign-On Target Unspecified</strong> &lt;br&gt; sp.sso.success.page.template.html</td>
<td>Displayed when an SSO request succeeds but no target-resource parameter is specified by the incoming URL, and no default URL is set (see “Configuring Default URLs” on page 201).</td>
<td>Error</td>
<td>Consult Web developer, or specify default URL</td>
</tr>
</tbody>
</table>

### Table 9: Either IDP or SP User-Facing Pages

<table>
<thead>
<tr>
<th>Page Title and template file name</th>
<th>Purpose</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
</table>
| **Error - Single Sign-On** <br> generic.error.msg.page.template.html | For an Auto-Connect SSO transaction, indicates a range of possible error conditions (see “Using Auto-Connect” on page 19):  
  - The requesting Auto-Connect partner is not found in the PingFederate server’s list of allowed domains.  
  - The partner’s metadata is not accessible.  
  - The server is not configured for Auto-Connect.  
  - General error, with error code. | Error | Consult log, check configuration, or contact partner. If unresolved, contact Ping Identity support. |
| **Error** <br> general.error.page.template.html | Indicates that an unknown error has occurred and provides a error reference number and (optionally) an error message. | Error | Consult log, contact Ping Identity support |
### Table 9: Either IdP or SP User-Facing Pages (Continued)

<table>
<thead>
<tr>
<th>Page Title and template file name</th>
<th>Purpose</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sign On</strong>&lt;br&gt;AbstractPasswordIdpAuthnAdapter.form.template.html</td>
<td>Challenges user for credentials when authentication can take place via HTTP Basic Authentication or an HTML form, depending on the operational mode.</td>
<td>Normal</td>
<td>User must sign on</td>
</tr>
<tr>
<td><strong>Submit Form</strong>&lt;br&gt;form.autopost.template.html</td>
<td>Whenever the server posts a form, this template is used to auto-submit the form. If Javascript is disabled, the user is prompted to click a button to post the form manually. <strong>Note:</strong> Normally not displayed if Javascript executes properly.</td>
<td>Normal</td>
<td>None</td>
</tr>
</tbody>
</table>
System Settings

The System Settings links on the Main Menu (under My Server) provide access to global settings that may apply to either an IdP or an SP federation configuration.

This chapter covers:
- “Managing Server Settings” on page 55
- “Managing Data Stores” on page 70
- “Configuring IdP Discovery” on page 81

Note: The information in this chapter is presented from the viewpoint of an administrative user with “Admin” permissions (see “Account Management” on page 36).

Managing Server Settings

Server settings include unique federation server identifiers, the designation of your site's federation role (SP, IdP, or both), and your enabled federation protocols (see the “Supported Standards” chapter in Getting Started).

Server settings also include system-administration configuration (one-user or multi-user), email notification options and setup, and a shortcut link to account management (when multi-user administration is enabled).

If you have enabled Auto-Connect and/or a SaaS Connector, then you will need to configure several parameters specific to those features in the System Settings task flow.

You configure many of these settings initially during the installation setup (see “Running PingFederate for the First Time” in the “Installation” chapter of...
Chapter 3

System Settings

Getting Started), but you can change or add to them as needed from the Main Menu.

Information in this section covers:

- “Setting Administration Style” on page 56
- “Entering System Information” on page 57
- “Configuring Runtime Notifications” on page 57
- “Configuring Runtime Reporting” on page 59
- “Managing Accounts” on page 62
- “Choosing Roles and Protocols” on page 63
- “Specifying Federation Information” on page 65
- “Configuring SaaS Provisioning Settings” on page 67
- “Configuring Auto-Connect Metadata Signing” on page 68
- “Configuring Auto-Connect Metadata Lifetime” on page 69
- “Saving and Editing Server Settings” on page 70

Setting Administration Style

PingFederate provides a choice of single- or multi-user system administration.

**Note:** If you are using your network’s LDAP user-data store for administrative-console authentication, this choice is not applicable (see “Using LDAP Authentication” in the “Installation” chapter of Getting Started)—the System Administration screen, described in this section, is not displayed.

If you choose single-user administration, the administrative console is accessible only by using the default Administrator ID, for which full privileges are provided by default.

If you choose multi-user administration, the system provides role-based access control (see “Account Management” on page 36).
To reach this screen:
1. Click Server Settings on the Main Menu.
2. Click System Administration in the steps list.

To set single- or multi-user administration:
- Make your selection and click Next, or Save (if changing the setting).

Note: To select single-user administration, you must have only one user marked as active (see “Account Management” on page 36).

Entering System Information

On the System Info screen, you provide general information about your company.

Configuring Runtime Notifications

Depending on your licensing agreement, your PingFederate license may have an expiration date. Under Runtime Notifications you can set up the server to send an email warning when your license is about to expire.

Note: The license-notification option does not appear if you have a perpetual license.
You can also configure the server to send an email notification to a specific administrator (or a group) when a certificate used by PingFederate is about to expire, or has expired.

**Note:** When a certificate expires, PingFederate always writes an error in the server log, regardless of whether runtime notification is configured (see “Log File Generation” on page 27).

![Configuring My Server](image)

**To reach this screen:**
1. Click **Server Settings** on the Main Menu.
2. Click **Runtime Notifications** in the steps list.

**To configure notifications:**
1. Click the checkbox next to the type of notification you want, and enter an email address.
2. If you are configuring certificate-expiration notification, enter an advance-warning time period in the Initial Warning field (optional) and in the Final Warning field.

**Note:** When advance certificate-expiration notification is configured, the server also sends notification if a license expires.

3. If you have not previously configured PingFederate to access your email server, click **Email Server Settings** (see “Managing Email Configuration” on page 40).
Configuring Runtime Reporting

PingFederate supports runtime monitoring and reporting through the Simple Network Management Protocol (SNMP), a standard used by network-management consoles to monitor network and server activity across an enterprise.

In addition, PingFederate supports runtime monitoring and reporting through Java Management Extensions (JMX) (see “Runtime Monitoring Using JMX” on page 60).

Using SNMP Monitoring

The SNMP Management Information Base (MIB) is included in the docs/SNMP directory of the PingFederate distribution. The MIB describes the object identifiers that PingFederate uses to communicate information through SNMP. These identifiers are globally unique and managed by IANA (Internet Assigned Numbers Authority).

Configure details of SNMP monitoring, if your site uses this form of monitoring, on the Runtime Reporting screen.

SNMP supports Gets and Traps. A Get is a request for status information sent by a network-management console to an SNMP agent. Embedded within each PingFederate server is an SNMP agent that brokers the communication between the management console and PingFederate.

PingFederate responds to two types of Get requests:

- The total number of transactions the server has processed since installation
Chapter 3
System Settings

- The total number of failed transactions that the server has encountered since installation

**Note:** Some operating systems (Solaris 10, for example) may not allow the SNMP agent to bind to privileged ports: those below 1024. Consult your operating system's documentation on how to get around this limitation, or change the default port 161 to a port above 1023.

A Trap is a spontaneous communication from an agent to a network-management console. PingFederate generates a Trap at regular intervals—the server “heartbeat.” Each Trap contains the amount of time the server instance has been running since its most recent startup.

- If you configure Traps, change settings as needed and then click **Test SNMP Configuration** to send a single Trap to your network-management console.

You can also use an HTTP call at any time to verify that the PingFederate server is running (see “Maintenance Endpoint” on page 297).

**Runtime Monitoring Using JMX**

Similar to SNMP, JMX technology represents a Java-centric approach to application management and monitoring. JMX exposes instrumented code in the form of Managed Beans (MBeans). Application management systems that support JMX technology—for example, the standard Sun JDK client, JConsole—may request runtime information from PingFederate’s JMX server.

PingFederate’s JMX server reports monitoring data for SSO and SLO transactions as well as for SaaS Provisioning (see “SaaS Provisioning” on page 22). In addition, because PingFederate is built within an existing JBoss framework, numerous JBoss-standard MBeans are available to the PingFederate server’s JMX clients.

**Important:** Authentication is required for JMX-client access to PingFederate runtime data (see “Application Authentication” on page 97).

**SSO/SLO Monitoring**

For SSO/SLO transaction processing, PingFederate provides these MBeans:

- pingfederate:type=TOTAL_FAILED_TRANSACTIONS
- pingfederate:type=TOTAL_TRANSACTIONS

Each type contains a single attribute, Count, which reports the same information as an SNMP Get (see “Configuring Runtime Reporting” on page 59).

**Note:** Counts are reset when the PingFederate server is restarted.
Provisioning Monitoring

For SaaS Provisioning, PingFederate provides an MBean called `pf.provisioning:type=saas.provisioning.events`. The MBean exposes four JMX Operations, each corresponding to the Java methods described in Table 10. Each method returns a `CompositeData` object, which allows for the retrieval of complex data without requiring application-specific code to reside with the JMX client.

### Table 10 SaaS Provisioning JMX Monitoring Options

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
<th>Parameters</th>
</tr>
</thead>
</table>
| `viewEvents`                  | Gets an array of specific events based on the given criteria. The parameters filter the data collectively; that is, they are joined logically by "and": | `wasSuccessful` – If true, returns information only on successful transactions; false returns information only on failed transactions; null returns all transactions.  
`eventTypeStr` – The type of event. Valid values are: CREATE, UPDATE, DISABLE, ENABLE; null or an empty string returns all types.  
`fromDate` – See Note below.  
`toDate` – See Note below. |
| `eventSummaryReport`          | Gets a summary of transactions counts for the given time period. Counts are provided for success, failure, and total. Each count includes a drill-down capability, providing counts by event type. | See Note below. |
| `eventSummaryReportAllData()` | Gets a summary of transaction counts with no time constraints (equivalent to `eventSummaryReport` with null or empty strings used as parameters). | N/A. |
| `eventSummaryRollup()`        | Gets a report representing an aggregate of multiple Summary Reports covering the last 0, 1, 2, 7, 30, 60, 90, 180, and 360 days. | N/A. |

**Note:** Date parameters may be formatted as either `yyyy`, `yyyy-MM-dd`, or `yyyy-MM-dd HH:mm:ss`. A null value or empty string for a date parameter indicates no constraint for that end of the range.

Advanced JMX Configuration

By default, PingFederate uses port 1099 for its JMX server. To change the port or other JMS configuration items, if needed, modify the configuration file `jmx-...
remote-config.xml in the directory `<pf_install>/server/default/data/config-store`.

**Note:** When connecting to the JMX service using SSL (the default), ensure that the client trusts the PingFederate SSL server certificate presented (see “SSL Server Certificates” on page 89). (This should be a consideration only during testing, when using the certificate installed with PingFederate or another self-signed certificate.)

### Managing Accounts

When you choose multi-user system administration, you can create users during installation or while configuring Server Settings (see “Setting Administration Style” on page 56).

**Note:** If you are using your network’s LDAP user-data store for PingFederate authentication, the Account Management screen is not presented (see “Using LDAP Authentication” in the “Installation” chapter of Getting Started).

Alternatively, you can set up and maintain user accounts later as a separate task (assuming you have user administration permissions—see “Account Management” on page 36). By default for installation, the user “Administrator” has full system permissions.

- To continue, click **Next** or **Save**.
- For information about adding or managing users, see “Account Management” on page 36.
Choosing Roles and Protocols

On the Roles and Protocols screen, select which identity-federation role(s) your organization plays and which set of standards you will use with your federation partner (see the “Supported Standards” chapter in Getting Started).

Also on this screen, you can choose any of several options:

- As an IdP, if you have installed a PingFederate SaaS Connector, you can enable the SaaS Provisioning option (see “SaaS Provisioning” on page 22).

- As an SP, if you are using SAML 2.0 XASP for multiple IdP connections, you may choose to have PingFederate determine dynamically which connection to use (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

- For either role, you can enable Auto-Connect for SAML 2.0 connections (see “Using Auto-Connect” on page 19).

▶ If you are installing PingFederate and are not sure of your selections, just click Next.
To reach this screen for editing:
1. Click Server Settings on the Main Menu.
2. Click Roles and Protocols in the steps list.

To choose roles and protocols:
1. Select your federation role(s) and then select at least one protocol.

   Note: SaaS Provisioning requires the use of the SAML 2.0. (For more information, refer to the Quick Connection Guide contained in the PingFederate SaaS Connector package for your service provider.)

2. (Optional) If you are using SAML 2.0 and want to configure Auto-Connect, select that feature for your role(s) (see “Using Auto-Connect” on page 19).

   Note: Clearing this checkbox does not deactivate an existing Auto-Connect configuration in production. If you have already deployed Auto-Connect and wish to suspend the deployment for any reason, use the Initial Setup Summary screens (accessible from the Main Menu) for your respective role.

When you make this selection, two additional steps are added to the System Settings task:

- Metadata Signing (see “Configuring Auto-Connect Metadata Signing” on page 68)
- Metadata Lifetime (see “Configuring Auto-Connect Metadata Lifetime” on page 69).

3. (Optional) If you are using PingFederate as an IdP and have installed a SaaS Connector package, select the SaaS Provisioning checkbox.
   (For more information, see “SaaS Provisioning” on page 22.)

   Note: After provisioning is configured for a connection, you cannot clear this checkbox—you must delete all provisioning configurations first. To suspend provisioning for an SP partner, you can deactivate the specific configuration (see “Channel Activation and Summary” on page 183). Alternatively, you can deactivate the associated SP connection; note, however, that this will also disable SSO/SLO transactions (see “Connection Activation and Summary” on page 184).

4. (Optional) If you are using SAML 2.0 XASP as an SP for multiple IdP connections, you may select the option to determine dynamically which
connection to use, based on the X.509 certificate presented (see “Attribute Requester Mapping” on page 202).

**Tip:** After you make this selection and create XASP IdP connections (see “Configuring the Attribute Query Profile” on page 159), configure dynamic IdP discovery via the **Attribute Requester Mapping** link on the Main Menu. Once the mapping is configured, you cannot clear the checkbox on the Roles and Protocols screen unless you first delete the mapping.

For general information about XASP, see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started.

5. Click **Next** (or **Save**, if you are modifying existing selections).

For information about configuring settings associated with your selections, see these relevant portions of this manual:

- Chapter 5, “Identity Provider Configuration”
- Chapter 6, “Service Provider Configuration”
- “Configuring IdP Discovery” on page 81

## Specifying Federation Information

This information identifies your federation deployment to your partners, according to the protocol(s) you support.

**Note:** You must provide an ID that uniquely identifies your federation gateway for each protocol you support. Each ID normally applies across all connection partners for a given protocol; however, if your implementation requires different IDs for the same protocol, you can use virtual server IDs (see “Federation Server Identification” on page 16).

You can also use a different ID for Auto-Connect transactions (see “Using Auto-Connect” on page 19).
### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base URL</strong></td>
<td>The fully qualified host name, port, and path (if applicable) on which the PingFederate server runs. This field is used to populate configuration settings in metadata files (see “Exporting Metadata” on page 30).</td>
</tr>
<tr>
<td><strong>SAML 2.0 Entity ID</strong></td>
<td>This ID defines your organization as the entity operating the server for SAML 2.0 transactions. It is usually defined as an organization's URL or a DNS address; for example: pingidentity.com. The SAML SourceID used for artifact resolution is derived from this ID using SHA1.</td>
</tr>
<tr>
<td><strong>Auto-Connect Entity ID</strong></td>
<td>(Optional) If you are using Auto-Connect, you can specify a unique ID here for Auto-Connect processing. The value must be a fully qualified URL and should match the CN of your Auto-Connect certificates (see “Auto-Connect Security Model” on page 21). When a value is supplied, this ID is used instead of the SAML 2.0 Entity ID in your server’s Auto-Connect metadata, as well as in associated SSO/SLO requests and responses. Use this field if you have configured regular, static SAML 2.0 connections to other partners and your SAML 2.0 Entity ID is not a fully qualified URL (see “Using Auto-Connect” on page 19).</td>
</tr>
</tbody>
</table>
Managing Server Settings

To reach this screen:
1. Click Server Settings on the Main Menu.
2. Click Federation Info in the steps list.

Configuring SaaS Provisioning Settings

On the SaaS Provisioning screen, you can select the database that PingFederate uses internally to facilitate provisioning for SaaS providers when PingFederate is configured as an IdP (see “SaaS Provisioning” on page 22).

This screen is presented only if you have installed a SaaS Connector package and SaaS Provisioning is enabled for the IdP federation role (see “Choosing Roles and Protocols” on page 63).

Caution: A pre-installed, default Hypersonic database is selected for initial setup and testing. However, we strongly recommend that you choose your own, secured database for production deployments.

On this screen, you can also change the provisioning synchronization frequency—that is, how often PingFederate checks the local user store for changes.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAML 1.x ID</td>
<td>This ID identifies your federation server for SAML 1.x transactions. As with SAML 2.0, it is usually defined as an organization's URL or a DNS address. The SourceID used for artifact resolution is derived from this ID using SHA1.</td>
</tr>
<tr>
<td>SAML 1.x Source ID</td>
<td>(Optional) If supplied, the Source ID value entered here is used for SAML 1.x, instead of being derived from the SAML 1.x Issuer/Audience.</td>
</tr>
<tr>
<td>WS-Federation Realm</td>
<td>The URI of the realm associated with the PingFederate server. A realm represents a single unit of security administration or trust.</td>
</tr>
</tbody>
</table>

Note: The fields available on this screen depend on the federation protocols enabled on your server (see “Choosing Roles and Protocols” on page 63).
Chapter 3
System Settings

The database is used to record the state of the local user store, enabling periodic checking to determine whether updates are required at the target SaaS site. (For information on configuring provisioning as an IdP, see “Configuring SaaS Provisioning” on page 172.)

To configure the internal data store:

1. Select the data store from the drop-down list. If the data store you want is not shown in the list, then PingFederate is not yet configured to access the store; click **Manage Data Stores** to create a connection to the data store (see “Managing Data Stores” on page 70).

2. (Optional) Change the Synchronization Frequency value.

Configuring Auto-Connect Metadata Signing

When Auto-Connect is enabled, PingFederate generates publicly available, signed metadata for partners to use. The metadata contains information about your server configuration (see “Providing Metadata” on page 20).
On the Metadata Signing screen, you choose a certificate to use for signing the metadata.

**Important:** The certificate CN must match the domain name associated with the Entity ID configured in the previous screen (see “Specifying Federation Information” on page 65).

This screen appears only if Auto-Connect is enabled for either an IdP or SP (see “Choosing Roles and Protocols” on page 63).

If you have not yet imported the certificate you want, click Manage Certificates (see “Security Management” on page 87).

**Note:** The signing certificate is included as part of the public metadata and must be trusted by your partner (see “Auto-Connect Security Model” on page 21).

**Configuring Auto-Connect Metadata Lifetime**

Partners using Auto-Connect metadata will cache it to use for the future requests during the “lifetime” in which the metadata is valid, as configured on the Metadata Lifetime screen. After the metadata lifetime is expired, the metadata is retrieved again.

This metadata expiration ensures that partners always have reasonably up-to-date information about your server. You may elect to use the default time period or change it on the Metadata Lifetime screen.
Chapter 3
System Settings

Saving and Editing Server Settings

On the Server Settings Summary screen you can view, edit, and save your configuration.

- Click Save if you are finished with this configuration, or click any heading to make changes.

Managing Data Stores

PingFederate can connect to local data stores to retrieve user attributes on either the IdP or SP side of an SSO transaction (or both).

**Tip:** Whenever attributes are retrieved from a data store at runtime, PingFederate logs the activity (see “Log File Generation” on page 27). When you set up access to a data store, you can choose to mask the values of all retrieved attributes in the log files to enhance security and privacy of personal information (see “Attribute Masking” on page 10).

As an IdP, you use this feature whenever you need to fulfill an attribute contract that requires information beyond that which can be derived from the user’s session (see “Configuring Attribute Sources and User Lookup” on page 131). For example, this information may include such attributes as an email address, a job title, or any data that can be used to customize a user’s experience at the SP site.

As an SP, you can use data stores to retrieve additional attributes to package with the IdP’s assertion data to meet SP adapter requirements (see “Integration Kits and Adapters” on page 7). Such attributes may be needed, for example, to establish authorization levels or to manage the local account.

Either IdP or SP organizations configuring PingFederate for user provisioning must set up connections to data stores (see “User Provisioning” on page 22).

You can add data stores at any time. Standard data stores include JDBC-enabled databases and LDAP v3-compliant directories. Alternatively, you can develop a driver using the PingFederate Custom Source SDK to connect to non-JDBC...
Managing Data Stores

databases (see the PingFederate SDK Developer’s Guide in the pingfederate/sdk directory).

**Note:** You cannot delete or modify a data-store connection if it is associated with an attribute source as part of a partner-connection configuration. You must remove the association first.

To reach this screen:
- Click Data Stores on the Main Menu.

To add a data store:
1. Click Add New Data Store.
2. Select Database, LDAP, or Custom and click Next.
3. Continue the configuration:
   - For Database configuration information see “Configuring a JDBC Database Connection” on page 72.
   - For LDAP configuration information see “Configuring an LDAP Connection” on page 76.
   - For Custom configuration information see “Configuring a Custom Data Store” on page 79.
4. Click Save when you return to this screen.

**Important:** Note this step; be sure to click Save.

To modify a data store:
- Click the data store Description.
  - For Database configuration information see “Configuring a JDBC Database Connection” on page 72.
  - For LDAP configuration information see “Configuring an LDAP Connection” on page 76.
For Custom configuration information see “Configuring a Custom Data Store” on page 79.

**Important:** You must have current connectivity from PingFederate to a data store in order to create or modify the configuration. If you find that the configuration is not editable, then your connection has been lost due to a system problem not related to the PingFederate server. The problem must be identified and corrected before you can continue.

To delete a data store:
1. Click **delete** under Action for the data store you want to delete.
   (To undo the deletion, click **undelete**.)
2. Click **Save**.

**Configuring a JDBC Database Connection**

You configure access to a database by providing basic JDBC information.

**Note:** Ensure that your database driver JAR file is installed in the `pingfederate/server/default/lib` directory. You must restart the server after installing the driver.
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>JDBC URL</td>
<td>The location of the JDBC database. For example, jdbc:mysql://databaseservername/databasename where databaseservername is the DNS host name (or IP) of the server hosting the database, and databasename is the name of a database on that server.</td>
</tr>
<tr>
<td>Driver Class</td>
<td>The name of the driver class used to communicate with the source database. For example, org.hsqldb.jdbcdriver. This class should supplied by the database software vendor in a JAR file, which must be present in the pingfederate/server/default/lib directory.</td>
</tr>
<tr>
<td>Username</td>
<td>The name that identifies the user when connecting to the database.</td>
</tr>
<tr>
<td>Password</td>
<td>The password needed to access the database.</td>
</tr>
<tr>
<td>Mask Values in Log</td>
<td>(Optional) Determines whether all attribute values returned from this data store will be masked in PingFederate log files (see “Attribute Masking” on page 10).</td>
</tr>
<tr>
<td>Validate Connection SQL</td>
<td>(Optional, but recommended) An SQL statement used by JBoss at runtime to validate that the connection is still active. Refer to your JDBC or JBoss documentation for more information.</td>
</tr>
</tbody>
</table>

To reach this screen:
1. Click Data Stores on the Main Menu.
2. Click the Data Store Description link on the Manage Data Stores screen.

To configure a new data store:
1. Click Data Stores on the Main Menu.
2. Click Add New Data Store.
3. Select Database and click Next.

To establish access to a database:
1. Enter the applicable JDBC URL.
   This URL is used to identify the data store in lists. Example: jdbc:mysql://10.0.1.81:3306/idp
2. Enter the Driver Class.
   Example: com.mysql.jdbc.Driver

   ![Note: The driver JAR file must be loaded into the directory:
   pingfederate/server/default/lib]

3. Enter a valid Username and Password.
4. (Optional) Select Mask Values in Log.
   For information see “Attribute Masking” on page 10.
5. (Optional) Click Advanced.
   Use this option to change default sizes or look-up time-outs, or to validate the connection using a specific SQL call (see “Setting Advanced Options” on page 74).
6. Click Next.

   ![Note: PingFederate will try to connect to the database at this point. If it cannot, there may be a problem with your settings.]

7. On the Summary screen, click Done.
8. Click Save on the Manage Data Stores screen.

**Setting Advanced Options**

Use the Advanced Database Options screen to change default pool sizes or look-up time-outs, or to validate the connection using a specific SQL call.

![Advanced Database Options](image)
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Pool Size</td>
<td>The smallest number of database connections in the connection pool for the given data store.</td>
</tr>
<tr>
<td>Maximum Pool Size</td>
<td>The largest number of database connections in the connection pool for the given data store.</td>
</tr>
<tr>
<td>Blocking Timeout (ms)</td>
<td>The amount of time a request waits to get a connection from the connection pool before it fails.</td>
</tr>
<tr>
<td>Idle Timeout (ms)</td>
<td>The length of time the connection can be idle in the pool before it is closed.</td>
</tr>
</tbody>
</table>

To reach this screen for editing:
1. Click Data Stores on the Main Menu.
2. Click the Data Store Description link on the Manage Data Stores screen.
3. Click the Advanced button on the Database Config screen.

To configure a new data store:
1. Click Data Stores on the Main Menu.
2. Click Add New Data Store.
3. Select Database and click Next.
4. Enter information on the Database Config screen and click the Advanced button.

Internally, PingFederate is preconfigured to use published JBoss server default values. To view or restore these values, click Apply Defaults.
Configuring an LDAP Connection

This screen establishes a connection between the PingFederate server and an LDAP data store.

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hostname</td>
<td>The DNS name or IP address of the data store, which may include a port number; example: 181.20.42.130:389.</td>
</tr>
<tr>
<td>LDAP Type</td>
<td>If you are using this data store for SaaS Provisioning and your LDAP store is either Active Directory or Sun Directory Server, select the applicable Type (see “SaaS Provisioning” on page 22). Identifying the LDAP type permits PingFederate to configure many provisioning settings automatically (see “Modifying Source Settings” on page 176). Tip: If you are using SaaS Provisioning and your LDAP server is not Active Directory or Sun, you may wish to define a custom LDAP Type to streamline the provisioning configuration (see “Defining an LDAP Type” on page 78). If you are not using SaaS Provisioning, the selection of an LDAP Type has no effect.</td>
</tr>
<tr>
<td>Bind Anonymously</td>
<td>(Checkbox) Username and password are not required (see procedure below).</td>
</tr>
<tr>
<td>User DN</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Use SSL</td>
<td></td>
</tr>
<tr>
<td>Mask Values in Log</td>
<td></td>
</tr>
</tbody>
</table>
To establish a connection to an LDAP data store:

1. Enter the applicable Hostname.
   This can be a valid DNS name or IP address and may include a port number.
   The hostname is also used to identify this data store in selection lists elsewhere in the administrative console.

2. (Optional) Select an LDAP Type from the drop-down list.
   For more information, see the description for this selection in the table above.

3. Either:
   - Check Bind Anonymously if your LDAP interface supports anonymous binding and if no credentials are needed to access the data store.
   Or:
   - Enter a valid User DN and Password.

   **Note:** If you choose an anonymous binding, ensure that this access level is sufficient to retrieve the user data needed for SSO transactions.

4. (Optional) Select Use SSL.
   For more information, see the description for this selection in the table above.
5. (Optional) Select Mask Values in Log.
   For more information, see the description for this selection in the table above.

6. Click **Next**.
   PingFederate will try to connect to the LDAP server at this point. If it cannot, there may be a problem with your settings.

7. On the Summary screen, click **Done**.

8. Click **Save** on the Manage Data Stores screen.

### Defining an LDAP Type

If you are using SaaS Provisioning and your user-management LDAP server is not Active Directory or the Sun Directory Server, you can define a custom LDAP Type for PingFederate to use to streamline the SaaS provisioning configuration (see “SaaS Provisioning” on page 22).

When the LDAP server is defined, its type appears in the **LDAP Type** drop-down list on the **LDAP Configuration** screen (see previous section). When the data store is selected as the source for provisioning, a number of other settings can be automatically configured (see “Modifying Source Settings” on page 176).

**To define an LDAP Type:**

1. If you are using the LDAP Configuration screen, click **Previous** or **Cancel**.

2. Copy and rename the file `sample.template.txt`:
   ```
   <pf_install>/pingfederate/server/default/conf/template/ldap-templates
   ```

3. Change the `template.name` in the new template file.
   The `template.name` you specify will appear in the **LDAP Type** list on the **LDAP Configuration** screen when you save the template.

4. Modify other property values in the file to match the corresponding configuration of your LDAP server.
   The properties are used in the SaaS Provisioning setup (see “Modifying Source Settings” on page 176).

5. Save the new template file.

### Setting Pooling Options

LDAP connection pooling is maintained by the Java runtime environment. Normally, default settings are optimal. However, if you need to customize pooling for particular applications, you can find a list of the properties controlling pooling at:

```
```

Using the format `<prop_name>=<value>`, enter any of the properties into the `run.properties` file located in the directory:
```
<pf_install>/pingfederate/bin
```
Configuring a Custom Data Store

Developers can use the PingFederate Custom Source SDK to create specific drivers for non-JDBC/LDAP data stores (or more sophisticated JDBC/LDAP lookups) including, for example, flat files or SOAP-connected databases (see the PingFederate SDK Developer’s Guide in the pingfederate/sdk directory).

Once the data-store driver is installed, you can select it on the Custom Data Store Type page.

To start configuring a Custom Data Store:

1. Enter a unique Instance Name.
   You can create more than one instance of the same Data Store Type for use with different connection partners, as needed.

2. Select the Data Store Type.

3. (Optional) Select Mask Values in Log.
   For information see “Attribute Masking” on page 10.

4. Click Next.

Configuring a Custom Data Store Instance

This screen will vary depending on the implementation. Below is a sample for a SOAP-enabled database driver. The screen shown below is only an example of a custom data store and is not available in the PingFederate distribution.
Chapter 3
System Settings

To configure the driver instance for use with a partner connection:
- Enter or select required information and click **Next**.

**Invoking Adapter Actions**

Custom data store adapters may be written to interface PingFederate to perform configuration assistance or validation actions (for example, testing a connection to a database). Actions may also include generation of parameters that might need to be set manually in a configuration file.
- To invoke an adapter action (when applicable), click its link on the Adapter Actions screen.

**Editing and Saving a Data Store**

On the Data Store Summary page, you can view or edit your configuration.

**To modify the configuration:**
- Click the heading above the information you want to change.

**To save a new configuration:**
- Click **Done** on the Summary screen and then **Save** on the Manage Data Stores screen.
Configuring IdP Discovery

PingFederate provides two kinds of IdP discovery:

- SAML 2.0 standard IdP Discovery (see “IdP Discovery” in the “Supported Standards” chapter of Getting Started)
- Proprietary IdP discovery using an persistent cookie written by an SP PingFederate server

Standard IdP Discovery is configured in the administrative console (see the next section).

Discovery based on a PingFederate proprietary cookie is configured in an XML file (see “IdP Discovery Using a Persistent Cookie” on page 84). Note that this method can be used in conjunction with any of the federation standards.

Standard IdP Discovery

SAML IdP Discovery provides a cookie-based look-up mechanism used to identify a user's IdP dynamically during an SP-initiated SSO event, when the IdP is not otherwise specified. To enable this feature, IdP Discovery must be selected on the Roles and Protocols screen in the System Settings configuration (see “Choosing Roles and Protocols” on page 63). Then click IdP Discovery under System Settings on the Main Menu to reach this screen:

For an overview of this SAML 2.0 profile, see “IdP Discovery” in the “Supported Standards” chapter of Getting Started.

To continue, click Configure IdP Discovery.

Choosing Domain Cookie Settings

On the Domain Cookie Settings screen, you choose the discovery role or roles that PingFederate will play.
Chapter 3
System Settings

The choices that appear on this screen depend on whether PingFederate is acting as an SP, an IdP, or both; or as an IdP Discovery server only (see “Choosing Roles and Protocols” on page 63).

**To reach this screen:**

1. Click **IdP Discovery** under System Settings on the Main Menu.
   If this link is not available, then IdP Discovery is not yet enabled (see “Choosing Roles and Protocols” on page 63).

2. On the IdP Discovery screen, click **Configure IdP Discovery**.

For a detailed discussion of selections on this screen, see “IdP Discovery” in the “Supported Standards” chapter of Getting Started.

**Configuring a Common Domain Service**

A Common Domain Service is where PingFederate reads and/or writes authentication information contained in shared cookies, as determined by whether your site is an SP or IdP, respectively. (The service is shared if your PingFederate server is acting in both roles.)
Configuring IdP Discovery

To reach this screen:
1. Click **IdP Discovery** under System Settings on the Main Menu.
   If this link is not available, then IdP Discovery is not yet enabled (see “Choosing Roles and Protocols” on page 63).
2. On the IdP Discovery screen, click **Configure IdP Discovery**.
3. Click **Common Domain Service** in the steps list.
   This step is not available if your server is configured for IdP Discovery only (see “Choosing Roles and Protocols” on page 63).

To configure the Common Domain Service:
1. Enter the **Base URL**.
   You must use SSL/TLS (**HTTPS**) for a common domain.
2. Enter and confirm a **Pass phrase** that a Web application must use to access the domain.

Configuring a Local Common Domain Server

A Local Common Domain Server is where PingFederate reads (as an SP) or writes (as an IdP) cookies for IdP Discovery.

To reach this screen:
1. Click **IdP Discovery** under System Settings on the Main Menu.
   If this link is not available, then IdP Discovery is not yet enabled (see “Choosing Roles and Protocols” on page 63).
2. On the IdP Discovery screen, click **Configure IdP Discovery**.
3. Click **Local Common Domain Server** in the steps list.
   This step is available only if the common-server option is selected under Domain Cookie Settings (see “Configuring IdP Discovery” on page 81).
To configure the Local Common Domain Server:

1. Enter the Common Domain.
   
   Your entry must include an initial period (.), for example: .pingidentity.com

2. Enter the Cookie Lifetime.
   
   The range is 1 to 1,825 days; or to indicate a nonpersistent, session cookie, enter -1.

3. Enter and confirm a Pass phrase that a Web application must use to access the domain.

Editing and Saving the Configuration

After configuring or modifying IdP Discovery settings, you can review the configuration on the Summary screen.

- If you are finished with the configuration, click Save; otherwise, click any heading to make changes.

IdP Discovery Using a Persistent Cookie

PingFederate’s proprietary IdP-discovery method makes use of an IdP Persistent Reference Cookie (IPRC) to track the identity provider with whom a user last authenticated. There are three significant differences between standard IdP Discovery and the IPRC method:

- Standard IdP Discovery may be used only with SAML 2.0; the IPRC may be used with any federation protocol.

- The Common Domain Cookie (CDC) may be configured as a temporary, session-based cookie; the IPRC always persists for a configurable period of time.

- The CDC is set by the IdP and readable by both federation partners; the IPRC is set by the SP, using information in the SAML assertion, and cannot be accessed by the IdP.

Configuration

Enable the IPRC feature for your SP site using the configuration file org.sourceid.webssoprofiles.sp.IdpIdCookieSupport.xml located in the directory <pf_install>/pingfederate/server/default/data/config-store.

Note that the deployed connection configuration between SP and IdP partners must include SP-initiated SSO (see “Configuring Web SSO” on page 235).

To enable IPRC:

1. In the XML configuration file cited above, set the value of EnableIdpIdCookie to true.
2. (Optional) Change the default value(s) of any of the remaining elements in the configuration, as described in the following table:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IdpldCookieName</td>
<td>The name of the IPRC set by the SP installation (default: IdPId). Note that the cookie name cannot contain any of the following characters: &amp; &gt; &lt;, comma, semicolon, space.</td>
</tr>
<tr>
<td>IdpldCookieLifeTimeInDays</td>
<td>The maximum lifetime for the cookie (default 365 days). The browser will delete the cookie when the period is expired.</td>
</tr>
<tr>
<td>ShowIdpSelectionList</td>
<td>If set to true (the default), the SP displays a list of IdPs that can be used to initiate the SSO event if the cookie is not set. If set to false, the SP installation generates an error page.</td>
</tr>
</tbody>
</table>

3. Start or restart PingFederate.

**Note:** Once an IPRC cookie is set, the only way to change the IdP to whom the SP will send Authentication Requests for the user is to do one of the following: wait for the cookie to expire, delete the cookie, or perform IdP-initiated SSO using the new IdP.
PingFederate provides built-in certificate management to handle security considerations for SAML transactions. In addition, when you use the SAML 2.0 Attribute Query profile as an SP, password security is required between the application requesting attributes and the SP PingFederate server. Basic authentication is also required for applications making calls to PingFederate's Connection Management Service and optional for the SSO Directory Service (see “Web Service Interfaces” on page 299).

You manage certificates and application authentication via the Security section under My Server on the Main Menu.

### Security

- **Trusted CAs**
- **SSL Server Certificates**
- **SSL Client Keys & Certificates**
- **Digital Signing & XML Decryption Keys & Certificates**
- **Application Authentication**
- **Certificate Revocation Checking**

---

**Note:** The information in this chapter is presented from the viewpoint of an administrative user with “Crypto Admin” permissions (see “Account Management” on page 36).

### Trusted CAs

You can import your federation partner's CA-signed or self-signed SSL/TLS server certificate(s) into PingFederate's global trust list. If the CA is not one of
the major authorities, you may also need to import the certificate from the Certificate Authority that signed the certificates into the global trust list.

To reach this screen:

- Click Trusted CAs on the Main Menu.

To import a certificate:

1. Click Import.
2. Click Browse to locate the certificate.
3. Highlight the file and click Open.
4. Click Next.
5. Click Done.
6. Click Save on the Manage Trusted CAs screen.

To export a certificate:

1. Click Export under Action for the certificate you want to export.
2. On the Summary page, click the Export button.
3. Save the file on your system.

To delete a certificate:

1. Click Delete under Action for the certificate you want to delete. To undo the deletion, click Undelete.
2. Click Save.

To view certificate details:

- Click the certificate Serial number.
SSL Server Certificates

PingFederate provides built-in SSL/TLS certificate management. Use this feature to establish and maintain the certificate that your PingFederate server presents to any incoming SSL/TLS connections.

To reach this screen:

- Click SSL Server Certificates on the Main Menu.

To create a new certificate:

1. Click Create New.
2. Enter the requested information on the form.
3. Click Next.
4. On the Summary screen, click Done.
5. Click Save on the Manage SSL Server Certificates screen.

To import a certificate and private key:

1. Click Import.
2. Click Browse to locate the certificate.
3. Highlight the file and click Open.
4. Enter the certificate password.
5. Click Next.
6. Click Done.
7. Click Save on the Manage SSL Server Certificates screen.

To view certificate information:

- Click its Serial number.
Note: If a certificate has been revoked, PingFederate indicates this problem in the certificate information window.

To activate a certificate:
1. Click Activate under Action for the certificate you want to activate.
   This function is available only if you have more than one certificate. It will appear for any inactive certificates. You can have only one active SSL server certificate.
2. Click Save on the Manage SSL Server Certificates screen.

To export a certificate:
1. Click Export under Action for the certificate you want to export.
   Or:
   Select Certificate and Private Key and enter an Encryption Password.
3. Click Next.
5. Save the file on your system and click Done.

To create a certificate-authority signing request:
1. Click Certificate Signing under Action for the desired certificate.
   Note: This selection is inactive if you have not yet saved a newly created or imported certificate. Click Save and then return to this screen from the Main Menu.
2. Select Generate Certificate Signing Request (CSR), if not already selected.
3. Click Next.
4. Click Generate CSR on the Generate CSR screen.
5. Click Next.
7. Save the file on your system and click Done.

To import a certificate authority response:
1. Click Certificate Signing under Action for the relevant certificate.
2. Select Import CSR Response and click Next.
3. Click Browse and locate the CSR response to import.
4. Highlight the file and click Open.
5. Click Next.
SSL Server Certificates

6. Click **Done** on the Summary screen.
7. Click **Save** on the Manage SSL Server Certificates screen.

**To delete a certificate:**
1. Click **Delete** under Action for the certificate you want to delete.
   To undo the deletion, click **Undelete**.
2. Click **Save**.

**Create Certificate Field Descriptions**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Name</td>
<td>The common name (CN) identifying the certificate.</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization (O) or company name creating the certificate.</td>
</tr>
<tr>
<td>Organizational Unit</td>
<td>The specific unit within the organization (OU).</td>
</tr>
<tr>
<td>City</td>
<td>The city or other primary location (L) where the company operates.</td>
</tr>
<tr>
<td>State</td>
<td>The state (ST) or other political unit encompassing the location.</td>
</tr>
<tr>
<td>Country</td>
<td>The country (C) where the company is based.</td>
</tr>
<tr>
<td>Validity (days)</td>
<td>The time during which the certificate is valid.</td>
</tr>
<tr>
<td>Key Algorithm (drop-down menu)</td>
<td>A mathematical formula used to generate a key. PingFederate uses either of two algorithms, RSA or DSA.</td>
</tr>
<tr>
<td>Key Size (bits)</td>
<td>The number of bits used in the key. (RSA-768 to 2048, DSA-768 and 1024)</td>
</tr>
</tbody>
</table>
SSL Client Keys & Certificates

You can create and manage your authentication private keys and the certificates your server presents as a client in an SSL/TLS transaction.

To reach this screen:

- Click SSL Client Keys & Certificates on the Main Menu.

To create a new certificate:

1. Click Create New.
2. Enter the information on the form.
3. Click Next.
4. On the Summary screen, click Done.
5. Click Save on the Manage SSL Auth Private Keys and Certificates screen.

To import a certificate:

1. Click Import.
2. Click Browse to locate the certificate.
3. Highlight the file and click Open.
4. Enter the certificate password.
5. Click Next.
6. Click Done on the Import Certificate Details screen.
7. Click Save on the Manage SSL Auth Private Keys and Certificates screen.

To view certificate information:

- Click the certificate Serial number.

Note: If a certificate has been revoked, PingFederate indicates this problem in the certificate information window.
To export a certificate:
1. Click Export under Action for the certificate you want to export.
2. Select Certificate Only.
   Or:
   Select Certificate and Private Key and enter an Encryption Password.
3. Click Next.
5. Save the file on your system and click Done.

To create a certificate-authority signing request:
1. Click Certificate Signing under Action for the desired certificate.

   Note: This selection is inactive if you have not yet saved a newly created or imported certificate. Click Save and then return to this screen from the Main Menu.

2. Select Generate Certificate Signing Request (CSR), if not already selected.
3. Click Next.
4. Click Generate CSR on the Generate CSR screen.
5. Click Next.
7. Save the file on your system and click Done.

To import a certificate authority response:
1. Click Certificate Signing under Action for the relevant certificate.
2. Select Import CSR Response and click Next.
3. Click Browse and locate the CSR response to import.
4. Highlight the file and click Open.
5. Click Next.
6. Click Done on the Summary screen.
7. Click Save on the Manage SSL Auth Private Keys and Certificates screen.

To delete a certificate:
1. Click Delete under Action for the certificate you want to delete.
   (To undo the deletion, click Undelete.)
2. Click Save.
Create Certificate Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Name</td>
<td>The common name (CN) identifying the certificate.</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization (O) or company name creating the certificate.</td>
</tr>
<tr>
<td>Organizational Unit</td>
<td>The specific unit within the organization (OU).</td>
</tr>
<tr>
<td>City</td>
<td>The city or other primary location (L) where the company operates.</td>
</tr>
<tr>
<td>State</td>
<td>The state (ST) or other political unit encompassing the location.</td>
</tr>
<tr>
<td>Country</td>
<td>The country (C) where the company is based.</td>
</tr>
<tr>
<td>Validity (days)</td>
<td>The time during which the certificate is valid.</td>
</tr>
<tr>
<td>Key Algorithm (drop-down menu)</td>
<td>A mathematical formula used to generate a key. PingFederate uses either of two algorithms, RSA or DSA.</td>
</tr>
<tr>
<td>Key Size (bits)</td>
<td>The number of bits used in the key. (RSA-768 to 2048, DSA-768 and 1024)</td>
</tr>
</tbody>
</table>

Digital Signing and Decryption Keys & Certificates

You can use PingFederate to create and maintain your server's signing certificates, which you may use to sign SAML requests, responses, and assertions. You can also use these certificates for XML decryption (“XML Encryption” on page 15).

To reach this screen:

- Click Digital Signing & XML Decryption Keys & Certificates on the Main Menu.
To create a new certificate:
1. Click Create New.
2. Enter the information on the form.
3. Click Next.
4. On the Summary screen, click Done.
5. Click Save.

To import a certificate:
1. Click Import.
2. Click Browse to locate the certificate.
3. Highlight the file and click Open.
4. Enter the certificate password.
5. Click Next.
6. Click Done.
7. Click Save.

To view certificate information:
- Click the certificate Serial number.

Note: If a certificate has been revoked, PingFederate indicates this problem in the certificate information window.

To export a certificate:
1. Click Export under Action for the certificate you want to export.
2. Select Certificate Only.
   Or:
   Select Certificate and Private Key and enter an Encryption Password.
3. Click Next.
5. Save the file on your system and click Done.

To create a certificate-authority signing request:
1. Click Certificate Signing under Action for the desired certificate.

Note: This selection is inactive if you have not yet saved a newly created or imported certificate. Click Save and then return to this screen from the Main Menu.

2. Select Generate Certificate Signing Request (CSR), if not already selected.
3. Click Next.
4. Click **Generate CSR** on the Generate CSR screen.
5. Click **Next**.
6. On the Certificate Summary screen, click **Export**.
7. Save the file on your system and click **Done**.

**To import a certificate authority response:**
1. Click **Certificate Signing** under Action for the relevant certificate.
2. Select Import CSR Response and click **Next**.
3. Click **Browse** and locate the CSR response to import.
4. Highlight the file and click **Open**.
5. Click **Next**.
6. Click **Done** on the Summary screen.
7. Click **Save** on the Manage Digital Signing Certificates screen.

**To delete a certificate:**
1. Click **Delete** under Action for the certificate you want to delete.
   (To undo the deletion, click **Undelete**.)
2. Click **Save**.

**Create Certificate Field Descriptions**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Name</td>
<td>The common name (CN) identifying the certificate.</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization (O) or company name creating the certificate.</td>
</tr>
<tr>
<td>Organizational Unit</td>
<td>The specific unit within the organization (OU).</td>
</tr>
<tr>
<td>City</td>
<td>The city or other primary location (L) where the company operates.</td>
</tr>
<tr>
<td>State</td>
<td>The state (ST) or other political unit encompassing the location.</td>
</tr>
<tr>
<td>Country</td>
<td>The country (C) where the company is based.</td>
</tr>
<tr>
<td>Validity (days)</td>
<td>The time during which the certificate is valid.</td>
</tr>
<tr>
<td>Key Algorithm (drop-down menu)</td>
<td>A mathematical formula used to generate a key. PingFederate uses either of two algorithms, RSA or DSA.</td>
</tr>
<tr>
<td>Key Size (bits)</td>
<td>The number of bits used in the key. (RSA-768 to 2048, DSA-768 and 1024)</td>
</tr>
</tbody>
</table>
Application Authentication

If you are using the SAML 2.0 Attribute Query profile as an SP, then the requesting application(s) at your site must authenticate to the PingFederate server (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started and “/sp/startAttributeQuery.ping” on page 296).

In addition, authentication is required to access PingFederate runtime data via JMX (see “Runtime Monitoring Using JMX” on page 60) or to make SOAP calls to the Connection Management Web Service. Authentication is optional for the SSO Directory Service (see “Web Service Interfaces” on page 299).

Note: To help ensure network security, access to all of these services is deactivated when PingFederate is first installed.

Administrators can activate and configure authentication for any or all of the services on the Application Authentication screen.

To reach this screen:


To enable access to a service:

1. Click Activate for the Service under Action.
2. Where required, enter an Id, Shared Secret, and Confirm Shared Secret for the service.

   You and the application developer must agree to these values.

   This step is optional for the SSO Directory Service; the Service can be active without requiring authentication (the default setting).
3. Repeat the steps above for other Services, as needed.
4. Click **Save**.

**To change an application ID or password:**
- Replace the existing information in the necessary field(s) and click **Save**.

**To block access to an active service:**
- Click **Deactivate** for the Service under **Action** and then click **Save**.

**Certificate Revocation Checking**

By default at runtime, PingFederate attempts to retrieve a CRL to verify that a signing certificate has not been revoked, whenever a CRL distribution-point URL is included within the certificate (see “Certificate Validation” on page 12). Optionally, on the Manage Certificate Revocation screen you can enable and configure OCSP checking as the preferred verification method, depending on your requirements (see “OCSP Revocation Checking” on page 13).

OCSP can be used in place of CRL checking, or CRLs can be retained as a backup method (for failover).

**Note:** When OCSP is enabled, CRL checking is not done independently—only as a failover option for one or more OCSP failure conditions.

Also on the Manage Certificate Revocation screen, you can change system-default settings for CRL checking, as needed.
No configuration changes are necessary on this screen if OCSP is not required for your federation deployment and the CRL defaults are acceptable.

To reach this screen:
# Field Descriptions (For OSCP Checking)

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable OCSP</td>
<td>Turns on OCSP certificate-revocation checking.</td>
</tr>
<tr>
<td>Default OCSP Responder URL</td>
<td>The location of a URL to use for certificate-revocation checking, a backup used only if the OCSP Responder URL is not contained in the certificate.</td>
</tr>
<tr>
<td>Default OCSP Responder Signature</td>
<td>Certificate used to verify that the returned certificate status was sent from the Default OCSP Responder—required if the certificate is not included in the response (click Manage Certificates to import the verification certificate, as needed).</td>
</tr>
<tr>
<td>Do NOT allow Responder to use cached responses</td>
<td>When unchecked (the default), the OCSP Responder uses cached responses when available for the subject certificate (for an indicated period of time—see the description for “Next Update Grace Period,” below). If checked, PingFederate sends a nonce in the request to the Responder, effectively requiring that the status of the certificate be determined in real time. This option is intended to enhance the prevention of Internet replay attacks (in addition to timestamping), where required.</td>
</tr>
<tr>
<td>This Update Grace Period</td>
<td>For the response to be considered valid, the PingFederate server-clock time must correspond to the &lt;thisUpdate&gt; timestamp in the OCSP response, plus or minus the number of minutes set for this field (to compensate for clock variances).</td>
</tr>
<tr>
<td>Next Update Grace Period</td>
<td>If the response includes a &lt;nextUpdate&gt; timestamp indicating when updated certificate statuses will be available, then PingFederate checks to ensure that the timestamp is not earlier than the current server time, adding this grace period to compensate for clock variances.</td>
</tr>
<tr>
<td>Responder Timeout</td>
<td>The allowable response time before the OCSP Responder URL is considered unavailable and processing continues (see “OCSP Responder is Unavailable,” below).</td>
</tr>
<tr>
<td>Certificate is Unknown</td>
<td>The certificate does not fall under the purview of the CA associated with the OCSP Responder. The drop-down choices indicate whether an unknown certificate is to be considered valid or not, or whether to try CRL checking.</td>
</tr>
<tr>
<td>OCSP Responder is Unavailable</td>
<td>Indicates what action to take if the Responder cannot be reached.</td>
</tr>
</tbody>
</table>
### Field Descriptions (For CRL Checking)

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCSP Responder Returns Error</td>
<td>Indicates what action to take if the Responder returns an error.</td>
</tr>
<tr>
<td>Proxy Settings</td>
<td>If OCSP messaging is routed through a proxy server, specify the server’s Host (DNS name or IP address) and the Port number. The same proxy information applies to CRL checking, when CRL is enabled for failover.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable CRL Checking</td>
<td>Enables CRL revocation checking (the default).</td>
</tr>
<tr>
<td>Note: CRL checking must remain enabled if any selections for OCSP Error Handling include failover. If OCSP is enabled and no CRL failover is specified, then this selection has no effect.</td>
<td></td>
</tr>
</tbody>
</table>
| Treat Unretrievable CRLs as Revoked | If checked, PingFederate immediately aborts the processing associated with the certificate.  
If unchecked, the server treats the certificate as valid but continues trying to retrieve the CRL.                                 |
| Next Retry on Resolution Failure | Specifies the number of minutes the server waits before trying to retrieve a CRL when the previous attempt failed—applies only when the selection above (Treat Unretrievable CRLs as Revoked) is unchecked. |
| Next Retry on Next Update Expiration | How long the server waits before requesting a new CRL when the most recently retrieved CRL (in cache) has a next-update time in the past. |
| Verify CRL Signature          | When checked (recommended), PingFederate verifies the CRL signature using the public key of the issuer, which must be in the certificate chain or in the list of Trusted CAs (see “Trusted CAs” on page 87). |
| Proxy Settings                | If CRL checking is routed through a proxy server, specify the server’s Host (DNS name or IP address) and the Port number. The same proxy information applies to OCSP checking, when enabled. |
Identity Provider Configuration

In an IdP role, you use the PingFederate administrative console to configure local application-integration information and to manage connections to SAML or WS-Federation gateways located at your SP-partner sites. You must configure Server Settings from the Main Menu to establish your site as an IdP before configuring connections to SPs (see “Choosing Roles and Protocols” on page 63).

Note that you generally configure only one connection per federation partner, even if you are targeting more than one Web application at the destination SP site. You can configure more than one connection, however, if your partner supports multiple federation protocols, or supports multiple federation IDs for the same protocol (see “Federation Server Identification” on page 16).

Under some conditions, you can make secure Web SSO available to an unlimited number of partners at once by configuring a single, common connection (see “Using Auto-Connect” on page 19).

This chapter covers the following topics:
- “Application Integration Settings” on page 104
- “Viewing Protocol Endpoints” on page 110
- “Managing SP Connections” on page 112
- “Defining SP Affiliations” on page 185
- “Configuring SP Auto-Connect” on page 189
Chapter 5
Identity Provider Configuration

Application Integration Settings

The integration of local applications with PingFederate is the essential “first-mile” configuration that allows end-users to access protected resources across domains. This process is facilitated through the use of application-integration kits and a robust Software Development Kit (see “Integration Kits and Adapters” on page 7).

Under Application Integration Settings on the Main Menu, you configure the IdP Adapters that PingFederate needs to interact with applications or access-management systems used to authenticate users at your site. You can also set a Default URL to which users may be directed during SLO, and you can look up system endpoints that application developers at your site need to access PingFederate’s SSO/SLO services.

Configuring IdP Adapters

An IdP adapter is used to look up session information and provide user identification to PingFederate (see “Integration Kits and Adapters” on page 7).

You must configure at least one instance of an IdP adapter in order to set up connections to SP partners.

Note: If you are configuring either the OpenToken or the LDAP Adapter, see “Configuring the IdP OpenToken Adapter” on page 273 or “Configuring the IdP LDAP Adapter” on page 281, respectively.

You reach this screen by clicking Adapters under Application Integration Settings in My IdP Configuration.

To configure a new adapter instance:

Click Create New Adapter Instance.

To edit an existing adapter instance:

Click the Adapter Instance Name and click the step you need to change.
To delete an adapter instance:
1. Click **Delete** next to the **Adapter Instance Name**. (To undo the deletion, click **Undelete**.)

![Note: This option is available only if the adapter instance is not in use for a connection.]

2. Click **Save** to confirm the deletion.

Selecting an IdP Adapter Type

The first step in creating an adapter instance is choosing an adapter type. Available adapter types are determined by JAR files loaded in the `<pf_install>/pingfederate/server/default/deploy` directory. Some adapters are bundled with PingFederate (see “Integration Kits and Adapters” on page 7).

<table>
<thead>
<tr>
<th>Configuring IdP Adapter</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage IdP Adapter Instances</td>
<td>Create Adapter Instance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Adapter Type</strong></td>
<td>IdP Adapter</td>
<td>Unique Id Values</td>
<td>Summary</td>
<td></td>
</tr>
</tbody>
</table>

Enter an **Adapter Instance Name** and **Id**, and select the **Adapter Type**. The **Adapter Type** is limited to the adapters currently installed on your server.

<table>
<thead>
<tr>
<th><strong>Adapter Instance Name</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adapter Instance Id</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Adapter Type**

- **- SELECT -**
  - Visit PingIdentity.com
  - for additional adapter types

Field Descriptions

<table>
<thead>
<tr>
<th><strong>Field</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Adapter Instance Name</td>
<td>A descriptive name for the adapter instance—for example, an identity management system name.</td>
</tr>
<tr>
<td>Adapter Instance ID</td>
<td>An internal identifier for the adapter instance. Must be alphanumeric with no spaces.</td>
</tr>
<tr>
<td>Adapter Type</td>
<td>A list of deployed IdP adapter types available for creating an adapter instance for the server. A developer typically deploys any new adapter types before an administrator sets up a connection partner.</td>
</tr>
</tbody>
</table>

To define an adapter instance:
1. Enter the **Adapter Instance Name** and **Adapter Instance Id** on the **Adapter Type** screen.
2. Select the Adapter Type from the drop-down menu.
3. Click Next and enter information on subsequent screens for this adapter setup.

**Tip:** The setup steps and information needed at those steps vary with the adapters deployed on your server (see “Integration Kits and Adapters” on page 7). For information about configuring the adapters packaged with PingFederate, see “OpenToken Adapter Configuration” on page 271 or “LDAP Adapter Configuration” on page 279.

4. Click Done on the Adapter Summary screen.
5. Click Save on the Manage Adapter Instances screen.

**Configuring an IdP Adapter**

Depending on the adapter you choose, different configuration parameters are available on the IdP Adapter screen. These options are controlled by the adapter software (see “Integration Kits and Adapters” on page 7).

- For information about configuring the OpenToken Adapter, see “OpenToken Adapter Configuration” on page 271.
- For information about configuring the LDAP Authentication Service, see “LDAP Adapter Configuration” on page 279.

**Important:** If you change adapters that are used by existing partner connections, you may need to reconfigure those connections. If so, a **Fix Errors** link appears beside the adapter selection drop-down. Click the link to navigate to the screens you need to reconfigure. You cannot save the changes to the adapter until the existing connections have been repaired.

**Invoking Adapter Actions**

Adapters may be written to provide configuration assistance or validation actions (for example, testing a connection to LDAP). Actions may also include generation of parameters that might need to be set manually in a configuration file.

- For information about actions available using the OpenToken Adapter, see “Configuring the IdP OpenToken Adapter” on page 273.
- For information about actions available using the LDAP Authentication Service, see “Configuring the IdP LDAP Adapter” on page 281.
To reach this screen:
1. Click **Adapters** on the Main Menu.
2. Click an Adapter Instance Name on the Manage Adapter Instances screen.
3. Click **Adapter Actions** (if available).

To generate a properties list:
- Click **Generate properties** under Action Invocation Link.

**Extending an Adapter Contract**

Adapters may be written with an option allowing administrators to add to the attributes that the adapter returns from a user’s session. The PingFederate OpenToken Adapter, for example, provides such an option (see “OpenToken Adapter Configuration” on page 271).
2. Click an Adapter Instance Name.

3. Click **Extended Adapter Contract** (if available).

**To add an attribute:**

- Enter the attribute name in the text box and click **Add**.

### Setting Pseudonym Values and Masking

On the Adapter Attributes screen you must select attributes to use for generating a **pseudonym** identifier (see “Account Linking” on page 6).

Optionally on this screen, you can also choose to mask the values of any or all attributes that PingFederate logs from this adapter instance at runtime (see “Attribute Masking” on page 10).

To configure Pseudonym generation:

- Under **Pseudonym** select the value(s) to use.

**Note:** A selection is required regardless of whether you will use pseudonyms for account linking. This allows account linking to be used later without having to delete and reconfigure the adapter. Ensure that you choose at least one attribute that is unique for each user (for example, email) to prevent the same pseudonym from being assigned to multiple users.

To mask attributes in log files:

- Under **Mask Log Values** select the attribute(s) whose value(s) you want to mask.

To reach this screen:

1. Click **Adapters** on the Main Menu.
2. Click an Adapter Instance Name.
3. Click **Adapter Attributes**.
Selecting an Authentication Context

If you have deployed an integration kit that supports authentication context, you can specify the context in the IdP adapter configuration under Advanced Fields (see “Authentication Context” in the “Supported Standards” chapter of Getting Started).

For detailed information, see the OASIS SAML document: saml-authn-context-2.0-os.pdf.

- To enter an authentication context URI for an adapter that supports this feature, click Advanced Fields on the adapter configuration screen.

Editing and Saving Adapter Instances

From the Adapter Instance Summary screen, you can reach adapter settings for editing.

To edit the configuration:
1. Click the heading above the information you want to change.
2. Make your changes.
3. Click Save on the configuration page and on the Manage Adapter Instances screen.

To save an adapter instance:
1. Click Done on the Summary screen.
2. Click Save (or Next) on the Manage Adapter Instances screen.

Configuring a Default URL and Error Message

As an IdP, you can specify a default URL indicating a successful SLO to the end-user (if no other page is designated). On the IdP Default URL page, you can also customize an error message to be displayed as part of the error page rendered in the end-user’s browser if an error occurs during IdP-initiated SSO. For example, you might consider modifying the default text to include useful information regarding whom the user should contact or what their next step should be.

**Note:** The error message is displayed only when the application calling the start-SSO endpoint does not explicitly provide its own error page URL.
Your application or your partner’s application may supply the URL at runtime (see “IdP Endpoints” on page 289; but if none is provided, PingFederate will use the default value you enter on this screen.

Tip: If you leave the default URL blank, PingFederate provides a built-in landing page for the user. This Web page is among the templates you can modify with your own branding or other information (see “Customizing User-Facing Screens” on page 50).

Viewing Application Endpoints

Click Application Endpoints on the Main Menu to see a list of endpoints and descriptions applicable to your federation role (IdP or SP). These endpoints are built into PingFederate and cannot be changed.

Web-application developers at your site need to know the application endpoints to initiate transactions via PingFederate (see “Integration Kits and Adapters” on page 7).

Note: For specific parameters required or allowed for Application Endpoints, see “IdP Endpoints” on page 289.

This screen also shows a Maintenance Endpoint that you can use to verify that the PingFederate server is running (see “Maintenance Endpoint” on page 297).

Viewing Protocol Endpoints

Click Protocol Endpoints under Federation Settings in the IdP Configuration section of the Main Menu to see a list of SAML and/or WS-Federation
endpoints—a pop-up window displays only those endpoints related to the federation protocols you have chosen (see “Choosing Roles and Protocols” on page 63). These endpoints are built into PingFederate and cannot be changed.

Your federation partners need to know the applicable IdP Services endpoints to communicate with your PingFederate server. Configured service endpoints are included in metadata export files (see “Exporting Metadata” on page 30).

The table below describes each endpoint:

**Table 11: PingFederate IdP Endpoints**

<table>
<thead>
<tr>
<th>Service</th>
<th>URL and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Logout Service (SAML 2.0)</td>
<td><code>/idp/SLO.saml2</code>&lt;br&gt;The URL that receives and processes logout requests and responses.</td>
</tr>
<tr>
<td>Single Sign-on Service (SAML 2.0)</td>
<td><code>/idp/SSO.saml2</code>&lt;br&gt;The SAML 2.0 implementation URL that receives authentication requests for processing.</td>
</tr>
<tr>
<td>Artifact Resolution Service (SAML 2.0)</td>
<td><code>/idp/ARS.ssaml2</code>&lt;br&gt;The SOAP endpoint that processes artifacts returned from a federation partner to retrieve the referenced XML message on the back channel.</td>
</tr>
<tr>
<td>Attribute Query Service (SAML 2.0)</td>
<td><code>/idp/attrsvc.ssaml2</code>&lt;br&gt;The SAML implementation that receives and processes attribute requests.</td>
</tr>
<tr>
<td>Metadata Service</td>
<td><code>/idp/isx.saml1</code>&lt;br&gt;The SAML 1.x implementation of IdP intersite transfer service (ISX) to which clients are redirected for SSO requests.</td>
</tr>
<tr>
<td>Artifact Resolution Service (SAML 1.x)</td>
<td><code>/idp/soap.ssaml1</code>&lt;br&gt;The SOAP endpoint that processes artifacts returned from a federation partner to retrieve the referenced XML message on the back channel.</td>
</tr>
<tr>
<td>Single Sign-on Service (WS-Federation)</td>
<td><code>/idp/prp.wsf</code>&lt;br&gt;The WS-Federation implementation URL that receives and processes security-token requests and SLO messages.</td>
</tr>
</tbody>
</table>
Managing SP Connections

As an IdP, you manage connection settings to support the exchange of federation protocol messages (SAML or WS-Federation) with an SP. These settings include:

- User attributes you expect to send in an SSO assertion (if any).
- User attributes that may be sent using the Attribute Query profile (if that profile is used).
- The protocol and, for SAML, the profile you will use, including detailed security specifications (the use of digital signatures, signature verification, XML encryption, and SSL). For more information see the “Supported Standards” chapter in Getting Started.

To continue with the configuration, you and your federation partner must have decided this information in advance (see “Federation Planning Checklist” on page 16). Your federation partner must supply some connection settings and other information (see “Configuration Data Exchange” on page 18).

Tip: If you are configuring connections to more than one partner under SAML 2.0 specifications, or if you intend to add partners in the future, consider using Auto-Connect (see “Configuring SP Auto-Connect” on page 189).

If your agreement includes sending assertions containing attribute values from a local data store, then you will need to define the data store during this configuration if you have not done so already (see “Managing Data Stores” on page 70).

Accessing Connections

You can create or modify connections directly via the Main Menu. Note that the menu displays the four most-recently modified connections. To view a list of all SP connections, click the Manage All SP link.

Using the Main Menu

From the Main Menu under My IdP Configuration, you can configure a new connection, modify an existing connection, or view connections.

Tip: To copy or delete connections or to recover connection drafts, click Manage All SP (see “Using the Manage Connections Screen” on page 114).
Note that long connection names are truncated for this display. The full connection names are displayed on the Manage Connections screen (see “Using the Manage Connections Screen” on page 114).

**To begin configuring a new connection:**

- Click **Create New** under SP Connections on the Main Menu.
  

**Tip:** If you want to use a virtual ID for a second a connection to the same partner, the fastest way is to click **Manage All SP** and copy the first connection (see “Using the Manage Connections Screen” on page 114). For information about virtual IDs, see “Federation Server Identification” on page 16.

**To modify a connection:**

1. Click the connection name under SP Connections on the Main Menu.
   
   Only the four most recently edited connections are displayed. To see all connections, including drafts, click **Manage All SP**.

2. On the Activation & Summary screen, click the heading for the information you want to change.
3. Make your change and click **Save**.

   **Note:** If **Save** is not available, it means your modification requires other changes or you are editing a screen that is part of a series of subtasks. Click **Next** and continue making indicated changes. The **Done** button indicates that further changes in the task are optional. When you have no further changes, click **Done** and then click **Save** on the task summary screen.

---

**Using the Manage Connections Screen**

From the Manage Connections screen, you can configure a new connection, modify or copy an existing connection or draft, or delete a connection (if it is not active). An export function is also provided, which allows you save individual connections.

   **Note:** The connection export function results in an XML file that you can modify and import into another PingFederate server at your site (see “Connection Management Service” on page 299).

From this screen, you can also globally override transaction logging levels set for individual connections or restore connection-based logging (see “Runtime Transaction Logging” on page 29).

---

**To access the Manage Connections screen:**

- Click **Manage All SP** under **SP Connections** on the Main Menu.
To begin configuring a new SP connection:

- Click Create Connection on the Manage Connections screen.
  
  See “Managing SP Connections” on page 112 for step-by-step information.

**Tip:** If you need to create a second connection to a partner using a Virtual ID, copy the existing connection and make necessary changes, including adding the Virtual ID on the General Info screen. For information about Virtual IDs, see “Federation Server Identification” on page 16.

To copy a connection:

1. Click Copy under Action for the connection you want to copy.
2. Enter new General Information for the connection (see “General Information” on page 119).
3. Make any further changes needed for the new connection.

**Note:** SaaS-Provisioning configurations are not copied for a connection (see “SaaS Provisioning” on page 22).

To edit a connection or continue working on a draft:

- Click the Connection Name link.
  
  For a draft, you will return to where you left off.

To export a connection:

1. Click Export under Action for the connection.
2. Save the XML file on your file system.

  You can change the name of the file, but keep the XML extension.

**Tip:** You can import the connection programmatically or manually into another instance of PingFederate (see “Connection Management Service” on page 299).

To delete a connection:

1. Under Action, click Delete for the connection.
   
   (To undo the deletion, click Undelete.)

   **Note:** The Delete function is not available if the connection is active.

2. To confirm the deletion, click Save.

To sort the list of connections:

- Click the arrow next to any column heading to sort the list based on that column.
To filter the list by Protocol and/or Status:
▶ Select a filter criterion from either or both of the drop-down lists.

To override connection-based transaction logging:
1. Select On under Logging Mode Override.
2. Choose the logging mode you want to use for all connections.

To restore connection-based transaction logging:
▶ Select Off under Logging Mode Override.

Configuration Steps

Many steps involved in setting up a federation connection are protocol-independent; that is, they are required steps for all connections, regardless of the associated standards (see the “Supported Standards” chapter in Getting Started). Also, for any given connection, some configuration steps are required under the applicable protocol, while others are optional. The PingFederate administrative console determines the required steps and dynamically presents optional steps based on your selections.

The remainder of this section provides sequential information about every step you might encounter, regardless of the protocol you are using for a particular connection.

Note: The configuration screens represented in this chapter show “SAML 2.0” in their left corners, unless they are exclusive to WS-Federation or SAML 1.x setup requirements. When the SAML 2.0 screens are also applicable to SAML 1.x and/or WS-Federation connections, the SAML 2.0 representations and discussion also apply to the other protocols, unless otherwise indicated.

Use the lists and links (or page references) below to find specific information about steps that may apply to your connection requirements:

SAML 2.0 Configuration Steps

- “Choosing a Connection Type” on page 117
- “Importing Metadata” on page 118
- “General Information” on page 119
- “Setting an Assertion Lifetime” on page 121
- “Choosing Profiles (SAML 2.0)” on page 122
- “Assertion Creation” on page 123
- “Configuring Web SSO” on page 147
• “Configuring the Attribute Query Profile” on page 159

**Note:** You can configure the Attribute Query profile as a stand-alone connection or in conjunction with a SAML 2.0 Web SSO connection.

• “Configuring Credentials” on page 164
• “Connection Activation and Summary” on page 184

**WS-Federation Configuration Steps**
• “Choosing a Connection Type” on page 117
• “General Information” on page 119
• “Setting an Assertion Lifetime” on page 121
• “Assertion Creation” on page 123
• “Configuring Web SSO” on page 147
• “Configuring Credentials” on page 164
• “Connection Activation and Summary” on page 184

**SAML 1.x Configuration Steps**
• “Choosing a Connection Type” on page 117
• “Importing Metadata” on page 118
• “General Information” on page 119
• “Setting an Assertion Lifetime” on page 121
• “Assertion Creation” on page 123
• “Configuring Web SSO” on page 147
• “Configuring Credentials” on page 164
• “Connection Activation and Summary” on page 184

For more information, see “Navigating the Administrative Console” in the “Console Navigation” chapter of *Getting Started*.

**Tip:** You must completely configure a connection before you can save it on the Activation & Summary screen. Until then, the configuration is temporary and can be lost; the console times out after several minutes of inactivity. Before reaching Activation & Summary, however, you can click **Save Draft**, which is available on most screens after you enter General Information (see “Console Buttons” in the “Console Navigation” chapter of *Getting Started*).

### Choosing a Connection Type

If your federation deployment supports multiple protocols, then select the applicable protocol on the Connection Type screen.
Tip: If your partner’s deployment also supports multiple protocols and you intend to communicate using more than one, then you must set up a separate connection for each protocol.

Tip: When you select a SaaS vendor as a Connection Type, many settings throughout the connection setup are configured for you automatically using quick-connection templates. For more information about this screen and subsequent steps, refer to the Quick Connection Guide available with your PingFederate SaaS Connectors.

If your installation does not support multiple protocols or include any SaaS Connectors, this screen is informational; click Next.

Importing Metadata

If you are using one of the SAML protocols and have received a metadata file from your partner, click Browse on the Import Metadata screen, select the file, and click Next. For more information, see “Metadata” in the “Supported Standards” chapter of Getting Started.

Note: If the endpoints in the metadata file share the same base URL (protocol, hostname, and port), PingFederate uses this information to populate the Base URL field (see “General Information” on page 119). Consequently, individual endpoints on other screens do not include this information—only relative paths are shown.

If you are not using a metadata file, click Next on the Import Metadata screen.
Importing a Verification Certificate

The Import Certificate screen appears only if the metadata file you have chosen to import is signed and the certificate needed to verify the signature is not contained in the file.

- Click Browse to locate and open the XML signature verification certificate for this partner.

Viewing the Metadata Summary

The Metadata Summary screen provides security information about an imported metadata file, including whether the file was signed and, if so, the trust status of the certificate used to verify the signature.

General Information

On the General Info screen, you provide a required unique identifier and display name for a connection, as well as optional contact information. In addition, on this screen you can set the level of transaction logging for this connection partner (see “Runtime Transaction Logging” on page 29).
# Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner’s Entity ID/Audience/Partner’s Realm (Connection ID)</td>
<td>(Required) The published, protocol-dependent, unique identifier of your partner. For a SAML 2.0 connection, this is your partner’s SAML Entity ID. For a SAML 1.x connection, this is the Audience your partner advertises. For a WS-Federation connection, this is your partner’s Realm. This ID may have been obtained out-of-band or via a metadata file if you are using a SAML protocol (see “Exporting Metadata” on page 30).</td>
</tr>
<tr>
<td>Connection Name</td>
<td>(Required) A plain-language identifier for the connection—for example, a company or department name. This name is displayed in the connection list on the Main Menu.</td>
</tr>
<tr>
<td>Virtual Server ID</td>
<td>Enter a unique server ID in this field if you want to identify your server to this connection partner using an ID other than the one you specified under Server Settings (see “Specifying Federation Information” on page 65). For information about Virtual Server IDs, see “Federation Server Identification” on page 16.</td>
</tr>
<tr>
<td>Base URL</td>
<td>The fully qualified hostname and port on which your partner’s federation deployment runs (e.g., <a href="https://www.pingidentity.com:9031">https://www.pingidentity.com:9031</a>). This entry is an optional convenience, allowing you to enter relative paths to specific endpoints, instead of full URLs, during the configuration process.</td>
</tr>
<tr>
<td>Company</td>
<td>The name of the partner company to which you are connecting.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The contact person at the partner company.</td>
</tr>
<tr>
<td>Contact Number</td>
<td>The phone number of the contact person at the partner company.</td>
</tr>
<tr>
<td>Contact Email</td>
<td>The email address for the contact person at the partner company.</td>
</tr>
<tr>
<td>Logging Mode</td>
<td>The level of transaction logging applicable for this connection (see “Runtime Transaction Logging” on page 29). Note that you can override connection logging mode settings globally from the connections list (see “Using the Manage Connections Screen” on page 114).</td>
</tr>
</tbody>
</table>
To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click General Info in the steps list.

For a new connection:
► Fill in the information needed and click Next.

   Connection ID and Connection Name are required (see “Field Descriptions” above).

   Note that the Virtual ID identifies your own federation deployment for this connection only and overrides the ID you specified under Server Settings (see “Federation Server Identification” on page 16).

For an existing connection:
► If you are editing existing information, modify the fields as needed and click Save.

Setting an Assertion Lifetime

Identity-federation standards require a window of time during which an assertion is considered valid. Each assertion has a time-stamp XML element as well as elements indicating the allowable lifetime of the assertion (in minutes) before and after the time stamp.

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes before</td>
<td>The amount of time before the assertion was issued during which it is to be considered valid.</td>
</tr>
<tr>
<td>Minutes after</td>
<td>The amount of time after the assertion was issued during which it is to be considered valid.</td>
</tr>
</tbody>
</table>
Chapter 5
Identity Provider Configuration

To change the default times:
► (Optional) Edit the desired setting(s) and click Next or Save.

Choosing Profiles (SAML 2.0)

A SAML profile is the message-interchange scenario that you and your federation partner have agreed to use (see “Federation Planning Checklist” on page 16). For SAML 2.0, PingFederate supports all IdP- and SP-initiated Web SSO and SLO profiles as well the Attribute Query profile (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

For information on typical SSO/SLO profile configurations, including illustrations, see the “Profiles” sections in the “Supported Standards” chapter in Getting Started.

When a connection is for a SaaS provider supported for provisioning, you can enable or disable the feature for the connection (see “SaaS Provisioning” on page 22).

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Profiles in the steps list.

Note: This step is not presented for SAML 1.x connections because IdP SSO is assumed, the SLO and Attribute Query profiles are not supported, and the server supports SP-initiated SSO automatically (see “SAML 1.x Profiles” in the “Supported Standards” chapter of Getting Started).

The step is also not presented for WS-Federation connections because profile selection is not required (see “WS-Federation” in the “Supported Standards” chapter of Getting Started).
To configure profiles:

1. Select the profile(s) applicable to this connection and click **Next**.
   
   You must select an SSO profile before you can enable SLO or SaaS Provisioning (when available).

2. Complete the associated configuration tasks.
   
   Refer to the table below for sections of this manual covering configuration details:

<table>
<thead>
<tr>
<th>For information about:</th>
<th>See this section:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSO/SLO configuration</td>
<td>“Configuring Web SSO” on page 147</td>
</tr>
<tr>
<td>Attribute Query configuration</td>
<td>“Configuring the Attribute Query Profile” on page 159</td>
</tr>
<tr>
<td>SaaS Provisioning</td>
<td>“Configuring SaaS Provisioning” on page 172</td>
</tr>
<tr>
<td>Back-channel authentication, digital signing, and other security settings</td>
<td>“Configuring Credentials” on page 164</td>
</tr>
</tbody>
</table>

**Assertion Creation**

As an IdP, you must specify how PingFederate will obtain user-authentication information and use it to create assertions appropriate for your SP partner, including additional user attributes as needed. This configuration includes:

- Choosing an identity-mapping method (see “Choosing an Identity Mapping Method” next).
- Defining the attribute contract you will use with this partner, if any (see “Creating an Attribute Contract” on page 126).
- Configuring instances of one or more adapters (see “IdP Adapter Mapping” on page 128) and specifying how they are used to fulfill the attribute contract.
Click **Configure Assertion Creation** to continue.

**Choosing an Identity Mapping Method**

PingFederate allows your SP partner to use either **account linking** or **account mapping** to associate remote users with local accounts for SSO between business partners (see “Identity Mapping” on page 5). At the Identity Mapping step, you choose the type of name identifier your partner needs to facilitate one of these options. You and your partner may want to decide in advance which option to use (see “Federation Planning Checklist” on page 16).

The choices of name-identifier types depend on which protocol you are using:

- For information about SAML 2.0 selections, see “SAML Name ID Selections” next.
- For information about WS-Federation selections, see “WS-Federation Name ID Selections” on page 126.

**SAML Name ID Selections**

The allowable types of name identifiers for SAML connections are described below. These choices affect how SPs make use of **account mapping** or **account linking**.
If your SP is using account linking, then establishing an attribute contract is not required. Depending on your partner agreement, however, you may choose to supplement the account link with an attribute contract. In this configuration the account link is used to determine the user's identity, while the additional attributes might be used for authorization decisions, customized Web pages, and so on, at the SP site (see “About Attributes” on page 8).

**Important:** If you have previously set up a configuration to use an attribute contract and want to change the configuration to use account linking without additional attributes, then the existing attribute contract will be discarded.

Account linking can be used with either a clear, standard name identifier or an opaque pseudonym.

- If you want to send a known attribute to identify a user—for example, a username or email address—then select **Standard**.
- If you and your partner have agreed to use an opaque persistent name identifier (often used for account linking), then select **Pseudonym** on the Identity Mapping screen.

The pseudonym is based on values pulled from the IdP adapter instance used to authenticate the user. You select these values when you configure IdP adapter instances (see “Setting Pseudonym Values and Masking” on page 108).

To set up an attribute contract to use in conjunction with an opaque identifier, click the checkbox next to “Include attributes . . .” after selecting **Pseudonym**.
Select **Transient** to enhance the privacy of a user’s identity. Unlike a pseudonym, a transient identifier is different each time a user initiates SSO (see “Account Linking” on page 6).

A typical application for this selection might be, for example, when an SP provides generalized group accounts based on organizational rather than individual identity.

To set up an attribute contract to use in conjunction with an opaque identifier, click the checkbox next to “Include attributes . . .” after selecting **Transient**.

**To reach this screen:**

1. Click a connection name on the **Main Menu**.
   
   Click **Manage All SP**, if needed, to see a full list of connections.

2. Click **Assertion Creation** in the steps list.

3. Click **Identity Mapping** in the steps list.

**WS-Federation Name ID Selections**

A name identifier is a uniquely identifying user attribute.

- **Email Address**: This attribute is commonly used as a unique identifier for SSO and SLO. Make this selection, for example, if a user logs in using an email address or if the information is available for lookup in a local data store.

- **User Principal Name**: The username or other unique ID of the subject initiating the transaction. Make this selection, for example, if a username will be available from the current user session as part of a cookie or can be derived from a local data store.

- **Common Name**: This selection provides for anonymous SSO to your SP, generally using a hard-coded generalized logon. Make this selection if your partner agreement involves a many-to-one use case—for example, if the SP has a group account set up for all users in a particular domain.

Later, you will map your choice to the **SAML_SUBJECT** attribute in the SAML assertion (see “Mapping Default Attribute Contract Fulfillment” on page 145).

**Creating an Attribute Contract**

An attribute contract is the set of user attributes that you and your partner have agreed will be sent in a SAML assertion for this connection (see “Attribute Contracts” on page 9). You identify these attributes on this screen.

If you are sending a “standard” name identifier (see “Choosing an Identity Mapping Method” on page 124), then the contract includes the default **SAML_SUBJECT**, which identifies the user in the assertion. You will configure this variable later to contain a user ID or another agreed-upon attribute—for
instance, an email address—that uniquely identifies the user (see “Attribute Contract Fulfillment” on page 141).

**Note:** Creating an attribute contract is optional if you are sending either a pseudonym or a transient identifier to your connection partner (see “Choosing an Identity Mapping Method” on page 124).

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click **Manage All SP**, if needed, to see a full list of connections.
2. Click **Assertion Creation** in the steps list.
3. Click **Attribute Contract** in the steps list.
   - If this step is not in the list, then you have chosen to send either a pseudonym or a transient identifier without additional attributes (see “Choosing an Identity Mapping Method” on page 124).

To add an attribute:

1. Enter the attribute name in the text box and click **Add**.
   - Attribute names are case-sensitive and must correspond to the names configured by your federation partner.

To modify an attribute name:

1. Click **Edit** under **Action** for the Attribute name.
2. Edit the name and click **Update**.
To delete an attribute:

- Click **Delete** for the Attribute Name.

**IdP Adapter Mapping**

IdP adapters are responsible for handling user authentication as part of an SSO operation (see “Integration Kits and Adapters” on page 7). Map one or more IdP adapter instances into each SP connection so that when a user authenticates with a particular external identity management system the user attributes are returned to PingFederate.

Regardless of how many IdP adapter instances are mapped in an SP connection, PingFederate uses only one instance to authenticate a user. Because each instance may return different user attributes, each IdP adapter mapping must define how the attribute contract is fulfilled; you must map attributes from each adapter—and/or attributes retrieved from your local data stores—into the assertions you will send to this SP to fulfill the attribute contract.

You begin this configuration on the IdP Adapter Mapping screen, where you choose to map one or more instances of IdP adapters. If you have not yet configured an instance of the IdP adapter you intend to use within this SP connection, see “Configuring IdP Adapters” on page 104.

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click **Manage All SP**, if needed, to see a full list of connections.
2. Click **Assertion Creation** in the steps list.
3. Click **IdP Adapter Mapping** in the steps list.
To modify an existing Adapter Instance:
1. Click its Name link.

To begin configuring an Adapter Instance for this connection:
- Click Map New Adapter Instance (see the next section).

Selecting an Adapter Instance

A configured and deployed adapter in PingFederate is known as an adapter instance. The same adapter instance may be mapped by multiple connections (see “Configuring IdP Adapters” on page 104).

You can use attributes returned from the adapter (the adapter contract) to fulfill the attribute contract with this partner, and/or use them to look up additional attributes in a user data store. You make this choice on the next screen (see “Selecting Assertion Mapping” on page 130).

To reach this screen:
1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click **IdP Adapter Mapping** in the steps list.

   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).

4. Click an Adapter Instance Name or **Map New Adapter Instance**.

**Selecting Assertion Mapping**

For SAML assertions, you can query local user data stores to help fulfill the attribute contract, in conjunction with attribute values supplied by the IdP adapter you are using with PingFederate (see “Integration Kits and Adapters” on page 7).

The values supplied by the adapter you have chosen are shown under Adapter Contract on the Assertion Mapping screen.

To reach this screen:

1. Click a connection name on the Main Menu.

   Click **Manage All SP**, if needed, to see a full list of connections.

2. Click **Assertion Creation** in the steps list.

3. Click **IdP Adapter Mapping** in the steps list.

   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).

4. Click an Adapter Instance Name or **Map New Adapter Instance**.

5. Click **Assertion Mapping** in the steps list.
Managing SP Connections

If you choose to “retrieve additional attributes”, then you will identify data stores and specify lookup queries next (see “Configuring Attribute Sources and User Lookup” on page 131).

If you use “only the Adapter Contract values”, then you will map values for the attribute contract next (see “Mapping Default Attribute Contract Fulfillment” on page 145).

Tip: To determine whether you need to look up additional values, compare your attribute contract against your adapter contract (see “Creating an Attribute Contract” on page 126 and “IdP Adapter Mapping” on page 128). If the attribute contract requires more information, determine whether your local data stores can supply it. (You can also choose to use text constants or expressions for certain information—see “Mapping Default Attribute Contract Fulfillment” on page 145.)

Configuring Attribute Sources and User Lookup

Attribute sources are specific database or directory locations containing information that may be needed for the attribute contract (see “Creating an Attribute Contract” on page 126). Attribute sources can be reused across connections to other SP partners.

This portion of the connection configuration allows you to set up search parameters for your data stores, including “fall-through” searches. For example, you can add the same data store more than once, using different search queries for each instance, or you can search different data stores successively, either with the same queries (for failover) or different ones.

If any search fails to find a user in the specified Attribute Source, the next search is executed until a match is found.

Note: Queries are executed in the order of Attribute Sources shown. Use the move up/move down controls as needed to adjust the order. Note, however, that data can originate from only one source.
To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click IdP Adapter Mapping in the steps list.
   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).
4. Click an Adapter Instance Name or Map New Adapter Instance.
5. Click Attribute Sources & User Lookup in the steps list.
   If this step is not listed, then this connection is configured to use adapter values only (see “Selecting Assertion Mapping” on page 130).

To configure an attribute source:
- Click Add Attribute Source and complete the setup steps (see “Attribute Source Setup” next).

To modify an attribute source configuration:
1. Click the attribute source Description link.
2. Click Save on the screen you change.

Note: Depending on what you change, you may need to modify dependent data in subsequent steps, as indicated. Click Save or Done when either of those options appears.

Attribute Source Setup
For attribute-source setup information, refer to the sections indicated in the following steps.

Note: As you make selections on configuration screens, ensure that you allow enough time for PingFederate to access your data store and populate drop-down lists.

1. See “Selecting a Data Store” (next section).
2. See the following sections in this manual, depending on the type of data store:

<table>
<thead>
<tr>
<th>Data Store Type</th>
<th>Related Manual Sections</th>
</tr>
</thead>
</table>
| JDBC            | • “Selecting a JDBC Database Table and Columns” on page 134  
|                 | • “Configuring a Database Filter (WHERE Clause)” on page 136 |
Managing SP Connections

3. See “Attribute Contract Fulfillment” on page 141.

Selecting a Data Store

This screen allows you to choose a data store from a previously configured list (see “Managing Data Stores” on page 70). Attribute values extracted from this data store will be used to help fulfill the attribute contract for this partner (see “Creating an Attribute Contract” on page 126).

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Source Description</td>
<td>A name that uniquely identifies the specific user lookup query. Since attribute sources can be reused within the same connection, the description helps distinguish between lookups to the same data store.</td>
</tr>
<tr>
<td>Active Data Store</td>
<td>The location of the source to be used for looking up attributes. Examples: jdbc:mysql://10.10.10.80:3306 users.mycompany.com:5200</td>
</tr>
<tr>
<td>Data Store Type</td>
<td>Indicates whether the data store is JDBC, LDAP, or Custom.</td>
</tr>
</tbody>
</table>
Chapter 5
Identity Provider Configuration

To reach this screen:
1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click IdP Adapter Mapping in the steps list.
   - If this step is not available, you have chosen to pass either a pseudonym or transcendent name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).
4. Click an Adapter Instance Name or Map New Adapter Instance.
5. Click Attribute Sources & User Lookup in the steps list.
   - If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 130).
6. Click the attribute source Description link.

To choose a Data Store:
- Choose an Active Data Store and click Next.
  - A data store configuration must be defined under System Settings for use within a connection. If the data store you want is not shown in the drop-down menu, click Manage Data Stores to add a new data store (see “Managing Data Stores” on page 70).

Selecting a JDBC Database Table and Columns

When you choose to use a database source for attributes, you follow this path through the configuration steps.

On this screen you begin to specify exactly where additional data can be found to complete the attribute contract when you send an assertion to this SP (see “Creating an Attribute Contract” on page 126). Only one table may be used as a source of data for a JDBC lookup.
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schema</td>
<td>Lists the table structure that stores information within a database. Some databases such as Oracle require selection of a specific schema for a JDBC query. Other databases, such as MySQL, do not require selection of a schema.</td>
</tr>
<tr>
<td>Table</td>
<td>The name of the table contained in the database. Use the drop-down to change the table.</td>
</tr>
<tr>
<td>Columns to return from SELECT</td>
<td>Displays selected table columns. Select the columns that are associated with the desired attributes you would like to return from the JDBC query.</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click IdP Adapter Mapping in the steps list.
   - If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).
4. Click an Adapter Instance Name or Map New Adapter Instance.
5. Click Attribute Sources & User Lookup in the steps list.
   - If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 130).
6. Click the attribute source Description link.
7. Click Database Table and Columns from the steps list.

To select a database table and columns for queries:

1. Choose a Schema file (when applicable) from the drop-down list.
2. Choose a Table from the drop-down list.
3. Choose a name under Columns to Return from Select and click Add Column.
   - Repeat this step for other columns as needed.

**Note:** You do not need to add a column here for it to be used as part of a search key (see “Configuring a Database Filter (WHERE Clause)” next). Add only attributes from which you need actual values to pass in an assertion.
Configuring a Database Filter (WHERE Clause)

The JDBC WHERE clause in PingFederate queries the data table you selected to retrieve a record associated with a particular value (or values) from the assertion. The clause is in the form:

```
WHERE column1=value1 [AND column2=value2] [OR ...]
```

The left side of the first variable pair uses a column name in the database table you selected (see “Selecting a JDBC Database Table and Columns” on page 134).

The right side generally uses values passed in from your session lookup adapter (variables, including the correct formatting, are listed under Adapter Values—see “Configuring IdP Adapters” on page 104).

You can also apply additional search criteria from your own database, using any other columns from the targeted table.

**Tip:** Click “View List of ALL columns . . .” to see a list from which to copy and paste.

For general information about WHERE clauses, consult your DBMS documentation.

**EXAMPLE:**

```
userid='${username}'
```

In this example `userid` is the name of a column in the JDBC data store. On the right side, `username` returns the value of the `username` variable from the IdP adapter.

**Important:** You must use the $() syntax to retrieve the value of the enclosed variable and use single quotation marks around the $() characters.
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where</td>
<td>WHERE clause statements conditionally select data from a table. Enter the WHERE clause statement in the space provided. For example: WHERE email='<a href="mailto:clive@company.com">clive@company.com</a>'.</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click Attribute Sources & User Lookup in the steps list.
   If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 130).
4. Click the attribute source Description link.
5. Click Database Filter from the steps list.

To construct the WHERE clause:

1. Enter the statement in the space provided, following the guidelines and example above.
   The initial WHERE is optional.
2. Ensure the syntax and variable names are correct.
   When you click Next, you will map attribute values returned from the database into the assertion (see “Attribute Contract Fulfillment” on page 141).
Configuring an LDAP Directory Search

When you choose to use an LDAP source for attributes, you follow this path through the configuration steps.

On this screen you specify the branch of your LDAP hierarchy where you want PingFederate to look up user data.

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base DN</td>
<td>The base distinguished name of the tree structure in which the search begins. This field is optional if records are located at the LDAP root.</td>
</tr>
<tr>
<td>Search Scope</td>
<td>Determines the node depth of the query. Select Subtree, One level or Object.</td>
</tr>
<tr>
<td>Root Object Class</td>
<td>The class containing the attributes you want.</td>
</tr>
<tr>
<td>Attributes to return from search</td>
<td>A list of added from the drop-down list below. Subject DN is a default attribute, which may be used as the primary user identifier.</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click **Manage All SP**, if needed, to see a full list of connections.
2. Click **Assertion Creation** in the steps list.
3. Click **IdP Adapter Mapping** in the steps list.

   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).

4. Click an Adapter Instance Name or **Map New Adapter Instance**.

5. Click **Attribute Sources & User Lookup** in the steps list.

   If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 130).

6. Click the attribute source Description link.

7. Click **LDAP Directory Search** from the steps list or fill out the appropriate screens and advance to this screen.

   If you have not yet defined an LDAP data store, see “Selecting a Data Store” on page 133.

**To select LDAP attributes:**

1. (Optional) Enter a Base DN.
2. Select a Search Scope.
3. Select a Root Object Class.
4. Under Attributes to return from search, choose an attribute and click **Add Attribute**.

   Note that the attribute Subject DN is always returned by default.
5. Repeat the last step for other attributes as needed.
6. (Optional) Change the Search Scope or the Root Object Class if you want attributes from other locations.

**Note:** You do not need to add an attribute here for it to be used in a search filter (see “Configuring an LDAP Filter”). Add only attributes from which you need actual values to pass in an assertion.

**Configuring an LDAP Filter**

The LDAP filter queries the data you selected to retrieve a record associated with a particular value (or values) from the user's session. The filter is in the form:

\[
(\text{attribute}=${\text{value}})
\]

The left-side variable is an attribute you selected earlier (see “Configuring an LDAP Directory Search” on page 138).

The right side generally uses values passed in from your session lookup adapter (variables, including the correct syntax, are listed under Adapter Values—see “Configuring IdP Adapters” on page 104).
You can also apply additional search criteria from your data store, using any other attributes from the targeted object classes.

**Tip:** Click “View List of Available LDAP Attributes” for a list from which you can copy and paste.

For general information about search filters, consult your LDAP documentation.

### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>Narrows a search to locate requested data by either including or excluding specific records. An LDAP filter includes the attributes in the search and the value or range of values that the search is attempting to match. Searches are conducted by using three components: 1) at least one attribute (attribute data type) to search on, 2) a search filter operator that will determine what to match, and 3) the value of the attribute being sought. Searches must have at least one of each of these three components.</td>
</tr>
</tbody>
</table>

**To reach this screen:**

1. Click a connection name on the Main Menu. Click **Manage All SP**, if needed, to see a full list of connections.
2. Click **Assertion Creation** in the steps list.
3. Click **IdP Adapter Mapping** in the steps list.
   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).

4. Click an Adapter Instance Name or **Map New Adapter Instance**.

5. Click **Attribute Sources & User Lookup** in the steps list.
   If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 130).

6. Click the attribute source Description link.

7. Click **LDAP Filter** from the steps list.
   If you have not yet defined an LDAP data store, see “Selecting a Data Store” on page 133.

**To construct the LDAP filter:**

1. Enter the statement in the space provided, following the guidelines and example above.

   ![Note:](image)
   If you used an anonymous binding to create this LDAP connection, your access might be restricted (see “Configuring an LDAP Connection” on page 76).

2. Ensure the syntax and variable names are correct.

3. Click **Next**.

**Configuring Custom Source Filters**

When you choose to use a custom source for attributes, you follow this path through the configuration steps.

On this screen you specify a filter, or lookup query, for your custom data source. This screen display and the syntax of the filter depends on your developer's implementation of the custom source SDK.

**Selecting Custom Source Fields**

On the Configure Custom Source Fields screen, you can choose from among the fields shown to map to the adapter contract. These choices are supplied by the driver implementation. Select only those needed to fulfill the attribute contract for this partner connection.

**Attribute Contract Fulfillment**

The last step in configuring an attribute source is to map values into the attribute contract (see “Creating an Attribute Contract” on page 126). These are the values that will be included in assertions sent to this SP (provided the information is found in this attribute source).

You map attributes on the Attribute Contract Fulfillment screen.
Map each Target attribute to fulfill the Attribute Contract from one of these Sources:

- **Adapter**
  Values are returned from the session. When you make this selection, the associated Value drop-down list is populated by the session lookup adapter you are using (see “Integration Kits and Adapters” on page 7).
  
  For example, you might choose the adapter attribute `username` to map to `SAML_SUBJEC`.

- **LDAP/JDBC/Custom**
  Values are returned from your attribute source. When you make this selection, the Value list is populated by the LDAP, JDBC or Custom attributes you identified for this Attribute Source (see “Configuring an LDAP Directory Search” on page 138, “Selecting a JDBC Database Table and Columns” on page 134, or “Configuring Custom Source Filters” on page 141).

- **Text**
  The value is what you enter. This can be text only, or you can mix text with references to any of the values from the adapter, using the `${attribute}` syntax.
  
  You can also enter values from your data store, when applicable, using this syntax:
  ```
  ${ds.attribute}
  ```
  where `attribute` is any of the data store attributes you have selected.
There are a variety of reasons why you might hard code a text value. For example, if your SP's Web application provides a service based on your company's name, you might provide that attribute value as a constant.

Tip: Two other variables are also available: \${SAML$_\text{SUBJECT}}\) and \${TargetResource}\). \$SAML$_\text{SUBJECT}\) is the initiating user (or other entity); \$TargetResource\) is a reference to the protected application or other resource for which the user is requesting SSO access (available only if specified in the relevant \texttt{startSSO.ping} query parameter—see “Application Endpoints” on page 289).

Tip: Another selection in the Source drop-down menu, Expressions, may be enabled (see “Using Attribute Mapping Expressions” on page 309). This option provides more complex mapping capabilities—for example, transforming incoming values into different formats. All of the variables available for text entries are also available for expressions.

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click IdP Adapter Mapping in the steps list.
   - If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).
4. Click an Adapter Instance Name or Map New Adapter Instance.
5. Click Attribute Sources & User Lookup in the steps list.
   - If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 130).
6. Click the attribute source Description link.
7. Click Attribute Contract Fulfillment from the steps list.
   - If you have not yet defined a data store, see “Selecting a Data Store” on page 133).

To map attributes:

1. Choose a Source for each Target attribute.
2. Choose (or enter) a Value for each Attribute.
   - See “Map each Target attribute to fulfill the Attribute Contract from one of these Sources;” on page 142. All values must be mapped.
3. Click Next.
Using the Attribute Source Summary Screen

When you have finished configuring Attribute Sources and User Lookup, you can review the configuration on the Summary screen.

If you need to make any changes, click the heading over the information you want to edit. When you are finished, click **Done** to continue with IdP Adapter Mapping configuration. If you are editing an existing connection, click **Done** on successive screens until you reach the Assertion Creation screen and then click **Save**.

Specifying a Failsafe Attribute Source

If attributes needed to fulfill an attribute contract cannot be found in your data stores, you can either map a default set of attribute values to send—identifying a “guest” user, for example—or you can have PingFederate stop the SSO transaction. This choice depends on your agreement with the SP.

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click **Manage All SP**, if needed, to see a full list of connections.

2. Click **Assertion Creation** in the steps list.

3. Click **IdP Adapter Mapping** in the steps list.
   
   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).

4. Click an Adapter Instance Name or **Map New Adapter Instance**.

5. Click **Failsafe Attribute Source** in the steps list.
   
   This step appears only if you are using data stores (see “Selecting Assertion Mapping” on page 130).

To specify whether to use a failsafe attribute source:

- Make the relevant selection to use either a default set of attributes or to terminate the SSO, and then click **Next**.
Mapping Default Attribute Contract Fulfillment

Fulfillment of the attribute contract must be specified whether or not data sources are used. You accomplish this on the Attribute Contract Fulfillment screen, either by choosing to configure default mappings after setting up attribute sources (see “Specifying a Failsafe Attribute Source” on page 144) or if you choose not to set up attribute sources (see “Selecting Assertion Mapping” on page 130).

Map each Target attribute to fulfill the Attribute Contract from one of these Sources:

- **Adapter**
  
  Values are returned from the session. When you make this selection, the associated Value drop-down list is populated by the session lookup adapter you are using (see “Integration Kits and Adapters” on page 7).
  
  For example, you might choose the adapter attribute `username` to map to `SAML_SUBJECT`.

- **Text**
  
  The value is what you enter. This can be text only, or you can mix text with references to any of the values from the adapter, using the `$\{attribute\}` syntax.
  
  There are a variety of reasons that you might hard code a text value. For example, if your SP’s Web application provides a consumer service, you might want to supply a particular promotion code.

**Tip:** Another selection in the Source drop-down menu, Expressions, may be enabled (see “Using Attribute Mapping Expressions” on page 309). This option provides more complex mapping capabilities—for example, transforming incoming values into different formats. All of the variables available for text entries are also available for expressions.
Chapter 5
Identity Provider Configuration

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Assertion Creation in the steps list.
3. Click IdP Adapter Mapping in the steps list.
   If this step is not available, you have chosen to pass either a pseudonym or transient name identifier and not to use additional attributes (see “Choosing an Identity Mapping Method” on page 124).
4. Click an Adapter Instance Name or Map New Adapter Instance.
5. Click Attribute Contract Fulfillment in the steps list.
   If you are using data stores for attribute mapping and this step does not appear, see “Specifying a Failsafe Attribute Source” on page 144.

To map attributes:
1. Choose a Source for each Target attribute (see descriptions of each Source type above).
2. Choose (or enter) a Value for each Attribute.
   All values must be mapped.
3. Click Next.
Configuring Web SSO

The Web SSO screen displays the SSO profile choices you made previously (if you are using SAML 2.0—see “Choosing Profiles (SAML 2.0)” on page 122).

For profile configuration you need to know:

- For SSO profiles, the URL(s) of your SP’s Assertion Consumer Service(s)
- For SLO profiles, the URL(s) of your SP’s Single Logout Service(s)
- When artifact is an allowable inbound binding, the URL of your SP’s Artifact Resolution Service(s)
- The transport configurations (bindings) that you will use to send and receive data for Web SSO/SLO connections
- Digital signature policies and certification requirements to which you and your connection partner have agreed
- XML encryption policies to which you and your connection partner have agreed

The following sections provide more information on requirements for each SAML profile.

**Note:** For information about individual steps, see the list under “SSO/SLO Profile Configuration Steps” on page 150.

Configuring IdP-Initiated SSO

When PingFederate is operating as an IdP, the IdP-initiated SSO profile configuration defines the message-transport mechanisms (bindings) your enterprise has agreed to use for this partner, plus optional digital signature
requirements for outbound assertions (see “Certificates, SSL, and XML Encryption” on page 11).

For this configuration you need to know:

- The transport binding(s) to which you and your partner have agreed
- The certificate to be used for signing assertions (not always required for the artifact binding)
- The URL(s) of your partner’s Assertion Consumer Service(s)

**To configure IdP-initiated SSO:**

1. For SAML 2.0 connections select **IdP-Initiated SSO** on the Profiles screen.
   
   For SAML 1.x connections IdP-initiated SSO is assumed.
   
   See “Choosing Profiles (SAML 2.0)” on page 122.

2. Follow the configuration steps.
   
   See “SSO/SLO Profile Configuration Steps” on page 150 and “Configuring Credentials” on page 164.

**Configuring SP-Initiated SSO**

The SP-initiated profile configuration for SSO defines the message-transport mechanisms (bindings) and security requirements for receiving authentication requests and sending assertions when your SP partner initiates SSO transactions (see “Single Sign-on” in the “Supported Standards” chapter of Getting Started).

For SAML 1.x, the SP-initiated SSO profile is also known as the “destination-first” profile, which was added as a supported “non-normative” use case after the release of the SAML 2.0 specifications. As an IdP, you do not need to configure this profile; when the SP sends an authentication request to your SSO Service endpoint, PingFederate will handle the response automatically.

For this configuration you will need to know:

- The endpoint URL(s) for your SP’s Assertion Consumer Service(s)
- The transport bindings that you and your partner have agreed upon inbound and outbound
- The certificates you will use to sign outbound assertions and to verify incoming digital signatures from your SP, when either is required

When Artifact is an allowable inbound SAML binding, you also need to know the endpoint(s) to your partner’s Artifact Resolution Service(s) and the SOAP client authentication mechanism to use: either HTTP Basic, SSL client certificates, a digital signature, or a combination of these mechanisms.

**To configure SP-initiated SSO:**

1. Select **SP-Initiated SSO** on the Profiles screen.
   
   See “Choosing Profiles (SAML 2.0)” on page 122.
2. Follow the configuration steps.

   See “SSO/SLO Profile Configuration Steps” on page 150 and “Configuring Credentials” on page 164.

### Configuring IdP-Initiated SLO

The SAML 2.0 IdP-initiated SLO profile configuration defines the message-transport mechanisms (bindings) and security requirements for exchanging SLO requests and responses.

**Note:** SLO is not supported by the SAML 1.x specifications.

For more information about SLO, see “Single Logout” in the “Supported Standards” chapter of *Getting Started*.

For this configuration you need to know:

- The transport bindings to which you and your partner have agreed to send SLO requests and receive responses
- The certificates to be used for signing outgoing messages and for verifying incoming digital signatures from your SP (not always required for the artifact binding)
- The URL(s) of your SP's Single Logout Service(s)

**To configure IdP-initiated SLO:**

1. Select **IdP-Initiated SLO** on the Profiles screen.

   See “Choosing Profiles (SAML 2.0)” on page 122.

2. Follow the configuration steps.

   See “SSO/SLO Profile Configuration Steps” on page 150 and “Configuring Credentials” on page 164.

### Configuring SP-Initiated SLO

The SAML 2.0 SP-initiated SLO profile configuration defines the message-transport mechanisms (bindings) and security requirements that you and your partner have agreed upon for exchanging SAML requests and responses.

**Note:** SLO is not supported by the SAML 1.x specifications.
For more information about SLO, see “Single Logout” in the “Supported Standards” chapter of Getting Started.

For this configuration you need to know:

- The transport bindings that you and your partner have agreed upon to send SLO requests and receive responses
- The certificates to be used for signing outgoing messages and for verifying incoming digital signatures from your SP (not always required for the artifact binding)
- The URL(s) of your SP's Single Logout Service(s)
- The URL of your SP's Artifact Resolution Service(s)—if this binding and endpoint are different from your SSO configuration—and SOAP client authentication requirements

**To configure SP-initiated SLO:**

1. Select **SP-Initiated SLO** on the Profiles screen.
   
   See “Choosing Profiles (SAML 2.0)” on page 122.

2. Follow the configuration steps.
   
   See “SSO/SLO Profile Configuration Steps” on page 150 and “Configuring Credentials” on page 164.

**SSO/SLO Profile Configuration Steps**

The following sections provide information about profile configuration steps:

- “Setting Assertion Consumer Service URLs (SAML)” on page 150
- “Setting a Default Target URL (SAML 1.x)” on page 152
- “Defining a Service URL (WS-Federation)” on page 152
- “Specifying SLO Service URLs (SAML 2.0)” on page 153
- “Choosing Allowable SAML Bindings (SAML 2.0)” on page 154
- “Configuring Signature Policy” on page 157
- “Configuring XML Encryption Policy (SAML 2.0)” on page 158

---

**Important:** After modifying Web SSO profiles, you must click **Save** on the Web SSO screen.

---

**Setting Assertion Consumer Service URLs (SAML)**

At this step for SAML connections, you associate bindings to the **Assertion Consumer Service** (ACS) endpoint(s) where your SP will receive assertions. This configuration applies to either SSO Profile (see “Choosing Profiles (SAML 2.0)” on page 122).
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default (SAML 2.0)</td>
<td>A check in this checkbox indicates that the URL configuration in that row will be used as a default. You must select a default, even if only one endpoint is identified.</td>
</tr>
<tr>
<td>Index (SAML 2.0)</td>
<td>Uniquely identifies multiple ACS endpoints.</td>
</tr>
<tr>
<td>Binding</td>
<td>The method of transmission: POST or Artifact.</td>
</tr>
<tr>
<td>Endpoint URL</td>
<td>A location to which the assertion is sent, according to partner requirements.</td>
</tr>
</tbody>
</table>

To reach this screen:
1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO.
4. Click Assertion Consumer Service URL in the steps list.

To define an Endpoint URL:
1. Select the Binding your partner specifies for the Endpoint.
2. (Optional) Enter an Index value — 0 or 1, for example.
   - For SAML 2.0 the specifications provide for the use of index numbers to identify multiple ACS endpoints. PingFederate supplies this number automatically; however, you can manually set the number to match your partner's configuration as needed.
3. Enter the fully qualified Endpoint URL or just a relative path if you have defined a base URL (see “General Information” on page 119).

4. For SAML 2.0 connections, if this is the default (or only) endpoint, click the checkbox under Default.

5. Click Add.

**Setting a Default Target URL (SAML 1.x)**

This URL is used whenever PingFederate receives an SSO request from a local application that does not include the user's target resource URL at the SP site. The URL is required regardless of whether you expect your local application(s) to specify the target—to ensure that the server functions correctly during SSO events.

**Field Descriptions**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Target URL</td>
<td>The URL of the target SP resource.</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click a connection name on the Main Menu.

   Click **Manage All SP**, if needed, to see a full list of connections.

2. Click **Web SSO** in the steps list.

3. Click **Configure Web SSO**.

4. Click **Default Target URL** in the steps list.

**Defining a Service URL (WS-Federation)**

The Service URL is the WS-Federation endpoint of your SP partner where you send SAML assertions and SLO cleanup messages. The assertions are transmitted within an RSTR (Request for Security Token Response) message in response to a request for authentication from the SP. SLO cleanup messages are sent to WS-Federation SP partners when the IdP receives a user's SLO request. Such cleanup messages indicate that the user's local session has been terminated.
Enter the fully qualified URL or just the relative path if you have defined a base URL (see “General Information” on page 119).

You must include the initial slash if you are entering only a relative path.

**Specifying SLO Service URLs (SAML 2.0)**

At this step you associate bindings to the endpoints where your SP receives logout requests when SLO is initiated at your site and where you send SLO responses when you receive SLO requests from the SP.

This step applies only to SAML 2.0 connections when you select either SLO profile (see “Configuring IdP-Initiated SLO” on page 149 or “Configuring SP-Initiated SLO” on page 149).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binding</td>
<td>The method of transmission: POST, Artifact, Redirect, or SOAP.</td>
</tr>
<tr>
<td>Endpoint URL</td>
<td>A location to which logout messages are sent, according to SP requirements.</td>
</tr>
</tbody>
</table>
Chapter 5
Identity Provider Configuration

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click Manage All SP, if needed, to see a full list of connections.

2. Click Web SSO in the steps list.

3. Click Configure Web SSO.

4. Click SLO Service URLs in the steps list.

To add a URL

1. Select the Binding type.

2. Enter the fully qualified URL (or the relative path, if you have specified a base URL—see “General Information” on page 119).

3. (Optional) Enter the Response URL.

4. Click Add.

To edit an endpoint:

1. Click Edit under Action for the endpoint.

2. Make your change and click Update.

To delete an entry:

1. Click Delete under Action for the endpoint.

Choosing Allowable SAML Bindings (SAML 2.0)

At this step for SAML 2.0 connections, you select the binding(s) that your SP partner will use to send SAML authentication requests or SLO messages.

This configuration applies to SP-initiated SSO and to either SLO profile (see “Choosing Profiles (SAML 2.0)” on page 122).
To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO.
4. Click Allowable SAML Bindings in the steps list.

Setting an Artifact Lifetime (SAML)

When you send an artifact to your SP's Assertion Consumer Service or SLO service (for SAML 2.0), an element in the message indicates how long it should be considered valid.

You can change the default value per your requirements, if needed. Also consider synchronizing clocks between your server and your partner's SAML gateway server. If clocks are not synchronized, you might need to set the artifact lifetime to a higher value.
Chapter 5
Identity Provider Configuration

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO.
4. Click Artifact Lifetime in the steps list.
   This step appears only if you have selected the artifact binding for either a Web SSO or SLO Service (under SAML 2.0) at the SP site.

Specifying Artifact Resolver Locations (SAML 2.0)

This endpoint or group of endpoints is where your server will send back-channel requests to resolve artifacts received from your partner. The locations are also known collectively under SAML specifications as the Artifact Resolution Service.

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO.
4. Click Artifact Resolver Locations in the steps list.
   If this step does not appear, you do not have Artifact selected under Allowable SAML Bindings.
To configure the Artifact Resolver Location(s):

1. Enter a URL on the Artifact Resolver Locations screen and click Add.

   The URL must be fully qualified (defining protocol, host, and port) unless you have entered a base URL (see “General Information” on page 119).

   Repeat this step if your SP supports multiple services. The SAML 2.0 specifications permit multiple artifact resolution services through the use of Index numbers, which PingFederate automatically supplies when you add a service. Alternatively, if needed per partner specifications, you may assign these index numbers manually.

   **Note:** When specifying multiple artifact resolution endpoints, each endpoint must share the same transport protocol. That is, if one endpoint uses HTTP, then all must use HTTP. Similarly, if one endpoint uses HTTPS, then all must use HTTPS.

2. Click Next.

**Configuring Signature Policy**

The Signature Policy screen provides options controlling how digital signatures are used for SSO Internet messaging. The choices made on this screen depend on your partner agreement (see “Digital Signing Policy Coordination” on page 13).

Digital signing is required for SAML Response messages sent from your site via POST (or Redirect for SAML 2.0). Optionally, SSO authentication requests from the SP (SP-initiated SSO) may also be signed to enforce security. (This option appears only for SAML 2.0 connections and only if you have enabled SP-initiated SSO using the POST or redirect bindings.)

The assertions inside SAML Responses may be also be signed. When you make this choice, only the assertion portion of the Response is signed, not the complete Response. (This is the only option that appears for SAML 1.x connections.)

- Make your choices and click **Next**, or just click **Next**, with check boxes cleared, if no additional security is required.
Configuring XML Encryption Policy (SAML 2.0)

For SAML 2.0 configurations, in addition to using signed assertions to ensure authenticity, you and your partner may also agree to encrypt all or part of an assertion to improve privacy. This feature is commonly used if the assertion might pass through an intermediary (such as a user's browser) and HTTPS is not used.

If the name identifier (or SAML_SUBJECT) of an assertion is encrypted, you and your partner may also want to encrypt the identifier in subsequent single-signoff messages (if you are using an SLO profile).

Note that “The entire assertion” selection on the Encryption Policy screen includes the SAML_SUBJECT and all attributes.

To reach this screen:

1. Click a connection name on the Main Menu. 
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO on the Web SSO screen.
4. Click Encryption Policy in the steps list.

To define XML encryption:

1. Choose whether you want to encrypt the entire assertion or one or more attributes.
2. If you are encrypting the name-identifier attribute, use the checkboxes near the bottom of the screen to indicate whether you will also encrypt this...
attribute in outbound SLO messages and/or allow its encryption for inbound messages.

3. Click Next or Done.

To disable previously configured XML encryption selections:
1. Select None and then Done.
2. Click Save on the Web SSO screen.

Editing and Saving Web SSO Configurations

On the Summary screen you can review or edit your Web SSO configuration.

To reconfigure saved profiles:
1. Click the heading over the information you want to change.
2. Click Done on the screen containing your change.
   
   If you need to make dependent or other changes, do so and continue by clicking Done until you reach the Web SSO screen.
3. Click Save on the Web SSO screen.

Configuring the Attribute Query Profile

At the Attribute Query step you configure your connection to respond to requests for user attributes from your partner SP, if you have chosen this profile (see “Choosing Profiles (SAML 2.0)” on page 122). Attribute queries are not dependent on single sign-on but may be used independently or in conjunction with Web SSO or provisioning to provide flexibility in how a user authenticates with SP applications (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).
To continue, click Configure Attribute Query Profile.

**Defining Retrievable Attributes**

On this screen you specify the user attributes you and your partner have agreed to allow in an attribute query transaction. Note that the SP may not necessarily request all of these attributes in each attribute-query request. Instead, the list simply limits the request to a subset of these attributes.

To add an attribute:
- Enter the attribute name in the text box and click Add.

To edit an attribute name:
1. Click Edit and make your change.
2. Click Update.

To delete an attribute:
- Click Delete.
Managing SP Connections

Choosing a Data Store

Because no user authentication is performed in response to an attribute-query request, you cannot use attributes drawn from the user's session (see “IdP Adapter Mapping” on page 128). Therefore, you must identify a data store that contains the attributes on your system.

Configuring Data Store Lookup

The process of configuring PingFederate to look up attributes in a data store for attribute-query responses is similar to that used for SSO Attribute Sources and User Lookup. For detailed information, see the step-by-step procedures in the sections indicated below.

If you use a JDBC data store, see:
- “Selecting a JDBC Database Table and Columns” on page 134
- “Configuring a Database Filter (WHERE Clause)” on page 136

If you use a LDAP data store, see:
- “Configuring an LDAP Directory Search” on page 138
- “Configuring an LDAP Filter” on page 139

If you use a Custom data store, see:
- “Configuring Custom Source Filters” on page 141
- “Selecting Custom Source Fields” on page 141

Note that the screen text may differ slightly and only one data store may be configured to supply user attributes. In addition, note that the variable \${SAML_SUBJECT} is available on the Database or LDAP Filter screens to
retrieve the subject identifier from the Attribute Query for use in data-store query statements.

---

**Important:** When attribute queries are sent using XASP, use the variable `${SubjectDN}`—rather than `${SAML_SUBJECT}`—to retrieve the subject identifier. You may also use any of these DN-parsing variables: `${CN}`, `${OU}`, `${O}`, `${L}`, `${S}`, `${C}`, and `${DC}`.

If more than one value exists for any of the parsing variables, then they are enumerated. For example, if the Subject DN is:

```
cn=John Smith,ou=service,ou=employee
```

then you could use any of these elements in your filter qualifier:

```
${SubjectDN}=cn=John Smith,ou=service,ou=employee
${ou}=service
${ou1}=employee
```

For more information about XASP, see “Attribute Query and XASP” in the “Supported Standards” chapter of *Getting Started*.

---

**Attribute Mapping Fulfillment**

The last step in configuring an attribute source is to map values into the assertion to be sent in response to an attribute query.

You map attributes on the Attribute Mapping Fulfillment screen.

---

**Map each attribute into the assertion from one of these Sources:**

- **LDAP/JDBC/Custom**

  Values are returned from your attribute source. When you make this selection, the Value list is populated by the LDAP, JDBC, or Custom attributes you identified for this Attribute Source.
Text

This can be text only, or you can mix text with references to any of the values from your user data store using this syntax:

\$\{ds.attribute\}

where attribute is any of the data store attributes you have selected.

There are a variety of reasons why you might hard code a text value. For example, if your SP's Web application provides a service based on your company's name, you might provide that attribute value as a constant.

Tip: Another selection in the Source drop-down menu, Expressions, may be enabled (see “Using Attribute Mapping Expressions” on page 309). This option provides more complex mapping capabilities—for example, transforming incoming values into different formats. All of the variables available for text entries are also available for expressions.

Specifying Security Policy

This screen allows you to specify the digital signing and encryption policy to which you and your partner have agreed. These selections will trigger requirements for setting up Credentials (see “Configuring Credentials” on page 164).

To configure attribute-query security policy for this partner:

► Check or clear the check boxes and click Next or Done.

Editing and Saving Attribute Query Configurations

To reconfigure saved profiles:

1. Click the heading over the information you want to change.
Chapter 5
Identity Provider Configuration

2. Click **Done** on the screen containing your change. If you need to make additional changes, do so and continue by clicking **Done** until you reach the Attribute Query screen.

3. Click **Save** on the Attribute Query screen.

**Configuring Credentials**

The Credentials screen presents a list of possible security requirements you might need, depending on the federation protocol you are using and the choices you have made.

Your SAML Web SSO or Attribute Query configuration may involve any or all of the following:

- Configuring Back-Channel Authentication
- Configuring Digital Signature Settings
- Selecting Signature Verification Certificates
- Selecting an Encryption Certificate (SAML)
- Selecting a Decryption Key (SAML)

To begin configuring credentials, click **Configure Credentials**.

**Configuring Back-Channel Authentication**

When you configure a profile for inbound SAML messages via the artifact binding, you must specify authentication information for outbound artifact resolution requests over SOAP to your SP’s Artifact Resolution Service.

Similarly, if you configure outbound Assertion Consumer Service or SLO Service URLs to use the artifact binding, then you must configure SOAP authentication requirements for inbound messages such as artifact resolution requests. If you
configure outbound SLO Service URLs to use the SOAP binding, then you must also configure authentication requirements for outbound SOAP messages.

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Credentials in the steps list.
3. Click Configure Credentials.
4. Click Back-Channel Authentication in the steps list.
   If this step is not present, then it is not applicable to your configuration—you have not configured any profiles that use an artifact or SOAP binding or allowed artifact as an inbound SAML binding.

To configure back-channel authentication requirements for sending SOAP messages:
1. On the Back-Channel Configuration screen, click the Configure link to the right of the list of messages to be sent to your partner.
2. Make one or more selections on the Outbound SOAP Authentication Type screen:
   - Basic — you will enter SOAP Basic credentials on a later screen.
   - SSL Client Certificate — you will specify the certificate on a later screen.
   This option is enabled only if you have specified an endpoint that uses SSL.
1. Use Digital Signatures . . . — you will sign the message.
   You will be asked to select a signing certificate on a later screen.

   For SAML 2.0, these options may be used in any combination or independently. For SAML 1.x, you must use either Basic or SSL authentication; digital signing may be added to ensure message integrity.

   By default, PingFederate validates your partner’s SSL server certificate—verifying that the certificate chain is rooted by a trusted Certificate Authority and that the hostname matches the certificate’s Common Name. Clear the associated checkbox if you do not want this validation to occur.

3. Click **Next**.

4. If you chose Basic at step 2, enter the SOAP Username and Password to use for this partner under Basic SOAP Authentication.

   You must obtain these credentials from your partner.

5. If you are using an SSL certificate, select the certificate under SSL Authentication Certificate and click **Next**.

   If you have not yet created or imported the client SSL certificate you need into PingFederate, click Manage Certificates (see “SSL Client Keys & Certificates” on page 92). You will need to export the certificate (only) and send it your partner.

6. On the Summary screen, click **Done**.

**To configure back-channel authentication requirements for receiving SOAP messages:**

1. On the Back-Channel Configuration screen, click the **Configure** link to the right of the list of messages to be received from your partner.

2. Select one or more options on the Inbound SOAP Authentication Type screen:
   - **Basic** — Enter the logon username and password your partner will use on the next screen.
   - **SSL Certificate** — Specify certificate verification information on a later screen.
   - **Use Digital Signatures . . .** — Incoming messages must be signed.

   You will be asked to select a signature verification certificate on a later screen.

   For SAML 2.0, these options may be used in any combination or independently. For SAML 1.x, you must use either Basic or SSL authentication; digital signing may be added to ensure message integrity.

3. Click **Next**.
4. If you chose Basic at step 2, enter the SOAP Username and Password under Basic SOAP Authentication.

**Important:** If you are configuring more than one connection that uses the artifact or SOAP profile, you must ensure that the Username is unique for each connection.

5. If you are using an SSL certificate, select Anchored or Unanchored under Certificate Verification Method.
   - Anchored — The certificate must be signed by a trusted Certificate Authority, and the CA's certificate must be imported into the PingFederate Trusted CA store (see “Trusted CAs” on page 87).
   - Unanchored — The certificate is self-signed or you wish to trust a specified certificate.

**Note:** When anchored certificates are used between partners, certificates may be changed without sending the update to your partner. If the certificate is unanchored, any changes must be promulgated.

6. Click **Next**.

7. If you chose anchored SSL certificate verification at step 5, enter the Subject DN and click **Next**.

**Tip:** If you have not yet defined the certificate in PingFederate or you do not know the DN, return to the previous screen and check Unanchored. Then click **Next** and click **Manage Certificates** on the SSL Verification Certificate screen to import the certificate, if needed, or to view its DN.

8. If you chose unanchored SSL certificate verification at step 5, select the certificate you will use to validate the SSL connection.

   If you have not yet imported the certificate into PingFederate, click **Manage Certificates**.

9. Click **Next**.

10. On the Summary screen, click **Done**.

**Configuring Digital Signature Settings**

This step defines the private key/certificate that you will use to sign assertions and SLO messages for this SP.

**Note:** Digital signing is required for SSO assertions and SLO messages sent via POST or redirect bindings. Signing is not always required for profiles using the artifact or SOAP bindings.
The step applies to both IdP- and SP-initiated SSO and to either SLO profile (see “Choosing Profiles (SAML 2.0)” on page 122) whenever outbound POST or redirect bindings are used. The step also is required if you chose to sign the SAML assertion, SAML response, or artifact resolution messages (see “Configuring Back-Channel Authentication” on page 164).

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click Manage All SP, if needed, to see a full list of connections.

2. Click Credentials in the steps list.

3. Click Configure Credentials.

4. Click Configure Digital Signing Settings in the steps list.

   This step does not appear if your connection’s configuration does not require it.

To specify a certificate:

1. Select the certificate from the drop-down list.

   If you have not yet created or imported your certificate into PingFederate, click Manage Certificates (see “Digital Signing and Decryption Keys & Certificates” on page 94).

2. (Optional) If you have agreed to send your public key with the SAML message, click the checkbox to implement this requirement.

Selecting Signature Verification Certificates

Under SAML 2.0 specifications, when your site receives any SAML 2.0 messages via the POST or Redirect bindings, the messages must be digitally signed. Signing is also always required for the SAML 1.x POST binding and for WS-Federation assertions.

Depending on your agreement with this SP, SSO assertions, SAML 2.0 artifacts, or SOAP messages might also require signatures.
Whenever signatures are required, you must import your partner’s public key certificate into the PingFederate store for signature verification.

**Tip:** To prevent any interruption of service due to an expired certificate, you can ask your partner for a new certificate in advance and use it in the Secondary certificate field. The PingFederate server will use the primary certificate until it expires and then try the secondary.

**Note:** This screen differs significantly between SAML 2.0 and SAML 1.x—see procedures below.

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Credentials in the steps list.
3. Click Configure Credentials.
4. Click Signature Verification Certificate in the steps list.
   - If this step does not appear, then your configuration does not require a verification certificate.

To specify a verification certificate for SAML 2.0:

1. Select the certificate from the drop-down list.
   - If you have not yet imported the certificate into PingFederate, click Manage Certificates.
2. Optionally, select a Secondary certificate for backup.
   - Use this field if your partner has sent you a new certificate to replace one that is ready to expire. The server will automatically verify against the secondary certificate when the primary one expires.
Selecting an Encryption Certificate (SAML)

To enable XML encryption of all or part of an SSO assertion, you must identify the encryption certificate you will use (see “Configuring XML Encryption Policy (SAML 2.0)” on page 158).

You must also select a certificate if your requirements include encrypting an assertion in response to an attribute query (see “Specifying Security Policy” on page 163).

To reach this screen:

1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Credentials in the steps list.
3. Click Configure Credentials.
4. Click Select XML Encryption Certificate.

If this step is not present, you have chosen not to encrypt the assertion or the SAML_SUBJECT (see “Configuring XML Encryption Policy (SAML 2.0)” on page 158).

To identify the encryption certificate:

1. (Optional) Change the default settings under Block Encryption Algorithm and/or Key Transport Algorithm.
   Due to import control restrictions, the standard JRE distribution supports strong but not unlimited encryption. To use the strongest AES encryption, when permissible, download and install the appropriate version of “Java
Managing SP Connections


For more information about XML block encryption and key transport algorithms, see the “XML Encryption Syntax and ProcessingW3C Recommendation” at http://www.w3.org/TR/xmlenc-core/.

2. From the drop-down list, select the applicable certificate and click Next.
   
   If the certificate is not in the list, click Manage Certificates to import it.

   **Note:** If you have already imported a signature verification certificate for this partner, you can reuse it for XML encryption as long as it is an RSA certificate.

Selecting a Decryption Key (SAML)

If SAML_SUBJECT is encrypted, either by itself or as part of a whole assertion, then all references to this name identifier in SLO requests from your partner may also be encrypted (if the connection uses SP-initiated SLO under SAML 2.0).

To enable XML encryption, you must identify a certificate for PingFederate to use to decrypt incoming SLO messages.

<table>
<thead>
<tr>
<th>SAML2 Connection</th>
<th>Configuring 'saml2' SP Connection</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main</td>
<td>SP Connection</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please select the certificate that corresponds to the private key that you will use to decrypt message content sent to you from your partner. Only RSA keys can be used for XML encryption.

- SELECT -

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click Manage All SP, if needed, to see a full list of connections.

2. Click Credentials in the steps list.

3. Click Configure Credentials.

4. Click Select XML Decryption Key.
   
   If this step is not present, you have chosen not to encrypt the assertion or the SAML_SUBJECT attribute (see “Configuring XML Encryption Policy (SAML 2.0)” on page 158).
To identify the decryption key:

- From the drop-down list, select the applicable certificate and click **Next**.

  If the certificate is not in the list, click **Manage Certificates** to import it (see “Digital Signing and Decryption Keys & Certificates” on page 94).

**Note:** If you have imported a certificate to use for digital signing, you can reuse it for XML decryption as long as it is an RSA certificate.

### Editing and Saving Credential Configurations

From the Summary screen you can review or edit your credentials configuration.

**Important:** When you finish editing existing settings, you must click **Done** on the Summary screen and then **Save** on the Credentials screen. For a new connection, click **Done** and then click **Next** on the Credentials screen. Save the entire connection on the Activation screen (see “Connection Activation and Summary” next).

### Configuring SaaS Provisioning

PingFederate’s SaaS Provisioning (available separately) allows an IdP to create and maintain user accounts at selected service-provider sites in order to streamline SSO (see “SaaS Provisioning” on page 22). Detailed configuration of this feature begins on the SaaS Provisioning screen.

**Note:** This configuration task is presented in the administrative console only when a SaaS provider is selected as the Connection Type (see “Choosing a Connection Type” on page 117) and when provisioning is enabled (see “Choosing Roles and Protocols” on page 63).
To continue, click **Configure Provisioning**.

### Defining a Provisioning Target

Information on the Target screen indicates what account name and password PingFederate will use for authentication to the provisioning API for either Google Apps or salesforce.com. To use this screen, you must have a registered domain with the SaaS provider and a valid account and password that can be used to access the provider’s public Web-service endpoint for provisioning.

For Salesforce, the screen also provides a choice of environments (production or testing).

<table>
<thead>
<tr>
<th>Provisioning Target</th>
<th>Salesforce.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Username</td>
<td><a href="mailto:salesforce@my_company.com">salesforce@my_company.com</a></td>
</tr>
<tr>
<td>Admin Password</td>
<td>**********</td>
</tr>
<tr>
<td>Environment</td>
<td>Production</td>
</tr>
</tbody>
</table>

**To configure the Target:**

1. Enter a valid Admin Email (for Google) or Admin Username (for Salesforce).
2. Enter the Admin Password.
3. For Salesforce channels, select the Environment.
4. Click **Next**.
Managing SaaS Channels

A provisioning channel is a mapping configuration between user attributes contained in a source user store and attributes supported or required by the targeted software-service application. You can have multiple channels to the same target as needed—for example, if your organization has separate LDAP stores (or different nodes in the same store) for various user groups needing SSO access and provisioning to the same SaaS domain.

Tip: There can be only one target SaaS domain for a connection (“Defining a Provisioning Target” on page 173). If your organization subscribes to multiple SaaS domains for which you need provisioning and SSO support, you will need a separate SP connection for each domain.

Channels are created and managed from the Manage Channels screen.

To access the Manage Channels screen:
1. In the task headings for a connection, click SaaS Provisioning.
   If this task is not present, provisioning is not enabled (see “Choosing Roles and Protocols” on page 63).
2. On the SaaS Provisioning screen, click Configure Provisioning.

To configure a new channel:
- Click Create and follow the configuration steps.

Tip: If you are creating a second channel to a SaaS vendor, you may wish to copy an existing channel and make necessary changes.
To copy a channel:
1. Click Copy under Action for the channel you want to copy.
2. Enter new General Info for the channel (see “Specifying Channel Information” on page 175).
3. Make any further changes needed for the new channel.

To edit a channel:
- Click the Channel Name link.

To delete a channel:
1. Under Action, click Delete for the channel.
   (To undo the deletion, click Undelete.)

   **Note:** The Delete function is not available if the channel is active (see “Channel Activation and Summary” on page 183).
2. To confirm the deletion, click Done and then Save on the Configure SaaS Provisioning screen.

### Specifying Channel Information

On the Channel Info screen, specify a unique identifier for the channel.

![Channel Info Screen](image)

**Tip:** Adjust the Max Threads setting as needed to optimize data-transfer performance, particularly if large numbers of records need to be provisioned at the target site.

### Identifying the Source Data Store

PingFederate fully supports Active Directory and the Sun Directory Server as source user repositories for SaaS Provisioning. However, you can use other types of LDAP servers, either identifying them as Generic or registering them with PingFederate (see “Configuring an LDAP Connection” on page 76).
Information from your user data store is used to supply mapped values for each user attribute required by the SaaS provider (see “Mapping Attributes” on page 180).

On the Source screen, choose the LDAP store to use for this channel.

**Note:** If the correct data store is not listed, then it has not yet been identified to PingFederate; click Manage Data Stores to set a connection to user store (see “Configuring an LDAP Connection” on page 76).

### Modifying Source Settings

The Source Settings screen shows the default configuration of the data store selected on the previous screen, including settings used by the PingFederate provisioner to determine when user information has been added, changed, or removed.
If you are using the Sun Directory Server or Active Directory, in most cases no changes are needed on this screen unless your data store uses a customized schema.

If you are using a different LDAP directory, you must supply the required information on this screen unless you have defined a template for the data store (see “Defining an LDAP Type” on page 78).
## Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry GUID Attribute</td>
<td>The name of the attribute in the data store representing the user’s Globally Unique Identifier.</td>
</tr>
<tr>
<td>GUID Type</td>
<td>Indicates whether the GUID is stored in binary or text format. Active Directory is always binary. Other LDAP stores most often use text.</td>
</tr>
<tr>
<td>Member of Group Attribute</td>
<td>A multi-value user attribute containing the DNs of the groups to which an entry belongs. This attribute does not apply to some LDAP servers, including the Sun Directory Server. The attribute below is used instead. Active Directory uses both values to provide a two-way mapping between User and Group objects.</td>
</tr>
<tr>
<td>Group Member Attribute</td>
<td>The name of a multi-value group attribute used to track membership in the group using either DN or GUID values.</td>
</tr>
<tr>
<td>User Object Class</td>
<td>The LDAP object class to which user entries belong, used to restrict search results to user entries only.</td>
</tr>
</tbody>
</table>
| Changed Users Algorithm       | The method by which PingFederate determines if user records have been updated or new records added, thus requiring provisioning updates at the target SaaS site. The three choices are:  
  **Active Directory USN** – For Active Directory only, this algorithm queries for update sequence numbers on user records that are larger than the last time records were checked.  
  **Timestamp** – Queries for timestamps on user records that are not older than the last time records were checked. This check is more efficient from the point of view of the PingFederate provisioner but can be more time consuming on the LDAP side, particularly with the Sun Directory Server.  
  **Timestamp No Negation** – Queries for timestamps on user records that are newer than the last time records were checked. This algorithm is recommended for the Sun Directory Server. |
| USN Attribute                 | The name of the attribute used to store the update sequence number—applicable when the Active Directory algorithm is chosen above. |
| Timestamp Attribute           | The name of the attribute used to store the timestamp on user records. |
| Account Status Attribute      | The name of the attribute in which the user’s account status (active or inactive) is stored. |
Indicate on the Source Location screen where PingFederate should look for user records in the data store.

After specifying the required Base DN, you have two options for indicating which users are to be provisioned: the search can be based either on a specified LDAP filter or on group membership. (If needed for special situations, both methods can be used.)

### Specifying a Source Location

Indicate on the Source Location screen where PingFederate should look for user records in the data store.

After specifying the required Base DN, you have two options for indicating which users are to be provisioned: the search can be based either on a specified LDAP filter or on group membership. (If needed for special situations, both methods can be used.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Status</td>
<td>Indicates the user’s status if the attribute is missing.</td>
</tr>
<tr>
<td>Account Status Algorithm</td>
<td>The method by which PingFederate determines a user’s account status. The values are:</td>
</tr>
<tr>
<td></td>
<td><strong>Active Directory Bitmap</strong> – For Active Directory, which uses a bitmap for each user entry.</td>
</tr>
<tr>
<td></td>
<td><strong>Flag</strong> – For Sun and other LDAP directories, which use a separate attribute to store the user’s status. When this option is selected, the two fields below are also used.</td>
</tr>
<tr>
<td>Flag Comparison Value</td>
<td>Indicates what value to check the flag against — for example, ENABLED or ACTIVE.</td>
</tr>
<tr>
<td>Flag Comparison Status</td>
<td>Indicates whether the user is enabled or disabled when the flag has the value specified in the Flag Comparison Value field. For any other value the user will have the opposite status.</td>
</tr>
</tbody>
</table>
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Base DN</td>
<td>The base distinguished name of the tree structure where user records are stored. PingFederate looks only at this node level or below it for user accounts that need to be provisioned.</td>
</tr>
<tr>
<td>Group DN</td>
<td>The group distinguished name associated with the user store, if applicable—required if a Filter is not used (see below).</td>
</tr>
<tr>
<td>Filter</td>
<td>An LDAP search filter—required if a Group DN is not used. For information about LDAP filters, refer to your LDAP documentation. Note that you may need to escape any special characters.</td>
</tr>
</tbody>
</table>

To specify a location:
1. Enter the User Base DN.
2. Enter either a Filter, a Group DN (or both if needed).

Mapping Attributes

The Attribute Mapping screen provides a means of managing how attributes from your user store are mapped to the provisioning fields supported for your organization’s SaaS-customer account.

Tip: PingFederate automatically retrieves from the SaaS vendor the Field Names shown on this screen, but only on the first pass through the screen flow. If you are using this screen to modify an existing mapping configuration, click Refresh Fields near the bottom of the screen to synchronize the list with the target data store if needed.
For each field, the screen provides a means of adding or modifying the mapping details (see the next section, “Specifying Mapping Details”).

**Note:** All required attributes listed in the Field column, indicated with asterisks, must be mapped. Click **View Partner Field Specifications** near the bottom-left of the screen for a summary of requirements for all fields specified for the target SaaS partner.

For some fields, PingFederate preselects LDAP attributes commonly used to store the required values.

**To configure attribute mapping:**

1. Click **Edit** under Action for a field.
2. On the Specify Attribute Mapping screen, provide mapping details.
   (For more information, see the next section, “Specifying Mapping Details”.)
3. Repeat for each attribute shown in the Field Name column as needed.
Tip: If you need to map more than one attribute from your data store into a single field at the target location, then you must use an OGNL expression to indicate how the attribute values are to be combined. The use of OGNL expressions may not be enabled for your PingFederate installation (see “Using Attribute Mapping Expressions” on page 309).

Specifying Mapping Details

On this screen, you define specific mapping information for each field required for provisioning (and for any optional fields, as needed).

Caution: If end-users at your site are permitted to edit some of their own attributes directly in the LDAP store, ensure that the attributes are restricted and do not include any attributes needed by the SaaS provider to grant permissions.
To define mapping information for an attribute:

1. Select the Root Object Class containing a user-store attribute that you want to map to the SaaS attribute shown under Field.

   **Note:** For some required fields, you may not need to map specific user attributes. If so, supply a Default Value instead—skip this step and go to step 5. You can also do both as needed: specify LDAP attributes as well as a Default Value.

2. Under Attribute, select an attribute from the class.

3. Click **Add Attribute**.

4. Repeat the steps above to add additional applicable attributes, as needed, to use in a mapping expression.

5. Under Value Definition, enter or select a **Default Value** (optional, if one or more attributes is specified above).

   A drop-down list is shown for this field if the SaaS vendor requires a choice among specified values. When an expression is also supplied, the default value is sent during provisioning if an error occurs evaluating the expression.

6. If more than one attribute is used for mapping, enter an **Expression**.

   **Tip:** Click **Test** to validate the expression.

   For information about the expression language supported by PingFederate, OGNL, see “Using Attribute Mapping Expressions” on page 309.

   **Important:** The use of OGNL expressions may not be enabled for your PingFederate installation (see “Enabling/Disabling Expressions” on page 310).

7. (Optional) Select one or more processing Options, as defined below:

   - **Create Only** – The field is provisioned only once and not subsequently updated.
   - **Trim** – Removes any white space from the attribute value(s).
   - **Upper Case/Lower Case/None** – Transforms the attribute value(s) to the case indicated, unless None is selected (the default).

**Channel Activation and Summary**

When you finish setting up a channel, you may choose to activate it immediately; or you can return to the Activation & Summary screen and activate the channel when needed. Note that the overall SP connection for the SaaS
partner also must be active for any provisioning channels to be enabled (see “Connection Activation and Summary” on page 184).

Caution: When a connection containing a newly activated channel is itself activated, initial provisioning occurs as soon as the synchronization-frequency time period expires (see “Configuring SaaS Provisioning Settings” on page 67). The default is 60 seconds. Initial provisioning can consume considerable processing time, depending on the amount of data that needs to be transmitted; administrators may wish to plan accordingly.

Important: Regardless of whether you choose to activate a new channel immediately or later, if you want to save the channel configuration, click Done on the Summary screen and then Save on the connection Activation and & Summary screen. (For a new channel in an existing connection, click Save on the SaaS Provisioning screen.)

You can deactivate a channel at any time (for maintenance, for example). When a channel is inactive, SSO/SLO transactions can still occur (if the connection is active), but provisioning is suspended.

To change a channel status:

- Select either Active or Inactive and then click Done.

To modify a channel setting:

- If you know which step needs to be modified, click its link in the steps list.

If you do not know where to change a setting, locate the currently configured setting under one of the summary headings and then click the subheading above the information.

Connection Activation and Summary

When you finish setting up a connection, you may choose to activate it immediately. No messages are actually sent or received until your partner’s federation gateway is also established and a user initiates an SSO or SLO event.

Important: Regardless of whether you choose to activate a new connection now or later, you must click Save on the Summary screen for a new connection if you want to keep the configuration.
Defining SP Affiliations

You can deactivate a connection at any time (for maintenance, for example). When a connection is inactive, all SSO or SLO transactions to or from this partner are disabled.

Tip: The SSO Application Endpoint near the top of the Summary screen is an example URL that webmasters or Web application developers at your site might use to invoke SSO for the connection. For details about SSO and other server endpoints, including optional query parameters, see “Application Endpoints” on page 289.

To change a Connection Status:

- Select either Active or Inactive and then click Save.

To modify a connection setting:

1. If you know which step needs to be modified, click its link in the steps list.
   
   If you do not know where to change the setting, locate the currently configured data under one of the summary headings and then click the subheading above the data.

2. Change the information on the step screen and click Save, if available.
   
   If Save is not available, you are in the middle of a task (see “About Tasks and Steps” in the “Console Navigation” chapter of Getting Started); click Next or Done until you reach a screen containing a Save button. Then click Save and continue as needed until you return to the Main Menu.

   If your modification requires related configuration changes, PingFederate provides error messages indicating the necessary steps and then guides you to the related screens (unless you click Cancel).

Important: Be sure to click Save whenever that button appears, if you want to keep your changes.

Defining SP Affiliations

An SP affiliation is a SAML 2.0 specification that permits a group of service providers to make use of the same persistent name identifier for account linking (see “Account Linking” on page 6).

This may be of use when multiple service providers share a business relationship in which users need services from each affiliated provider. By agreement among the affiliation members, the same pseudonym can be used to populate the
You can create or modify an SP affiliation from the Main Menu or from a list of affiliations (click Manage All Affiliations).

**To create an SP affiliation:**
- Click Create New under SP Affiliations on the Main Menu.
- Or:
  - Click Manage All Affiliations and then click Create Affiliation on the Select an Affiliation screen.

**To delete an affiliation:**
1. Click Manage All Affiliations under SP Affiliations on the Main Menu.
2. Click Delete under Action for the affiliation you want to delete.
3. Click Save to confirm the deletion (or click undelete).

**To view or modify an affiliation:**
- Click the affiliation name, or click Manage All Affiliations if the ID does not appear.

### Using the Manage Affiliations Screen

You can manage SP affiliations on this screen.

![Manage Affiliations Screen]

**To reach this screen for editing:**
- Click Manage All Affiliations under SP Affiliations on the Main Menu.

**To begin creating a new affiliation:**
- Click Create Affiliation (see the next sections for more information).
To delete an affiliation:
1. Click **Delete** under Action for the affiliation you want to delete.
2. Click **Save** to confirm the deletion (or click **undelete**).

To view or modify an affiliation:
► Click the affiliation ID.

Importing Affiliation Metadata

An IdP may send a metadata file containing information that automatically specifies members of an SP affiliation for use in PingFederate.
► If you do not have a metadata file, click **Next**.

To import metadata:
1. Click **Browse** to locate and import the file and then click **Next**.
2. Review the information on the Create Affiliation page (see the next section).
3. Click **Save** on the Summary screen.

Entering Affiliation Information

Enter or modify basic information about an affiliation on the Affiliation General Info screen.

If you imported a metadata file, this information is already supplied. However, you may change the Affiliation ID or select a different Affiliation Owner, if required.

**Field Descriptions**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliation ID</td>
<td>A unique identifier for this affiliation. This value serves as the Name ID qualifier for SAML assertions sent to affiliated SP partners.</td>
</tr>
</tbody>
</table>
Managing Affiliation Membership

On the Affiliation Membership screen, you create and manage a list of SP connections to be included in the affiliation.

If you imported a metadata file, this information is already supplied. However, you may add or remove connections from the affiliation.

To add an SP partner connection to the affiliation, select the connection from the drop-down list and click Add.

Important: Each connection in the affiliation must be configured to use the same IdP adapter instance for generating account links (see “IdP Adapter Mapping” on page 128).

To remove a member of the affiliation, click Delete under Action for the connection and click Save.

Note: If you delete an affiliation member supplied by an imported metadata file and then save the affiliation, that connection will not appear in the drop-down list for re-adding in the future.

Activating and Editing the Affiliation

From the Affiliation Management Summary screen you can activate or deactivate an SP affiliation. You also save new affiliations on this screen, or you can click heading links to go back and modify information.

To change an Affiliation Status:

Select either Active or Inactive and then click Save.
Configuring SP Auto-Connect

To edit a connection:
1. Click the heading above the information you want to modify.
2. Make your change and click Save.

Configuring SP Auto-Connect

When your SP partner is also using PingFederate 5 or higher (or is otherwise able to provide interoperable SAML 2.0 metadata via HTTP on demand), you may choose to use Auto-Connect for that partner (see “Using Auto-Connect” on page 19). This configuration can be shared among an unlimited number of SAML 2.0 partners.

Once Auto-Connect is enabled on your PingFederate server, you complete the configuration from the Main Menu under My IdP Configuration. This configuration entails:
- Setting up a common connection for all Auto-Connect partners
- Establishing a list of SP partner domains authorized to use the connection

Initial Setup

The basic configuration for SP Auto-Connect requires only:
- Defining a period of validity for assertions (assertion lifetime)
- Choosing a signing certificate for assertions and other SAML messages
- Configuring assertion-creation information

All other partner-connection specifications are handled automatically at runtime.

Setting an Assertion Lifetime

Identity-federation standards require a window of time during which an assertion is considered valid. Each assertion has a time-stamp XML element as well as elements indicating the allowable lifetime of the assertion (in minutes) before and after the time stamp.
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes before</td>
<td>The amount of time before the assertion was issued during which it is to be considered valid.</td>
</tr>
<tr>
<td>Minutes after</td>
<td>The amount of time after the assertion was issued during which it is to be considered valid.</td>
</tr>
</tbody>
</table>

To change the default times:

- (Optional) Edit the desired setting(s) and click **Next** or **Save**.

Choosing a Signing Certificate

For Auto-Connect runtime processing, assertions and SLO messages must be signed, since they are sent over either the POST or redirect bindings (see “SAML 2.0 Profiles” in the “Supported Standards” chapter of Getting Started).

**Note:** The signing certificate is embedded in your server’s Auto-Connect metadata (see “Using Auto-Connect” on page 19); there is no need to exchange certificates with your partners.

You can use the same certificate used for signing metadata (see “Configuring Auto-Connect Metadata Signing” on page 68). If you use a different certificate,
ensure that it meets Auto-Connect validation requirements (see “Auto-Connect Security Model” on page 21).

Configuring Assertion Creation

Configuring assertion creation for Auto-Connect is similar to configuring the same settings for regular partner connections.

▶ Click Configure Assertion Creation to continue.

For configuration information, refer to sections under “Assertion Creation” on page 123.

Auto-Connect Activation and Summary

When you finish configuring your SP Auto-Connect initial setup, you may choose to activate the common connection immediately on the Activation & Summary screen. (No runtime processing occurs until your partner’s Auto-Connect gateway is also established and a user initiates an SSO or SLO event.)

Important: Regardless of whether you choose to activate a newly configured connection now or later, you must click Save on the Activation & Summary screen if you want to keep the configuration.

You can deactivate the connection at any time (for maintenance, for example). While a connection is inactive, all SSO or SLO transactions to or from Auto-Connect partners are disabled.

To change a Connection Status:
▶ Select Active or Inactive and then click Save.
To modify a setting:

1. Locate the currently configured setting under one of the summary headings and then click the subheading above the data.

   ![Notes]
   Changes made to Auto-Connect settings will be out of sync, temporarily, with metadata caches that any currently active partners might be using. If your connection is in production, you might wish to lower your server’s metadata lifetime in advance of making configuration changes (see “Configuring Auto-Connect Metadata Lifetime” on page 69).

2. Change the information and click Save, if available.

   If Save is not available, additional, dependent changes are required; click Next or Done until you reach a screen containing a Save button. Then click Save and continue as needed until you return to the Main Menu.

Specifying Allowed SP Domains

This screen provides PingFederate with a list of trusted domain names of your Auto-Connect partners.

![Image of the Allowed SP Domains screen]

Normally, when PingFederate receives an authentication request from a domain in this list, the runtime engine completes the connection automatically using metadata obtained from a standard, public location—http://saml.<domain_name>. (See “Using Auto-Connect” on page 19.) Alternatively, if an Auto-Connect partner elects not to use the standard location, you can supply the applicable URL.
In an SP role, you use the PingFederate administrative console to configure local application-integration information and to manage connections to SAML or WS-Federation gateways located at your IdP-partner sites. You must configure Server Settings from the Main Menu to establish your site as an SP before configuring connections to IdPs (see “Choosing Roles and Protocols” on page 63).

Note that you generally configure only one connection per federation partner, even if you are integrating more than one Web application. You can configure more than one connection, however, if your partner supports multiple federation protocols, or supports multiple federation IDs for the same protocol (see “Federation Server Identification” on page 16).

Under some conditions, you can make secure Web SSO available to an unlimited number of partners at once by configuring a single, common connection (see “Using Auto-Connect” on page 19).

This chapter covers the following major topics:

- “Application Integration Settings” on page 194
- “Federation Settings” on page 202
- “Managing IdP Connections” on page 205
- “Configuring IdP Auto-Connect” on page 265
Chapter 6
Service Provider Configuration

Application Integration Settings

The integration of local applications with PingFederate is the essential “last-mile” configuration that allows end-users at your IdP partner's Web site to access your protected resources. This process is facilitated through the use of application-integration kits and a robust Software Development Kit (see “Integration Kits and Adapters” on page 7).

Under Application Integration Settings on the Main Menu, you configure the SP Adapters that PingFederate uses to create user sessions that allow SSO access to your protected resources. You can also set Default URLs to which users may be directed during SSO or SLO, and you can look up system endpoints that application developers at your site need to access PingFederate's SSO/SLO services.

Configuring SP Adapters

SP adapters are used to create a local-application session for a user in order to provide SSO access to your application(s) or other protected resources (see “Integration Kits and Adapters” on page 7). You can configure multiple instances of adapters (based on one or more adapters) to accommodate the varying needs of your IdP partners.

Note: If you are configuring either the OpenToken or the LDAP Adapter, see “Configuring the IdP OpenToken Adapter” on page 273 or “Configuring the IdP LDAP Adapter” on page 281, respectively.

If you configure more than one adapter instance, then you must map a target URL to at least one instance (see “Mapping URLs to SP Adapter Instances” on page 199).

SP adapter setup is available only if your server is configured as an SP (see “Choosing Roles and Protocols” on page 63).

Important: If you install a new version of an adapter JAR file after setting up connections to instances of that adapter, you might need to reconfigure those connections. To find out, click each connection that uses the adapter (see “Accessing Connections” on page 206). Errors indicating reconfiguration points may be presented.
You reach this screen by clicking Adapters under Application Integration Settings in My SP configuration.

To create a new adapter instance:

- Click Create New Adapter Instance.

See the next section.

To edit an adapter instance:

- Click the Adapter Instance Name link.

To delete an adapter instance:

1. Click Delete next to the Adapter Instance Name on the Manage Adapter Instances screen. (To undo the deletion, click Undelete.)

   \[\text{Note: This option is available only if the adapter instance is not in use for a connection.}\]

2. Click Save to confirm the deletion.

Creating an Adapter Instance

On the Adapter Type screen, you begin creating an instance of an adapter that PingFederate will use for creating security sessions for your applications.
Chapter 6
Service Provider Configuration

To reach this screen:
1. Click Adapters on the Main Menu.
2. Click Create New Adapter Instance on the Manage Adapter Instances screen.

To define an adapter instance:
1. Enter the Adapter Instance Name and Adapter Instance Id on the Adapter Type screen.
2. Select the Adapter Type from the drop-down menu.
3. Click Next and enter information on subsequent screens for this adapter setup, as indicated in the following sections.

Tip: The setup steps and information needed vary with the adapters deployed on your server (see “Integration Kits and Adapters” on page 7). For information about configuring the adapters packaged with PingFederate, see “OpenToken Adapter Configuration” on page 271 or “LDAP Adapter Configuration” on page 279.
4. Click **Done** on the Adapter Summary screen.
5. Click **Save** on the Manage Adapter Instances screen.

**To view or modify adapter settings:**
- Click the Adapter Instance Name.

**To delete an adapter instance:**
1. Click **Delete** next to the Adapter Instance Name on the Manage Adapter Instances screen. (To undo the deletion, click **Undelete**.)

   **Note:** This option is available only if the adapter instance is not in use for any connection.

2. Click **Save** to confirm the deletion.

**Configuring an Adapter Instance**

Configuration parameters on the SP Adapter Instance screen vary according to the adapter you choose. These options are controlled by the adapter software (see “Integration Kits and Adapters” on page 7).

- For information about configuring the OpenToken Adapter, see “Configuring the SP OpenToken Adapter” on page 276.
- For information about configuring the LDAP Authentication Service, see “Configuring the SP LDAP Adapter” on page 284.

**Invoking Adapter Actions**

Adapters can be written to perform configuration assistance or validation actions—for example, testing a connection to an active directory. Actions may also include generation of parameters that might need to be set manually in a configuration file.

- For information about actions available using the OpenToken Adapter, see “OpenToken Adapter Configuration” on page 271.
- For information about actions available using the LDAP Authentication Service, see “LDAP Adapter Configuration” on page 279.
To reach this screen for editing:
1. On the Main Menu under Application Integration Settings for My SP Configuration, click Adapters.
2. Click an Adapter Instance Name.
3. Click Adapter Actions (if available).

To generate a properties list:
► Click Generate properties under Action Invocation Link.

Extending an Adapter Contract
Adapters may be written with an option allowing administrators to add to the attributes required for creating usable sessions. This feature might be needed, for example, by a legacy application that requires different authentication than other applications under the same enterprise identity-management system.

To reach this screen for editing:
1. On the Main Menu under Application Integration Settings for My SP Configuration, click Adapters.
2. Click an Adapter Instance Name.
3. Click Extended Adapter Contract (if available).

To add an attribute:
1. Enter the attribute name in the text box and click Add.
2. Click Done then click Save on the Manage Adapter Instances page.
Editing and Saving SP Adapter Instances

From the Adapter Instance Summary screen, you can reach adapter settings for editing.

**To edit the configuration:**
1. Click the heading above the information you want to change.
2. Click Save on the configuration page and on the Manage Adapter Instances screen.

**To save an adapter instance:**
1. Click Done on the Summary screen.
2. Click Save on the Manage Adapter Instances screen.

---

**Note:** If this is the second adapter instance you have configured, then Save is not yet available; you must choose whether to map the new adapter instance to an application or resource URL. In this case, click Next to continue (see “Mapping URLs to SP Adapter Instances” next).

---

Mapping URLs to SP Adapter Instances

When you configure more than one SP adapter instance, you must map target URLs to at least one adapter instance. Mapping enables you to direct inbound SAML messages to the appropriate application.

For example, this mapping configuration may be necessary in an IdP-initiated SSO scenario that connects to multiple applications at your site. For transactions initiated at your site, this mapping is needed for default situations, in cases where the target and adapter instance are not specified when the SSO/SLO is started (see “SP Endpoints” on page 292). (When this information is provided with the SP request, the mapping table is ignored.)

This screen is available only if your server is configured as an SP and if you are using more than one adapter instance, or if you have previously mapped an adapter instance on this screen.
### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>The target URLs that align with your configured adapter instances. The URLs instruct the PingFederate SP server to route session-creation processing through an adapter instance. If the URL in the incoming request is not matched by the first entry in this table, subsequent entries are tried until a match is found.</td>
</tr>
<tr>
<td>Adapter Instance (drop-down menu)</td>
<td>A selection of configured SP adapter instances.</td>
</tr>
</tbody>
</table>

The order of mapping is significant in that the first matching mapping, from top to bottom, determines which adapter instance receives the SAML message. For example, if two URLs are mapped in the following order:


The URL http://yourapp.com/subapp/start will map to Adapter 1 because it matches mapping a. If the order of the mappings were reversed, http://yourapp.com/subapp/start would map to Adapter 2 because it would find and match mapping b first. (No URLs would fall through if the order were reversed.)

Note that you can use only one wildcard (*) per URL.

**To reach this screen for editing:**

1. On the Main Menu under Application Integration Settings for MySP Configuration, click **Adapters**.
2. Click **Map URLs to Adapter Instances**.

If this step does not appear, then you have created only one adapter instance (see “Configuring SP Adapters” on page 194).
To create adapter mappings:
1. Enter the URL and select an adapter from the drop-down menu.
2. Click Add Mapping.
3. Click Save.

To edit adapter mappings:
1. Click Edit next to the Adapter Instance Name. You can change the URL or select a different adapter from the drop-down menu.
2. Click Update.
3. Click Save.

To delete adapter mappings:
1. Click Delete next to the Adapter Instance Name.
2. Click Save.
   (Click Cancel to abort the deletion.)

To change the order of adapter mappings:
1. Click the up or down arrows at the left to rearrange the order.
2. Click Save.

Configuring Default URLs

As an SP, you can supply a default URL that the end-user may see when SSO succeeds (that is, a session is created at your site) but the target resource is not available or not specified. Similarly, you can specify a default URL indicating a successful SLO to the end-user (if no other page is designated).

Your application or your partner’s application may supply these URLs at runtime (see “SP Endpoints” on page 292); but if none is provided, PingFederate will use the default values you enter on this screen.

**Tip:** If you leave the default URLs blank, PingFederate provides built-in landing pages for the user. These Web pages are among the templates you can modify with your own branding or other information (see “Customizing User-Facing Screens” on page 50).
Chapter 6
Service Provider Configuration

Viewing Application Endpoints

Click Application Endpoints on the Main Menu to see a list of endpoints and descriptions applicable to your federation role (IdP or SP). These endpoints are built into PingFederate and cannot be changed.

Web-application developers at your site need to know the application endpoints to initiate transactions via PingFederate (see “Integration Kits and Adapters” on page 7).

This screen also shows a Maintenance Endpoint that you can use to verify that the PingFederate server is running (see “Maintenance Endpoint” on page 297).

Federation Settings

If your identity federation uses the SAML 2.0 XASP profile (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started), you may need to identify the IdP connection to which an attribute request applies. If so, click **Attribute Requester Mapping** under the Federation Settings section for the SP on the Main Menu.

Also under Federation Settings, you can view protocol endpoints that your federation partners need to know to access your services via PingFederate.

Attribute Requester Mapping

If you are using the XASP profile, the application(s) at your site must supply the Subject Distinguished Name (DN) to identify a user’s X.509 authentication certificate (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started and “/sp/startAttributeQuery.ping” on page 296). Optionally, an application may also supply an Issuer DN, which can be used to
determine the correct IdP (Attribute Authority) to use for a set of users associated with an IdP.

On the Attribute Requester Mapping screen, you can map X.509 identifying information to connections and specify a default connection. You reach this screen from the Main Menu under Federation Settings.

**Note:** The Attribute Requester Mapping link does not appear on the Main Menu unless you have enabled the SAML 2.0 protocol for the SP role (see “Choosing Roles and Protocols” on page 63). You must also select the associated XASP checkbox.

At runtime, PingFederate tries to match the certificate’s Issuer DN (if provided) against the list of Issuer DN(s), in the order shown on this screen, until a match is found. If no match is found, the server tries the Subject DN(s) in order. If no match is found, the Default connection is used.

For Issuer and Subject DNs, you can use a regular expression to match different DNs to the same connection. Only one regular expression may be used in any single entry. DN values must be entered in all lower-case characters.
To map attribute requesters to connections:
1. (Optional) Enter an Issuer DN when applicable, select a SAML 2.0 IdP Connection Name, and click Add.
   Repeat this step as needed for additional DNs.
2. Enter a Subject DN, select a SAML 2.0 IdP Connection Name, and click Add.
   Repeat this step as needed for additional DNs.
3. Select a Default IdP connection.

To edit a mapping:
1. Click Edit for the mapping in the Action column.
2. Make your changes and click Update in the Action column.
3. If you are editing an existing configuration, click Save to confirm the change.

To reorder the mapping list:
- Click the up or down arrow next to a DN.

To delete a mapping:
1. Click Delete for the mapping in the Action column.
2. If you are editing an existing configuration, click Save to confirm the deletion.

Viewing Protocol Endpoints

Click Protocol Endpoints under Federation Settings in the SP Configuration section of the Main Menu to see a list of SAML and/or WS-Federation endpoints—a pop-up window displays only those endpoints related to the federation protocols you have chosen (see “Choosing Roles and Protocols” on page 63). These endpoints are built into PingFederate and cannot be changed.

Your federation partners need to know the applicable SP Services endpoints to communicate with your PingFederate server. Configured service endpoints are included in metadata export files (see “Exporting Metadata” on page 30).

The table below describes each endpoint:

<table>
<thead>
<tr>
<th>Service</th>
<th>URL and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Logout Service (SAML 2.0)</td>
<td>/sp/SLO.saml2</td>
</tr>
<tr>
<td></td>
<td>The URL that receives and processes logout requests and responses.</td>
</tr>
</tbody>
</table>
Managing IdP Connections

As an SP, you manage connection settings to support the exchange of federation protocol messages (SAML or WS-Federation) with an IdP. These settings include:

- User attributes you expect to receive in an SSO assertion (if any).
- User attributes that may be requested using the Attribute Query profile (if that profile is used).
- The protocol and, for SAML, the profile you will use, including detailed security specifications (the use of digital signatures, signature verification, XML encryption, and SSL). For more information see the “Supported Standards” chapter in Getting Started.

To continue with the configuration, you and your federation partner must have decided this information in advance (see “Federation Planning Checklist” on
Your federation partner must supply some connection settings and other information (see “Configuration Data Exchange” on page 18).

Tip: If you are configuring connections to more than one partner under SAML 2.0 specifications, or if you intend to add partners in the future, consider using Auto-Connect (see “Configuring IdP Auto-Connect” on page 265).

As an SP, you respond to user requests for SSO and SLO by creating or closing user sessions, respectively, in local applications. You integrate these applications with PingFederate by configuring them with SP adapter instances (see “Configuring SP Adapters” on page 194). In preparation for configuring a new SSO connection, you will need to know which adapter instance to use (see “Configuring Adapter Mapping and User Lookup” on page 221). (No adapters are required for a connection that uses only the Attribute Query profile—see “Configuring the Attribute Query Profile” on page 253.)

If you intend to pass attribute values to an adapter instance from a local data store, you must define the data store during this configuration, if you have not done so already (see “Managing Data Stores” on page 70).

Accessing Connections

You can create or modify connections directly via the Main Menu. Note that the menu displays the four most-recently modified connections. To view a list of all IdP connections, click the Manage All IdP link.

Using the Main Menu

From the Main Menu, you can configure a new connection, modify an existing connection, or view connections.

Tip: To copy or delete connections or to find connection drafts, click Manage All IdP (see “Using the Manage Connections Screen” on page 208).
To begin configuring a new connection:

- Click Create New under IdP Connections on the Main Menu.
  

**Tip:** If you want to use a virtual ID for a second a connection to the same partner, the fastest way is to click Manage All IdP and copy the first connection (see “Using the Manage Connections Screen” on page 208). For information about virtual IDs, see “Federation Server Identification” on page 16.

To modify a connection:

1. Click the connection name under IdP Connections on the Main Menu.

   Only the four most recently edited connections are displayed. To see all connections, including drafts, click Manage All IdP.

2. On the Activation & Summary screen, click the heading for the information you want to change.

3. Make your change and click Save.

**Note:** If Save is not available, it means your modification requires other changes or you are editing a screen that is part of a series of subtasks. Click Next and continue making indicated changes. The Done button indicates that further changes in the task are optional. When you have no further changes, click Done and then click Save on the task summary screen.
Using the Manage Connections Screen

From the Manage Connections screen, you can configure a new connection, modify or copy an existing connection or draft, or delete a connection (if it is not active). An export function is also provided, which allows you save individual connections.

**Note:** The connection export function results in an XML file that you can modify and import into another PingFederate server at your site (see “Connection Management Service” on page 299).

From this screen, you can also globally override transaction logging levels set for individual connections or restore connection-based logging (see “Runtime Transaction Logging” on page 29).

To access the Manage Connections screen:

» Click **Manage All IdP** under IDP Connections on the Main Menu.

To begin configuring a new connection:

» Click **Create Connection** on the Manage Connections screen.

See “Managing IdP Connections” on page 205 for step-by-step information.

**Tip:** If you need to create a second connection to a partner using a Virtual ID, copy the existing connection and make necessary changes, including adding the Virtual ID on the General Info screen. For information about Virtual IDs, see “Federation Server Identification” on page 16.

To copy a connection:

1. Click **Copy** under Action for the connection you want to copy.
2. Enter new General Information for the connection (see “General Information” on page 212).

3. Make any further changes needed for the new connection.

To edit a connection or continue working on a draft:
   ▶ Click the Connection Name link.
   For a draft, you will return to where you left off.

To export a connection:
1. Click Export under Action for the connection.
2. Save the XML file on your file system.
   You can change the name of the file, but keep the XML extension.

   **Tip:** You can import the connection programmatically or manually into another instance of PingFederate (see “Connection Management Service” on page 299).

To delete a connection:
1. Under Action, click Delete for the connection.
   (To undo the deletion, click Undelete.)

   **Note:** The Delete function is not available if the connection is active.

2. To confirm the deletion, click Save.

To sort the list of connections:
   ▶ Click the arrow next to any column heading to sort the list based on that column.

To filter the list by Protocol and/or Status:
   ▶ Select a filter criterion from either or both of the drop-down lists.

To override connection-based transaction logging:
1. Select On under Logging Mode Override.
2. Choose the logging mode you want to use for all connections.

To restore connection-based transaction logging:
   ▶ Select Off under Logging Mode Override.

**Configuration Steps**

Many steps involved in setting up a federation connection are protocol-independent; that is, they are required steps for all connections, regardless of the associated standards (see the “Supported Standards” chapter in Getting Started).
Also, for any given connection, some configuration steps are required under the applicable protocol, while others are optional. The PingFederate administrative console determines the required steps and dynamically presents optional steps based on your selections.

The remainder of this section provides sequential information about every step you might encounter, regardless of the protocol you are using for a particular connection.

Note: The configuration screens represented in this chapter show “SAML 2.0” in their left corners, unless they are exclusive to WS-Federation or SAML 1.x setup requirements. When the SAML 2.0 screens are also applicable to SAML 1.x and/or WS-Federation connections, the SAML 2.0 representations and discussion also apply to the other protocols, unless otherwise indicated.

Use the lists and links (or page references) below to find specific information about steps that may apply to your connection requirements:

**SAML 2.0 Configuration Steps**

- “Selecting a Protocol” on page 211
- “Importing Metadata” on page 212
- “General Information” on page 212
- “Choosing Profiles” on page 215
- “User-Session Creation” on page 217
- “Configuring Web SSO” on page 235
- “User Provisioning” on page 246 (optional)
- “Configuring the Attribute Query Profile” on page 253 (optional)

Note: You can configure the Attribute Query profile as a stand-alone connection or in conjunction with a SAML 2.0 Web SSO connection.

- “Configuring Credentials” on page 256
- “Connection Activation and Summary” on page 264

**WS-Federation Configuration Steps**

- “Selecting a Protocol” on page 211
- “General Information” on page 212
- “Configuring Web SSO” on page 235
- “User-Session Creation” on page 217
- “User Provisioning” on page 246 (optional)
- “Configuring Credentials” on page 256
Managing IdP Connections

- “Connection Activation and Summary” on page 264

**SAML 1.x Configuration Steps**
- “Selecting a Protocol” on page 211
- “Importing Metadata” on page 212
- “General Information” on page 212
- “Choosing Profiles” on page 215
- “Configuring Web SSO” on page 235
- “User-Session Creation” on page 217
- “User Provisioning” on page 246 (optional)
- “Configuring Credentials” on page 256
- “Connection Activation and Summary” on page 264

For more information, see “Navigating the Administrative Console” in the “Console Navigation” chapter of Getting Started.

**Tip:** You must completely configure a connection before you can save it on the Activation & Summary screen. Until then, the configuration is temporary and can be lost; the console times out after several minutes of inactivity. Before reaching Activation & Summary, however, you can click **Save Draft**, which is available on most screens after you enter General Information (see “Console Buttons” in the “Console Navigation” chapter of *Getting Started*).

**Selecting a Protocol**

If your federation deployment supports multiple protocols, the first step in setting up a connection is to choose the applicable protocol.

**Tip:** If your partner’s deployment also supports multiple protocols and you intend to communicate using more than one, then you must set up a separate connection for each protocol.
To continue configuring a new connection, select the applicable protocol (if needed) and click Next.

For information on enabling or disabling protocol support, see “Choosing Roles and Protocols” on page 63.

Importing Metadata

If you are using one of the SAML protocols and have received a metadata file from your partner, click Browse on the Import Metadata screen, select the file, and click Next. For more information, see “Metadata” in the “Supported Standards” chapter of Getting Started.

**Note:** If the endpoints in the metadata file share the same base URL (protocol, hostname, and port), PingFederate uses this information to populate the Base URL field (see “General Information” on page 212). Consequently, individual endpoints on other screens do not include this information—only relative paths are shown.

**Note:** If you are importing a signed metadata file that does not include the certificate and public key, you will be asked to import the certificate needed to verify the XML signature (see the next section).

If you are not using a metadata file, click Next on the Import Metadata screen.

Importing a Verification Certificate

The Import Certificate screen appears only if the metadata file you have chosen to import is signed and the certificate needed to verify the signature is not contained in the file.

▶ Click Browse to locate and open the XML signature verification certificate for this partner.

Viewing the Metadata Summary

The Metadata Summary screen provides security information about an imported metadata file, including whether the file was signed and, if so, the trust status of the certificate used to verify the signature.

General Information

On the General Info screen, you provide a required unique identifier and display name for a connection, as well as optional contact information. In addition, on this screen you can define a default error message that end users will see in the event that SSO fails, and you can set the level of transaction logging for this connection partner (see “Runtime Transaction Logging” on page 29).
**Managing IdP Connections**

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner’s Entity ID/Issuer/Partner’s Realm (Connection ID)</td>
<td>(Required) The published, protocol-dependent, unique identifier of your partner. For a SAML 2.0 connection, this is your partner’s SAML Entity ID. For a SAML 1.x connection, this is the Issuer your partner advertises. For a WS-Federation connection, this is your partner’s Realm. This ID may have been obtained out-of-band or via a metadata file if you are using a SAML protocol (see “Exporting Metadata” on page 30).</td>
</tr>
</tbody>
</table>
Chapter 6
Service Provider Configuration

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click Manage All IdP, if needed, to see a full list of connections.

2. Click General Info in the steps list.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection Name</td>
<td>A plain-language identifier for the connection—for example, a company or department name. This name is displayed in the connection list on the Main Menu.</td>
</tr>
<tr>
<td>Virtual Server ID</td>
<td>Enter a unique server ID in this field if you want to identify your server to this connection partner using an ID other than the one you specified under Server Settings (see “Specifying Federation Information” on page 65). For information about Virtual Server IDs, see “Federation Server Identification” on page 16.</td>
</tr>
<tr>
<td>Base URL</td>
<td>The fully qualified hostname and port on which your partner's federation deployment runs (e.g., <a href="https://www.pingidentity.com:9031">https://www.pingidentity.com:9031</a>). This entry is an optional convenience, allowing you to enter relative paths to specific endpoints, instead of full URLs, during the configuration process.</td>
</tr>
<tr>
<td>Company</td>
<td>The name of the partner company to which you are connecting.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>The contact person at the partner company.</td>
</tr>
<tr>
<td>Contact Number</td>
<td>The phone number of the contact person at the partner company.</td>
</tr>
<tr>
<td>Contact Email</td>
<td>The email address for the contact person at the partner company.</td>
</tr>
<tr>
<td>Error Message</td>
<td>When an error occurs during a Web SSO operation on this server, the end user's browser is redirected to an error page hosted within . The text you enter here is shown on that page and is intended to help the user understand what he/she should do next.</td>
</tr>
<tr>
<td>Logging Mode</td>
<td>The level of transaction logging applicable for this connection (see “Runtime Transaction Logging” on page 29). Note that you can override connection logging mode settings globally from the connections list (see “Using the Manage Connections Screen” on page 208).</td>
</tr>
</tbody>
</table>
For a new connection:

- Fill in the information needed and click **Next**.

  Connection ID and Connection Name are required (see “Field Descriptions” above).

  Note that the Virtual ID identifies your own federation deployment for this connection only and overrides the ID you specified under Server Settings (see “Federation Server Identification” on page 16).

For an existing connection:

- If you are editing existing information, modify the fields as needed and click **Save**.

Choosing Profiles

A SAML profile is the message-interchange scenario that you and your federation partner have agreed to use (see “Federation Planning Checklist” on page 16). For SAML 2.0, PingFederate supports all IdP- and SP-initiated Web SSO and SLO profiles as well as the Attribute Query profile (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

The SAML 1.x implementation supports standard IdP-initiated SSO as well as nonstandard SP-initiated SSO.

For information on typical SSO/SLO profile configurations, including illustrations, see the “Profiles” sections in the “Supported Standards” chapter in Getting Started.

![SAML Profile](image)

**Note:** For SAML 1.x, IdP-initiated SSO is assumed and the specifications do not support SLO. The choices on this screen are limited to SP-initiated SSO and User Provisioning.
On this screen, you can choose to enable User Provisioning, when one or more SSO profiles are chosen (see “User Provisioning” on page 22 and “User Provisioning” on page 246).

**Note:** For WS-Federation, the Profiles screen is not presented. However, a different screen, Profile Support, permits the configuration of user provisioning (see “Enabling Express Provisioning for WS-Federation” on page 216).

You can configure profiles individually or all together. PingFederate presents the correct configuration steps to fit your choices. Steps that apply to one SSO or SLO profile often apply to others and are reused automatically across profiles.

**To reach this screen:**
1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Profiles in the steps list.

**To configure profiles:**
1. Select the profile(s) applicable to this connection and click Next.
   - For SAML 2.0 connections, you must select an SSO profile before you can enable SLO or User Provisioning.
2. Complete the associated configuration tasks.
   - Refer to the table below for sections of this manual covering configuration details:

<table>
<thead>
<tr>
<th>For information about:</th>
<th>See this section:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSO/SLO configuration</td>
<td>“Configuring Web SSO” on page 235</td>
</tr>
<tr>
<td>User Provisioning</td>
<td>“User Provisioning” on page 246</td>
</tr>
<tr>
<td>Attribute Query configuration</td>
<td>“Configuring the Attribute Query Profile” on page 253</td>
</tr>
<tr>
<td>Back-channel authentication, digital signing, and other security settings</td>
<td>“Configuring Credentials” on page 256</td>
</tr>
</tbody>
</table>

**Enabling Express Provisioning for WS-Federation**

For WS-Federation connections, the Profile Support screen provides a means of enabling provisioning (see “User Provisioning” on page 22).
Notice that SP-Initiated SSO is pre-selected and cannot be changed; PingFederate supports this standard profile by default. This screen is provided exclusively to allow provisioning to be added to WS-Federation connections.

- When you select User Provisioning, the task is added to the configuration flow (see “User Provisioning” on page 246).

**User-Session Creation**

As an SP, you must specify how you will use information sent from the IdP in Web SSO assertions to create user sessions for enabling access to protected resources at your site. This configuration includes:

- Choosing an identity-mapping method (see “Selecting an Identity-Mapping Method” next).
- Defining the attribute contract you will use with this partner, if any (see “Creating an Attribute Contract” on page 219).
- Configuring instances of one or more adapters (see “Configuring Adapter Mapping and User Lookup” on page 221) and specifying how they are used to fulfill the adapter contract.
Selecting an Identity-Mapping Method

PingFederate allows an SP to use either account linking or account mapping to associate remote users with local accounts for SSO between business partners (see “Identity Mapping” on page 5). At the Identity Mapping step, you choose which method to use with a particular IdP connection. You and your partner may want to decide in advance which option to use (see “Federation Planning Checklist” on page 16).

If your site is using account linking, then establishing an attribute contract is not required. Depending on your partner agreement, however, you may choose to supplement the account link with an attribute contract. In this configuration the account link is used to determine the user's identity, while the additional
attributes might be used for authorization decisions, customized Web pages, and so on, at your site (see “About Attributes” on page 8).

**Important:** If you have previously set up a configuration to use an attribute contract and want to change the configuration to use account linking without additional attributes, then the existing attribute contract will be discarded.

Account linking can be used with either a clear, standard name identifier or an opaque pseudonym.

- If you want to dynamically associate remote users with local accounts using a known attribute to identify a user—for example, a username or email address—then select **Account Mapping**.

  Account mapping uses the value passed in the SAML assertion's `SAML_SUBJECT` and associated user attributes to create an association between a remote user and a local account.

  **Tip:** if you are using PingFederate’s Express Provisioning, choose Account Mapping (see “User Provisioning” on page 246).

- If you want to create a long-term association between a remote user and a local account, then select **Account Linking** on the Identity Mapping screen.

  To set up an attribute contract to use in conjunction with account linking, click the checkbox next to “The assertion includes attributes . . .” after selecting **Account Linking**.

**To reach this screen:**

1. Click a connection name on the Main Menu.
   
   Click **Manage All IdP**, if needed, to see a full list of connections.

2. Click **User-Session Creation** in the steps list.

3. Click **Identity Mapping** in the steps list.

**Creating an Attribute Contract**

An attribute contract is the set of user attributes that you and your partner have agreed will be sent in a SAML assertion for this connection (see “Attribute Contracts” on page 9). You identify these attributes on this screen.

`SAML_SUBJECT` is always sent in a SAML assertion and contains the name identifier of the user requesting SSO. When you select account mapping as the identity mapping technique, the `SAML_SUBJECT` is available to help map the incoming user to a local ID on your system (see “Selecting an Identity-Mapping Method” on page 218).
For **account linking**, the `SAML_SUBJECT` contains an identifier that the SP server uses to make a permanent association between the remote user and a local account. The `SAML_SUBJECT` itself is not available to the SP application and thus does not appear in the Attribute Contract on this screen.

Optionally, you can mask the values of attributes (other than `SAML_SUBJECT`) in the log files that PingFederate writes when it receives assertions (see “Attribute Masking” on page 10).

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click **Manage All IdP**, if needed, to see a full list of connections.

2. Click **User-Session Creation** in the steps list.

3. Click **Attribute Contract** in the steps list.
   
   If this step is not in the list, then you have chosen to use **account linking** and specified that the IdP is not including additional attributes in the assertion (see “Selecting an Identity-Mapping Method” on page 218).

To add an attribute:

1. Enter the attribute name in the text box.
   
   Attribute names are case-sensitive and must correspond to the names configured by your federation partner.

2. Optionally, select the checkbox under **Mask Values in Log**.

3. Click **Add**.

To modify an attribute name or masking status:

1. Click **Edit** under Action for the Attribute name.

2. Edit the name and/or change the masking status, and then click **Update**.
Managing IdP Connections

**Note:** If you change your mind, ensure that you click the **Cancel link** in the Actions column, not the **Cancel button**, which discards any other changes you might have made in the configuration steps.

**To delete an attribute:**

- Click **Delete** for the Attribute Name.

**Configuring Adapter Mapping and User Lookup**

Remote users arriving at your site via an SSO request do so in order to use specific applications or gain access to protected resources. Based on the nature of the business relationship and the agreement with your partner, you may be expected to provide access to these applications. Therefore, integration between your federation SP server and local applications is important.

The PingFederate server for an SP uses integration adapters to identify the user to your applications based on attributes sent in an assertion. The server uses this information to create a local session that enables access to user-requested resources (the “target”) at your site. (See “Integration Kits and Adapters” on page 7.)

Each adapter instance requires a set of attributes into which you map values found in the assertion. You can map additional attributes, as needed, from local data stores, or you can use static or variable text values. An adapter instance will fail to create a local session for the incoming user if it is unable to find values for each of its required attributes.

You must associate at least one adapter instance with an IdP connection. If you have multiple integration requirements—for example, if you are using more than one IdM system or an application not covered by a centralized system—then you should map multiple adapter instances.

**Note:** If you configure only one adapter instance for a connection, the server will use that instance at runtime without checking for any associated URLs (see “Mapping URLs to SP Adapter Instances” on page 199).
To begin mapping an adapter:

- Click **Map New Adapter Instance** and follow the configuration screens (see the following sections for more information).

To begin modifying an existing adapter mapping:

- Click the **Adapter Instance Name** and navigate through the steps to the information you want to change.

Selecting an Adapter Instance

An SP adapter instance is available for use within an IdP connection only after it has been deployed in PingFederate.
To select an adapter instance:

- Choose an adapter instance from the drop-down menu and click Next to continue.

  If the adapter instance you need is not available, click Manage Adapter Instances to define one or more adapter instances you need for this connection.

  Note that an adapter instance can be mapped only once per connection.

**Tip:** Adapter contracts for some adapters can be customized for individual connection requirements (see “Configuring SP Adapters” on page 194).

Selecting an Adapter Data Store

To populate the attributes required by the adapter (the adapter contract), you can use values supplied by SAML assertions from the IdP exclusively, or in addition to values retrieved from local user data stores (see “Managing Data Stores” on page 70).

- If you choose to look up additional values, click the applicable button and then Next. This selection allows you to identify data sources and specify lookup queries in subsequent screens (see “Data Store Setup” next).

  Or:

  If you choose not to look up additional values, click the applicable button (if it is not already selected) and then Next. This selection takes you directly to
a screen where you can map attribute values from the assertion (see “Configuring Adapter Contract Fulfillment” on page 233).

**Tip:** To determine whether you need to look up additional values, compare your attribute contract against your adapter contract (see “Creating an Attribute Contract” on page 219 and “Selecting an Adapter Instance” on page 222). If the adapter requires more information, determine whether your local data stores can supply it. (You can also choose to use text constants or expressions for certain information—see “Configuring Adapter Contract Fulfillment” on page 233.)

---

**Data Store Setup**

For data-store setup information, refer to the sections indicated in the following steps.

**Note:** As you make selections on configuration screens, ensure that you allow enough time for PingFederate to access your data store and populate drop-down lists.

1. See “Selecting a Data Store” on page 224.
2. See the following sections in this manual, depending on the type of data store:

<table>
<thead>
<tr>
<th>Data Store Type</th>
<th>Related Manual Sections</th>
</tr>
</thead>
</table>
| JDBC            | • “Selecting a Database Table and Columns” on page 225  
|                 | • “Configuring a Database Filter (WHERE Clause)” on page 227 |
| LDAP            | • “Configuring an LDAP Directory Search” on page 229  
|                 | • “Configuring an LDAP Filter” on page 231 |
| Custom          | • “Configuring Custom Source Filters” on page 233  
|                 | • “Selecting Custom Source Fields” on page 233 |

3. See “Configuring Adapter Contract Fulfillment” on page 233

**Selecting a Data Store**

This screen allows you to choose a data store from a previously configured list (see “Managing Data Stores” on page 70). Attribute values extracted from this data store will be used in combination with the values from the attribute contract to fulfill the adapter contract for this adapter instance (see “Configuring Adapter Mapping and User Lookup” on page 221).
To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click **Manage All IdP**, if needed, to see a full list of connections.

2. Click **User-Session Creation** in the steps list.

3. Click **Adapter Mapping & User Lookup** in the steps list.

4. Click an adapter name or **Map New Adapter Instance**.

5. Click **Data Store** in the steps list.

   If this step is not present, then you have not chosen to use a data store to supplement assertion attributes (see “Selecting an Adapter Data Store” on page 223).

To choose a Data Store:

▶ Choose an **Active Data Store** and click **Next**.

   A data store configuration must be defined under **System Settings** for use within a connection. If the data store you want is not shown in the drop-down menu, click **Manage Data Stores** to add a new data store (see “Managing Data Stores” on page 70).

Selecting a Database Table and Columns

When you choose to use a database source for attributes, you follow this path through the configuration steps.

On this screen you specify the database column locations that will be retrieved after a lookup query locates the user record. You will specify the user lookup query next (see “Configuring a Database Filter (WHERE Clause)” on page 227).
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schema</td>
<td>Lists the table structure that stores information within a database. Some databases, such as Oracle, require selection of a specific schema for a JDBC query. Other databases, such as MySQL, do not require selection of a schema.</td>
</tr>
<tr>
<td>Table</td>
<td>The name of the table contained in the database. The name is used to construct the SQL query to retrieve data from the data store.</td>
</tr>
<tr>
<td>Add Attribute</td>
<td>Adds the column to be executed in the SQL query to the data store to retrieve the attribute value.</td>
</tr>
<tr>
<td>(Drop-down menu)</td>
<td>The available columns of attribute names for the selected table are displayed. Select the columns that are associated with the desired attributes you would like to return from the JDBC query.</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click User-Session Creation in the steps list.
3. Click Adapter Mapping & User Lookup in the steps list.
4. Click an adapter name or Map New Adapter Instance.
5. Click **Database Tables and Columns** in the steps list.

   If this step is not shown, this connection is not yet configured to use a database to look up attributes. For information about changing this configuration, see “Selecting a Data Store” on page 224.

**To select a database table and columns for queries:**

1. Choose a Schema file (when applicable) from the drop-down list.
2. Choose a Table from the drop-down list.
3. Choose a name under Columns to Return from Select and click Add Column.

   Repeat this step for other columns as needed.

---

**Note:** You do not need to add a column here for it to be used as part of a search key (see “Configuring a Database Filter (WHERE Clause)” next). Add only attributes from which you need actual values to pass in an assertion.

---

**Tip:** To determine which attributes to look up during a query, click **Adapter Contract to Fulfill** to see what information must be collected (see “Selecting an Adapter Instance” on page 222). Then determine what information is coming in from the assertion (see “Creating an Attribute Contract” on page 219). Information not contained in the Attribute Contract may be pulled from the data store look-up query.

---

**Configuring a Database Filter (WHERE Clause)**

On this screen you begin to specify exactly where additional data can be found to complete the attribute contract when you receive an assertion from this IdP (see “Creating an Attribute Contract” on page 126).
Chapter 6
Service Provider Configuration

The JDBC WHERE clause queries your data store to locate a user record. Once the record is located, the configured SELECT statements retrieve the attribute values.

The clause is in the form:
WHERE column1=value1 [AND column2=value2] [OR ...]

The left side of the first variable pair uses a column name in the database table you selected (see “Selecting a Database Table and Columns” on page 225).

The right side generally uses values passed in from the assertion. Possible variables for these, including the correct syntax, are listed under Assertion Values.

You can also apply additional search criteria from your own database, using any other columns from the targeted table.

Tip: Click “View List of ALL columns . . .” to see a list from which to copy and paste.

For general information about WHERE clauses, consult your DBMS documentation.
Example:

userid='\{username\}'

In this example userid is the name of a column in the JDBC data store. On the right side, \{'username\}' returns the value of the username from the assertion.

---

Important: You must use the $() syntax to retrieve the value of the enclosed variable and use single quotation marks around the $() characters.

---

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click User-Session Creation in the steps list.
3. Click Adapter Mapping & User Lookup in the steps list.
4. Click an adapter name or Map New Adapter Instance.
5. Click Database Filter in the steps list.
   - If this step is not shown, this connection is not yet configured to use a database to look up attributes. For information about changing this configuration, see “Selecting a Data Store” on page 224.

To construct the WHERE clause:

1. Enter the statement in the space provided, following the guidelines and example above.
   - The initial WHERE is optional.
2. Ensure the syntax and variable names are correct.
   - When you click Next, you will map attribute values returned from the database into the attribute contract (see “Selecting an Adapter Data Store” on page 223).

Configuring an LDAP Directory Search

When you choose to use an LDAP source for attributes, you follow this path through the configuration steps.

On this screen you begin to specify exactly where additional data can be found to supply to the SP adapter in order to access a resource on your system (see “Integration Kits and Adapters” on page 7).
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base DN</td>
<td>The base distinguished name of the tree structure in which the search begins. This field is optional if records are located at the LDAP root.</td>
</tr>
<tr>
<td>Search Scope</td>
<td>Determines the node depth of the query. Select Subtree, One level or Object.</td>
</tr>
<tr>
<td>Root Object Class</td>
<td>Specifies the object type within the LDAP hierarchy from which attributes will be returned.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The available attribute names for the selected directory structure. Select the names associated with the attributes that you would like to return from the query.</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click User-Session Creation in the steps list.
3. Click Adapter Mapping & User Lookup in the steps list.
4. Click an adapter name or Map New Adapter Instance.
5. Click **LDAP Directory Search** in the steps list.
   
   If this step is not shown, this connection is not yet configured to use LDAP to look up attributes (see “Selecting a Data Store” on page 224).

**To select LDAP attributes:**

1. (Optional) Enter a **Base DN**.
2. Select a **Search Scope**.
3. Select a **Root Object Class**.
4. Under Attributes to return from search, choose an attribute and click **Add Attribute**.
   
   Note that the attribute Subject DN is always returned by default.
5. Repeat the last step for other attributes as needed.
6. (Optional) Change the Search Scope or the Root Object Class if you want attributes from other locations.

**Note:** You do not need to add an attribute here for it to be used in a search filter (see “Configuring an LDAP Filter”). Add only attributes from which you need values to map to the adapter.

**Configuring an LDAP Filter**

The LDAP filter queries the data store to retrieve a user record associated with a particular value (or values) from the assertion. The filter is in the form:

\[ (attribute=${value}) \]

The left-side variable is an attribute from the data store (see “Configuring an LDAP Directory Search” on page 138).
The right side generally uses values passed in from the assertion.

You can also apply additional search criteria from your data store, using any other attributes from the targeted object classes.

**Tip:** Click "View List of Available LDAP Attributes" for a list from which you can copy and paste.

For general information about search filters, consult your LDAP documentation.

**Example:**

\[(UNAME=${username})\]

In this example UNAME is the name of an attribute in the LDAP data store. On the right side, ${username} returns the value of username in the assertion.

**Important:** You must use the ${} syntax to retrieve the value of the enclosed variable.

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>A filter narrows a search to locate requested data by either including or excluding specific records. An LDAP filter includes the attributes in the search and the value or range of values that the search is attempting to match. Searches are conducted by using at least three components: 1) at least one attribute (attribute data type) to search on, 2) a search filter operator that will determine what to match, and 3) the value of the attribute being sought. Searches must have at least one of each of these three components.</td>
</tr>
</tbody>
</table>

**To reach this screen:**

1. Click a connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **User-Session Creation** in the steps list.
3. Click **Adapter Mapping & User Lookup** in the steps list.
4. Click an adapter name or **Map New Adapter Instance**.
5. Click **LDAP Filter** in the steps list.

   If this step is not shown, this connection is not configured to use LDAP to look up attributes (see “Selecting a Data Store” on page 224).
To construct the LDAP filter:

1. Enter the statement in the space provided, following the guidelines and example above.

   **Note:** If you used an anonymous binding to create this LDAP connection, your access might be restricted (see “Configuring an LDAP Connection” on page 76).

2. Ensure the syntax and variable names are correct.
3. Click Next.

Configuring Custom Source Filters

When you choose to use a custom source for attributes, you follow this path through the configuration steps.

On this screen you specify a filter, or lookup query, for your custom data source. This screen display and the syntax of the filter depends on your developer's implementation of the custom source SDK.

Selecting Custom Source Fields

On the Configure Custom Source Fields screen, you can choose from among the fields shown to map to the adapter contract. These choices are supplied by the driver implementation. Select only those needed to fulfill the attribute contract for this partner connection.

Configuring Adapter Contract Fulfillment

The last step in configuring an adapter is to map each attribute required for the adapter contract to a value (see “Selecting an Adapter Data Store” on page 223). These are the values that will be used to create a local session. An SSO operation fails if the SP is unable to fulfill the mapping requirements defined here.

Map attributes from one of these Sources:

- **Account Link**
  
  This source appears only if you have elected to use account linking (see “Selecting an Identity-Mapping Method” on page 218). When you make this selection, the associated Value drop-down list is populated with Local User ID. Normally, you would map this identifier to target an adapter attribute that represents the local user ID.

- **Assertion**
  
  Values are contained in the assertions from this IdP. When you make this selection, the associated Value drop-down list is populated by the attribute contract (see “Creating an Attribute Contract” on page 219).

- **JDBC/LDAP/Custom**
  
  Values are returned from your query. When you make this selection, the Value list is populated by the database columns or LDAP or custom attributes you identified for this data store (see “Selecting a Database Table" on page 220).
Text

The value is what you enter. This can be text only, or you can mix text with references to any of the values from the assertion, using the \$\{attribute\} syntax.

You can also enter values from your data store, when applicable, using this syntax:

\$\{ds.attribute\}

where attribute is any of the data store attributes you have selected.

Tip: Two other variables are also available: \$\{SAML_SUBJECT\} and \$\{TargetResource\}. SAML_SUBJECT is the initiating user (or other entity); TargetResource is a reference to the protected application or other resource for which the user is requesting SSO access (available only if specified in the relevant startSSO.ping query parameter—see “Application Endpoints” on page 289).

There are a variety of reasons why you might hard code a text value. For example, if your Web application provides a consumer service, you might want to supply a particular promotion code for this partner.

Tip: Another selection in the Source drop-down menu, Expressions, may be enabled (see “Using Attribute Mapping Expressions” on page 309). This option provides more complex mapping capabilities—for example, transforming incoming values into different formats. All of the variables available for text entries are also available for expressions.
To reach this screen:
1. Click a connection name on the Main Menu. Click Manage All IdP, if needed, to see a full list of connections.
2. Click User-Session Creation in the steps list.
3. Click Adapter Mapping & User Lookup in the steps list.
4. Click the Adapter Instance Name.
5. Click Adapter Contract Fulfillment in the steps list.

To map attributes:
1. Choose a Source for each Target attribute (see descriptions of each Source type above).
2. Choose (or enter) a Value for each Attribute. All values must be mapped.
3. Click Done.

Configuring Web SSO

The Web SSO screen displays the SSO profile choices you made previously (if you are using SAML—see “Choosing Profiles” on page 215).

For profile configuration you need to know:
- For SP-initiated SSO profiles, the URL(s) of your IdP’s Single Sign-on Service(s).
- For SLO profiles, the URL(s) of your IdP’s Single Logout Service(s)
- When artifact is an allowable inbound binding, the URL of your IdP’s Artifact Resolution Service(s)
Chapter 6
Service Provider Configuration

- The transport configurations (bindings) that you will use to send and receive data for Web SSO/SLO connections
- Digital signature policies and certification requirements to which you and your connection partner have agreed
- XML encryption policies to which you and your connection partner have agreed

The following sections provide more information on requirements for each SAML profile.

Note: For information about individual steps, see the list under “SSO/SLO Profile Configuration Steps” on page 238.

Configuring IdP-Initiated SSO

When PingFederate is operating as an SP, the IdP-initiated SSO profile configuration defines the message-transport mechanisms (bindings) your enterprise has agreed to allow for receiving SAML assertions, plus any digital signature verification requirements for inbound assertions (see “Certificates, SSL, and XML Encryption” on page 11).

For this configuration you need to know:
- The transport binding(s) to which you and your partner have agreed
- The certificate to be used for verifying incoming digital signatures from your IdP (optional for the artifact binding)

When Artifact is an allowable inbound SAML binding, you also need to know the endpoint(s) to your partner's Artifact Resolution Service(s) and the SOAP client authentication mechanism to use: either HTTP Basic, SSL client certificates, a digital signature, or a combination of these mechanisms.

Configuring SP-Initiated SSO

The SP-initiated SSO profile configuration defines the message-transport mechanisms (bindings) and security requirements for sending authentication requests and receiving assertions when your site initiates SSO transactions.

For SAML 1.x, the SP-initiated SSO profile is also known as the “destination-first” profile, which was added as a supported “non-normative” use case after the release of the SAML 2.0 specifications.

For this configuration you will need to know:
- The endpoint URL(s) for your IdP's Single Sign-on Service(s)
- The transport bindings to which you and your partner have agreed (inbound and outbound)
- The certificates you will use to sign outbound authentication requests and to verify incoming digital signatures from your IdP
When Artifact is an allowable inbound SAML binding, you also need to know
the endpoint(s) to your partner's Artifact Resolution Service(s) and the SOAP
client authentication mechanism to use: either HTTP Basic, SSL client
certificates, a digital signature, or a combination of these mechanisms.

Configuring IdP-Initiated SLO

The SAML 2.0 IdP-initiated SLO profile configuration defines the message-
transport mechanisms (bindings) and security requirements that you and your
partner have agreed upon for exchanging SLO requests and responses.

Note: SLO is not supported by the SAML 1.x specifications.

For more information about SLO, see “Single Logout” in the “Supported
Standards” chapter of Getting Started.

For this configuration you need to know:

- The transport bindings that you and your partner have agreed upon to send
  SLO requests and receive responses
- The certificates to be used for signing outgoing messages and for verifying
  incoming digital signatures from your IdP (optional for the artifact binding)
- The URL(s) of your IdP's Single Logout Service(s)
- The URL of your IdP's Artifact Resolution Service(s) (to resolve artifacts
  from the IdP) and SOAP client authentication requirements

Configuring SP-Initiated SLO

The SAML 2.0 SP-initiated profile configuration for SLO defines the message-
transport mechanisms (bindings) and security requirements that you and your
partner have agreed upon for exchanging SAML requests and responses.

Note: SLO is not supported by the SAML 1.x specifications.

For more information about SLO, see “Single Logout” in the “Supported
Standards” chapter of Getting Started.

For this configuration you need to know:

- The transport bindings that you and your partner have agreed upon to send
  SLO requests and receive responses
- The certificates to be used for signing outgoing messages and for verifying
  incoming digital signatures from your IdP (optional for the artifact binding)
- The URL(s) of your IdP's Single Logout Service(s)
- The URL of your IdP's Artifact Resolution Service(s) (to resolve artifacts
  from the IdP) and SOAP client authentication requirements
Chapter 6  
Service Provider Configuration

SSO/SLO Profile Configuration Steps

The following sections provide information about Web SSO and SLO profile configuration steps:

- “Specifying SSO Service URLs (SAML)” on page 238
- “Specifying a Service URL (WS-Federation)” on page 239
- “Specifying SLO Service URLs (SAML 2.0)” on page 240
- “Choosing Allowable SAML Bindings (SAML)” on page 241
- “Setting an Artifact Lifetime (SAML 2.0)” on page 242
- “Specifying Artifact Resolver Locations” on page 242
- “Configuring Signature Policy” on page 244
- “Configuring XML Encryption Policy (SAML 2.0)” on page 245

Important: After modifying Web SSO profiles, you must click **Save** on the Web SSO screen.

Specifying SSO Service URLs (SAML)

At this step for SAML 2.0 connections, you associate bindings to the endpoints where your IdP wants PingFederate to send authentication requests when SSO is initiated at your site.

For SAML 1.x, only one endpoint is allowed and the binding selection is not required.

This configuration applies only to the SP-initiated SSO Profile (see “ Configuring SP-Initiated SSO” on page 236).
### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binding (SAML 2.0)</td>
<td>The transport type agreed upon by you and your partner: Artifact, POST, or Redirect.</td>
</tr>
<tr>
<td>Endpoint URL</td>
<td>The location where your IdP receives SSO messages.</td>
</tr>
</tbody>
</table>

To reach this screen:
1. Click a connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Web SSO** in the steps list.
3. Click **Configure Web SSO**.
4. Click **SSO Service URLs** in the steps list.
   - If this step is not displayed, you have not selected SP-initiated SSO (see “Choosing Profiles” on page 215).

To define an Endpoint URL:
1. If you are using SAML 2.0, select the Binding your partner specifies for the Endpoint.
2. Enter the fully qualified Endpoint URL or a relative path if you have defined a base URL (see “General Information” on page 212).
3. If you are using SAML 2.0, click **Add**.
4. If your partner has additional SSO endpoints established under SAML 2.0, repeat the steps above.

Specifying a Service URL (WS-Federation)
The Service URL is the WS-Federation endpoint of your IdP partner. This endpoint is where you send RST (Request for Security Token) and SLO messages.

Enter the fully qualified URL or a relative path if you have defined a base URL (see “General Information” on page 212).
To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO on the Web SSO screen.
4. Click Service URL in the steps list.

Specifying SLO Service URLs (SAML 2.0)

At this step you associate bindings to the endpoints where your IdP receives logout requests when SLO is initiated at your site and where you send SLO responses when you receive SLO requests from the IdP.

This step applies only for SAML 2.0 connections when you have selected an SLO profile (see “Choosing Profiles” on page 215).

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binding</td>
<td>The transport type agreed upon by you and your partner: Artifact, POST, Redirect, or SOAP.</td>
</tr>
<tr>
<td>Endpoint URL</td>
<td>The location where your IdP receives SLO request messages.</td>
</tr>
<tr>
<td>Response URL</td>
<td>(Optional) The location where the IdP receives logout responses. Use this endpoint when you are part of a chain of session participants.</td>
</tr>
</tbody>
</table>

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click **Web SSO** in the steps list.
3. Click **Configure Web SSO**.
4. Click SLO Service in the steps list.

**To define an Endpoint URL:**
1. Select the Binding your partner specifies for the Endpoint.
2. Enter the fully qualified Endpoint URL or a relative path if you have defined a base URL (see “General Information” on page 212).
3. (Optional) Enter the Response URL or a relative path and click **Add**.
4. If your partner provides additional endpoints for SLO, repeat the steps above.

**Choosing Allowable SAML Bindings (SAML)**

At this step you configure binding(s) that the IdP will use to send SAML assertions or SLO messages (under SAML 2.0) to your PingFederate server.

This configuration applies to all profile types (see “Choosing Profiles” on page 215). You and your partner can agree to standardize on one binding type or select different bindings for different profile scenarios.

```
<table>
<thead>
<tr>
<th>SAML20</th>
<th>Configuring</th>
<th>idp connection</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main</td>
<td>IdP Connection</td>
<td>Web SSO</td>
<td>✓ SSO Service URLs</td>
<td>✓ SLO Service URLs</td>
<td>✓ Allowable SAML Bindings</td>
<td>✓ Artifact Lifetime</td>
</tr>
<tr>
<td></td>
<td>✓ Artifact Resolver Locations</td>
<td>✓ Signature Policy</td>
<td>✓ Encryption Policy</td>
<td>✓ Summary</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- When the IdP sends messages, over what SAML bindings do you want to receive them?

- ✓Artifact
- POST
- Redirect
- ✓SOAP
```

**To reach this screen:**
1. Click a connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Web SSO** in the steps list.
3. Click **Configure Web SSO**.
4. Click **Allowable SAML Bindings** in the steps list.

**To define binding requirements for this connection:**
- Make your selections and click **Next** (or **Done**).
Setting an Artifact Lifetime (SAML 2.0)

When you send an artifact to your IdP's SSO or SLO service, an element in the message indicates how long it should be considered valid.

You can change the default value per your requirements, if needed. Also consider synchronizing clocks between your server and your partner's SAML gateway server. If clocks are not synchronized, you might need to set the artifact lifetime to a higher value.

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Web SSO in the steps list.
3. Click Configure Web SSO.
4. Click Artifact Lifetime in the steps list.

   This step appears only if you have selected the artifact binding for either a Web SSO or SLO Service at the IdP site.

Specifying Artifact Resolver Locations

This endpoint or group of endpoints is where your server will send back-channel requests based on artifacts. The location or locations are also known under SAML specifications as the Artifact Resolution Service. SAML 2.0 provides for multiple, indexed endpoints for the service; SAML 1.x provides for a single endpoint.
Managing IdP Connections

Note that this screen is different for SAML 1.x implementations, for which only one endpoint is allowed.

To reach this screen:

1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.

2. Click Web SSO in the steps list.

3. Click Configure Web SSO.

4. Click Artifact Resolver Locations in the steps list.
   If this step does not appear, you do not have Artifact selected under Allowable SAML Bindings.

For a SAML 2.0 connection:

1. Enter a URL on the Artifact Resolver Locations screen and click Add.
   The URL must be fully qualified (defining protocol, host, and port) unless you have entered a base URL (see “General Information” on page 212).
   Repeat this step if your IdP supports multiple services. The SAML 2.0 specifications permit multiple artifact resolution services through the use of Index numbers, which PingFederate automatically supplies when you add a service. Alternatively, if needed per partner specifications, you may assign these index numbers manually.

   Note: When specifying multiple artifact resolution endpoints, each endpoint must share the same transport protocol. That is, if one endpoint uses HTTP, then all must use HTTP. Similarly, if one endpoint uses HTTPS, then all must use HTTPS.

2. Click Next.
Chapter 6
Service Provider Configuration

For a SAML 1.x connection:

1. Enter the Endpoint on the Artifact Resolution Location screen.
   The URL must be fully qualified (defining transport protocol, host, and port) unless you have entered a base URL (see “General Information” on page 212).

2. (Optional) Enter your partner’s Source ID.
   The Source ID is usually a generated value based on a federation partner’s Connection ID; the SP will correctly generate the Source ID. If that is the case for this partner, then leave this field blank. If your partner uses a Source ID that is not based on their Issuer ID, then enter the Source ID supplied by your IdP partner.

3. Click Next.

Configuring Signature Policy

The Signature Policy screen provides options controlling how digital signatures are used for SSO Internet messaging. The choices made on this screen depend on your partner agreement (see “Digital Signing Policy Coordination” on page 13).

Digital signing is required for SAML Response messages sent from the IdP via POST (or Redirect for SAML 2.0). Optionally, SSO authentication requests from the SP (SP-initiated SSO) may also be signed to enforce security. (This option appears only for SAML 2.0 connections and only if you have enabled SP-initiated SSO using the POST or redirect bindings.)

The assertions inside SAML Responses may be also be signed. When you make this choice, only the assertion portion of the Response is signed, not the complete Response. (This is the only option that appears for SAML 1.x connections.)

To choose one or more enhancement options, select the second button, make your choice(s), and click Next.

Otherwise, select the first option (if not already selected) and click Next.
Configuring XML Encryption Policy (SAML 2.0)

For SAML 2.0 configurations, in addition to using signed assertions to ensure authenticity, you and your partner may also agree to encrypt all or part of an assertion to improve privacy. This feature is commonly used if the assertion might pass through an intermediary (such as a user’s browser) and HTTPS is not used.

If the name identifier (or `SAML_SUBJECT`) of an assertion is encrypted, you and your partner may also want to encrypt the identifier in subsequent single-login messages (if you are using an SLO profile).

Note that “The entire assertion” selection on the Encryption Policy screen includes the `SAML_SUBJECT` and all attributes.

To reach this screen:
1. Click a connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Web SSO** in the steps list.
3. Click **Configure Web SSO** on the Web SSO screen.
4. Click **Encryption Policy** in the steps list.

To define XML encryption:
1. Select Encryption enabled.
2. Choose whether this IdP partner will encrypt the entire assertion, the `SAML_SUBJECT`, one or more other attributes, or some combination.
3. If your partner is encrypting the name-identifier attribute, use the checkboxes near the bottom of the screen to indicate whether you will
encrypt this attribute in outbound SLO messages and/or allow its encryption for inbound messages.

4. Click **Next** or **Done**.

**To disable previously configured XML encryption selections:**

1. Select **None** and then **Done**.
2. Click **Save** on the Web SSO screen.

**Editing and Saving Web SSO Configurations**

On the Summary screen you can review or edit your Web SSO configuration.

---

**Important:** When you finish editing existing profiles, you must click **Done** on the Summary screen and then **Save** on the Web SSO screen. For a new connection, click **Done** and then click **Next** on the Web SSO screen. Save the entire connection on the Activation screen (see “Connection Activation and Summary” on page 264).

---

**To reconfigure saved profiles:**

1. Click the heading over the information you want to change.
2. Click **Done** on the screen containing your change.
   
   If you need to make dependent or other changes, do so and continue by clicking **Done** until you reach the Web SSO screen.
3. Click **Save** on the Web SSO screen.

**User Provisioning**

PingFederate’s Express Provisioning allows SPs to create LDAP user accounts “on the fly” during SSO events, based on attributes received from IdPs (see “User Provisioning” on page 22). An SP can also use the feature to update existing user records.

This configuration task is presented in the administrative console only when User Provisioning is selected as a profile (see “Choosing Profiles” on page 215).
To continue, click Configure User Provisioning.

Choosing an Event Trigger

On the Event Trigger screen, choose whether PingFederate initiates user provisioning only when the user identifier is new or every time your site receives a SAML assertion. In the latter case, an existing user account is always updated with incoming attributes.

Selecting Attribute Sources (SAML 2.0)

For SAML 2.0 connections, the server can be configured to use only assertion attributes for user provisioning or to retrieve more attributes from the IdP in a follow-on Attribute Query transaction (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started). The User Attributes screen
displays the attributes expected in the assertion from this IdP (see “Creating an Attribute Contract” on page 219).

Note: Attribute Query is a SAML 2.0 profile. For SAML 1.x and WS-Federation connections, this screen is not presented; PingFederate uses only attributes from the assertion for user provisioning.

If you and your IdP partner have agreed to use the Attribute Query profile for provisioning, select that option before leaving this screen.

You will configure the Attribute Query profile later in the task flow, if you have not already done so (see “Configuring the Attribute Query Profile” on page 253).

Identifying the User Repository

PingFederate’s provisioning feature currently supports only LDAP user stores. Choose the data store to use on the User Repository screen.
If the correct data store is not shown in the drop-down list, then PingFederate is not yet configured to access the store (see “Managing Data Stores” on page 70).

**Specifying User-Record Location**

After choosing a data store, indicate where in the store PingFederate should write new user records or update existing ones (see “Choosing an Event Trigger” on page 247). Start by specifying where user records are located in your data store.

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base DN</td>
<td>The base distinguished name of the tree structure in which the search begins. Leave this field blank if records are located at the LDAP root.</td>
</tr>
</tbody>
</table>

**Specifying a Unique Identifier**

On the Unique ID screen, create an LDAP filter to identify user accounts to be provisioned (or updated) during SSO events. PingFederate uses this expression in conjunction with the Base DN (see the previous section) to locate existing account records and to add new ones.
The filter is in the form:

\[ \text{attribute} = \$\{\text{value}\} \]

Note that the statement must not be enclosed in parentheses, unlike filters used to retrieve LDAP attributes for adapter mapping (see “Configuring an LDAP Filter” on page 231).

The left-side variable is an attribute in your user data store—click the link near the left corner of the screen to see a list of available attributes. The right side of the filter generally uses one or more attribute values passed in from the assertions (see “Creating an Attribute Contract” on page 219). Variables for these attributes, including the correct syntax, are listed under Assertion Values.

**Identifying Provisioning Attributes**

On the Attributes screen, select the data-store attributes to be provisioned.

**Tip:** Multiple-value IdP attributes are handled automatically: when you map a multi-value assertion attribute to an LDAP attribute, each value is stored separately for the LDAP attribute name. If you need to provide additional values for particular attributes, add the same attribute name to this list multiple times. You can then map the additional values on the Attribute Fulfillment screen (see the next section).
Managing IdP Connections

To select attributes:

1. Choose a Root Object Class and an Attribute from the drop-down lists and click **Add Attribute**.
   
   Repeat this step for the same attribute if needed (see “Tip” above).

   **Important:** For the Sun Directory Server or Active Directory, the attribute `objectClass` must be among attributes added—select `<Show All Attributes>` under Root Object Class to locate and add this attribute.

2. Repeat the previous step for each attribute requiring provisioning.

Mapping Attributes to User Accounts

The Attribute Fulfillment screen provides a means of mapping the values of incoming attributes to the local account attributes selected on the previous screen. You can also provide values of your own for any attributes—either as hard-coded text or derived values based on assertion attributes.
Map attributes from one of these Sources:

- **Assertion**
  Values are contained in the assertions from this IdP. When you make this selection, the associated Value drop-down list is populated by the attribute contract (see “Creating an Attribute Contract” on page 219).

- **Attribute Query**
  This choice appears only if you have chosen to use the Attribute Query profile for provisioning (see “Selecting Attribute Sources (SAML 2.0)” on page 247).
  
  To map an attribute-query value, use this syntax:
  
  ```
  ${query_attribute}
  ```

  You can also combine attribute-query values with references to attributes in the attribute contract. For example:
  
  ```
  ${query_attribute}+${attribute}
  ```

  References to attributes not contained in the attribute contract result in an Attribute Query back to the IdP partner.

- **Text**
  The value is what you enter. This can be text only, or you can mix text with references to any of the values from the assertion, using the ${attribute} syntax.

  **Tip:** Another selection in the Source drop-down menu, Expressions, may be enabled (see “Using Attribute Mapping Expressions” on page 309). This option provides more complex mapping capabilities—for example, transforming incoming values into different formats. All of the variables available for text entries are also available for expressions.

**To map attributes:**

1. Choose a Source for each Target attribute (see descriptions of each Source type above).

   **Tip:** Choose Text as the Source for the objectClass attribute.

2. Choose (or enter) a Value for each Attribute.

   All values must be mapped.

   **Tip:** For Active Directory, enter user in the text box for objectClass. For the Sun Directory Server, enter inetOrgPerson.

3. Click Done.
Error Handling

If user provisioning fails for any reason during SSO events, you can choose to stop the SSO or continue the process by passing assertion attributes on to your application (via the SP adapter configuration—see “Configuring Adapter Mapping and User Lookup” on page 221).

When SSO is aborted, the user is redirected to an error page, and the failure is written to the log and registered in the administrative console.

Using the Provisioning Summary Screen

The Summary screen provides an overview of your provisioning configuration.

► When you are finished with a new configuration, click Done and then Save on the User Provisioning screen.

To change the configuration:

1. Click the heading over the information you want to change.
2. Click Done on the screen containing your change.
   
   If you need to make additional changes, do so and continue by clicking Done until you reach the User Provisioning screen.
3. Click Save on the User Provisioning screen.

Configuring the Attribute Query Profile

At the Attribute Query step you configure your connection to request user attributes from your partner IdP, if you have chosen this profile (see “Choosing Profiles” on page 215). Attribute queries are not dependent on single sign-on but may be used independently or in conjunction with Web SSO or provisioning to provide flexibility in how a user authenticates with SP applications (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).
Setting the Attribute Authority Service URL

Attribute Authority is the term used to refer to an IdP that provides user attributes to an Attribute Requester (your SP site). The Attribute Authority Service URL corresponds to the endpoint location where Attribute Query requests are received by your IdP partner (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

To configure the URL:

- Enter the fully qualified URL or a relative path if you have defined a base URL (see “General Information” on page 212).

Mapping Attribute Names

If the application at your site uses different names for user attributes than the names defined by the Attribute Authority, then you need to map them on this screen. When the SP receives a request from a local application to send an Attribute Query to this Attribute Authority partner, the requested user attributes are replaced with the names mapped here.

This information must be predetermined in your agreement with this connection partner.

To map attributes:

1. Enter the Local Name and Remote Name of an attribute and click Add.
   Repeat this step for all attributes requiring mapping.
2. Click Next.

To edit a mapping:
1. Click Edit under Action for the mapping.
2. Make your change(s) and click Update.

Note: If you change your mind, ensure that you click the Cancel link in the Actions column, not the Cancel button, which discards any other changes you might have made in this configuration.

3. Click Done and then Save on the Attribute Query screen.

Specifying Security Policy

This screen allows you to specify the digital signing and encryption policy to which you and your partner have agreed. These selections will trigger requirements for setting up Credentials (see “Configuring Credentials” on page 256).

This screen also allows you to mask incoming attribute values in log files (see “Attribute Masking” on page 10). When you enable this selection, all user attributes returned from this IdP are masked.

To configure attribute-query security policy for this partner:
- Check or clear the check boxes and click Next or Done.

Editing and Saving Attribute Query Configurations

On the Summary screen you can review the Attribute Query configuration.

To reconfigure saved profiles:
1. Click the heading over the information you want to change.
2. Click **Done** on the screen containing your change.
   
   If you need to make additional changes, do so and continue by clicking **Done** until you reach the Attribute Query screen.

3. Click **Save** on the Attribute Query screen.

## Configuring Credentials

The Credentials screen presents a list of possible security requirements you might need, depending on the federation protocol you are using and the choices you have made.

Your SAML Web SSO or Attribute Query configuration may involve any or all of the following:

- Configuring Back-Channel Authentication
- Configuring Digital Signature Settings
- Selecting Signature Verification Certificates
- Selecting an Encryption Certificate
- Selecting a Decryption Key

To configure or modify credentials, click **Configure Credentials**.

### Configuring Back-Channel Authentication

When you configure a profile for the inbound artifact binding or the outbound SOAP binding, you must specify back-channel authentication information for sending SOAP messages or artifact resolution requests to your partner IdP.

Similarly, if you send artifacts or SOAP messages to your partner IdP, then you must configure SOAP authentication requirements for receiving SOAP responses or artifact resolution requests from your partner.
Managing IdP Connections

This step also applies to attribute-request configurations, since this profile always uses the SOAP back channel (see “Choosing Profiles” on page 215).

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Credentials in the steps list.
3. Click Configure Credentials.

If the Back-Channel Authentication step is not shown, then it is not applicable to your configuration—you are not using the Attribute Query profile and have not configured any profiles to use the artifact or SOAP bindings.

To configure back-channel authentication requirements for sending SOAP messages:
1. On the Back-Channel Configuration screen, click the Configure link to the right of the list of messages to be sent to your partner.

Note: A yellow triangle next to a listing indicates that you have not completely configured back-channel authentication requirements.
2. Make one or more selections on the Outbound SOAP Authentication Type screen:

- **Basic** — you will enter SOAP Basic credentials on a later screen.
- **SSL Client Certificate** — you will specify the certificate on a later screen.

  This option is enabled only if you have specified an endpoint that uses SSL.
- **Use Digital Signatures . . .** — you will sign the message.

  You will be asked to select a signing certificate on a later screen.

For SAML 2.0, these options may be used in any combination or independently. For SAML 1.x, you must use either Basic or SSL authentication; digital signing may be added to ensure message integrity.

By default, PingFederate validates your partner's SSL server certificate—verifying that the certificate chain is rooted by a trusted Certificate Authority and that the hostname matches the certificate's Common Name. Clear the associated checkbox if you do not want this validation to occur.

3. (Optional) On the Outbound SOAP Authentication Type screen, select the checkbox requiring a valid certificate chain for your partner's SSL certificate.

Make this selection only if you and your partner have agreed that the chain of authority is required for SSL federation transactions.

4. Click **Next**.

5. If you chose Basic at **Step 2**, enter the SOAP Username and Password to use for this partner under Basic SOAP Authentication.

You must obtain these credentials from your partner.

6. If you are using an SSL certificate, select the certificate under SSL Authentication Certificate and click **Next**.

If you have not yet created or imported the client SSL certificate you need into PingFederate, click **Manage Certificates** (see “SSL Client Keys & Certificates” on page 92). You will need to export the certificate (only) and send it your partner.

7. On the Summary screen, click **Done**.

**To configure back-channel authentication requirements for receiving SOAP messages:**

1. On the Back-Channel Configuration screen, click the **Configure** link to the right of the list of messages to be received from your partner.

2. Select one or more options on the Inbound SOAP Authentication Type screen:

- **Basic** — Enter the logon username and password your partner will use on the next screen.
- **SSL Certificate** — Specify certificate verification information on a later screen.
• Use Digital Signatures . . . — Incoming messages must be signed.

You will be asked to select a signature verification certificate on a later screen.

For SAML 2.0, these options may be used in any combination or independently. For SAML 1.x, you must use either Basic or SSL authentication; digital signing may be added to ensure message integrity.

3. Click Next.

4. If you chose Basic at Step 2, enter the SOAP Username and Password under Basic SOAP Authentication.

- Important: If you are configuring more than one connection that uses the artifact or SOAP profile, you must ensure that the Username is unique for each connection.

5. If you are using an SSL certificate, select Anchored or Unanchored under Certificate Verification Method.

- Anchored — The certificate must be signed by a trusted Certificate Authority, and the CA’s certificate must be imported into the PingFederate Trusted CA store (see “Trusted CAs” on page 87).

- Unanchored — The certificate is self-signed or you wish to trust a specified certificate.

- Note: When anchored certificates are used between partners, certificates may be changed without sending the update to your partner. If the certificate is unanchored, any changes must be promulgated.

6. Click Next.

7. If you chose anchored SSL certificate verification at Step 5, enter the Subject DN and click Next.

- Tip: If you have not yet defined the certificate in PingFederate or you do not know the DN, return to the previous screen and check Unanchored. Then click Next and click Manage Certificates on the SSL Verification Certificate screen to import the certificate, if needed, or to view its DN.

8. If you chose unanchored SSL certificate verification at Step 5, select the certificate you will use to validate the SSL connection.

     If you have not yet imported the certificate into PingFederate, click Manage Certificates.

9. Click Next.

10. On the Summary screen, click Done.
Configuring Digital Signature Settings

This step defines the private key you will use to sign SSO authentication or attribute requests (optionally) or SAML 2.0 SLO messages for this IdP. In addition, the step allows you to include “Key Info” with the XML message if you and your partner have agreed to this option.

Digital signing applies to SP-initiated SSO under SAML 2.0, when specified by your partner agreement, and to either SLO profile (see “Choosing Profiles” on page 215) using the POST or redirect bindings. The step also applies if you are configuring an Attribute Query profile and have specified that you will sign attribute requests (see “Specifying Security Policy” on page 255).

The step is not required for SAML 1.x IdP connections.

To reach this screen:

1. Click a connection name on the Main Menu.
   
   Click Manage All IdP, if needed, to see a full list of connections.

2. Click Credentials in the steps list.

3. Click Configure Credentials.

4. Click Digital Signature Settings in the steps list.

   If this step does not appear, then your configuration does not require digital signatures. You do not have SLO configured using the POST or redirect bindings, and you have not elected to sign either authentication or attribute requests (see “Configuring Signature Policy” on page 244 and “Specifying Security Policy” on page 255).

To specify a certificate:

1. Select the certificate from the drop-down list.

   If you have not yet created or imported your certificate into PingFederate, click Manage Certificates (see “Digital Signing and Decryption Keys & Certificates” on page 94).

2. (Optional) If you have agreed to send your public key with the SAML message, click the checkbox to implement this requirement.
Selecting Signature Verification Certificates

Under SAML 2.0 specifications, when your site receives any SAML 2.0 messages via the POST or Redirect bindings, the messages must be digitally signed. Signing is also always required for the SAML 1.x POST binding and for WS-Federation assertions.

Depending on your agreement with this IdP, SSO assertions, SAML 2.0 artifacts, or SOAP messages might also require signatures.

Whenever signatures are required, you must import your partner’s public key certificate into the PingFederate store for signature verification.

**Tip:** To prevent any interruption of service due to an expired certificate, you can ask your partner for a new certificate in advance and use it in the Secondary certificate field. The PingFederate server will use the primary certificate until it expires and then try the secondary.

**To reach this screen:**

1. Click a connection name on the Main Menu.
   
   Click **Manage All IdP**, if needed, to see a full list of connections.

2. Click **Credentials** in the steps list.

3. Click **Configure Credentials**.

4. Click **Signature Verification Certificate** in the steps list.

   If this step does not appear for SAML 2.0, then your configuration does not require a verification certificate. You are not using SLO POST or redirect bindings; only the artifact or SOAP bindings with SSL/TLS endpoints are configured under Allowable SAML Bindings, and signed assertions are not required (see “Choosing Allowable SAML Bindings (SAML)” on page 241 and “Configuring Signature Policy” on page 244).
To specify a certificate:
1. Select the certificate from the drop-down list.
   If you have not yet imported the certificate into PingFederate, click Manage Certificates.
2. Optionally, select a Secondary certificate for backup.
   Use this field if your partner has sent you a new certificate to replace one that is ready to expire. The server will automatically verify against the secondary certificate when the primary one expires.

Selecting an Encryption Certificate

If SAML_SUBJECT is encrypted, either by itself or as part of a whole assertion, then all references to this name identifier in SAML 2.0 SLO requests from your site may also be encrypted (if the connection uses SP-initiated SLO). For more information, see “Configuring XML Encryption Policy (SAML 2.0)” on page 245.

To enable this XML encryption, you must identify an encryption certificate for this partner.

You must also choose a certificate if encryption of the Name Identifier is required for an Attribute Request profile (see “Specifying Security Policy” on page 255).

To reach this screen:
1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Credentials in the steps list.
3. Click Configure Credentials.
4. Click **Select XML Encryption Certificate** in the steps list.

If this step is not present, then you have either not configured this connection to use the SP-initiated SLO profile (see “Choosing Profiles” on page 215) or you have chosen not to encrypt the assertion or the SAML_SUBJECT (see “Configuring XML Encryption Policy (SAML 2.0)” on page 245).

**To identify the encryption certificate:**

1. (Optional) Change the default settings under Block Encryption Algorithm and/or Key Transport Algorithm.

   Due to import restrictions, the standard JRE distribution supports strong but not unlimited encryption. To use the strongest AES encryption, when permissible, download and install the appropriate version of “Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files” from the Sun download Web site (http://java.sun.com/javase/downloads).

   For more information about XML block encryption and key transport algorithms, see the “XML Encryption Syntax and ProcessingW3C Recommendation” (http://www.w3.org/TR/xmlenc-core).

2. From the drop-down list, select the applicable certificate and click **Next**.

   If the certificate is not in the list, click **Manage Certificates** to import it.

   **Note:** If you have already imported a signature verification certificate for this partner, you can reuse it for XML decryption as long as it is an RSA certificate.

**Selecting a Decryption Key**

As part of XML encryption, you must identify a signing certificate and key for PingFederate to use to decrypt incoming assertions or assertion elements (see “Configuring XML Encryption Policy (SAML 2.0)” on page 245).

To reach this screen:

1. Click a connection name on the Main Menu.

   Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Credentials** in the steps list.

3. Click **Configure Credentials**.

4. Click **Select XML Decryption Key**.

   If this step is not present, you have not chosen to require encryption of all or part of the SAML assertion (see “Configuring XML Encryption Policy (SAML 2.0)” on page 245).

**To identify the decryption key:**

- From the drop-down list, select the applicable certificate and click **Next**.

  If the certificate is not in the list, click **Manage Certificates** to import it (see “Digital Signing and Decryption Keys & Certificates” on page 94).

**Note:** If you have imported a certificate for this partner to use for digital signing, you can reuse it for XML decryption as long as it is an RSA certificate.

**Editing and Saving Credential Configurations**

From the **Summary** screen you can review or edit your credentials configuration.

**Important:** When you finish editing existing settings, you must click **Done** on the **Summary** screen and then **Save** on the **Credentials** screen. For a new connection, click **Done** and then click **Next** on the **Credentials** screen. Save the entire connection on the **Activation** screen (see “Connection Activation and Summary” next).

**Connection Activation and Summary**

When you finish setting up a connection, you may choose to activate it immediately. No messages are actually sent or received until your partner’s federation gateway is also established and a user initiates an SSO or SLO event.

**Important:** Regardless of whether you choose to activate a new connection now or later, you must click **Save** on the **Summary** screen for a new connection if you want to keep the configuration.
You can deactivate a connection at any time (for maintenance, for example). When a connection is inactive, all SSO or SLO transactions to or from this partner are disabled.

**Tip:** The SSO Application Endpoint near the top of the Summary screen is an example URL that webmasters or Web application developers at your site might use to invoke SSO for the connection. For details about SSO and other server endpoints, including optional query parameters, see “Application Endpoints” on page 289.

**To change a Connection Status:**
- Select either Active or Inactive and then click **Save**.

**To modify a connection setting:**
1. If you know which step needs to be modified, click its link in the steps list.
   If you do not know where to change the setting, locate the currently configured data under one of the summary headings and then click the subheading above the data.
2. Change the information on the step screen and click **Save**, if available.
   If **Save** is not available, you are in the middle of a task (see “About Tasks and Steps” in the “Console Navigation” chapter of *Getting Started*); click **Next** or **Done** until you reach a screen containing a **Save** button. Then click **Save** and continue as needed until you return to the Main Menu.
   If your modification requires related configuration changes, PingFederate provides error messages indicating the necessary steps and then guides you to the related screens (unless you click **Cancel**).

**Important:** Be sure to click **Save** whenever that button appears, if you want to keep your changes.

### Configuring IdP Auto-Connect

When your IdP partner is also using PingFederate 5 or higher (or is otherwise able to provide interoperable SAML 2.0 metadata via HTTP on demand), you may choose to use Auto-Connect for that partner (see “Using Auto-Connect” on page 19). This configuration can be shared among an unlimited number of SAML 2.0 partners.

**Note:** You enable the SAML 2.0 Auto-Connect profile under System Settings (see “Choosing Roles and Protocols” on page 63).
Once Auto-Connect is enabled on your PingFederate server, you complete the configuration from the Main Menu under My SP Configuration. This configuration entails:

- Setting up a common connection for all Auto-Connect partners
- Establishing a list of IdP partner domains authorized to use the connection

**Configuring the Initial Setup**

The basic configuration for IdP Auto-Connect requires only:

- Choosing a signing certificate for authentication requests and other SAML messages
- Configuring user-session creation information

All other partner-connection specifications are handled automatically at runtime.

**Choosing a Signing Certificate**

For Auto-Connect runtime processing, authentication requests and SLO messages must be signed, since they are sent over either the POST or redirect bindings (see “SAML 2.0 Profiles” in the “Supported Standards” chapter of Getting Started).

![Image](image.png)

> **Note:** The signing certificate is embedded in your server’s Auto-Connect metadata (see “Using Auto-Connect” on page 19); there is no need to exchange certificates with your partners.

You can use the same certificate used for signing metadata (see “Configuring Auto-Connect Metadata Signing” on page 68). If you use a different certificate, ensure that it meets Auto-Connect validation requirements (see “Auto-Connect Security Model” on page 21).

**Configuring User-Session Creation**

Configuring user-session creation for Auto-Connect is similar to configuring the same settings for regular partner connections.
Click Configure User-Session Creation to continue.

For configuration information, refer to sections under “User-Session Creation” on page 217.

Note: Attributes sent from the IdP via Auto-Connect are passed to your applications, regardless of whether they are listed in the attribute contract (see “Creating an Attribute Contract” on page 219).

Connection Activation and Summary

When you finish configuring your IdP Auto-Connect initial setup, you may choose to activate the common connection immediately on the Activation & Summary screen. (No runtime processing occurs until your partner's Auto-Connect gateway is also established and a user initiates an SSO or SLO event.)

Important: Regardless of whether you choose to activate a newly configured connection now or later, you must click Save on the Activation & Summary screen if you want to keep the configuration.

You can deactivate the connection at any time (for maintenance, for example). While a connection is inactive, all SSO or SLO transactions to or from Auto-Connect partners are disabled.

To change a Connection Status:

Select Active or Inactive and then click Save.
To modify a setting:

1. Locate the currently configured setting under one of the summary headings and then click the subheading above the data.

**Note:** Changes made to Auto-Connect settings will be out of sync, temporarily, with metadata caches that any currently active partners might be using. If your connection is in production, you might wish to lower your server’s metadata lifetime in advance of making configuration changes (see “Configuring Auto-Connect Metadata Lifetime” on page 69).

2. Change the information and click **Save**, if available.

   If **Save** is not available, additional, dependent changes are required; click **Next** or **Done** until you reach a screen containing a **Save** button. Then click **Save** and continue as needed until you return to the Main Menu.

### Specifying Allowed IdP Domains

This screen provides PingFederate with a list of trusted domain names of your Auto-Connect partners.

Normally, when PingFederate receives an SSO request from a Web application at your site (see “/sp/startSSO.ping” on page 292), the runtime engine completes the connection automatically using metadata obtained from a standard, public location—http://saml.<domain_name>. (See “Using Auto-Connect” on page 19.) Alternatively, if an Auto-Connect partner elects not to use the standard location, you can supply the applicable URL.

**To add a domain:**

- Enter a Domain Name and click **Add**.

**To specify a URL for metadata retrieval:**

1. Click **Advanced View**.

2. Enter the Domain Name if you have not already done so.
3. Enter the Metadata Service URL.
   This entry must be obtained from your Auto-Connect partner.
4. Click **Add**.

   **Note:** Once you have added the URL, you cannot return to the **Basic View** unless you first remove the URL value using the procedure below.

**To edit an entry:**
1. Click **Edit** under Action for the entry.
2. Make your change and click **Update**.

**To delete an entry:**
1. Click **Delete** under Action for the entry.
OpenToken Adapter Configuration

In order to transfer identity and other user information between the PingFederate server and an end application, the product architecture allows for custom adapters to be deployed with the server (see “Integration Kits and Adapters” on page 7).

PingFederate ships with a deployed OpenToken Adapter, which uses a secure token format (OpenToken) to transfer user attributes between an application and the PingFederate server. On the IdP side, the OpenToken Adapter allows the PingFederate server to receive a user’s identity from the IdP application. On the SP side, the OpenToken Adapter can be used to transfer user-identity information to the target SP application.

Specialized application integration kits are available from www.pingidentity.com. Many kits leverage the OpenToken Adapter to integrate applications with the PingFederate server. The agent portions of the integration kits reside with the application and use the OpenToken to communicate with the OpenToken Adapter.

**Note:** To integrate applications for use with the OpenToken Adapter, download an integration kit for PingFederate from www.pingidentity.com and follow instructions for installing and using Agent Toolkits in the accompanying documentation. Follow the configuration instructions in this appendix to set up the OpenToken Adapter to use with your applications.
Appendix A
OpenToken Adapter Configuration

The following figure shows a basic IdP-initiated SSO scenario using PingFederate with the Java Integration Kit on both sides of an identity federation.

Processing Steps
1. A user initiates an SSO transaction.
2. The IdP application inserts attributes into the Agent Toolkit for Java, which encrypts the data internally and generates an OpenToken. Attributes are encrypted and decrypted using the Java Cryptography Extension (JCE). For more information, see http://java.sun.com/products/jce.
3. A request containing the OpenToken is redirected to the PingFederate IdP server.
4. The server invokes the OpenToken IdP Adapter, which retrieves the OpenToken, decrypts, parses, and passes it to the PingFederate IdP server. The PingFederate IdP server then generates a Security Assertion Markup Language (SAML) assertion.
5. The SAML assertion is sent to the SP site.
6. The PingFederate SP server parses the SAML assertion and passes the user attributes to the OpenToken SP Adapter. The Adapter encrypts the data internally and generates an OpenToken.
7. A request containing the OpenToken is redirected to the SP application.
8. The Agent Toolkit for Java decrypts and parses the OpenToken and makes the attributes available to the SP Application.
Configuring the IdP OpenToken Adapter

1. If you have not already done so, log on to the PingFederate administrative console and click **Adapters** under My IdP Configuration on the Main Menu.

2. On the Manage Adapter Instances screen, click **Create New Adapter Instance**.

3. On the Adapter Type screen, enter an Adapter Instance Name and Adapter Instance Id, select OpenToken Adapter 2.3 (or higher) as the Adapter Type, and click **Next**.
   
The Adapter Instance Id may not contain spaces or underscores.

4. On the IdP Adapter screen, enter the values as described for the adapter configuration.
   
   These values are dependent on your developer's implementation.
Appendix A
OpenToken Adapter Configuration

5. (Optional) Click **Show Advanced Fields** to reconfigure default settings for the OpenToken, as needed. Refer to the on-screen field descriptions for more information.

6. Click **Next**.

7. On the Adapter Actions screen, click **Download** under Action Invocation Link.

8. On the next screen, click **Export** and save the properties file. The values in the resulting file, `agent-config.txt`, represents the console configuration and are used by the IdP application. Refer to your respective Integration Kit User Guide for more information.

9. (Optional) On the Extended Adapter Contract screen, you can configure additional attributes for the adapter (see “Extending an Adapter Contract” on page 107).
10. Click **Next**.

11. On the **Adapter Attributes** screen, select the **subject** checkbox under **Pseudonym** (optionally, select other attributes, if you added any at Step 9).

This selection is used if any of your SP partners will make use of **pseudonyms** for **account linking** (see “Account Linking” on page 6).

**Note:** A selection is required regardless of whether you will use pseudonyms for account linking. This allows account linking to be used later without having to delete and reconfigure the adapter. Ensure that you choose at least one attribute that is unique for each user (for example, email) to prevent the same pseudonym from being assigned to multiple users.

You can also choose to mask the values of any or all attributes that PingFederate logs from the adapter at runtime (see “Attribute Masking” on page 10).

12. Click **Next**.

13. On the **Summary** screen, review the configuration and click **Done**.

You can also click any heading to go back and change information.
Appendix A
OpenToken Adapter Configuration

14. On the Manage Adapter Instances screen, click Save.

**Important:** You must click Save if you wish to retain the adapter configuration.

### Configuring the SP OpenToken Adapter

1. If you have not already done so, log on to the PingFederate administrative console and click Adapters under My SP Configuration on the Main Menu.

2. On the Manage Adapter Instances screen, click Create New Adapter Instance.

3. Enter an Adapter Instance Name and Adapter Instance Id, select OpenToken Adapter 2.3 (or higher) as the Adapter Type, and click Next. The Adapter Instance Id may not contain spaces or underscores.

4. Enter values for the adapter configuration on the SP Adapter Instance screen.

   These values are dependent on your developer's implementation.
5. (Optional) Click **Show Advanced Fields** to reconfigure default settings for the OpenToken, as needed. Refer to the on-screen descriptions for more information.

6. Click **Next**.

7. On the Adapter Actions screen, click **Download** under Action Invocation Link.

8. On the next screen, click **Export** and save the properties file. The values in the resulting file, agent-config.txt, are set by the console configuration and used by the SP application. Refer to your respective Integration Kit User Guide for more information.

9. Click **Next**.

10. (Optional) On the Extended Adapter Contract screen, you can configure additional attributes for the adapter (see “Extending an Adapter Contract” on page 107).

11. Click **Next**.

12. On the Summary screen, review the configuration and click **Done**. You can also click any heading to go back and change information.
13. On the Manage Adapter Instances screen, click **Save**.

**Important:** You must click **Save** if you wish to retain the adapter configuration.

**Note:** If this is the second instance of an OpenToken Adapter configuration, then you must first click **Next** and map target URLs to adapter instances (see “Mapping URLs to SP Adapter Instances” on page 199).
Initial user authentication is normally handled outside of the PingFederate server using an application or IdM system logon module. PingFederate’s adapter and application agents are typically used to integrate with these local authentication mechanisms (see “Integration Kits and Adapters” on page 7).

PingFederate packages an LDAP Authentication Service Adapter (“LDAP Adapter”) and logon form that can authenticate users directly against an LDAP data store. This adapter may be used if your organization does not have a centralized local authentication service and your user stores are maintained by LDAP servers.

On the IdP side, when the PingFederate IdP server receives an authentication request for SP-initiated SSO or the user clicks a link for IdP-initiated SSO, the IdP server invokes the LDAP Adapter and prompts the user for local IdP credentials. The credentials are then compared against the LDAP server and, if validated, a SAML assertion is generated.

On the SP side, local user logon is needed only for account linking. In this federation scenario, the IdP generates a name identifier (which may be a pseudonym) that must be associated with a local user ID used at the SP (see “Account Linking” on page 6).

PingFederate and the LDAP SP adapter handle account linking in the following way:

1. The adapter prompts the user for local SP credentials and validates the credentials against the data store.
2. The adapter passes the user ID to PingFederate to save in an embedded account-linking data store. (You can use the SDK to extend account linking to an external data store.)
3. The LDAP SP adapter then uses the PingFederate Java, .NET, or PHP Integration Kit to transfer user attributes to the SP application (see “OpenToken Adapter Configuration” on page 271).

**Note:** Application-integration kits for Java, .NET, and PHP are available separately from Ping Identity at www.pingidentity.com. To integrate SP applications for the LDAP Adapter, unzip the respective integration kit and follow instructions for installing and using the Agent Toolkits in the accompanying documentation. Then follow the configuration instructions in this appendix to set up the LDAP Adapter to use with your application(s).

The SP application integration consists of two parts. The first is configuration of the adapter, which runs on the PingFederate server and is the subject of this appendix. The second part is an Agent Toolkit, which resides with the application server.

The following figure shows a basic SP-initiated SSO scenario with PingFederate servers using the LDAP Adapter, which is integrated on both sides of the identity federation.

### Processing Steps

1. The user initiates an SSO transaction from an external SP application.
2. The external SP application starts the SSO process through the federation SP server.
3. The request is sent to the federation IdP server.
4. The LDAP IdP adapter authenticates the user against an LDAP server and passes the authentication to the federation IdP server.
5. The federation IdP server generates a SAML assertion and the request is redirected to the SP site.
6. The federation SP server parses the SAML assertion and passes the user attributes to the LDAP SP adapter. The LDAP SP adapter authenticates the user against an LDAP server using account linking, encrypts the data internally, and generates an OpenToken.

7. A request containing an OpenToken is redirected to the SP application.

8. The SP Agent Toolkit decrypts and parses the OpenToken and makes the attributes available to the SP application.

Configuring the IdP LDAP Adapter

1. If you have not already done so, establish a connection between PingFederate and your LDAP server (see “Configuring an LDAP Connection” on page 76).

2. Click **IdP Adapters** on the Main Menu screen.

3. On the Manage Adapter Instances screen, click **Create New Adapter Instance**.

4. On the Adapter Type screen, enter an Adapter Instance Name and Adapter Instance Id, select LDAP Authentication Service 2.0 as the Adapter Type, and click **Next**.

   The Adapter Instance Id may not contain spaces or underscores.

5. On the IdP Adapter screen, enter the values for adapter configuration described below.

   **Note:** If you do not know the values to enter at this time, select your LDAP server and enter placeholders (in any format) for the rest of the entry fields. You can return to this screen to enter the correct values at any time (see “Configuring IdP Adapters” on page 104). Click **Manage Data Stores** if you have not established a connection to your LDAP server.
## LDAP Adapter Configuration

Complete the configuration necessary to look up user security contexts in your environment. This configuration was designed into the adapter for use at your site.

### LDAP Authentication Service 2.0

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDAP Datastore</td>
<td>-- SelectOne --</td>
<td>Select the LDAP Datastore.</td>
</tr>
<tr>
<td>Search Base</td>
<td></td>
<td>The location in the directory from which the LDAP search begins.</td>
</tr>
<tr>
<td>Search Filter</td>
<td></td>
<td>You may use ${\text{username}}$ and ${\text{domain}}$ to indicate user name and user domain, respectively.</td>
</tr>
<tr>
<td>Realm</td>
<td></td>
<td>Authentication Realm: a name associated with the protected area.</td>
</tr>
</tbody>
</table>

### Property Description

- **LDAP Datastore**: The LDAP Data store configured in PingFederate.
- **Search Base**: The location in the LDAP directory server from which the search begins.
- **Search Filter**: Query used to produce the desired set of matching records.
- **Realm**: The name of a protected area. The value of this field is sent as a part of the HTTP basic authentication request. It appears in the dialog box that prompts the user for a username and password.
6. (Optional) Click **Show Advanced Fields** and change parameters as needed.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope of Search</td>
<td>The level of search to be performed in the search base. One level indicates a search of objects immediately subordinate to the base object, not including the base object itself. Subtree indicates a search of the base object and the entire subtree within the base object distinguished name.</td>
</tr>
<tr>
<td>Connection Pooling</td>
<td>A type of connection sharing supported by the LDAP server, which maintains a pool of (possibly) previously used connections and assigns them as needed.</td>
</tr>
<tr>
<td>Operational Mode</td>
<td>The method of interaction between the adapter and user agent. In HTTP Basic Authentication mode, the adapter interacts with the user via HTTP basic authentication. In HTML Form Authentication mode, the adapter uses an HTML form.</td>
</tr>
<tr>
<td>Challenge Retries</td>
<td>The number of attempts allowed for password authentication.</td>
</tr>
</tbody>
</table>

7. Click **Next**.

8. On the Adapter Attributes screen, select the subject checkbox under **Pseudonym** (and, optionally, other attributes, if available).
This selection is used if any of your SP partners will make use of pseudonyms for account linking (see “Account Linking” on page 6).

**Note:** A selection is required regardless of whether you will use pseudonyms for account linking. This allows account linking to be used later without having to delete and reconfigure the adapter. Ensure that you choose at least one attribute that is unique for each user (for example, email) to prevent the same pseudonym from being assigned to multiple users.

You can also choose to mask the values of any or all attributes that PingFederate logs from the adapter at runtime (see “Attribute Masking” on page 10).

9. Click **Next**.

10. On the **Summary** screen, review the configuration and click **Done**.

You can also click any heading to go back and change information.

11. On the Manage Adapter Instances screen, click **Save**.

**Important:** You must click **Save** if you wish to retain the adapter configuration.

### Configuring the SP LDAP Adapter

1. If you have not already done so, establish a connection between PingFederate and your LDAP server (see “Configuring an LDAP Connection” on page 76).

2. Click **SP Adapters** on the Main Menu.

3. On the Manage Adapter Instances screen, click **Create New Adapter Instance**.
4. On the Adapter Type screen, enter an Adapter Instance Name and Adapter Instance Id, select LDAP Authentication Service 2.0 as the Adapter Type, and click Next. The Adapter Instance Id may not contain spaces or underscores.

5. On the SP Adapter Instance screen, enter the values for adapter configuration as described on the screen and click Next.

**Note:** If you do not know the values to enter at this time, select the “LDAP Datastore” and enter placeholders for other entries in valid formats similar to those shown in the screen example below. You can return to this screen to enter the correct values at any time (see “Configuring SP Adapters” on page 194). Click Manage Data Stores if you have not established a connection to your LDAP server.
6. (Optional) Click **Show Advanced Fields** and change default settings as needed.

Due to import control restrictions, the standard JRE distribution supports strong but not unlimited encryption. To use the strongest AES encryption, when permissible, download and install the appropriate version of “Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files” from the Sun download Web site (http://java.sun.com/javase/downloads).

Ping Identity recommends that users apply strong password policies for encryption of data passed via the adapter. There are many resources for determining what constitutes a strong password. For more information, refer to any of the following sites:

- http://www.securityfocus.com/infocus/1192
- http://www.cert.org/tech_tips/unix_configuration_guidelines.html#A

7. Click **Next**.

8. On the Adapter Actions screen, click **Download** under Action Invocation Link.
9. On the next screen, click **Export** and save the properties file.
   
   The properties must be available to your application. Refer to the User Guide for your Integration Kit for details.

10. Click **Next**.

11. (Optional) On the Extended Adapter Contract screen, configure additional attributes as needed for this adapter instance (see “Extending an Adapter Contract” on page 198).

12. On the Summary screen, review the configuration and click **Done**.

   You can also click any heading to go back and change information.

13. If this is a second adapter instance, click **Next** and map at least one target URL to an adapter instance (see “Mapping URLs to SP Adapter Instances” on page 199).

   For a third and subsequent adapter instances, this step is optional

14. On the Manage Adapter Instances screen (or the Map URLs to Adapter Instances screen), click **Save**.

   **Important:** You must click **Save** if you wish to retain the adapter configuration.
Appendix B
LDAP Adapter Configuration
Application Endpoints

These endpoints provide a means, via standard HTTP, by which external applications can communicate with the PingFederate server.

**Note:** Begin each URL with the fully qualified server name and port number of your IdP or SP PingFederate server: for example: https://www.pingidentity.com:9031/idp/startSSO.ping.

The SSO and SLO endpoints for an IdP and an SP include optional parameters which you can use to specify error pages that users will see in the event of an SSO or SLO failure. By default, PingFederate provides templates for these and other errors or conditions (see “Customizing User-Facing Screens” on page 50).

For either SP or IdP servers, a maintenance endpoint is also provided for administrators to verify that the server is running (see “Maintenance Endpoint” on page 297).

## IdP Endpoints

The following sections describe PingFederate IdP endpoints, including the query parameters that each accepts or requires. These endpoints accept either the HTTP GET or POST methods.

**Important:** When the parameter TargetResource (or Target) is used and includes its own query parameters, the parameter value must be URL-encoded. For information about URL encoding, see, for example, “HTML URL-encoding Reference” (www.w3schools.com/tags/ref_urlencode.asp).
Appendix C
Application Endpoints

/idp/startSSO.ping

This is the path used to initiate an unsolicited IdP-initiated SSO transaction during which a SAML response containing an assertion is sent to an SP. Typically, a systems integrator or developer creates one or more links to this endpoint in the IdP application or portal to allow users to initiate SSO to various SPs.

For information about allowing applications to retrieve configuration data from the PingFederate server over SOAP, see “Web Service Interfaces” on page 299.

The following table shows the HTTP parameters for this endpoint.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnerSpId or PARTNER</td>
<td>The federation ID of the SP to whom the SAML response containing an assertion should be issued. One of these parameters is required unless the federation ID can be derived from TargetResource or TARGET (see below).</td>
</tr>
<tr>
<td>TargetResource or TARGET (optional)</td>
<td>For SAML 2.0, the value of either parameter is passed to the SP as the RelayState element of a SAML response message. This is the PingFederate implementation of the SAML 2.0 indicator for a desired resource at the SP during IdP-initiated SSO. For SAML 1.x, the value is sent to the SP as a parameter named TARGET. <strong>Note:</strong> If this parameter is not provided in the URL, then the target resource should be specified in the administrative console (see “Configuring a Default URL and Error Message” on page 109).</td>
</tr>
<tr>
<td>InErrorResource (optional)</td>
<td>Indicates where the user is redirected after an unsuccessful SSO. If this parameter is not included in the request, PingFederate redirects the user to the SSO error landing page hosted within PingFederate (see “Customizing User-Facing Screens” on page 50).</td>
</tr>
<tr>
<td>Binding (optional)</td>
<td>Indicates the binding to be used; allowed values are URIs defined in the SAML specifications. For example, the SAML 2.0 applicable URIs are: urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Artifact urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST When the parameter is not used, the default ACS URL configured for the SP-partner connection is used, unless an ACS index is specified (see the next parameter, ACSIdx).</td>
</tr>
</tbody>
</table>
IdP Endpoints

This is the path used to initiate an IdP-initiated SLO (under SAML 2.0). Typically, a systems integrator or developer creates one or more links to this endpoint in the protected resources of their IdP application or portal to allow users to end their sessions at various SPs. This endpoint uses the local PingFederate session to determine which SPs have been issued an SSO assertion and sends them a SAML logout request.

The following table shows the HTTP parameters for this endpoint.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACSIdx</td>
<td>Specifies the index number of partner’s ACS (see “Setting Assertion Consumer Service URLs (SAML)” on page 150). Takes precedence over the Binding parameter if both are specified. If neither the binding nor index is specified in the call, the default ACS is used.</td>
</tr>
<tr>
<td>IdpAdapterId</td>
<td>Allows an application to call out what IdP adapter to use for authentication (in a configuration with multiple IdP adapters).</td>
</tr>
<tr>
<td>RequestedFormat</td>
<td>Allows control over the NameId format.</td>
</tr>
</tbody>
</table>

/idp/startSLO.ping

This is the path used to initiate an IdP-initiated SLO (under SAML 2.0). Typically, a systems integrator or developer creates one or more links to this endpoint in the protected resources of their IdP application or portal to allow users to end their sessions at various SPs. This endpoint uses the local PingFederate session to determine which SPs have been issued an SSO assertion and sends them a SAML logout request.

The following table shows the HTTP parameters for this endpoint.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TargetResource</td>
<td>Indicates where the user is redirected after a successful SLO. If this parameter is not included in the request, PingFederate uses as a default the URL for a successful SLO as entered on the IdP Default URL screen.</td>
</tr>
<tr>
<td>InErrorResource</td>
<td>Indicates where the user is redirected after an unsuccessful SLO. If this parameter is not included in the request, PingFederate redirects the user to the SLO error landing page hosted within PingFederate (see “Customizing User-Facing Screens” on page 50).</td>
</tr>
</tbody>
</table>
| Binding (optional - SAML 2.0) | Indicates the binding to be used; allowed values are URIs defined in the SAML specifications. The SAML 2.0 applicable URIs are:  

  - urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Artifact  
  - urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST  
  - urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect  
  - urn:oasis:names:tc:SAML:2.0:bindings:HTTP-SOAP  

When the parameter is not used, the first SLO Service URL configured for the SP-partner connection is used (see “Specifying SLO Service URLs (SAML 2.0)” on page 153).
Appendix C
Application Endpoints

/idp/writecdc.ping

This endpoint is used for SAML 2.0 IdP Discovery. This is the path used when the IdP wants to write to the Common Domain Cookie (CDC) held within the user's browser. The information written to the cookie indicates from which IdP this user has authenticated.

The following table shows the one HTTP query parameter for this endpoint.

<table>
<thead>
<tr>
<th>TargetResource (optional)</th>
<th>Indicates where the user is redirected after successful IdP Discovery. If this parameter is not included in the request, PingFederate redirects the user to the referrer in the HTTP header. If there is no TargetResource or referrer, the call to this endpoint will fail.</th>
</tr>
</thead>
</table>

/pf/heartbeat.ping

See “Maintenance Endpoint” on page 297.

SP Endpoints

The following sections describe the PingFederate SP endpoints, including the query parameters that each accepts or requires. These endpoints accept either the HTTP GET or POST methods.

Important: When the parameter TargetResource is used and includes its own query parameters, the parameter value must be URL-encoded. For information about URL encoding, see, for example, “HTML URL-encoding Reference” (http://www.w3schools.com/tags/ref_urlencode.asp).

/sp/startSSO.ping

This is the path used to initiate SP-initiated SSO. In this scenario, the SP issues an SSO request to the IdP asking for an SSO authentication response. Typically, a systems integrator or developer creates one or more links to this endpoint in SP applications to allow users to access various protected resources via SSO using the IdP as an authentication authority.

For information about allowing applications to retrieve configuration data from the PingFederate server over SOAP, see “Web Service Interfaces” on page 299.

The following table shows the HTTP parameters for this endpoint.

<p>| PartnerIdpId (required if more than one IdP connection is configured and Domain is not used) | The federation ID of the IdP that will authenticate the user and issue an assertion. |</p>
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domain</strong> (required to invoke Auto-Connect)</td>
<td>The domain name associated with the requesting user’s IdP (see “Using Auto-Connect” on page 19). In this case, <code>PartnerIdpId</code> cannot be used.</td>
</tr>
<tr>
<td><strong>TargetResource or TARGET (optional)</strong></td>
<td>This parameter indicates where the end-user is redirected after a successful SSO.</td>
</tr>
<tr>
<td><strong>Note</strong>:</td>
<td>If this parameter is not provided in the URL, then the target resource should be specified in the administrative console (see “Configuring Default URLs” on page 201).</td>
</tr>
<tr>
<td><strong>Binding (optional)</strong></td>
<td>Indicates the binding to be used; allowed values are URLs defined in the SAML specifications. For example, the SAML 2.0 applicable URLs are:</td>
</tr>
<tr>
<td></td>
<td><code>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Artifact</code></td>
</tr>
<tr>
<td></td>
<td><code>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST</code></td>
</tr>
<tr>
<td></td>
<td><code>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect</code></td>
</tr>
<tr>
<td><strong>InErrorResource (optional)</strong></td>
<td>This parameter indicates where the end-user is redirected after an unsuccessful SSO.</td>
</tr>
<tr>
<td></td>
<td>If this parameter is not included in the request, PingFederate redirects the user to the SLO error landing page hosted within PingFederate (see “Customizing User-Facing Screens” on page 50).</td>
</tr>
<tr>
<td><strong>SpSessionAuthn AdapterId (optional)</strong></td>
<td>The explicit SP adapter instance ID indicating the adapter to use to create an authenticated session or security context.</td>
</tr>
<tr>
<td><strong>ForceAuthn (optional - SAML 2.0)</strong></td>
<td>This parameter controls the attribute of the same name in the <code>AuthnRequest</code>. (The default is <code>false</code>.)</td>
</tr>
<tr>
<td><strong>IsPassive (optional - SAML 2.0)</strong></td>
<td>This parameter controls the attribute of the same name in the <code>AuthnRequest</code>. (The default is <code>false</code>.)</td>
</tr>
<tr>
<td><strong>AllowCreate (optional - SAML 2.0)</strong></td>
<td>Controls the value of the <code>AllowCreate</code> attribute of the <code>NameIDPolicy</code> element in the <code>AuthnRequest</code>. (The default is <code>true</code>.)</td>
</tr>
<tr>
<td><strong>RequestedFormat (optional - SAML 2.0)</strong></td>
<td>Specifies the value for the <code>Format</code> attribute in the <code>NameIDPolicy</code> element of the <code>AuthnRequest</code>. If not specified, the attribute is not included in the <code>AuthnRequest</code>.</td>
</tr>
</tbody>
</table>
If an adapter is specified in `SpSessionAuthnAdapterId`, then that adapter is used to create an authenticated session for SP-initiated SSO. If there is no `SpSessionAuthnAdapterId`, the ultimate destination of the user after SSO (either the `TargetResource` or the default SSO success URL) is used along with the mappings defined in the administrative console on the Map URLs to Adapter Instances screen (see “Mapping URLs to SP Adapter Instances” on page 199).

Note that adapter selection for SP-initiated SSO is similar to that for IdP-initiated SSO except that, because the adapter ID is dependent on the SAML deployment, PingFederate cannot expect it from an IdP. Therefore, it uses only the URL mapping for adapter selection for SSO.

/sp/startSLO.ping

This is the path used to initiate SP-initiated SLO. Typically, a systems integrator or developer creates one or more links to this endpoint in the protected resources of their SP application, which allows users to end a session by sending a logout request to the IdP that authenticated the session.

Note that the IdP might send additional logout request messages to other SPs when it receives a logout request from a PingFederate server acting as an SP.

The following table shows the HTTP parameters for this endpoint.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RequestedACSIIdx (optional - SAML 2.0)</td>
<td>The index number of your site’s Assertion Consumer Service, where you want the assertion be sent.</td>
</tr>
<tr>
<td>RequestedBinding (optional - SAML 2.0)</td>
<td>Indicates the binding requested for the response containing the assertion; allowed values are URLs defined in the SAML specifications.</td>
</tr>
<tr>
<td>RequestedAuthnCtx (optional - SAML 2.0)</td>
<td>Indicates the requested authentication context of the assertion; allowed values are URLs defined in the SAML specifications (see the OASIS SAML document: saml-authn-context-2.0-os.pdf).</td>
</tr>
<tr>
<td>RequestedSPName Qualifier (optional - SAML 2.0)</td>
<td>Indicates that the IdP should return the given name qualifier as part of the assertion (used primarily to identify SP affiliations—see “Defining SP Affiliations” on page 185).</td>
</tr>
<tr>
<td>TargetResource (optional)</td>
<td>Indicates where the user is redirected after a successful SLO. If this parameter is not included in the request, PingFederate uses as a default the URL for a successful SLO, as entered on the SP Default URLs screen.</td>
</tr>
</tbody>
</table>
An SP PingFederate session can be associated with one or more application sessions relying on any number of IdPs as the session authority. PingFederate must choose one session to terminate and also send an SLO request to the IdP that issued the assertion that created the session. Sessions are associated with the ID of the adapter instance that created them. Once an adapter ID is determined, the first session found with that ID is used. Determination of the adapter instance ID occurs in the following order:

1. If there is a value for the `SpSessionAuthnAdapterId` parameter, it is used.
2. If there is a value for the `SourceResource` parameter, PingFederate attempts to map a URL to an adapter using that value to determine the adapter ID.
3. If there is an HTTP header value for `Referer` [sic], PingFederate attempts to map a URL to an adapter using that value to determine the adapter ID.
4. If none of the above is successful, the `TargetResource` parameter value or the value for the default SLO success URL are used to map a URL to an adapter.
5. Finally, if no adapter ID is determined, the first one in the list is used.

### Table: SP Endpoints

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binding (optional - SAML 2.0)</td>
<td>Indicates the binding to be used; allowed values are URIs defined in the SAML specifications. The SAML 2.0 applicable URIs are: urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Artifact urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect urn:oasis:names:tc:SAML:2.0:bindings:HTTP-SOAP When the parameter is not used, the first SLO Service URL configured for the IdP-partner connection is used (see “Specifying SLO Service URLs (SAML 2.0)” on page 240).</td>
</tr>
<tr>
<td>InErrorResource (optional)</td>
<td>Indicates where the user is redirected after an unsuccessful SLO. If this parameter is not included in the request, PingFederate redirects the user to the SLO error landing page hosted within PingFederate (see “Customizing User-Facing Screens” on page 50).</td>
</tr>
<tr>
<td>SpSessionAuthnAdapterId (optional)</td>
<td>The SP adapter instance ID indicating which session to terminate and which IdP will receive the logout request.</td>
</tr>
<tr>
<td>SourceResource (optional)</td>
<td>A URL indicating the origin of the logout request. It is mapped to an adapter ID in order to designate which session to terminate.</td>
</tr>
</tbody>
</table>
Appendix C
Application Endpoints

/sp/defederate.ping

This is the path used to terminate an account link created during SSO. Account linking provides a means for subject identification on the SP side. Links are created and terminated entirely by a user on the SP side. The link contains the name identifier from the IdP, the IdP’s federation ID, the adapter instance ID, and the local user identifier.

There are no HTTP parameters for this endpoint.

You can unlink a user session only if was established during SSO using an existing account link on the SP side. If more than one SP session was established via account linking on the same PingFederate session, each of those links will be terminated by this endpoint. A local logout is also performed for any link that is terminated.

/sp/cdcstartSSO.ping

This endpoint is used for IdP-Discovery implementations (see “IdP Discovery” in the “Supported Standards” chapter of Getting Started). This endpoint is similar to /sp/startSSO.ping and accepts the same parameters, with the exception of PartnerIdpId (see “/sp/startSSO.ping” on page 292). Instead of this parameter, the server attempts to use the common domain cookie to determine the IdP.

/sp/startAttributeQuery.ping

This endpoint is used to initiate an Attribute Query with a SAML 2.0 IdP (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

The following table shows the HTTP parameters for this endpoint.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Uniquely identifies the user to the IdP. When user authenticates with an x.509 certificate, this is the Subject DN, which must be URL encoded.</td>
</tr>
<tr>
<td>Issuer (optional)</td>
<td>The IssuerDN from the user’s x.509 certificate (when XASP is used), which uniquely identifies the entity that issued the user’s certificate. The parameter must be URL encoded.</td>
</tr>
<tr>
<td>PartnerIdpId (optional)</td>
<td>Used to identify the specific IdP partner to which the Attribute Query should be sent. If this parameter is not present, the Subject and Issuer are used to determine the correct IdP.</td>
</tr>
</tbody>
</table>
Maintenance Endpoint

For either an SP or an IdP PingFederate server, an endpoint is provided to report whether the server is running.

/pf/heartbeat.ping

This endpoint returns an “OK” browser message and an HTTP 200 status indication if the PingFederate server is running. If you receive an HTTP 404 error, the server associated with the endpoint is down.

Load balancers can use this endpoint to determine the status of PingFederate independently of checks used to determine the status of the supporting hardware.

You can also configure the server to provide regular status information to a network-management utility (see “Configuring Runtime Reporting” on page 59).
PingFederate provides two Web Services for external clients. These services may be used by client applications to manage partner connections and support integration of Web applications, respectively:

- **Connection Management Service** — Enables creation and deletion of single connection configurations in PingFederate. This service may be used to migrate connections from one server environment to another (for example, from testing or staging to production) or to create new connections in a single server programmatically.

  **Tip:** PingFederate provides a command-line utility that can be used to export and modify connections, and then import them to target environments (see “Automating Configuration Migration” on page 46).

- **SSO Directory Service** — Provides Web application developers with information regarding partner connections and adapter instances.

  **Tip:** Applications accessing the Connection Management Service must first authenticate themselves to the PingFederate server. SSO Directory Service authentication is optional by default, but may be required. For more information, see “Application Authentication” on page 97.

### Connection Management Service

The Connection Management Service supports basic connection management capabilities and is accessible only on a PingFederate server running the administrative console. This feature is useful in a variety of circumstances, but the following primary use cases were considered:
Web Service Interfaces

- As a utility to migrate changes to a partner connection though staging environments (for example: development, test, production).
  Changes to URLs and keys may be needed to make the connection appropriate to the next environment.
- As a way for an external application to update or delete connections programmatically, or create new ones using an exported connection XML file as a template.

The WAR file for this service, pf-mgmt-ws.war, is located in the pingfederate/server/default/deploy2 directory.

**Note:** If you do not want to allow use of the service, it should not be deployed: remove the WAR file from the deploy2 directory.

The SOAP-accessible service endpoint is pf-mgmt-ws/ws/ConnectionMigrationMgr.

The Web Services Description Language (WSDL) document describing this service can be retrieved from:

https://<host_server>:<admin_console_port>/pf-mgmt-ws/ws/ConnectionMigrationMgr?wsdl

### Exporting a Connection

You can export a connection either manually by using the administrative console or programmatically, via a call to the Connection Management Service.

In either case, the exported XML complies with the standard SAML 2.0 metadata format, with extensions to capture PingFederate's proprietary configuration. Most connection configuration information is contained in the XML markup, with the exception of global configuration items such as adapter instances, data stores, and keypairs. Adapter instances and data stores are referenced by ID, and keypairs are referenced by the MD5 fingerprint of their X.509 certificate. Public certificates, such as the partner's signature verification certificate, are included completely (base-64 encoded).

#### Exporting Manually

For information about using the administrative console to export SP connections at an IdP site, see “Using the Manage Connections Screen” on page 114.

For information about exporting IdP connection at an SP site, see “Using the Manage Connections Screen” on page 208.

#### Using the Connection Service

The Connection Web Service exposes the following method for exporting connections:

```java
public string getConnection(
    String entityId,
    String role,)
throws IOException
```
**Code Sample**

```java
Service service = new Service();
Call call = (Call)service.createCall();
call.setUsername("username");
call.setPassword("password");
call.setTargetEndpointAddress("https://localhost:9999/pf-mgmt-ws/ws/ConnectionMigrationMgr");
call.setOperationName("getConnection");
Object result = call.invoke(new Object[] {
    "entityId", 
    "SP"
});
```

**Importing Connections**

Moving a connection from one PingFederate server to another requires care, as the target server must contain the global configuration items (data stores, keypairs, and adapter instances) that the connection references. Changing the references in the XML file—either manually or programmatically—may be necessary to adjust the connection to the target PingFederate environment.

Once required changes are made to the XML file, developers can use the Connection Management Service to import the connection into a different instance of PingFederate.

**Tip:** Alternatively, you can import XML connection files into PingFederate manually by copying them into the directory:

```
<pf_install>/pingfederate/server/default/
data/connection-deployer
```

PingFederate scans this directory periodically and imports connections automatically.

**Caution:** Manually importing a connection always overwrites an existing connection with the same ID (the Web Service provides a switch to disallow this behavior, if desired—see below).

The Web Service exposes the following method for importing connections:

```java
public void saveConnection(
    String xml,
    boolean allowUpdate) throws IOException
```

The `xml` parameter is the complete representation of the connection retrieved by your application from an exported connection file (and optionally modified).

If `allowUpdate` is false, the Web Service can be used only to add a new connection. An error occurs if a connection already exists with the same connection ID and federation protocol in the XML. If `allowUpdate` is true and the connection already exists, it will be overwritten.

**Code Sample**

Below is example client code using the Apache AXIS libraries that invokes this Web Service to create a new connection:

```java
Service service = new Service();
```
Deleting Connections

The Web Service exposes the following method for connection deletion:

```java
public void deleteConnection(
    String entityId,
    String role) throws IOException
```

The `entityId` parameter is the Connection ID, which identifies the connection to be deleted. The `role` parameter is the connection role—IDP or SP.

**Code Sample**

Below is example client code using the Apache AXIS libraries that invokes this Web Service to delete a connection:

```java
Service service = new Service();
Call call = (Call) service.createCall();
call.setUsername("username");
call.setPassword("password");
call.setTargetEndpointAddress("https://localhost:9999/pf-mgmt-ws/ws/ConnectionMigrationMgr");
call.setOperationName("deleteConnection");
call.invoke(new Object[]{"entityId", "SP"});
```

Cluster Configuration Replication

A Web Service endpoint is available to replicate the administrative-console configuration to other nodes in a PingFederate cluster. This allows a Web Service client to create or update a new connection (or delete a connection) and then push the new configuration to the other cluster nodes.

The service endpoint is:

```
/pf-mgmt-ws/ws/ConfigReplication
```

The WSDL document describing this service can be retrieved from:

```text
https://<host_server>:<admin_console_port>/pf-mgmt-ws/ws/ConfigReplication?wsdl
```
The Web Service exposes the following method:
public void replicateConfiguration();

**Code Sample**

Below is example client code using the Apache AXIS libraries that invokes the configuration replication functionality:
```java
Call call2 = (Call) service.createCall();
    call2.setUsername("joe");
    call2.setPassword("test");
    String addr2 = "https://localhost:9999/pf-mgmt-ws/ws/ConfigReplication";
    call2.setTargetEndpointAddress(addr2);
    call2.setOperationName("replicateConfiguration");
    call2.invoke(new Object[]{});
```

**Validation Disclaimer**

The import process is not subject to the same rigorous data validation performed by the administrative user interface. Although some checks are made, it is possible to create invalid connections using the connection-migration process. Therefore, because the XML is complex and validation is limited, attempting to create an XML connection from scratch is not recommended. Rather, the administrative console should be used to create the initial connection. That way, changes necessary to the exported connection's XML representation can be held to a minimum, reducing the risk of compromising data integrity.

**SSO Directory Service**

PingFederate SSO Directory Service allows applications to retrieve configuration data from a runtime PingFederate server. (A PingFederate server in a cluster configured as an administrative console does not support this Web Service.) This service allows Web applications to avoid storing and maintaining the data locally. These types of data can be retrieved:

- A list of IdP partners
- A list of SP partners
- A list of IdP adapter instances
- A list of SP adapter instances

The SSO Directory Service provides information useful for integrating an application with a PingFederate server. It is a way for the application to find out dynamically which partners can be used for SSO. This means applications need not be modified when new partners are configured in PingFederate.
The WAR file for this module, pf-ws.war, is located in the pingfederate/server/default/deploy directory.

**Note:** If you do not want to allow use of the service, it should not be deployed: remove the WAR file from the deploy directory.

The service endpoint is pf-ws/services/SSODirectoryService.

The WSDL document describing this service can be retrieved from:

http(s)://<pf_runtime_host>:<runtime_port>/pf-ws/services/SSODirectoryService?wsdl

You can retrieve a list using any of the following methods:

- **getIDPList** – Returns a list of active IdPs containing each IdP’s Connection ID and Connection Name
- **getSPList** – Returns a list of active SPs containing each SP’s Connection ID and Connection Name

**Note:** For either IdP or SP lists, Connection IDs are returned as values for the XML tag `<entityId>`. Connection Names are returned as values for the XML tag `<company>` (see “SOAP Request and Response Example” on page 306).

- **getAdapterInstanceList** – Returns a list of SP adapter instances containing an ID and name
- **getIdpAdapterInstanceList** – Returns a list of IdP adapter instances containing an ID and name

**Note:** These methods do not require input parameters.

The service is also available over HTTP. The query string for retrieving any of the lists is:

/pf-ws/services/SSODirectoryService?method=<method_name>

**Code Example**

When you integrate a Web application with PingFederate, use the SSO Directory Service to generate a connection or adapter list. The code needed to create any of the lists is similar.

The following Java code example retrieves an IdP list from the Web Service. The program calls the `getIDPList` method in the SSO Directory Service to retrieve an IdP list and print it to the console. This example uses the Apache Axis library and includes optional code for authentication to the PingFederate...
server (see “Application Authentication” on page 97). We recommend the use of HTTPS when including credentials.

```java
import org.apache.axis.client.Call;
import org.apache.axis.client.Service;
import java.net.URL;
import javax.xml.namespace.QName;
import com.pingidentity.ws.SSOEntity;

public class SSODirectoryClientSample {
    public static void main(String[] args) throws Exception {
        Service service = new Service();
        Call call = (Call) service.createCall();
        call.setUsername("username");
        call.setPassword("pass");
        URL serviceUrl = new URL("https://localhost:9031/pf-ws/services/SSODirectoryService");
        QName qn = new QName("urn:BeanService", "SSOEntity");
        call.registerTypeMapping(SSOEntity.class, qn,
                                new org.apache.axis.encoding.ser.BeanSerializerFactory(SSOEntity.class, qn),
                                new org.apache.axis.encoding.ser.BeanDeserializerFactory(SSOEntity.class, qn));
        call.setTargetEndpointAddress(serviceUrl);
        call.setOperationName(new QName("http://www.pingidentity.com/servicesSSODirectoryService", "getIDPList"));
        Object result = call.invoke(new Object[] {});
        if (result instanceof SSOEntity[]) {
            SSOEntity[] idpArray = (SSOEntity[]) result;
            for (SSOEntity idp : idpArray) {
                System.out.println(idp.getEntityId() + " " + idp.getCompany());
            }
        } else {
            System.out.println("Received problem response from server: " + result);
        }
    }
}
```
SOAP Request and Response Example

A client application must send a SOAP request to the PingFederate server specifying the requested Web Service and the specific method. For example, the following is a typical SOAP request for an IdP list using the SSO Directory Service.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:xsd="http://www.w3.org/2001/XMLSchema"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <soapenv:Body>
    <ns1:getIDPList
        soapenv:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
        xmlns:ns1="https://localhost:9031/ssodir/services/SSODirectoryService"/>
  </soapenv:Body>
</soapenv:Envelope>
```

The PingFederate server’s Web Service will return a response containing the list you requested. The following is an example of a typical SOAP response for an IdP list:

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:xsd="http://www.w3.org/2001/XMLSchema"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <soapenv:Body>
    <getIDPListResponse
        soapenv:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">
      <getIDPListReturn
          soapenc:arrayType="ns1:IDP[2]" xsi:type="soapenc:Array"
          xmlns:ns1="urn:BeanService"
          xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding">
        <getIDPListReturn href="#id0" />
        <getIDPListReturn href="#id1" />
      </getIDPListReturn>
    </getIDPListResponse>
  </soapenv:Body>
</soapenv:Envelope>
```

```xml
<multiRef id="id0" soapenc:root="0"
    soapenv:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
    xsi:type="ns2:IDP"
    xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding/"
    xmlns:ns2="urn:BeanService">
  <company xsi:type="xsd:string">MegaMarket</company>
```

```xml
<multiRef id="id1" soapenc:root="1"
    soapenv:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
    xsi:type="ns2:IDP"
    xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding/"
    xmlns:ns2="urn:BeanService">
  <company xsi:type="xsd:string">MegaMarket</company>
```
<entityId xsi:type="xsd:string">www.megamarket.com</entityId>
</multiRef>
<multiRef id="id1" soapenc:root="0"
  soapenv:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/
  xsi:type="ns3:IDP" xmlns:ns3="urn:BeanService"
  xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding/">
  <company xsi:type="xsd:string">Ping</company>
  <entityId
    xsi:type="xsd:string">pingfederate3:default:entityId</entityId>
</multiRef>
</soapenv:Body>
</soapenv:Envelope>
Using Attribute Mapping Expressions

PingFederate provides an advanced option allowing administrators to map user attributes by way of an expression language. Because the option carries with it a potential for misuse, however, it is disabled in the administrative console for security reasons.

**Tip:** If you are upgrading to PingFederate 5.1 or higher and importing a configuration archive that uses expression mapping, the feature will be enabled automatically.

This appendix describes the option, which is based on the Object-Graph Navigation Language (OGNL), and how to enable or disable it.

**Caution:** The security concern posed by OGNL is related to a potential for abuse by PingFederate administrative users within an organization; the concern is not related to any known external threats. We recommend, however, that the option be enabled only if required.

### About OGNL

OGNL is based on the Java programming language. OGNL expressions are useful for evaluating and manipulating attribute values and returning information based on the results. You can also transform a range of values into a text description, or do the same for a sequence of ranges.

In the expression below, for example, the value of the attribute “net-worth” is transformed first to eliminate any dollar signs or commas, then the result is
evaluated to determine whether the user's net worth falls into a “bronze,” “silver,” or “gold” category:

```
#result=#this.get("salary").toString(),
#result=#result.replace("$",""),
#result=#result.replace(",",""),
#result < 500000 ? "bronze" :
#result < 1000000 ? "silver" : "gold"
```

Use the # symbol to reference OGNL variables. For an IdP, PingFederate provides predefined OGNL variables for IdP-adapter attributes as well as any attributes retrieved from data stores. For an SP, variables are available for attributes received in an assertion or an attribute query. For example, the SAML_SUBJECT value may be retrieved using:

```
#SAML_SUBJECT
```

For data-store attributes, use this syntax (for example):

```
#this.get("ds.amount")
```

For more information, see “Using the OGNL Edit Screen” on page 312.

For more information about OGNL, see the OGNL Web site, www.ognl.org.

**Note:** The PingFederate runtime engine uses OGNL version 2.6.7.

### Enabling/Disabling Expressions

OGNL can be manually enabled or disabled for attribute mapping by editing a configuration file located in:

```
<pf_install>/pingfederate/server/default/data/config-store/
```

**Important:** If OGNL is enabled and expressions configured anywhere in the administrative console, disabling the feature will cause errors during runtime processing.
To enable or disable OGNL expressions:

1. In the directory cited above, open the file:
   
   `org.sourceid.common.ExpressionManager.xml`

2. Change the value of the element named `evaluateExpressions` to either `true` or `false` and save the file. For example:
   
   `<item name="evaluateExpressions">true</item>`

   **Note:** The absence of a value (the installed default) does not necessarily disable the use of OGNL expressions. To facilitate backward compatibility, when no value is present, configuration archives containing expressions can be imported successfully, and further use of the feature is enabled. (The term “silent” is used for this condition in the server log.)

3. Start or restart PingFederate.

   **Tip:** If you are enabling OGNL to use for mapping SaaS-provisioning attributes, it is not necessary to restart the PingFederate server.

When OGNL expressions are enabled, the selection `Expression` is available in the drop-down menus under `Source` in each of the administrative-console Fulfillment screens (see Figure 4), and the feature is available on the SaaS-provisioning attribute-mapping screen (when SaaS Provisioning itself is enabled—see “SaaS Provisioning” on page 22).

![Figure 4: Attribute Contract Fulfillment (Example)](image)

When you make this selection, you can enter the expression in the text field provided. You can also test expressions (see the next section).
Using the OGNL Edit Screen

An in-line editor is available for OGNL expressions. The editor validates the expression and allows an administrator to enter input values and test the resulting output.

► To reach the OGNL editor, click Edit under Actions for an expression on any of the attribute fulfillment screens.

Here is an example of the edit screen, from the IdP configuration flow:

To test an expression:
1. Enter an input value in the Source text box associated with the attribute.
2. Click the Test link near the bottom right of the screen.
   
   If the expression contains no errors, the result is displayed under Test Results.

Important: If you make changes to an expression and want to save them, click Update under Actions. To discard changes, click the Cancel link under Actions; clicking the Cancel button near the bottom of the screen discards all changes you have made in the current task.
Basic troubleshooting tips are provided here to help overcome common difficulties. Please contact Ping Identity at 877.898.2905 or support@pingidentity.com for further information.

This appendix contains the following sections:

- “Data Stores” on page 313
- “Installation” on page 314
- “Protocols” on page 314
- “Server” on page 315

## Data Stores

### Table 13: Troubleshooting Data Stores

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>When setting up the JDBC data store, a connection cannot be established.</td>
<td>Verify that the proper drivers and connectors have been installed. Also, verify the connection URL, username, and password. If unsuccessful, contact your database administrator.</td>
</tr>
</tbody>
</table>
Cannot connect to a Directory Service with the LDAP protocol.

Verify the connection URL, port, principal, and credentials. If unsuccessful, contact your system administrator.

If using LDAP with SSL/TLS (ldaps://), ensure the LDAP server's SSL certificate is signed by a trusted certificate authority or import the certificate into your JAVA_HOME/jre/lib/security/cacerts keystore (consult your Java documentation and the Java keytool documentation).

The trusted certificates stored and accessed through the PingFederate console are used only with SOAP connections, not other SSL/TLS connections.

### Table 13: Troubleshooting Data Stores (Continued)

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cannot connect to a Directory Service with the LDAP protocol.</td>
<td>Verify the connection URL, port, principal, and credentials. If unsuccessful, contact your system administrator. If using LDAP with SSL/TLS (ldaps://), ensure the LDAP server's SSL certificate is signed by a trusted certificate authority or import the certificate into your JAVA_HOME/jre/lib/security/cacerts keystore (consult your Java documentation and the Java keytool documentation). The trusted certificates stored and accessed through the PingFederate console are used only with SOAP connections, not other SSL/TLS connections.</td>
</tr>
</tbody>
</table>

### Installation

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Error message “Not enough memory on the server”</td>
<td>Verify that there is at least 1,024 MB of RAM installed on the server (see “System Requirements” in the “Installation” chapter of Getting Started).</td>
</tr>
<tr>
<td>Exception in thread “main” java.lang.NoClassDefFoundError</td>
<td>Make sure PingFederate is installed in a directory path that does not contain spaces.</td>
</tr>
</tbody>
</table>

### Protocols

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificates unexpectedly expire.</td>
<td>Verify that the server clocks are synchronized on both sides of the federation. Note that you can configure PingFederate to notify administrators in advance of impending certificate expiration (see “Configuring Runtime Notifications” on page 57).</td>
</tr>
</tbody>
</table>
### Table 16: Troubleshooting the PingFederate Server

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>PingFederate does not start.</td>
<td>Make sure that the Java SDK is installed (see “Installing the JDK” in the “Installation” chapter of Getting Started).</td>
</tr>
</tbody>
</table>
account link
A persistent name identifier that enables federation of separately established accounts among disparate domains (see also account linking and pseudonym).

account linking
A form of identity mapping among separate user accounts managed under different Internet domains. The mapping typically involves a name identifier—which may be a pseudonym—used to link the user to each account. The identifier is persisted at the SP site to enable seamless SSO/SLO. Additional attributes may be sent with the identifier.

account mapping
A form of identity mapping by which one or more user attributes is passed in a single sign-on transaction. The attributes are used at the destination site as a means identifying the user and looking up local account information.

adapter
Supplementary software that allows PingFederate to interact with Web applications and systems. Two adapter choices are bundled with PingFederate: an OpenToken Adapter for use with separately available developer integration kits, and an LDAP adapter for use with your active directory data store.

adapter contract
A list of attributes “hard-wired” to an adapter and conveyed generally via cookies between the adapter and application.

artifact
A reference to a SAML protocol message. The federation partner that receives the artifact dereferences it, identifying the sender, and requests the complete message in a separate SOAP transaction.

Artifact Resolution Service
The SOAP endpoint that processes artifacts returned from a federation partner to retrieve the referenced XML message. Can be used to dereference authentication requests, assertion responses, and SLO messages.

assertion
A SAML XML document that contains identifying information about a particular subject; i.e., a person, company, application, or system. A SAML assertion can contain authentication, authorization, and attribute information about the subject.

Assertion Consumer Service
A SAML-compliant portion of PingFederate in an SP role that receives and processes assertions from an IdP.

attributes
Distinct characteristics that describe a subject. If the subject is a Web site user, attributes may include a name, group affiliation, email address, etc.

attribute contract
A list of attributes, agreed to by the partners in an identity federation, representing information about a user (SAML subject). The attributes are sent from the IdP to the SP during SSO.
attribute mapping
A form of identity mapping between IdP and SP user accounts that uses attributes to identify the user or provide supplemental information.

audience
The XML element in a SAML assertion that uniquely identifies a Service Provider.

authentication context
An element in a SAML assertion indicating the method or process used by an IdP to authenticate the subject of the assertion; may be used for authorization decisions or auditing compliance.

attribute source
Specific database or directory location containing data needed by an IdP to fulfill a connection partner’s attribute contract or by an SP to look up additional attributes to fulfill an adapter contract.

back-channel
Server-to-server, cross-domain communication path using a protocol, typically SOAP, that does not rely on a browser as an intermediary.

binding
A mapping of SAML request and response messages to specific transport protocols (redirect, POST, or artifact).

certificate
A digital file used for identity verification and other security purposes. The certificate, which is often issued by a Certificate Authority (CA), contains a public key, which can be used to verify the originator’s identity.

Certificate Revocation List
(CRL) A list of revoked signing certificates, maintained by the issuing authority at a public URL.

channel
A dedicated SaaS Provisioning configuration specific to a particular service partner, data source, and target service.

connection partner
Entities, such as companies, that are part of an identity federation. These entities are referred to as connection partners in the PingFederate configuration process.

credential
Information used to identify a subject for access purposes (e.g., username and password). A credential can also be a certificate.

Database Management System
A system for storing and maintaining user account information and attributes. The tables and columns in the RDBMS are used by PingFederate to create user look-up and attribute retrieval queries. (See Java Database Connectivity.)

data store
A database or directory location containing user account records and associated user attributes.

defederation
Optional user-initiated delinking of an identity federation that uses a persistent name identifier or pseudonym for account linking.

digital signature
A process for verifying the identity of the originator of an electronic document and whether the document has been intercepted or altered. The process involves message signing, signature validation, and signing policy coordination between partners.

endpoint
A terminal or gateway that generates or terminates a stream of information. For example, a PingFederate SP server contains an endpoint for the Assertion Consumer URL.

entity ID
The XML element in a SAML assertion that uniquely identifies an Identity Provider.

Extensible Markup Language
A structured, hierarchical text format—based on SGML (Standard Generalized Markup Language)—for the flexible and organized exchange of data.

HTTP cookie
Information sent from a server to a Web browser to identify a registered Web site user. Once the cookie is placed in the browser, it is sent back to the server to identify the user every time the user accesses the site. PingFederate’s integration adapters interface with the cookie.

HTTP header
The section of an HTTP request or response containing information about the client or the server. PingFederate can use HTTP headers to look up session information passed by the IdP’s Web application.

HTTP request parameter
A named parameter sent as part of a URL request from a browser to a Web server.
identity federation
A trust agreement between or among organizations, implemented using accepted standards, to provide user-authentication tokens and other user or system attributes securely across Internet domains, primarily to enable cross-domain SSO.

Identity Provider
The identity source or SAML authority that authenticates a subject and provides an SP with a security assertion vouching for that authentication.

IdP-initiated SSO or SLO
An identity federation transaction in which the initial action requiring a security context from an IdP occurs at a SP’s site. For example, the user is logged on to an IdP and requests protected resources on an SP. The IdP sends authentication information to the SP.

inbound
A direction of message flow coming into a server relative to the server's identity federation role (IdP or SP). For an IdP, inbound messages include SAML authentication requests. For an SP, inbound messages include SAML assertions.

Java Database Connectivity (JDBC)
A Java API that allows Java programs to interact with databases.

keysize
The length (in bits) of each key in a keypair.

keypair
The private key and public key represented by a certificate. PingFederate uses the private key of its keypair(s) to generate signatures for assertions, requests, and responses, as applicable.

Lightweight Directory Access Protocol
A set of protocols used for accessing information directories. PingFederate uses the LDAP v3 protocol for user look-up and attribute processing.

metadata
The SAML 2.0 standards define a metadata exchange schema for conveying XML-formatted information between two SAML entities. Metadata includes endpoint URLs, binding types, attributes, and security policy information.

Online Certificate Status Protocol
(OCSP) A standard developed by the Internet Engineering Task Force that enables Internet applications to obtain the current status of signing certificates, indicating whether a certificate has been revoked, via HTTP.

opaque
Not readable. If a user’s subject identifier is opaque, the an SSO partner cannot directly identify the user with reference to the source. An persistent identifier, or pseudonym, can be used for Account Linking.

outbound
A direction of message flow leaving a server. For an IdP, outbound messages include SAML assertions. For an SP, outbound messages include SAML authentication requests.

partner
See connection partner.

portal
A Web-based application, accessed using a Web browser, that often aggregates content from multiple providers and/or serves as a central point of entry.

POST
An HTTP method of transmitting data contained in HTML forms, by which the data appears in the message body.

principal
A user, system, or process whose identity can be authenticated. See subject.

profiles
Rules that describe how to embed SAML assertions into and extract them out of other protocols in order to enable SSO or SLO. Profiles describe SAML request and response flows that fulfill specific use cases.

protected resource
Information, typically accessed via a Web URL, that is protected by an access management system. See target URL.

protocol
An agreed-upon format for transmitting data. XML format of SAML request or response messages.

pseudonym
A persistent name identifier assigned to a user and shared among entities, usually with the user’s permission, to enable SSO and SLO. Pseudonyms are often used with the SAML account linking protocol to enable SSO while preventing the discovery of the user’s identity or activities.
Public Key Infrastructure (PKI) Enables users of an unsecured public network, such as the Internet, to securely and privately exchange data and money through the use of keypairs and certificates. The PKI provides for a digital certificate that can identify an individual or an organization and directory services that can store and, when necessary, revoke the certificates.

redirect
A SAML binding that conveys a request or response by sending the user’s browser to another location. For instance, an authentication request can be sent from an SP through a browser to an IdP.

SAML
See Security Assertion Markup Language.

SAML authority
A security domain that issues SAML assertions.

Secure Sockets Layer
An encryption protocol that sends data between a client and server over a secure HTTP connection.

Security Assertion Markup Language (SAML)
A standard, XML-based, message-exchange framework enabling the secure transmittal of authentication tokens and other user attributes across Internet domains, primarily for the purpose of Web SSO.

security domain
An application or group of applications that trust a common security token used for authentication, authorization, or session management. The token is issued to a user after the user has authenticated to the security domain.

security token
A collection of information used to establish acceptable identity for security purposes. Tokens can be in binary or XML format. A SAML assertion is one kind of security token.

service-oriented architecture
A loosely coupled application architecture in which all functions or services are accessible via standard protocols. Interfaces are platform and programming-language independent.

Service Provider
A system entity that provides access to a protected resource based on authentication information supplied by an IdP.

SP-initiated SSO or SLO
An identity-federation transaction in which the initial action requiring a security context from an IdP occurs at a SP’s site.

session persistence
A mechanism for identifying a user or browser for subsequent requests to a server, needed because the HTTP protocol is stateless. This information is used to lookup state information for the user—for example, items in a shopping cart. PingFederate does not implement session persistence; it facilitates the communication of session information between systems that do.

Simple Object Access Protocol (SOAP)
Defines the use of XML and HTTP to access services, objects, and servers in a platform-independent manner.

Single Logout
The process of logging a user out of multiple “session participants” or sites where the user has started an SSO session.

Single Logout Return Service
The SAML implementation endpoint URL that returns logout requests.

Single Logout Service
The SAML implementation endpoint URL that receives logout requests for processing.

Single Sign-On (SSO)
The process of authenticating an identity (signing on) at one Web site (usually with a user ID and password) and then accessing resources secured by other domains without re-authenticating.

Single Sign-on Service
The SAML implementation endpoint URL that receives authentication requests for processing.

Source ID
A 20-byte sequence used to determine an IdP’s identity.

subject
A person, computer system, or application. In the SAML context, assertions make statements about subjects. See principal.

target URL
The SP’s protected resource; the end destination of an SSO event. See protected resource.
**transient name identifier**
A temporary ID used to preserve user anonymity while facilitating account linking.

**Uniform Resource Identifier**
Identifies an Internet resource with a string of characters conforming to a specified format.

**Uniform Resource Locator**
Identifies an Internet resource according to its Internet location.

**virtual server ID**
An optional unique identifier by which an identity federation deployment can be known to a specific connection partner.

**Web Services**
Nonbrowser-based, loosely coupled applications that provide modular, programming-language-independent access to specific functions and data across the Internet, via XML and standard protocols.
# List of Acronyms

<table>
<thead>
<tr>
<th>ACS</th>
<th>Assertion Consumer Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>API</td>
<td>Application Programmer Interface</td>
</tr>
<tr>
<td>ARS</td>
<td>Artifact Resolution Service</td>
</tr>
<tr>
<td>CA</td>
<td>Certificate Authority</td>
</tr>
<tr>
<td>CRL</td>
<td>Certificate Revocation List</td>
</tr>
<tr>
<td>CSR</td>
<td>Certificate Signing Request</td>
</tr>
<tr>
<td>DBMS</td>
<td>Database Management System</td>
</tr>
<tr>
<td>DMZ</td>
<td>Demilitarized Zone</td>
</tr>
<tr>
<td>DN</td>
<td>Distinguished Name (certificate identifier)</td>
</tr>
<tr>
<td>DNS</td>
<td>Domain Name System</td>
</tr>
<tr>
<td>EIM</td>
<td>Enterprise Identity Management</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
</tr>
<tr>
<td>HTTP</td>
<td>HyperText Transfer Protocol</td>
</tr>
<tr>
<td>HTTPS</td>
<td>Secure HyperText Transfer Protocol</td>
</tr>
<tr>
<td>IdM</td>
<td>Identity Management</td>
</tr>
<tr>
<td>IdP</td>
<td>Identity Provider</td>
</tr>
<tr>
<td>IP</td>
<td>Internet Protocol</td>
</tr>
<tr>
<td>J2SDK</td>
<td>Java 2 Software Development Kit</td>
</tr>
<tr>
<td>JDBC</td>
<td>Java Database Connectivity (JDBC)</td>
</tr>
<tr>
<td>LDAP</td>
<td>Lightweight Directory Access Protocol</td>
</tr>
<tr>
<td>O</td>
<td>Organization</td>
</tr>
<tr>
<td>OASIS</td>
<td>Organization for the Advancement of</td>
</tr>
<tr>
<td></td>
<td>Structured Information Standards</td>
</tr>
<tr>
<td>OCSP</td>
<td>Online Certificate Status Protocol</td>
</tr>
<tr>
<td>OU</td>
<td>Organizational Unit</td>
</tr>
<tr>
<td>PKI</td>
<td>Public Key Infrastructure</td>
</tr>
<tr>
<td>RDBMS</td>
<td>Relational Database Management System</td>
</tr>
<tr>
<td>RST</td>
<td><code>&lt;RequestSecurityToken&gt;</code> WS-Federation XML element</td>
</tr>
<tr>
<td>SAML</td>
<td>Security Assertion Markup Language</td>
</tr>
<tr>
<td>SaaS</td>
<td>Software as a Service</td>
</tr>
<tr>
<td>SDK</td>
<td>Software Development Kit</td>
</tr>
<tr>
<td>SP</td>
<td>Service Provider</td>
</tr>
<tr>
<td>SLO</td>
<td>Single Logout</td>
</tr>
<tr>
<td>SOA</td>
<td>service-oriented architecture</td>
</tr>
<tr>
<td>SOAP</td>
<td>Simple Object Access Protocol</td>
</tr>
<tr>
<td>SQL</td>
<td>Structured Query Language</td>
</tr>
<tr>
<td>SSL</td>
<td>Secure Sockets Layer</td>
</tr>
</tbody>
</table>
**List of Acronyms**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSL/TLS</td>
<td>Secure Sockets Layer/Transport Level Security</td>
</tr>
<tr>
<td>SSO</td>
<td>Single Sign-On</td>
</tr>
<tr>
<td>SSTC</td>
<td>Security Services Technical Committee (of OASIS)</td>
</tr>
<tr>
<td>TCP</td>
<td>Transmission Control Protocol</td>
</tr>
<tr>
<td>URI</td>
<td>Uniform Resource Identifier</td>
</tr>
<tr>
<td>URL</td>
<td>Uniform Resource Locator</td>
</tr>
<tr>
<td>XASP</td>
<td>X.509 Attribute Sharing Profile</td>
</tr>
<tr>
<td>XML</td>
<td>Extensible Markup Language</td>
</tr>
</tbody>
</table>
## Index

### A
- access control 36
- account linking 5
  - configuring 218
- account mapping 5
- accounts, administrator 36
- activation
  - for IdP connection 264
  - for SP connection 184
- adapters
  - commercial 8
  - configuring
    - IdP 104
    - SP 194
  - integration 7
  - mapping URLs to SP 199
- administrators, adding 37
- affiliations, SP 185
- application endpoints
  - IdP 110
  - SP 202
- archiving data 35
- artifact
  - lifetime, setting for IdP connections 242
  - lifetime, setting for SP connections 155
- Assertion Consumer Service URLs 150
- assertions
  - content 124
  - lifetime 121
  - mapping attributes to 130
- attribute authority (XASP), configuring 254
- attribute contract 9
  - default for SP connection 145
  - IdP connection 219
- attribute query
  - configuring for IdP connection 253
  - configuring for SP connection 159
  - mapping names 254
- attribute sources
  - custom 79
  - failover (for IdP) 131
  - for IdP 131
- attributes
  - mapping
    - about 5
    - for SP connection 141, 162
    - for user provisioning 251
  - masking in log files 10, 27
  - overview 8
  - sources for express provisioning 247
- audit logging 17
- Auto-Connect
  - about 19
  - activation (IdP connection) 267
  - activation (SP connection) 191
  - allowed IdP domains 268
  - allowed SP domains 192
  - configuring (as an IdP) 189
  - configuring (as an SP) 265
  - metadata lifetime 69
  - metadata signing 68

### B
- back-channel settings
  - for IdP connections 256
  - for SP connections 164
- backups, configuring 35
bindings
  allowable
    for IdP connection 241
    for SP connection 154
  configuring
    for IdP connection 215
    for SP connection 122
  SOAP for IdP connection 256
  SOAP for SP connection 164

C
certificate authority (CA) 87
certificates
  authority, verifying 15
  considerations 16
  digital signing 94
  expiration notification 57
  for metadata 33
  for SOAP authentication 16
  management 11
  revocation of 98
  selecting XML decryption (SP-to-IdP) 263
  selecting XML encryption (SP-to-IdP) 262
  SSL 89
  SSL client 92
  verifying 15
checklist, for federation 16
common domains 82
configuration
  archive 35
  connection list
    for IdP connection 208
    for SP connection 114
connections
  migrating 46
  connections, importing 299
cookies, common domain 82
cookies, for IdP Discovery 81
custom data stores
  filters (IdP connections) 233
  filters (SP connections) 141
  selecting fields (IdP connections) 233
  selecting fields (SP connections) 141

D
data archiving 35
data exchange
  automated 18
  for IdP connection 18
  for SP connection 18
data store 17
  description 10
  for attribute query profile 161
  introduction 70
  JDBC configuration 72
  LDAP configuration 76
  selecting
    for express provisioning 67, 248
    for IdP connection 224
    for SaaS provisioning 175
    for SP connection 133
  troubleshooting 313
database
  filter
    for IdP connection 227
    for SP connection 136
database filter
  for SP connection 136
decryption keys
  for IdP connections 263
  for SP connections 171
defederation 6
digital signatures
  about 11
  keys and certificates 94
  policy 13
digital signing
  for IdP connection 260
  for metadata 33
  for SP connection 167
directory service
  code example 304
  SOAP example 306
  SSO 303
discovery, IdP 81
domains
  allowed for IdP Auto-Connect 268
  allowed for SP Auto-Connect 192

E
e-mail
  addresses 57
  notifications 57
  server configuration 40
encryption, XML 158, 245
endpoints
  IdP application 110
  protocol, IdP 110
  protocol, SP 204
  SP application 202
entity ID 65
error message, SLO 109
event trigger, for provisioning 247

F
failover
  for data stores (IdP) 131
failsafe attribute source 144
federation
   checklist 16
   defederation 6
   ID 18
   roles, choosing 63
   URLs 65
filter, database
   for IdP connection 227
   for SP connection 136
filter, LDAP
   for IdP connection 231
   for SP connection 139

H
heartbeat, server
   checking via HTTP 297
host names, virtual 42

I
identity mapping
   about 5
   IdP configuration 124
   SP configuration 218
IdP
   adapters 104
   connections
      activation 264
      introduction 193
default URL 109
   SLO error message 109
IdP Discovery
   common domain service 82
   configuring 81
   cookies for 81
   local domain service 83
   selecting 63
IdP-initiated SLO
   configuring
      for IdP connection 237
      for SP connection 149
IdP-initiated SSO
   configuring
      for IdP connection 236
      for SP connection 147
importing
   metadata
      for IdP connection 212
importing connections 299
importing metadata
   for SP connection 118
installation
   license key 45
   troubleshooting 314
integration kits 7

J
JDBC configuration 72

K
keys
   for XML decryption (SP-to-IdP) 263
   for XML encryption (IdP-to-SP) 171
   keys and certificates
      digital signature 94
      SSL 92

L
LDAP
   configuration 76
   directory search
      for SP connection 138
   filter 139, 231
   pooling options 78
   SSL 77
   using SSL 77
license key, installing 45
licensing
   email address to notify 57
   expiration notification 57
Lifetime 69
Linux
   starting the server 26
   stopping the server 26
log files 27
logging
   administrator audit 28
   files 27
   modes 29
   transaction 29

M
main menu
   for IdP connection 206
   for SP connection 112
mapping
   adapters
      URLs to SP 199
   attributes
      configuring for SP connection 141, 162
      identity 5, 124, 218
masking attributes 10
masking attributes in logs 27
message
signing 11
validation 12, 16
metadata
exporting 30
exporting XML encryption certificates 33
importing
for IdP connection 212
for SP connection 118
lifetime for Auto-Connect 69
providing for Auto-Connect 20
signing 34
signing for Auto-Connect 68
use 18
migrating connections 46
monitoring
JMX 60
provisioning 60
server 59

N
name identifiers
SAML 2.0 124
WS-Federation 126
notifications
runtime 57

O
Object-Graph Navigation Language (OGNL), editing 312

P
password notification 36
passwords
changing 40
resetting 39
planning checklist 16
pooling options
database 74
pooling options
LDAP 78
profiles
configuring
for IdP connection 215
for SP connection 122
saving configuration
for IdP connection 159, 246
protocol endpoints
IdP 110
SP 204
protocols
choosing 63
troubleshooting 314
provisioning
enabling 215
event trigger for 247
mapping attributes for 251
provisioning, as SP
choosing data stores for 248
provisioning, SaaS
choosing internal data store 67
choosing source data stores for 175
pseudonyms
unique values for 108

R
requester mapping, for XASP 202
resetting passwords 39
roles, choosing IdP/SP 63
runtime
configuration 42
reporting 59

S
SAML
selecting 63
SAML 1.1
IdP connection steps 211
SP connection steps 117
SAML 2.0
IdP connection steps 210
SP connection steps 116
SDK 8
security
back channel 16
considerations 11
server
troubleshooting 315
server HTTP checking 297
server ID 16
server monitoring 59
server status verification 297
service URL
IdP, for WS-Fed 239
SP, for WS-Fed 152
session integration considerations 17
Signin 68
signing XML files 34
SLO service URLs 153
SNMP configuration 59
SOAP responder URL 18
SP
adapters 194
connections
activation 184
introduction 103
default URL 201
SP-initiated SLO, configuring
for IdP connection 237
for SP connection 149
SP-initiated SSO, configuring
for IdP connection 236
for SP connection 148
SSL 11
about 14
certificates 89
keys and certificates 92
using for LDAP 77
SSO directory service 303
standards
choosing 63
starting the server
Linux 26
Windows 26
stopping the server
Linux 26
Windows 26
summary
for IdP connection 264
for SP connection 184
synchronization
clock 17
provisioning 67
system administration (single or multiple users) 56

T
time synchronization 17
transaction logging 17, 29
transport security considerations 16
trigger, for provisioning 247
troubleshooting 313
data store 313
installation 314
protocols 314
server 315

U
unique IDs 16
unique values, for pseudonym creation 108
upgrading PingFederate 35
user management
setting 56
users
account management 36
adding 37
deactivating 38

V
validating messages 16
verifying certificates 15

virtual host names 42
virtual IDs 16
for IdP servers 114
for SP servers 208

W
Web Services
connection management 299
SSO Directory 303
Web templates 50
where clause
for IdP connection 227
for SP connection 136
WS-Federation
IdP connection steps 210
selecting 63
setting realm ID 65
SP connection steps 117
SP service URL 152, 239

X
X.509 certificates 11
XASP
requester mapping 202
XML encryption 11
about 15
exporting keys to metadata 33
IdP-to-SP 158
SP-to-IdP 245
XML files, signing 34