1. **Instructions**

   Please complete worksheet to define the specific SAML 2.0 specification and binding information necessary to configure your integration with SurePrep for the **SAML 2.0 IdP-Initiated SSO POST** binding.

2. **Service Provider Information -** The Service Provider is the hosted resource that the firm tries to access (e.g., SurePrep). In our scenario, the SP is a part of the PIM that handles the authentication process.

   Service Provider: SurePrep
   SP Application: FileRoom
   SP Contact E-Mail: Support@SUREPREP.com

3. **Mutually Defined configuration Specifications & Settings**

   SAML Specification Standard: SAML 2.0
   Profile Binding Profile: IdP-Initiated SSO: POST

   Attribute Contract—Both parties must agree on the attributes that are used in SSO events between their web applications.

   Response Signing—Asserting and Relying Parties must know if responses are to be signed. The standard specification requires signing for compliance.

   Send Signed Responses: ☒ Yes / ☐ No

   <mark>(Action Item) Please provide the Base 64 certificate file with this form.</mark>

   Response Encryption—Asserting and Relying Parties must know if the data in the SAML responses are to be encrypted. This can include the entire assertion and/or data in the assertion.

   Encrypt Response: ☐ Yes / ☒ No

4. **Identity Provider (IdP) to Service Provider (SP) Connection Information**

   Entity ID - An Entity ID is a globally unique name that helps identify the Identity Provider that issued the assertion. This unique name is used to identify each parties in the SSO process. The Service Provider (i.e., SurePrep) uses it to distinguish a particular Identity Provider from multiple Asserting Parties under one or more security domains. For a SAML 2.0 connection, this is the "Entity ID" your partner configures.

==Please enter Entity IDs (URL or GUID)==:

Service Provider (SP) Entity ID – This is SurePrep endpoint your firm needs to configure at your end (i.e., IdP configuration)

==(Action item)== Prod: https://production.sureprep.com/sso

Identity Mapping - Identity Mapping is the process in which users authenticated by the IdP are associated with user accounts local to the SP, if any.

==Enter Identity Mapping Option:== ☒ Standard   ☐ Pseudonym ☐ Transient

5. **Service Provider (SP) to Identity Provider (IdP) Connection Information**

   Assertion Consumer Service URL (i.e., Reply URL) - the location where the Service Provider receives and consumes assertions. SAML 2.0 defines the Assertion Consumer URL for the POST method.

   ==(Action item) Assertion Consumer URL== - Please configure this at your end. This is where the SurePrep payload will return the results:
   Production: https://production.sureprep.com/sso/saml

   ==SAML Subject== – Select the Identifier used in the SAML subject. This is typically employee ID or Email ID
         ☐ Email ID
         ☐ Employee ID (userid)

   Additional Attributes – List of additional attributes, agreed to by the partners in an identity federation, representing additional information about a user (SAML Subject).

   ==Do you want to send additional attributes?== ☐ Yes / ☐ No

If Yes, enter additional attributes:

Attribute Name	Attribute Description	Value

6. <mark>User access URL</mark>:

Note: For **Azure IDP**, go to **Azure AD** > **Enterprise Application** > *[Your Application Name]* > **Properties**, then copy the **User access URL** link.

7. SurePrep automated user provisioning:

Automated provisioning removes the difficulties and delays caused by manually managing user accounts. SurePrep auto-provisioning utilizes SAML 2.0 on SSO enabled domains to ensure user accounts are created automatically in FileRoom as 'Firm Staff'.

<mark>Do you want SurePrep to auto-provision user?</mark> ☐ Yes / ☐ No

If you selected 'Yes' then provide the following required attributes in payload to successfully auto-provision users:
   a. **FirstName**
   b. **LastName**
   c. **Email**

Optional attributes:
   a. **OfficeLocation**
      • If office location is missing or not found, then no office location will be assigned to the user.
   b. *Provide the attribute to use as a username (optional)*:

- If no username attribute is provided, SurePrep will generate a username using 1st character of First name + Last name (e.g., John Smith will be jsmith)
- If another user already exists with the same username, SurePrep will append _ (underscore) + a number (example, jsmith_1)

System auto-generated information:
- Role – Firm Staff
- Username - If no attribute is provided above.