Configuring Single Sign-on from the VMware Identity Manager Service to Expensify

VMware Identity Manager

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Overview

This document provides information about configuring SAML-based single sign-on from the VMware Identity Manager service to Expensify.

Expensify is an expense report service that streamlines the process of handling expenses with features to import expenses, scan receipts, and generate expense reports.

When Expensify is configured in the VMware Identity Manager catalog, users can sign in to Expensify from their My Apps portal or if they sign in to their Expensify account directly, they are redirected to the VMware Identity Manager sign in page to enter their sign-in credentials

You must have an administrator account for the VMware Identity Manager service, as well as an administrator account for Expensify.

Adding Expensify to VMware Identity Manager Catalog

To enable single sign-on to Expensify on the service, you must configure the app in the catalog and add the identity provider SAML metadata URL to Expensify.

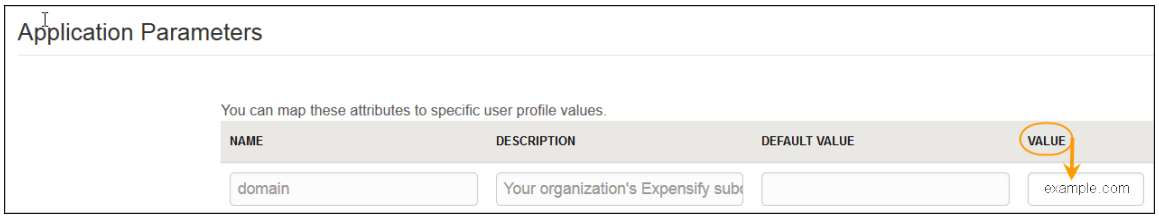
Add Expensify to the Catalog

1. Log in to the VMware Identity Manager administration console.
2. In the **Catalog** page, click **Add Application > ...from the cloud application catalog**.
3. Click the **Expensify** icon
4. Click **Configuration**. The Configuration page is preconfigured as follows.

FIELD	CONFIGURED VALUE
Launch URL	Automatically populated with your launch URL.
RelayState	
Proxy Count	
Login Redirection URL	
Include Destination	Enabled
Sign Response	Enabled
Sign Assertion	
Include Cert	
Allow API Access	

Configure Via	
Assertion Consumer Service*	Populated with the URL the SAML should be posted to. **https://www.expensify.com/authentication/saml/loginCallback?domain={domain}**
Name ID Format	**Email address**
Name ID Value • **Select from suggestions** • **Custom value**	Custom value field populated with **${user.email}**
Recipient Name*	The SP's assertion consumer service URL populated as **https://www.expensify.com/authentication/saml/loginCallback?domain={domain}**
Audience*	The SP's unique identified populated with **https://www.expensify.com**
Assertion Lifetime	Populated with a value of **200** seconds
Signing Certificate	
Application Parameters	Must be configured. See step 5.
Attribute Mapping	

5. In the **Applications Parameter** section, in the **Value** column enter your company domain name.

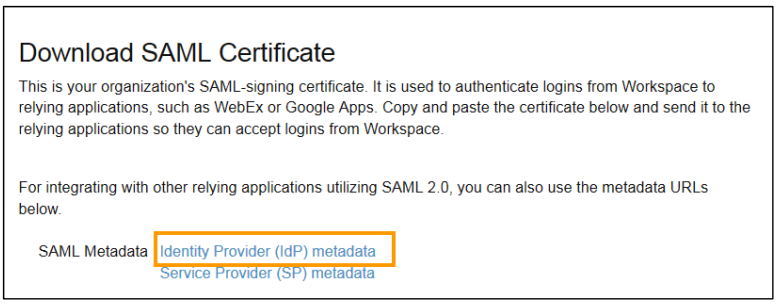


6. Click **Save**.

Locate Identity Provider SAML Metadata

You must have the VMware Identity Provider identity provider metadata xml URL to configure Expensify.

1. In the Catalog > Settings tab, click **SAML Metadata**.
2. In the SAML Metadata section, right-click **Identity Provider (IdP) metadata** and safe the **idp.xml** file.



You upload this file in the Expensify administration console.

Setting up Expensify

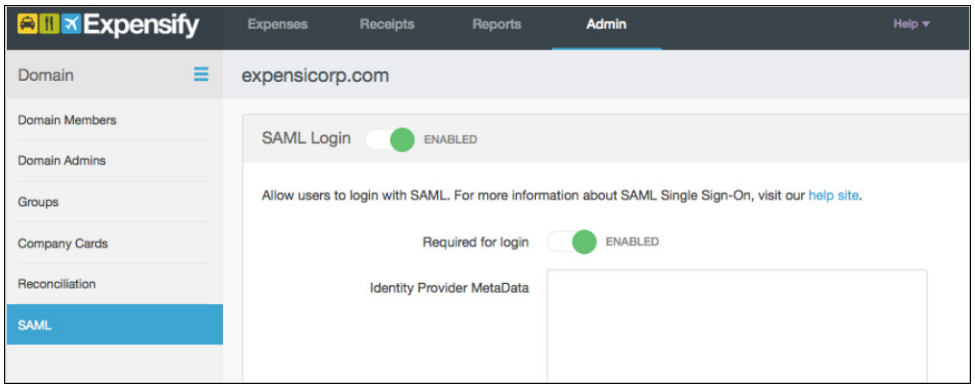
To set up Expensify for single sign-on from the service, you set up single sign-on in the Expensify admin pages and upload the VMware Identity Manager SAML signing certificate.

Configure Expensify for Single Sign on

To enable SAML single sign-on in Expensify, you must have Domain Control enabled in Expensify and your domain verified.

1. Log in to Expensify as administrator and navigate to Admin > Domain Control > [domainname] > SAML.
2. Enable **SAML Login**.
3. To require SSO, enable **Required for login**.

   Users are required to sign in with their single sign-in credentials. Their Expensify passcodes do not work.
4. Open the Identity Provider SAML Metadata URL you saved earlier and copy and paste the text in to the **Identity Provider MetaData** text box.



Testing Single Sign-on Configuration

Test your single sign-on configuration with a small number of users before deploying the application across your organization.

Set up User in VMware Identity Manager for Testing

1. Log in to the VMware Identity Manager administration console.
2. In the **Users & Groups** page, click **Users** and ensure that the user you are testing is in the list of users.
3. In the **Catalog** page, click on the **Expensify** application.
4. Click **Entitlements**.
5. Click +**Add user entitlement**.
6. Select the test user and change the **DEPLOYMENT** field value for the user to **Automatic**. For example:

7. Click **Save**, then click **Done**.
8. In the top-right corner of the page, click your user name and select **Logout**.

Set up User in Expensify for Testing

1. Sign in to Expensify as the administrator and navigate to the **Domain > Domain Members** page.
2. On the Members page, click Invite members.
3. Enter the email addresses of the test users you want to invite.

Next, verify that the test user can sign in to the My Apps portal.

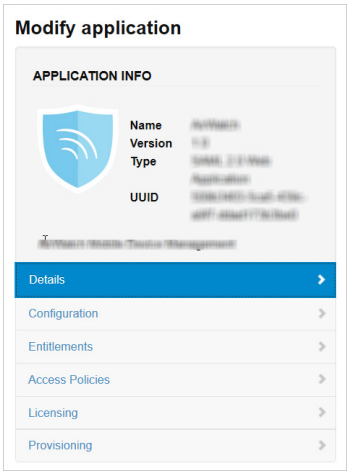
Verify Test-User can Sign in to Expensify

1. Sign in to the user portal as the test user.
2. Click the **Expensify** icon on the My Apps page.

   You should now have single sign-on access to Expensify.

Completing the Configuration in the Catalog

In addition to configuring the Web application for single sign-on to the service, you can configure additional settings to add an access policy, set up app licensing requirements, and entitle users and groups to the app.



Entitlements After you configure a Web application, you can add group entitlements and entitle individual users to the Web app.

Access Policies The VMware Identity Manager service includes a default policy that is automatically assigned to the Web app when you add the app to the Catalog. If you do not want to use the default access policy, create a new access policy and in the Access Policies

link, select the access policy to use for this Web application.

For example, you can create a stricter policy than the default, with rules that specify which IP addresses have access to the application, using which authentication methods, and for how long until reauthentication is required. See the VMware Identity Manager documentation at http://pubs.vmware.com.

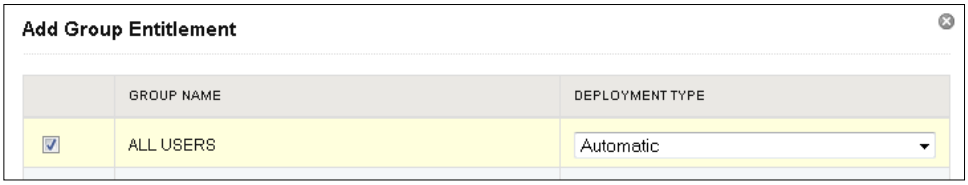
Licensing Licensing can be used to require users to request license approval before they can access the application. You can add additional information, including pricing, license type, cost per license and the number of licenses. You can run the Resource Usage report to see the licensing information for the application.

Provisioning Provisioning provides automatic application user-management from a single location. Provisioning adapters allow the Web application to retrieve specific information from VMware Identity Manager, as required. The provisioning adapters that can be selected are either Google Apps, Mozy, or Vchs. If you configure these applications, you can select the appropriate provisioning adapter.

Entitle Users to Expensify

You can activate single sign-on for all users. Before you do so, ensure that all the user accounts are provisioned in Expensify.

1. Log in to the VMware Identity Manager administration console.
2. In the **Catalog** page, click **Expensify**.
3. In the **Modify application** page, click **Entitlements**.
4. Click +**Add group entitlement**.
5. Select **ALL USERS** and change the **DEPLOYMENT TYPE** field value to **Automatic**.



6. Click **Save,** then click **Done**.

VMware, Inc. 3401 Hillview Avenue Palo Alto CA 94304 USA Tel 877-486-9273 Fax 650-427-5001 www.vmware.com