Tip of the Month: SSO Setup Made Simple

At TimeSolv, we're always looking for ways to make your experience smoother, more secure, and more efficient. This month, we're highlighting an important configuration feature: **SAML Single Sign-On (SSO).**

If your firm is enabling SSO, it's essential to follow the setup instructions exactly as outlined. While we understand the temptation to jump ahead or rearrange steps, SSO configuration depends on a very specific order of operations. Doing things out of sequence can result in access issues that are often tricky (and time-consuming) to resolve.

Let's walk through the process with a few helpful reminders:
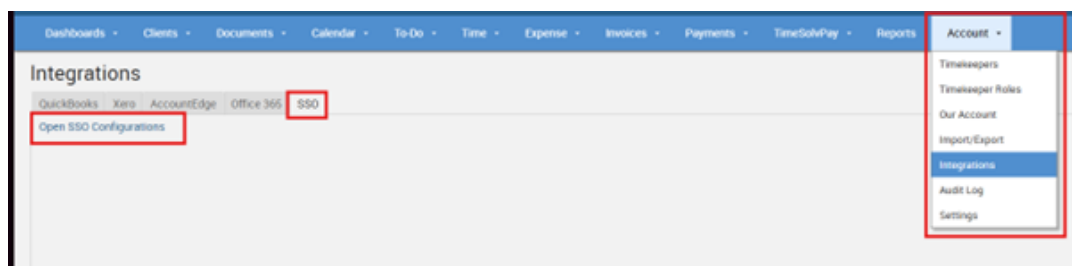
Follow the Steps in Order

SSO setup involves a series of steps that must be completed **in the listed sequence**. Each step builds on the last, and skipping ahead or reordering them can cause misconfigurations.

Here's an overview of the correct flow:

1. **Access the SSO Configurations Page**
   Navigate to Account > Integrations > SSO and click **'Open SSO Configurations'** to begin.

2. **Select Your Identity Provider (IdP) and Export the SP Metadata**
   On the configuration page, choose your IdP and export the **SP metadata XML** file.
3. **Import the SP Metadata into Your IdP**
   This is where you'll configure the claims.
   Important: Be sure to include a **'Name ID'** claim. TimeSolv uses this field to uniquely identify each user.
   - If your firm uses email addresses as usernames in TimeSolv, then the 'Name ID' should reflect that email address.

4. **Set the Response URL Correctly**: Your IdP must return users to:
   https://apps.timesolv.com/IdP/SSO.aspx
5. **Configure the 'IdP Server Settings'**
   Download the IdP metadata XML file and import it into TimeSolv using the **'Import from IdP/federation metadata XML'** button.
6. **Finalize with the 'SP Connector Internal Settings'**
   Click **'Show advanced options'** and note your firm's **Default Login URL**.
   This will be used in your application to authenticate users via your IdP.

A Note About MFA

TimeSolv currently does not support multi-factor authentication (MFA) via SSO. If your firm requires MFA at the IdP level, it will be bypassed once SSO is enabled.

We know technical setups like this can feel daunting. The good news is that SSO setup is straightforward if each step is followed precisely in order. If any part of the process is skipped, changed, or done out of sequence, it can prevent users from logging in successfully.

To ensure a smooth experience for your firm, please review each instruction carefully before proceeding to the next. And of course, if you need any guidance, our support team is always here to assist.