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# 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.

 Andy Douglas •	Helpi Force.com v	
Setup Syster 200 Logout		

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

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Administration Setup 2) Manage Users 2) Company Postle 3) Security Controls Sharing Settings Field Accessibility Password Policies	Custom Error UIII. https://demog.swivelsecure./ SMIL. User ID Type Assertion contains the Pederation ID from the User object SMIL. User ID Location Star ID is in the Hameldeniller element of the Subjectstatement SMIL. User ID Location Viser ID is in an Abitrute element Entity M https://sami.salostoree.com https://sami.salostoree.com			
Session Settings Network Access	Same Cancel			

#### 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.

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Manage Users Users	

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.

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Drag-and-Drop Dashboard Build	er							Mass Email	1					
Edit Even	ts	1						Run Reports	1					
Edit Tas	ks	1						Send Email	1					
Export Report	ts	1						Show Custom Sidebar On All Pages						
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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

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Mailling Addrass				
Street	Equinox 1 Aug222 Lane Welherby			
City				10 00 1 0 1 10 10 10 10 10 10 10 10 10 1
State/Province				
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Country	England			
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## **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	Delete
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	Name:	IIS	
	Name: Hostname/IP:	IIS 192.168.1.1	
	Name: Hostname/IP: Shared secret:	IIS 192.168.1.1	
	Name: Hostname/IP: Shared secret: Group:	IIS 192.168.1.1 ANY	

### **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 stri	ngs 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
	Apply Reset

## 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"? properties SYSTEM "http://java.sun.com/dtd/properties.dtd"
<properties> <entry key="ssl">false</entry> <entry key="server">localhost</entry> <entry key="context">pinsafe</entry> <entry key="context">pinsafe</entry> <entry key="imagessl">true</entry> <entry key="imagessl">true</entry></properties>
<pre>centry key= imagesenter / used to set t</pre>
<pre>centry key="imageport"&gt;8443</pre> /entry>
<entry key="secret">secret</entry>
<pre><entry key="selfsigned">true</entry></pre>
<pre><entry key="salesforceURL">https://login.salesforce.com/?saml=02HKiPoin4nQspKPHoScmudQmsKtM.qRKnViSBCmh05IC52m5VptCNw0.p</entry></pre>
<pre><entry key="audience">https://saml.salesforce.com</entry></pre>
<pre><entry key="certificateIssuer">http://83.105.30.12:8080/SAMLSalesForce</entry></pre>
<pre><entry key="publicKeyFilePath">./keys/pinsafe/ssl/dsapubkey.der</entry></pre>

<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="imageserver">demo.swivelsecure.com</entry>
<entry key="imageserver">demo.swivelsecure.com</entry>
<entry key="imagecontext">proxy</entry>
<entry key="imagecontext">ry><<entry>
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#### 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="imagecontext">server">entry key="imagecontext">server">entry key="imageserver">server">entry key="imagecontext">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server</server">server">server</server">server</server">server</server">server</server">server</server">server</server">server</server">server</server">server">server">server</server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server">server"
```

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