Salesforce.com

Contents

Introduction

This document covers the integration of Swivel with Salesforce.com.

Prerequisites

Salesforce.com Adminisrative Account

Swivel virtual or hardware appliance or server

PINsafe salesforce software Download and unzip the salesforce.war file

The Swivel server needs to be accessible accross the internet for the Salesforce.com server to connect, and the IDP is usually deployed so that it can also be access from the Internet. For security using a Swivel hardware or virtual appliance, the IDP is usually deployed in /webapps2 and accessible on port 8443 (or using a PAT on the appliance using 443)

Baseline

Salesforce 11, 12

Swivel 3.8, 3.9

Architecture

Salesforce.com users authenticate using SAM-L authentication against Swivel

Installation

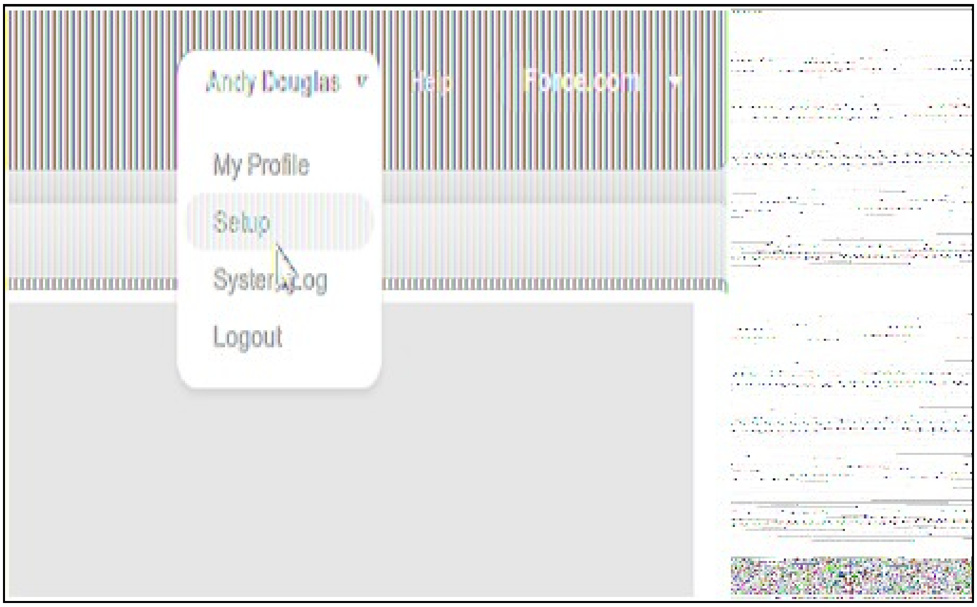
Salesforce.com Configuration

Allow Authentication

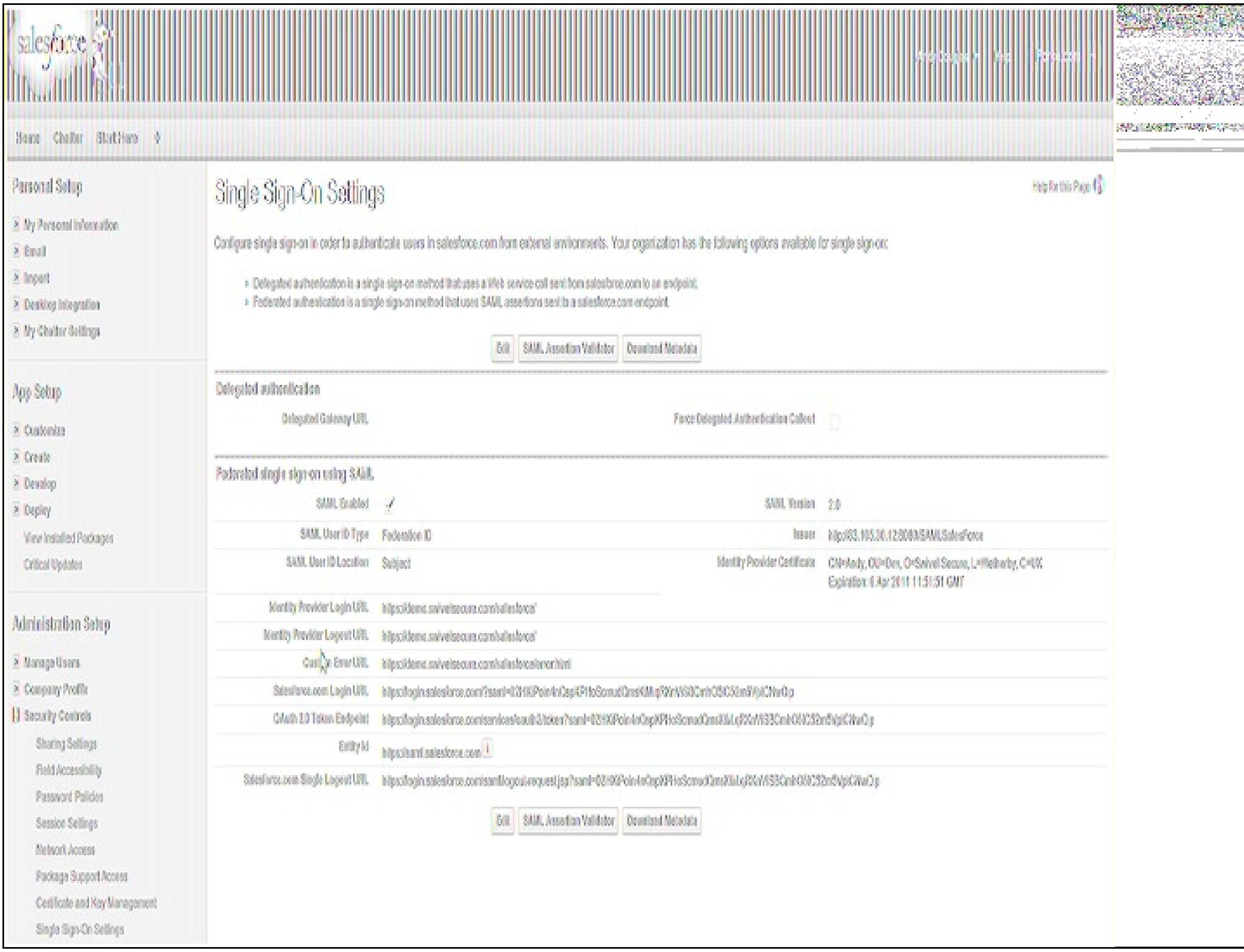
Contact Salesforce.com to enable Federated SSO

Configure Single Sign On

Using an administrative user logon to Salesforce.com and select 'Setup' from the top right button with the the user name on.



Each version of Salesforce is slightly different but each should have a screen similar to the below reached from Setup->Administrative Setup->Security Controls->Single Sign-On Settings



Single Sign-On Settings

Configure single sign-on in order to authenticate users in salesforce.com from external environments. Your organization has the following options available for single sign-on:

- Delegated authentication is a single sign-on method that uses a Web service call sent from salesforce.com to an endpoint.
- Federated authentication is a single sign-on method that uses SAML assertions sent to a salesforce.com endpoint.

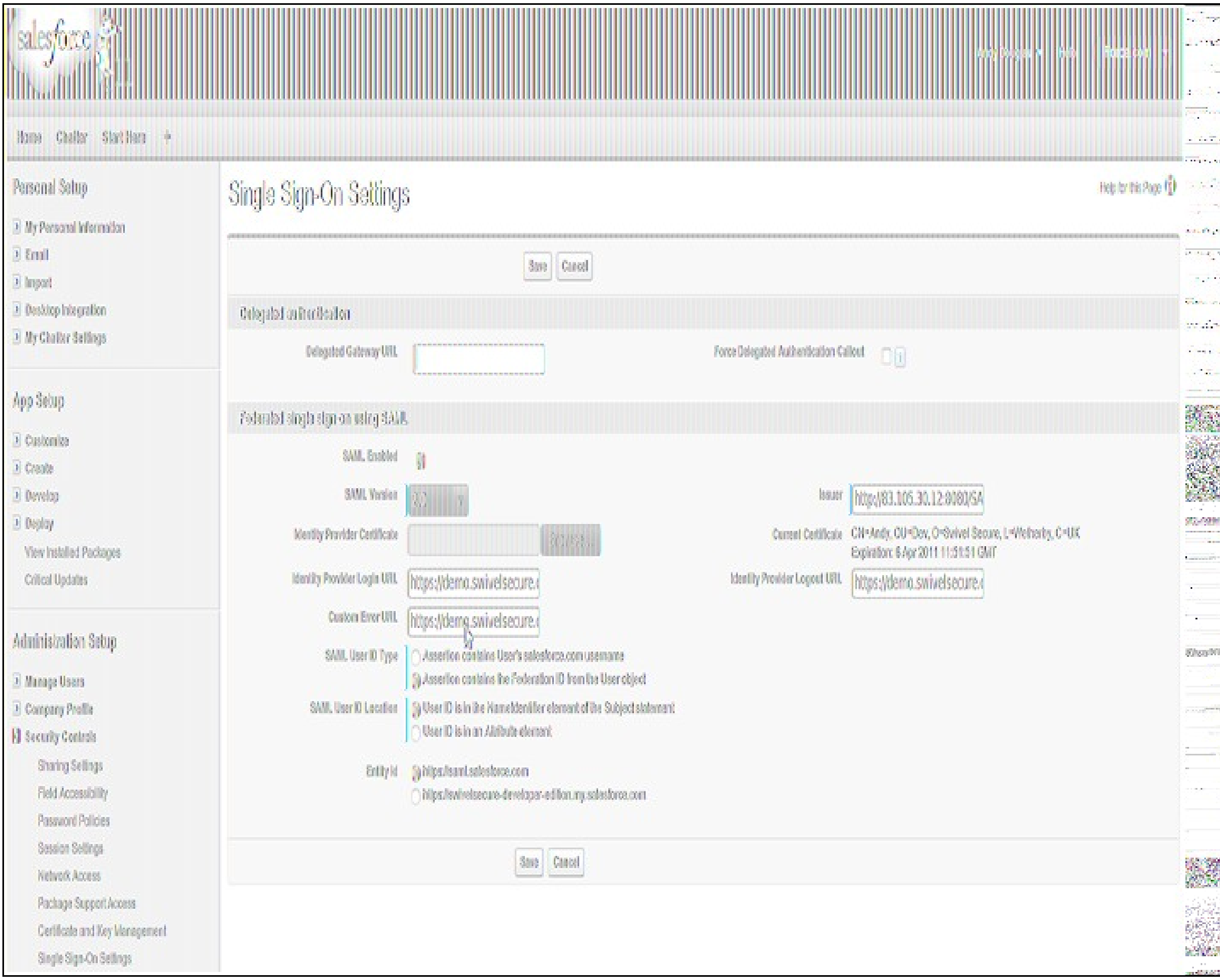
Delegated authentication

Delegated Gateway URL		Force Delegated Authentication Callout	□

Federated single sign-on using SAML

SAML Enabled	✓	SAML Version	2.0
SAML User ID Type	Federation ID	Issuer	http://83.105.36.12:8080/SAMLSalesForce
SAML User ID Location	Subject	Identity Provider Certificate	CN=Andy, OU=Dev, O=Swivel Secure, L=Wetherby, C=UK Expiration: 6 Apr 2011 11:51:51 GMT
Identity Provider Login URL	https://demo.swivelsecure.com/salesforce/		
Identity Provider Logout URL	https://demo.swivelsecure.com/salesforce/		
Custom Error URL	https://demo.swivelsecure.com/salesforce/error.html		
Salesforce.com Login URL	https://login.salesforce.com/?saml=02HKiPoin4nCapKPHoScmudQmsKMLq9SnVIS3CmhO5IC5Xm5VpjCNwOp		
OAuth 2.0 Token Endpoint	https://login.salesforce.com/services/oauth2/token?saml=02HKiPoin4nCapKPHoScmudQmsKMLq9SnVIS3CmhO5IC52m5VpjCNwOp		
Entity Id	https://saml.salesforce.com		
Salesforce.com Single Logout URL	https://login.salesforce.com/saml/logout-request.jsp?saml=02HKiPoin4nCapKPHoScmudQmsKMLq9SnVIS3CmhO5IC52m5VpjCNwOp		

Click on Edit. At this point you should get something similar to the screen below:



Single Sign-On Settings

Delegated authentication

Delegated Gateway URL:
Force Delegated Authentication Callout: □

Federated single sign on using SAML

SAML Enabled: ☑
SAML Version: 2.0
Issuer: https://83.105.30.12:8080/SA
Identity Provider Certificate:
Current Certificate: CN=Andy, OU=Dev, O=Swivel Secure, L=Wetherby, C=UK
Expiration: 6 Apr 2011 11:51:51 GMT
Identity Provider Login URL: https://demo.swivelsecure.c
Identity Provider Logout URL: https://demo.swivelsecure.c
Custom Error URL: https://demo.swivelsecure.c
SAML User ID Type: ○ Assertion contains User's salesforce.com username
● Assertion contains the Federation ID from the User object
SAML User ID Location: ● User ID is in the NameIdentifier element of the Subject statement
○ User ID is in an Attribute element
Entity Id: ● https://saml.salesforce.com
○ https://swivelsecure-developer-edition.my.salesforce.com

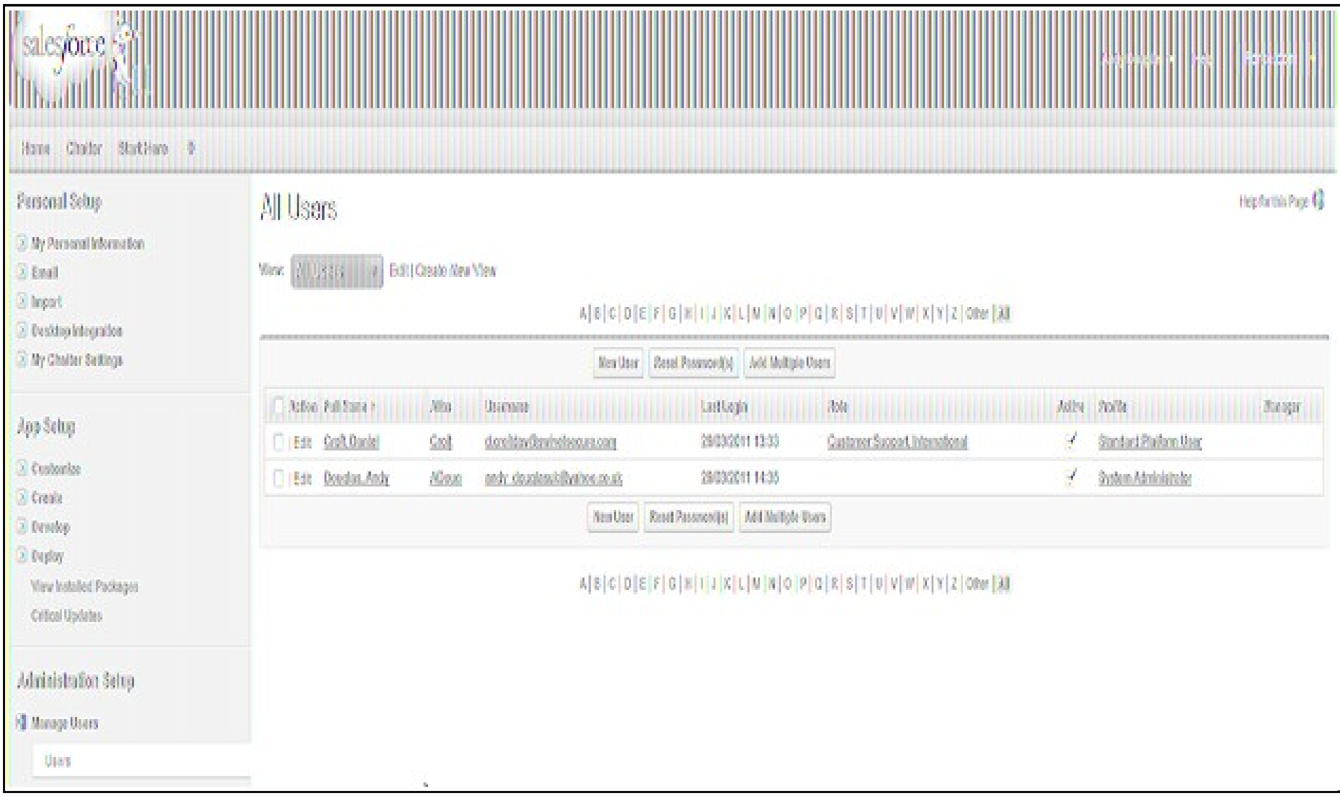
a) upload the certificate and set the issuer

b) set the login URL and logout URL to point to the instance of salesforce-pinsafe you will have running (pointing to the instance is fine as it will re-direct to the logon page automatically)

c) set the remaining settings as above

Entity ID The issuer in SAML requests generated by Salesforce, and is also the expected audience of any inbound SAML Responses. If you don?t have domains deployed, this value is always Entity ID https://saml.salesforce.com. If you have domains deployed, Salesforce recommends that you use your custom domain name.

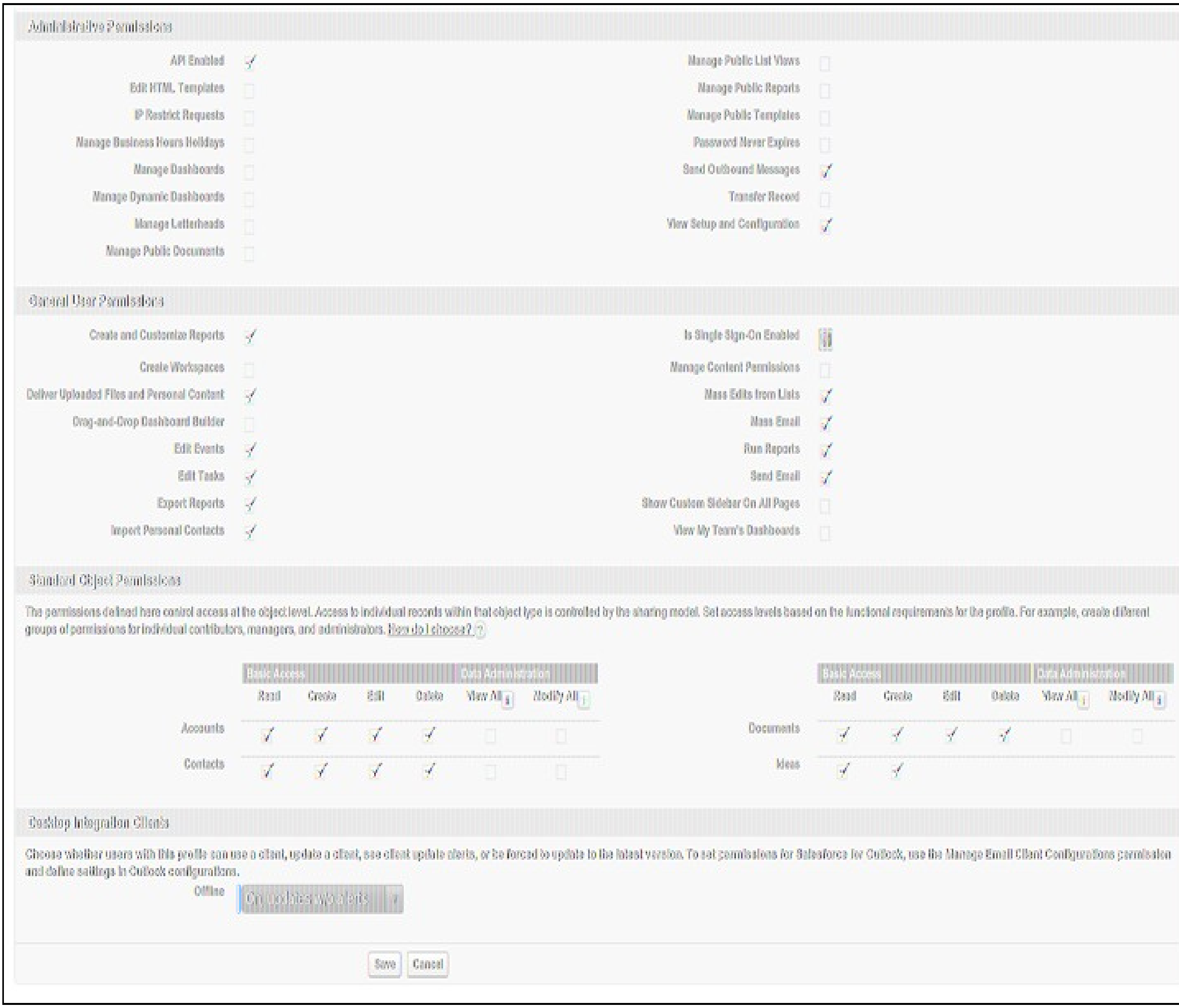
Ensure the users that you wish to use SSO are using a profile that has SSO enabled. Click Manage Users->Users. The profile assigned to each user is on the right hand side.



All Users

□ Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
□ Edit	Croft, Daniel	Croft	[illegible]	28/03/2011 13:33	Customer Support, International	✓	Standard Platform User	
□ Edit	Douglas, Andy	ADoug	andy_douglas@yahoo.co.uk	28/03/2011 14:35		✓	System Administrator	

Click on the profile and find the SSO option as shown below, ensure it is enabled. If it isn't then click edit and enable it.



Administrative Permissions

API Enabled	✓	Manage Public List Views	□
Edit HTML Templates	□	Manage Public Reports	□
IP Restrict Requests	□	Manage Public Templates	□
Manage Business Hours Holidays	□	Password Never Expires	□
Manage Dashboards	□	Send Outbound Messages	✓
Manage Dynamic Dashboards	□	Transfer Record	□
Manage Letterheads	□	View Setup and Configuration	✓
Manage Public Documents	□		

General User Permissions

Create and Customize Reports	✓	Is Single Sign-On Enabled	☑
Create Workspaces	□	Manage Content Permissions	□
Deliver Uploaded Files and Personal Content	✓	Mass Edits from Lists	✓
Drag-and-Drop Dashboard Builder	□	Mass Email	✓
Edit Events	✓	Run Reports	✓
Edit Tasks	✓	Send Email	✓
Export Reports	✓	Show Custom Sidebar On All Pages	□
Import Personal Contacts	✓	View My Team's Dashboards	□

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. How do I choose?

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	□	□
Contacts	✓	✓	✓	✓	□	□

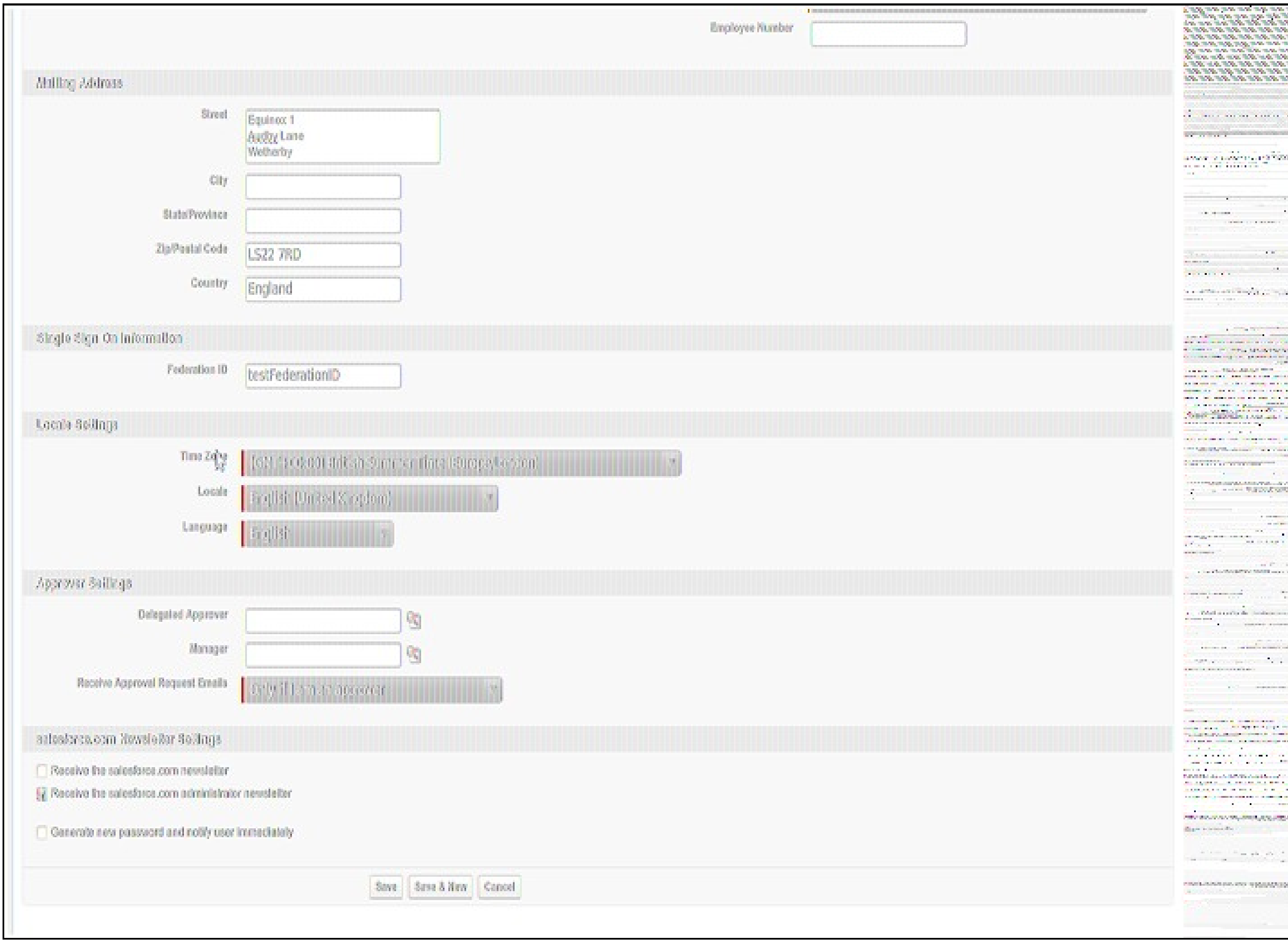
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Documents	✓	✓	✓	✓	□	□
Ideas	✓	✓				

Desktop Integration Clients

Choose whether users with this profile can use a client, update a client, see client update alerts, or be forced to update to the latest version. To set permissions for Salesforce for Outlook, use the Manage Email Client Configurations permission and define settings in Outlook configurations.

Offline: On updates w/o alerts

Ensure the users have a Federation ID which will map to their Swivel username. Click Manage Users->Users, select a user then enter the Federation ID



Employee Number

Mailing Address

Street: Equinox 1
Audby Lane
Wetherby

City:

State/Province:

Zip/Postal Code: LS22 7RD

Country: England

Single Sign On Information

Federation ID: testFederationID

Locale Settings

Time Zone: (GMT+01:00) British Summer Time (Europe/London)

Locale: English (United Kingdom)

Language: English

Approver Settings

Delegated Approver:

Manager:

Receive Approval Request Emails: Only if I am an approver

salesforce.com Newsletter Settings

□ Receive the salesforce.com newsletter

☑ Receive the salesforce.com administrator newsletter

□ Generate new password and notify user immediately

Configure The Swivel Server

Configure a Swivel Agent (For standard XML Authentication)

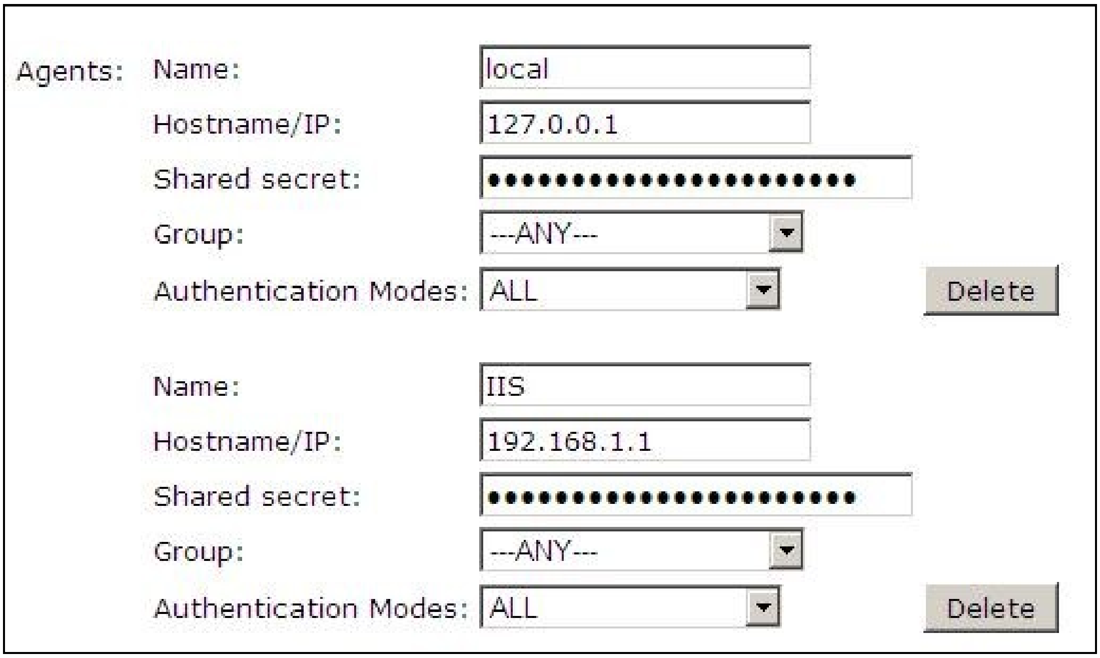
1. On the Swivel Management Console select Server/Agent

2. Enter a name for the Agent

3. Enter the IP address or hostname for the server where the salesforce.war is installed, if installed on the same server as the Swivel server use 127.0.0.1 or localhost, a default entry may already exist for this

4. Enter the shared secret to be used above on the below server configuration.

5. Click on Apply to save changes

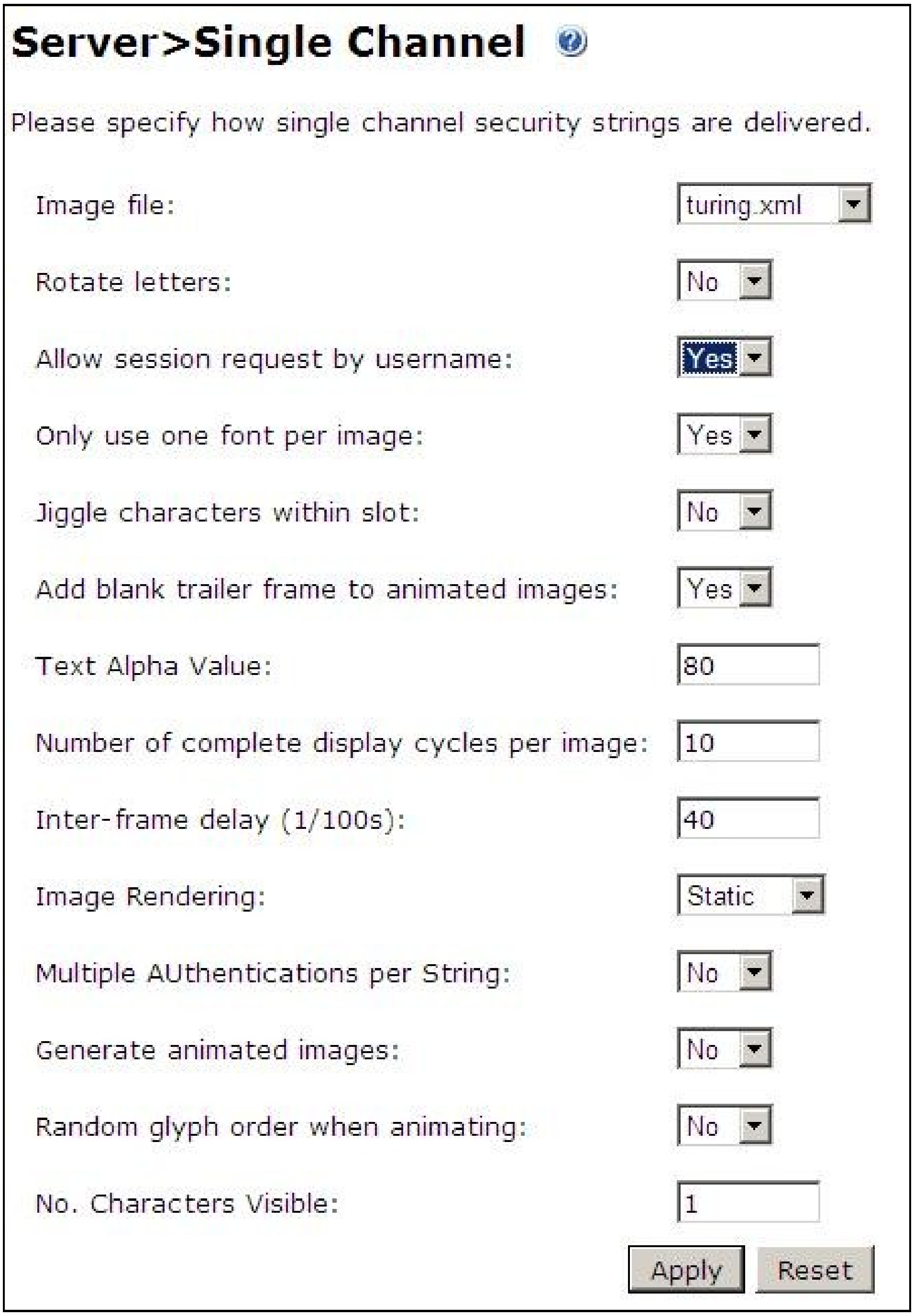


Agents:	Name:	local
	Hostname/IP:	127.0.0.1
	Shared secret:	••••••••••••••••••••••
	Group:	---ANY---
	Authentication Modes:	ALL
	Name:	IIS
	Hostname/IP:	192.168.1.1
	Shared secret:	••••••••••••••••••••••
	Group:	---ANY---
	Authentication Modes:	ALL

Configure Single Channel Access

1. On the Swivel Management Console select Server/Single Channel

2. Ensure ?Allow session request by username? is set to YES



Server>Single Channel

Please specify how single channel security strings are delivered.

Image file: turing.xml

Rotate letters: No

Allow session request by username: Yes

Only use one font per image: Yes

Jiggle characters within slot: No

Add blank trailer frame to animated images: Yes

Text Alpha Value: 80

Number of complete display cycles per image: 10

Inter-frame delay (1/100s): 40

Image Rendering: Static

Multiple AUthentications per String: No

Generate animated images: No

Random glyph order when animating: No

No. Characters Visible: 1

Access Device or Application Integration

Client Side Installation

1.The SAML-salesforce war (salesforce.war) should be placed near a Swivel installation on a webserver. This could be a Swivel virtual or hardware appliance. On a Swivel virtual or hardware appliance this would need to be copied to the /usr/local/tomcat/webapps2 folder.

2.Inside the saleforce war exists a properties file (WEB-INF->settings.xml). Initially this will look something like:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE properties SYSTEM "http://java.sun.com/dtd/properties.dtd">

<properties>
<entry key="ssl">false</entry>
<entry key="server">localhost</entry>
<entry key="port">8080</entry>
<entry key="context">pinsafe</entry>
<entry key="imagessl">true</entry>
<entry key="imageserver">demo.swivelsecure.com</entry>
<entry key="imagecontext">proxy</entry>
<entry key="imageport">8443</entry>
<entry key="secret">secret</entry>
<entry key="selfsigned">true</entry>
<entry key="salesforceURL">https://login.salesforce.com/?saml=02HKiPoin4nQspKPHoScmudQmsKtM.qRKnViSBCmhO5IC52m5VptCNwO.p</entry>
<entry key="audience">https://saml.salesforce.com</entry>
<entry key="certificateIssuer">http://83.105.30.12:8080/SAMLSalesForce</entry>
<entry key="publicKeyFilePath">./keys/pinsafe/ssl/dsapubkey.der</entry>
```

```
  <entry key="privateKeyFilePath">./keys/pinsafe/ssl/dsaprivkey.der</entry>
  <entry key="certificate">./keys/pinsafe/ssl/dsacert.pem</entry>
  </properties>
```

These settings should be changed to match, additional field values may need to be created as above:

- The settings for the local Swivel server

For a Swivel virtual or hardware appliance the settings may be:

```
  <entry key="ssl">false</entry>
  <entry key="server">localhost</entry>
  <entry key="context">pinsafe</entry>
  <entry key="port">8181</entry>
  <entry key="imagessl">true</entry>
  <entry key="imageserver">demo.swivelsecure.com</entry>
  <entry key="imagecontext">proxy</entry>
  <entry key="imageport">8443</entry>
  <entry key="secret">secret</entry>
  <entry key="selfsigned">true</entry>
```

For a Swivel software install the settings may be:

```
  <entry key="ssl">false</entry>
  <entry key="server">localhost</entry>
  <entry key="context">pinsafe</entry>
  <entry key="port">8080</entry>
  <entry key="imagessl">false</entry>
  <entry key="imageserver">demo.swivelsecure.com</entry>
  <entry key="imagecontext">pinsafe</entry>
  <entry key="imageport">8080</entry>
  <entry key="secret">secret</entry>
  <entry key="selfsigned">true</entry>
```

- The settings as per the salesforce setup (Setup->Administrative Setup->Security Controls->Single Sign-On Settings)
- The location of the keys (which must match the certificate installed in salesforce)

```
  <entry key="publicKeyFilePath">./keys/pinsafe/ssl/dsapubkey.der</entry>
  <entry key="privateKeyFilePath">./keys/pinsafe/ssl/dsaprivkey.der</entry>
```

Key and Certificate Generation

see Key and Certificate Generation

Additional Installation Options

Verifying the Installation

In a browser, go to the root URL for the saml-salesforce client. This will redirect to the logon page. Logging in as a user will send a saml assertion for the username you logged in as. If this username matches to a FederationID for a user in Saleforce (see above) then you will be logged in as that user

Uninstalling the Swivel Integration

Troubleshooting

Known Issues and Limitations

Additional Information