SSO (Single Sign-On) Integration & Use Case Capturing

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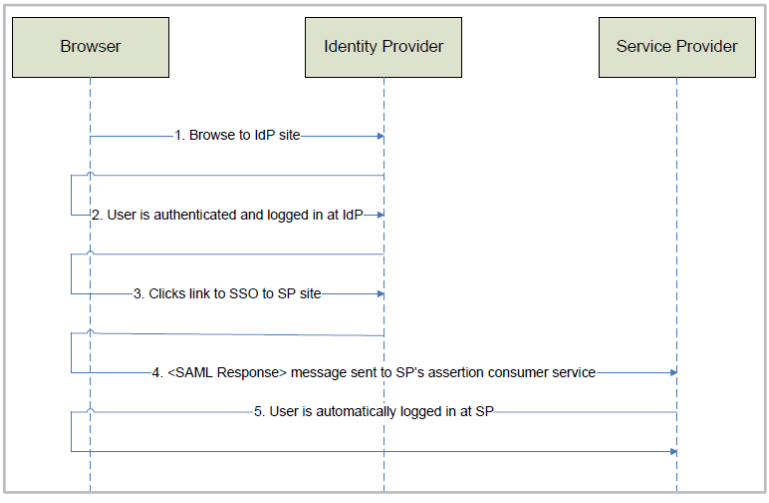
Introduction to SSO (Single-Sign-On)

Benefits of SSO

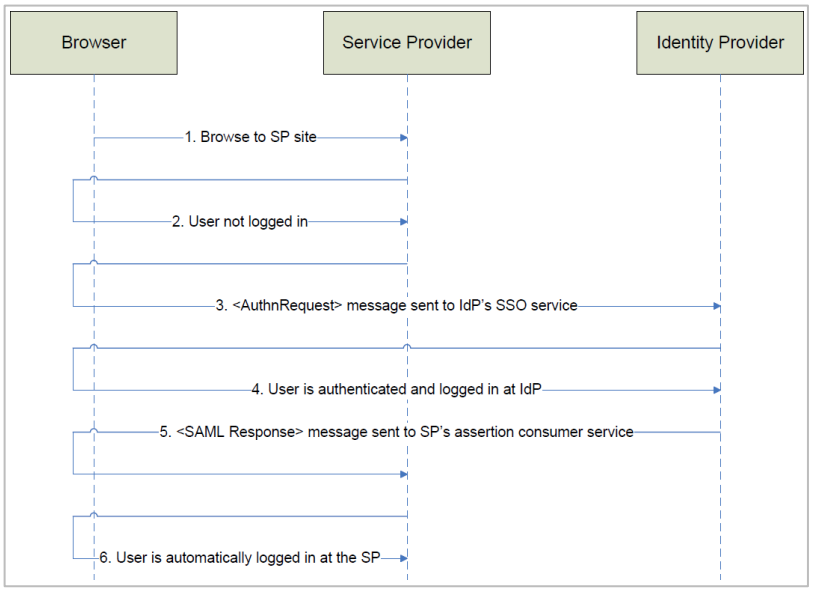
- Reduction in Administrative Costs: With Single Sign-On, all user authentication information resides in a central directory, which reduces user support requests around passwords.
- Time Saving: Sign-On also saves users' time, since each individual sign-on process can take 5 to 20 seconds to complete.
- Increased Security: The login credentials are stored at a single secure location. This is more secure than having the user create a separate login credential for each application or, even worse, re-use a password in multiple accounts.

SSO-Related Definitions

- **IDP** – also known as **Identity Provider**, is responsible for issuing identification information for all providers looking to interact / service with the system in any possible way, this is achieved via an authentication module which verifies a security token as an alternative to explicitly authenticating a user within a security realm.
- **IDP Initiated** SSO: In IDP-initiated SSO, the user starts at the IDP site, logs in and clicks a link to the SP site which initiates SSO.
    - **Example:** Customer Portal as IDP and ZINFI UPM as SP with IDP initiated SSO process:
        - The user browses to the Customer Portal.
    - If the user is not already authenticated, the user must present their credentials and login.
    - The user clicks a link to the ZINFI UPM site.
    - Customer Portal sends a SAML response containing a SAML assertion to ZINFI.
    - ZINFI uses the information contained in the SAML assertion, including the user's name and any associated attributes, and performs an automatic login.



- **SP** – in this context, it is referred to the Service Provider (The external providers that is providing service through SAML protocol)
- **SP Initiated** SSO– In SP-initiated SSO, the user starts at the SP site and, instead of logging in at the SP site, SSO is initiated with the IDP.
    - **Example:** Customer Portal as IDP and ZINFI UPM as SP with SP initiated SSO process:
        - The user browses to ZINFI site.
        - The user attempts to access a protected page requiring the user to be authenticated.
        - ZINFI sends an authentication request to IDP SSO service endpoint.
        - If the user is not already authenticated at Customer Portal, the user must present their credentials and login.
        - Customer Portal sends a SAML response containing a SAML assertion to ZINFI.
        - ZINFI uses the information contained in the SAML assertion, including the
        - user's name and any associated attributes, and performs an automatic login.



- **SAML 2.0** – Security Assertion Markup Language V2 which is XML-based open standard data format for exchanging authentication and authorization data between parties, in particular, between an identity provider and a service provider.

ZINFI UPM as IDP

SSO integration between ZINFI's UPM and the Customer SP Portal

This enables ZINFI's customers to authenticate themselves to the SP portal using their ZINFI portal credentials. If the user has logged into ZINFI portal on their browser, they can log into SP portal with a single click. This greatly simplifies account creation and reduces the number of passwords a user needs to remember.

What is the Process / Flow for Requirements Capturing & Set Up of SSO?

1. This document will be sent to the Vendor team to answer the questions needed PRIOR to the SSO Sales Call *(in the "SSO Questionnaire" section below).*
2. Once this is done, the SSO Sales call will be scheduled – and a ZINFI Sales Engineer (and Engineering team resources, if needed) will be assigned and join the call.
3. The SSO Sales Call happens, in which the Sales Engineer will drive the SSO discussion and walk through this document:
    a. The questions in the SSO Questionnaire that were answered by the Vendor Team are reviewed.
    b. The questions in the SSO Questionnaire that are to be answered DURING the Call are addressed and answered (or planned to complete).
    c. Notes are taken by the Sales Engineer, in the appropriate section, to capture any other concerns, information or use case needs.
4. Once the call is done and this document is filled out, it is handed off by the Sales Engineer to the Professional Services Manager (PSM) assigned to the project:
    a. This document, and the notes taken, are explained to the PSM.
    b. PSM uses the User Story document to capture further detailed information and full requirements.
    c. PSM creates the full Mock Up of what the SSO experience will look like.
    d. A formal review call is scheduled to go through the User Story and Mock Up with Engineering (ENG) prior to customer delivery. ENG provides live feedback and "okays" the docs to share with Customer.
5. PSM schedules & does a Customer walk-through call, to get approval of the User Story & Mock Up.
6. If no changes/revisions and everything is approved as is, no need for second ENG review
7. If modified, or changed by Vendor Team (during their walk through call) before approval, then must have a second formal review with ENG for acceptance of the final User Story and Mock Up.
8. In event of changes during configuration/development, this doc- as well as the User Story and Mock Up, are updated and re-submitted to Engineering. *All original docs get revised and re-approved via Teamwork Task (no emails to pass back and forth changes).*

SSO Questionnaire

#	Questions	Customer Feedback
Question to Answer PRIOR to the SSO Sales Call		
1.	Will your “technical team” be on this first Sales call to discuss SSO? *(if so, please answer affirmatively – so we can have the right resources on this call)*	
2.	Is SSO part of your Phase 1 (MVP) launch – or are you planning on doing this integration Post-Phase 1?	
3.	Are you looking to SSO “to” the ZINFI UPM from an external system, or “from” the ZINFI UPM to your external system?	
4.	What types of users (Partner, Vendor Team, Agency Users, etc…) will be accessing the Partner Portal via SSO?	
Questions to Answer DURING the SSO Sales Call		
1.	Are you going to be the Service Provider (SP) or Identity Provider (IDP)?	
2.	What Authentication Method would you like to use *(SAML 2.0 or Token-Based)?*	
3.	If ZINFI is going to be the SP, would you like to create a new User record upon each first-time user visit? *(User records get created on the fly every time a NEW user visits for their first login)*	
4.	If answer to Q3 above is “Yes”, then ZINFI will capture/provide the below information by default as attributes. *Please let us know if you need any other information to be captured.*	

	• **First Name** *(Attribute = "firstName")*	
	• **Last Name** *(Attribute = "lastName")*	
	• **Email** *(Attribute = "email"),* unique	
	• **Company** *(Attribute = "company")*	
	• **Country** *(Attribute = "countryISO")*	
	• **User Type** *(Attribute = "userType")*	
5.	If answer to Q3 above is "No", then how will the users be created in the Partner Portal? *Please provide details.*	

6. What will be the various Profile(s), Primary Group(s) and Secondary Group(s) that need to be assigned to each new User record up in first-time visit – based on the type of User that is coming in through SSO?

User Type	Profile	Primary Group	Secondary Group

7.	Is there any other information/data that needs to get pulled in for each User *(besides the attributes listed above in Q4)* via SSO – for reporting needs?	
8.	ZINFI will provide below information for SSO configuration:	
	• IDP or Entity Name	

	• Certificate for signed request	
	• SignOn URL for SP initiated SSO	
9.	ZINFI needs the below information for SSO configuration:	
	• Service Provider (SP) ID or Name	
	• Assertion Consumer Service URL	
	• Partner Certificate for signed SAML response	
Additional Notes/Comments for Use Case Capturing		
	<insert notes here>	

