# Contents

<table>
<thead>
<tr>
<th>Chapter 1</th>
<th>Key Concepts</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>About This Manual</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Overview</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Intended Audience</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Text Conventions</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Other Documentation</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Connection Types</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>About WS-Trust STS</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Connection-Based Policy</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>IdP Configuration</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>SP Configuration</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Token Processors and Generators</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Bundled Token Plug-ins</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Commercial Token Plug-ins</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>WSC and WSP Support</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Client SDKs</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>WIF Clients</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>SSO Integration Kits and Adapters</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Bundled Adapters</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Commercial Adapters</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Software Development Kit</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Identity Mapping</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Account Linking</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Linking Permission and “Defederation”</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>SP Affiliations</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Account Mapping</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>About Attributes</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Contracts</td>
<td>12</td>
</tr>
<tr>
<td>Name Formats</td>
<td>13</td>
</tr>
<tr>
<td>STS Namespaces</td>
<td>13</td>
</tr>
<tr>
<td>Adapter Contracts</td>
<td>13</td>
</tr>
<tr>
<td>Extended Adapter Contract</td>
<td>14</td>
</tr>
<tr>
<td>STS Token Contracts</td>
<td>14</td>
</tr>
<tr>
<td>Extended Token Generator Contract</td>
<td>14</td>
</tr>
<tr>
<td>Data Stores</td>
<td>15</td>
</tr>
<tr>
<td>Attribute Masking</td>
<td>15</td>
</tr>
<tr>
<td>Certificates, SSL, and XML Encryption</td>
<td>16</td>
</tr>
<tr>
<td>Digital Signatures</td>
<td>16</td>
</tr>
<tr>
<td>Message Signing</td>
<td>16</td>
</tr>
<tr>
<td>Signature Validation</td>
<td>17</td>
</tr>
<tr>
<td>Certificate Validation</td>
<td>17</td>
</tr>
<tr>
<td>Digital Signing Policy Coordination</td>
<td>18</td>
</tr>
<tr>
<td>Secure Sockets Layer</td>
<td>19</td>
</tr>
<tr>
<td>SAML SSL/TLS Scenarios</td>
<td>19</td>
</tr>
<tr>
<td>Authentication</td>
<td>19</td>
</tr>
<tr>
<td>Verifying Trusted Certificates</td>
<td>20</td>
</tr>
<tr>
<td>XML Encryption</td>
<td>20</td>
</tr>
<tr>
<td>About PingFederate Express</td>
<td>20</td>
</tr>
<tr>
<td>Using Auto-Connect</td>
<td>21</td>
</tr>
<tr>
<td>Providing Metadata</td>
<td>21</td>
</tr>
<tr>
<td>Runtime Processing</td>
<td>22</td>
</tr>
<tr>
<td>Auto-Connect Security Model</td>
<td>23</td>
</tr>
<tr>
<td>User Provisioning</td>
<td>24</td>
</tr>
<tr>
<td>SaaS Provisioning</td>
<td>24</td>
</tr>
<tr>
<td>Express Provisioning</td>
<td>25</td>
</tr>
<tr>
<td>Federation Planning Checklist</td>
<td>26</td>
</tr>
<tr>
<td>Configuration Data Exchange</td>
<td>28</td>
</tr>
<tr>
<td>IdP to SP</td>
<td>28</td>
</tr>
<tr>
<td>SP to IdP</td>
<td>29</td>
</tr>
<tr>
<td>Mutual Settings Between Parties</td>
<td>29</td>
</tr>
<tr>
<td>Transaction Logging Modes</td>
<td>35</td>
</tr>
<tr>
<td>Security Audit Logging</td>
<td>36</td>
</tr>
<tr>
<td>Server Logging</td>
<td>38</td>
</tr>
<tr>
<td>Using the Server Log Filter</td>
<td>38</td>
</tr>
<tr>
<td>Writing Logs to Other Formats</td>
<td>40</td>
</tr>
<tr>
<td>Writing Audit or Server Logs to Databases</td>
<td>40</td>
</tr>
<tr>
<td>Writing Audit Logs to CEF</td>
<td>41</td>
</tr>
</tbody>
</table>

### Chapter 2

**System Administration** .................................................................................. 31

- Starting and Stopping PingFederate ......................................................... 32
- Managing Log Files                                                      .......... 32
- Administrator Audit Logging                                            | 34   |
- Runtime Transaction Logging                                             | 35   |
- Transaction Logging Modes                                              | 35   |
- Security Audit Logging                                                 | 36   |
- Server Logging                                                         | 38   |
- Using the Server Log Filter                                            | 38   |
- Writing Logs to Other Formats                                          | 40   |
- Writing Audit or Server Logs to Databases                             | 40   |
- Writing Audit Logs to CEF                                              | 41   |
# System Settings

- Exporting Metadata ................................................................. 42
- Defining Metadata Attribute Contracts ..................................... 43
- Choosing a Metadata Signing Key ............................................. 44
- XML Encryption Certificates ..................................................... 45
- Completing the Export ............................................................. 45
- Signing XML Files ...................................................................... 45
- Using the Configuration Archive Utility ...................................... 46
- Using the Archive Export Screen .............................................. 48
- Using the Archive Import Screen .............................................. 48
- Account Management ................................................................. 49
- Setting or Resetting Passwords ................................................ 52
- Changing Passwords .................................................................. 54
- Alternative Console Authentication .......................................... 55
- Using LDAP Authentication ....................................................... 55
- Using Certificate-Based Authentication ..................................... 55
- Managing Email Configuration .................................................. 56
- Using Virtual Host Names .......................................................... 58
- Changing Configuration Parameters ........................................ 58
- Console Configuration Push ....................................................... 61
- Installing a New License Key ..................................................... 61
- Automating Configuration Migration ........................................ 62
- Using the Migration Tool ............................................................ 63
- SaaS Provisioning CLI ................................................................. 66
- Customizing User-Facing Screens .............................................. 70
- Managing Server Settings .......................................................... 75
- Setting Administration Options ............................................... 76
- Entering System Information ...................................................... 77
- Configuring Runtime Notifications ......................................... 77
- Configuring Runtime Reporting ............................................... 78
- Using SNMP Monitoring ............................................................ 79
- Runtime Monitoring Using JMX ............................................... 80
- Managing Accounts ................................................................. 82
- Choosing Roles and Protocols ................................................ 83
- Specifying Federation Information .......................................... 85
- Setting System Options ............................................................. 87
- Configuring SaaS Provisioning Settings .................................. 88
- Configuring Auto-Connect Metadata Signing .......................... 89
- Configuring Auto-Connect Metadata Signing Lifetime .............. 90
- Saving and Editing Server Settings ........................................... 90
- Managing Data Stores ............................................................... 90
- Configuring a JDBC Database Connection .................................. 92
- Setting Advanced Options ........................................................ 94
- Defining an Account-Linking Database .................................... 95
- Configuring an LDAP Connection ............................................ 97
## Contents

<table>
<thead>
<tr>
<th>Chapter 4 Security Management</th>
<th>Chapter 5 Identity Provider SSO Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining an LDAP Type ..........</td>
<td>Application Integration Settings ..............</td>
</tr>
<tr>
<td>Setting Pooling Options ..........</td>
<td>Configuring IdP Adapters ......................</td>
</tr>
<tr>
<td>Configuring a Custom Data Store</td>
<td>Selecting an IdP Adapter Type ...............</td>
</tr>
<tr>
<td>Configuring a Custom Data Store Instance</td>
<td>Configuring an IdP Adapter ..................</td>
</tr>
<tr>
<td>Invoking Adapter Actions ..........</td>
<td>Invoking Adapter Actions .....................</td>
</tr>
<tr>
<td>Editing and Saving a Data Store</td>
<td>Extending an Adapter Contract ................</td>
</tr>
<tr>
<td>Configuring IdP Discovery ..........</td>
<td>Setting Pseudonym Values and Masking ..........</td>
</tr>
<tr>
<td>Standard IdP Discovery ..........</td>
<td>Choosing an Authentication Context ...........</td>
</tr>
<tr>
<td>Choosing Domain Cookie Settings</td>
<td>Editing and Saving Adapter Instances ..........</td>
</tr>
<tr>
<td>Configuring a Common Domain Service</td>
<td>Configuring a Default URL and Error Message</td>
</tr>
<tr>
<td>Configuring a Local Common Domain Server</td>
<td>Viewing Application Endpoints ..........</td>
</tr>
<tr>
<td>Editing and Saving the Configuration</td>
<td>Viewing Protocol Endpoints ..........</td>
</tr>
<tr>
<td>IdP Discovery Using a Persistent Cookie</td>
<td>Managing SP Connections ..................</td>
</tr>
<tr>
<td>Configuration ..................</td>
<td>Accessing Connections .......................</td>
</tr>
<tr>
<td>IdP-to-SP Adapter Mapping ..........</td>
<td>Using the Main Menu .........................</td>
</tr>
<tr>
<td>Managing Mappings .................</td>
<td>Using the Manage Connections Screen ..........</td>
</tr>
<tr>
<td>Choosing a Data Store (Optional)</td>
<td>Choosing a Connection Template .............</td>
</tr>
<tr>
<td>Adapter Contract Fulfillment ..........</td>
<td>Choosing a Connection Type ..................</td>
</tr>
<tr>
<td>Certificate Revocation Checking ..........</td>
<td>Choosing Connection Options ..............</td>
</tr>
<tr>
<td>Trusted Certificate Authorities</td>
<td>Importing Metadata .........................</td>
</tr>
<tr>
<td>SSL Server Certificates ..........</td>
<td>Configuring IdP Discovery ..................</td>
</tr>
<tr>
<td>SSL Client Keys &amp; Certificates</td>
<td>Standard IdP Discovery .....................</td>
</tr>
<tr>
<td>Digital Signing and Decryption Keys &amp; Certificates</td>
<td>Configuring a Local Common Domain Server</td>
</tr>
<tr>
<td>Application Authentication ..........</td>
<td>Configuring a Custom Data Store Instance</td>
</tr>
<tr>
<td>Certificate Revocation Checking</td>
<td>Configuring a Default URL and Error Message</td>
</tr>
<tr>
<td>Setting Pooling Options ..........</td>
<td>Viewing Application Endpoints .............</td>
</tr>
<tr>
<td>Configuring a Custom Data Store</td>
<td>Viewing Protocol Endpoints ........ .......</td>
</tr>
<tr>
<td>Configuring a Custom Data Store Instance</td>
<td>Managing SP Connections .............</td>
</tr>
<tr>
<td>Invoking Adapter Actions ..........</td>
<td>Accessing Connections .......................</td>
</tr>
<tr>
<td>Extending an Adapter Contract ..........</td>
<td>Using the Main Menu .........................</td>
</tr>
<tr>
<td>Setting Pseudonym Values and Masking</td>
<td>Using the Manage Connections Screen ..........</td>
</tr>
<tr>
<td>Choosing an Authentication Context</td>
<td>Choosing a Connection Template .............</td>
</tr>
<tr>
<td>Editing and Saving Adapter Instances</td>
<td>Choosing a Connection Type ..................</td>
</tr>
<tr>
<td>Configuring a Default URL and Error Message</td>
<td>Choosing Connection Options ............</td>
</tr>
<tr>
<td>Viewing Application Endpoints</td>
<td>Importing Metadata .........................</td>
</tr>
</tbody>
</table>
Importing a Verification Certificate .......................................................... 144
Viewing the Metadata Summary .......................................................... 144
General Information .............................................................................. 144
Configuring SaaS Provisioning ............................................................ 146
  Configuration Steps ............................................................................ 147
  Choosing Profiles (SAML 2.0) .......................................................... 148
  Setting an Assertion Lifetime .......................................................... 151
  Assertion Creation ............................................................................ 151
  Configuring Protocol Settings .......................................................... 174
  Editing and Saving SaaS Provisioning Configurations ....................... 184
  Configuring the Attribute Query Profile ........................................... 184
    Defining Retrievable Attributes ...................................................... 184
    Choosing a Data Store .................................................................. 185
    Configuring Data Store Lookup .................................................... 185
    Attribute Mapping Fulfillment ....................................................... 186
    Specifying Security Policy .......................................................... 187
    Editing and Saving Attribute Query Configurations ....................... 188
  Configuring Credentials .................................................................... 188
    Configuring Back-Channel Authentication ..................................... 189
    Configuring Digital Signature Settings ....................................... 191
    Configuring Signature Verification Settings .................................. 192
    Selecting an Encryption Certificate (SAML) .................................. 196
    Selecting a Decryption Key (SAML) .............................................. 197
    Editing and Saving Credential Configurations ............................... 198
  Configuring SaaS Provisioning .......................................................... 198
    Defining a Provisioning Target ...................................................... 198
    Managing SaaS Channels ............................................................. 199
    Specifying Channel Information .................................................. 201
    Identifying the Source Data Store ............................................... 201
    Modifying Source Settings ......................................................... 202
    Specifying a Source Location ....................................................... 204
    Mapping Attributes ..................................................................... 206
    Channel Activation and Summary ................................................. 209
  Connection Activation and Summary .............................................. 209
  Defining SP Affiliations .................................................................... 210
    Using the Manage Affiliations Screen ........................................... 211
    Importing Affiliation Metadata ................................................... 211
    Entering Affiliation Information ................................................... 212
    Managing Affiliation Membership ............................................... 212
    Using the Express Connection Template ..................................... 213
    Finishing an Express Connection ................................................. 214
  Configuring SP Auto-Connect .......................................................... 217
    Initial Setup .................................................................................. 217
    Setting an Assertion Lifetime ...................................................... 217
    Choosing a Signing Certificate ...................................................... 218
    Configuring Assertion Creation .................................................... 218
Chapter 7 WS-Trust STS Configuration ......................................................... 303

Server Settings .................................................................................. 303

Enabling the WS-Trust STS ................................................................. 303
Configuring STS Authentication ......................................................... 305
Selecting Authentication Methods .................................................... 305
Configuring Basic Authentication ....................................................... 306
Configuring Mutual SSL Authentication ............................................ 307
Using the WS-Trust STS Settings Summary Screen ......................... 309

IdP Configuration for STS ................................................................. 310
Configuring Token Processors ........................................................... 310
Selecting a Token Processor Type ..................................................... 311
Configuring a SAML Token Processor Instance ................................. 311
Extending a Processor Contract ......................................................... 313
Setting Attribute Masking ................................................................. 313
Editing and Saving Processor Instances .......................................... 313
Managing STS Request Parameters .................................................. 314
Creating a Request Contract ............................................................. 314

Configuring SP Connections for STS .................................................. 315
Configuring Protocol Settings ............................................................ 316
Setting a Token Lifetime .................................................................. 317
Configuring Token Creation .............................................................. 318

SP Configuration for STS ................................................................. 335
Configuring Token Generators .......................................................... 335
Selecting a Token Generator Type .................................................... 336
# Contents

- Configuring a Token Generator Instance .................................................. 336
- Extending a Generator Contract ............................................................... 337
- Editing and Saving Generator Instances .................................................. 338
- Configuring IdP Connections for STS ....................................................... 338
- Configuring Protocol Settings ................................................................. 339
- Configuring Token Generation ............................................................... 339
- Appendix A OpenToken Adapter Configuration ........................................ 355
  - Configuring the IdP OpenToken Adapter ................................................ 357
  - Configuring the SP OpenToken Adapter ............................................... 359
- Appendix B LDAP Adapter Configuration .................................................. 363
  - Configuring the IdP LDAP Adapter ........................................................ 365
  - Configuring the SP LDAP Adapter ....................................................... 368
- Appendix C Application Endpoints .......................................................... 371
  - IdP Endpoints ...................................................................................... 372
  - SP Endpoints ...................................................................................... 374
  - System-Services Endpoints ................................................................. 379
- Appendix D Web Service Interfaces ............................................................ 381
  - Connection Management Service .......................................................... 381
  - Exporting a Connection ....................................................................... 382
  - Exporting Manually ............................................................................. 382
  - Using the Connection Service ............................................................... 382
  - Importing Connections ....................................................................... 383
  - Code Sample ....................................................................................... 383
  - Deleting Connections ........................................................................ 384
  - Code Sample ....................................................................................... 384
  - Cluster Configuration Replication ......................................................... 384
  - Code Sample ....................................................................................... 384
  - Validation Disclaimer .......................................................................... 385
  - SSO Directory Service ........................................................................ 385
  - Code Example ..................................................................................... 386
  - SOAP Request and Response Example ................................................ 387
- Appendix E Using Attribute Mapping Expressions ...................................... 389
  - About OGNL ......................................................................................... 389
  - Enabling/Disabling Expressions ........................................................... 390
  - Using the OGNL Edit Screen ................................................................ 391
- Appendix F Troubleshooting ..................................................................... 393
  - Data Stores .......................................................................................... 393
  - Installation ............................................................................................ 394
  - Protocols ............................................................................................... 394
  - Server .................................................................................................. 394
  - Glossary ............................................................................................... 395
  - List of Acronyms .................................................................................. 401
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 Internet SSO, the WS-Trust Security Token Service (STS), 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 SSO Configuration”** — How to configure PingFederate to act as an Identity Provider (IdP) and establish connections to Service Providers.
- **Chapter 6, “Service Provider SSO Configuration”** — How to configure PingFederate to act as a Service Provider (SP) and establish connections to Identity Providers.
- **Chapter 7, “WS-Trust STS Configuration”** — How to configure PingFederate to act as a Security Token Service for Web Service Clients and Providers in either an IdP or SP environment.
- **Appendix A, “OpenToken Adapter Configuration”** — How to configure PingFederate to use the packaged OpenToken Adapter for interfacing with your Web applications.
Preface

- Appendix B, “LDAP Adapter Configuration” — How to configure PingFederate to use the packaged LDAP Authentication Adapter.
- 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 51).

Text Conventions

This document uses the text conventions identified below.

<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.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Started</td>
<td>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.</td>
</tr>
<tr>
<td>Integration Overview</td>
<td>A high-level description of options available for integrating identity-management systems and applications with PingFederate.</td>
</tr>
<tr>
<td>Server Clustering Guide</td>
<td>Describes how to deploy PingFederate in a cluster to increase throughput and availability.</td>
</tr>
<tr>
<td>SDK Developer's Guide</td>
<td>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.</td>
</tr>
<tr>
<td>Quick-Start Guide</td>
<td>Provides instructions for deploying a preconfigured PingFederate server to run with demonstration Web applications. Newcomers to PingFederate may wish to follow this Guide as a first step to establishing a simple SSO identity federation between two Web applications and to become familiar with PingFederate. The Guide is contained in a separate quick-start package available for download on the Ping Identity Web site.</td>
</tr>
<tr>
<td>Web Resources</td>
<td>Ping Identity continually updates its Knowledge Center (<a href="http://www.pingidentity.com/knowledge-center">www.pingidentity.com/knowledge-center</a>) with general and technical information in the form of white papers, demonstrations, webinars, and other resources.</td>
</tr>
</tbody>
</table>

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.

Note: If you encounter any difficulties with configuration or deployment, please try searching the Ping Identity Customer Portal (www.pingidentity.com/support-and-downloads/portal.cfm) under Answers.

PingFederate documents may include hypertext links to third-party 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.
This chapter provides background information and preparation to help you understand and use PingFederate:

- “Connection Types” below
- “About WS-Trust STS” on page 6
- “SSO Integration Kits and Adapters” on page 9
- “Identity Mapping” on page 10
- “About Attributes” on page 11
- “Certificates, SSL, and XML Encryption” on page 15
- “About PingFederate Express” on page 19
- “Using Auto-Connect” on page 20
- “User Provisioning” on page 22
- “Federation Planning Checklist” on page 24

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

Connection Types

PingFederate features an integrated administrative console for configuring two kinds of connections to identity-federation partners:

- Browser-based SSO – Also called Browser SSO in the administrative console, this term is often used to refer to standards-based secure Internet SSO, which generally depends on a user's browser to transport identity assertions and other messaging between partner endpoints (see the “Supported Standards” chapter in Getting Started).
Key Concepts

- **WS-Trust STS** – This type of connection employs the PingFederate Security Token Service (STS), which enables Web Service Client and Provider applications to extend SSO to identity-enabled Web Services at provider sites, using another set of standards (see the next section, “About WS-Trust STS”). These standards, including WS-Trust, do not rely on the user’s browser for message transport.

The two types of connections can be configured together for the same partner or independently (see “WS-Trust STS Configuration” on page 307).

**About WS-Trust STS**

The PingFederate WS-Trust STS allows organizations to extend SSO identity management to Web Services. (For information about WS-Trust and the role of an STS, see “Web Services Standards” in the “Supported Standards” chapter of Getting Started.)

The WS-Trust STS can be configured for partner connections independently or in conjunction with browser-based SSO for either an IdP or an SP deployment. The STS is bundled with separate plug-ins for standard SAML (Security Assertion Markup Language) token processing and generation (see “Token Processors and Generators” on page 6).

**Connection-Based Policy**

For both the IdP and SP roles, PingFederate employs a partner-connection configuration, which enables the association of Web Services authentication policies with federation partners. For STS processing, these policies define configurations for handling WS-Trust requests and transferring identity information between security domains (see “Web Services Standards” in the “Supported Standards” chapter of Getting Started).

**IdP Configuration**

In an IdP role, you use the administrative console to configure WS-Trust request-processing policy for your SP partner including:

- The type of SAML token to create—suitable for consumption by the intended Web Service Provider (WSP, at the SP site)—in response to an “Issue” request from a Web Service Client (WSC) application
- The mapping of attributes to include within the issued SAML token
- The key used to create a digital signature for the issued SAML token

**SP Configuration**

In an SP role, you use the administrative console to configure WS-Trust request-processing policy for your IdP partner including:

- Whether to validate the incoming SAML token only, or to validate the incoming token and also issue a local token
- The mapping of attributes to include in the locally issued token (when applicable)
- The certificate used to verify the digital signature for the incoming SAML token
- The key used to decrypt the incoming SAML token (when needed)
Token Processors and Generators

PingFederate provides support for a variety of security-token formats, through token processors and generators that plug into the PingFederate server. These plug-ins deploy similarly to browser-based SSO adapters (see “SSO Integration Kits and Adapters” on page 9).

For an IdP, token processors provide a mechanism through which PingFederate can validate an incoming token from a WSC and map attributes to be included in the issued SAML token.

For an SP, token generators provide a mechanism through which PingFederate can generate a local token based upon the incoming SAML token from an WSP and map attributes to be included in that token.

Only SAML 1.1 or 2.0 tokens are generated by PingFederate configured as an IdP for sending across trust boundaries to a federated SP partner. Likewise, only SAML tokens are accepted by PingFederate configured as an SP. Token plug-ins allow a modular approach for validating and producing the various token types used by different applications or systems within a conceptual trust domain. PingFederate provides bundled and separately available token plug-ins.

Token processors (for an IdP) and generators (for an SP) are configured globally in the administrative console; and at runtime, only a single instance of each token type can be active at one time.

Bundled Token Plug-ins

PingFederate is installed with token processors for an IdP configuration that accept and validate SAML 1.1 and 2.0 tokens (SAML tokens are issued on the IdP side via built-in browser-based SSO capabilities).

For an SP configuration, token generators are provided for issuing local SAML 1.1 or 2.0 tokens (incoming SAML tokens are validated, once again, by using built-in capabilities).

Commercial Token Plug-ins

Separately available token plug-ins include:

- Username – Accepts and validates Web Services Security (WSS) Username tokens against a password or an LDAP v3-compliant directory (PasswordText is currently the only supported password type)
  
  This token is based on the OASIS specification "Web Services Security Username Token Profile 1.0" (docs.oasis-open.org/wss/2004/01/oasis-200401-wss-username-token-profile-1.0.pdf)

- X.509 – Accepts and validates WSS X.509 tokens against the PingFederate trust store
  
  This token is based on the OASIS specification “Web Services Security X.509 Certificate Token Profile” (docs.oasis-open.org/wss/2004/01/oasis-200401-wss-x509-token-profile-1.0.pdf)

- Kerberos – Accepts and validates Kerberos binary tokens
  
  This token is based on the OASIS specification “Web Services Security Kerberos Token Profile 1.1” (www.oasis-open.org/committees/download.php/16788/wss-v1.1-spec-os-KerberosTokenProfile.pdf)

- CA SiteMinder – Accepts and validates SMSESSION binary tokens
Key Concepts

- Oracle Access Manager (formerly COREid) – Accepts and validates OBSSO binary tokens
- OpenToken – Accepts and validates an OpenToken at an IdP PingFederate and issues an OpenToken at the PingFederate SP

Ping Identity regularly develops token plug-ins to work with various authentication systems and leading identity management systems. Available plug-ins, together known as Token Translators, may be downloaded from the Ping Identity Web site (www.pingidentity.com/support-and-downloads).

WSC and WSP Support

Ping Identity provides the Java client Software Development Kit (SDK) for enabling Web Service applications (WS clients or providers) to interact with the PingFederate STS.

In addition, for WSC STS clients PingFederate provides built-in protocol support for Windows Identity Foundation (WIF) applications based on the Windows Communication Foundation (WCF) framework.

**Note:** The WIF framework includes WS-* protocol support and can interact natively with PingFederate.

Client SDK

The STS Java client SDK provides interfaces that create the WS-Trust Request Security Token (RST) and Request Security Token Response (RSTR) messaging to interact with the PingFederate STS endpoints. Using the SDK library, applications are not responsible for forming these WS-Trust protocol messages, and instead interact only with the tokens themselves.

The SDK is available for download at the Ping Identity Web site (www.pingidentity.com/support-and-downloads).

Windows Identity Foundation Clients

PingFederate natively supports STS clients using claims-based WIF technology. Claims-based federated identity for Web Services is a part of the WS-Trust standard that permits client applications to make access-policy decisions, when specifically categorized user attributes are sent in the security token (see “STS Namespaces” on page 13).

The PingFederate STS supports the following bindings in the .NET federated-security scenarios with WS-Trust:

- `WSFederationHttpBinding`
- `WS2007FederationHttpBinding`

Additionally, the PingFederate STS supports the following bindings for RST and RSTR interactions with .NET. (Support for these bindings is limited to the Username, x509, SAML 1.1, and SAML 2.0 token types.):

- `WSHttpBinding`
- `WS2007HttpBinding`

**Note:** For token types such as Kerberos, where customizing default bindings may be necessary, the PingFederate STS supports the use of customBinding.
For more information about bindings, see Microsoft’s System-Provided Bindings (msdn.microsoft.com/en-us/library/ms730879.aspx).

Developers can obtain PingFederate STS metadata to expedite configuring their applications (see “/pf/ws-trust_sts_metadata.ping” on page 382). PingFederate offers two varieties of metadata, which are often used together to arrive at functional WSC and WSP configurations:

- Federation Metadata, which contains details on the PingFederate public signing certificate and other information required to establish the trust relationship.
- Metadata Exchange, which contains connection details relating to the SP partner.


SSO 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 for browser-based SSO.

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 357)
- An LDAP Authentication Service, which interfaces with LDAP v3-compliant directories (see “LDAP Adapter Configuration” on page 365)

Commercial Adapters

Ping Identity regularly develops integration kits, including adapters, to work with applications and leading identity management systems. Available kits may be downloaded from the Ping Identity Web site (www.pingidentity.com/support-and-downloads).
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.

Identity Mapping

Identity mapping is at the core of identity federation. One of the primary goals of 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.)

For browser-based SSO, PingFederate enables two modes of identity mapping between domains:

- Account Linking
- Account Mapping

For WS-Trust STS, account mapping is used.

Account Linking

Under the standards, account linking can be used for browser-based SSO 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.

Tip: An SP PingFederate uses a default, Hypersonic database to handle account linking. You can use your own database instead, as needed. For more information, see “Defining an Account-Linking Database” on page 98.

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 380). 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 214). 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).

For browser-based SSO, 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.

### 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 (including SAML tokens for Web Services). 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 or STS token processor to populate an attribute contract directly or use these attributes to look up additional attributes in IdP data stores.
Key Concepts

- Define and enforce a set of required attributes needed by SP adapters or STS token generators to interface local systems or applications (see “Adapter Contracts” on page 13).
- Set up connections to local data stores (see “Data Stores” on page 14).
- Configure specific attribute sources and lookups—based on the data stores—and map attributes into IdP assertions or into SP adapters or token generators used to interface target applications (see “SSO Integration Kits and Adapters” on page 9 or “Token Processors and Generators” on page 6).
- Selectively mask attribute values recorded in transaction logs (see “Attribute Masking” on page 14).

Attribute Contracts

An attribute contract represents an agreement between an SP and an IdP about user attributes sent in a SAML assertion, either for browser-based SSO or WS-Trust STS. 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 14).

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 a combination of different data sources:

- The IdP adapter or STS token processor
- An IdP attribute source, which identifies the location of individual attributes in a data store
- Static text values for some attributes, or text values combined with variables
- Expressions (see “Using Attribute Mapping Expressions” on page 391)

For an SP, the attribute contract defines the attributes PingFederate expects in a SAML assertion. PingFederate can be configured to pass these attributes to the SP adapter or, for Web Services, to the SP token generator (see “Configuring SP Adapters” on page 226 or “Configuring Token Generators” on page 338). You can also use attributes to look up additional attributes in local data stores, which may be needed to start a user session or create a local security token for Web Services (see “Adapter Contracts” below or “STS Token Contracts” on page 14).

The attribute contract must contain the attribute SAML_SUBJECT, the primary information used to identify the user, unless you are using account linking for browser-based SSO. 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.
About Attributes

Name Formats
By agreement with an SP partner, an IdP may specify a format (email, for example) associated with the SAML_SUBJECT. The SP may require this information to facilitate handling of the format.

For SAML 2.0, the partner agreement may also include a requirement for the IdP to provide format specifications associated with other attributes.

For browser-based SSO connections, PingFederate provides a means for an IdP administrator to select from among standard subject and/or attribute formats, depending on the relevant SAML specifications.

Note: The designation of formats is not applicable to SP administrators. The information is simply available in the incoming assertion to an SP application that might need it for particular processing requirements.

For the WS-Trust IdP configuration, attribute-name formats cannot be specified. If needed, however, an administrator can use a special variable in the attribute contract to set the subject-name format (see “Defining an Attribute Contract” on page 323). (The same variable is also available for browser-based SSO attribute contracts, but the feature is deprecated.)

STS Namespaces
By agreement with an SP partner for a WS-Trust STS connection, an IdP may specify an XML namespace to be associated with an attribute (for example, to use claims-based authorization with WIF clients—see “Windows Identity Foundation Clients” on page 8). Namespaces can be specified only for attributes of a WS-Trust IdP configuration using SAML 1.1 as the default token type (see “Defining an Attribute Contract” on page 323).

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 “SSO Integration Kits and Adapters” on page 9 and “Configuring IdP Adapters” on page 130).

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 226.)

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 255).

Extended Adapter Contract
Adapter contracts are created when an adapter type is deployed with PingFederate. When developed, 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.

STS Token Contracts

Similar to an adapter contract for browser-based SSO, an STS token-processor or token-generator contract represents an agreement between the PingFederate server and an external application in the context of a Web Services transaction. In concert with the attribute contract between partners, token contracts specify the transfer of attributes, consisting of a list of case-sensitive attribute names.

On the IdP side of a federation, token-processor attributes are supplied to PingFederate (see “Token Processors and Generators” on page 6 and “Configuring Token Processors” on page 314).

On the SP side, token-generator contract attributes are those required by a token generator to pass identity information from the token to the Web Service client application. At least one token generator type is needed for each security domain. Then a token generator instance must be configured for each target application (see “Configuring Token Generators” on page 338. If several target applications are controlled by the same security context (for example, SiteMinder) and can receive the same set of attributes for the user, you would deploy a token generator type and configure a token generator instance for each target application (see “Mapping Token Generators” on page 344).

Extended Token Generator Contract

Token-generator contracts are created when a token-generator type is deployed with PingFederate. When developed, these token generators are “hard-wired” to look up or set a specific set of attributes. After deployment, your attribute requirements may change. To streamline adjustment of token-generator contracts, PingFederate allows an administrator to add additional attributes to the token-generator instance through the administrative console. These adjustments are called extended token-generator contracts.

Data Stores

PingFederate can be configured to use local data stores to supply attributes for either the IdP’s attribute contract, the SP’s adapter contract, or STS token contracts (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 93).

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 “Managing Log Files” on page 32). 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 93).
Certificates, SSL, and XML Encryption

- Retrieval of attributes from an IdP adapter or token processor (see “Setting Pseudonym Values and Masking” on page 133 and “Setting Attribute Masking” on page 317).

- SP-server processing of incoming attributes based on the SSO attribute contract, (see “Creating an Attribute Contract” on page 253).

  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 10).

- SP-server processing of incoming attributes in response to an Attribute Request under XASP (see “Specifying Security Policy” on page 291).

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

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**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 “Managing Log Files” on page 32).

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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 111).

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 (including STS tokens) 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. PingFederate provides a choice of signature encryption algorithms when a stronger algorithm is required.

To ensure the integrity of SAML messages or STS tokens, 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.
Chapter 1

Key Concepts

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 or in the Java runtime cacerts 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 117).

**Note:** Ping Identity recommends generating unique certificates for each connection, which limits exposure if the 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 or token. 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 will perform either of these checks during SSO or SLO processing for the following cases:

- Signature verification
- Validation of a client certificate used for authentication to PingFederate when the server is handling direct client requests
- Validation of the server SSL certificate when PingFederate is acting as the client making an HTTPS request to a separate server

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.

Ping Identity recommends generating unique certificates for each connection, which limits exposure if the private key becomes compromised.
Certificates, SSL, and XML Encryption

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 124).

**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 124). 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.

**Digital Signing Policy Coordination**

To coordinate digital signature policy, partners must first agree about whether they will sign SAML messages or tokens. In some cases, the protocol specifications require signatures—for example, all SAML STS tokens and all SSO 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 and enforced if specified for a partner connection.

If a digital-signing certificate is not issued by a trusted CA (that is, “self-signed”), then the signing partner must send the public-key certificate out-of-band (for example, via email) to the partner. The partner must import the certificate into PingFederate when configuring a connection to the signing partner for SSO/SLO or STS.

If the certificate is signed by a trusted CA and the signing partner chooses to embed the certificate in all signed messages, then the verifying partner can elect to use the embedded certificate for signature verification, after validating it against the Subject DN of the original certificate. The public-key certificate may or may not be sent out-of-band (just the Subject DN is required).

**Tip:** PingFederate can extract the Subject DN from the certificate, when available, during the signature-verification configuration.

The next section provides more information about the two alternative signature-verification trust models described above, from the standpoint of the verifying partner.

**Trust Models**

For validating digital signatures, PingFederate provides a selection of trust models in the administrative console for each partner connection, based on the certificate categories listed below. Note that for each trust model, PingFederate always verifies that the certificate is current and that the signature in the message can be verified using the certificate specified. Additional checks depend upon the trust model selected.
Chapter 1

Key Concepts

- Anchored Certificate
  In this case, certificates used for signature verification must be issued by a trusted CA, and the certificate chain must be verifiable recursively back to the root issuer. PingFederate validates the certificate (including recursive revocation checking, when enabled, back to the issuer) for all signed messages from the partner.
  In addition, when this option is selected, the incoming message must include the verification certificate for the signature. PingFederate uses that certificate to verify signatures from the partner if its Subject DN matches the partner's public certificate, as specified in the administrative console, and the issuer CA certificate is part of the trusted store. This feature provides a dynamic trust model that overcomes the problem of interrupting service to change out expired certificates.

- Unanchored Certificate
  When this option is chosen, incoming signatures are verified exclusively using a specific certificate imported for a connection into PingFederate (or a secondary, backup certificate when specified). The certificate may be self-signed or issued by a trusted CA. The certificate chain, if any, is not verified. However, revocation checking, when enabled, is performed up any existing chain as far as available.

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 and between the PingFederate STS and Web Service client or provider applications.

Authentication

Three methods of authentication, described below, are available for use with PingFederate for browser-based SSO to authenticate connection partners making SOAP requests. For SOAP authentication by STS clients, a separate option using either or both of the first two methods, may be configured (the third method, digital signing, is automatically required). 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 115).

**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 117).

**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 or contained in the Java runtime `cacerts` store.

**XML Encryption**

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

For SAML 2.0 SSO 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.

**About PingFederate Express**

PingFederate Express™ is a lightweight SAML 2.0 endpoint for federation partners who want a quick and easy way for an SP to process SAML assertions sent from an IdP partner who is using PingFederate. Available separately for specific platforms,
PingFederate Express provides a convenient, highly automated approach to configuring end-to-end basic Internet SSO between partners.

For an IdP, PingFederate provides a built-in template that an administrator uses to configure Express connections. The template automatically configures most settings (see “Using the Express Connection Template” on page 217). Once the configuration is complete, the administrator exports the connection metadata into a ZIP file.

On the SP side, a PingFederate Express administrator uses the ZIP as part of an automated installation procedure to configure the corresponding IdP connection in a matter of minutes.

**Using Auto-Connect**

PingFederate allows organizations to provide secure Internet SSO on the fly—that is, without the need for configuring partner-specific, browser-based SSO 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, to 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 221 or “Configuring IdP Auto-Connect” on page 302.

**Providing Metadata**

You enable Auto-Connect as part of Server Settings from the Main Menu (see “Choosing Roles and Protocols” on page 85). Once Auto-Connect is enabled and the 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 22) and “Configuring Auto-Connect Metadata Lifetime” on page 92).

**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:

![Auto-Connect Processing Flow](image)

**Figure 1:** Auto-Connect Processing Flow

**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 22), 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:

![Auto-Connect Security Model Diagram]

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 for browser-based SSO, 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.

**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).

![Figure 3: SaaS Provisioning Processing](image)

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 204). 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 99).

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 90).

**Tip:** Administrators have access to a command-line utility that can be used to monitor and make adjustments to the internal database as needed (see “SaaS Provisioning CLI” on page 68).

---

**Express Provisioning**

At an SP site, PingFederate can create and update local user accounts in an external LDAP directory or Microsoft SQL Server 2005 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 Connection Options” on page 243. For configuration information, see “User Provisioning” on page 277).

Federation Planning Checklist

An essential first step in establishing an identity federation involves discussions and agreements between you and your connection partners. The sections below comprise a partial checklist of items that should be coordinated before you deploy PingFederate.

**Tip:** For basic SSO deployment between partners, PingFederate Express virtually eliminates the need for much of the coordination described in this section, in addition to simplifying and expediting the configuration for both an IdP and an SP (see “About PingFederate Express” on page 19).

**Tip:** Extensive coordination and configuration may also be avoided by using Auto-Connect (see “Using Auto-Connect” on page 20).

**Standards and Specifications**

Choose which federation protocol(s) your deployment will support. For SAML SSO configurations, decide which profiles and bindings will be used. (See the “Supported Standards” chapter in *Getting Started*.)

**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 15.)

Also, if a stronger signature algorithm is required, determine what RSA algorithm will be used for signing. (The optional algorithm selection is available throughout the administrative console, where signing certificates are specified for various uses.)

**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.) Also, determine whether you want to adopt a trust model that uses embedded certificates (see “Trust Models” on page 17).
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 26).

With PingFederate, you define a unique ID for each supported protocol (see “Specifying Federation Information” on page 87). 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 146) or as an SP configuring an IdP connection (see “General Information” on page 244).

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 60).

Server Clock Synchronization

Ensure that both the SP and IdP server clocks are synchronized. SAML messages and STS tokens 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 14).

Web Application and Session Integration

Decide how PingFederate as an IdP receives subject identity information, either from an STS token or a user session.

For an SP, decide how PingFederate will forward user identity information to the destination Web application or system to start a session.

(See “SSO Integration Kits and Adapters” on page 9 and “Token Processors and Generators” on page 6.)

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 “Managing Log Files” on page 32.)

**Identity Mapping**

For browser-based SSO, 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 10).

**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 either SSO or Web Service access. (For more information, see “Attribute Contracts” on page 12.)

**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 your partner is also using PingFederate or supports standards permitting runtime metadata exchange, the process can be even simpler—see “Using Auto-Connect” on page 20. The process is also simplified and mostly automated using PingFederate Express—see “About PingFederate Express” 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 25).

- **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 25).
- **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 11).
- **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.
Chapter 1

Key Concepts
System Administration

This chapter describes general administrative functions for PingFederate, including:

- “Starting and Stopping PingFederate” on page 32
- “Managing Log Files” on page 32
- “Exporting Metadata” on page 42
- “Signing XML Files” on page 46
- “Using the Configuration Archive Utility” on page 47
- “Account Management” on page 50
- “Alternative Console Authentication” on page 54
- “Managing Email Configuration” on page 56
- “Using Virtual Host Names” on page 57
- “Changing Configuration Parameters” on page 58
- “Installing a New License Key” on page 60
- “Automating Configuration Migration” on page 61
- “SaaS Provisioning CLI” on page 65
- “Customizing User-Facing Screens” on page 69

**Note:** The information in this chapter is presented from the viewpoint of an administrative user with “Admin” permissions (see “Account Management” on page 50).
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 start-up sequence.

To shut down PingFederate:

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

(Unix/Linux)

To start PingFederate:

1. From a command prompt, change directories to `<pf_install>`\pingfederate\bin.
2. 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 start-up 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.

Managing Log Files

PingFederate generates these logs that document server events:

- `admin.log` — Records all actions performed by administrative-console users (see “Administrator Audit Logging” on page 34).
- `transaction.log` — Records individual identity-federation runtime transactions at specified levels of detail.

  The level of detail can be set globally or on a connection-by-connection basis (see “Runtime Transaction Logging” on page 35).
Managing Log Files

- **audit.log** — Records a selected, configurable subset of transaction log information plus additional details, intended for security-audit and regulatory compliance purposes (see “Security Audit Logging” on page 36).

- **server.log** — Records all PingFederate runtime and administrative server operational activity (see “Server Logging” on page 37).

  **Tip:** PingFederate provides a utility for filtering server log entries (see “Using the Server Log Filter” on page 38).

- **provisioner.log** — Records only SaaS Provisioning activity.

  (For information about SaaS Provisioning, see “SaaS Provisioning” on page 24.)

  **Tip:** PingFederate logs user attributes, when they are present, in the server log, the transaction log, and the audit log (if configured). When privacy is required for sensitive user attributes, you can configure PingFederate to obfuscate (mask) their values in these logs (see “Attribute Masking” on page 16).

The logs are stored by default in the `<pf_install>/pingfederate/log` directory. You can change the location to any network directory by using the runtime parameter `pf.log.dir` (see “Changing Configuration Parameters” on page 58).

**Note:** The server, provisioner, and audit logs may be output to alternate formats, including database tables (see “Writing Logs to Other Formats” on page 39).

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 start-up log, `boot.log`, is located in the directory: `pingfederate/server/default/log`

The PingFederate-generated logs are controlled through the `log4j.xml` file located in `pingfederate/server/default/conf/`. See comments in the file for more information. Any changes to the log configuration requires a server restart.

**Note:** By default, initial server requests are always recorded in the `server.log` with a tracking ID number, which is then used to identify subsequent, related transactions. This ID can be useful for debugging and support purposes to aggregate and analyze log entries tied to the same original request. The ID may also be added to the configuration for `transaction.log` or `audit.log`, or it may be removed from the `server.log <layout>` element in the `log4j.xml` file, as needed for performance considerations.
System Administration

Refer to the log4j open-source project for more information about logging levels and other configuration parameters (http://logging.apache.org/log4j/1.2/manual.html).

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 WARN. For the transaction.log and the audit.log, note that any setting below INFO turns logging off.

Important: The transaction.log, the admin.log, the audit.log and the provisioner.log files roll over at midnight each day. The system keeps all of the resulting historical log files. The transaction.log and audit.log can become quite large, depending on your production load and settings; you may want 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 log4j.xml file.)

The following sections provide more information about the primary logs:
- “Administrator Audit Logging” next
- “Runtime Transaction Logging” on page 35
- “Security Audit Logging” on page 36
- “Server Logging” on page 37
- “Writing Logs to Other Formats” on page 39

Administrator Audit Logging

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

Each entry in the 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 Save button in the administrative console is clicked.

A log entry is generated for each of the events listed below:
- Password change or reset
- Account activation or deactivation
- Role change
- Login attempt
- Explicit user logouts (no time-outs)
- Data store created, modified, or deleted
- Certificate management
- SP connection created, modified, or deleted
- IdP connection created, modified, or deleted
- URL-to-adapter mapping management
- SP Adapter created, modified, or deleted
Managing Log Files

- 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 the IdP or SP "SSO Configuration" chapters).

You also have the option of overriding transaction logging for all connections (to find this feature, click the relevant Manage All... link under IdP/SP Connections on the Main Menu). You may want 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>
Table 2: Transaction Logging Modes (Continued)

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>(Default) Logs summary information for each transaction message, including:</td>
</tr>
<tr>
<td></td>
<td>• Timestamp</td>
</tr>
<tr>
<td></td>
<td>• Hostname:Port</td>
</tr>
<tr>
<td></td>
<td>• Log Mode</td>
</tr>
<tr>
<td></td>
<td>• Connection ID</td>
</tr>
<tr>
<td></td>
<td>• SAML Status Code&gt; (for SAML responses only)</td>
</tr>
<tr>
<td></td>
<td>• Context</td>
</tr>
<tr>
<td></td>
<td>• Message Type</td>
</tr>
<tr>
<td></td>
<td>• SAML ID (for SAML messages only)</td>
</tr>
<tr>
<td></td>
<td>• Endpoint (for outbound messages only)</td>
</tr>
<tr>
<td></td>
<td>• Target URL (if SSO transaction)</td>
</tr>
<tr>
<td>Enhanced</td>
<td>Includes everything logged at the Standard level plus:</td>
</tr>
<tr>
<td></td>
<td>• SAML_SUBJECT*</td>
</tr>
<tr>
<td></td>
<td>• Binding</td>
</tr>
<tr>
<td></td>
<td>• Relay State (if available)</td>
</tr>
<tr>
<td></td>
<td>• Signature Policy</td>
</tr>
<tr>
<td></td>
<td>• Signature Status</td>
</tr>
<tr>
<td></td>
<td>• HTTP Request Parameters (outbound messages only)</td>
</tr>
<tr>
<td></td>
<td>* Only when available in a SAML assertion, a single.logout request, a Request Security Token Response (RSTR), or an</td>
</tr>
<tr>
<td></td>
<td>authentication request (AuthnRequest)</td>
</tr>
<tr>
<td>Full</td>
<td>Includes everything logged at the Enhanced level plus the complete XML message for every transaction.</td>
</tr>
</tbody>
</table>

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

Security Audit Logging

The PingFederate audit.log records a selected subset of transaction log information at runtime plus additional details, intended to facilitate security auditing and regulatory compliance. Elements of this log are described in the Table 3 and configurable in the log4j.xml file located in pingfederate/server/default/conf.

Note: The audit log records only SSO and SLO transactions. WS-Trust STS and SaaS provisioning transactions are not included.

Audit-log elements may be output to different formats, including databases. For information, see “Writing Logs to Other Formats” on page 39.

Table 3: Audit Log Configuration

<table>
<thead>
<tr>
<th>Item*</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%d</td>
<td>Transaction time.</td>
</tr>
</tbody>
</table>
### Table 3: Audit Log Configuration (Continued)

<table>
<thead>
<tr>
<th>Item*</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>adapterid</td>
<td>The ID of an adapter instance.</td>
</tr>
<tr>
<td>app</td>
<td>The target SP application (when available).</td>
</tr>
<tr>
<td>assertionid</td>
<td>The unique ID for the SAML assertion.</td>
</tr>
<tr>
<td>attributes</td>
<td>User attributes received (for an SP log) or sent (for an IdP log).</td>
</tr>
<tr>
<td>connectionid</td>
<td>The connection identifier associated with the transaction.</td>
</tr>
<tr>
<td>description</td>
<td>Description of an authentication failure (when information is available from an IdP adapter).</td>
</tr>
<tr>
<td>event</td>
<td>The type of transaction (e.g. SSO).</td>
</tr>
<tr>
<td>host</td>
<td>PingFederate host name or IP address.</td>
</tr>
<tr>
<td>initiator</td>
<td>(SAML 2.0 only) The federation role that initiated the SSO or SLO: SP or IDP.</td>
</tr>
<tr>
<td>inmessagetype</td>
<td>Incoming message type. Possible values are Request or Response.</td>
</tr>
<tr>
<td>inresponseto</td>
<td>The value of the InResponseTo attribute of an SSO or SLO Response.</td>
</tr>
<tr>
<td>inxmlmsg</td>
<td>The incoming XML message.</td>
</tr>
<tr>
<td>ip</td>
<td>Incoming IP address.</td>
</tr>
<tr>
<td>localuserid</td>
<td>The local ID used for the transaction (when account linking is enabled at the SP).</td>
</tr>
<tr>
<td>outxmlmsg</td>
<td>The outgoing XML message.</td>
</tr>
<tr>
<td>pfversion</td>
<td>The PingFederate version.</td>
</tr>
<tr>
<td>protocol</td>
<td>The associated identity protocol (e.g., SAML 2.0).</td>
</tr>
<tr>
<td>requestid</td>
<td>The ID of a request.</td>
</tr>
<tr>
<td>responseid</td>
<td>The ID of a response.</td>
</tr>
<tr>
<td>role</td>
<td>The partner’s role in the transaction.</td>
</tr>
<tr>
<td>status</td>
<td>Transaction success or failure.</td>
</tr>
<tr>
<td>subject</td>
<td>The subject of the transaction.</td>
</tr>
<tr>
<td>trackingid</td>
<td>The tracking ID used for debugging purposes in the server log (see the last “Note” on page 33 in the section “Managing Log Files”).</td>
</tr>
</tbody>
</table>

* Italicized items are not configured by default for this log but may be added. Refer to log4j.xml for syntax requirements.
Server Logging

The server log records all PingFederate runtime and administrative events, including status and error messages that can be used for troubleshooting. By default, the information is also sent to the terminal or command window running the PingFederate server.

**Note:** Alternatively, you can output the server log to a database (see “Writing Logs to Other Formats” on page 39).

To facilitate troubleshooting, administrators can use a filter utility to aggregate related events (see “Using the Server Log Filter” on page 38).

Elements of this log are described in the Table 4.

**Table 4: Server Log Components**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%d</td>
<td>Event date and time.</td>
</tr>
<tr>
<td>%X{trackingid}</td>
<td>The tracking ID for runtime events, used for debugging purposes (see the last “Note” on page 33 in the section “Managing Log Files”).</td>
</tr>
<tr>
<td>%p</td>
<td>Logging level.</td>
</tr>
<tr>
<td>%c</td>
<td>The Java class issuing the status or error message, when applicable.</td>
</tr>
<tr>
<td>%X{connectionid}</td>
<td>The partner ID associated with a runtime event.</td>
</tr>
<tr>
<td>%X{subject}</td>
<td>The SAML subject of the transaction, when applicable.</td>
</tr>
<tr>
<td>%m</td>
<td>Status or error message.</td>
</tr>
</tbody>
</table>

**Using the Server Log Filter**

PingFederate provides a utility that administrators can use to filter server logs. The tool, `logfilter.bat|sh`, is located in the `<pf_install>/pingfederate/bin` directory.

By default the utility sorts through all the server logs in the log directory, or you can move or copy one or more files to a different directory that can be specified as an input parameter.

The log filter returns lists of log entries based on either:

- Entity ID and Subject
- Tracking ID
- Session Cross-reference ID
Table 5 describes the utility’s command options. Table 6 describes optional parameters available for all of the commands.

### Table 5: Server Log Filter Command Options

<table>
<thead>
<tr>
<th>Command Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-- entityid &lt;entity-id&gt;</td>
<td>These two commands must be used together and return a list of transactions for the specified federation partner’s entity ID and transaction subject.</td>
</tr>
<tr>
<td>-- subject &lt;subject&gt;</td>
<td></td>
</tr>
<tr>
<td>-- trackingid &lt;tracking_id&gt;</td>
<td>This command returns a list of transactions with the same tracking ID.</td>
</tr>
</tbody>
</table>
| -- sessionxrefid <session_xref_id> | This command returns a list of transactions for an ID assigned by PingFederate to associate different transactions according to the user session under which they occurred. The value of <session_xref_id> may be the value of any of the following transaction tags in the target server log(s):  
  - Artifact  
  - Session Index  
  - Assertion ID |

### Table 6: Server Log Filter Parameters*

<table>
<thead>
<tr>
<th>Parameter*</th>
<th>Description</th>
</tr>
</thead>
</table>
| -- logsdir <log-files-directory> | Full or relative path to source directory for the log(s).  
  Default: all server.log files in pf.log.dir  
  The installed location is:  
  <pf_install>/pingfederate/log  
  (For information about changing the default location, see “Changing Configuration Parameters” on page 58.) |
| -- outputfile <output-file> | Output path and file for the returned list.  
  Default: pf.log.dir/logfilter_output.log  
  The installed location is:  
  <pf_install>/pingfederate/log  
  (For information about changing the default location, see “Changing Configuration Parameters” on page 58.) |
| -- outputtoconsole | Returns list to the command console rather than to a file. |

*Optional for all commands.

The log filter creates its own log file, logfilter.log, located in the log directory. You can control settings for this log, as needed, in the file logfilter.log4j.properties, located in the bin directory.
Writing Logs to Other Formats

PingFederate provides the option of writing the audit, server, and provisioner logs to commonly used databases (with failover to file logging).

For the audit log, you may choose instead to write the information to the ArcSight Common Event Format (see “Writing Audit Logs to CEF” on page 41).

Writing Logs to Databases

You can enable database logging for the audit log, the server log, and the provisioner log in the `log4j.xml` file in `pingfederate/server/default/conf`. Scripts for selected database types are provided to create the necessary table(s).

To configure database logging:

1. In `log4j.xml`, uncomment one of the preset log-appender configurations listed below (or one from each list to configure all logs):

   For the server log:
   - ServerLogToOracleDB (for Oracle)
   - ServerLogToSQLServerDB (for Microsoft SQL Server)
   - ServerLogToMySQLDB (for MySQL)

   For the provisioner log:
   - ProvisionerLogToOracleDB (for Oracle)
   - ProvisionerLogToSQLServerDB (for Microsoft SQL Server)
   - ProvisionerLogToMySQLDB (for MySQL)

   For the audit log:
   - SecurityAuditToOracleDB (for Oracle)
   - SecurityAuditToSQLServerDB (for Microsoft SQL Server)
   - SecurityAuditToMySQLDB (for MySQL)

   **Note:** Each appender is followed by a related appender that creates a running *failover.log* file in the log directory. The failover appender must also be enabled (uncommented).

2. Replace placeholder parameter values for the appender(s).

   The parameter values provide access to the database. We recommend that they be tested and validated prior to production deployment.

   **Note:** See the NOTES in `log4j.xml` above the appender for more details.
3. Uncomment the appender reference in the associated logger element(s), as described in the appender NOTES:

For the server log:
Uncomment the appender reference located under Set up the Root Logger near the end of the log4j.xml configuration file.

For the provisioner log:
Uncomment the appender reference located under Limit categories near the end of the log4j.xml configuration file.

For the audit log:
Uncomment the appender in one or both of the following loggers located under Limit categories in the log4j.xml configuration file:
• org.sourceid.websso.profiles.sp.SpAuditLogger
• org.sourceid.websso.profiles.idp.IdpAuditLogger

Note: As indicated in the IMPORTANT comment for the loggers, you must remove the existing appender reference(s).

4. (Optional) For the audit log, you can configure elements for database logging in the ConversionPattern appender parameter, as needed (see Table 3 on page 36).

To create database tables:
> Scripts to create database tables for each of the three databases are provided for the audit, server log, and provisioner logs. The scripts are located in the directory:

pingfederate/server/default/conf/log4j/sql-scripts

Note: The scripts are written to handle the default list of elements for the relevant database log-appender in log4j.xml. Any changes to the list requires corresponding changes to the SQL table-creation script (or to the table itself if it is already created).

Writing Audit Logs to CEF

The Common Event Format (CEF) is an open logging standard developed by the security-management company ArcSight. PingFederate provides an option of writing audit-log elements at runtime to a syslog receiver for parsing and analysis via ArcSight tools. Alternatively, you can write CEF to a flat file; however, using syslog, when available, is recommended.

You can enable this capability in the log4j.xml file (in pingfederate/server/default/conf).

Note: PingFederate is certified with ArcSight for interoperability using the default elements defined in log4j.xml. Any additions to these elements may render your CEF logging incompatible with ArcSight.

Tip: You can obfuscate the password used to access the database by running either obfuscate.sh or obfuscate.bat, located in pingfederate/bin. Use the actual password as an argument and copy the entire result into the value for the password parameter in log4j.xml.

Note: As indicated in the IMPORTANT comment for the loggers, you must remove the existing appender reference(s).
Chapter 2
System Administration

For more information about CEF, see the ArcSight Web site:

http://www.arcsight.com/solutions/solutions-cef

To configure CEF logging:

1. In log4j.xml, uncomment one of the preset log-appender configurations:
   - SecurityAuditToCEFSyslog
   - SecurityAuditToCEFFile

Replace the placeholder parameter value for the syslog host (if you are configuring the syslog appender), and uncomment the appender reference in one or both of the indicated logger elements (for either appender).

Note: See the NOTES in log4j.xml above the appender for more details. Also notice the IMPORTANT comment for the loggers (org.sourceforge.idp.profiles.idp.IdpAuditLogger and/or org.sourceforge.idp.profiles.sp.SpAuditLogger): for syslog implementations, you must remove the existing appender reference.

Exporting Metadata

For SAML deployments PingFederate supports the export and import of metadata files, which federation partners can use to expedite their configuration. You can export metadata for any connection (or select certain nonconnection-specific metadata for export) 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 237 or “Managing SP Connections” on page 137).

Tip: Connection-metadata export is also available from the Manage Connections screens, which can be reached from the Main Menu via the Manage All ... link under either SP Connections or IdP Connections.

Tip: IdP administrators can use the Manage Connections screen to export metadata for PingFederate Express SP connections in a one-step process (see “Using the Manage Connections Screen” on page 140). (For information about Express connections, see “About PingFederate Express” on page 21.)

To reach the Metadata Export task:

- Click 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.

   For more information, see “Choosing the Metadata Export Mode” on page 43.

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 Metadata” on page 45.

   For SP connections using PingFederate Express, this screen does not appear; Express metadata is not signed.

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.

   For more information, see “Choosing the Metadata Export Mode” on page 43.

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 a Metadata Attribute Contract” on page 44.
   - “Including a Signing Key” on page 44.
   - “Signing Metadata” on page 45.
   - “XML Encryption Certificates” on page 46.

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 Metadata” on page 45.

6. On the Export & Summary screen click the Export button, save the file, and then click Done.
Chapter 2  
System Administration  

Choosing the Metadata Export Mode  

If you want to export metadata for a specific connection, keep that default selection on the Metadata Mode screen. Or you may choose instead to export metadata that is not bound to specific connection endpoints at your site.

Note: If the PingFederate secondary SSL port is configured and you want to use it for the SOAP channel, select the checkbox on the screen. If client-certificate authentication is configured for the SOAP channel, the secondary port is required and you must check this box. (For more information, see the description of the runtime property \textit{pf.secondary.https.port} in Table 8 on page 58.)

Defining a Metadata Attribute Contract  

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 13.

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.
Including a Signing Key

In a 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 117.

To export your public signature verification key:

- Select the certificate from the drop-down list and click Next.

Signing Metadata

Choose your organizational signing certificate on the Metadata Signing screen. The metadata XML file must be signed using a certificate trusted by your federation partner.

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 117).
2. (Optional) If you have agreed to send your public key with the SAML message, select the checkbox to include the certificate.
3. (Optional) Select the Signing Algorithm from the drop-down list.
   The default selection, RSA SHA1, is the most commonly used. Make a different selection only if you and your connection partner have agreed to use a stronger algorithm.

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 243.
- As an IdP configuring an SP connection, see “Importing Metadata” on page 145.
Using the Configuration Archive Utility

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 Utility

PingFederate's archive utility allows you to export the current administrative-console configuration to a ZIP file and to import an existing archive for immediate deployment into a running PingFederate server.

Tip: A time-stamped configuration archive is created as a backup automatically every time you log on to the administrative console and before an existing archive is imported. The archives are stored in pingfederate/server/default/data/archive.

Tip: PingFederate includes a separate command-line utility that provides a finer level of control over configuration migration, as well as providing for scripting of routine configuration-management tasks (see “Automating Configuration Migration” on page 61).
Configuration archives can be used as backups or to transfer data from one PingFederate server to another, including migration to a new PingFederate release.

**Important:** Draft connections in archives are not imported. Complete any unfinished partner connections if you wish to include them in a full backup archive or in an archive to be used for configuration migration.

**Note:** The archive utility is intended for administrative-console configuration data only. It does not include error-page or other end-user HTML templates (see “Customizing User-Facing Screens” on page 69), nor any files under `<pf_install>/server/default/conf`. If any changes have been made to the default templates or configuration files, you must copy them over to new installations or other instances of PingFederate (assuming the changes are applicable).

The archive also does not capture license files, adapter JAR files, database drivers, or any other plug-ins; these also must be copied into any new instance of PingFederate. The import utility checks for and reports on any missing components (see “Using the Archive Import Screen,” next).

### To reach this screen:

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

### To create an archive:

1. On the Select Import/Export screen, ensure Export is selected and click **Next**.
2. On the Export screen, click **Export**, save the download to your file system, and click **Done**.

### To import and deploy an archive:

- On the Select Import/Export screen, click Import and then **Next**.

  See the next section, “Using the Archive Import Screen,” for more information.

**Note:** Alternatively, you can deploy an archive manually, using the procedure below.
Using the Configuration Archive Utility

Caution: Deploying a configuration archive, either manually or by using the administrative console, always overwrites all existing configuration data.

To deploy an archive manually:

1. Copy a previously stored archive 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 again renamed with a timestamp after a moment and the data automatically deploys, replacing the current UI configuration. Restarting the server is not required.
3. Consult the PingFederate server start-up window, or the server log file, for any messages concerning missing plug-in components or other errors.

Note: A data archive imported via the `drop-in-deployer` directory is deployed by default regardless of errors, unlike the default behavior using the Import screen.

Using the Archive Import Screen

When you initiate deployment of a configuration archive using the Import screen, PingFederate displays error messages if there are any missing plug-in components (such as adapters, database drivers, or token translators) on which the archive depends, or any mismatches of PingFederate licensing authorization.

<table>
<thead>
<tr>
<th>Configuring My Server</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><strong>Configuration Archive</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Select Import/Export</strong></td>
<td></td>
<td><strong>Import</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Import and deploy a ZIP file containing administrative-console configuration data (overwrites the current configuration).</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Filename</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Force Import</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Import</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If there are missing components or license inconsistencies, the import is halted by default to allow you to install the necessary components or license. However, you can choose to force the deployment and then install the necessary files later.

Note: Installation of any missing database drivers or other third-party libraries will require a PingFederate server restart.

To deploy a configuration archive:

1. On the Import screen, click **Browse** to locate the required ZIP file.
2. (Optional) Select Force Import to deploy the archive regardless of whether dependencies are detected.

**Important:** If you make this selection, consult the server start-up window or the server log for any errors.

3. Click **Import**.

4. Read the on-screen caution statement and indicate whether you want to continue.

   When you click **Yes**, a message is displayed indicating the deployment result.

5. Click **Done**.

### Account Management

PingFederate provides a choice of single- or multi-user system administration (see “Setting Administration Options” on page 78).

**Note:** This choice is not presented if you are using your network’s LDAP user store or client certificates for authentication to the PingFederate administrative console (see “Alternative Console Authentication” on page 54).

If you choose native multi-user administration or if you are using alternative authentication, PingFederate provides role-based access control, as shown in Table 7. For native multi-user administration, you can choose to use email for password setting and resetting notifications.

<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 58).

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

**Note:** For security, after three failed logon attempts from the same location within a short time period, the administrative console will temporarily lock out further attempts by the same user. The user must wait one minute to try again.

To reach the Account Management screen:

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

**Note:** If you are using alternative PingFederate authentication, the **Account Management** configuration is not available. Set PingFederate-specific permissions for users in configuration files located in `<pf_install>/pingfederate/bin` (see “Alternative Console Authentication” on page 54).

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 54).

**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 52).

**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 7 on page 50).

Clicking the Auditor button deactivates other permission selections.

**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. Select 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 56).

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.
   Or:
   - 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 50).
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** (plus confirmation) and click **Save**.

   Passwords must be at least six characters long and contain at least one upper-case 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.

Alternative Console Authentication

You can configure PingFederate to use either your network's LDAP user-data store or client certificates for authentication to the administrative console, as an alternative to using PingFederate's own internal data store. You can configure either of these alternatives at any time.

Note that most user-management functions are handled outside the scope of the PingFederate administrative console when either LDAP or certificate-based authentication is enabled. Authorization levels, however, as described in “Account Management” on page 50, must be assigned in PingFederate configuration files.
Using LDAP Authentication

The LDAP authentication setup is available via configuration files in the `<pf_install>/pingfederate/bin` directory.

To configure PingFederate to use network LDAP authentication:

1. In the `pingfederate/bin/run.properties` file, change the value of `pf.console.authentication` as shown below:
   ```
   pf.console.authentication=LDAP
   ```
   
   **Note:** You can restore internal user-management control at any time by returning the value to `native` and restarting the PingFederate server.

2. In the `pingfederate/bin/ldap.properties` file, change property values as needed for your LDAP network configuration.
   See the comments in the file for instructions and additional information.
   
   **Important:** Be sure to assign LDAP users or designated LDAP groups (or both) to at least one of the PingFederate administrative roles as indicated in the properties file. For information about permissions attached to the PingFederate roles, see “Account Management” on page 50.

Using Certificate-Based Authentication

To enable client-certificate authentication, PingFederate administrative users must have imported into their Web browsers an X.509 key and certificate suitable for user authentication. In addition, the corresponding root CA certificate(s) must be contained in the Java runtime or the PingFederate trusted store (see “Trusted Certificate Authorities” on page 112).

Other setup steps, including designating user permissions, are required via configuration files in the `<pf_install>/pingfederate/bin` directory.

To enable certificate-based PingFederate console authentication:

1. If not already done, import the necessary client key and certificate into the Web browser used to access PingFederate.
   Refer to the browser's documentation, as needed, for instructions.

2. Log on normally (using username and password) to the PingFederate console as a user with permissions that include the role Crypto Admin.
   The default administrator includes this role. (For more information, see “Account Management” on page 50.)

3. Ensure the client-certificate's root CA and any intermediate CA certificates are contained in the trusted store (either for the Java runtime or PingFederate, or both).
   To import a certificate, click **Trusted CAs** in the Security section under My Server.

   **Tip:** You may wish to click the Serial number and copy the Issuer DN to use at Step 5.
4. In the `pingfederate/bin/run.properties` file, change the value of `pf.console.authentication` as shown below:
   
   ```
   pf.console.authentication=cert
   ```

5. In the `pingfederate/bin/cert_auth.properties` file, enter the Issuer DN for the client certificate as a value for the property:
   
   ```
   rootca.issuer.x
   ```
   
   where \( x \) is a sequential number starting at 1 (see the properties file for more information).

   If you copied the Issuer DN at Step 3, paste this value.

6. Repeat the previous step for any additional CAs as needed.

7. Enter the certificate user's Subject DN for the applicable PingFederate permission role(s), as described in the properties file.

   See “Account Management” on page 50 for more information about PingFederate permissions.

8. Repeat the previous step for all users as needed.

   **Note:** Other settings in the properties file are used to display the user’s ID (the Subject DN) in abbreviated form in the administrative console.

9. Restart the PingFederate server (see “Starting and Stopping PingFederate” on page 32).

### 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 50 and “Configuring Runtime Notifications” on page 79).
To configure access to your email server:

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

### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>“From” Address</td>
<td>The email address that appears in the “From” header line in email messages generated by PingFederate. The address must be in valid format but need not be set up on your system.</td>
</tr>
<tr>
<td>Email Server</td>
<td>The IP address or hostname of your email server.</td>
</tr>
<tr>
<td>SMTP Port</td>
<td>The SMTP port on your email server (default: 25).</td>
</tr>
<tr>
<td>Username</td>
<td>Authorized email username.</td>
</tr>
<tr>
<td>Password</td>
<td>User password.</td>
</tr>
<tr>
<td>Confirm Password</td>
<td>Re-entered password.</td>
</tr>
<tr>
<td>Test Address</td>
<td>(Optional) An email address where you want to send a test message.</td>
</tr>
</tbody>
</table>

**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 79 or “Account Management” on page 50).
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 27). 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 8 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 PingFederate is deployed in a cluster, 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>
<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 Options” on page 78). 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 (see “Alternative Console Authentication” on page 54).</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>
<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. <strong>Caution:</strong> This port should remain disabled in production if your deployment configuration directly exposes the PingFederate server to the Internet.</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>
</tbody>
</table>
### Table 8: PingFederate Configuration Properties (Continued)

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>pf.secondary.https.port</td>
<td>Defines a secondary HTTPS port that can be used, for example, with SOAP or artifact SAML bindings or for WS-Trust STS calls. To use this port, change the placeholder value to the port number you want to use.</td>
</tr>
<tr>
<td></td>
<td><strong>Important:</strong> If you are using mutual SSL/TLS for either WS-Trust STS authentication or for SAML back-channel authentication, you must use this port for security reasons (or use a similarly configured new listener, with either <code>WantClientAuth</code> or <code>NeedClientAuth</code> set to true—see “Note” at the end of this table).</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 80). Use for deployments where multiple network interfaces are installed on the machine running PingFederate.</td>
</tr>
<tr>
<td>pf.log.dir</td>
<td>Network path to the output location of log files. The default is: <code>&lt;pf_install&gt;/pingfederate/log</code></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 24). Also used to enable provisioning failover (see the PingFederate <em>Server Clustering Guide</em>).</td>
</tr>
</tbody>
</table>

**Note:** Additional configuration of the listener ports (including adding new listeners) is available via the `<pf_install>/pingfederate/server/default/deploy/jetty.sar/META-INF/jboss-service.xml` file. For example, options include `WantClientAuth` and `NeedClientAuth` flags, which indicate that a client certificate is either requested or required, respectively, for mutual SSL/TLS. (For the preconfigured SSL secondary port, `WantClientAuth` is set to true by default; `NeedClientAuth` is set to false.)
Installing a New License Key

If your license key is going to expire or has expired recently, you can install a new one without interrupting services.

**Tip:** You can configure the server to send administrators email warnings regarding the license status (see “Configuring Runtime Notifications” on page 79).

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

**To request a new license key:**
- Go to the Ping Identity Web-site licensing page (www.pingidentity.com/support/licensing).

After you receive the new license key, you can either install it manually or by using the PingFederate administrative console, with or without a previous license installed.

**Tip:** When you use the administrative console and a previous license exists, PingFederate compares the new license with the existing one and warns of any potential problems (or aborts the import if the license is invalid for any reason). After the license key is imported, the previous license file is saved with a timestamp in the filename.

**To install a license key manually:**
- Copy the license file as `pingfederate.lic` file to:
  `<pf_install>/pingfederate/server/default/conf`

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

**To install a license key using the administrative console (when no previous license is configured):**
1. Start PingFederate and access the administrative console (see “Starting and Stopping PingFederate” on page 32).
2. On the Import License screen, click **Browse** to select the file and then click **Import**.
   - The license file is verified for use with the current instance of PingFederate and copied as `pingfederate.lic` to:
     `<pf_install>/pingfederate/server/default/conf`

**To install a replacement license key from the Main Menu:**
1. Click **License Management** under Administrative Functions.
2. On the License Management screen, click **Browse** to select the file and then click **Import**.

No filename restrictions are imposed for importing the file; it is renamed before installation if necessary. The previous `pingfederate.lic` license file is renamed with a timestamp in the configuration directory:

```
<pf_install>/pingfederate/server/default/conf
```

If the new license does not include support for features covered by your existing license, or if there is some other potential problem with the license, you will be advised and prompted on whether to continue.

---

**Note:** If the license is for the wrong version of PingFederate or is found to be invalid for some other reason, PingFederate displays the error(s) and reverts to the previous license.

---

### Automating Configuration Migration

PingFederate provides a configuration-migration tool that can be used for scripting the transfer of administrative-console configurations and configuration property files from one PingFederate server to another—for example, from a test environment to production. The tool may also be used to manage certificates for the target server.

The command-line utility, `configcopy` in `<pf_install>/pingfederate/bin`, uses PingFederate’s built-in Connection Management Web Service in conjunction with an internal Web Service to export and import connections and other configurations, and to obtain lists (see “Connection Management Service” on page 383).

---

**Important:** The Connection Management Service must be activated for both the source and target servers before the configcopy tool can be used (see “Application Authentication” on page 122.)

---

**Caution:** For security reasons, the Management Service should be disabled whenever it is not in use.

### Administrative Console Migration

For migrating data configured with the source PingFederate server’s administrative console, this tool performs these overall processing steps:

1. Retrieves specified connection and/or other configuration data (XML) from a source PingFederate server.

2. Modifies the configuration with any changes required for the target environment, according to settings in one or more properties files and/or command-line arguments.

3. Imports the updated configuration into the PingFederate target server.

The configcopy tool can perform these functions in real time, from server to server, or by using an intermediate file. The latter option is useful when both the source and
target PingFederate servers are either not running at the same time or not accessible from the same operating-system command window.

Important: For one-time configuration transfers from one version of PingFederate to a newer version, we recommend using a complete configuration archive, either with configcopy archive export/import commands or manually (see “Using the Configuration Archive Utility” on page 47). Other configcopy commands are not supported for this purpose.

Operational capabilities include:

- Listing of source partner connections, adapter or STS token-translator instances, SaaS-provisioning channels, or data-store connections.
  List commands include optional filter settings, when applicable.
- Copying one or more partner connections, SaaS-provisioning channels, or instances of adapters or token translators.
- Copying one or more data-store connections.
- Copying server settings.
- Exporting and importing full configuration archives.

Configuration File Copying

The configcopy tool supports copying configuration files containing runtime properties (including those needed for server clustering) that may have been manually customized for the source configuration and need to be migrated. The file-copy command may also be used to copy the PingFederate internal, hypersonic database when needed.

Certificate Management

Administrators may use the configcopy tool to perform the following certificate-management tasks on the target PingFederate server:

- List source trusted CAs and target key aliases
- Copy one or all trusted CAs from the source server
- Create certificates
- Create Certificate Signing Requests (CSRs)
- Import CA-signed and PKCS-12 certificates

Using the Migration Tool

The configcopy tool may be used in conjunction with one or more property files to define the operational command and other parameters, including the source and/or target PingFederate servers, and to modify configuration settings as needed for the target environment.
Property-file templates are available for each command option in `<pf_install>/pingfederate/bin/configcopy_templates`.

**Note:** Refer to the README.txt file in the configcopy_templates directory for a list of all commands and summary information. See the template files themselves for parameters associated with each command (or with use cases), as well as lists of Override Properties (configuration settings that can be modified in transit), where applicable.

Copies of the templates can be configured as needed and then used together (or combined into one file). Use the applicable filenames as an argument when running `configcopy.bat` or `configcopy.sh` (depending on your operating system) for particular configurations, using the following command syntax:

**(On Windows)**

```
configcopy.bat
-Dconfigcopy.conf.file=<properties_file1>;<properties_file2>;...
```

When paths are included with the filenames, you cannot use backslashes (`\`). Use forward slashes (`/`) or escape the backslash (`\`).

**(On Unix/Linux)**

```
configcopy.sh
-Dconfigcopy.conf.file=<properties_file1>:<properties_file2>:...
```

Note that the file separators are platform specific, corresponding to the syntax used for system-level path separators.

Alternatively (or in addition), you can specify any property values via command-execution arguments, using the following syntax:

```
cfgcopy[.sh] -D<property>=<value> ...
```

where `<property>` is any property named in the properties file and `<value>` is the value.

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

**Note:** Access to the Connection Management Web Services are password-protected (see “Application Authentication” on page 122). The usernames and passwords may be set in the properties file for both the source and target Web Services (passwords can 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 where applicable, either in the command line or in the properties file.

The configcopy utility generates its own log file, `configcopy.log`, which is located in the `<pf_install>/pingfederate/log` directory. You can control
settings for this log, as needed, in the file configcopy.log4j.properties, located in the bin directory.

⚠️ **Caution:** Importing connections or other discrete configurations at the target server is not subject to the same rigorous data validation performed by the administrative console during manual configuration. Although some checks are made, it is possible to create invalid connections using the connection-migration process. Therefore, you should not use the configcopy tool to attempt to create settings at the target that do not exist at the source; for connections and other configurations copied separately, the tool is designed only for modifying the values of existing source settings to make them applicable to the target environment.

In addition, to avoid errors and prevent unstable target configurations due to missing components or faulty cross-component references (for example, invalid ID references from connection configurations to data-store configurations), be sure to adhere closely to the instructions provided in the following procedure.

**To use configcopy:**

1. Ensure access to the Connection Management Web Service is enabled for both the source and target PingFederate servers (see “Application Authentication” on page 122).

2. Determine which component configurations need to be copied, including plugins.
   For example, connection configurations always reference either adapter or token-translator configurations (or both) and may reference data-store configurations. These are all separate configurations, and must be copied separately (unless they already exist at the target) in conjunction with copying connection configurations.
   Server Settings, unless preconfigured at the target, also need to be copied over separately.
   SaaS Provisioning settings are part of connection configurations but may be copied separately as needed to update target connections.

3. Determine whether any configuration property files or other supporting files need to be copied.

4. Ensure necessary plug-in JAR files are installed on the target server.
   The configcopy tool does not copy over these files, which include libraries for adapters, token translators, and JDBC or any custom database drivers.
   The JAR files are located in either:
   `<pf_install>/pingfederate/server/default/deploy`
   or:
   `<pf_install>/pingfederate/server/default/lib`

5. On the target server, ensure that signing certificates (or certificates used for XML decryption) are already in place (see “Security Management” on page 111).
   Private keys are not copied from server to server (public certificates may be copied); however, you may use configcopy to upload keys/certificates to the target server.
   Make note of identifying information about the target keys so you can reference the certificates in connection-copy properties.
6. If you have not yet installed your organization’s (CA-issued) SSL server certificate on both the target and source servers, either do so—you can use a configcopy command for this—or use one of the following work-arounds to ensure that configcopy can contact both servers:

   Either:
   - (Recommended) Install the Issuer certificate for the PingFederate SSL certificate in a separately managed trust store. Then the location of the file can be specified when running configcopy using the property configcopy.connection.trust.keystore.

   Or:
   - Install the Issuer certificate for the PingFederate SSL certificate into the trust store for the JDK under which configcopy runs.

   **Note:** If different SSL certificates are installed on the two servers, the configcopy tool must be able to trust both. In this case, both certificates must be installed in the trust store used by configcopy, or in the trust store for the JDK under which configcopy runs.

7. Create properties files for the necessary commands and associated command-parameter values needed to copy the required configurations and any additional files.

   Refer to the README.txt file and to the properties-file templates in the directory: `<pf_install>/pingfederate/bin/configcopy_templates`

   **Note:** This step and those following assume the use of properties files based on the templates provided; you may also use command-line parameters (see information earlier in this section).

8. If you are copying connections, override ID properties referencing adapter, data stores or other plug-in configurations, as needed (see Step 2).

   **Important:** Ensure that the plug-in configurations are either previously defined at the target or are part of the same configcopy process used to copy the connections that depend on them.

9. Create a script or run a command (or command series) that executes configcopy for each of the prepared properties files.

   See the discussion above for syntax requirements, or the README file.

### 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 24). 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 201).

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 90).
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 9: 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 213)</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 provisioner mode to FAILOVER for the associated PingFederate server node (see the Server Clustering Guide).</td>
</tr>
</tbody>
</table>

Use with node number: `-n <node ID>`

The following table 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 10: 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 user-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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><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.</td>
</tr>
<tr>
<td></td>
<td><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.)</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><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>
<tr>
<td>--show-dirty-records</td>
<td>Lists all users or groups that have not been provisioned or updated at the SaaS site.</td>
</tr>
<tr>
<td>--show-dirty-group-records</td>
<td>List groups that have not been provisioned or updated at the SaaS site.</td>
</tr>
<tr>
<td>--show-dirty-user-records</td>
<td>List all users that have not been provisioned or updated at the SaaS site.</td>
</tr>
</tbody>
</table>
### Table 10: SaaS Provisioning CLI Channel-Specific Options (Continued)

<table>
<thead>
<tr>
<th>Command Argument</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>--show-group --show-user Use with: -u &lt;SaaS name&gt; Or: -g &lt;LDAP GUID&gt;</td>
<td>Shows all internal database fields related to the specified user or group, including transitory mapping fields (fields waiting to be pushed to the SaaS provider); for a user, shows all LDAP attributes retrieved from the directory server. <strong>Note:</strong> You can obtain user or group names and GUIDs for dirty records, as needed, using any of the --show-dirty-* options (described above). The LDAP GUID, if used and if it is binary, should be entered in hexadecimal format (as shown in log files). Examples: provmgr.sh --show-user -u john@example,com provmgr.sh --show-user -g ffd448643f812b43a0bee2504173f0</td>
</tr>
<tr>
<td>--clear-dirty-records</td>
<td>Clears the dirty flag on all records.</td>
</tr>
<tr>
<td>--clear-dirty-group-records</td>
<td>Clears the dirty flag on all group records.</td>
</tr>
<tr>
<td>--clear-dirty-user-records</td>
<td>Clears the dirty flag on all user records.</td>
</tr>
<tr>
<td>--delete-dirty-records</td>
<td>Removes all dirty records from the internal store.</td>
</tr>
<tr>
<td>--delete-dirty-group-records</td>
<td>Removes all dirty group records from the internal store.</td>
</tr>
<tr>
<td>--delete-dirty-user-records</td>
<td>Removes all dirty user records from the internal store.</td>
</tr>
<tr>
<td>--delete-all --delete-all-users</td>
<td>The delete-all parameter removes all users and groups from the internal store and deletes the provisioning group timestamp and the last attribute-sync timestamp. The delete-all-users parameter deletes users and timestamps but retains groups. The effect of either command is to reset the channel to its initial state for user provisioning. All user metadata is lost and provisioning for the channel will start from the beginning, picking up all users (and groups if deleted) and pushing them to the SaaS provider when the synchronization frequency interval is expired (see “Configuring SaaS Provisioning Settings” on page 90). <strong>Important:</strong> These options should be needed rarely if ever. If needed, you may wish to schedule the operation when other network activity is low.</td>
</tr>
<tr>
<td>--show-target</td>
<td>Displays the target configuration.</td>
</tr>
<tr>
<td>--show-source</td>
<td>Displays all source LDAP configuration parameters, including settings and location.</td>
</tr>
</tbody>
</table>
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 the `<pf_install>/pingfederate/server/default/conf/template` directory.

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 373). 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 135; for the SP, see “Configuring Default URLs” on page 232).

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 11: IdP 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>Error - Single Logout</strong>&lt;br&gt;idp.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 browser</td>
</tr>
</tbody>
</table>
### Customizing User-Facing Screens

#### Table 11: 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>
</table>
| **Error - Single Sign-On**  
*idp.sso.error.page.template.html* | Displayed when IdP-initiated SSO fails and no other SSO error landing page is specified. Displays system errors and information for the user. | Error | Consult log and Web developer |
| **IdP Logout**  
*idp.logout.success.page.template.html* | Default page may be displayed when user is logged out of the IdP by the LDAP adapter (see “Configuring the IdP LDAP Adapter” on page 367). | Normal | None |
| **Please Select Authentication System**  
*sourceid-choose-idp-adapter-form-template.html* | 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. | Normal | User must make selection |
| **Signed Out**  
*sourceid-wsfed-idp-signout-cleanup-template.html* | Indicates user signed out of the IdP under the WS-Federation protocol and lists each successful SP logout, when applicable. | Normal | None |
| **Signing Out**  
*sourceid-wsfed-idp-signout-cleanup-invisible-template.html* | WS-Federation IdP sign-out processing page.  
**Note:** No HTML is rendered in the browser. | Normal | None |
| **Success - Single Logout**  
*idp.slo.success.page.template.html* | Displayed when an SLO request succeeds but no other SLO landing page is specified. | Normal | None |
| **Working . . .**  
*sourceid-wsfed-http-post-template.html* | 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.  
**Note:** Normally not displayed if Javascript executes properly. | Normal | None |

#### Table 12: 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>
| **Account Link Removed**  
*TerminateAccountLinks.page.template.html* | Communicates a user’s successful “defederation” operation. | Normal | None |
| **Account Linking**  
*LocalIdPasswordLookup.form.template.html* | Used to authenticate a user at the SP when an account link needs to be established. | Normal | None |
| **Authentication Failed**  
*sourceid-wsfed-idp-exception-template.html* | Displayed when an authentication challenge fails during WS-Federation processing. | Error | Consult log and Web developer |
Table 12: 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>
</table>
| **Error - Single Logout**
  sp.slo.error.page.template.html | Displayed when an SLO request fails and no other SLO error landing page is specified. | Error | User should close the browser |
| **Error - Single Sign-On**
  sp.sso.error.page.template.html | Displayed when SP-initiated SSO fails and no other SSO error landing page is specified. | Error | Consult log and Web developer |
| **Select Identity Provider**
  sourceid-saml2-idp-selection-template.html | 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. | Normal | User must make selection |
| **Signed Out - Service Provider**
  sourceid-wsfed-sp-signout-cleanup-template.html | Displays the user’s sign-out status. | Normal | None |
| **Success - Single Logout**
  sp.slo.success.page.template.html | Displayed when an SLO request succeeds and no other SLO success landing page is specified. | Normal | None |
| **Single Sign-On Target Unspecified**
  sp.sso.success.page.template.html | 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 232). | Error | Consult Web developer, or specify default URL |

Table 13: 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**
  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 21):
  - 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. |
### Table 13: 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>
</table>
| **Error**
  *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 |
| **Sign On**
  *AbstractPasswordIdpAuthnAdapter.form.template.html* | Challenges user for credentials when authentication can take place via HTTP Basic Authentication or an HTML form, depending on the operational mode. | Normal | User must sign on |
| **Submit Form**
  *form.autopost.template.html* | 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. **Note:** Normally not displayed if Javascript executes properly. | Normal | None |
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 77
- “Managing Data Stores” on page 93
- “Configuring IdP Discovery” on page 103
- “IdP-to-SP Adapter Mapping” on page 107

Note: The information in this chapter is presented from the viewpoint of an administrative user with “Admin” permissions (see “Account Management” on page 51).

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

**Note:** For information about WS-Trust STS Settings, see “Configuring STS Authentication” on page 309.

Information in this section covers:
- “Setting Administration Options” on page 78
- “Entering System Information” on page 79
- “Configuring Runtime Notifications” on page 79
- “Configuring Runtime Reporting” on page 80
- “Managing Accounts” on page 84
- “Choosing Roles and Protocols” on page 85
- “Specifying Federation Information” on page 87
- “Setting System Options” on page 89
- “Configuring SaaS Provisioning Settings” on page 90
- “Configuring Auto-Connect Metadata Signing” on page 91
- “Configuring Auto-Connect Metadata Lifetime” on page 92
- “Saving and Editing Server Settings” on page 92

### Setting Administration Options

The System Administration screen provides controls over the usage and behavior of the administrative console and the runtime server.

**Note:** If you are using your network’s LDAP user-data store or client certificates for administrative-console authentication, this screen is not presented (see “Alternative Console Authentication” on page 57).

<table>
<thead>
<tr>
<th>Configuring My Server</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><strong>Server Settings</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>System Administration</strong></td>
<td>✅ System Info</td>
<td>✅ Runtime Notifications</td>
<td>✅ Runtime Reporting</td>
<td>✅ System Options</td>
</tr>
<tr>
<td><strong>Account Management</strong></td>
<td>✅ Roles &amp; Protocols</td>
<td>✅ Federation Info</td>
<td>✅ System Options</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Summary</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select the style of application management practiced in your organization.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Single-User Administration
- Multi-User Administration

### System Administration Style (Console Usage)

This option provides a choice of single- or multi-user access to the administrative console.

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

multi-user administration, the system provides role-based access control (see “Account Management” on page 51).

Note: To return to single-user administration after having previously enabled multi-user, you must have only one user marked as active under Account Management.

SSL Certificate Usage Also on this screen you may choose to use different SSL server certificates for the administrative console and for PingFederate runtime processing.

To use separate SSL certificates:

- Select the associated checkbox.

Note: To completely implement this choice, you must import two (or more) server certificates into PingFederate. Then activate the certificates you want to use in each case. (See “SSL Server Certificates” on page 113.)

Entering System Information

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

<table>
<thead>
<tr>
<th>Configuring My Server</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Main</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Server Settings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☑ System Administration</td>
<td>☑ System Info</td>
<td>☑ Runtime Notifications</td>
<td>☑ Runtime Reporting</td>
<td>☑ Account Management</td>
</tr>
<tr>
<td>This is general information that identifies your server. This information is included whenever you export connection metadata.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company</th>
<th>My Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td>My Name</td>
</tr>
<tr>
<td>Contact Number</td>
<td></td>
</tr>
<tr>
<td>Contact Email</td>
<td><a href="mailto:my_email@mycompany.com">my_email@mycompany.com</a></td>
</tr>
</tbody>
</table>

To reach this screen:
1. Click Server Settings on the Main Menu.
2. Click System Info under the Server Settings tab.

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 "Managing Log Files" on page 32).

### Configuring My Server

<table>
<thead>
<tr>
<th>Configuring My Server</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Server Settings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- System Administration | System Info | Runtime Notifications | Runtime Reporting | System Options | Summary
- Account Management | Roles & Protocols | Federation Info | System Options | Summary

1. Select which server events result in notifications sent via email.
2. Notification for server licensing events
   - Email Address
3. Notification for certificate expiration events
   - Email Address
   - Initial Warning (days)
   - Final Warning (days)

**To configure notifications:**

1. Select 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 58).

### 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.
PingFederate also supports runtime monitoring and reporting through Java Management Extensions (JMX) (see “Runtime Monitoring Using JMX” on page 82).

**Using SNMP Monitoring**

The SNMP Management Information Base (MIB) defines network data available for SNMP monitoring. The MIB file is located in:

```
<pf_install>/pingfederate/docs/SNMP
```

The MIB describes the object identifiers that PingFederate uses to communicate information through SNMP. These identifiers are globally unique and managed by the Internet Assigned Numbers Authority (IANA).

Configure access to SNMP 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 the PingFederate runtime engine (for each engine separately when PingFederate is deployed in a cluster—see the PingFederate Server Clustering Guide).

**Gets** PingFederate responds to two SSO/SLO types of Get requests:

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

In addition, because PingFederate is built within an existing JBoss framework, Gets include a variety of server information available via JBoss-standard Managed Beans (MBeans). A detailed list of this information is provided in the MIB file in the
pingfederate/docs/SNMP directory. (For more information about MBeans, see the next section, “Runtime Monitoring Using JMX”).

**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.

**Traps**  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 start-up.

► 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 “System-Services Endpoints” on page 381).

**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 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 24). In addition, as with SNMP monitoring, 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 122).

**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 the previous section, “Configuring Runtime Reporting” on page 80).

**Provisioning Monitoring**

For SaaS Provisioning, PingFederate provides an MBean called pf.provisioning:type=saas.provisioning.events. The MBean exposes five JMX Operations, each corresponding to the Java methods described in Table 14. 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 14 SaaS Provisioning JMX Monitoring Options

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
<th>Parameters</th>
</tr>
</thead>
</table>
| viewEvents(  
  Boolean wasSuccessful,  
  String eventTypeStr,  
  String fromDate,  
  String toDate) | 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(  
  String fromDate,  
  String toDate) | 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. |
| provisioningCycleSummary(  
  String fromDate,  
  String toDate) | Gets a total count of provisioning cycles for the given time period. The drill-down provides information for each cycle, including success totals for users and groups added, modified, or removed in the internal tracking database; for the SaaS data store, success and failure totals are listed for each type of transaction. | 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.
Chapter 3
System Settings

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 113). (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 Options” on page 78).

<table>
<thead>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Administration</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>System Info</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Runtime Notifications</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Runtime Reporting</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account Management</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Roles &amp; Protocols</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Federation Info</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>System Options</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** If you are using your network’s LDAP user-data store or client certificates for PingFederate authentication, the Account Management screen is not presented (see “Alternative Console Authentication” on page 57).

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 51). 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 51.
Choosing Roles and Protocols

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

Note: If you are using the PingFederate WS-Trust STS, select WS-Trust as one of the supported protocols for either an IdP, an SP, or both. Notice that a new configuration step, WS-Trust STS Settings, appears under the Server Settings tab. For information about this configuration, see the “Server Settings” section under “WS-Trust STS Configuration” on page 307.

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 24).
- 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 21).

If you are installing PingFederate and are not sure of your selections, just click Next.

**Note:** If you do not choose a role during installation, you must return to this screen to do so before you can configure connections to federation partners.

To reach this screen for editing:
1. On the Main Menu under System Settings, click Server Settings.
2. Click Roles and Protocols under the Server Settings tab.

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 21).

**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 91)
- Metadata Lifetime (see “Configuring Auto-Connect Metadata Lifetime” on page 92).

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 24.)

**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 213). 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 213).

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 234).

![Tip](image)

**Tip:** After you make this selection and create XASP IdP connections (see “Configuring the Attribute Query Profile” on page 187), 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 SSO Configuration”
- Chapter 6, “Service Provider SSO Configuration”
- Chapter 7, “WS-Trust STS Configuration”
- “Configuring IdP Discovery” on page 103

**Specifying Federation Information**

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

![Notes](image)

**Notes:** You must provide an ID that uniquely identifies your federation gateway for each protocol you support. For WS-Trust STS, IDs are required for both SAML 2.0 and SAML 1.x, regardless of browser-based SSO protocol support or the type of token expected to be issued, to ensure that the STS will perform correctly under all conditions.

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 27).

You can also use a different ID for Auto-Connect transactions (see “Using Auto-Connect” on page 21).
Chapter 3  
System Settings

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base URL</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 42).</td>
</tr>
<tr>
<td>SAML 2.0 Entity ID</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>Auto-Connect Entity ID (URL)</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 23). 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 21).</td>
</tr>
</tbody>
</table>
Managing Server Settings

To reach this screen:
1. Click **Server Settings** on the Main Menu.
2. Click **Federation Info** under the Server Settings tab.

### Setting System Options

This screen provides a global setting that allows you to turn off automatic multi-connection error checking, which occurs by default for all configured connections whenever you access connection lists (Manage Connections screens available via **Manage All . . .** links on the Main Menu). The same multi-connection checking also occurs when you access the Manage IdP/SP Adapter Instances screens.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAML 1.x Issuer/Audience</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 85).

Because the validation time increases with the number of connections and adapter instances, this option is provided in case you experience any noticeable delays in loading either of the Manage Connection screens or the adapter management.
screens. Disabling the feature results in immediate display of the screens, deferring error checking to manual controls on Manage Connection screens.

**Note:** This option does not affect the validation of connections as they are being configured or modified. Also, individual connections are always validated automatically when accessed for editing, regardless of the setting on this screen.

The multi-connection error checking is intended to verify that completed connections have not been affected by any subsequent changes in adapter configurations or other dependencies such as data-store access (see “Data Stores” on page 15).

For more information about connection validation, see:

- “Managing Connection Validation” on page 142 (for SP connections)
- “Managing Connection Validation” on page 241 (for IdP connections)

### 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 24).

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 85).

**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.

The database stores the state of synchronization between the source data store and the target data store, enabling periodic checking to determine whether updates are
Managing Server Settings

required at the target SaaS site. (For information on configuring provisioning as an IdP, see “Configuring SaaS Provisioning” on page 201.)

Note: PingFederate has been tested using Hypersonic, Oracle, and MySQL databases as internal provisioning data stores. However, any relational database should work as well; adaptable setup scripts used for Hypersonic, Oracle, and MySQL are provided in the directory: <pf_install>/pingfederate/server/default/conf/provisioner/sql-scripts

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 93).

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 22).

On the Metadata Signing screen, choose a certificate to use for signing the metadata.

Important: The certificate CN must match the domain name associated with the Entity ID (see “Specifying Federation Information” on page 87).

This screen appears only if Auto-Connect is enabled for either an IdP or SP (see “Choosing Roles and Protocols” on page 85).
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 117).

2. (Optional) Select the Signing Algorithm from the drop-down list.
   
   The default selection, RSA SHA1, is the most commonly used. Make a different selection only if you and your connection partner have agreed to use a stronger algorithm.

   **Note:** The public certificate is included as part of the metadata and must be trusted by your partner (see “Auto-Connect Security Model” on page 23).

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.

This screen appears only if Auto-Connect is enabled for either an IdP or SP (see “Choosing Roles and Protocols” on page 85).

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 “Managing Log Files” on page 32). 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 16).

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 164). 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 “SSO Integration Kits and Adapters” on page 9). 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 24).

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 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 94.
• For LDAP configuration information see “Configuring an LDAP Connection” on page 99.
• For Custom configuration information see “Configuring a Custom Data Store” on page 101.

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 94.
• For LDAP configuration information see “Configuring an LDAP Connection” on page 99.
• For Custom configuration information see “Configuring a Custom Data Store” on page 101.

![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 undedelete.)
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, in the format: 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. <strong>Note:</strong> For MySQL, to enable automatic reconnection attempts if the connection is not available at runtime, enter a SQL statement in the Validate Connection SQL field below and add the following query string to the JDBC URL: ?autoReconnect=true For more information, see the field description for Validate Connection SQL below.</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>
</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.

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
3. Enter a valid Username and Password.
4. (Optional) Enter a valid SQL statement in the Validate Connection SQL field.
   For information, see the Description of this field in the “Field Descriptions” table above.
5. (Optional) Select Mask Values in Log.
   For information, see “Attribute Masking” on page 16.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mask Values in Log (Checkbox)</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 16).</td>
</tr>
<tr>
<td>Validate Connection SQL</td>
<td>(Optional, but recommended) A simple SQL statement used by PingFederate at runtime to verify that the database connection is still active and to reconnect if needed. If a SQL statement is not provided here, PingFederate may not be able to reconnect to the database if the connection is broken. <strong>Note:</strong> To use this feature for MySQL, you must also add a query parameter to the JDBC URL (see information in field description above). <strong>Important:</strong> Ensure that the SQL statement is valid for your database. Examples: (For Oracle or MySQL) SELECT 1 from dual (For SQL Server) SELECT getdate()</td>
</tr>
</tbody>
</table>

**Note:** The driver JAR file must be loaded into the directory: pingfederate/server/default/lib
6. (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 97).

7. 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.

8. On the Summary screen, click Done.
9. 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.

<table>
<thead>
<tr>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Pool Size</td>
</tr>
<tr>
<td>Maximum Pool Size</td>
</tr>
<tr>
<td>Blocking Timeout (ms)</td>
</tr>
<tr>
<td>Idle Timeout (ms)</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**.

**Defining an Account-Linking Database**

When an SP is configured to use account linking for an IdP connection, PingFederate uses an embedded Hypersonic database as the account-link repository (see “Account Linking” on page 10). This default implementation does not require any changes to PingFederate to support account linking. However, you can manually customize PingFederate to store account links in an external JDBC database. You might want to do this for any of several reasons, including:

- You are running a cluster of PingFederate runtime engines (see the PingFederate Server Clustering Guide). This scenario requires that you use an external database for account links to ensure proper local user lookup.
- You have performance or scalability requirements that exceed the Hypersonic database's capabilities.
- You and your federation partner previously established a different system for creating and mapping opaque pseudonyms, and PingFederate needs access to the system.

Changing the default database involves creating a table in your JDBC database to support account linking, and modifying PingFederate configuration XML files to use the database.

**To create a database table for account linking:**

- Run one of the table-setup scripts provided in the directory:

  `<pf_install>/server/default/conf/account-linking/sql-scripts`

- If a script is not provided for your database, you can derive the setup from information available in any of the other scripts.

**To change the account-linking database:**

1. If you have not already done so, create a connection to the database you want to use (see “Configuring a JDBC Database Connection” on page 94).
   
   Be sure to save the configuration on the Manage Data Stores screen.

2. Any time after saving the database connection, return to the Manage Data Stores screen from the Main Menu.
   
   (To reach the screen, click **Data Stores** under System Settings.)

3. Copy the System ID for the database you want.

4. In the directory `<pf_install>/server/default/data/config-store`, open the file:


5. In the file above, change the value of the item named **PingFederateDSJNDIName** to the System ID you copied at **Step 3** and save the file.
6. Start or restart PingFederate.

**Note:** If you are running PingFederate in a cluster, push the new configuration to other server nodes (see the PingFederate Server Clustering Guide).

### Configuring an LDAP Connection

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hostname(s)</td>
<td>The DNS name or IP address of the data store, which may include a port number; example: 181.20.42.130:389. For failover, you can enter one or more backup LDAP servers, each separated by a space. <strong>Note:</strong> If more than one Hostname is entered, each server must be accessible using the same User DN and Password (or via Bind Anonymously).</td>
</tr>
</tbody>
</table>
To establish a connection to an LDAP data store:

1. Enter the applicable Hostname(s).
   For more information, see the description for this field in the table above.
   Hostnames identify this LDAP configuration 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.
   - Select an LDAP Type from the drop-down list.
     For more information, see the description for this selection in the table above.

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 24). Identifying the LDAP type permits PingFederate to configure many provisioning settings automatically (see “Modifying Source Settings” on page 205). <strong>Tip:</strong> If you are using SaaS Provisioning and your LDAP server is <em>not</em> 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 101). If you are not using SaaS Provisioning, the selection of an LDAP Type has no effect.</td>
</tr>
<tr>
<td>Bind Anonymously (Checkbox)</td>
<td>(Optional) Username and password are not required (see procedure below).</td>
</tr>
<tr>
<td>User DN</td>
<td>The username credential required to access the data store. <strong>Important:</strong> The user must have permission to search the directory for user-account information. For security, this user should have read-only access.</td>
</tr>
<tr>
<td>Password</td>
<td>The password credential required to access the data store.</td>
</tr>
<tr>
<td>Use SSL (Checkbox)</td>
<td>(Optional) Connects to the LDAP data store using secure SSL/TLS encryption. This selection applies equally to any secondary servers specified in Hostname(s). <strong>Caution:</strong> We recommend that all LDAP connections use SSL.</td>
</tr>
<tr>
<td>Mask Values in Log (Checkbox)</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 16).</td>
</tr>
</tbody>
</table>
Managing Data Stores

Enter a valid User DN and Password.

**Note:** If you choose an anonymous binding, ensure that this access level provides permission to search the directory for user-account information.

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 24).

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 205).

**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:
   ```plaintext
   <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 205).

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 16.
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.
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 a 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 107). 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 85). 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.

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 85).
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 85).
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.)

<table>
<thead>
<tr>
<th>Configuring My Server</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><strong>Configure IdP Discovery</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓ Domain Cookie Settings</td>
<td>✗ <strong>Common Domain Service</strong></td>
<td>✓ Local Common Domain Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓ Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please enter location and authentication information about the common domain service.

- **Base URL of the PingFederate common domain service**: https://sample.pingidentity.com:903
- **Pass Phrase**: ********
- **Confirm Pass**: ********

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 85).
2. On the IdP Discovery screen, click **Configure IdP Discovery**.
3. Click **Common Domain Service** under the Configure IdP Discovery tab. This step is not available if your server is configured for IdP Discovery only (see “Choosing Roles and Protocols” on page 85).

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.
Chapter 3
System Settings

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 85).
2. On the IdP Discovery screen, click Configure IdP Discovery.
3. Click Local Common Domain Server under the Configure IdP Discovery tab.
   This step is available only if the common-server option is selected under Domain Cookie Settings (see “Configuring IdP Discovery” on page 103).

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 (days).
   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.sourced.webssso.profiles.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 Protocol Settings” on page 267).

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><code>IdpIdCookieName</code></td>
<td>The name of the IPRC set by the SP installation (default: <code>IdPId</code>). Note that the cookie name cannot contain any of the following characters: &amp;, &gt;, &lt;, comma, semicolon, space.</td>
</tr>
<tr>
<td><code>IdpIdCookieLifeTimeInDays</code></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><code>ShowIdpSelectionList</code></td>
<td>If set to <code>true</code> (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 <code>false</code>, 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.

### IdP-to-SP Adapter Mapping

This configuration is provided for special use cases in which PingFederate is acting as both an IdP and an SP, and user attributes from an IdP adapter are used to create an authenticated session via an SP adapter on the same PingFederate server. Generally, these cases involve SaaS providers who may not support standards-based SSO but do
provide proprietary SSO with “delegated authentication” (for example, Salesforce and Workday).

The mapping may also be used to enable the Google Apps Password Manager (available separately with the Google Apps Connector—see “SaaS Provisioning” on page 24).

In effect, this configuration provides an alternative to setting up complete connections to send SAML assertions and other messages back and forth between an IdP and an SP running on the same PingFederate server (a loopback configuration) to enable nonstandard use cases. Instead, attributes that would normally be sent in an assertion are mapped directly from the IdP authentication adapter to an SP adapter, resulting in a secure SP user session.

To use this configuration, ensure that you have already configured the required IdP and SP adapter instances. Note that you may reuse instances that are also in use for connection configurations. For more information, see:

- “Configuring IdP Adapters” on page 130
- “Configuring SP Adapters” on page 226

Managing Mappings

On the Manage Mappings screen you can add, modify, or delete IdP-to-SP Adapter Mappings.

<table>
<thead>
<tr>
<th>Configuring My Server</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>↑ Main</td>
<td>IdP-to-SP Adapter Mapping</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Mappings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This configuration allows user attributes from an IdP Adapter to be mapped directly to an SP Adapter on the same PingFederate server to create an authenticated session for special use cases, without the need to generate SAML messages in between.

**To add a mapping:**

- Select the adapter Source Instance (IdP) and Target Instance (SP) and click Add Mapping.

**Note:** You can create only one mapping of a source to the same target. However, you can map different sources to the same target, and vice versa.

**To edit a mapping:**

- Click the mapping name.

**To delete a mapping:**

- Click Delete under Actions for the mapping and then click Save.
Choosing a Data Store (Optional)

Under some circumstances, to fulfill the SP adapter contract, you may need to look up user attributes in a data store to supplement those available from the user’s session via the IdP adapter. This screen provides that option.

If data-store lookup is not required, click Next.

If data-store lookup is required, choose the Active Data Store from the drop-down list and then click Next.

If the data store is not listed, click Manage Data Stores (see “Managing Data Stores” on page 93).

Note: Data-store lookup screens for this configuration are functionally identical to those used for an IdP connection. Refer to the table below to find applicable sections in this manual containing configuration information and procedures. Then continue to the next section, “Adapter Contract Fulfillment”.

For information about data-store lookup configuration screens, depending the type of data store, use this table:

<table>
<thead>
<tr>
<th>Data Store Type</th>
<th>Manual Sections</th>
</tr>
</thead>
</table>
| JDBC            | • “Selecting a JDBC Database Table and Columns” on page 166  
                  • “Configuring a Database Filter (WHERE Clause)” on page 168 |
| LDAP            | • “Configuring an LDAP Directory Search” on page 170  
                  • “Configuring an LDAP Filter” on page 171 |
| Custom          | • “Configuring Custom Source Filters” on page 173  
                  • “Selecting Custom Source Fields” on page 173 |

Adapter Contract Fulfillment

The last step in this configuration is to map values from the IdP adapter into the attributes required by the SP adapter (the Adapter Contract).
Map each attribute to fulfill the Adapter Contract from one of these Sources:

- **Adapter**
  When you make this selection, the associated Value drop-down list is populated by the IdP adapter.

- **LDAP/JDBC/Custom** (if a data store is configured)
  Values are returned from a data source. When you make this selection, the Value list is populated by the LDAP, JDBC or Custom attributes you identified.

- **Expression** (when enabled)
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.

- **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 IdP 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.

**To map attributes:**

1. Choose a Source for each SP Adapter Contract attribute.
   See the list above, under “Map each attribute to fulfill the Adapter Contract from one of these Sources”.

2. Choose (or enter) a Value for each attribute.
   All values must be mapped.

3. Click **Next** (or **Done**, if you are finished with the configuration, and then **Save** on the Manage Mappings screen).

**Using the Summary Screen**

When you have finished configuring IdP-to-SP Adapter Mapping, 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** and then **Save** on the Manage Mappings screen.
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 383).

**Note:** PingFederate does not support Certificate Extensions.

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 51).

### Trusted Certificate Authorities

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 Certificate Authority is not
one of the major authorities, you may also need to import the certificate from the CA that signed the partner certificate.

**Note:** If a required CA certificate is already available in `cacerts` in the Java runtime, it is not necessary to import the same certificate into the PingFederate store.

---

### SSL Server Certificates

PingFederate provides built-in SSL/TLS certificate management. Use this feature to establish and maintain the certificate(s) presented for access to the PingFederate administrative console and for incoming SSL/TLS connections at runtime (see “Setting Administration Options” on page 78).
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 for Runtime Server or Activate for Admin Console under Action for the certificate you want to activate.
   - These choices are enabled only if you have created or imported more than one certificate. Otherwise, a single certificate is used for both the administrative console and runtime operations.
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.
2. Select **Certificate Only** on the Export Certificate screen.
   Or:
   Select **Certificate and Private Key** and enter an Encryption Password.
3. Click **Next**.
4. On the Certificate Summary screen, click **Export**.
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 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>
</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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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

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.
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 21).

<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

Digital Signing and Decryption Keys & Certificates

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.
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>
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<tr>
<th>Field</th>
<th>Description</th>
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<td>The state (ST) or other political unit encompassing the location.</td>
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<td>The country (C) where the company is based.</td>
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<td>Validity (days)</td>
<td>The time during which the certificate is valid.</td>
</tr>
<tr>
<td>Key Algorithm</td>
<td>A mathematical formula used to generate a key. PingFederate uses either of</td>
</tr>
<tr>
<td>(drop-down menu)</td>
<td>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 380).

In addition, authentication is required to access PingFederate runtime data via JMX (see “Runtime Monitoring Using JMX” on page 82) 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 383).

**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:**
- On the Main Menu, click **Application Authentication** under Security in the System Settings section.

**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**.

**Tip:** Although not accessible when deactivated, the Connection Management Service and the SSO Directory Service are still deployed by default as part of PingFederate. If your organization does not plan to use one (or either) of these services, you may wish to remove the corresponding WAR file(s) from the `<pf_install>/pingfederate/server/deploy` or (and) `../deploy2` directories, respectively:

- `pf-ws.war`
- `pf-mgmt-ws.war`

---

**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 17). 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 18).

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 OCSP 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>
</tbody>
</table>
## Field/Selection | Description
--- | ---
Default OCSP Responder URL | 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.

Default OCSP Responder Signature Verification Certificate | 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).

Do NOT allow Responder to use cached responses | 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. **Important:** Making this selection may slow down OCSP response time for a request and will increase general processing overhead at the Responder site.

This Update Grace Period | For the response to be considered valid, the PingFederate server-clock time must correspond to the `<thisUpdate>` timestamp in the OCSP response, plus or minus the number of minutes set for this field (to compensate for clock variances).

Next Update Grace Period | If the response includes a `<nextUpdate>` 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.

Responder Timeout | The allowable response time before the OCSP Responder URL is considered unavailable and processing continues (see “OCSP Responder is Unavailable,” below).

Certificate is Unknown | 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.

OCSP Responder is Unavailable | Indicates what action to take if the Responder cannot be reached.

OCSP Responder Returns Error | Indicates what action to take if the Responder returns an error.
Chapter 4
Security Management

Field Descriptions (For CRL Checking)

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
<tr>
<td>Enable CRL Checking</td>
<td>Enables CRL revocation checking (the default). <strong>Note:</strong> 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>
</tr>
<tr>
<td>Treat Unretrievable CRLs as Revoked</td>
<td>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.</td>
</tr>
<tr>
<td>Next Retry on Resolution Failure</td>
<td>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.</td>
</tr>
<tr>
<td>Next Retry on Next Update Expiration</td>
<td>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.</td>
</tr>
<tr>
<td>Verify CRL Signature</td>
<td>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 Certificate Authorities” on page 111).</td>
</tr>
<tr>
<td>Proxy Settings</td>
<td>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.</td>
</tr>
</tbody>
</table>
Identity Provider SSO Configuration

In an IdP role, you use the PingFederate administrative console to configure local application-integration information and to manage connections to 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 85).

Note that only one connection is needed per 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 protocols, or supports multiple federation IDs for the same protocol (see “Federation Server Identification” on page 27).

Under some conditions, you can enable SSO for an unlimited number of partners at once by configuring a single, common connection (see “Using Auto-Connect” on page 21). You can also expedite single end-to-end connections by taking advantage of PingFederate Express (see “About PingFederate Express” on page 19).

This chapter covers the following topics:

- “Application Integration Settings” on page 130
- “Viewing Protocol Endpoints” on page 136
- “Managing SP Connections” on page 137
- “Defining SP Affiliations” on page 213
- “Using the Express Connection Template” on page 216
- “Configuring SP Auto-Connect” on page 220
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 “SSO Integration Kits and Adapters” on page 9).

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.

Note: If your PingFederate configuration enables the WS-Trust STS, the selections under Application Integration Settings also include links for configuring plug-in Token Processors and, optionally, STS Request Parameters. Locate configuration information under “IdP Configuration for STS” on page 314.

Configuring IdP Adapters

An IdP adapter is used to look up session information and provide user identification to PingFederate (see “SSO Integration Kits and Adapters” on page 9).

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 359 or “Configuring the IdP LDAP Adapter” on page 367, respectively.

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

To configure a new instance:

- Click Create New Instance.

To edit an existing adapter instance:

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

   ![Message] 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 “SSO Integration Kits and Adapters” on page 9). Other adapters and integration kits are available from the Ping Identity Web site (www.pingidentity.com/support-and-downloads).

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance Name</td>
<td>A descriptive name for the adapter instance—for example, an identity management system name.</td>
</tr>
<tr>
<td>Instance ID</td>
<td>An internal identifier for the adapter instance. Must be alphanumeric with no spaces.</td>
</tr>
<tr>
<td>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 Instance Name and Instance Id on the Type screen.
2. Select the Type from the drop-down menu.

   If the adapter you need is not listed, click **Visit PingIdentity.com for additional types** to see if a suitable adapter is available from the PingFederate download site, or create your own adapter (see “SSO Integration Kits and Adapters” on page 9).
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 “SSO Integration Kits and Adapters” on page 9). For information about configuring the adapters packaged with PingFederate, see “OpenToken Adapter Configuration” on page 357 or “LDAP Adapter Configuration” on page 365.

4. Click **Done** on the Adapter Summary screen.
5. Click **Save** on the Manage IdP 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 “SSO Integration Kits and Adapters” on page 9).

- For information about configuring the OpenToken Adapter, see “OpenToken Adapter Configuration” on page 357.

- For information about configuring the LDAP Authentication Service, see “LDAP Adapter Configuration” on page 365.

**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 on the Manage IdP Adapter Instances screen. 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 359.

- For information about actions available using the LDAP Authentication Service, see “Configuring the IdP LDAP Adapter” on page 367.

### Configuring IdP Adapter

<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>Manage IdP Adapter Instances</td>
<td>Create Adapter Instance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Type** | **IdP Adapter** | **Actions** | **Extended Contract** | **Adapter Attributes** | Summary |

These are the actions that this adapter type can perform.

<table>
<thead>
<tr>
<th>Action Name</th>
<th>Action Description</th>
<th>Action Invocation Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download</td>
<td>Download the configuration file for the agent.</td>
<td>Invoke Download</td>
</tr>
</tbody>
</table>
To reach this screen:
1. Click **Adapters** on the Main Menu.
2. Click an Instance Name on the Manage IdP Adapter Instances screen.
3. Click **Actions** (if available).

To generate a properties list:
- Click **Download** 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 357).

### Configuring IdP Adapter

<table>
<thead>
<tr>
<th>Core Contract</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>subject</td>
<td></td>
</tr>
</tbody>
</table>

**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 10).

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 16).
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.

  If OGNL expressions might be used to map derived values into outgoing assertions and you want those values masked, select the related checkbox under the Attribute list (see “Using Attribute Mapping Expressions” on page 391).

To reach this screen:
1. Click **Adapters** on the Main Menu.
2. Click an 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 IdP Adapter Instances screen.

To save an adapter instance:
1. Click Done on the Summary screen.
2. Click Save on the Manage IdP 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 373; 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 72).
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 “SSO Integration Kits and Adapters” on page 9).

**Note:** For specific parameters required or allowed for Application Endpoints, see “IdP Endpoints” on page 373.

This screen also shows a Maintenance Endpoint that you can use to verify that the PingFederate server is running (see “System-Services Endpoints” on page 381).

Viewing Protocol Endpoints

Click Protocol Endpoints under Federation Settings in the IdP Configuration section of the Main Menu to see a list of SAML, WS-Federation, and/or WS-Trust STS endpoints—a pop-up window displays only those endpoints related to the federation protocols you have chosen (see “Choosing Roles and Protocols” on page 85). These endpoints are built into PingFederate and cannot be changed.

Your federation partners or STS clients need to know the applicable IdP Services endpoints to communicate with your PingFederate server. Configured service endpoints for SAML connections are included in metadata export files (see “Exporting Metadata” on page 42).

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>/idp/SLO.saml2&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>/idp/SSO.saml2&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>/idp/ARS.ssaml2&lt;br&gt;The SOAP endpoint that processes artifacts returned from a federation partner to retrieve the referenced XML message on the back channel. (See “<strong>Important</strong>” footnote in this table.)</td>
</tr>
<tr>
<td>Attribute Query Service (SAML 2.0)</td>
<td>/idp/attrsvc.ssaml2&lt;br&gt;The SAML implementation that receives and processes attribute requests. (See “<strong>Important</strong>” footnote in this table.)</td>
</tr>
</tbody>
</table>
Managing SP Connections

As an IdP, you manage connection settings to support the exchange of federation-protocol messages (SAML, WS-Federation, or WS-Trust) with an SP or STS client application at your site.

Table 15: PingFederate IdP Endpoints (Continued)

<table>
<thead>
<tr>
<th>Service</th>
<th>URL and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metadata Service</td>
<td>/ The default endpoint (empty path) from which partners can retrieve Auto-Connect metadata (see “Using Auto-Connect” on page 21).</td>
</tr>
<tr>
<td>Single Sign-on Service (SAML 1.x)</td>
<td>/idp/isx.saml1 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>/idp/soap.ssaml1 The SOAP endpoint that processes artifacts returned from a federation partner to retrieve the referenced XML message on the back channel. (See “Important” footnote in this table.)</td>
</tr>
<tr>
<td>Single Sign-on Service (WS-Federation)</td>
<td>/idp/prp.wsf The WS-Federation implementation URL that receives and processes security-token requests and SLO messages.</td>
</tr>
<tr>
<td>WS-Trust STS</td>
<td>/idp/sts.wst The SOAP endpoint that receives and processes security-token requests from STS clients (Web Service Clients at the IdP site) (See “Important” footnote in this table.)</td>
</tr>
</tbody>
</table>

Important: If mutual SSL/TLS is used for authentication, a secondary PingFederate listening port must be configured and used by partners or STS clients for the relevant endpoints—*.ssaml* and *.wst (see “Changing Configuration Parameters” on page 60).

Managing SP Connections

As an IdP, you manage connection settings to support the exchange of federation-protocol messages (SAML, WS-Federation, or WS-Trust) with an SP or STS client application at your site.

Note: If you are configuring a new connection only for WS-Trust STS, follow the sections in this part of the manual up to and including “General Information” on page 146. Then turn to “WS-Trust STS Configuration” on page 307.

These settings include:
- User attributes you expect to send in an SSO assertion (including STS SAML tokens).
- 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 connection partner must have decided this information in advance (see “Federation Planning Checklist” on page 26). Your federation partner must supply some connection settings and other information (see “Configuration Data Exchange” on page 28).

Tip: PingFederate provides the capability of using a template to create simple, lightweight connections for browser-based SSO to SP partners (see “About PingFederate Express” on page 19).

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 220).

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 93).

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 140).
Note that long connection names are truncated for this display and the list is limited to four connections, chronologically ordered according to most recently edited. The full connection names and a complete list are displayed on the Manage Connections screen (see “Using the Manage Connections Screen” on page 140).

To begin configuring a new connection:

1. Click Create New under SP Connections on the Main Menu.

   **Tip:** If you want to use a virtual ID for a second 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 140). For information about virtual IDs, see “Federation Server Identification” on page 27.

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:

- Create a new connection.
- Modify or copy an existing connection.
- Continue working on a connection draft.
- Delete a connection—if it is not active or referenced in other parts of the configuration (In Use).
- Export individual connection configurations.

**Note:** The connection export function results in an XML file that you can modify and import into another PingFederate server acting in the same federation role (IdP or SP) at your site (see “Connection Management Service” on page 383). You can also automate this process (see “Automating Configuration Migration” on page 64).

- Export metadata about a connection to expedite your partner’s corresponding configuration (see “Exporting Metadata” on page 42).

**Tip:** Use this function for PingFederate Express connections (see “About PingFederate Express” on page 19). Save the resulting ZIP file on your file system and send it your Express partner.

On 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 35).

**Tip:** A green icon (✓) next to a Connection Name indicates that the connection has been checked for configuration errors. For more information about connection-validation features associated with this screen, see “Managing Connection Validation” on page 142.

### 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.

**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 27.

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 146).
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 23).

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 Connection** 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 acting in the same role (see “Connection Management Service” on page 383).

To export connection metadata:

1. Click **Export Metadata** under Action for the connection.

**Note:** For SP PingFederate Express connections, save the resulting ZIP file on your file system and send it your Express partner (see “About PingFederate Express” on page 19). For other connection types, continue to the next step.

For non-Express connections this action takes you to the Export Metadata screen flow, with the connection selection preset (see “Exporting Metadata” on page 42).

2. Complete the steps remaining in the Export Metadata screen flow (starting at **Step 4** under “To export connection metadata:” on page 43).
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 or In Use.

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.

Managing Connection Validation

By default PingFederate automatically validates all existing connections before
displaying the Manage Connections screen. This validation ensures that any updates
to supporting components—adapters or data-store configurations, for example—
have not invalidated any connection settings.

If such errors are found, a warning icon (⚠️) appears next to the Connection Name.

To correct errors:
- Click the Connection Name to reach the top-level task in which
  reconfiguration is needed, and to see the error message. Then navigate into
deeper tasks using Configure . . . buttons to find a link to the screen that needs
  updating.

  (For more information about console navigation, see “About Tasks and Steps” in
  the “Console Navigation” chapter of Getting Started.)

Note that the connection validation time increases with the number of connections
and when connections are configured to access data stores for attribute mapping.
Consequently, there may be noticeable delays in displaying the Manage
Connections screen. For this reason, PingFederate provides a way to turn off the
automatic validation under Server Settings (see “Setting System Options” on
page 89).

When validation is turned off, administrators can check connections manually on
the Manage Connections screen. A question-mark icon (❓) indicates the
connection has not been validated. In addition, Action links are disabled (except for
Delete, if the connection is Inactive and/or In Use). You may, however, still edit the
connection by clicking its name.

When automatic validation is disabled, use one of the following procedures to
validate connections:

---

142 PingFederate 6.4
To validate a *single* connection:

- Click 🔍 next to the Connection Name.

**Note:** Validating a single connection does not check connectivity for any configured data-store lookups (see “Selecting Assertion Mapping” on page 162). However, this check is performed when you access the connection for editing.

To validate *all* connections (including for data-store connectivity):

1. Click **Check All Connections for Errors**.
2. When prompted, click **Yes**.

### Choosing a Connection Template

On the Connection Template screen (shown only for a new connection), you can choose a quick-connection template for PingFederate Express partners (see “About PingFederate Express” on page 21). Or if your installation includes an optional PingFederate SaaS Connector, you can choose the template indicated for the applicable SaaS vendor (see “SaaS Provisioning” on page 24).

**Tip:** When you select a Connection Template, many connection settings are configured for you automatically. For information about using the PingFederate Express template and what steps remain to be configured, see “Using the Express Connection Template” on page 216. For information about using SaaS Connector templates, refer to the Quick Connection Guide available with your PingFederate SaaS Connector.

![Connection Template Screen](image.png)

To configure a connection without a template, click **Next**.

To use a template, select that option, then choose the template and enter additional information as required.

For guidance on any entries required on this screen, as well as for further template-configuration requirements and options, see either:

- “Using the Express Connection Template” on page 216
- The Quick Connection Guide contained in the distribution package for the selected SaaS Connector
Choosing a Connection Type

If you are not using a connection template (which preconfigures browser-based SSO), indicate on the Connection Type screen whether the connection to this partner is for Browser SSO, WS-Trust STS, or both (see “Connection Types” on page 5).

Note: Once you have clicked Next, you cannot return to this screen and make a different selection. If you intended to use a different template or no template, you must create a new connection.

If your federation deployment supports multiple protocols and you are not using a connection template, then for new SSO connections you can also select the applicable protocol on the Connection Type screen (see “Choosing Roles and Protocols” on page 85).

Note: Except for PingFederate Express connections, you can add STS support to any existing SSO connection, or vice versa, at any time.

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 configure a connection for secure Internet SSO, select Browser SSO Profiles and the Protocol (if necessary).

To configure a connection for WS-Trust STS, make that selection and then select a Default Token Type.

The Default Token Type, either SAML 1.1 or 2.0, is used when a Web Service client does not specify in the token request what token type the STS should issue.

Note: The Default Token Type does not need to match the Protocol indicated on the screen for SSO (when applicable).
(Optional) If your PingFederate license manages connections by groups, then you can select a group for this connection.

This option is not displayed for unrestricted or other types of licenses.

Choosing Connection Options

On the Connection Options screen, if your installation includes a PingFederate SaaS Connector that supports provisioning and you are using the associated connection template, you can confirm whether to configure provisioning (the default) for this connection (see “SaaS Provisioning” on page 24).

For SAML 2.0, you also have the option of configuring the Attribute Query profile, with or without SSO (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

**Note:** This screen is presented only for browser-based SSO connections (see “Choosing a Connection Type” on page 144).

- To create a connection for secure Internet SSO, ensure that Browser SSO is selected and click Next.
- If you are using a connection template for a SaaS provider but do not want to configure provisioning for this connection, clear the SaaS Provisioning checkbox.

Importing Metadata

If you are using one of the SAML protocols (without a connection template) 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 146). Consequently, individual endpoints on other screens do not include this information—only relative paths are shown.
Chapter 5
Identity Provider SSO Configuration

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 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 35).
**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><em>(Required)</em> 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 42). For STS-only connections, this ID can be any unique identifier.</td>
</tr>
<tr>
<td>Connection Name</td>
<td><em>(Required)</em> 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>
</tbody>
</table>
Chapter 5
Identity Provider SSO Configuration

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 87).</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 35). Note that you can override connection logging mode settings globally from the connections list (see “Using the Manage Connections Screen” on page 140).</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 under the SP Connection tab.

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 27).

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

Configuring Browser-Based SSO

Browser-based SSO (also, Browser SSO) is another term for secure Internet SSO, which relies on a user's Web browser and HTTP to broker XML identity-federation messaging between an IdP and an SP (in contrast to WS-Trust STS messaging, which is typically application-driven across the back channel and does not require browser mediation).
To continue, click **Configure Browser SSO.**

**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. Still others are required only based on certain selections. The PingFederate administrative console determines the required and optional steps based on the protocol and dynamically presents additional requirements or options based on selections.

The following sections provide sequential information about every step you might encounter while configuring browser-based SSO, 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 discussions also apply to the other protocols, unless otherwise indicated.

After configuring SSO settings, you will normally need to configure authentication credentials, the range of which depends on your SSO selections (see “Configuring Credentials” on page 191). Also, other configuration tasks may remain to be configured for new or modified connections, depending on selected connection options (see “Choosing Connection Options” on page 145).

**Important:** For new connections you must completely configure these SSO settings and subsequent tasks before you can save the connection on the Activation & Summary screen. Until then, the configuration is temporary and can be lost; the console times out after several minutes of inactivity. At any time, 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*).
Use the lists and links (or page references) below to find specific information about steps that may apply to your SSO connection requirements:

**SAML 2.0 SSO Configuration Steps**
- “Choosing Profiles (SAML 2.0)” on page 150
- “Setting an Assertion Lifetime” on page 153
- “Assertion Creation” on page 153
  - “Choosing an Identity Mapping Method” on page 154
  - “Creating an Attribute Contract” on page 156
  - “IdP Adapter Mapping” on page 158
- “Configuring Protocol Settings” on page 178
  - “Setting Assertion Consumer Service URLs (SAML)” on page 178
  - “Specifying SLO Service URLs (SAML)” on page 181
  - “Choosing Allowable SAML Bindings (SAML 2.0)” on page 182
  - “Setting an Artifact Lifetime (SAML)” on page 183
  - “Specifying Artifact Resolver Locations (SAML 2.0)” on page 183
  - “Configuring Signature Policy” on page 184
  - “Configuring XML Encryption Policy (SAML 2.0)” on page 185

**WS-Federation SSO Configuration Steps**
- “Setting an Assertion Lifetime” on page 153
- “Assertion Creation” on page 153
  - “Choosing an Identity Mapping Method” on page 154
  - “Creating an Attribute Contract” on page 156
  - “IdP Adapter Mapping” on page 158
- “Configuring Protocol Settings” on page 178
  - “Defining a Service URL (WS-Federation)” on page 180

**SAML 1.x SSO Configuration Steps**
- “Setting an Assertion Lifetime” on page 153
- “Assertion Creation” on page 153
  - “Choosing an Identity Mapping Method” on page 154
  - “Creating an Attribute Contract” on page 156
  - “IdP Adapter Mapping” on page 158
- “Configuring Protocol Settings” on page 178
  - “Setting Assertion Consumer Service URLs (SAML)” on page 178
  - “Setting a Default Target URL (SAML 1.x)” on page 180
  - “Setting an Artifact Lifetime (SAML)” on page 183
  - “Configuring Signature Policy” on page 184

**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 26). For SAML 2.0, PingFederate supports all IdP- and SP-initiated SSO and SLO profiles.

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

To reach this screen for editing:

1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click SAML Profiles on the Summary screen.

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.
2. Continue through the remaining connection-configuration tasks.

The following sections provide more information on requirements for each SAML profile:

### 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 16).

For illustrations of typical profile and binding scenarios, see the “Profiles” sections in the “Supported Standards” chapter in Getting Started.

**Note:** This screen is not presented for SAML 1.x connections because IdP SSO is assumed, the SLO 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 screen 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).
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)

**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 illustrations of typical profile and binding scenarios, see the “Profiles” sections in the “Supported Standards” chapter in Getting Started.

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.

**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.

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)

**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.
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 SingleLogoutService(s)
- The URL of your SP’s ArtifactResolutionService(s) —if this binding and endpoint are different from your SSO configuration—and SOAP client authentication requirements

## 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 assertion 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.

## 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 156).

• Configuring instances of one or more adapters (see “IdP Adapter Mapping” on page 158) and specifying how they are used to fulfill the attribute contract.

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 10). 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 26).

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

• For information about SAML selections, see “SAML Name ID Selections” next.

• For information about WS-Federation selections, see “WS-Federation Name ID Selections” on page 156.

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 12).

**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 133).

  To set up an attribute contract to use in conjunction with an opaque identifier, select 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 10).

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, select the checkbox next to “Include attributes . . .” after selecting **Transient**.

**To reach this screen:**

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

2. Click **Browser SSO** under the SP Connection tab.

3. Click **Configure Browser SSO**.

4. Click **Assertion Creation** under the Browser SSO tab.

5. Click **Configure Assertion Creation**.

6. Click **Identity Mapping** on the Summary screen.

**WS-Federation Name ID Selections**

For WS-Federation purposes a name identifier is a uniquely identifying user attribute.

Make one of the selections described below:

- **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 176).

**Creating an Attribute Contract**

An attribute contract is the set of user attributes that you and your partner have agreed will be sent in SAML assertions for this connection (see “Attribute Contracts” on page 13). You identify these attributes on this screen.

If you are sending a “standard” name identifier (see “Choosing an Identity Mapping Method” on page 154), 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 173).

**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 154).
To reach this screen:

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

2. Click Browser SSO under the SP Connection tab.

3. Click Configure Browser SSO.

4. Click Assertion Creation under the Browser SSO tab.

5. Click Configure Assertion Creation.

6. Click Attribute Contract on the Summary screen.
   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 154).

Note: This screen is different for SAML 1.x and WS-Federation configurations. Attribute Name Format is not part of the specifications. In addition, for WS-Federation, the Subject Name Format is determined by the previous screen (see “WS-Federation Name ID Selections” on page 156).

To add an attribute:

1. Enter the attribute name in the text box.
   Attribute names are case-sensitive and must correspond to the attribute names expected by your partner.

   Tip: You can add a special attribute, SAML_AUTHN_CTX, to indicate to the SP (if required) the type of credentials used to authenticate to the IdP application (see “Authentication Context” in the “Supported Standards” chapter of Getting Started). Map a value for the authentication context on the attribute-mapping screen later in the configuration, from any available attribute source (see “Attribute Contract Fulfillment” on page 173).

2. (Optional) For SAML 2.0 connections, select the Attribute Name Format.
   Change the default Name Format selection if you and your SP partner have agreed to a specific format (see “Name Formats” on page 13).

3. Click Add.
(Optional) For SAML connections, to modify the Subject Name Format:

- Make your selection in the drop-down list and click Done.

  The default selection is usually applicable, unless you and your partner have agreed to a different format specification (see “Name Formats” on page 13).

Note: This selection is not available if you are sending a pseudonym as the subject, or a transient identifier (see “Choosing an Identity Mapping Method” on page 154).

To modify an attribute name or format:

1. Click Edit under Action for the attribute.
2. Make the change 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 the configuration steps.

To delete an attribute:

- Click Delete under Action for the attribute.

IdP Adapter Mapping

IdP adapters are responsible for handling user authentication as part of an SSO operation (see “SSO Integration Kits and Adapters” on page 9). A configured and deployed adapter in PingFederate is known as an adapter instance. The same instance may be mapped by multiple connections.

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 PingFederate 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 instances of IdP adapters. If you have not yet configured an instance of the adapter you intend to use within this SP connection, see “Configuring IdP Adapters” on page 130.
To modify an existing Adapter Instance:

△ Click its Name link.

To begin configuring an Adapter Instance for this connection:

△ Click Map New Adapter Instance.

To reach this screen:

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

2. Click Browser SSO under the SP Connection tab.

3. Click Configure Browser SSO.

4. Click Assertion Creation under the Browser SSO tab.

5. Click Configure Assertion Creation.

6. Click IdP Adapter Mapping on the Summary screen.

Selecting an Authentication Type

Single-factor authentication uses one type of information, typically something the user knows such as a username and a password, to authenticate the user. Two-factor authentication combines two different methods to authenticate the user. For example, the user proves their identity with a userid and password as well as a credential such as a certificate or a token.

**Note:** Currently, Ping Identity only supports the VeriSign Identity Protector (VIP) Integration Kit Adapter (available separately) for the second authentication factor.
Chapter 5
Identity Provider SSO Configuration

► Make the relevant selection and click **Next** to continue.

**To reach this screen:**
1. Click the connection name on the Main Menu.
   Click **Manage All SP**, if needed, to see a full list of connections.
2. Click **Browser SSO** under the SP Connection tab.
3. Click **Configure Browser SSO**.
4. Click **Assertion Creation** under the Browser SSO tab.
5. Click **Configure Assertion Creation**.
6. Click **IdP Adapter Mapping** on the Summary screen.
7. Click the Adapter Instance Name.
8. Click **Authentication Type** on the Summary screen.

**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 130).

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 Assertion Mapping screen (see “Selecting Assertion Mapping” on page 162).

Choose an **Adapter Instance** from the drop-down list and click **Next**.

To create or change an adapter instance, as needed, click **Manage Adapter Instances**.

- Two additional screens appear in the sequence if you use two-factor authentication (see “Selecting the First-Factor Identifier” on page 161 and “Selecting the Secondary Adapter Instance” on page 162).
- If you are using single-factor authentication, select assertion mappings next (see “Selecting Assertion Mapping” on page 162).

**To reach this screen:**
1. Click the connection name on the Main Menu.
   Click **Manage All SP**, if needed, to see a full list of connections.
2. Click **Browser SSO** under the SP Connection tab.
3. Click **Configure Browser SSO**.
4. Click **Assertion Creation** under the Browser SSO tab.
5. Click **Configure Assertion Creation**.
6. Click **IdP Adapter Mapping** on the Summary screen.
7. Click the Adapter Instance Name.
8. Click **Adapter Instance** on the Summary screen.

### Selecting the First-Factor Identifier

On the First Factor ID screen, attributes returned by the adapter instance you select on the Adapter Instance screen appear in the First-Factor Identifier drop-down list. If you need to identify the subject (for example, `userid`) to pass from the first adapter to the second adapter, select that attribute here.

*Important:* For the VeriSign Identity Protector (VIP) Adapter, the attribute used to uniquely identify the subject must be passed as the First-Factor Identifier (for example, `userid`). Be sure to select the attribute that represents the unique identifier.

This screen appears only if you chose Two-Factor Authentication on the Authentication Type screen.

To reach this screen:

1. Click the connection name on the Main Menu.
2. Click **Manage All SP**, if needed, to see a full list of connections.
3. Click **Browser SSO** under the SP Connection tab.
4. Click **Configure Browser SSO**.
5. Click **Assertion Creation** under the Browser SSO tab.
6. Click **Configure Assertion Creation**.
7. Click **IdP Adapter Mapping** on the Summary screen.
8. Click **Adapter Instance** on the Summary screen.
9. Click **First Factor ID** on the Summary screen.

- Select an attribute (when applicable) from the drop-down list and click **Next**.
Selecting the Secondary Adapter Instance

The secondary adapter instance defines the second type of authentication during the two-factor authentication process.

**Note:** Only certain adapters are allowed as secondary authentication types.

This screen appears only if you chose Two-Factor Authentication on the Authentication Type screen.

Choose the secondary Adapter Instance from the drop-down list and click Next.

To create or change an adapter instance, as needed, click Manage Adapter Instances.

**To reach this screen:**
1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Secondary Adapter Instance on the Summary screen.

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 “SSO Integration Kits and Adapters” on page 9).

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

**Note:** If you are using two-factor authentication, the attributes supplied by both adapters are shown under Adapter Contract. PingFederate appends the adapter instance ID to these values. For example, the email attribute appears as email_AdapterInstanceName.
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 164).

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 176).

To reach this screen:

1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Assertion Mapping on the Summary screen.

Tip: To determine whether you need to look up additional values, compare the attribute contract against the adapter contract (see “Creating an Attribute Contract” on page 156 and “IdP Adapter Mapping” on page 158). If the attribute contract requires more information, determine whether 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 176.)
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 156). 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 configure an attribute source:

1. 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.

To reach this screen:

1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
Managing SP Connections

7. Click the Adapter Instance Name.
8. Click **Attribute Sources & User Lookup** under the IdP Adapter Mapping tab.
   If this step is not listed, then this instance is configured to use adapter values only (see “Selecting Assertion Mapping” on page 162).

**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 166  
                  • “Configuring a Database Filter (WHERE Clause)” on page 168 |
| LDAP            | • “Configuring an LDAP Directory Search” on page 170  
                  • “Configuring an LDAP Filter” on page 171 |
| Custom          | • “Configuring Custom Source Filters” on page 173  
                  • “Selecting Custom Source Fields” on page 173 |


**Selecting a Data Store**

This screen allows you to choose a data store from a previously configured list (see “Managing Data Stores” on page 93). 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 156).
To reach this screen:
1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Attribute Sources & User Lookup under the IdP Adapter Mapping tab.
   If this step is not shown, you have elected not to look up attributes in data stores
   (see “Selecting Assertion Mapping” on page 162).
9. 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 it (see “Managing Data Stores” on
page 93).

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 156). 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 the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Attribute Sources & User Lookup under the IdP Adapter Mapping tab.
   If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 162).
9. Click the attribute source Description link.
10. Click Database Table and Columns.

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 Attribute.

Tip: Click Refresh if you are updating an existing configuration and changes may have been made to the database.

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 filter (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] [AND ...]
```

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 166).

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 130).

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

**Tip:** Click “View List of 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.
To reach this screen:

1. Click the connection name on the Main Menu. 
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click Attribute Sources & User Lookup under the IdP Adapter Mapping tab.
   If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 162).
7. Click the attribute source Description link.
8. 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 173).
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 the connection name on the Main Menu.
   
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Attribute Sources & User Lookup under the IdP Adapter Mapping tab. If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 162).

9. Click the attribute source Description link.

10. 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 165.

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 170).

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 130).

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.
Chapter 5
Identity Provider SSO Configuration

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 the connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Attribute Sources & User Lookup under the IdP Adapter Mapping tab.
   - If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 162).
9. Click the attribute source Description link.
10. Click LDAP Filter from the steps list.
    - If you have not yet defined an LDAP data store, see “Selecting a Data Store” on page 165.
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 99).

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 156). 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.

<table>
<thead>
<tr>
<th>Attribute Contract</th>
<th>Source</th>
<th>Value</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAML_SUBJECT</td>
<td>Adapter</td>
<td>username</td>
<td>None available</td>
</tr>
<tr>
<td>email</td>
<td>Adapter</td>
<td>email</td>
<td>None available</td>
</tr>
<tr>
<td>name</td>
<td>Adapter</td>
<td>name</td>
<td>None available</td>
</tr>
<tr>
<td>frame</td>
<td>Adapter</td>
<td>frame</td>
<td>None available</td>
</tr>
</tbody>
</table>
Map each 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 (see “SSO Integration Kits and Adapters” on page 9).
  
  For example, you might choose the adapter attribute `username` to map to `SAML_SUBJECT`.

- **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 170, “Selecting a JDBC Database Table and Columns” on page 166, or “Configuring Custom Source Filters” on page 173).

- **Expression (when enabled)**
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.

- **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.

  **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 requested SSO access; this variable is available only if specified as a query parameter for the relevant PingFederate endpoint (either as `TargetResource` for SAML 2.0 or `TARGET` for SAML 1.x—see “Application Endpoints” on page 373).

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.

To reach this screen:

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

2. Click **Browser SSO** under the **SP Connection** tab.

3. Click **Configure Browser SSO**.

4. Click **Assertion Creation** under the **Browser SSO** tab.

5. Click **Configure Assertion Creation**.

6. Click **IdP Adapter Mapping** on the **Summary** screen.

7. Click the **Adapter Instance Name**.
8. Click **Attribute Sources & User Lookup** under the IdP Adapter Mapping tab. If this step is not shown, you have elected not to look up attributes in data stores (see “Selecting Assertion Mapping” on page 162).

9. Click the attribute source Description link.

10. Click **Attribute Contract Fulfillment** from the steps list. If you have not yet defined a data store, see “Selecting a Data Store” on page 165).

**To map attributes:**

1. Choose a **Source** for each **Target** attribute. See “Map each attribute to fulfill the Attribute Contract from one of these Sources:” on page 174.

2. Choose (or enter) a **Value** for each **Attribute**. 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**

When a data store is configured and the attribute mappings under Attribute Sources & User Lookup fail to complete the **attribute contract**, you can choose to configure a set of “failsafe” Attribute Contract Fulfillment mappings under IdP Adapter Mapping. (For example, you might configure a set of attributes to identify the SSO subject as a “guest” user at the SP.) The failsafe mapping is used instead of the mapping configured with the data-store setup.

**Important:** The attribute contract is fulfilled using either the mapping configured under Attribute Sources & User Lookup or the failsafe mapping, not both. In other words, you cannot use the failsafe mapping to fill in missing attributes when some are found via the data-store mapping setup but others are not.

**Important:** The failsafe mapping is used only when **all** of the mappings configured in the data-store setup fail to return values for any reason. If any mapping succeeds (an attribute mapped to text, for example), failover does not occur.

Alternatively, you can have PingFederate stop the SSO transaction. This choice depends on your agreement with the SP.
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.

To reach this screen:

1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Failsafe Attribute Source on the Summary screen.
   This step appears only if you are using data stores (see “Selecting Assertion Mapping” on page 162).

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 175) or if you choose not to set up attribute sources (see “Selecting Assertion Mapping” on page 162).

Map each 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 (see “SSO Integration Kits and Adapters” on page 9).
  For example, you might choose the adapter attribute username to map to SAML_SUBJECT.

- Expression (when enabled)
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.
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.

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 requested SSO access; this variable is available only if specified as a query parameter for the relevant PingFederate endpoint (either as `TargetResource` for SAML 2.0 or `TARGET` for SAML 1.x—see “Application Endpoints” on page 373).

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.

To map attributes:
1. Choose a Source for each Target attribute (see descriptions of each Source under “Map each attribute to fulfill the Attribute Contract from one of these Sources” on page 176).
2. Choose (or enter) a Value for each Attribute.
   All values must be mapped.
3. Click Next.

To reach this screen:
1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Assertion Creation under the Browser SSO tab.
5. Click Configure Assertion Creation.
6. Click IdP Adapter Mapping on the Summary screen.
7. Click the Adapter Instance Name.
8. Click Attribute Contract Fulfillment on the Summary screen.
   If you are using data stores for attribute mapping and this step does not appear, see “Specifying a Failsafe Attribute Source” on page 175.
Chapter 5
Identity Provider SSO Configuration

Configuring Protocol Settings

The Protocol Settings screen provides the launching point for configuring bindings, partner endpoints, and other settings needed for the selected SAML profiles (if you are using SAML 2.0—see “Choosing Profiles (SAML 2.0)” on page 150). The screen also displays configured information.

(For WS-Federation, the configuration of bindings is not applicable.)

To configure Protocol Settings, 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 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

To configure Protocol Settings, 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 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

Important: After modifying Protocol Settings, you must click Done on the Protocol Settings screen and then Save on the Browser 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 150).
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.</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 for editing:
1. Click a connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Assertion Consumer Service URL on the Summary screen.

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 146).
4. For SAML 2.0 connections, if this is the default (or only) endpoint, select 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 for editing:**

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

2. Click **Browser SSO** under the SP Connection tab.

3. Click **Configure Browser SSO**.

4. Click **Protocol Settings** on the Summary screen.

5. Click **Configure Protocol Settings**.

6. Click **Default Target URL** on the Summary screen.

**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 146).

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 152 or “Configuring SP-Initiated SLO” on page 152).

**Field Descriptions**

<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>
<tr>
<td>Response URL</td>
<td>(Optional) A location on this IdP to which logout responses are sent.</td>
</tr>
</tbody>
</table>
To reach this screen for editing:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click SLO Service URLs on the Summary screen.

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 146).
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:
   ▶ 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.

To reach this screen for editing:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Allowable SAML Bindings on the Summary screen.

**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.

### 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 for editing:

1. Click a connection name on the Main Menu. Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Artifact Resolver Locations on the Summary screen.
   
   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 146).
   
   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 18).

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 selection(s) and click **Next**, or just click **Next** 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 logout 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 for editing:
1. Click a connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click Browser SSO under the SP Connection tab.
3. Click Configure Browser SSO.
4. Click Protocol Settings under the Browser SSO tab.
5. Click Configure Protocol Settings.

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 Protocol Settings screen.

Editing and Saving Protocol Settings
On the Summary screen you can review or edit your Protocol Settings.

Important: When you finish editing existing settings, be sure to click Done on the Summary screen and then Save on the Protocol Settings screen. For a new connection, click Done and then click Next on the Protocol Settings screen. Save the entire connection on the Activation & Summary screen (see “Connection Activation and Summary” on page 212).

To reconfigure saved settings:
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 Protocol Settings screen.
3. Click Save on the Protocol Settings screen.
Editing and Saving Browser SSO Settings

On the Summary screen for Browser SSO, you can review or edit your SSO configuration.

---

**Important:** When you finish editing existing settings, be sure to click **Done** on the Summary screen and then **Save** on the Browser SSO screen. For a new connection, click **Done** and then click **Next** on the Browser SSO screen. Save the entire connection on the Activation & Summary screen (see “Connection Activation and Summary” on page 212).

---

**To reconfigure saved settings:**
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 Browser SSO screen.
3. Click **Save** on the Browser SSO screen.

Confuring 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 option (see “Choosing Connection Options” on page 145). Attribute queries are not dependent on single sign-on but may be used independently or in conjunction with Browser 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.
Chapter 5
Identity Provider SSO Configuration

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.

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 158). 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 166
- “Configuring a Database Filter (WHERE Clause)” on page 168

If you use a LDAP data store, see:

- “Configuring an LDAP Directory Search” on page 170
- “Configuring an LDAP Filter” on page 171

If you use a Custom data store, see:

- “Configuring Custom Source Filters” on page 173
- “Selecting Custom Source Fields” on page 173

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:

\[
\text{cn=John Smith,ou=service,ou=employee}
\]

then you could use any of these elements in your filter qualifier:

\[
\begin{align*}
\text{${SubjectDN}} & = \text{cn=John Smith,ou=service,ou=employee} \\
\text{${ou}} & = \text{service} \\
\text{${ou1}} & = \text{employee}
\end{align*}
\]

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.

- **Expression (when enabled)**
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.

- **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.

### 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 191).
Managing SP Connections

To configure attribute-query security policy for this partner:

- Check or clear the checkboxes 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.
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 connection configuration may involve any or all of the following:

- Configuring Back-Channel Authentication
- Configuring Digital Signature Settings
- Configuring Signature Verification Settings
- Selecting an Encryption Certificate (SAML)
- Selecting a Decryption Key (SAML)
To continue, 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 for editing:

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** under the SP Connection tab.

3. Click **Configure Credentials**.
4. Click **Back-Channel Authentication** on the Summary screen. 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.
   - **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 115). 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**.
Chapter 5
Identity Provider SSO Configuration

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 Certificate Authorities” on page 112).
   - 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 150) whenever outbound POST or redirect bindings are used. The step also is required for WS-Trust STS and for SSO if you chose to sign the SAML assertion, SAML response, or artifact resolution messages (see “Configuring Back-Channel Authentication” on page 191).
Managing SP Connections

To reach this screen for editing:
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 under the SP Connection tab.
3. Click Configure Credentials.
4. Click Digital Signing Settings on the Summary screen.
   This step does not appear if a 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 117).
2. (Optional) If you have agreed to send your public key with the SAML message, select the checkbox to include the certificate.

   **Important:** This checkbox is selected automatically for PingFederate Express connections (see “Finishing an Express Connection” on page 217).

3. (Optional) Select the Signing Algorithm from the drop-down list.
   The default selection, RSA SHA1, is the most commonly used. Make a different selection only if you and your connection partner have agreed to use a stronger algorithm.

Configuring Signature Verification Settings

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, as well as incoming SAML 1.1 or 2.0 tokens for WS-Trust STS processing.

Depending on your agreement with this SP, SSO assertions, SAML 2.0 artifacts, or SOAP messages might also require signatures.
Whenever signatures are required, PingFederate provides a choice of trust models, including an option to use anchored signature-verification certificates embedded in incoming messages (see “Trust Models” on page 19). When this option is chosen in Signature Verification Settings, you must provide the Subject DN for embedded certificates coming from this partner, and the Issuer CA certificate must be part of the PingFederate trusted store (see “Trusted Certificate Authorities” on page 112).

Alternatively, you may choose to use unanchored certificates, in which case you must import your partner’s public-key certificate during this configuration (or select it if it is already imported). To prevent any interruption of service due to an expired certificate, you can ask your partner for a new certificate in advance and import it as backup.

To continue, click Manage Signature Verification Settings.

To reach this screen for editing:
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 under the SP Connection tab.
3. Click Configure Credentials.
4. Click Signature Verification Settings on the Summary screen.
   - If this step does not appear, then your configuration does not require verification settings.

Choosing a Trust Model

This screen allows you to choose the Trust Model you want to use for signature verification (see “Trust Models” on page 19).

Depending on the selection, the next step in this task varies:
• For Anchored, the next step is to enter the Subject DN for your partner's certificate (see the next section, “Anchored Certificates: Specifying a Subject DN”).

**Important:** If you are using the Redirect binding for SLO, you cannot use anchored certificates because SAML 2.0 does not permit certificates to be included using this transport method.

• For Unanchored, the next step is to import your partner's certificate (see “Selecting Unanchored Certificates” on page 197).

To reach this screen for editing:
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 under the SP Connection tab.
3. Click Configure Credentials.
4. Click Signature Verification Settings on the Summary screen.
   If this step does not appear, then your configuration does not require verification settings.
5. Click Manage Signature Verification Settings.
6. Click Trust Model on the Summary screen.

**Anchored Certificates: Specifying a Subject DN**

When you choose to use an anchored certificate for signature verification, incoming SAML messages must contain the partner's verification certificate (see “Trust Models” on page 197). PingFederate verifies that the Issuer CA is trusted and checks to see that the embedded certificate's Subject DN matches the one specified on this screen. If so, PingFederate uses that certificate to verify the message signature.

![Image](image-url)

► You can either enter the Subject DN or extract it from your partner's certificate if the certificate is stored on an accessible file system.

**Important:** Ensure that you enter the Subject DN correctly or extract the DN from the correct partner certificate.
To extract the Subject DN from a certificate:
1. Click browse to select your SP partner's public certificate.
2. Click Extract.

To reach this screen for editing:
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 under the SP Connection tab.
3. Click Configure Credentials.
4. Click Signature Verification Settings on the Summary screen.
   If this step does not appear, then your configuration does not require verification settings.
5. Click Manage Signature Verification Settings.
6. Click Certificate Subject DN on the Summary screen.

Selecting Unanchored Certificates

On the Signature Verification Certificate screen, you identify your partner's imported public certificate and, optionally, a secondary certificate to use when the first expires (see “Trust Models” on page 19).

To reach this screen for editing:
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 under the SP Connection tab.
3. Click Configure Credentials.
4. Click Signature Verification Settings on the Summary screen.
   If this step does not appear, then your configuration does not require verification settings.
5. Click Manage Signature Verification Settings.
6. Click Signature Verification Certificate on the Summary screen.
To specify a verification certificate:
1. Select the certificate from the drop-down list.
   If you have not yet imported the certificate into PingFederate, click Manage Certificates.
2. (Optional) 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 185).

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 190).

To reach this screen for editing:
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 under the SP Connection tab.
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 185).

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 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” 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>SAML ENC</th>
<th>Configuring ‘saml2’ SP Connection</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

To reach this screen for editing:

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** under the SP Connection tab.

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 185).
Managing SP Connections

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 117).

**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 24). Detailed configuration of this feature begins on the SaaS Provisioning screen.

**Note:** This configuration task is presented in the administrative console only when SaaS Provisioning has been enabled and selected as an option for the current connection (see “Choosing Connection Options” on page 145). For new connections, you must first configure Browser SSO and Credentials settings (see “Identity Provider SSO Configuration” on page 129).
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).

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.

Note: When you first enter or change credentials and click Next, PingFederate immediately tests connectivity to the target.

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 201). 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 85).

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 204).

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 212).

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]

**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 99).

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 209).
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 99).

### 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 101).
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. |
### Specifying a Source Location

Indicate on the Source Location screen where PingFederate should look for user records in the data store. The same location may be used to retrieve user-group DNs for maintaining corresponding groups at the SaaS provider.

**Note:** Group provisioning is supported for the Google Apps Connector (version 2.0 and higher) but may not be supported for other SaaS Connectors. If not, the associated fields on the Source Location screen are grayed out. Support for the feature may become available in future Connector releases; contact Ping Identity Support (support.pingidentity.com) for more information.

After specifying the required Base DN, you have two options for indicating which users and user groups (optionally) are to be provisioned. In each case, the search can be based either on group membership (the containing Group DN in the case of user groups) or on a specified LDAP filter. 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: <strong>Active Directory Bitmap</strong> – For Active Directory, which uses a bitmap for each user entry. <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>Base DN</td>
<td>The base Distinguished Name of the tree structure where user records and user groups are stored. PingFederate looks only at this node level or below it for user accounts and groups that need to be provisioned.</td>
</tr>
<tr>
<td>Group DN</td>
<td>For Users, the group Distinguished Name associated with the user store, if applicable—required if a Filter is not used (see below). (Optional) For Groups, the DN of the higher-level group that contains the user groups, if applicable. <strong>Important:</strong> If a Group DN is used for Active Directory Groups, the Windows Server 2003 domain functional level must be set to Windows 2000 native or Windows Server 2003. For Windows Server 2008, use one of the 2003 levels or choose Windows Server 2008. (Refer to Windows Server documentation or support for more information.)</td>
</tr>
<tr>
<td>Filter</td>
<td>An LDAP search filter—for Users, required if a Group DN is not used; optional for Groups. 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 Base DN.
2. For Users, enter either a Group DN or a Filter (or both if needed).
3. (Optional) For **Groups**, enter either a Group DN or a Filter (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.

**Important:** Refer to connection-template setup steps in your SaaS Connector **Quick Connection Guide** for information about any special fields and how to map them.
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 391).

### Specifying Mapping Details

On this screen, you define specific mapping information for each field required for provisioning (and for any optional fields, as needed).
To define mapping information for an attribute:

1. (Optional) 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 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 for certain attributes, as needed: that is, 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 391.

   **Important:** The use of OGNL expressions may not be enabled for your PingFederate installation (see “Enabling/Disabling Expressions” on page 392).

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).
   - **Parsing-->Extract CN from DN** – For attributes in the form of a Distinguished Name (for example, Group DNs in Active Directory), maps only the Common Name portion of the DN.
   - **Parsing-->Extract Username from Email** – For attributes containing an email address, maps only the username.

   **Tip:** Refer to your SaaS Connector **Quick Connection Guide** for instructions on mapping options or requirements for particular provisioning fields.

---

**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 needed by the SaaS provider to grant permissions.
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 212).

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 90). 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 may 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 under the SaaS Channels tab.
  - 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.

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, as well as access to the WS-Trust STS for Web Service Clients associated with this connection.

**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 373.

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 under the SP Connection tab.
   - 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 10).

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 SAML_SUBJECT of assertions sent to all of the SP partners contained in this affiliation.

**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 158).

You can create or modify an SP affiliation from the Main Menu or from a list of affiliations (click **Manage All Affiliations**).
Defining SP 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](image)

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>
<tr>
<td>Affiliation Owner</td>
<td>Any SAML 2.0 SP connection may serve as the Owner.</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.
Using the Express Connection Template

- 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 158).

- 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**.

**Important:** Be sure to click **Save**. Otherwise, the status will not be changed.

**To edit a connection:**

1. Click the heading above the information you want to modify.
2. Make your change and click **Save**.

Using the Express Connection Template

When creating a new connection, an administrator can choose to load the PingFederate Express template (see “About PingFederate Express” on page 21). This template configures most browser-based SSO settings automatically for an Express-enabled SP partner, who can then use the exported metadata for rapid end-to-end SSO configuration and deployment.
This section provides step-by-step instructions for filling in the minimal site-specific information needed after you select the template, and then for exporting the metadata.

**Important:** The PingFederate Express SP software supports a basic, lightweight configuration needed for simplified end-to-end deployment of SAML 2.0 IdP- and SP-initiated SSO, exclusively. While some minor settings may be modified for an Express SP connection (as indicated in the following section), an IdP administrator cannot extend the configuration to include broader use cases such as different protocols or bindings, WS-Trust STS, provisioning, or SLO. Although these and other features are not explicitly disabled, the connection metadata cannot be exported if any unsupported extensions are included.

---

**Finishing an Express Connection**

After selecting the PingFederate Express template, two site-specific setups must be completed, including at least one IdP adapter instance and the selection of a signing certificate for SAML assertions.

**Tip:** The administrative console guides you to required configuration steps automatically by displaying prompts (in the form of error messages) at entry points for the task flows (see “About Tasks and Steps” in the “Console Navigation” chapter of *Getting Started*).

Once the connection is saved, you can export its metadata into a configuration ZIP file for your partner to use when setting up PingFederate Express (see “About PingFederate Express” on page 21).

**To complete a PingFederate Express SSO Connection:**

1. After selecting the PingFederate Express template on the Connection Template screen, enter the Target Application URL (see “Choosing a Connection Template” on page 143 or the online Help page).

**Important:** You cannot return to this screen and change the URL (or make a different selection). If the target URL should change at the SP site in the future, you will need to create a new connection and send a new configuration file for the SP administrator to reload into PingFederate Express.

2. (Optional) On the General Info screen, enter further identifying information about this SP partner.
   
   You may also use a Virtual Server ID or adjust the Logging Mode. (See “Federation Server Identification” on page 27 and “Transaction Logging Modes” on page 35, respectively; or see the online Help pages.)

3. On the Browser SSO screen, click **Configure Browser SSO**.
4. On the Assertion Creation screen, click **Configure Assertion Creation**.

5. (Optional) If you wish to extend the **Attribute Contract**, click that step. For more information, see “Creating an Attribute Contract” on page 156 or the online Help page.

6. On the IdP Adapter Mapping screen, click **Map New Adapter Instance**.

7. Follow procedures to map an Adapter Instance (see “IdP Adapter Mapping” on page 158 or the online Help pages).

8. Map additional Adapter Instances as needed.

9. Click **Done** on the IdP Adapter Mapping screen and **Done** again on the Assertion Creation screen.

10. On the Browser SSO screen, click **Next** to reach the Credentials screen.
11. Click **Configure Credentials**.

12. On the **Digital Signature Settings** screen, select a signing certificate to use for this partner.

For more information, see “Configuring Digital Signature Settings” on page 194 or the online Help page.

**Important:** Retain the check-box selection to include the certificate (public key).

**Tip:** If you choose a CA-signed certificate, the SP Express installation will automatically use an anchored-certificate trust model (see “Trust Models” on page 19), and the CA certificate will be sent along with the verification (public-key) certificate in the exported metadata. If you choose a self-signed certificate, the SP installation will use an unanchored-certificate trust model, which means you and the SP will need to reconfigure when the certificate expires or is updated.

13. Click **Done** and then **Next** to reach the Activation & Summary screen.

14. Activate (optional) and **Save** the connection.

For more information, see “Connection Activation and Summary” on page 212 or the online Help page.

**To export metadata for your partner’s configuration, either:**

- On the Main Menu under Administrative Functions, click **Metadata Export** and follow the steps, selecting the desired Express connection on the Connection Metadata screen.

  See “Exporting Metadata” on page 42 or the online Help pages.

- **Or:**

  1. On the Main Menu under SP Connections, click **Manage All SP**.
  2. On the Manage Connections screen, click **Export Metadata** under Action for the Express connection.
  3. Save the ZIP file.

Your Express partner needs the exported ZIP file to configure the SP end of the connection.
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 21). 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 85).

Once Auto-Connect is enabled on your PingFederate server, 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 assertion 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 21); 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 91). If you use a different certificate, ensure that it meets Auto-Connect validation requirements (see “Auto-Connect Security Model” on page 23).

#### 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 117).

2. (Optional) Select the **Signing Algorithm** from the drop-down list.
   - The default selection, RSA SHA1, is the most commonly used. Make a different selection only if you and your connection partner have agreed to use a stronger algorithm.

### Configuring Assertion Creation

Configuring **assertion** creation for Auto-Connect is similar to configuring the same settings for regular partner connections.
Configuring SP Auto-Connect

Click **Configure Assertion Creation** to continue.

For configuration information, refer to sections under “Assertion Creation” on page 153.

**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.

---

**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 92).

2. Change the information and click **Save**, if available.

   If **Save** is not available, additional 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.

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 21.) 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 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 85).

Note that only one connection is needed per partner, even if you are integrating more than one Web application. You can configure more than one connection, however, if your partner supports multiple protocols, or supports multiple federation IDs for the same protocol (see “Federation Server Identification” on page 27).

Under some conditions, you can enable SSO for an unlimited number of partners at once by configuring a single, common connection (see “Using Auto-Connect” on page 21).

This chapter covers the following major topics:
- “Application Integration Settings” on page 226
- “Federation Settings” on page 234
- “Managing IdP Connections” on page 237
- “Configuring IdP Auto-Connect” on page 302
Chapter 6
Service Provider SSO 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 “SSO Integration Kits and Adapters” on page 9).

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.

**Note:** If your PingFederate configuration enables the WS-Trust STS, the selections under Application Integration Settings also include a link for configuring plug-in Token Generators (see “Configuring Token Generators” on page 338).

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 “SSO Integration Kits and Adapters” on page 9). 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 359 or “Configuring the IdP LDAP Adapter” on page 367, 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 Adapter Instances” on page 230).

SP adapter setup is available only if your server is configured as an SP (see “Choosing Roles and Protocols” on page 85).

**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 238). Errors indicating reconfiguration points may be presented.
To create a new adapter instance:

- Click **Create New Instance**.

  See the next section.

To edit an adapter instance:

- Click the Instance Name link.

To delete an adapter instance:

1. Click **Delete** next to the Instance Name on the Manage SP Adapter Instances screen. (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.

**Creating an Adapter Instance**

On the 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 SSO Configuration

Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance Name</td>
<td>A descriptive name for the adapter instance—for example the target application or group of applications.</td>
</tr>
<tr>
<td>Instance ID</td>
<td>An internal identifier for the adapter instance. Must be alphanumeric with no spaces.</td>
</tr>
<tr>
<td>Type</td>
<td>A list of previously deployed session creation adapter types that are available to create an adapter instance for the server. You can configure any number of instances for a server acting as an SP.</td>
</tr>
</tbody>
</table>

To reach this screen:
1. Click Adapters on the Main Menu.
2. Click Create New Instance on the Manage SP Adapter Instances screen.

To define an adapter instance:
1. Enter the Instance Name and Instance Id on the Type screen.
2. Select the Type from the drop-down menu.

   If the adapter you need is not listed, click Visit PingIdentity.com for additional types to see if a suitable adapter is available from the PingFederate download site. You can also create your own adapter (see “SSO Integration Kits and Adapters” on page 9).

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 “SSO Integration Kits and Adapters” on page 9). For information about configuring the adapters packaged with PingFederate, see “OpenToken Adapter Configuration” on page 357 or “LDAP Adapter Configuration” on page 365.

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

To view or modify adapter settings:
- Click the Instance Name.

To delete an adapter instance:
1. Click Delete next to the 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 “SSO Integration Kits and Adapters” on page 9).

▶ For information about configuring the OpenToken Adapter, see “Configuring the SP OpenToken Adapter” on page 361.

▶ For information about configuring the LDAP Authentication Service, see “Configuring the SP LDAP Adapter” on page 370.

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 357.

▶ For information about actions available using the LDAP Authentication Service, see “LDAP Adapter Configuration” on page 365.

To reach this screen for editing:

1. On the Main Menu under Application Integration Settings for My SP Configuration, click Adapters.
2. Click an Instance Name.
3. Click Actions (if available).

To generate a properties list:

▶ Click Download 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 Instance Name.
3. Click Extended 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 SP 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 SP Adapter Instances screen.

To save an adapter instance:
1. Click Done on the Summary screen.
2. Click Save on the Manage SP 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 Adapter Instances” next).

Mapping URLs to 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 376). (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:

a. http://yourapp.com/subapp/* Adapter 1

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 My SP 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 226).

**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. 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.
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 376); 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 72).
Setting Target Validation

Several SP adapters can be configured to pass security tokens or other user credentials from PingFederate to the target resource via HTTP query parameters or POST transmittal. In both cases, these transport methods open the possibility that a third party (with specific knowledge of aspects of the IdP and/or SP network, as well as PingFederate endpoints and configuration) might be able to obtain and use valid security tokens to gain improper access to the target resource.

This potential security vulnerability would involve using well-formed SSO links to start an SSO request for a resource at the SP site. However, the target resource designated in the link would be intended to intercept the security token by redirection to a malicious Web site.

To prevent such an attack, PingFederate provides a means of validating SSO transactions to ensure that the designated target resource exists in a domain controlled by the SP.

**Note:** This configuration is optional, though recommended, if you have an SP adapter configured to use query parameters or POST transmittals. Adapter configurations that use cookies to pass session tokens do not pose any known security risks—target validation is not needed.
Chapter 6
Service Provider SSO Configuration

To reach this screen:

1. Click **Target Resource Validation** on the Main Menu.

To enable target resource validation:

1. Select the first checkbox.
2. Indicate whether to require HTTPS for query and POST transmittals.

   **Note:** This selection is recommended to ensure that target validation will always prevent message interception for this type of potential attack, under all conceivable permutations.

3. Enter the domain or IP address containing a target resource and click **Add**.
   Use the domain only, without qualifiers. For example:
   
   mycompany.com
   
   Using an initial wildcard and period for a domain name will cover multiple subdomains. For example:
   
   *.mycompany.com
   
   covers hr.mycompany.com or email.mycompany.com.

4. Repeat the previous step as needed.

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 “SSO Integration Kits and Adapters” on page 9).

**Note:** For specific parameters required or allowed for Application Endpoints, see “SP Endpoints” on page 376.
This screen also shows a Maintenance Endpoint that you can use to verify that the PingFederate server is running (see “System-Services Endpoints” on page 381).

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). 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.

**Note:** A **Format** query parameter must be set to a specified value for XASP (see “/sp/startAttributeQuery.ping” on page 380).

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 85). 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 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 an 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, WS-Federation, and/or WS-Trust STS endpoints—a pop-up window displays only those endpoints related to the federation protocols you have chosen (see “Choosing Roles and Protocols” on page 85). These endpoints are built into PingFederate and cannot be changed.

Your federation partners or STS clients need to know the applicable SP Services endpoints to communicate with your PingFederate server. Configured service endpoints for SAML connections are included in metadata export files (see “Exporting Metadata” on page 42).

The table below describes each endpoint:

Table 16: PingFederate SP 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>/sp/SLO.saml2</td>
</tr>
<tr>
<td></td>
<td>The URL that receives and processes logout requests and responses.</td>
</tr>
<tr>
<td>Assertion Consumer Service (SAML 2.0)</td>
<td>/sp/ACS.saml2</td>
</tr>
<tr>
<td></td>
<td>A SAML 2.0 implementation that receives and processes assertions from an IdP. The numbers reflect the index value PingFederate uses to handle each binding.</td>
</tr>
<tr>
<td>Artifact Resolution Service (SAML 2.0)</td>
<td>/sp/ARS.ssaml2</td>
</tr>
<tr>
<td></td>
<td>The SOAP endpoint that processes artifacts returned from a federation partner to retrieve the referenced XML message on the back channel. (See “Important” footnote in this table.)</td>
</tr>
<tr>
<td>Metadata Service</td>
<td>/sp/acssaml1</td>
</tr>
<tr>
<td></td>
<td>A SAML 1.x implementation URL that receives and processes assertions from an IdP.</td>
</tr>
<tr>
<td>Single Sign-on Service (WS-Federation)</td>
<td>/sp/prp.wsf</td>
</tr>
<tr>
<td></td>
<td>The WS-Federation implementation URL that receives and processes security tokens and SLO messages.</td>
</tr>
</tbody>
</table>
Chapter 6
Service Provider SSO Configuration

Managing IdP Connections

As an SP, you manage connection settings to support the exchange of federation-protocol messages (SAML, WS-Federation, or WS-Trust) with an IdP or STS client application at your site.

**Note:** If you are configuring a new connection only for WS-Trust STS, follow the sections in this part of the manual up to and including “General Information” on page 244. Then turn to “WS-Trust STS Configuration” on page 307.

These settings include:

- User attributes you expect to receive in an SSO assertion (including STS SAML tokens).
- 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 connection partner must have decided this information in advance (see “Federation Planning Checklist” on page 26). Your federation partner must supply some connection settings and other information (see “Configuration Data Exchange” on page 28).

**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 302).

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 226). 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 255). (No adapters are required for a connection that uses only the Attribute Query profile—see “Configuring the Attribute Query Profile” on page 289.)
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 93).

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 239).

![My SP Configuration](image)

Note that long connection names are truncated for this display and the list is limited to four connections, chronologically ordered according to most recently edited. The full connection names and a complete list are displayed on the Manage Connections screen (see “Using the Manage Connections Screen” on page 239).

**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 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 239). For information about virtual IDs, see “Federation Server Identification” on page 27.
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:

- Create a new connection.
- Modify or copy an existing connection.
- Continue working on a connection draft.
- Delete a connection—if it is not active or referenced in other parts of the configuration (In Use).
- Export individual connection configurations.

**Note:** The connection export function results in an XML file that you can modify and import into another PingFederate server acting in the same federation role (IdP or SP) at your site (see “Connection Management Service” on page 383). You can also automate this process (see “Automating Configuration Migration” on page 64).

- Export metadata about a connection to expedite your partner’s corresponding configuration (see “Exporting Metadata” on page 42).

On 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 35).

**Tip:** A green icon (✔️) next to a Connection Name indicates that the connection has been checked for configuration errors. For more information about connection-validation features associated with this screen, see “Managing Connection Validation” on page 241.
Managing IdP Connections

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.


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 27.

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 244).
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 Connection 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 acting in the same role (see “Connection Management Service” on page 383).
To export connection metadata:
1. Click Export Metadata under Action for the connection.
   This action takes you to the Export Metadata screen flow, with the connection selection preset (see “Exporting Metadata” on page 42).
2. Complete the steps remaining in the Export Metadata screen flow (starting at Step 4 under “To export connection metadata:” on page 43).

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

Managing Connection Validation
By default PingFederate automatically validates all existing connections before displaying the Manage Connections screen. This validation ensures that any updates to supporting components—adapters or data-store configurations, for example—have not invalidated any connection settings.

If such errors are found, a warning icon (⚠️) appears next to the Connection Name.

To correct errors:
► Click the Connection Name to reach the top-level task in which reconfiguration is needed, and to see the error message. Then navigate into deeper tasks using Configure . . . buttons to find a link to the screen that needs updating.

   (For more information about console navigation, see “About Tasks and Steps” in the “Console Navigation” chapter of Getting Started.)

Note that the connection validation time increases with the number of connections and when connections are configured to access data stores for adapter mapping. Consequently, there may be noticeable delays in displaying the Manage Connections screen. For this reason, PingFederate provides a way to turn off the automatic validation under Server Settings (see “Setting System Options” on page 89).

When validation is turned off, administrators can check connections manually on the Manage Connections screen. A question-mark icon (❓) indicates the
connection has not been validated. In addition, Action links are disabled (except for Delete, if the connection is Inactive and/or In Use). You may, however, still edit the connection by clicking its name.

When automatic validation is disabled, use one of the following procedures to validate connections:

To validate a single connection:

- Click ? next to the Connection Name.

**Note:** Validating a single connection does not check connectivity for any configured data-store lookups (see “Selecting an Adapter Data Store” on page 256). However, this check is performed when you access the connection for editing.

To validate all connections (including for data-store connectivity):

1. Click **Check All Connections for Errors**.
2. When prompted, click **Yes**.

### Choosing a Connection Type

Indicate on the Connection Type screen whether the connection to this partner is for Browser SSO, WS-Trust STS, or both (see “Connection Types” on page 5).

**Note:** You can add STS support to any existing SSO connection, or vice versa, at any time.

- Click **Browser SSO Profiles** and the Protocol (if necessary).
- Click **WS-Trust STS**.

If your federation deployment supports multiple protocols, then for new SSO connections you can also select the applicable protocol on the Connection Type screen (see “Choosing Roles and Protocols” on page 85).

**Note:** 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 configure a connection for secure Internet SSO, select Browser SSO Profiles and the Protocol (if necessary).
- To configure a connection for WS-Trust STS, make that selection.
Chapter 6
Service Provider SSO Configuration

- (Optional) If your PingFederate license manages connections by groups, then you can select a group for this connection. This option is not displayed for unrestricted or other types of licenses.

Choosing Connection Options

On the Connection Options screen, you can choose to enable User Provisioning in conjunction with Browser SSO (see “Express Provisioning” on page 25).

For SAML 2.0, you also have the option of configuring the Attribute Query profile, with or without SSO (see “Attribute Query and XASP” in the “Supported Standards” chapter of Getting Started).

Note: This screen is presented only for browser-based SSO connections (see “Choosing a Connection Type” on page 242).

- To create a connection for secure Internet SSO, ensure that Browser SSO is selected and 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 244). 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 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 35).
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 42). For STS-only connections, this ID can be any unique identifier.</td>
</tr>
</tbody>
</table>
Managing IdP Connections

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 27).

For an existing connection:

- If you are editing existing information, modify the fields as needed and click Save.

Configuring Browser-Based SSO

Browser-based SSO (also, Browser SSO) is another term for secure Internet SSO, which relies on a user’s Web browser and HTTP to broker XML identity-federation
messaging between an IdP and an SP (in contrast to WS-Trust STS messaging, which is typically application-driven across the back channel and does not require browser mediation).

To continue, click **Configure Browser SSO**.

## 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. Still others are required only based on certain selections. The PingFederate administrative console determines the required and optional steps based on the protocol and dynamically presents additional requirements or options based on selections.

The following sections provides sequential information about every step you might encounter while configuring browser-based SSO, 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 discussions also apply to the other protocols, unless otherwise indicated.

After configuring SSO settings, you will normally need to configure authentication credentials, the range of which depends on your SSO selections (see “Configuring Credentials” on page 291). Also, other configuration tasks may remain to be
configured for new or modified connections, depending on selected connection options (see “Choosing Connection Options” on page 243).

Important: For new connections you must completely configure these SSO settings and subsequent tasks before you can save the connection on the Activation & Summary screen. Until then, the configuration is temporary and can be lost; the console times out after several minutes of inactivity. At any time, 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).

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

SAML 2.0 SSO Configuration Steps
- “Choosing SAML Profiles” on page 249
- “User-Session Creation” on page 251
  - “Selecting an Identity-Mapping Method” on page 252
  - “Creating an Attribute Contract” on page 253
  - “Configuring Adapter Mapping and User Lookup” on page 255
- “Configuring Protocol Settings” on page 267
  - “Specifying SSO Service URLs (SAML)” on page 268
  - “Specifying SLO Service URLs (SAML 2.0)” on page 270
  - “Choosing Allowable SAML Bindings (SAML)” on page 271
  - “Setting an Artifact Lifetime (SAML 2.0)” on page 272
  - “Specifying Artifact Resolver Locations” on page 273
  - “Configuring Signature Policy” on page 274
  - “Configuring XML Encryption Policy (SAML 2.0)” on page 275

WS-Federation SSO Configuration Steps
- “User-Session Creation” on page 251
  - “Selecting an Identity-Mapping Method” on page 252
  - “Creating an Attribute Contract” on page 253
  - “Configuring Adapter Mapping and User Lookup” on page 255
- “Configuring Protocol Settings” on page 267
  - “Specifying a Service URL (WS-Federation)” on page 269

SAML 1.x SSO Configuration Steps
- “Choosing SAML Profiles” on page 249
- “User-Session Creation” on page 251
  - “Selecting an Identity-Mapping Method” on page 252
  - “Creating an Attribute Contract” on page 253
  - “Configuring Adapter Mapping and User Lookup” on page 255
- “Configuring Protocol Settings” on page 267
  - “Specifying SSO Service URLs (SAML)” on page 268
  - “Choosing Allowable SAML Bindings (SAML)” on page 271
  - “Specifying Artifact Resolver Locations” on page 273
Choosing SAML 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 26). For SAML 2.0, PingFederate supports all IdP- and SP-initiated SSO and SLO profiles. 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.

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.

**Note:** For SAML 1.x, IdP-initiated SSO is assumed and the specifications do not support SLO; the only choice on this screen is SP-initiated SSO (see “SAML 1.x Profiles” in the “Supported Standards” chapter of Getting Started).

For WS-Federation, the SAML Profiles screen is not presented.

**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 Browser SSO under the IdP Connection tab.
3. Click SAML Profiles on the Summary screen.

**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.
2. Continue through the remaining connection-configuration tasks.

**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 16).

For illustrations of typical profile and binding scenarios, see the “Profiles” sections in the “Supported Standards” chapter in Getting Started.

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 illustrations of typical profile and binding scenarios, see the “Profiles” sections in the “Supported Standards” chapter in Getting Started.

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.

Caution: 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

User-Session Creation

As an SP, you must specify how you will use information sent from the IdP in 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 253).
• Configuring instances of one or more adapters (see “Configuring Adapter Mapping and User Lookup” on page 255) and specifying how they are used to fulfill the adapter contract.

To continue, click Configure User-Session Creation.
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 10). 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 26).

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 277).
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, select the checkbox next to “The assertion includes attributes . . .” after selecting **Account Linking**.

**Tip:** An SP PingFederate uses a default, Hypersonic database to handle account linking. You can use your own database instead, as needed. For more information, see “Defining an Account-Linking Database” on page 98.

**To reach this screen:**

1. Click the connection name on the Main Menu. Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Browser SSO** under the IdP Connection tab.
3. Click **Configure Browser SSO**.
4. Click **User-Session Creation** under the Browser SSO tab.
5. Click **Configure User-Session Creation**
6. Click **Identity Mapping** on the Summary screen.

### Creating an Attribute Contract

An attribute contract is the set of user attributes that you and your partner have agreed will be sent in SAML assertions for this connection (see “Attribute Contracts” on page 13). 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 252).

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 16).
Managing IdP Connections

To reach this screen:
1. Click the connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
4. Click User-Session Creation under the Browser SSO tab.
5. Click Configure User-Session Creation
6. Click Attribute Contract on the Summary screen.

   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 252).

To add an attribute:
1. Enter the attribute name in the text box.
   Attribute names are case-sensitive and must correspond to the attribute names expected by your partner.
2. (Optional) Select the checkbox under Mask Values in Log.
3. Click Add.

To modify an attribute name or masking selection:
1. Click Edit under Action for the attribute.
2. Make the change 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 the configuration steps.

To delete an attribute:
1. Click Delete under Action for the attribute.

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 “SSO Integration Kits and Adapters” on page 9.)

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 Adapter Instances” on page 230).

<table>
<thead>
<tr>
<th>Adapter Instance Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP xmlns</td>
<td>Delete</td>
</tr>
</tbody>
</table>

To reach this screen:

1. Click the connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
4. Click User-Session Creation under the Browser SSO tab.
5. Click Configure User-Session Creation

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 226).

### 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 93).
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 266).

---

**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 253 and “Selecting an Adapter Instance” on page 256). 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 266.)

---

**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 258.

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 259  
                  • “Configuring a Database Filter (WHERE Clause)” on page 260 |
| LDAP            | • “Configuring an LDAP Directory Search” on page 262  
                  • “Configuring an LDAP Filter” on page 264 |
| Custom          | • “Configuring Custom Source Filters” on page 265  
                  • “Selecting Custom Source Fields” on page 265 |

3. See “Configuring Adapter Contract Fulfillment” on page 266

**Selecting a Data Store**

This screen allows you to choose a data store from a previously configured list (see “Managing Data Stores” on page 93). 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 255).
To reach this screen:

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

2. Click Browser SSO under the IdP Connection tab.

3. Click Configure Browser SSO.

4. Click User-Session Creation under the Browser SSO tab.

5. Click Configure User-Session Creation.

6. Click Adapter Mapping & User Lookup under the User-Session Creation tab.

7. Click the Adapter Instance Name.

8. Click Data Store on the Summary screen.
   - If this step is not present, then the use of a data store has not been selected (see “Selecting an Adapter Data Store” on page 256).

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 it (see “Managing Data Stores” on page 93).

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 260).
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 the connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Browser SSO** under the IdP Connection tab.
3. Click **Configure Browser SSO**.
4. Click **User-Session Creation** under the Browser SSO tab.
5. Click **Configure User-Session Creation**.
6. Click **Adapter Mapping & User Lookup** under the User-Session Creation tab.
7. Click the Adapter Instance Name.
8. Click **Database Table and Columns** on the Summary screen.
   
   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 258.

**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 Attribute.

   **Tip:** Click **Refresh** if you are updating an existing configuration and changes may have been made to the database.

   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 filter (see “Configuring a Database Filter (WHERE Clause)” next). Add only attributes from which you need actual values to pass to the adapter.

---

**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 256). Then determine what information is coming in from the assertion (see “Creating an Attribute Contract” on page 253). 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 156).
Chapter 6
Service Provider SSO 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 259).

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 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 the connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
4. Click User-Session Creation under the Browser SSO tab.
5. Click Configure User-Session Creation
6. Click Adapter Mapping & User Lookup under the User-Session Creation tab.
7. Click the Adapter Instance Name.
8. Click Database Filter on the Summary screen.
   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 258.

**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 256).
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 “SSO Integration Kits and Adapters” on page 9).

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 the connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
4. Click User-Session Creation under the Browser SSO tab.
5. Click Configure User-Session Creation.
6. Click **Adapter Mapping & User Lookup** under the User-Session Creation tab.

7. Click the Adapter Instance Name.

8. Click **LDAP Directory Search** on the Summary screen.
   
   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 258).

**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 262).

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 `$(variable)` 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 the connection name on the Main Menu.
   
   Click **Manage All IdP**, if needed, to see a full list of connections.

2. Click **Browser SSO** under the IdP Connection tab.

3. Click **Configure Browser SSO**.

4. Click **User-Session Creation** under the Browser SSO tab.

5. Click **Configure User-Session Creation**

6. Click **Adapter Mapping & User Lookup** under the User-Session Creation tab.

7. Click the Adapter Instance Name.

8. Click **LDAP Filter** on the Summary screen.
   
   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 258).
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 99).

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 256). 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 252). 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 253).

- **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 and Columns” on page 259, “Configuring an LDAP Directory Search” on page 262, or “Selecting Custom Source Fields” on page 265).

- **Expression (when enabled)**
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.
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 requested SSO access; this variable is available only if specified as a query parameter for the relevant PingFederate endpoint (either as TargetResource for SAML 2.0 or TARGET for SAML 1.x—see “Application Endpoints” on page 373).

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.

---

<table>
<thead>
<tr>
<th>Adapter Contract</th>
<th>Source</th>
<th>Value</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>Assertion</td>
<td>email</td>
<td>None available</td>
</tr>
<tr>
<td>First Name</td>
<td>Assertion</td>
<td>firstname</td>
<td>None available</td>
</tr>
<tr>
<td>Last Name</td>
<td>Assertion</td>
<td>lastname</td>
<td>None available</td>
</tr>
</tbody>
</table>

---

**To reach this screen:**

1. Click the connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
4. Click User-Session Creation under the Browser SSO tab.
5. Click Configure User-Session Creation.
6. Click Adapter Mapping & User Lookup under the User-Session Creation tab.
7. Click the Adapter Instance Name.
8. Click Adapter Contract Fulfillment on the Summary screen.
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 Protocol Settings

The Protocol Settings screen provides the launching point for configuring bindings, partner endpoints, and other settings needed for the selected SAML profiles (if you are using SAML—see “Choosing SAML Profiles” on page 249). The screen also displays configured information.

(For WS-Federation, the configuration of bindings is not applicable.)

To configure Protocol Settings, 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)
• The transport configurations (bindings) that you will use to send and receive data for 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

To continue, click Configure Protocol Settings.

Important: After modifying any settings, you must click Save on the Protocol Settings 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 250).

Field Descriptions

Field | Description
--- | ---
Binding (SAML 2.0) | The transport type agreed upon by you and your partner: Artifact, POST, or Redirect.
Endpoint URL | The location where your IdP receives SSO messages.

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 244).
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.

![WS-Federation Configuration Screen](image)

**To reach this screen for editing:**

1. Click a connection name on the **Main Menu**.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **Browser SSO** under the **IdP Connection** tab.
3. Click **Configure Browser SSO**.
4. Click **Protocol Settings** under the **Browser SSO** tab.
5. Click **Configure Protocol Settings**.
6. Click **Service URL** on the **Summary** screen.

**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 SAML Profiles” on page 249).
To reach this screen for editing:
1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click SLO Service on the Summary screen.

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 244).
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.
Chapter 6
Service Provider SSO Configuration

This configuration applies to all profile types (see “Choosing SAML Profiles” on page 249). You and your partner can agree to standardize on one binding type or select different bindings for different profile scenarios.

To reach this screen for editing:

1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Allowable SAML Bindings on the Summary screen.

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.
Managing IdP Connections

To reach this screen for editing:
1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Artifact Lifetime on the Summary screen.
   - This step appears only if you have selected the artifact binding for either a 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.

To reach this screen for editing:
1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Artifact Resolver Locations on the Summary screen.
   - This step appears only if you have selected the artifact binding for either a SSO or SLO Service at the IdP site.

Note that this screen is different for SAML 1.x implementations, for which only one endpoint is allowed.

To reach this screen for editing:
1. Click a connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
5. Click Configure Protocol Settings.
6. Click Artifact Resolver Locations on the Summary screen.
   - If this step does not appear, you do not have Artifact selected under Allowable SAML Bindings.
Chapter 6
Service Provider SSO Configuration

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 244).
   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.

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 244).
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 the 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 18).

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 selection(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-logout 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 for editing:
1. Click a connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click Browser SSO under the IdP Connection tab.
3. Click Configure Browser SSO.
4. Click Protocol Settings under the Browser SSO tab.
5. Click Configure Protocol Settings.

To define XML encryption:
1. Select Allow encrypted SAML Assertions and SLO messages.
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 Browser SSO screen.

Editing and Saving Protocol Settings
On the Summary screen you can review or edit your Protocol Settings.

Important: When you finish editing existing settings, be sure to
click Done on the Summary screen and then Save on the Protocol
Settings screen. For a new connection, click Done and then click
Next on the Protocol Settings screen. Save the entire connection on
the Activation & Summary screen (see “Connection Activation and
Summary” on page 302).

To reconfigure saved settings:
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 Protocol Settings screen.
3. Click Save on the Protocol Settings screen.
Editing and Saving Browser SSO Settings

On the Summary screen for Browser SSO, you can review or edit your SSO configuration.

Important: When you finish editing existing settings, be sure to click **Done** on the Summary screen and then **Save** on the Browser SSO screen. For a new connection, click **Done** and then click **Next** on the Browser SSO screen. Save the entire connection on the Activation & Summary screen (see “Connection Activation and Summary” on page 302).

To reconfigure saved settings:

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 Browser SSO screen.
3. Click **Save** on the Browser SSO screen.

User Provisioning

PingFederate’s Express Provisioning allows SPs to create user accounts “on the fly” during SSO events, based on attributes received from IdPs (see “Express Provisioning” on page 25). An SP can also use the feature to update existing user records.

![User Provisioning Configuration Table]

**Note:** This configuration task is presented in the administrative console only when User Provisioning is selected as an option (see “Choosing Connection Options” on page 243).

To continue, click **Configure User Provisioning**.
Service Provider SSO Configuration

Chapter 6

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 253).

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.

Identifying the User Repository

PingFederate’s Express Provisioning currently supports LDAP v3-compliant user stores and the JDBC-compliant Microsoft SQL Server 2005.

Note: We recommend using the latest version of the Microsoft SQL Server JDBC Driver (version 4 or higher), which is compatible with current and recent JDK versions.
Managing IdP Connections

Choose the Active Data Store 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 93).

If you are using an LDAP store, refer to the sections immediately following:

- “Specifying an LDAP User-Record Location”
- “Specifying an LDAP Filter” on page 280
- “Identifying Provisioning Attributes for LDAP” on page 281

If you are using MSSQL, skip to this section:

- “Selecting a SQL Method” on page 281

Specifying an LDAP 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 288). Start by specifying where user records are located in your data store.

Note: This screen appears only for LDAP data stores (see “Identifying the User Repository” on page 278).
Specifying an LDAP Filter

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.

**Note:** This screen appears only for LDAP data stores (see “Identifying the User Repository” on page 278).

The filter is in the form:

```
attribute=${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 264).

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 253). Variables for these attributes, including the correct syntax, are listed under Assertion Values.

**Note:** If you are unfamiliar with writing LDAP queries, please refer to the documentation accompanying your LDAP installation.
Identifying Provisioning Attributes for LDAP

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 “Mapping Attributes to User Accounts” on page 285).

<table>
<thead>
<tr>
<th>Root Object Class</th>
<th>Attribute</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>SELECT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** This screen appears only for LDAP data stores (see “Identifying the User Repository” on page 278).

**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 for multi-value attributes (see “Tip” above).

   **Important:** For the Sun Directory Server or Active Directory, the attribute objectClass must be among attributes added—select &lt;Show All Attributes&gt; under Root Object Class to locate and add this attribute.

2. Repeat the previous step for each attribute requiring provisioning.

**Selecting a SQL Method**

For JDBC data stores, PingFederate allows you to map attributes directly to a single database table (the default) or to SQL stored-procedure parameters.
Chapter 6
Service Provider SSO Configuration

 Depending on the selection, different steps appear under the User Provisioning task. Refer to the manual sections indicated below for more information:

- If you are mapping attributes directly to a Table, refer to the sections immediately following:
  - “Specifying a Database User-Record Location” (next)
  - “Specifying a Unique-ID Database Column” on page 283
- If you are using a Stored Procedure, skip to this section:
  - “Specifying a Stored-Procedure Location” on page 284

### Specifying a Database User-Record Location

For database provisioning to a table, indicate where PingFederate should write new user records or update existing ones (see “Choosing an Event Trigger” on page 288).

**Note:** This screen appears only for MSSQL data stores when Table is selected on the SQL Method screen (see the previous section, “Selecting a SQL Method”).
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schema</td>
<td>Select the table structures that store information within the database.</td>
</tr>
<tr>
<td>Table</td>
<td>Select the name of the database table that contains user records.</td>
</tr>
<tr>
<td>Columns to fulfill when provisioning</td>
<td>For the selected table, all attributes and their data types are displayed. All attributes must be mapped for the database insertion to succeed, although a null entry may be used for optional attributes (see “Mapping Attributes to User Accounts” on page 285).</td>
</tr>
</tbody>
</table>

Specifying a Unique-ID Database Column

PingFederate uses the column specified on this screen to check whether a user record already exists for the incoming assertion.

**Note:** This screen appears only when Table is selected on the SQL Method screen (see “Selecting a SQL Method” on page 281).
**Specifying a Stored-Procedure Location**

If you are using a stored procedure for provisioning the user database, specify its location on this screen.

**Important:** The database account used by PingFederate must have access to the schema in which the stored procedure is located, as well as execute permission for the procedure.

<table>
<thead>
<tr>
<th>Schema</th>
<th>dbo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stored Procedure</td>
<td>insertOrupdateuser_short</td>
</tr>
</tbody>
</table>

**Procedure parameters to fulfill**

- @userid: varchar
- @firstname: nchar
- @mint: int
- @real: real

**Note:** This screen appears only when Stored Procedure is selected on the SQL Method screen (see "Selecting a SQL Method" on page 281).
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schema</td>
<td>Select the table structure that contains stored procedures within the database.</td>
</tr>
<tr>
<td>Stored Procedure</td>
<td>Select the stored procedure needed to provision the user database.</td>
</tr>
<tr>
<td>Procedure parameters to fulfill</td>
<td>For the selected procedure, all parameters and their data types are displayed. You will map assertion values to the parameters on the next screen.</td>
</tr>
</tbody>
</table>

To see a list of attributes expected from SAML assertions, click **View Attribute Contract**.

If the list of parameters is not or might not be current (due to any recent procedure revisions), click **Refresh**.

### Mapping Attributes to User Accounts

The Attribute Fulfillment screen provides a means of mapping the values of incoming attributes into local account attributes or, for JDBC stores, into SQL stored-procedure parameter values (see “Selecting a SQL Method” on page 281). You can also provide values of your own for any data store attributes (except JDBC system-managed) or for SQL procedure parameters—either as hard-coded text or derived values based on assertion attributes.

For JDBC, this screen also provides a means of testing the insertion of attribute values into the database or stored procedure.

**Tip:** For mapping to a database date and time or small date and time column, if you are not using a stored procedure to convert the incoming string value, you may use a PingFederate Java conversion method via OGNL expressions (see “Using Attribute Mapping Expressions” on page 391). Note that expressions must be enabled to use the PingFederate conversion method—see “Enabling/Disabling Expressions” on page 392).
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 253).

- **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 278).
  To map an attribute-query value, use this syntax:
  \[ $(\text{query\_attribute}) \]
  You can also combine attribute-query values with references to attributes in the attribute contract. For example:
  \[ $(\text{query\_attribute})+\$(\text{attribute}) \]
  References to attributes not contained in the attribute contract result in an Attribute Query back to the IdP partner.

- **Expression** (when enabled—see “Enabling/Disabling Expressions” on page 392)
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute
Managing IdP Connections

Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.

Tip: For JDBC mapping, if the data type of a Target Attribute/Parameter is `datetime` or `smalldatetime`, you can use an expression to convert date-time strings from the assertion. After selecting Expression for such attributes, click **Datetime OGNL Examples** under the text box for syntax information and examples.

- **System Managed (if applicable)**
  This mapping option appears only when any automatically assigned JDBC attributes are among columns to be provisioned—for example, an identity or timestamp column for the MSSQL Server.

- **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.

Note: If no entry is required in a JDBC database for a column, you can leave the text box blank. A blank entry results in an empty string in the database for string data types and `null` for all other data types. Alternatively, for string types, you can enter `null` in the text box to explicitly set `null` in the table column.

### To map attributes:

1. Choose a Source for provisioning each Target Attribute or Target Parameter (see descriptions of each Source type above).

   Note: For JDBC table mapping, select System Managed as the Source for any columns that are automatically provisioned by the database server.

   Tip: For LDAP mapping, choose Text as the Source for the `objectClass` attribute.

2. Choose (or enter) a Value for each Attribute.
   All values must be mapped. However, for optional JDBC table columns, you may leave a text box blank (or, for string data types, enter `null` to avoid empty strings).

   Note that no value is required for System Managed attributes.

   Tip: For Active Directory, enter `user` in the text box for `objectClass`. For the Sun Directory Server, enter `inetOrgPerson`.

3. Click Done.

### To test the insertion of attributes into a JDBC table or stored procedure:

1. Click the **Test insert into . . .** or **Test call to . . .** link.
2. For each Target Attribute or Target Parameter (for a stored procedure), enter text into the boxes under Test Value and click Test Insert (or Test Stored Procedure Call).
   For table insertions, if the test is successful, a confirmation is displayed along with the values inserted. For stored procedures, only a confirmation is displayed if the test is successful, indicating that the procedure was populated with parameter values.

3. For table insertions, unless you wish to keep test values in the database, click Roll Back All Test Inserts.
   If you are using a stored procedure, this option is not provided since PingFederate cannot know the result of the procedure. Database rollback, if needed, must be handled manually.

4. When finished, click Next or Done; or click the link Return to Attribute Fulfillment to continue or change any mapping.

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 (for all assertions), an existing user account is always updated with incoming attributes.

**Note:** This screen does not appear for JDBC data stores if provisioning is accomplished using a stored procedure (see “Selecting a SQL Method” on page 281), because the procedure is always called for all assertions. The procedure should handle both provisioning new users and updating existing ones (if desired).

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 255).
Managing IdP Connections

When SSO is aborted, the user is redirected to an error page, and the failure is written to the log and added to the Transaction Failure Count at the bottom of 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 option (see “Choosing Connection Options” on page 243). Attribute queries are not dependent on single sign-on but may be used independently or in conjunction with Browser 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 244).

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 291).

This screen also allows you to mask incoming attribute values in log files (see “Attribute Masking” on page 16). 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 connection configuration may involve any or all of the following:

- Configuring Back-Channel Authentication
- Configuring Digital Signature Settings
- Configuring Signature Verification Settings
- Selecting an Encryption Certificate
- Selecting a Decryption Key
Chapter 6
Service Provider SSO Configuration

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.

This step also applies to attribute-request configurations, since this profile always uses the SOAP back channel (see “Choosing SAML Profiles” on page 249).

Note: A yellow triangle next to a listing indicates that you have not completely configured back-channel authentication requirements.
Managing IdP Connections

To reach this screen for editing:
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 under the IdP Connection tab.
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.
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 115). You will need to export the certificate (only) and send it to 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 Certificate Authorities” on page 112).
   • 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 SAML Profiles” on page 249) 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 291).

The step is not required for SAML 1.x IdP connections.

To reach this screen for editing:

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 under the IdP Connection tab.

3. Click Configure Credentials.

4. Click Digital Signature Settings on the Summary screen.

   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 274 and “Specifying Security Policy” on page 291).

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 117).

2. (Optional) If you have agreed to send your public key with the SAML message, select the checkbox to include the certificate.

3. (Optional) Select the Signing Algorithm from the drop-down list.

   The default selection, RSA SHA1, is the most commonly used. Make a different selection only if you and your connection partner have agreed to use a stronger algorithm.

Configuring Signature Verification Settings

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, as well as incoming SAML 1.1 or 2.0 tokens for WS-Trust STS processing.

Depending on your agreement with this IdP, SSO assertions, SAML 2.0 artifacts, or SOAP messages might also require signatures.

Whenever signatures are required, PingFederate provides a choice of trust models, including an option to use anchored signature-verification certificates embedded in incoming messages (see “Trust Models” on page 19). When this option is chosen in Signature Verification Settings, you must provide the Subject DN for embedded certificates coming from this partner, and the Issuer CA certificate must be part of the PingFederate trusted store (see “Trusted Certificate Authorities” on page 112).

Alternatively, you may choose to use unanchored certificates, in which case you must import your partner’s public-key certificate during this configuration (or select it if it is already imported). To prevent any interruption of service due to an expired certificate, you can ask your partner for a new certificate in advance and import it as backup.

To continue, click Manage Signature Verification Settings.

To reach this screen for editing:
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 under the IdP Connection tab.
3. Click Configure Credentials.
4. Click Signature Verification Settings on the Summary screen.
   - If this step does not appear, then your configuration does not require verification settings.

Choosing a Trust Model

This screen allows you choose the Trust Model you want to use for signature verification (see “Trust Models” on page 19).
Depending on the selection, the next step in this task varies:

- For **Anchored**, the next step is to enter the Subject DN for your partner's certificate (see the next section, “Anchored Certificates: Specifying a Subject DN”).

**Important:** If you are using the Redirect binding for SLO, you cannot use anchored certificates because SAML 2.0 does not permit certificates to be included using this transport method.

- For **Unanchored**, the next step is to import your partner’s certificate (see “Selecting Unanchored Certificates” on page 298).

To reach this screen for editing:

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** under the IdP Connection tab.
3. Click **Configure Credentials**.
4. Click **Signature Verification Settings** on the Summary screen.
   - If this step does not appear, then your configuration does not require verification settings.
5. Click **Manage Signature Verification Settings**.
6. Click **Trust Model** on the Summary screen.

**Anchored Certificates: Specifying a Subject DN**

When you choose to use an anchored certificate for signature verification, incoming SAML messages must contain the partner’s verification certificate (see “Trust Models” on page 19). PingFederate verifies that the Issuer CA is trusted and checks to see that the embedded certificate’s Subject DN matches the one specified on this screen. If so, PingFederate uses that certificate to verify the message signature.
You can either enter the Subject DN or extract it from your partner's certificate if the certificate is stored on an accessible file system.

**Important:** Ensure that you enter the Subject DN correctly or extract the DN from the correct partner certificate.

**To extract the Subject DN from a certificate:**
1. Click browse to select your IdP partner's public certificate.
2. Click **Extract**.

**To reach this screen for editing:**
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** under the **IdP Connection** tab.
3. Click **Configure Credentials**.
4. Click **Signature Verification Settings** on the **Summary** screen.
   - If this step does not appear, then your configuration does not require verification settings.
5. Click **Manage Signature Verification Settings**.
6. Click **Certificate Subject DN** on the **Summary** screen.

**Selecting Unanchored Certificates**

On the Signature Verification Certificate screen, you identify your partner's imported public certificate and, optionally, a secondary certificate to use when the first expires (see “Trust Models” on page 19).
To reach this screen for editing:

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 under the IdP Connection tab.
3. Click Configure Credentials.
4. Click Signature Verification Settings on the Summary screen.
   If this step does not appear, then your configuration does not require verification settings.
5. Click Manage Signature Verification Settings.
6. Click Signature Verification Certificate on the Summary screen.

To specify a verification certificate:

1. Select the certificate from the drop-down list.
   If you have not yet imported the certificate into PingFederate, click Manage Certificates.
2. (Optional) 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 273.

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 291).
Chapter 6
Service Provider SSO Configuration

To reach this screen for editing:

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 under the IdP Connection tab.
3. Click Configure Credentials.

If this step is not present, then you have either not configured this connection to use the SP-initiated SLO profile (see “Choosing SAML Profiles” on page 249) or you have chosen not to encrypt the assertion or the SAML SUBJECT (see “Configuring XML Encryption Policy (SAML 2.0)” on page 275).

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.
Managing IdP Connections

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 275).

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 under the IdP Connection tab.
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 275).

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 117).

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.

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, as well as access to the WS-Trust STS for Web Service Providers associated with this connection.

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 373.

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 under the IdP Connection tab.
   
   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 21). 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 85).
Once Auto-Connect is enabled on your PingFederate server, 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).

**Note:** The signing certificate is embedded in your server’s Auto-Connect metadata (see “Using Auto-Connect” on page 21); 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 91). If you use a different certificate, ensure that it meets Auto-Connect validation requirements (see “Auto-Connect Security Model” on page 23).

#### 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 117).

2. (Optional) Select the Signing Algorithm from the drop-down list.
   - The default selection, RSA SHA1, is the most commonly used. Make a different selection only if you and your connection partner have agreed to use a stronger algorithm.
Chapter 6  
Service Provider SSO Configuration

**Configuring User-Session Creation**

Configuring user-session creation for Auto-Connect is similar to configuring the same settings for regular partner connections.

![User-Session Configuration](image)

- Click **Configure User-Session Creation** to continue.

For configuration information, refer to sections under “User-Session Creation” on page 251.

**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 253).

**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 92).

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 376), 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 21.) 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.
Chapter 6
Service Provider SSO Configuration

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.
The PingFederate WS-Trust STS provides security-token validation and creation to extend SSO access to identity-enabled Web Services (see “About WS-Trust STS” on page 6).

The chapter provides instructions for configuring the WS-Trust STS in the administrative console and covers these main topics:

- “Server Settings”
- “IdP Configuration for STS”
- “SP Configuration for STS”

**Server Settings**

To use the PingFederate WS-Trust STS for partner connections, start by enabling the WS-Trust protocol under **Server Settings** on the Roles and Protocols screen (see “Choosing Roles and Protocols” on page 85). Once the protocol is enabled, you must identify the STS server with a unique federation identifier for both SAML 2.0 and SAML 1.1 tokens (unless these IDs are already established for corresponding browser-based SSO protocols).

In addition, also under **Server Settings**, you have the option of requiring authentication globally for access to STS endpoints—(see “Configuring STS Authentication” on page 309).

**Enabling the WS-Trust STS**

You can enable the WS-Trust STS when you first install PingFederate (see “Running PingFederate for the First Time” in the “Installation” chapter of Getting Started). If you have already installed PingFederate or are upgrading to a new version, use the following procedure.

**To enable WS-Trust and make the STS available for partner connections:**

1. On the Main Menu under System Settings, click **Server Settings**.
2. Click **Roles and Protocols** under the Server Settings tab.

3. Select WS-Trust for either the IdP or the SP role, or both, depending on your requirements.

   **Note:** PingFederate fully supports the STS with or without selections of any of the Browser SSO protocols listed above the WS-Trust selections. SAML 1.1 and 2.0 token handling is independent of supported SSO protocols chosen here.

4. Click **Next**.

5. On the Federation Info screen, ensure all required fields are completed.

   **Note:** Identifiers are needed for both SAML 2.0 and SAML 1.x to enable the STS to issue either type of token when requested. If you have not established a federation ID for either of these protocols or do not expect to use one or the other, enter a placeholder (in any format) and return later if needed. (For more information about the fields on this screen, see “Specifying Federation Information” on page 87).

6. (Optional) Click **Next** to go to the WS-Trust STS Settings screen (see the next section, “Configuring STS Authentication”).

7. Click **Save** (on any screen).
Configuring STS Authentication

Server settings may be configured to require that client applications provide credentials to access the PingFederate STS. This is recommended for IdP configurations using the Username Token Processor (available separately).

For other token processors and token generators, trust in the identity of the client is conveyed within the token itself and verified as part of processing. However, administrators may wish to add another layer of security by limiting access to only authenticated clients.

**Note:** When STS authentication is configured, the configuration applies globally for all IdP and SP partner connections configured for STS clients and to all token formats.

To continue, click **Configure WS-Trust STS Authentication**.

Selecting Authentication Methods

You can choose either HTTP Basic or mutual SSL/TLS authentication (or both) on the Authentication Methods screen. (Note that if both methods are configured, all clients must authenticate using both, not one or the other.)

**Important:** If you choose mutual SSL/TLS authentication, you must configure a secondary PingFederate SSL port (see the property `pf.secondary.https.port` in the table under “Changing Configuration Parameters” on page 60).
Chapter 7  
WS-Trust STS Configuration

Configuring Basic Authentication

For HTTP Basic authentication, create username/password pairs (“Users”) for all client applications needing access to the STS.

To add users:

1. Click Create User.
2. On the User Account screen, enter a Username and Password, and confirm the password.
   
   Passwords must be at least six characters long, containing at least one uppercase, one lowercase, and one numeric character.

3. Click Done.
4. Repeat the preceding steps as needed.
5. On the HTTP Basic Authentication screen, click Next.
   
   (If you are also configuring SSL authentication, complete that configuration and click Next to reach the Summary screen (see “Configuring Mutual SSL Authentication” on page 311).)

6. On the Summary screen, click Done.
7. On the WS-Trust STS Settings screen, click Save.

To update an account password:

1. Click the Username.
2. On the User Account screen, enter the Current User Password and a New
   Password, with confirmation.
   
   Passwords must be at least six characters long, containing at least one uppercase,
   one lowercase, and one numeric character.

3. Click Done.

4. On the HTTP Basic Authentication screen, click Done.

5. On the WS-Trust STS Settings screen, click Save.

To delete a user:
1. Click Delete under Action for the Username.

2. Click Done (or Next for new configuration).

3. Click Save when you reach the WS-Trust STS Settings screen.

Configuring Mutual SSL Authentication

When SSL authentication is selected on the Authentication Methods screen, the
configuration begins on the Mutual SSL Authentication screen.

Important: If you choose mutual SSL/TLS authentication, you must
configure a secondary PingFederate SSL port (see the property
pf.secondary.https.port in the table under “Changing
Configuration Parameters” on page 60)

Choosing Certificate Authentication Options

On the Authentication Options screen, select whether to verify client SSL
certificates against a list of Subject Distinguished Names (DNs) or a list of issuer
public certificates imported into PingFederate.

Note: You can choose both options. However, note that they are not
used alternatively at runtime; both validations are applied.
To continue, select one or both methods and click \textbf{Next}.

For information about restricting access by Subject DN, see the next section. For information about restricting access by certificate, see “Managing Allowed Issuer Certificates” on page 313.

\textbf{Managing Allowed Subject DNs}

On the Allowed Subject DNs screen you can add, edit, or delete Subject DNs for clients allowed to access the PingFederate STS.

\textbf{To add DNs:}
1. Enter a valid Subject DN for a partner STS client and click \textbf{Add}.
2. Add other DNs as needed.
3. For a new configuration, click \textbf{Next} or \textbf{Done} to continue.
4. If you are finished with a new or existing configuration, continue clicking \textbf{Done} until you reach the WS-Trust STS Settings screen and then click \textbf{Save}.

\textbf{To edit DNs:}
1. Click \textbf{Edit} under Action for the Subject DN.
2. Make changes and click \textbf{Update}.
3. Click \textbf{Done}.
4. If you are finished with a new or existing configuration, continue clicking \textbf{Done} until you reach the WS-Trust STS Settings screen and then click \textbf{Save}.

\textbf{To delete entries:}
1. Click \textbf{Delete} under Action for the Subject DN.
2. Click Done.

3. If you are finished with a new or existing configuration, continue clicking Done until you reach the WS-Trust STS Settings screen and then click Save.

Managing Allowed Issuer Certificates

When STS access is restricted by issuer certificate, the Allowed Issuer Certificates screen provides a means of maintaining a list of valid certificates.

On this screen you can add or remove certificates.

To add certificates:

1. Select the certificate from the drop-down list and click Add.
   - If the certificate you are looking for is not in the list, click Manage Certificates to import it from your file system.

2. Add other certificates as needed.

3. For a new configuration, click Next or Done to continue.

4. If you are finished with a new or existing configuration, continue clicking Done until you reach the WS-Trust STS Settings screen and then click Save.

To delete a certificate from the list:

1. Click Remove under Action for the Issuer Certificate.

2. Click Done.

3. If you are finished with a new or existing configuration, continue clicking Done until you reach the WS-Trust STS Settings screen and then click Save.

Using the Summary Screen

When you have finished configuring Mutual SSL Authentication, 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.

To save a new or modified configuration, click Done on successive screens until you reach the WS-Trust STS Settings screen and then click Save.

Using the WS-Trust STS Settings Summary Screen

When you have finished configuring WS-Trust STS Settings, 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.
Chapter 7
WS-Trust STS Configuration

- If you are editing an existing connection, click Done and on the WS-Trust STS Settings screen click Save.

IdP Configuration for STS

This section covers the IdP configuration for the PingFederate WS-Trust STS, which involves:

- “Configuring Token Processors”
- “Managing STS Request Parameters” (Optional)
- “Configuring SP Connections for STS”

Configuring Token Processors

Token Processors are used to validate incoming tokens and token requests to the STS (see “Token Processors and Generators” on page 7). Token Processors for SAML 2.0 and SAML 1.1 tokens are included with the PingFederate installation. This section provides guidance on configuring “instances” of either of the SAML Token Processors. You must configure at least one processor in order to set up an STS connection.

Only one instance of any token processor may be configured.

Additional Token Processors may be downloaded from the Ping Identity Web site (www.pingidentity.com/support-and-downloads).

To begin configuring SAML 1.1 or 2.0 Token Processors:

- On the Main Menu, click Token Processors under Application Integration Settings for My IdP Configuration.

If this link is not shown, ensure that the WS-Trust STS is enabled in Server Settings (see “Enabling the WS-Trust STS” on page 307).

<table>
<thead>
<tr>
<th>Configuring My Server</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Token Processor Instances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Token Processors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PingFederate uses token processors to handle incoming security tokens. Here you can manage instances of token processors that SP connections may use to fulfill Attribute Contracts sent to partners.

<table>
<thead>
<tr>
<th>Instance Name</th>
<th>Instance Id</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New Instance...</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To configure a new token-processor instance:

- Click Create New Instance.

To edit an existing instance:

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

   **Note:** This option is available only if the processor instance is not in use for a connection.

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

Selecting a Token Processor Type

The first step in creating a SAML token-processor instance is choosing the processor type.

To define an instance:
1. Enter the **Instance Name** and **Instance Id** on the Type screen.
2. Select **SAML 1.1 Token Processor <version>** or **SAML 2.0 Token Processor <version>** from the drop-down menu.
3. Click **Next**.

Configuring a SAML Token Processor Instance

On the Instance Configuration screen, you may use signing-certificate DN checking to limit the valid signatures and certificates for token requests accepted for this SAML token type. (By default, the STS validates digital signatures using all trusted Certificate Authorities (CAs) imported into PingFederate.)

At minimum on this screen, you must indicate a unique identifier for the PingFederate STS. To be accepted, an incoming SAML token must contain this ID in its `<audience>` element.
Chapter 7
WS-Trust STS Configuration

To configure the token-processor instance for certificate validation:

1. Enter a URI for Audience.

   This is the ID for the STS for either SAML 1.1 or SAML 2.0 tokens, depending on which processor you are configuring (see “Specifying Federation Information” on page 87).

2. (Optional) Click the Add a new... link under Action for either Valid Certificate Issuer DNs or Valid Certificate Subject DNs.

   You can use both lists.

   **Important:** When both types of validation are configured, then the certificate used to validate signatures must match an entry in both lists. If only Subject DNs are listed on this screen, then the certificate Issuer DN is not checked and its Subject DN must match one of the entries in the Subject DNs list. If only Issuer DNs are listed here, then the certificate Subject DN is not checked and its Issuer DN must match one of the entries in the Issuer DNs list. If neither Issuer DNs nor Subject DNs are listed, then all certificates are treated as valid for purposes of verification.

3. (Optional) Enter a Valid DN and click Update.

4. (Optional) Repeat the previous steps as needed to add more DNs.
Extending a Processor Contract

Token processors allow administrators to add to a built-in list of user attributes that the processor returns from an incoming token—an extended processor-attribute contract.

To add an attribute:

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

Setting Attribute Masking

On the Token Attributes screen, you can choose to mask attribute values that PingFederate logs from this processor instance at runtime (see “Attribute Masking” on page 16).

To mask an attribute in log files:

1. Under **Mask Log Values** select the attribute whose value you want to mask.

   If OGNL expressions might be used to map derived values into outgoing tokens and you want those values masked, select the related checkbox under the Attribute list (see “Using Attribute Mapping Expressions” on page 391).

Editing and Saving Processor Instances

From the Summary screen, you can reach processor settings for editing.

To edit the configuration:

1. Click the heading above the information you want to change.
2. Make your changes.

3. Click **Done** on the configuration page and **Save** on the Manage Token Processors screen.

**To save a processor instance:**
1. Click **Done** on the Summary screen.
2. Click **Save** on the Manage Token Processors screen.

### Managing STS Request Parameters

As an option for configuring PingFederate to act as a WS-Trust STS, an administrator can define sets of RST metadata parameters that can be used to map attribute values into issued security tokens. After these request contracts are defined, you can make them available when configuring WS-Trust STS settings for SP-partner connections (see “Selecting a Request Contract” on page 324).

To reach this screen, click **STS Request Parameters** under Application Integration Settings on the Main Menu.

If this link is not present, WS-Trust is not enabled (see “Enabling the WS-Trust STS” on page 307).

To add a new set of request parameters, click **Add New Request Contract**.

To edit an existing contract, click its Contract Name.

### Creating a Request Contract

On the Create Request Contract screen, identify the contract and define parameters that will be available in token requests (as associated with this contract for partner connections—see “Managing STS Request Parameters” on page 318).
Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Name</td>
<td>A descriptive name for the Contract—for example, a Web Service Client or Provider.</td>
</tr>
<tr>
<td>Contract ID</td>
<td>An internal identifier—must be alphanumeric with no spaces.</td>
</tr>
<tr>
<td>Parameters to be provided in the request</td>
<td>A list of request parameters for this Contract (see instructions below).</td>
</tr>
</tbody>
</table>

To add a Parameter:

► Enter the Parameter Name in the text box and click Add.

To modify a Parameter Name:

1. Click Edit under Action for the Parameter Name.
2. Edit the name and click Update.

Note: If you change your mind, be sure to click the Cancel link in the Actions column, not the Cancel button, which discards any other changes you might have made.

To delete a Parameter:

► Click Delete for the Attribute Name.

Configuring SP Connections for STS

You can configure an STS connection to an SP partner either in conjunction with browser-based SSO or independently.
To enable STS for a new connection, or to add the capability to an existing connection:

1. Select the WS-Trust STS option on the Connection Type screen (see “Choosing a Connection Type” on page 144).

   **Note:** Before this option can be selected, the WS-Trust protocol must be enabled in Server Settings (see “Server Settings” on page 307)

2. Select a Default Token Type.

   The Default Token Type, either SAML 1.1 or 2.0, is used when a Web Service client does not specify in the token request what token type the STS should issue.

   **Note:** The Default Token Type does not need to match the Protocol indicated on the screen for SSO (when applicable).

When the option is enabled, the configuration starts on the WS-Trust STS screen.

To continue, click **Configure WS-Trust STS**.

### Configuring Protocol Settings

On the Protocol Settings screen, enter a unique identifier for your partner’s Web Service. This identifier corresponds to the element <AppliesTo> in Requests for Security Tokens (RSTs).
Also on this screen, options are available for adding signature or encryption protection to outgoing SAML tokens:

- For SAML 1.1 and SAML 2.0, you can choose to generate a symmetric key to be used in conjunction with the “Holder of Key” designation for the assertion’s Subject Confirmation Method (for information about HoK assertions, see, for example, “Web Services Security SAML Token Profile” (docs.oasis-open.org/wss/oasis-wss-saml-token-profile-1.0.pdf).

- For SAML 2.0, you can choose to encrypt the assertion.

**Note:** You can make both selections if you expect requests for either type of token. These selections are independent of the Default Token Type selected previously (see “Configuring SP Connections for STS” on page 319).

When you make either (or both) of these selections, you will be asked to choose a signing or XML encryption certificate later in the connection setup, unless required certificates are already in place for an existing browser-based SSO connection. (PingFederate uses the same certificates to handle signing/encryption requirements for both Browser SSO and WS-Trust STS—for more information, see “Configuring Credentials” on page 191.)

**Setting a Token Lifetime**

Standards require a window of time during which a security token is considered valid. Each token has a time-stamp XML element as well as elements indicating the allowable lifetime of the token (in minutes) before and after the token time stamp.
WS-Trust STS Configuration

Chapter 7

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 token was issued during which it is to be considered valid.</td>
</tr>
<tr>
<td>Minutes After</td>
<td>The amount of time after the token 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.

Configuring Token Creation

For the PingFederate STS to issue a security token in response to requests for partner services, you must indicate what user attributes are to be included in the token (the "attribute contract"). The attribute values sent in the token are then derived by mapping those available from the Token Processor you select (see “Attribute Contract Fulfillment” on page 335). As with Browser SSO, the mapping can be augmented using local data stores, variable or constant text, or expressions.

Details of this configuration are handled under the Token Creation task.

To continue, click Configure Token Creation.
Defining an Attribute Contract

An attribute contract is the set of user attributes that a Web Service Client at your site expects to receive in security tokens issued for this connection (see “Attribute Contracts” on page 13). You identify these attributes on this screen.

To reach this screen for editing:
1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation
6. Click Attribute Contract on the Summary screen.

To add an attribute:
1. Enter the attribute name in the text box.
   Attribute names are case-sensitive and must correspond to the attribute names (including claims) expected by the requesting WSC.

Tip: You can add a special attribute, SAML_AUTHN_CTX, to indicate to the SP (if required) the type of credentials used to authenticate to the IdP application (see “Authentication Context” in the “Supported Standards” chapter of Getting Started). Map a value for the authentication context on the attribute-mapping screen later in the configuration, from any available attribute source, including the RST if a requested context is specified as a request parameter (see “Attribute Contract Fulfillment” on page 335).
Chapter 7
WS-Trust STS Configuration

2. (Optional) For SAML 1.1 tokens, select the Attribute Namespace.
   This field appears only when SAML 1.1 is chosen as the Default Token Type on
   the Connection Type screen (see “Configuring SP Connections for STS” on
   page 319).
   Change the default Namespace selection if you and your SP partner have agreed
   to a specific namespace (see “STS Namespaces” on page 14).

   **Tip:** The Format attribute associated with the NameID element in outgoing SAML tokens may be set when needed by adding an attribute called \texttt{SAML\_NAME\_FORMAT}. The value of that attribute can then be mapped later (see “Attribute Contract Fulfillment” on page 335).

   For information about the NameID elements and applicable URI values, locate the SAML 2.0 specification at [oasis-open.org/specs](http://oasis-open.org/specs).

3. Click **Add**.

   **To modify an attribute name or namespace:**
   1. Click **Edit** under Action for the attribute.
   2. Make the change and click **Update**.

   **To delete an attribute:**
   ▶ Click **Delete** under Action for the attribute.

**Selecting a Request Contract**

This optional setting allows you to use XML parameters contained in RSTs for token attribute mapping (see “Managing STS Request Parameters” on page 318).

<table>
<thead>
<tr>
<th>SAML2</th>
<th>SP Connection</th>
<th>WS-Trust STS</th>
<th>Token Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help</td>
<td>Support</td>
<td>About</td>
<td>Logout (Administrator)</td>
</tr>
</tbody>
</table>

- **Note:** If needed, an administrator can add additional namespace alternatives via the \texttt{custom-name-formats.xml} configuration file located in the directory:
  <pf_install>/pingfederate/server/default/data/config-store

  To add a new namespace, follow the same syntax used for other drop-down choices for the map name \texttt{sts-attribute-namespaces}.

- If you are not using request parameters, click **Next** to continue.
To use request parameters, select the checkbox and choose a Request Contract from the drop-down list.

If the contract you want is not shown, click Manage STS Request Parameters.

When you choose a contract, you will enable an option to select Request from the drop-down Source list on the attribute-mapping screen (see “Attribute Contract Fulfillment” on page 335).

IdP Token Processor Mapping

IdP token processors are responsible for validating incoming security tokens as part of an STS operation (see “Token Processors and Generators” on page 7). A configured and deployed token processor in PingFederate is known as a token processor instance. The same instance may be mapped by multiple connections.

Map one or more IdP token processor instances into each SP connection to handle all the token types that may be received from Web Service Clients associated with this SP partner.

You begin this configuration on the IdP Token Processor Mapping screen, where you choose to map instances of IdP token processors. If you have not yet configured an instance of the token processor you intend to use within this SP connection, see “Configuring Token Processors” on page 314.

To reach this screen for editing:

1. Click the connection name on the Main Menu.
2. Click Manage All SP, if needed, to see a full list of connections.
3. Click WS-Trust STS under the SP Connection tab.
4. Click Configure WS-Trust STS.
5. Click Token Creation under the WS-Trust STS tab.
6. Click Configure Token Creation
7. Click IdP Token Processor Mapping on the Summary screen.

To modify an existing Token Processor Instance:

1. Click its Name link.

To begin configuring an Token Processor Instance for this connection:

1. Click Map New Token Processor Instance.
Chapter 7
WS-Trust STS Configuration

Selecting a Token Processor Instance

On this screen for a new connection, choose an instance of the Token Processor needed for this connection (see “Token Processors and Generators” on page 7).

You will use attributes returned from the token processor (the token-processor contract) to fulfill the attribute contract required for 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 “Retrieving Attributes” on page 345).

Choose a Token Processor Instance from the drop-down list and click Next to continue.

To create or change a processor instance, as needed, click Manage Token Processor Instances.

To reach this screen for editing:
1. Click the connection name on the Main Menu. Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation.
6. Click IdP Token Processor Mapping on the Summary screen.
7. Click the Token Processor Instance Name.

Retrieving Attributes

For token creation, you can query local user data stores to help fulfill the attribute contract, in conjunction with attribute values supplied by the token processor you are using with PingFederate (see “Configuring Token Processors” on page 314).

The values supplied by the token processor are shown under Token Processor Contract on the Attribute Retrieval screen.
To reach this screen for editing:

1. Click the connection name on the Main Menu. Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation.
6. Click IdP Token Processor Mapping on the Summary screen.
7. Click the Token Processor Instance Name.
8. Click Attribute Retrieval on the Summary screen.

Tip: To determine whether you need to look up additional values, compare the token-processor contract against the attribute contract (see “Defining an Attribute Contract” on page 323). If the attribute contract requires more information, determine whether a local data store can supply it. (You can also choose to use text constants or expressions for certain information—see “Attribute Contract Fulfillment” on page 335.)

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 “Defining an Attribute Contract” on page 323). 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 a data store.
To reach this screen for editing:

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

2. Click WS-Trust STS under the SP Connection tab.

3. Click Configure WS-Trust STS.

4. Click Token Creation under the WS-Trust STS tab.

5. Click Configure Token Creation.

6. Click IdP Token Processor Mapping on the Summary screen.

7. Click the Token Processor Instance Name.

8. Click Attribute Source & User Lookup under the IdP Token Processor Mapping tab.

   If this step is not listed, then this instance is configured to use token-processor values only (see “Retrieving Attributes” on page 326).

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 it (see “Managing Data Stores” on page 93).

Attribute Source Setup

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 329  
|                 | - “Configuring a Database Filter (WHERE Clause)” on page 330 |
| LDAP            | - “Configuring an LDAP Directory Search” on page 332  
|                 | - “Configuring an LDAP Filter” on page 333 |
| Custom          | - “Configuring Custom Source Filters” on page 335  
|                 | - “Selecting Custom Source Fields” on page 335 |
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 a security token to this SP (see “Defining an Attribute Contract” on page 323). 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 for editing:

1. Click the connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation
6. Click **IdP Token Processor Mapping** on the Summary screen.

7. Click the Token Processor Instance Name.

8. Click **Database Table and Columns** under the IdP Token Processor Mapping tab.

**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 Attribute.

**Tip:** Click **Refresh** if you are updating an existing configuration and changes may have been made to the database.

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 filter (see “Configuring a Database Filter (WHERE Clause)” next). Add only attributes from which you need actual values to pass in a token.

**Tip:** To determine what attributes to look up during a query, click the **View Attribute Contract** link to see what information must be collected (see “Defining an Attribute Contract” on page 323). Then determine what information is coming in from the token processor (see “Retrieving Attributes” on page 326). Information not contained in the token-processor contract may be pulled from the data store look-up query.

**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 incoming security token. 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 329).

The right side generally uses values passed in from a token processor (variables, including the correct formatting, are listed under Token Processor Values—see “Configuring Token Processors” on page 314).

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

**Tip:** Click “**View List of 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 token processor.

**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 for editing:
1. Click the connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation
6. Click IdP Token Processor Mapping on the Summary screen.
7. Click the Token Processor Instance Name.
8. Click Database Filter under the IdP Token Processor Mapping tab.
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 security token (see “Attribute Contract Fulfillment” on page 335).

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.</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 for editing:
1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation
6. Click IdP Token Processor Mapping on the Summary screen.
7. Click the Token Processor Instance Name.
8. Click LDAP Directory Search under the IdP Token Processor Mapping tab.

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 into the outgoing security token.

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 incoming token. The filter is in the form:

```
attribute=$\{value\}
```

The left-side variable is an attribute you selected earlier (see “Configuring an LDAP Directory Search” on page 332).

The right side generally uses values passed in from the security token (variables, including the correct syntax, are listed under Security Token Values—see “Configuring Token Processors” on page 314).

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 for editing:
1. Click the connection name on the Main Menu.
   - Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation.
6. Click IdP Token Processor Mapping on the Summary screen.
7. Click the Token Processor Instance Name.
8. Click LDAP Filter under the IdP Token Processor Mapping tab.
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 99).

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 attribute 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
You map attributes for outgoing security tokens for this partner on the Attribute Contract Fulfillment screen.

<table>
<thead>
<tr>
<th>Attribute Contract</th>
<th>Source</th>
<th>Value</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAML_SUBJECT</td>
<td>LDAP</td>
<td>SubjectDN</td>
<td>None available</td>
</tr>
</tbody>
</table>

Map each attribute to fulfill the Attribute Contract from one of these Sources:
- **Token**
  When you make this selection, the associated Value drop-down list is populated by the token processor.
- **LDAP/JDBC/Custom**
  Values are returned from your attribute source (if you are using data store—see “Retrieving Attributes” on page 326). When you make this selection, the Value list is populated by the LDAP, JDBC or Custom attributes you identified as an Attribute Source (see “Configuring an LDAP Directory Search” on page 332,
Chapter 7
WS-Trust STS Configuration

“Selecting a JDBC Database Table and Columns” on page 329, or “Configuring Custom Source Filters” on page 335).

- **Request**
  Values are supplied from parameters in the token request received from the Web Service Client. This selection is available only if a Request Contract was selected earlier (see “Selecting a Request Contract” on page 324).

- **Expression** (when enabled)
  This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.

- **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 incoming token, 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.

**To reach this screen for editing:**
1. Click the connection name on the Main Menu.
   Click Manage All SP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the SP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Creation under the WS-Trust STS tab.
5. Click Configure Token Creation
6. Click IdP Token Processor Mapping on the Summary screen.
7. Click the Token Processor Instance Name.
8. Click Attribute Contract Fulfillment under the IdP Token Processor Mapping tab.

**To map attributes:**
1. Choose a Source for each Target attribute.
2. Choose (or enter) a Value for each Attribute.
   See “Map each attribute to fulfill the Attribute Contract from one of these Sources:” on page 335. All values must be mapped.
3. Click Next.

**Using the Mapping Summary Screen**

When you have finished configuring IdP Token Processor Mapping, 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.

- If you are editing an existing connection, click Done on successive screens until you reach the WS-Trust STS screen, and then click Save.

**To save a new configuration:**
1. Click Done to return to the IdP Token Processor Mapping screen.
2. Click **Next** to go to the Token Creation Summary screen, and then click **Done**.

3. On the Token Creation screen, click **Done**.

4. On the WS-Trust STS screen, click **Save**.

**Request Error Handling**

If you are using request parameters to fulfill the attribute contract and the parameter values are not supplied, you can choose whether to continue or abort the token-creation process.

Using the **Token Configuration Summary Screen**

When you have finished configuring Token Creation, 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.

- If you are editing an existing connection, click **Done** on successive screens until you reach the WS-Trust STS screen, and then click **Save**.

On the WS-Trust STS Summary screen, you can review the configuration for this connection.

- If you need to make any changes to a new or existing connection, click the heading over the information you want to modify.
Chapter 7
WS-Trust STS Configuration

SP Configuration for STS

This section covers the SP configuration for STS, which involves:
- “Configuring Token Generators”
- “Configuring IdP Connections for STS”

Configuring Token Generators

Token Generators are used to issue security tokens that can be consumed by Web Services at your site (see “Token Processors and Generators” on page 7). Token Generators for SAML 2.0 and SAML 1.1 tokens are included with the PingFederate installation. This section provides guidance on configuring “instances” of either of the SAML Token Generators. You must configure at least one generator in order to set up an STS connection.

Only one instance of any Token Generator may be configured.

Additional Token Generators are available from the Ping Identity Web site (at www.pingidentity.com/products/PingFederate-Token-Translators.cfm).

To begin configuring SAML 1.1 or 2.0 Token Generators:
- On the Main Menu, click Token Generators under Application Integration Settings for My SP Configuration.

If this link is not shown, ensure that the WS-Trust STS is enabled in Server Settings (see “Enabling the WS-Trust STS” on page 307).

<table>
<thead>
<tr>
<th>Configure My Server</th>
<th>Help</th>
<th>Support</th>
<th>About</th>
<th>Logout (Administrator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Main] Manage Token Generator Instances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Manage Token Generators

PingFederate uses token generators to issue tokens that can be used by Web Services at your site to authenticate service requests. Create “instances” of token generators here to use within IdP connections for mapping attributes from incoming SAML tokens to attributes required by local applications.

<table>
<thead>
<tr>
<th>Instance Name</th>
<th>Instance Id</th>
<th>Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New Instance...</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To configure a new token-generator instance:
- Click Create New Instance

To edit an existing instance:
- Click the Instance Name and click the step you need to change.

To delete an instance:
1. Click Delete next to the Instance Name. (To undo the deletion, click Undelete.)
2. Click Save to confirm the deletion.

Note: This option is available only if the generator instance is not in use for a connection.
Selecting a Token Generator Type

The first step in creating a SAML token-generator instance is choosing the generator type.

To define an instance:
1. Enter the Instance Name and Instance Id on the Type screen.
2. Select SAML 1.1 Token Generator <version> or SAML 2.0 Token Generator <version> from the drop-down menu.
3. Click Next.

Configuring a Token Generator Instance

On the Instance Configuration screen, you specify parameters for generated SAML tokens.
Chapter 7
WS-Trust STS Configuration

To configure the token-generator instance:

- Provide information for all required fields—refer to screen Descriptions for information about each field.

If you have not yet imported a Signing Certificate, click **Manage Signing Certificates**.

The Audience entry is used for the `<audience>` element of the generated SAML token.

**Extending a Generator Contract**

Token generators allow administrators to add to a built-in list of user attributes that the generator includes in the outgoing token—an extended generator-attribute contract.
To add an attribute:

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

**Editing and Saving Generator Instances**

From the Summary screen, you can reach token-generator settings for editing.

**To edit the configuration:**

1. Click the heading above the information you want to change.
2. Make your changes.
3. Click **Done** on the configuration page and **Save** on the Manage Token Generators screen.

**To save a generator instance:**

1. Click **Done** on the Summary screen.
2. Click **Save** on the Manage Token Generators screen.

**Configuring IdP Connections for STS**

You can configure an STS connection to an IdP partner either in conjunction with browser-based SSO or independently.

**To enable STS for a new connection, or to add the capability to an existing connection:**

- Select the WS-Trust STS option on the Connection Type screen (see “Choosing a Connection Type” on page 242).

**Note:** Before this option can be selected, the WS-Trust protocol must be enabled in Server Settings (see “Server Settings” on page 307)

When the option is enabled, the configuration starts on the WS-Trust STS screen.
To continue, click **Configure WS-Trust STS**.

### Configuring Protocol Settings

On the Protocol Settings screen, choose whether to validate incoming SAML tokens or to validate and then also generate different tokens to enable SSO access to Web Services at your site.

Also on this screen, if incoming SAML 2.0 tokens for this connection are required to be encrypted, select the checkbox for decrypting assertions. When you make this selection, you will be required to choose a decryption certificate for this partner later in the connection configuration (if one is not already selected for Browser SSO purposes—see “Selecting a Decryption Key” on page 301).

If you choose not to generate new tokens, then no further settings are needed for this task—click **Next** and refer to “Using the Token Generation Summary Screen” on page 356 for instructions on saving this configuration.

You will be asked later to choose a certificate with which to verify the signature on the incoming SAML token (see “Configuring Signature Verification Settings” on page 195).

### Configuring Token Generation

For the PingFederate STS to issue a security token that meets identity requirements of Web Services at your site, you must indicate what user attributes are included in the incoming token (the “attribute contract”). The attribute values from the incoming token can be then mapped to attributes in the token generator you select (see “Attribute Contract Fulfillment” on page 354). As with Browser SSO, the
mapping can be augmented using local data stores, variable or constant text, or expressions.

Details of this configuration are handled under the Token Generation task.

To continue, click **Configure Token Creation**.

### Defining an Attribute Contract

An attribute contract is the set of user attributes expected in incoming security tokens (see “Attribute Contracts” on page 13). You identify these attributes on this screen.

To reach this screen for editing:

1. Click the connection name on the Main Menu.
2. Click **Configure IdP** if needed, to see a full list of connections.
3. Click **WS-Trust STS** under the IdP Connection tab.
4. Click **Configure WS-Trust STS**.
5. Click **Token Generation** under the WS-Trust STS tab.
   - If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
6. Click **Configure Token Generation**.
6. Click **Attribute Contract** on the Summary screen.

**To add an attribute:**

1. Enter the attribute name in the text box.
   - Attribute names are case-sensitive and must correspond to the attribute names expected by the requester.
2. (Optional) Select the checkbox under Mask Values in Log.
3. Click **Add**.

**To modify an attribute name:**

1. Click **Edit** under Action for the attribute.
2. Make the change and click **Update**.

**To delete an attribute:**

- Click **Delete** under Action for the attribute.

### Mapping Token Generators

Token generators provide a mechanism through which PingFederate can generate a local token based upon an incoming SAML token, including mapping user attributes to be included in the generated token. A configured and deployed token generator in PingFederate is known as a token-generator instance.

You can map one or more token generator instances into each IdP connection to satisfy multiple session-management requirements where needed. The same instances may be mapped by multiple connections.

The configuration begins on the Token Generator Mapping & User Lookup screen. If you have not yet configured an instance of a token generator you need for this connection, see “Configuring Token Generators” on page 338.

---

**To reach this screen for editing:**

1. Click the connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **WS-Trust STS** under the IdP Connection tab.
3. Click **Configure WS-Trust STS**.
4. Click **Token Generation** under the WS-Trust STS tab.
   - If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click **Configure Token Generation**
6. Click **Token Generator Mapping & User Lookup** on the Summary screen.

**To modify an existing Token Generator Instance:**
- Click its Name link.

**To begin configuring an Token Generator Instance for this connection:**
- Click **Map New Token Generator Instance**.

**Selecting a Token Generator Instance**

On this screen for a new connection, choose an instance of the Token Generator needed for this connection (see “Token Processors and Generators” on page 7).

You will use attributes contained in the incoming security token to fulfill the token generator contract for this STS connection and/or use them to look up additional attributes in a user data store. You make this choice on the next screen (see “Retrieving Attributes” on page 326).

- Choose a **Token Generator Instance** from the drop-down list and click **Next** to continue.
  - To create or change a Token Generator Instance, as needed, click **Manage Token Generator Instances**.

**Retrieving Attributes**

For token generation, you can query local user data stores to help fulfill the token-generator contract, in conjunction with attribute values supplied by the incoming token.

The values supplied by the token are shown under Attribute Contract on the Attribute Retrieval screen.
To reach this screen for editing:
1. Click the connection name on the Main Menu.
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the IdP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Generation under the WS-Trust STS tab.
   If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click Configure Token Generation
6. Click Token Generator Mapping & User Lookup on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click Attribute Retrieval on the Summary screen.
   ▶ If you choose to look up additional information, then you will identify a data store and specify lookup queries next (see the next section “Choosing a Data Store” on page 346).
   ▶ If you use only the attributes available (the default), then you will map values for the attribute contract next (see “Attribute Contract Fulfillment” on page 354).

Tip: To determine whether you need to look up additional values, compare the attribute contract against the token-generator contract on the previous screen (see “Selecting a Token Generator Instance” on page 345). If the token-generator 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 “Attribute Contract Fulfillment” on page 354.)

Choosing a Data Store

This portion of the connection configuration allows you to set up search parameters for a data store.
To reach this screen for editing:

1. Click the connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the IdP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Generation under the WS-Trust STS tab.
   - If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click Configure Token Generation
6. Click Token Generator Mapping & User Lookup on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click Data Store under the Token Generator Mapping & User Lookup tab.
   - If this step is not presented, this Token Generator Instance is not configured to look up user attributes in a data store (see “Retrieving Attributes” on page 345).

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 it (see “Managing Data Stores” on page 93).

Attribute Source Setup

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>
<tbody>
<tr>
<td>JDBC</td>
<td>“Selecting a JDBC Database Table and Columns” on page 348&lt;br&gt;“Configuring a Database Filter (WHERE Clause)” on page 349</td>
</tr>
<tr>
<td>LDAP</td>
<td>“Configuring an LDAP Directory Search” on page 351&lt;br&gt;“Configuring an LDAP Filter” on page 352</td>
</tr>
<tr>
<td>Custom</td>
<td>“Configuring Custom Source Filters” on page 354&lt;br&gt;“Selecting Custom Source Fields” on page 354</td>
</tr>
</tbody>
</table>
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 token-generator contract (see “Retrieving Attributes” on page 345). 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 for editing:

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

2. Click WS-Trust STS under the IdP Connection tab.

3. Click Configure WS-Trust STS.

4. Click Token Generation under the WS-Trust STS tab.
   
   If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).

5. Click Configure Token Generation

6. Click Token Generator Mapping & User Lookup on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click **Database Table and Columns** under the Token Generator Mapping & User Lookup tab.

**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 Attribute.

**Tip:** Click **Refresh** if you are updating an existing configuration and changes may have been made to the database.

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 filter (see “Configuring a Database Filter (WHERE Clause)” next). Add only attributes from which you need actual values to pass in a token.

**Tip:** To determine what attributes to look up during a query, click the **View Attribute Contract** link to see what information must be collected (see “Defining an Attribute Contract” on page 343). Then determine what information is coming in from the token processor (see “Retrieving Attributes” on page 345). Information not contained in the token-processor contract may be pulled from the data store look-up query.

### 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 incoming security token. 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 348).

The right side generally uses values passed in from the incoming SAML token (variables, including the correct formatting, 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 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 token processor.

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

To reach this screen for editing:

1. Click the connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click **WS-Trust STS** under the IdP Connection tab.
3. Click **Configure WS-Trust STS**.
4. Click **Token Generation** under the WS-Trust STS tab.
   - If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click **Configure Token Generation**
6. Click **Token Generator Mapping & User Lookup** on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click **Database Filter** from the steps list under the Token Generator Mapping & User Lookup tab.
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 security token (see “Attribute Contract Fulfillment” on page 354).

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 for editing:
1. Click the connection name on the Main Menu.
   - Click Manage All IdP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the IdP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Generation under the WS-Trust STS tab.
   - If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click Configure Token Generation
6. Click Token Generator Mapping & User Lookup on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click LDAP Directory Search under the Token Generator Mapping & User Lookup tab.

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 into the outgoing security token.

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 incoming token. 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 351).

The right side generally uses values passed in from the incoming SAML token (variables, including the correct syntax, are listed under Assertion Values).

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 for editing:

1. Click the connection name on the Main Menu.
   - Click **Manage All IdP**, if needed, to see a full list of connections.
2. Click **WS-Trust STS** under the IdP Connection tab.
3. Click **Configure WS-Trust STS**.
4. Click **Token Generation** under the WS-Trust STS tab.
   - If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click **Configure Token Generation**
6. Click **Token Generator Mapping & User Lookup** on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click **LDAP Filter** under the Token Generator Mapping & User Lookup tab.
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 99).

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 token processor 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

You map attributes for outgoing security tokens for this partner on the Token Generator Contract Fulfillment screen.

Map each attribute to fulfill the Token Generator Contract from one of these Sources:

- **Assertion**
  When you make this selection, the associated Value drop-down list is populated by the incoming SAML token ("Assertion").

- **LDAP/JDBC/Custom**
  Values are returned from the selected data store (see “Retrieving Attributes” on page 345). When you make this selection, the Value list is populated by the LDAP, JDBC or Custom attributes specified in previous screens (see “Configuring an LDAP Directory Search” on page 351, “Selecting a JDBC Database Table and Columns” on page 348, or “Configuring Custom Source Filters” on page 354).
Expression (when enabled)

This option provides more complex mapping capabilities—for example, transforming incoming values into different formats (see “Using Attribute Mapping Expressions” on page 391). All of the variables available for text entries (see below) are also available for expressions.

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 incoming token, 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.

To reach this screen for editing:

1. Click the connection name on the Main Menu.
   
   Click Manage All IdP, if needed, to see a full list of connections.
2. Click WS-Trust STS under the IdP Connection tab.
3. Click Configure WS-Trust STS.
4. Click Token Generation under the WS-Trust STS tab.
   
   If this step is not shown, token generation is not selected for the connection (see “Configuring Protocol Settings” on page 342).
5. Click Configure Token Generation
6. Click Token Generator Mapping & User Lookup on the Summary screen.
7. Click the Token Generator Instance Name.
8. Click Token Generator Contract Fulfillment under the Token Generator Mapping & User Lookup tab.

To map attributes:

1. Choose a Source for each Target attribute.
2. Choose (or enter) a Value for each Attribute.
   
   See “Map each attribute to fulfill the Token Generator Contract from one of these Sources:” on page 354. All values must be mapped.
3. Click Next.

Using the Mapping Summary Screen

When you have finished configuring Token Generator Mapping & 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.

▶ If you are editing an existing connection, click Done on successive screens until you reach the WS-Trust STS screen, and then click Save.

To save a new configuration:

1. Click Done to return to the Token Generator Mapping & User Lookup screen.
2. Click Next to go to the Token Generation Summary screen, and then click Done.
3. On the Token Generation screen, click Done.
4. On the WS-Trust STS screen, click Save.
Using the Token Generation Summary Screen

When you have finished configuring Token Generation, 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.

- If you are editing an existing connection, click Done on successive screens until you reach the WS-Trust STS screen, and then click Save.
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 “SSO Integration Kits and Adapters” on page 9).

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 Instance Name and Instance Id, select OpenToken Adapter 2.3 (or higher) as the Type, and click Next.

The Instance Id may not contain spaces or underscores.

```
| Instance Name: OpenToken |
| Instance Id: OTK        |
| Type: OpenToken Adapter 2.3 |
```

4. On the IdP Adapter screen, enter the values as described for the adapter configuration.

These values are dependent on your developer’s implementation.

```
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td></td>
<td>Password to use for generating the encryption key.</td>
</tr>
<tr>
<td>Confirm Password</td>
<td></td>
<td>Must match password field.</td>
</tr>
<tr>
<td>Authentication Service</td>
<td></td>
<td>The URL to which the user is redirected for an SSO event. This URL is part of an external application, which performs user authentication.</td>
</tr>
</tbody>
</table>
```

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 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 Contract screen, you can configure additional attributes for the adapter (see “Extending an Adapter Contract” on page 133).

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).
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 16).

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.

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 Instance Name and Instance Id, select OpenToken Adapter 2.3 (or higher) as the Type, and click Next.

   The Instance Id may not contain spaces or underscores.

4. Enter values for the adapter configuration on the Instance Configuration screen.

   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 descriptions for more information.

6. Click **Next**.

7. On the 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 Contract screen, you can configure additional attributes for the adapter (see “Extending an Adapter Contract” on page 133).

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 Adapter Instances” on page 230).
Appendix A

OpenToken Adapter Configuration
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 “SSO Integration Kits and Adapters” on page 9).

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 10). 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 357).

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 99).
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 Instance Name and Instance Id, select LDAP Authentication Service 2.1 as the Type, and click Next. The Instance Id may not contain spaces or underscores.

```
| Instance Name | Idap |
| Instance Id   | Idap |
| Type          | LDAP Authentication Service 2.1 |
```

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 130). Click Manage Data Stores if you have not established a connection to your LDAP server.
## LDAP Adapter Configuration

**Property Description**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LDAP Datastore</strong></td>
<td>The LDAP Data store configured in PingFederate.</td>
</tr>
<tr>
<td><strong>Search Base</strong></td>
<td>The location in the LDAP directory server from which the search begins.</td>
</tr>
<tr>
<td><strong>Search Filter</strong></td>
<td>Query used to produce the desired set of matching records.</td>
</tr>
<tr>
<td><strong>Realm</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
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>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>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>
<tr>
<td>Logout Path</td>
<td>Any path in the format indicated. Setting a path will invoke adapter logout functionality that is normally invoked during SAML 2.0 single-login processing. Available primarily for partner SaaS providers who do not support SAML Single Log-out (SLO) but who may want users' IdP SSO sessions to end after logging out of the SaaS services.</td>
</tr>
<tr>
<td>Logout Redirect</td>
<td>The landing page at the SP after successful IdP logout (applicable only when Logout Path is set above).</td>
</tr>
<tr>
<td>Logout Template</td>
<td>Template on the IdP server to display after successful IdP logout (applicable only when Logout Path is set above).</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).

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Pseudonym</th>
<th>Mask Log Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>subject</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This selection is used if any of your SP partners will make use of **pseudonyms** for account linking (see “Account Linking” on page 10).

**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 16).

If OGNL expressions might be used to map derived values into outgoing assertions and you want those values masked, select the related checkbox under the Attribute list (see “Using Attribute Mapping Expressions” on page 391).

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 99).

2. Click **SP Adapters** on the Main Menu.

3. On the Manage Adapter Instances screen, click **Create New Adapter Instance**.
4. On the Type screen, enter an Instance Name and Instance Id, select LDAP Authentication Service 2.1 as the Adapter Type, and click Next. The Instance Id may not contain spaces or underscores.

5. On the Instance Configuration 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 226). 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 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 Contract screen, configure additional attributes as needed for this adapter instance (see “Extending an Adapter Contract” on page 229).

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 Adapter Instances” on page 230).

   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.
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://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 72).

For either SP or IdP servers, a maintenance endpoint is also provided for administrators to verify that the server is running (see “System-Services Endpoints” on page 381).

**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. Any other parameters that contain restricted characters (many SAML URNs, for example) also must be URL-encoded.

For information about URL encoding, see, for example, “HTML URL-encoding Reference” (www.w3schools.com/tags/ref_urlencode.asp).
/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 383.

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 135).</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 72).</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>
<tr>
<td>ACSIdx (optional - SAML 2.0)</td>
<td>Specifies the index number of partner’s ACS (see “Setting Assertion Consumer Service URLs (SAML)” on page 178). 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>
</tbody>
</table>
IdP Endpoints

/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>IdpAdapterId (optional)</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 (optional - SAML 2.0)</td>
<td>Allows control over the NameId format.</td>
</tr>
</tbody>
</table>

/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.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 IdP Default URL screen.</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 72).</td>
</tr>
<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:</td>
</tr>
<tr>
<td></td>
<td>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Artifact</td>
</tr>
<tr>
<td></td>
<td>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST</td>
</tr>
<tr>
<td></td>
<td>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect</td>
</tr>
<tr>
<td></td>
<td>urn:oasis:names:tc:SAML:2.0:bindings:HTTP-SOAP</td>
</tr>
<tr>
<td></td>
<td>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 181).</td>
</tr>
</tbody>
</table>
The following table shows the one HTTP query parameter 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 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.</td>
</tr>
</tbody>
</table>

**System-Service Endpoints**

See “System-Services Endpoints” on page 381.

**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 383.

The following table shows the HTTP parameters for this endpoint.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnerIdpId (required if more than one IdP connection is configured and Domain is not used)</td>
<td>The federation ID of the IdP that will authenticate the user and issue an assertion.</td>
</tr>
<tr>
<td>Domain (required to invoke Auto-Connect)</td>
<td>The domain name associated with the requesting user’s IdP (see “Using Auto-Connect” on page 21). In this case, PartnerIdpId cannot be used.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>TargetResource or TARGET</td>
<td>This parameter indicates where the end-user is redirected after a successful SSO. Note: 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 232).</td>
</tr>
</tbody>
</table>
| Binding (optional)        | Indicates the binding to be used; allowed values are URLs defined in the SAML specifications. For example, the SAML 2.0 applicable URLs 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  
|                           | When the parameter is not used for SAML 2.0, the first SSO Service URL configured for the IdP-partner connection is used (see “Specifying SSO Service URLs (SAML)” on page 268). |
| InErrorResource (optional) | This parameter indicates where the end-user is redirected after an unsuccessful SSO. 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 72). |
| SpSessionAuthn AdapterId (optional) | The explicit SP adapter instance ID indicating the adapter to use to create an authenticated session or security context. |
| ForceAuthn (optional - SAML 2.0) | This parameter controls the attribute of the same name in the AuthnRequest. (The default is false.) |
| IsPassive (optional - SAML 2.0) | This parameter controls the attribute of the same name in the AuthnRequest. (The default is false.) |
| AllowCreate (optional - SAML 2.0) | Controls the value of the AllowCreate attribute of the NameIDPolicy element in the AuthnRequest. (The default is true.) |
| RequestedFormat (optional - SAML 2.0) | Specifies the value for the Format attribute in the NameIDPolicy element of the AuthnRequest. If not specified, the attribute is not included in the AuthnRequest. |
| RequestedACSIdx (optional - SAML 2.0) | The index number of your site’s Assertion Consumer Service, where you want the assertion be sent to be sent. |
Appendix C
Application Endpoints

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 Adapter Instances” on page 230).

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>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.

/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 SF 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 376). 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>Note: When specified this parameter overrides the Subject parameter.</td>
<td></td>
</tr>
<tr>
<td>PartnerIdpId (except for XASP)</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>
<tr>
<td>Note: For XASP, this parameter overrides both the Subject and Issuer parameters.</td>
<td></td>
</tr>
</tbody>
</table>
System-Services Endpoints

These endpoints apply to the PingFederate server generally, whether used as an IdP, SP, or both.

/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 80).

/pf/adapter2adapter.ping

This endpoint initiates direct IdP-to-SP adapter mapping, when that feature is configured (see “IdP-to-SP Adapter Mapping” on page 107).

---

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Format (required for XASP, otherwise optional) | Identifies the name-identifier format of the Subject query parameter. If included, the value must be one of the SAML 2.0 Name Identifier Format URIs (see section 8.3 of the SAML specifications (http://docs.oasis-open.org/security/saml/v2.0/saml-core-2.0-os.pdf).

**Note:** For XASP, this parameter must be set to:

`urn:oasis:names:tc:SAML:1.1:nameid-format:X509SubjectName`

If not specified, the parameter defaults to:


**Note:** The parameter must be URL-encoded. |
| AppId | The unique identifier of the initiating application. |
| SharedSecret | Used to authenticate the initiating application. The AppId and SharedSecret must both match the application authentication settings within the PingFederate server. |
| RequestedAttrName (optional) | A name of a user attribute requested from the IdP. For each such desired user attribute, include this parameter. If this parameter is not present, then all allowable user attributes are returned from the IdP. |
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 (optional)</td>
<td>Indicates where the user is redirected after a successful SSO. If this parameter is not included in the request, PingFederate uses as a default the URL for a successful SSO (see “Configuring Default URLs” on page 232).</td>
</tr>
<tr>
<td>SpSessionAuthnAdapterId (optional)</td>
<td>The SP adapter instance ID to be used. If not provided and more than one SP adapter instance is configured with adapter-to-adapter mapping, PingFederate uses configured defaults (see “Mapping URLs to Adapter Instances” on page 230).</td>
</tr>
<tr>
<td>IdpAdapterId (optional)</td>
<td>Indicates the IdP adapter to use for authentication if more than one IdP adapter is configured in adapter-to-adapter mappings.</td>
</tr>
<tr>
<td>InErrorResource (optional)</td>
<td>Indicates where the user is redirected if the SSO is unsuccessful. 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 72).</td>
</tr>
</tbody>
</table>

/pf/ws-trust_sts_metadata.ping

This endpoint returns STS metadata for use in expediting configuration of Web-service applications.

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</td>
<td>The Connection ID of the SP to whom the SAML token will be issued. This parameter determines the connection for which metadata will be generated.</td>
</tr>
<tr>
<td>Type (optional)</td>
<td>Determines the type of metadata to generate. Possible values include mex and fed. The default is fed (see “Windows Identity Foundation Clients” on page 8).</td>
</tr>
</tbody>
</table>

Appendix C
Application Endpoints
Web Service Interfaces

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, as well as other administrative-console configurations, and then import them to target environments (see “Automating Configuration Migration” on page 64).

- **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 122.

**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:
Appendix D  
Web Service Interfaces

- As a utility to migrate changes to a partner connection through 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, 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 140.

For information about exporting IdP connection at an SP site, see “Using the Manage Connections Screen” on page 239.

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");
```
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();
Call call = (Call) service.createCall();
call.setUsername("username");
call.setPassword("password");
String addr = "https://localhost:9999/pf-mgmt-ws/ws/ConnectionMigrationMgr";
call.setTargetEndpointAddress(addr);
call.setOperationName("saveConnection");
String xml = "<EntityDescriptor entityID="some_entity_id" ..."</EntityDescriptor>";
```
boolean allowUpdate = false;
call.invoke(new Object[]{xml, allowUpdate});

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 client of this Web Service 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:
```
https://<host_server>:<admin_console_port>/pf-mgmt-ws/ws/
ConfigReplication?wsdl
```
The Web Service exposes the following method:
```java
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 IdP connections configured for SP-initiated SSO. The list contains each IdP's Connection ID and Connection Name
- **getSPList** – Returns a list of active SP connections configured for IdP-initiated SSO. The list contains 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 389).

- **getAdapterInstanceList** – Returns a list of SP adapter instances containing an ID and name.
Appendix D
Web Service Interfaces

- **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 122). 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>
```
<getIDPListResponse>
  <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>
    <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" :
```
Appendix E

Using Attribute Mapping Expressions

#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

**Note:** Use the following construction for any attributes from any source that contain special characters (hyphens, for example), which cannot be parsed by OGNL:

```java
#this.get("<attribute_name>")
```

**Important:** Because OGNL uses the “at” symbol (@) to reference static Java methods, expressions containing the symbol must be enclosed in double quotes; otherwise, expression parsing will fail. For example:

```java
#SAML_SUBJECT="usr@msn.com"
not:
#SAML_SUBJECT=usr@msn.com
```

For data-store attributes, use this syntax (for example):

```java
#this.get("ds.amount")
```

For more information, see “Using the OGNL Edit Screen” on page 393.

For more information about OGNL, including detailed user documentation, see the OGNL Web site ([www.opensymphony.com/ognl](http://www.opensymphony.com/ognl)).

### 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:

```xml
<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 5), and the feature is available on the SaaS-provisioning attribute-mapping screen (when SaaS Provisioning itself is enabled—see “SaaS Provisioning” on page 24).

![Figure 5: 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.

**Tip:** For information about using OGNL, refer to the OGNL Web site (www.opensymphony.com/ognl).

- To reach the OGNL editor, click **Edit** under Actions for an expression on any of the attribute Fulfillment screens.
Appendix E
Using Attribute Mapping Expressions

Here is an example of the edit screen, from the IdP configuration flow:

![Edit Screen Example](image)

To test an expression:
1. Enter an input value in the Value 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. Support is also available at support.pingidentity.com.

This appendix contains the following sections:
- “Data Stores” on page 395
- “Installation” on page 396
- “Protocols” on page 396
- “Server” on page 396

## Data Stores

**Table 17: 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>
<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 PingFederate (see “Trusted Certificate Authorities” on page 112).</td>
</tr>
</tbody>
</table>
### Installation

**Table 18: Troubleshooting 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>
</tbody>
</table>

### Protocols

**Table 19: Troubleshooting 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 79).</td>
</tr>
</tbody>
</table>

### Server

**Table 20: 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>
Glossary

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 or STS processing.
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.

definition
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 an IdP’s site. For example, the user is logged on to the 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.

**<RequestSecurityToken>**
(RST) WS-Trust or WS-Federation XML element identifying a request for validation of a security token, or for validation and then issuance of a replacement security token.

**<RequestSecurityTokenResponse>**
WS-Trust or WS-Federation XML element identifying a response to an RST and containing either the status of the submitted security token or both the status and (if requested and the received token is valid) a newly issued token for further SSO or Web-Services processing.

**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.

**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.

**Security Token Service**
An entity responsible for responding to WS-Trust requests for validation and issuance of security tokens used for SSO authentication to Web Services.

**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.

**token exchange**
The process by which a security token is exchanged for another security token.

**token translators**
An aggregate term for both token processors (used by the IdP PingFederate Security Token Service (STS) to handle different types of incoming security tokens) and token generators (used by the SP PingFederate STS to issue various types of tokens).

**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 Security**
A standard mechanism for securing Web Service interactions, often by binding a security token to the Web Service request.

**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.

**Web Service Client**
An entity that requests a Web Service interaction. In the context of an STS, the Web Service Client would request that a security token be issued for the interaction.

**Web Service Enhancement**
Supplemental software for the .NET framework provided by Microsoft.

**Web Service Provider**
In the context of an STS, an entity that requests validation of the security token sent with a client’s request for service.

**WS-SX**
The OASIS committee working on WS-Trust.

**WS-Trust**
A standard protocol by which an application can request that an STS issue, validate, or exchange security tokens.
# List of Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACS</td>
<td>Assertion Consumer Service</td>
<td></td>
</tr>
<tr>
<td>API</td>
<td>Application Programmer Interface</td>
<td></td>
</tr>
<tr>
<td>ARS</td>
<td>Artifact Resolution Service</td>
<td></td>
</tr>
<tr>
<td>CA</td>
<td>Certificate Authority</td>
<td></td>
</tr>
<tr>
<td>CRL</td>
<td>Certificate Revocation List</td>
<td></td>
</tr>
<tr>
<td>CSR</td>
<td>Certificate Signing Request</td>
<td></td>
</tr>
<tr>
<td>DBMS</td>
<td>Database Management System</td>
<td></td>
</tr>
<tr>
<td>DMZ</td>
<td>Demilitarized Zone</td>
<td></td>
</tr>
<tr>
<td>DN</td>
<td>Distinguished Name (certificate identifier)</td>
<td></td>
</tr>
<tr>
<td>DNS</td>
<td>Domain Name System</td>
<td></td>
</tr>
<tr>
<td>EIM</td>
<td>Enterprise Identity Management</td>
<td></td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
<td></td>
</tr>
<tr>
<td>HTTP</td>
<td>HyperText Transfer Protocol</td>
<td></td>
</tr>
<tr>
<td>HTTPS</td>
<td>Secure HyperText Transfer Protocol</td>
<td></td>
</tr>
<tr>
<td>IdM</td>
<td>Identity Management</td>
<td></td>
</tr>
<tr>
<td>IdP</td>
<td>Identity Provider</td>
<td></td>
</tr>
<tr>
<td>IP</td>
<td>Internet Protocol</td>
<td></td>
</tr>
<tr>
<td>J2SDK</td>
<td>Java 2 Software Development Kit</td>
<td></td>
</tr>
<tr>
<td>JDBC</td>
<td>Java Database Connectivity (JDBC)</td>
<td></td>
</tr>
<tr>
<td>LDAP</td>
<td>Lightweight Directory Access Protocol</td>
<td></td>
</tr>
<tr>
<td>O</td>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>OASIS</td>
<td>Organization for the Advancement of Structured Information Standards</td>
<td></td>
</tr>
<tr>
<td>OCSP</td>
<td>Online Certificate Status Protocol</td>
<td></td>
</tr>
<tr>
<td>OU</td>
<td>Organizational Unit</td>
<td></td>
</tr>
<tr>
<td>PKI</td>
<td>Public Key Infrastructure</td>
<td></td>
</tr>
<tr>
<td>RDBMS</td>
<td>Relational Database Management System</td>
<td></td>
</tr>
<tr>
<td>RST</td>
<td>&lt;RequestSecurityToken&gt;</td>
<td></td>
</tr>
<tr>
<td>RSTR</td>
<td>&lt;RequestSecurityTokenResponse&gt;</td>
<td></td>
</tr>
<tr>
<td>SAML</td>
<td>Security Assertion Markup Language</td>
<td></td>
</tr>
<tr>
<td>SaaS</td>
<td>Software as a Service</td>
<td></td>
</tr>
<tr>
<td>SDK</td>
<td>Software Development Kit</td>
<td></td>
</tr>
<tr>
<td>SP</td>
<td>Service Provider</td>
<td></td>
</tr>
<tr>
<td>SLO</td>
<td>Single Logout</td>
<td></td>
</tr>
<tr>
<td>SOA</td>
<td>service-oriented architecture</td>
<td></td>
</tr>
<tr>
<td>SOAP</td>
<td>Simple Object Access Protocol</td>
<td></td>
</tr>
<tr>
<td>SQL</td>
<td>Structured Query Language</td>
<td></td>
</tr>
<tr>
<td>SSL</td>
<td>Secure Sockets Layer</td>
<td></td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---------</td>
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</tr>
<tr>
<td>SSL/TLS</td>
<td>Secure Sockets Layer/Transport Level Security</td>
<td></td>
</tr>
<tr>
<td>SSO</td>
<td>Single Sign-On</td>
<td></td>
</tr>
<tr>
<td>SSTC</td>
<td>Security Services Technical Committee (of OASIS)</td>
<td></td>
</tr>
<tr>
<td>STS</td>
<td>Security Token Service</td>
<td></td>
</tr>
<tr>
<td>TCP</td>
<td>Transmission Control Protocol</td>
<td></td>
</tr>
<tr>
<td>URI</td>
<td>Uniform Resource Identifier</td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td>Uniform Resource Locator</td>
<td></td>
</tr>
<tr>
<td>WCF</td>
<td>Windows Communication Foundation</td>
<td></td>
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<tr>
<td>WIF</td>
<td>Windows Identity Foundation</td>
<td></td>
</tr>
<tr>
<td>WSC</td>
<td>Web Service Client</td>
<td></td>
</tr>
<tr>
<td>WSP</td>
<td>Web Service Provider</td>
<td></td>
</tr>
<tr>
<td>WSS</td>
<td>Web Services Security</td>
<td></td>
</tr>
<tr>
<td>XASP</td>
<td>X.509 Attribute Sharing Profile</td>
<td></td>
</tr>
<tr>
<td>XML</td>
<td>Extensible Markup Language</td>
<td></td>
</tr>
</tbody>
</table>
Index

A
access control 49
account linking 9
  configuring 248
account mapping 9
accounts, administrator 49
activation
  for IdP connection 297
  for SP connection 209
adapters
  commercial 9
  configuring
    IdP 128
    SP 222
integration 8
mapping URLs to SP 226
administrative console
  certificate authentication to 55
  lockout recovery 50
  logging on using LDAP 55
administrators, adding 51
affiliations, SP 210
application endpoints
  IdP 134
  SP 230
archiving data 46
artifact
  lifetime, setting for IdP connections 268
  lifetime, setting for SP connections 180
Assertion Consumer Service URLs 175
assertions
  content 152
  lifetime 151
  mapping attributes to 158
attribute authority (XASP), configuring 285
attribute contract 12
  default for SP connection 173
  IdP connection 249
  to SP 154
attribute query
  configuring for IdP connection 285
  configuring for SP connection 184
  mapping names 286
attribute sources
  custom 99
  failover (for IdP) 160
  for IdP 160
attributes
  mapping
    about 9
    for SP connection 169, 186, 331, 351
    for user provisioning 281
masking in log files 15, 33
overview 11
sources for express provisioning 274
audit logging 27
Auto-Connect
  about 21
  activation (IdP connection) 299
  activation (SP connection) 219
allowed IdP domains 300
allowed SP domains 219
configuring (as an IdP) 217
configuring (as an SP) 298
metadata lifetime 90
metadata signing 89
B

back-channel settings
  for IdP connections 288
  for SP connections 189
backups, administrative console 46
bindings
  allowable
    for IdP connection 267
    for SP connection 179
configuring
  for IdP connection 245
  for SP connection 148
SOAP for IdP connection 288
  SOAP for SP connection 189

C

certificate authority (CA) 110
certificates
  authority, verifying 20
  considerations 26
  digital signing 115
  expiration notification 77
  exporting 118
  for metadata 44
  for SOAP authentication 26
  importing 118
  management 16
  revocation of 122
  selecting XML decryption (SP-to-IdP) 296
  selecting XML encryption (SP-to-IdP) 295
  signature verification 119
SSL 76, 111
  SSL client 113
trust models for 18
  verifying 20
checklist, for federation 26
custom data stores
  filters (IdP connections) 261
  filters (SP connections) 169, 351
  selecting fields (IdP connections) 261
  selecting fields (SP connections) 169

d
data archiving 46
data exchange
  automated 28
  for IdP connection 29
  for SP connection 28
data store 27
  description 15
  for attribute query profile 185
  introduction 90
  JDBC configuration 92
  LDAP configuration 97
  selecting
    for express provisioning 88, 274
    for IdP connection 254
    for SaaS provisioning 201
    for SP connection 161
troubleshooting 393
database
  filter
    for IdP connection 256
    for IdP connection 255
    for SP connection 162
database filter
  for SP connection 164, 346
decryption keys
  for IdP connections 296
  for SP connections 197
defederation 10
digital signatures
  about 16
  keys and certificates 115
  policy 18
digital signing
  for IdP connection 290
  for metadata 44
  for SP connection 191
directory service
  code example 386
  SOAP example 387
  SSO 385
discovery, IdP 101
domains
  allowed for IdP Auto-Connect 300
  allowed for SP Auto-Connect 219
domain

e
email
  addresses 77
  notifications 77
modes 35
transaction 35
using Common Event Format 41

M
main menu
for IdP connection 234
for SP connection 136
mapping
adapters
    URLs to SP 226
attributes
    configuring for SP connection 169, 186, 331, 351
    identity 9, 152, 248
masking attributes 15
masking attributes in logs 33
message
    signing 16
    validation 17, 26
metadata
    exporting 42
    exporting XML encryption certificates 45
    importing
        for IdP connection 239
        for SP connection 143
lifetimes for Auto-Connect 90
provisioning
    event trigger for 284
    mapping attributes for 281
provisioning, as SP
    choosing data stores for 274
provisioning, SaaS
    choosing internal data store 88
    choosing source data stores for 201
pseudonyms
    unique values for 131

N
name identifiers
    SAML 2.0 152
    WS-Federation 154
notifications
    runtime 77

O
Object-Graph Navigation Language (OGNL), editing 391

P
password notification 49
passwords
    changing 54
    resetting 52
planning checklist 26
pooling options
    database 94
    LDAP 99
profiles
    configuring
        for IdP connection 245
        for SP connection 148
    saving configuration
        for IdP connection 183, 272
protocol endpoints
    IdP 134
    SP 232
protocols
    choosing 83
    troubleshooting 394
provisioning
    enabling 245
    event trigger for 284
    mapping attributes for 281
provisioning, as SP
    choosing data stores for 274
provisioning, SaaS
    choosing internal data store 88
    choosing source data stores for 201
pseudonyms
    unique values for 131

R
requester mapping, for XASP 230
resetting passwords 52
roles, choosing IdP/SP 83
runtime
    configuration 58
    reporting 78

S
SAML
    selecting 83
SAML 1.1
    SP connection steps 148, 244
SAML 2.0
    SP connection steps 148, 244
SDK 9
security
    back channel 26
    considerations 16
    server
        troubleshooting 394
        server HTTP checking 379
        server ID 27
        server monitoring 78
        server status verification 379
service URL
  IdP, for WS-Fed 265
  SP, for WS-Fed 177
session integration considerations 27
signature verification 119
Signing 89
signing XML files 45
SLO service URLs 178
SNMP configuration 78
SOAP responder URL 28
SP
  adapters 222
  connections
    activation 209
    introduction 127
  default URL 228
SP-initiated SLO, configuring
  for IdP connection 247
  for SP connection 150
SP-initiated SSO, configuring
  for IdP connection 246
  for SP connection 150
SSL 16
  about 19
  certificates 111
  keys and certificates 113
  using for LDAP 98
SSO directory service 385
standards
  choosing 83
starting the server
  Linux 32
  Windows 32
stopping the server
  Linux 32
  Windows 32
summary
  for IdP connection 297
  for SP connection 209
synchronization
  clock 27
  provisioning 88
system administration (single or multiple users) 76

U
unique IDs 27
unique values, for pseudonym creation 131
upgrading PingFederate 46
user management
  setting 76
users
  account management 49
  adding 51

V
validating messages 26
verifying certificates 20
virtual host names 58
virtual IDs 27
  for IdP servers 138
  for SP servers 235

W
Web Services
  connection management 381
  SSO Directory 385
Web templates 70
where clause
  for IdP connection 256
  for SP connection 164, 346
WS-Federation
  selecting 83
  setting realm ID 85
  SP connection steps 148, 244
  SP service URL 177, 265
WS-Trust STS
  configuring request parameters 314
  enabling 303
  IdP connections 338
  mapping request parameters 320
  SP connections 315

X
X.509 certificates 16
XASP
  requester mapping 230
XML encryption 16
  about 20
  exporting keys to metadata 45
  IdP-to-SP 182
  SP-to-IdP 271
XML files, signing 45