

# SafeNet Authentication Service Integration Guide

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Protecting SugarCRM with SAS



THE  
DATA  
PROTECTION  
COMPANY

## Document Information

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|-----------------------------|-----------------------|
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# Introduction

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## Third-Party Software Acknowledgement

This document is intended to help users of SafeNet products when working with third-party software, such as SugarCRM.

Material from third-party software is being used solely for the purpose of making instructions clear. Screen images and content obtained from third-party software will be acknowledged as such.

## Overview

The goal of this document is to provide guidance for setting up and managing the SafeNet Authentication Service (SAS) authentication solution in a SugarCRM environment.

## Applicability

The information in this document applies to SafeNet Authentication Service – Private Cloud Edition (SAS-PCE)

## Environment

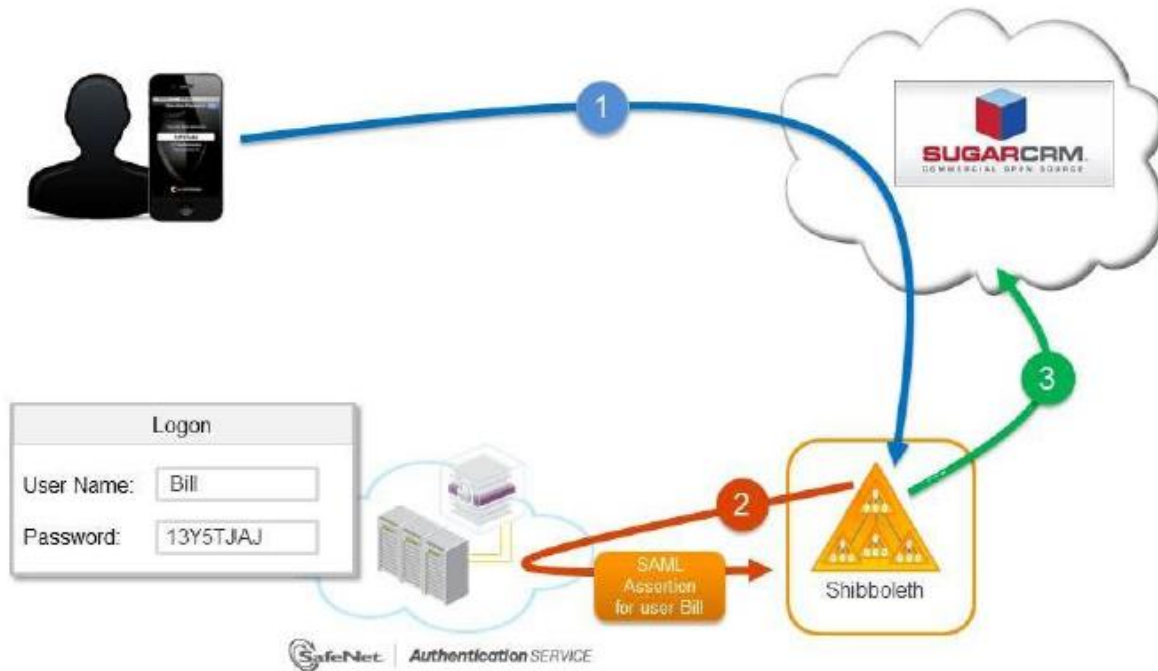
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| Environment                                   | Configuration  |
|---|--|
| <b>SugarCRM</b>                               | SugarCRM Professional account, or higher                                 |
| <b>SAS v3.3 - Private Cloud Edition (PCE)</b> | SAML (Shibboleth) installed and configured on Windows Server 2008 R2 SP1 |

## Solution Overview

This guide describes the process for enabling SafeNet Authentication Service (SAS) strong authentication with SugarCRM. This document assumes that the SugarCRM environment is already configured and working with 'static' passwords prior to implementing SAS strong authentication. In this document, we configure SugarCRM for Single Sign-On (SSO) using SafeNet Authentication Service for strong authentication.

### SugarCRM SSO with SAS



1. Bill, a user, wants to log on to SugarCRM.
2. Shibboleth collects Bill's credentials and passes them to SafeNet Authentication Service (SAS) for authentication. SAS evaluates Bill's credentials, and returns an "accept" or "reject" response to Shibboleth.
3. Shibboleth uses the SAS response to return an "accept" or "error" assertion to SugarCRM.

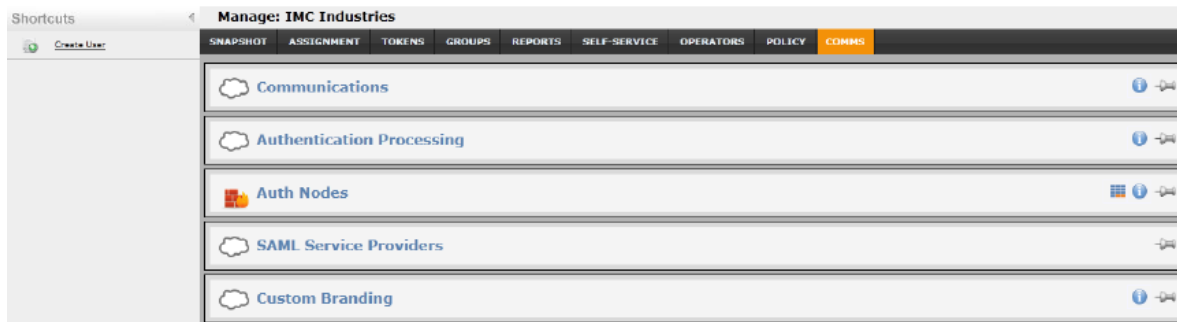
# Identity Provider Configuration

## Viewing SAS's SAML Settings

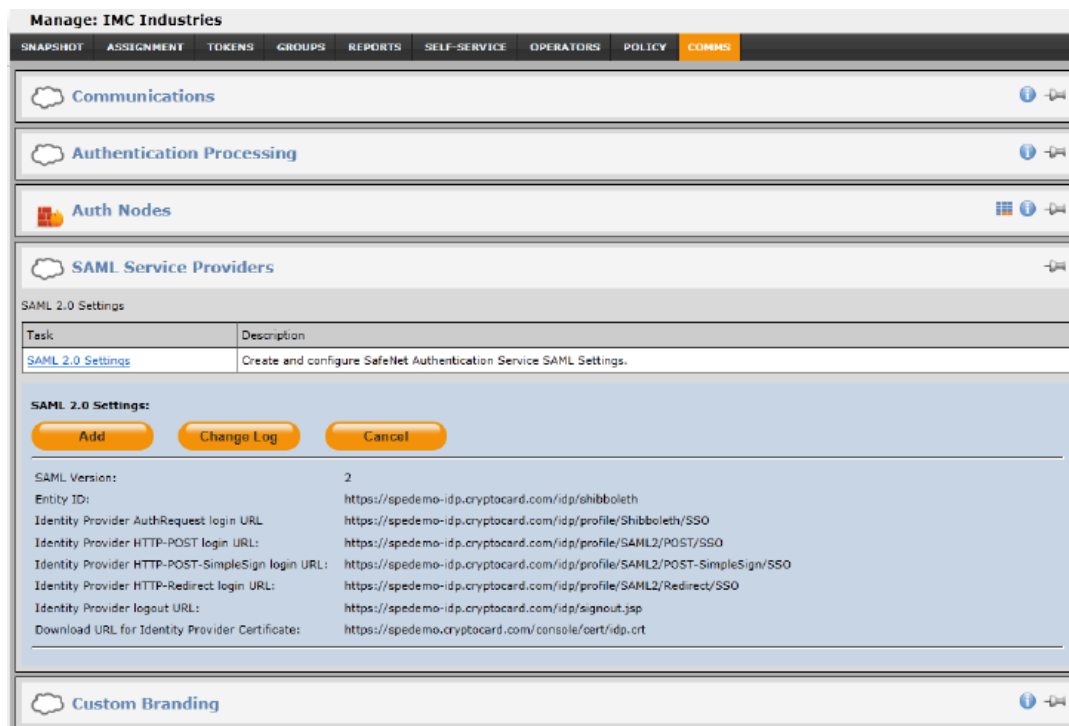
Display the SAS data that will be needed for SugarCRM configuration in “Adding SAS as an Identity Provider in SugarCRM” on page 7.

To access the SAS SAML settings required for SugarCRM configuration:

1. In your SAS console, select the **Virtual Server > COMMS** tab.



2. In the **SAML Service Providers** area, click **SAML 2.0 Settings**.
3. The **SAML 2.0 Settings** are displayed. The following is an example of the settings:



4. Download and open the Identity Provider certificate whose link appears as **Download URL for Identity Provider Certificate**.

## Adding SAS as an Identity Provider in SugarCRM

Use the SAS SAML settings to configure SugarCRM. See Viewing SAS's SAML Settings on page 7 to view the SAS settings.

To add SAS as an Identity Provider in SugarCRM:

1. Log in to SugarCRM.
2. In the upper right corner, click **Administrator > Admin**.
3. On the **Administration** window, select **Users > Password Management**.

The screenshot shows the 'Password Management' configuration window in SugarCRM. The window has a dark blue header with navigation tabs: Accounts, Contacts, Opportunities, Leads, Calendar, Administration, and More. A search bar and user profile (Administrator) are on the right. The main content area is titled 'Password Management' and contains several sections:

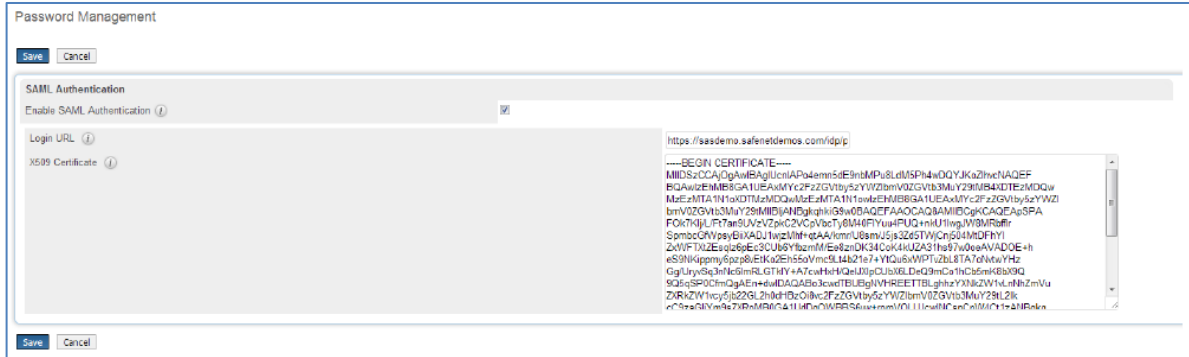
- Password Requirements:** Fields for Maximum Length (6), Must contain one upper case letter (A-Z) (checked), Must contain one number (0-9) (checked), and a list of special characters.
- System-Generated Passwords:** Enable System-Generated Passwords Feature (checked), System-Generated Password Expiration (None), Password Expires in (7) Days, Password Expires upon (logins).
- User Reset Password:** Enable Forget Password feature (checked), Generated Link Expiration (None), Link Expires in (24) Hours, Enable reCAPTCHA Validations (unchecked).
- Email Templates:** Email template containing system-generated password (System-generated password email), Email template containing system-generated link to reset password (Forgot Password email).
- User Generated Password Expiration:** Password Expires in (Days), Password Expires upon (logins).
- Login Lockout:** Login Lockout (None), Lockout users after (unsuccessful) login attempts.
- LDAP Support:** Enable LDAP Authentication (unchecked).
- SAML Authentication:** Enable SAML Authentication (unchecked).

Buttons for Save and Cancel are at the bottom left. A Print and Back to top link is at the bottom right.

4. On the **Password Management** window, in the **SAML Authentication** area, select **Enable SAML Authentication**.

This is a close-up of the 'SAML Authentication' section from the previous screenshot. It shows the text 'SAML Authentication' and 'Enable SAML Authentication' with an information icon (i) to its right. The checkbox next to 'Enable SAML Authentication' is checked.

5. On the **SAML Authentication** window, do the following:
  - a. In the **Login URL** field, copy the **Identity Provider HTTP-Redirect login URL** value displayed in the SAS console.
  - b. In the **X509 Certificate** field, copy the contents of the Identity Provider certificate opened in step 3 of “Viewing SAS’s SAML Settings” on page 6.
  - c. The following is an example of the completed fields in the SugarCRM console.



6. Click **Save**.

SAS is now set as an Identity Provider in SugarCRM.



**NOTE:** SAS is now SugarCRM's default authentication method.

To override the default method and log in using a username and password, log in using the following URL:

**Error! Hyperlink reference not valid.**

where <SugarCRM\_instance\_name> is replaced by the name of your SugarCRM instance.

To force the default SAS SAML authentication for a user, in the SugarCRM console go to **Administrator > Admin > User management**, click the username, and in the **Advanced** tab, select **SAML Authenticate**.



# SAML Authentication Configuration in SAS

Before configuring your SugarCRM instance as a SAML Service Provider in SafeNet Authentication Service, ensure that your SAS virtual server is populated with your organization's user accounts.

You can add user accounts to your SAS virtual server in any of the following ways:

- Manually, one user at a time, using the **Create User** shortcut.
- Manually, by importing one or more user records using a flat file.
- Automatically, by synchronizing with your Active Directory/LDAP server using the SAS LDAP Synchronization Agent.

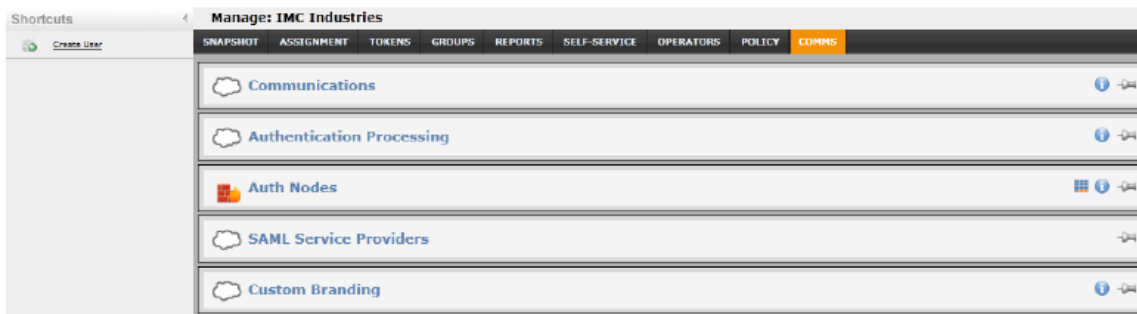
For further information on adding users to your SAS virtual server, refer to SafeNet Authentication Service documentation at the following location: <http://www2.safenet-inc.com/sas/implementation-guides.html>

## Enabling SAML User Authentication

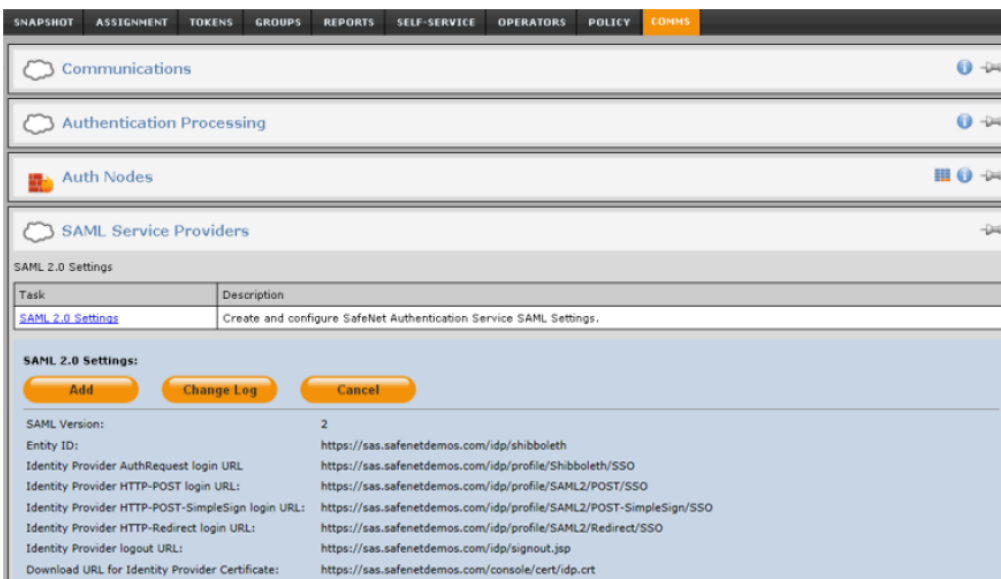
Enable users to authenticate against the SugarCRM service provider.

To enable SAML authentication for SugarCRM for SAS users:

1. In your SAS console, select the **Virtual Server > COMMS** tab.



2. In the **SAML Service Providers** area, click **SAML 2.0 Settings**. The SAML 2.0 Settings are displayed as shown in the example below.



3. Click **Add** to add a new service provider. The **Add SAML 2.0 Settings** fields are displayed.

**Add SAML 2.0 Setting:**

Apply Cancel

Friendly Name:

SAML 2.0 Metadata:  Upload Existing Metadata File  Create New Metadata File  
Choose File No file chosen

Entity ID:

Custom Logo: Choose File No file chosen

Custom CSS: Choose File No file chosen

Custom Button Image: Choose File No file chosen

Custom Page Title:

Custom Icon: Choose File No file chosen

Custom Login Header Text:

Custom Login Button Text:

Login Message:

Custom Username Text:

Custom Password Text:

4. In the **Friendly Name** field, enter a name for the SugarCRM service provider.
5. Select **Create New Metadata File**. Two more settings are displayed. Do the following:
  - a. In the **Entity ID** field, enter **php-saml**.
  - b. In the **Location** field, enter the following:  
`https://<SugarCRM_instance_name>.sugarondemand.com/index.php?module=Users&action=Authenticate`  
where `<SugarCRM_instance_name>` is replaced by the name of your SugarCRM instance. This field is the SugarCRM login URL.
  - c. Click **Apply**.SugarCRM is added as a SAML service provider.

**Add SAML 2.0 Setting:**

Apply Cancel

Friendly Name:

SAML 2.0 Metadata:  Upload Existing Metadata File  Create New Metadata File  
Entity ID:   
Location:

Entity ID:

Custom Logo:  Browse...

Custom CSS:  Browse...

Custom Button Image:  Browse...

Custom Page Title:

Custom Icon:  Browse...

Custom Login Header Text:

Custom Login Button Text:

Login Message:

Custom Username Text:

Custom Password Text:

Custom Branding



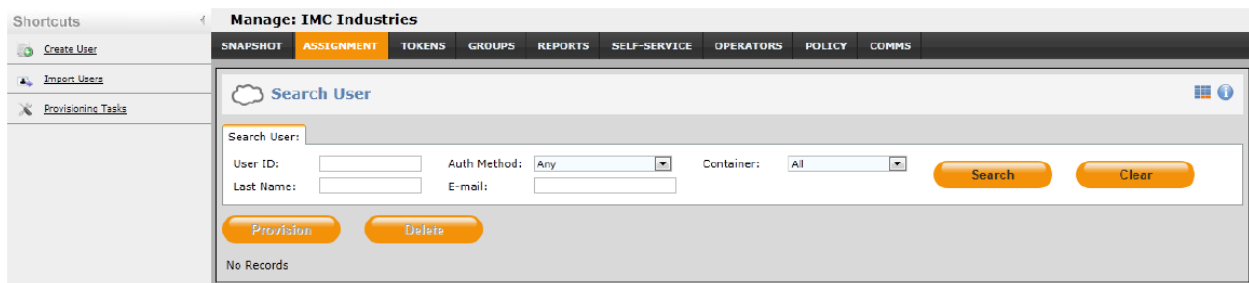
**NOTE:** The following steps associate an individual user with the SAML service provider.

Instead of performing this process manually per user as described below, you can use a SAML provisioning rule to automatically associate a group of users to the SAML service provider.

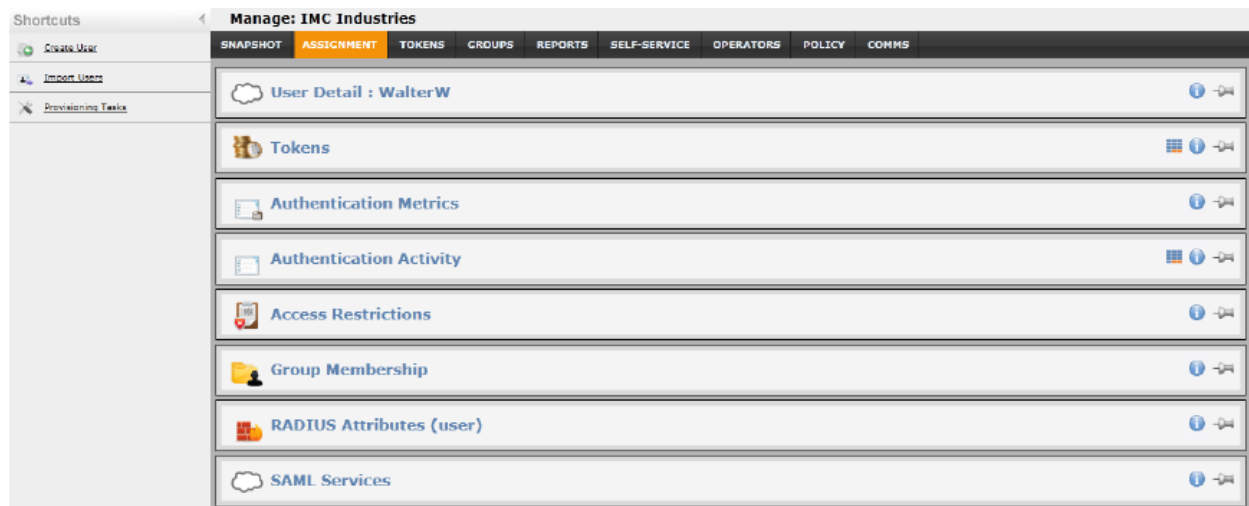
For more information on using SAML provisioning rules, see the SAS Administration Guide. SafeNet Authentication Service documentation can be found at the following location:

<http://www2.safenet-inc.com/sas/implementation-guides.html>

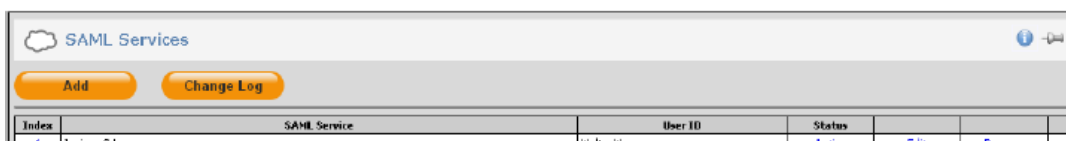
6. Select the **Virtual Server > ASSIGNMENT** tab.



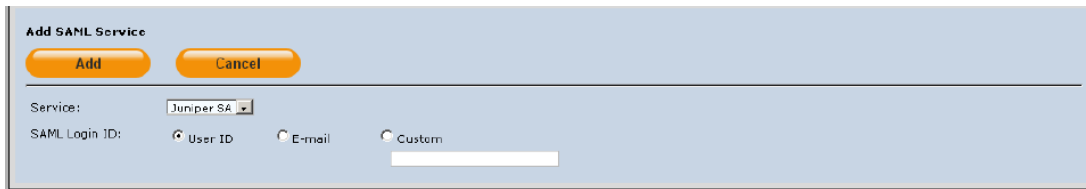
7. Search for the user for whom to enable SAML authentication to SugarCRM and click its User ID. The **User Details** window opens.



8. Select **SAML Services**. The **SAML Services** window is displayed.



- Click **Add**. More options are displayed.



- From the **Service** list of configured SAML service providers, select the SugarCRM service provider's **Friendly Name** created previously.
- For **SAML Login ID**, select **E-mail**.
- Click **Add**. The new service provider's name is displayed as the user's SAML service provider.

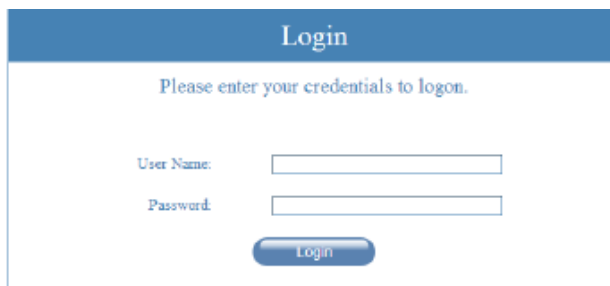
## Running the Solution

User logon to SugarCRM uses SAML authentication with SafeNet Authentication Service.

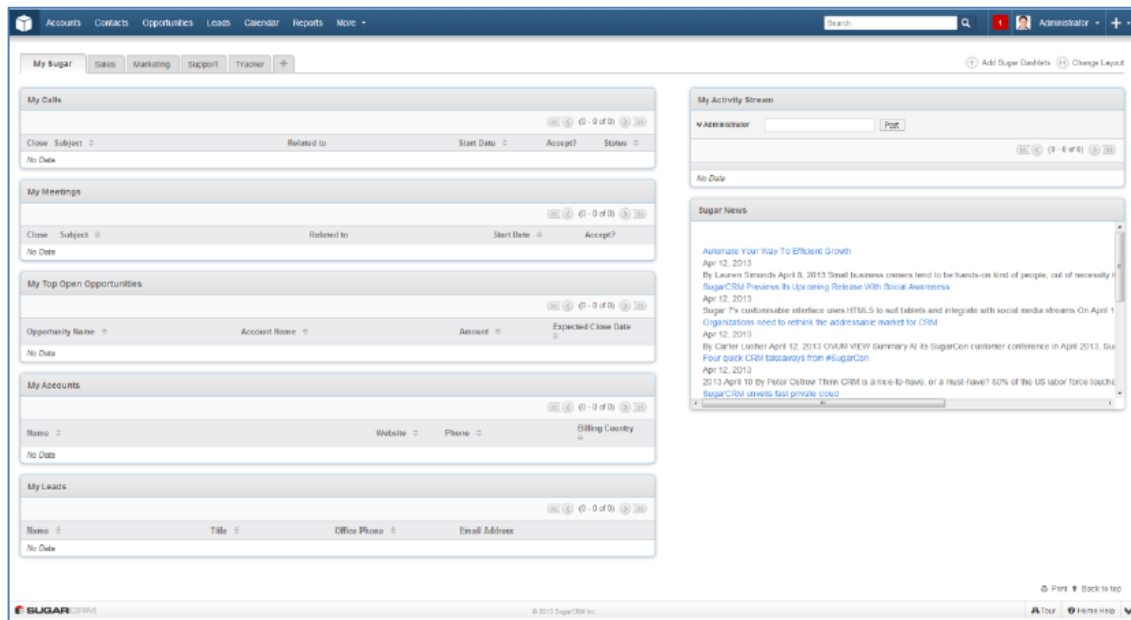
To log on to your SugarCRM environment:

- Browse to [https://<SugarCRM\\_instance\\_name>.sugarondemand.com](https://<SugarCRM_instance_name>.sugarondemand.com), where <SugarCRM\_instance\_name> is replaced by the name of your SugarCRM instance.

You are redirected to the SAS Login page.



- Enter your SAS credentials, and then click **Login**. You are logged on to your SugarCRM account.



## Support Contacts

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If you encounter a problem while installing, registering, or operating this product, please make sure that you have read the documentation. If you cannot resolve the issue, contact your supplier or SafeNet Customer Support. SafeNet Customer Support operates 24 hours a day, 7 days a week. Your level of access to this service is governed by the support plan arrangements made between SafeNet and your organization. Please consult this support plan for further information about your entitlements, including the hours when phone support is available to you.

| Contact Method                           | Contact Information   |                |
|--|---|----------------|
| <b>Address</b>                           | SafeNet, Inc.<br>4690 Millennium Drive<br>Belcamp, Maryland 21017 USA   |                |
| <b>Phone</b>                             | United States   | 1-800-545-6608 |
|  | International   | 1-410-931-7520 |
| <b>Technical Support Customer Portal</b> | <a href="https://serviceportal.safenet-inc.com">https://serviceportal.safenet-inc.com</a><br>Existing customers with a Technical Support Customer Portal account can log in to manage incidents, get the latest software upgrades, and access the SafeNet Knowledge Base. |                |