



# AD FS 2.0 Step-by-Step Guide: Federation with Shibboleth 2 and the InCommon Federation

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## Abstract

Through its support for the WS-Federation and Security Assertion Markup Language (SAML) 2.0 protocols, Microsoft® Active Directory® Federation Services 2.0 (AD FS 2.0) provides claims-based, cross-domain, Web single sign-on (SSO) interoperability with non-Microsoft federation solutions. Shibboleth® 2, through its support for SAML 2.0, enables cross-domain, federated SSO between environments that are running Microsoft and Shibboleth 2 federation infrastructures.

Building on existing documentation, this step-by-step guide walks you through the setup of a basic lab deployment of AD FS 2.0 and Shibboleth 2 that performs cross-product, browser-based identity federation. Both products perform both identity federation roles: claims provider/identity provider and relying party/service provider. In addition, this guide provides details about the steps that are necessary for interoperability between AD FS 2.0 and the InCommon Federation, in which Shibboleth software is widely used. We expect that interoperability with other federations in the Research and Education sector would be achieved similarly.

This document is intended for developers and system architects who are interested in understanding the basic modes of interoperability between AD FS 2.0 and Shibboleth 2.

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# AD FS 2.0 Step-by-Step Guide: Federation with Shibboleth 2 and the InCommon Federation

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## About This Guide

This guide provides step-by-step instructions for configuring a basic identity federation deployment between Microsoft® Active Directory® Federation Services 2.0 (AD FS 2.0) and Shibboleth 2 (Shibboleth) by using the [Security Assertion Markup Language \(SAML\) 2.0](#) protocol (<http://go.microsoft.com/fwlink/?LinkId=193996>) with the SAML2.0 HTTP POST binding. In [Appendix A](#), this basic deployment is modified to demonstrate interoperability between AD FS 2.0 and a Shibboleth instance that is participating in the InCommon Federation.

## Terminology Used in This Guide

Throughout this document, there are numerous references to federation concepts that are called by different names in the Microsoft and Shibboleth products. The following table assists in drawing parallels between the two vendors' technologies.

AD FS 2.0 name	Shibboleth name	Concept
Security token	Assertion	An XML document that is created and sent during a federated access request that describes a user
Claims provider	Identity provider (IdP)	A partner in a federation that creates security tokens for users
Relying party	Service provider (SP)	A partner in a federation that consumes security tokens to provide access to applications
Claims	Assertion attributes	Data about users that is sent inside security tokens

In this deployment, each product performs both the claims provider/identity provider role and the relying party/service provider role.

## About the Author

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# Prerequisites and Requirements

This lab assumes the pre-existence of deployments of AD FS 2.0 and Shibboleth as described in the following sections.

## AD FS 2.0

The test deployment that is created in the [AD FS 2.0 Federation with a WIF Application Step-by-Step Guide](http://go.microsoft.com/fwlink/?LinkId=193997) (<http://go.microsoft.com/fwlink/?LinkId=193997>) is used as starting point for this lab. That lab uses a single Windows Server® 2008 R2 instance (fsweb.contoso.com) to host both the AD FS 2.0 federation server and a Windows Identity Foundation (WIF) sample application. It assumes the availability of a “Contoso.com” domain in which fsweb.contoso.com is a member server. The same computer can act as the domain controller and the federation server in test deployments.

## Shibboleth

The Shibboleth environment in this lab is hosted by a fictitious company called A. Datum Corporation. Both the IdP and SP software components can be run on the same host computer.

This guide assumes that the environment was deployed as follows, in anticipation of the configuration steps described later. Installation and deployment guides for Shibboleth are available at the [Shibboleth 2 documentation home page](http://go.microsoft.com/fwlink/?LinkId=204014) Web site (<http://go.microsoft.com/fwlink/?LinkId=204014>).

## Windows

- Host operating system: Windows Server 2008 R2
- Active Directory Domain Services (AD DS) server role installed to provide the Shibboleth user identity repository:
  - Domain name: adatum.com
  - Host name: shib.adatum.com



### Note

A domain controller is an optional component for this lab. Another Lightweight Directory Access Protocol (LDAP) directory can be used in this lab without affecting the results.

- Web Server role (Internet Information Services (IIS)) installed to host the Shibboleth-protected sample application, as well as the preformatted hyperlinks that initiate federated access
  - Application Development role services installed
  - IIS 6 Management Compatibility role services installed
  - Default website ports: HTTP (80) and HTTPS (443)

## Shibboleth

- Prerequisite for IdP: Java 5 or above. This lab used [JRE version 6u21 for 32-bit Windows](http://go.microsoft.com/fwlink/?LinkId=204015) (http://go.microsoft.com/fwlink/?LinkId=204015).

 **Note**

Set the JAVA\_HOME environment variable to the install directory for this JRE (for example, C:\Program Files (x86)\Java\jre6) before running the Shibboleth IdP installer.

- Latest Shibboleth IdP software, at [Index of /downloads/shibboleth/idp/latest](http://go.microsoft.com/fwlink/?LinkId=204016) (http://go.microsoft.com/fwlink/?LinkId=204016). This lab used version 2.2.0.

 **Note**

This installer automatically installs and configures Apache Tomcat 6.0.26 for 32-bit Windows. It depends on an existing 32-bit Java JRE installation (below).

 **Note**

On the **IdP Details** setup screen, use the values in the following table.

Name	Value
DNS Name	shib.adatum.com
Browser facing port	444

- Latest Shibboleth SP software for IIS 7 on 64-bit Windows, at the [Shibboleth downloads page](http://go.microsoft.com/fwlink/?LinkId=204017) (http://go.microsoft.com/fwlink/?LinkId=204017). This lab used version 2.3.1. Accept all the default values during the installation.

## Step 1: Preconfiguration Tasks

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In this step, perform the prerequisite configuration steps to prepare the environment for testing AD FS 2.0 as IdP/Shibboleth as SP (steps 2, 3) and/or Shibboleth as IdP/AD FS 2.0 as SP (steps 4, 5).

 **Note**

All of the actions in this section were performed while logged into Windows with administrative privileges.

## Ensure IP Connectivity

Make sure that the Shibboleth (shib.adatum.com) and AD FS 2.0 (fsweb.contoso.com) computers have IP connectivity between them. The Contoso.com domain controller, if it is running on a separate computer, does not require IP connectivity to the Shibboleth system.

# Configure Name Resolution

In this lab, we will use the hosts file on both computers to configure name resolution of the partner federation servers and sample applications.



## Note

Production deployments should use Domain Name System (DNS) instead.



## To configure name resolution

- 1) Locate the hosts file on the Shibboleth computer (shib.adatum.com). The default location is C:\windows\system32\drivers\etc\hosts.
- 2) Right-click the file, and then click **Open**. Select Notepad to open the file.
- 3) Add an entry for fsweb.contoso.com, for example:  
192.168.1.2 fsweb.contoso.com
- 4) If shib.adatum.com is not a Windows domain controller, add a second entry that points to itself in the hosts file, for example:  
192.168.1.3 shib.adatum.com
- 5) Save and close the file.
- 6) Locate the hosts file on the AD FS 2.0 computer (fsweb.contoso.com), and open it with Notepad.
- 7) Add an entry for shib.adatum.com, for example:  
192.168.1.3 shib.adatum.com
- 8) Save and close the file.

# Verify Clock Synchronization

Federation events typically have a short Time to Live (TTL). To avoid errors based on time-outs, ensure that both computers have their clocks synchronized.



## Note

For information about how to synchronize a Windows Server 2008 R2 domain controller to an Internet time server, see [article 816042](http://go.microsoft.com/fwlink/?LinkID=60402) in the Microsoft Knowledge Base (http://go.microsoft.com/fwlink/?LinkID=60402).

# Enable SSL Server Authentication

Federation relies heavily on public key infrastructure (PKI), including Secure Sockets Layer (SSL) encryption, for trustworthy transactions. To properly use SSL security in this lab, you will perform the following prerequisite steps:

- Create a new, self-signed certificate for the Shibboleth SP (IIS) server at shib.adatum.com. (Note: the Shibboleth IdP Tomcat instance auto-generates an SSL certificate during setup.)

- Add the self-signed certificates being used by IIS and Tomcat at shib.adatum.com into the Trusted Roots store of the AD FS 2.0 computer (fswb.contoso.com).

## Create and Apply a Self-Signed SSL Certificate for the Shibboleth SP (IIS)

This certificate enables SSL communication (as required by AD FS 2.0) with the Shibboleth SP software, running on IIS on shib.adatum.com.

### ▶ To generate and apply a new, self-signed SSL certificate for the Shibboleth SP

- 1) Click **Start**, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**.
- 2) In the left pane, click the icon with the computer name (SHIB). Then, in the **IIS** section of the center pane, double-click **Server Certificates**.
- 3) In the right pane, under **Actions**, click **Create Self-Signed Certificate**.
- 4) In the **Specify Friendly Name** window, type **iis\_ssl**, and then click **OK**.
- 5) In the left pane, in the **Sites** folder, right-click **Default Web Site**, and then click **Edit Bindings**.
- 6) In the **Site Bindings** window, click **Add**.
- 7) In the **Add Site Binding** window, in the **Type** box, select **HTTPS**, and in the SSL certificate box, select **iis\_ssl**. Click **OK**, and then click **Close**.

## Install Shibboleth SSL Certificates on the AD FS 2.0 Computer

Install the Shibboleth IdP and SP SSL certificates into the Trusted Roots store on fswb.contoso.com. This makes it possible for Internet Explorer to trust these web servers during HTTPS communications.

### ▶ To install Shibboleth SSL certificates on fswb.contoso.com

- 1) From fswb.contoso.com, use Internet Explorer to go to <https://shib.adatum.com>.
- 2) At the security warning, click the link to continue to the website. The Address Bar turns red to signify that the page is protected by an SSL certificate that is not trusted.
- 3) Click the **Certificate Error** message next to the Internet Explorer address bar, and then click **View certificates**.
- 4) In the **Certificate** window, on the **General** tab, click **Install Certificate** to start the Certificate Import Wizard.
- 5) Click **Next**.
- 6) In the **Certificate Store** window, click **Place all certificates in the following store**.
- 7) Click **Browse**, and then click **Show physical stores**.
- 8) In the **Trusted Root Certificate Authorities** folder, select **Local Computer**, and then click **OK**.

- 9) Click **Next**, click **Finish**, click **OK**, and then click **OK**.
- 10) Use Internet Explorer to go to <https://shib.adatum.com:444>. (Note the port number.) Use the previous process to install this SSL certificate into the local computer's Trusted Roots store.
- 11) Close and then reopen Internet Explorer, and revisit both web addresses. In both cases, the address bar should remain white, signifying working SSL channels.

## Create a Shibboleth Sample User

Follow the steps in this procedure to add Alan Shen, an Adatum/Shibboleth user to Active Directory for A. Datum.

### To add Alan Shen to Active Directory on shib.adatum.com

- 1) Log in to the Shibboleth computer (shib.adatum.com) with domain administrator credentials.
- 2) Click **Start**, click **Administrative Tools**, and then click **Active Directory Users and Computers**.
- 3) In the console tree, under **adatum.com**, right-click the **Users** folder. Click **New**, and then click **User**.
- 4) On the **New Object – User** page, type the following values, and then click **Next**.

Name	Value
First name	Alan
Last name	Shen
Full name	Alan Shen
User logon name	alansh

- 5) Provide a password, clear the **User must change password at next logon** check box, and then click **Next**.
- 6) Click **Finish**.
- 7) In the right pane of Active Directory Users and Computers, right-click the new user object, and then click **Properties**.
- 8) On the **General** tab, in the **E-mail** box, type the following value, and then click **OK**.

Name	Value
E-mail	alansh@adatum.com

# Create a Shibboleth Sample Application

The Shibboleth SP is automatically configured to protect a folder called “secure” under the Default Web Site. Complete the following procedure to create this “secure” folder and place a sample application in it for demonstrating federated access and claims processing. This application simply lists all server variables, including Shibboleth attributes, that are present when the page is accessed.

## ► To create a Shibboleth sample application

- 1) On the Shibboleth computer (shib.adatum.com), use Windows Explorer to navigate to C:\inetpub\wwwroot.
- 2) Right-click the folder, click **New**, and then click **Folder** to create a new folder. Change the name of the folder to **secure**.
- 3) Click **Start**, click **All Programs**, click **Accessories**, and then click **Notepad** to start Notepad.
- 4) Copy and paste the following into Notepad:

```
<%@ Page Language="C#" %>
<html>
<head>
    <title>Shibboleth Echo Page</title>
</head>
<body>
    You are logged in using Shibboleth!
    <hr />
    <table>
        <%
foreach( string key in Request.Headers )
{
    %>
    <tr>
        <td>
            <%= key %>
        </td>
        <td>
            <%= Request.Headers[ key ] %>
        </td>
    </tr>
    <%
}
    %>
</table>
<hr />
```

```
</body>
</html>
```

- 5) In Notepad, on the **File** menu, click **Save**.
- 6) In the **Save As** window, navigate to the C:\inetpub\wwwroot\secure folder that you created earlier.
- 7) In the **Save as type** drop-down box, select **All Files (\*.\*)**, and in the **File name** box, type **default.aspx**.
- 8) Click **Save**, and then close default.aspx.

## Complete Shibboleth SP Configuration

After it is installed, the Shibboleth SP requires additional configuration before it is ready for use. That configuration is performed in the shibboleth2.xml file, which is in the Shibboleth SP folder.

### ▶ To complete Shibboleth SP configuration

- 1) From the Shibboleth computer (shib.adatum.com), use Windows Explorer to navigate to the folder where the shibboleth2.xml configuration file is located. In this lab, the location is C:\opt\shibboleth-sp\etc\shibboleth.
- 2) Right-click the shibboleth2.xml file, and then click **Edit**. The document should open in Notepad.
- 3) In Notepad, on the **Edit** menu, click **Replace**.
- 4) In the **Replace** window, type the following values.

Name	Value
Find what:	sp.example.org
Replace with:	shib.adatum.com

- 5) Click **Replace All**.
- 6) Close the **Replace** window.
- 7) Save the shibboleth2.xml file.
- 8) Click **Start**, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**.
- 9) In the right pane, under **Actions**, click **Restart**.

# Step 2: Configure AD FS 2.0 as the Identity Provider and Shibboleth as the Relying Party

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In this step, you configure the scenario in which the Contoso domain administrator (through AD FS 2.0) gets federated access to the A. Datum sample application (using Shibboleth). The scenario uses the SAML 2.0 POST profile.

## Configure AD FS 2.0

### Add a Relying Party Using Metadata

Adding a partner into AD FS 2.0 using Shibboleth can be done either manually or through metadata import. In this lab, you use metadata import.

#### To add a relying party using metadata

- 1) In AD FS 2.0, in the console tree, right-click the **Relying Party Trusts** folder, and then click **Add Relying Party Trust** to start the Add Relying Party Trust Wizard.
- 2) On the **Select Data Source** page, leave selected **Import data about the relying party published online or on a local network**.
- 3) In the **Federation metadata address** field, type **https://shib.adatum.com/Shibboleth.sso/Metadata**, and then click **Next**.

#### **Note**

Shibboleth auto-generated metadata is designed primarily for testing scenarios (like this lab). It can be inadequate for production deployments.

- 4) Click **OK** to acknowledge the message “Some of the content in the federation metadata was skipped because it is not supported by AD FS 2.0.”
- 5) In the **Specify Display Name** page, leave **shib.adatum.com**, and then click **Next**.
- 6) On the **Choose Issuance Authorization Rules** page, leave the default **Permit all users to access the relying party** selected, and then click **Next**.
- 7) Click **Next**, and then click **Close**.

### Edit Claim Rules for Relying Party Trust

Claim rules describe how AD FS 2.0 determines what data should reside inside the federation security tokens that it generates. The claim rule in this section describes how data from Active Directory is inserted in the security token that is created for Shibboleth.

Shibboleth is preconfigured to assert multiple attributes of the eduPerson object class, which is specially designed for higher education institutions. These are not configured by default in

AD FS 2.0. Also, Shibboleth expects inbound SAML attributes names to use a different name format (urn:oasis:names:tc:SAML:2.0:attrname-format:uri) than AD FS 2.0 publishes by default (urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified). For these reasons, we will use the AD FS 2.0 custom rule language to generate Shibboleth-compliant claims.

We will generate an eduPersonPrincipalName claim, based on the user's UPN, and an eduPersonScopedAffiliation claim, based on domain membership.

▶ **To configure eduPerson claims for sending to a relying party trust**

- 1) The **Edit Claim Rules** dialog box should already be open. If not, In the AD FS 2.0 center pane, under **Relying Party Trusts**, right-click **shib.adatum.com**, and then click **Edit Claim Rules**.
- 2) On the **Issuance Transform Rules** tab, click **Add Rule**.
- 3) On the **Select Rule Template** page, select **Send LDAP Attributes as Claims**, and then click **Next**.
- 4) On the **Configure Rule** page, in the **Claim rule name** box, type **Get Data**.
- 5) In the **Attribute Store** list, select **Active Directory**.
- 6) In the **Mapping of LDAP attributes** section, create the following mappings.

LDAP Attribute	Outgoing Claim Type
User-Principal-Name	UPN
Token-Groups – Unqualified Names	Group

- 7) Click **Finish**.
- 8) On the **Issuance Transform Rules** tab, click **Add Rule**.
- 9) On the **Select Rule Template** page, select **Send Claims Using a Custom Rule** and click **Next**.
- 10) In the **Configure Rule** page, in the **Claim rule name** box, type **Transform UPN to epPN**.
- 11) In the **Custom Rule** window, type or copy and paste the following:

```
c:[Type ==  
"http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn"]  
=> issue(Type = "urn:oid:1.3.6.1.4.1.5923.1.1.1.6", Value =  
c.Value,  
Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimp  
roperties/attributename"] =  
"urn:oasis:names:tc:SAML:2.0:attrname-format:uri");
```

 **Note**

The object-identifier-style uniform resource name (URN) string *urn:oid:1.3.6.1.4.1.5923.1.1.1.6* is the formal SAML 2.0 name for the *eduPersonPrincipalName* attribute—a name that the Shibboleth SP software understands by default.

- 12) Click **Finish**.
- 13) On the **Issuance Transform Rules** tab, click **Add Rule**.
- 14) On the **Select Rule Template** page, select **Send Claims Using a Custom Rule**, and then click **Next**.
- 15) On the **Configure Rule** page, in the **Claim rule name** box, type **Transform Group to epSA**.
- 16) In the **Custom Rule** window, type or copy and paste the following:

```
c:[Type == "http://schemas.xmlsoap.org/claims/Group", Value ==
"Domain Users"]
=> issue(Type = "urn:oid:1.3.6.1.4.1.5923.1.1.1.9", Value =
"member@contoso.com",
Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimp
roperties/attributename"] =
"urn:oasis:names:tc:SAML:2.0:attrname-format:uri");
```

- 17) Click **Finish**, and then click **OK**.

## Add the Scope Element to AD FS 2.0 Metadata

Many important Shibboleth attributes are scoped—they are presented in the format *user@scope*, and the scope portion of the attribute is used as an authorization check during claims processing. The *eduPersonPrincipalName* (epPN) claim configured above is an example—the suffix of the epPN (contoso.com, the suffix of the UPN attribute used to populate the claim) will be used as an authorization variable by the Shibboleth SP software.

A Shibboleth SP that is configured to accept scoped attributes (the default setting) checks incoming scope values against a scope element that is included in the IdP partner's XML metadata document. AD FS 2.0 does not include a scope element in its automatically generated metadata, and there is no way to modify the auto-publishing behavior to include additional content. Therefore, to support the use of scoped attributes in this lab, we will create a manually edited, unsigned metadata file for Contoso.com that includes a scope element. Later, Shibboleth will use this modified file to establish its trust with AD FS 2.0.



### Note

Unsigned metadata documents make the relationship between IdP and SP insecure, and their use is inadvisable in production deployments. Workarounds include the following:

- Using a third-party trust fabric like the InCommon Federation to provide signed metadata.

- Using AD FS 2.0-signed metadata but not using incompatible features, such as scoped attributes.
- Manually signing the edited metadata.
- Sharing unsigned metadata between partners using a secured, out-of-band process (secure e-mail, and so forth).

▶ **To create edited AD FS 2.0 metadata with an added scope element**

- 1) On the AD FS 2.0 computer (fsweb.contoso.com), use Internet Explorer to view <https://fsweb.contoso.com/FederationMetadata/2007-06/FederationMetadata.xml>.
- 2) On the **Page** menu, click **Save As**, and then navigate to the Windows desktop and save the file with the name `editedFedMetadata.xml`. Make sure to change the **Save as type** dropdown box to **All Files (\*.\*)**.
- 3) Use Windows Explorer to navigate to the Windows desktop, right-click **editedFedMetadata.xml**, and then click **Edit**.
- 4) In Notepad, insert the following XML in the first element:

<b>Section before editing</b>	<code>&lt;EntityDescriptor ID="abc123" entityID=http://FSWEB.contoso.com/adfs/services/trust xmlns="urn:oasis:names:tc:SAML:2.0:metadata" &gt;</code>
<b>Section after editing</b>	<code>&lt;EntityDescriptor ID="abc123" entityID="http://FSWEB.contoso.com/adfs/services/trust" xmlns="urn:oasis:names:tc:SAML:2.0:metadata" xmlns:shibmd="urn:mace:shibboleth:metadata:1.0"&gt;</code>

- 5) In Notepad, on the **Edit** menu, click **Find**. In **Find what**, type **IDPSSO**, and then click **Find Next**.
- 6) Insert the following XML in this section:

<b>Section before editing</b>	<code>&lt;IDPSSODescriptor protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol"&gt;&lt;KeyDescriptor use="encryption"&gt;</code>
<b>Section after editing</b>	<code>&lt;IDPSSODescriptor protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol"&gt;&lt;Extensions&gt;&lt;shibmd:Scope regexp="false"&gt;contoso.com&lt;/shibmd:Scope&gt;&lt;/Extensions&gt;&lt;KeyDescriptor use="encryption"&gt;</code>

- 7) Delete the metadata document signature section of the file (bold text below), because we have edited the document, which makes the signature invalid.

<b>Section before editing</b>	<pre>&lt;EntityDescriptor ID="abc123" entityID="http://FSWEB.contoso.com/adfs/services/trust" xmlns="urn:oasis:names:tc:SAML:2.0:metadata" xmlns:shibmd="urn:mace:shibboleth:metadata:1.0"&gt;   &lt;ds:Signature xmlns:ds="http://www.w3.org/2000/09/xmldsig#"&gt;     SIGNATURE DATA   &lt;/ds:Signature&gt; &lt;RoleDescriptor xsi:type=...&gt;</pre>
<b>Section after editing</b>	<pre>&lt;EntityDescriptor ID="abc123" entityID="http://FSWEB.contoso.com/adfs/services/trust" xmlns="urn:oasis:names:tc:SAML:2.0:metadata" xmlns:shibmd="urn:mace:shibboleth:metadata:1.0"&gt; &lt;RoleDescriptor xsi:type=...&gt;</pre>

8) Save and close editedFedMetadata.xml.

## Configure Shibboleth

### Add a New IdP Using Local Metadata

Adding a partner using AD FS 2.0 into Shibboleth is done by referencing the partner's XML metadata document in the Shibboleth configuration. The metadata file can reside locally, or it can be located at a URL. In this lab, we will use a local copy of the editedFedMetadata.xml file that we just created, which can be sent to the partner through email.

#### ▶ To add a new IdP using local metadata

- 1) Copy the editedFedMetadata.xml file, which is located on the desktop of the AD FS 2.0 computer (fsweb.contoso.com), to the desktop of the Shibboleth computer (shib.adatum.com).
- 2) From the Shibboleth computer (shib.adatum.com), use Windows Explorer to navigate to the folder where the shibboleth2.xml configuration file is located. In this lab, the location is C:\opt\shibboleth-sp\etc\shibboleth\.
- 3) Right-click the shibboleth2.xml file, and then click **Edit**. The document should open in Notepad.
- 4) In Notepad, on the **Edit** menu, click **Find**.
- 5) In **Find what**, type MetadataProvider, and then click **Find Next**.
- 6) Insert the following XML in this section. Note the removed comment tags at the top and bottom of the section.

<b>Section before editing</b>	<!-- <MetadataProvider type="XML" file="partner-metadata.xml"/> -->
<b>Section after editing</b>	<MetadataProvider type="XML" file="C:\Users\Administrator\Desktop\editedFedMetadata.xml" "/>

7) Save and close the shibboleth2.xml file.



**Note**

Shibboleth administrators often need to configure inbound attribute management using the attribute-map.xml and attribte-policy.xml files. In contrast, in this lab the default configuration files that are distributed with Shibboleth already satisfy our requirements.

## Create a Link for Initiating Federated Access

Initiating federated access to a Shibboleth-protected application is typically done by accessing the secured application directly. This invokes the Shibboleth SP's <SessionInitiator> settings, which are located in the shibboleth2.xml configuration file. All requests can be redirected to a single IdP, or in a case in which an SP interacts with multiple IdPs, the request can invoke the Shibboleth 2 discovery service, a separate application that uses the SAML 2.0 IdP Discovery protocol.

As an alternative, access to a Shibboleth-protected resource can also be initiated by using a preformatted hyperlink. The hyperlink sends the user directly to the Shibboleth SP, with parameters that identify the IdP, allowing it to properly generate the SAML 2.0 authnRequest without user input. This link can be located either at the account side (for example, on a Contoso employee portal page) or at the resource side (for example, on an unprotected A. Datum site page providing authentication options).

For the sake of simplicity, in this lab we will use a preformatted hyperlink to initiate federated SSO, hosting the link on a web page on the IIS instance running on the Shibboleth computer (shib.adatum.com).

**▶ To create a link for initiating federated access**

- 1) On the Shibboleth computer (shib.adatum.com), open Notepad.
- 2) Add the following to a new document:

```
<p>Welcome to A. Datum!</p>
<p>Test Links - From AD FS 2.0 (IdP) to Shibboleth (SP)</p>
<a
href="https://shib.adatum.com/Shibboleth.sso/Login?target=https://
/shib.adatum.com/secure&entityID=http://fsweb.contoso.com/adfs/se
rvices/trust">Link to Test SP-initiated POST Single Sign-on to
```

Shibboleth from AD FS 2.0

- 3) In Notepad, on the **File** menu, click **Save**.
- 4) In the **Save As** window, navigate to the C:\inetpub\wwwroot folder.
- 5) In the **Save as type** drop-down box, select **All Files (\*.\*)**, and in **File name**, type **index.htm**.
- 6) Click **Save**, and then close index,htm.

## Step 3: Test AD FS 2.0 as the Identity Provider and Shibboleth as the Relying Party

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In this scenario, the Contoso domain administrator accesses the federated sample application at adatum.com.



### Note

For the best results, clear all the cookies in Internet Explorer on the AD FS 2.0 computer (fsweb.contoso.com). To clear the cookies, click **Tools**, click **Internet Options**, click **Delete** under **Browsing History**, and then select cookies for deletion.

### ▶ To access the adatum.com application

- 1) Log in to the console of the fsweb.contoso.com server using the CONTOSO\administrator account.
- 2) Open a browser window and navigate to http://shib.adatum.com.
- 3) Click the link to test SSO to Shibboleth from AD FS 2.0.

At this point, you should see the Shibboleth sample application. Notice the “eppn” and “affiliation” headers—these are the eduPersonPrincipalName and eduPersonScopedAffiliation claims that you configured using the AD FS 2.0 claim rule language.

## Step 4: Configure Shibboleth as the Identity Provider and AD FS 2.0 as the Relying Party

---

In this step, you configure a scenario in which Alan Shen, an A. Datum user, (using Shibboleth) gets federated access to the WIF sample application through AD FS 2.0. As before, this scenario uses the SAML 2.0 POST profile.

# Configure Shibboleth

## Add a New SP Using Remote Metadata

Adding a partner, using AD FS 2.0, into Shibboleth is done by referencing the partner's XML metadata document in Shibboleth configuration. The metadata file can reside locally, or it can be located at a URL.

Unlike the Shibboleth SP, the Shibboleth IdP does not require a scope variable in partner metadata. Therefore, here we'll point Shibboleth to the AD FS 2.0 auto-generated metadata document and configure Shibboleth to verify the metadata document signature. This will require a local copy of the AD FS 2.0 signing certificate public key.

### ▶ To copy the AD FS 2.0 signing public key to a file

- 1) On the AD FS 2.0 computer (fsweb.contoso.com), in the AD FS 2.0 console tree, click the **Certificates** folder.
- 2) In the center pane, right-click the certificate that is listed under **Token-signing**, and then click **View Certificate**.
- 3) In the **Certificate** window, click the **Details** tab, and then click **Copy to File** to start the Certificate Export Wizard.
- 4) Click **Next**.
- 5) On the **Export File Format** page, leave **DER encoded binary X.509** selected, and then click **Next**.
- 6) On the **File to Export** page, click **Browse**, navigate to the Windows desktop, and then type the file name **adfssign** (leaving the type as **.cer**). Click **Save**.
- 7) Click **Next**, click **Finish**, click **OK**, and then click **OK** again.

### ▶ To add a new SP using remote metadata

- 1) Copy the adfssign.cer file, which is located on the desktop of the AD FS 2.0 computer (fsweb.contoso.com), to the credentials folder of the Shibboleth IdP deployment on shib.adatum.com. In this lab, the location is C:\Program Files (x86)\Internet2\Shib2IdP\credentials.
- 2) On the Shibboleth computer, use Windows Explorer to navigate to the folder where the relying-party.xml configuration file is located. In this lab, the location is C:\Program Files (x86)\Internet2\Shib2IdP\conf.
- 3) Right-click the relying-party.xml file, and then click **Edit**. The document should open in Notepad.
- 4) In Notepad, on the **Edit** menu, click **Find**.
- 5) In **Find what**, type **Metadata Configuration**, and then click **Find Next**.
- 6) Add the following MetadataProvider in this section:

<b>Section before editing</b>	<pre>&lt;MetadataProvider id="TestShib" xsi:type="FileBackedHTTPMetadataProvider" xmlns="urn:mace:shibboleth:2.0:metadata" metadataURL="http://www.testshib.org/metadata/testshib-providers.xml" backingFile="C:\Program Files (x86)\Internet2\Shib2Idp/metadata/Downloaded-Metadata.xml" /&gt; &lt;/MetadataProvider&gt;</pre>
<b>Section after editing</b>	<pre>&lt;MetadataProvider id="ADFS2" xsi:type="FileBackedHTTPMetadataProvider" xmlns="urn:mace:shibboleth:2.0:metadata" metadataURL="https://fsweb.contoso.com/FederationMetadata/2007-06/FederationMetadata.xml" backingFile="C:\Program Files (x86)\Internet2\Shib2Idp/metadata/ADFSSP-Metadata.xml" disregardSslCertificate="true" &gt;     &lt;MetadataFilter xsi:type="SignatureValidation" xmlns="urn:mace:shibboleth:2.0:metadata" trustEngineRef="shibboleth.FedTrustEngine" requireSignedMetadata="true" /&gt; &lt;/MetadataProvider&gt; &lt;/MetadataProvider&gt;</pre>

- 7) Scroll down to the **Security Configuration** section of relying-party.xml.
- 8) Replace the following TrustEngine in this section. Note the moved comment tag.

<b>Section before editing</b>	<pre>&lt;!-- This is where to put the engine used to evaluate the signature on loaded metadata.  &lt;security:TrustEngine id="shibboleth.FedTrustEngine" xsi:type="security:StaticExplicitKeySignature"&gt;     &lt;security:Credential id="FederationCredentials" xsi:type="security:X509Filesystem"&gt;         &lt;security:Certificate&gt;C:\Program Files\Internet2\Shib2Idp/credentials/federation.pem&lt;/security:Certificate&gt;     &lt;/security:Credential&gt; &lt;/security:TrustEngine&gt; --&gt;</pre>
<b>Section after</b>	<pre>&lt;!-- This is where to put the engine used to evaluate the</pre>

<b>editing</b>	<pre>signature on loaded metadata. --&gt; &lt;security:TrustEngine id="shibboleth.FedTrustEngine" xsi:type="security:StaticExplicitKeySignature"&gt;   &lt;security:Credential id="FederationCredentials" xsi:type="security:X509Filesystem"&gt;     &lt;security:Certificate&gt;C:\Program Files\Internet2\Shib2Idp/credentials/adfssign.cer&lt;     /security:Certificate&gt;   &lt;/security:Credential&gt; &lt;/security:TrustEngine&gt;</pre>
----------------	--

- 9) Save and close the relying-party.xml file.

## Add an Attribute to a Shibboleth-Generated Assertion

The Shibboleth IdP software is preconfigured to include a number of assertion attributes in the SAML assertions it generates, including an example of eduPersonScopedAffiliation. Here, we will add the eduPersonPrincipalName attribute to the collection to use in AD FS 2.0 sample application. We will limit inclusion of this attribute to assertions that are generated for Contoso.

### ▶ To add eduPersonPrincipalName to the Shibboleth security token

- 1) From the Shibboleth computer (shib.adatum.com), use Windows Explorer to navigate to the folder where the attribute-filter.xml configuration file is located. In this lab, the location is C:\Program Files (x86)\Internet2\Shib2IdP\conf\.
- 2) Right-click the attribute-filter.xml file, and then click **Edit**. The document should open in Notepad.
- 3) In Notepad, on the **Edit** menu, click **Find**.
- 4) In **Find what**, type **givenName**, and then click **Find Next**.
- 5) Uncomment and replace the following XML. Note the removed comment tags.

<b>Section before editing</b>	<pre>&lt;!-- &lt;AttributeFilterPolicy&gt;   &lt;PolicyRequirementRule xsi:type="basic:AttributeRequesterString" value="urn:example.org:sp:myPortal" /&gt;    &lt;AttributeRule attributeID="givenName"&gt;     &lt;PermitValueRule xsi:type="basic:ANY" /&gt;   &lt;/AttributeRule&gt;</pre>
-------------------------------	---

	<pre> &lt;/AttributeFilterPolicy&gt; --&gt; </pre>
<b>Section after editing</b>	<pre> &lt;AttributeFilterPolicy&gt;   &lt;PolicyRequirementRule     xsi:type="basic:AttributeRequesterString"     value="http://fsweb.contoso.com/adfs/services/trust"   /&gt;    &lt;AttributeRule attributeID="eduPersonPrincipalName"&gt;     &lt;PermitValueRule xsi:type="basic:ANY" /&gt;   &lt;/AttributeRule&gt; &lt;/AttributeFilterPolicy&gt; </pre>

- 6) Save and close the attribute-filter.xml file.
- 7) Click **Start**, click **Administrative Tools**, and then click **Services**.
- 8) Right-click the **Apache Tomcat** service, and then click **Restart**.



#### Note

Shibboleth administrators often need to configure LDAP queries to derive outbound assertion attribute values using the attribute-resolver.xml file. In contrast, in this lab the default configuration file that is distributed with Shibboleth already satisfies our requirements.

## Configure AD FS 2.0

### Add a Claims Provider Using Metadata

Once again, you use the metadata import capabilities of AD FS 2.0 to create the A. Datum claims provider. The metadata includes the public key that is used to validate security tokens that Shibboleth signs.

#### ▶ To add a claims provider using metadata

- 1) In AD FS 2.0, in the console tree, right-click the **Claims Provider Trusts** folder, and then click **Add Claims Provider Trust** to start the Add Claims Provider Trust Wizard.
- 2) On the **Select Data Source** page, click **Import data about the relying party published online or on a local network**.
- 3) In **Federation metadata address**, type `https://shib.adatum.com:444/idp/profile/Metadata/SAML`, and then click **Next**.
- 4) Click **OK** to acknowledge the message "Some of the content in the federation metadata

was skipped because it is not supported by AD FS 2.0.”

- 5) In the **Specify Display Name** page, leave **shib.adatum.com** and click **Next**.
- 6) Click **Next**, and then click **Close**.

## Edit Claim Rules for Claims Provider Trust

The following claim rule describes how data from Shibboleth is used in the security token that is sent to the WIF sample application. eduPersonPrincipalName and eduPersonScopedAffiliation are scoped attributes, meaning that Shibboleth (when it acts as the SP) checks the scope section of the attributes against a value that is provided in an IdP partner's metadata. When AD FS 2.0 acts as an SP, it does not read or store the IdP partner's scope value during its metadata import. However, it is possible to use the AD FS 2.0 claim rule language to simulate the "scope check" behavior of a Shibboleth SP, as shown below.

### ► To configure eduPerson claims for inbound receipt and scope checking

- 1) The **Edit Claim Rules** dialog box should already be open. If not, In the AD FS 2.0 center pane, under **Claims Provider Trusts**, right-click **shib.adatum.com**, and then click **Edit Claim Rules**.
- 2) On the **Acceptance Transform Rules** tab, click **Add Rule**.
- 3) On the **Select Rule Template** page, select **Send Claims Using a Custom Rule**, and then click **Next**.
- 4) On the **Configure Rule** page, in the **Claim rule name** box, type **Transform epPN to Name with Scope Check**.
- 5) In the **Custom Rule** window, type or copy and paste the following:

```
c:[Type == "urn:oid:1.3.6.1.4.1.5923.1.1.1.6", Value =~  
"^.+@adatum.com$"]  
=> issue(Type =  
"http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name",  
Issuer = c.Issuer, OriginalIssuer = c.OriginalIssuer, Value =  
c.Value, ValueType = c.ValueType);
```

- 6) Click **Finish**.
- 7) On the **Acceptance Transform Rules** tab, click **Add Rule**.
- 8) On the **Select Rule Template** page, select **Send Claims Using a Custom Rule**, and then click **Next**.
- 9) On the **Configure Rule** page, in the **Claim rule name** box, type **Transform epSA to Role with Scope Check**.
- 10) In the **Custom Rule** window, type or copy and paste the following:

```
c:[Type == "urn:oid:1.3.6.1.4.1.5923.1.1.1.9", Value =~
```

```

"^.+@adatum.com"]
=> issue(Type =
"http://schemas.microsoft.com/ws/2008/06/identity/claims/role",
Issuer = c.Issuer, OriginalIssuer = c.OriginalIssuer, Value =
c.Value, ValueType = c.ValueType);

```

11) Click **Finish**, and then click **OK**.



**Note**

The object-identifier-style URN strings are the formal SAML 2.0 names for eduPersonPrincipalName and eduPersonScopedAffiliation and names that the Shibboleth IdP software sends by default.



**Note**

Attributes with formal names that are represented in URN strings cannot be passed untransformed to WIF, because WIF can only understand claims using URL-style names. That is why we transform the incoming eduPerson attributes to Name and Role claims, instead of retaining their original claim types.



**Note**

Unlike Shibboleth, when it reads inbound attributes AD FS 2.0 ignores the *urn:oasis:names:tc:SAML:2.0:attrname-format:uri* name format that Shibboleth uses, and it simply reads the value.

## Edit Claim Rules for the WIF Sample Application

At this point, incoming claims have been received at AD FS 2.0, but rules that describe what to send to the WIF sample application have not yet been created. You now edit the existing claim rules for the sample application to take into account the new Shibboleth external claims provider.

### ▶ To edit the claim rules for the WIF sample application

- 1) In AD FS 2.0, in the left navigation area, under **Relying Party Trusts**, right-click **WIF Sample App**, and then click **Edit Claim Rules**.
- 2) On the **Issuance Transform Rules** tab, click **Add Rule**.
- 3) In the **Select Rule Template** page, select **Pass Through or Filter an Incoming Claim**, and then click **Next**.
- 4) On the **Configure Claim Rule** page, type the following values:

Name	Value
Claim rule name	Pass Name Rule

Incoming claim type	Name
---------------------	------

- 5) Leave the **Pass through all claim values** option selected, and then click **Finish**.
- 6) On the **Issuance Transform Rules** tab, click **Add Rule**.
- 7) On the **Select Rule Template** page, select **Pass Through or Filter an Incoming Claim**, and then click **Next**.
- 8) On the **Configure Claim Rule** page, type the following values:

Name	Value
Claim rule name	Pass Role Rule
Incoming claim type	Role

- 9) Leave the **Pass through all claim values** option selected, and then click **Finish**.
- 10) Click **OK**.



#### Note

If you configured the optional Step 6: Change Authorization Rules when you tested the original AD FS 2.0 with WIF Step-by-Step Guide deployment, ensure that you add back the **Permit All Users** issuance authorization rules for the WIF sample application before testing this scenario. Or, as an alternative, add a new **Permit or Deny Users Based on an Incoming Claim** rule allowing incoming Name ID = alansh@adatum.com to access the application.

## Change the AD FS 2.0 Signature Algorithm

When it signs assertions, Shibboleth uses the Secure Hash Algorithm 1 (SHA-1) for signing operations, while by default AD FS 2.0 expects partners to use SHA-256. Complete the following procedure to set AD FS 2.0 to SHA-1 for interoperability with Shibboleth.



#### Note

Although it is not configured in this lab, this same procedure is recommended for AD FS 2.0 relying party trusts that use Shibboleth. If the Shibboleth SP signs authnRequests or logout requests, AD FS 2.0 errors will occur unless this signature algorithm setting is changed.

#### ▶ To change the AD FS 2.0 signature algorithm

- 1) In the AD FS 2.0 center pane, under **Claims Provider Trusts**, right-click **shib.adatum.com**, and then click **Properties**.
- 2) On the **Advanced** tab, in the **Secure hash algorithm** list, select **SHA-1**, and then click **OK**.

## Step 5: Test Shibboleth as the Identity Provider and AD FS 2.0 as the Relying Party

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In this scenario, Alan Shen (alansh) from A. Datum accesses the Contoso WIF sample application.



### Note

Clear all the cookies in Internet Explorer on the AD FS 2.0 computer (fsweb.contoso.com). To clear the cookies, click **Tools**, click **Internet Options**, click **Delete under Browsing History**, and then select cookies for deletion.



### To access the WIF sample application

- 1) On the AD FS 2.0 computer, open a browser window, and then navigate to <https://fsweb.contoso.com/ClaimsAwareWebAppWithManagedSTS/default.aspx>.
- 2) The first page prompts you to select your organization from a list. Select **shib.adatum.com** from the list, and then click **Continue to Sign In**.



### Note

This page did not appear in the previous example when you were redirected to AD FS 2.0. That is because at that point there was only one identity provider registered in AD FS 2.0. When only one IdP is available, AD FS 2.0 defaults to forwarding requests to that IdP.

- 3) The Shibboleth forms login page appears. Log in with the user name **alansh** and the password you created for the user earlier, and then click **Login**.

When you access the WIF application, note the presence of the Name and Role claims, which were added assertion attributes, and which successfully passed the "scope check" rule limitation of passing only values with the adatum.com suffix.

# Appendix A: Using AD FS 2.0 in the InCommon Federation

In addition to the configuration steps provided earlier in this document, the following is a list of additional considerations for organizations using AD FS 2.0 for participation in the [InCommon](http://go.microsoft.com/fwlink/?LinkId=204126) federation (<http://go.microsoft.com/fwlink/?LinkId=204126>).

Topic Areas	Issue Description	Workarounds
Metadata	The <a href="http://go.microsoft.com/fwlink/?LinkId=204131">InCommon metadata file</a> ( <a href="http://go.microsoft.com/fwlink/?LinkId=204131">http://go.microsoft.com/fwlink/?LinkId=204131</a> ) includes multiple federation entities (EntityDescriptors), but AD FS 2.0 cannot import metadata files that include more than one EntityDescriptor.	Open-source solution (FEMMA) discussed <a href="#">below</a> .
Metadata, Certificates	InCommon EntityDescriptor elements sometimes contain more than one encryption certificate, but AD FS 2.0 fails to import entities that include more than one encryption certificate.	No product-based workaround. Organizations using AD FS 2.0 can add these organizations manually, ignoring all but one encryption certificate. Organizations publishing metadata through InCommon can improve AD FS 2.0 interoperability by publishing only one encryption certificate per entity.
Metadata, Certificates	The InCommon metadata file includes instances where multiple EntityDescriptors share a single certificate, but AD FS 2.0 fails to import any entities that present a certificate already in the database.	No product-based workaround. Organizations publishing metadata through InCommon can improve AD FS 2.0 interoperability by using unique certificates per entity. The same certificate can be used for signing and encryption.

Topic Areas	Issue Description	Workarounds
IdP Discovery	The InCommon WAYF server currently only speaks the SAML 1.1 protocol, which AD FS 2.0 does not support. Therefore, the WAYF cannot generate authnRequests for AD FS 2.0 IdPs.	Three options: <ul style="list-style-type: none"> <li>• SPs can run their own Shibboleth discovery service.</li> <li>• Use <a href="#">preformatted hyperlinks</a> that identify AD FS 2.0 IdPs directly.</li> <li>• SPs can use AD FS 2.0, which automatically provides discovery services for registered IdPs.</li> </ul>

## Metadata Parsing with FEMMA



### Note

FEMMA is a tool that is independent and separate from both AD FS 2.0 and Shibboleth. Microsoft, Internet2, and InCommon neither developed this tool nor endorse it through its reference in this whitepaper.

[Federation Metadata Manager for ADFS](http://go.microsoft.com/fwlink/?LinkId=204165) (<http://go.microsoft.com/fwlink/?LinkId=204165>), written by Cristian Mezzetti of the University of Bologna, is a Python script that parses Shibboleth federation metadata XML content and creates (a) a pool of metadata files (one for each partner entity) and (b) a Windows PowerShell command-line interface script that automatically imports the entities into AD FS 2.0. In addition, FEMMA includes templates for automatically importing claim rules into newly created partner entities.

Testing of FEMMA during development of this lab was successful. We were able to use FEMMA to parse a multi-entity metadata file and automatically import the separate entities with Windows PowerShell. The following are the steps for testing FEMMA v0.2, with AD FS 2.0 as the IdP and Shibboleth as the SP.

### On the Shibboleth computer ([shib.adatum.com](https://shib.adatum.com)):

1. Use Internet Explorer to browse to <https://shib.adatum.com/Shibboleth.sso/Metadata>, and save the file to the IIS root (C:\inetpub\wwwroot\ ) as SP.xml.
2. Use Notepad to edit SP.xml:
  - a. Add the following to the top of the file:
 

```
<md:EntitiesDescriptor xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata" >
```
  - b. Add the following to the end of the file:

</md:EntitiesDescriptor>

- c. Add a second, fake <EntityDescriptor> to SP.xml:
  - i) Copy and paste the entire existing <EntityDescriptor> into SP.xml a second time.
  - ii) Change the entityID of the copied entity to `https://shib.adatum.com/foo`.
  - iii) Replace the signing and encryption certificates in the SPSSODescriptor:
    - (1) Temporarily rename the existing `sp-key.pem` and `sp-cert.pem` files in the Shibboleth SP config directory (`C:\opt\shibboleth-sp\etc\shibboleth`) to `old-sp-key.pem` and `old-sp-cert.pem`.
    - (2) Run the Keygen tool in this folder from a command prompt. This will create new `sp-key.pem` and `sp-cert.pem` files.
    - (3) Open the newly generated `sp-cert.pem` file with Notepad.
    - (4) Copy the Base-64 encoded string.
    - (5) In `/foo <SPSSODescriptor>`, replace the two certificates with the contents.
    - (6) Save SP.xml.
    - (7) Rename the `sp-key.pem` and `sp-cert.pem` files to `foo-sp-key.pem` and `foo-sp-cert.pem`. Rename `old-sp-key.pem` and `old-sp-cert.pem` back to `sp-key.pem` and `sp-cert.pem`.

### On the AD FS 2.0 computer (fsweb.contoso.com):

1. Download [Python 2.5](http://go.microsoft.com/fwlink/?LinkId=204170) (<http://go.microsoft.com/fwlink/?LinkId=204170>).
2. Install Python.
3. Download [lxml](http://go.microsoft.com/fwlink/?LinkId=204171) (<http://go.microsoft.com/fwlink/?LinkId=204171>).
4. Place the lxml install file in the Python folder (`C:\Python25\`).
5. Install lxml.
6. Download [FEMMA](http://go.microsoft.com/fwlink/?LinkId=204165) (<http://go.microsoft.com/fwlink/?LinkId=204165>).
7. Unzip FEMMA. In this lab, the install folder is `C:\femma-0.2`.
8. Edit the femma.py Python script. Change the idpEntityID field to read `https://shib.adatum.com/adfs/services/trust`, and save.
9. In the AD FS 2.0 console, delete the current relying party trust for shib.adatum.com. AD FS 2.0 does not allow the creation of multiple relying party trusts with the same EntityID.
10. Open a command prompt, and change the directory to the femma folder (in this lab, `C:\femma-0.2\`).
11. Initiate FEMMA. In this lab, we used the following:

```
C:\femma-0.2>c:\python25\python.exe femma.py -m https://shib.adatum.com/SP.xml
```
12. Open Windows PowerShell.
13. Type **Set-ExecutionPolicy Unrestricted** at a Windows PowerShell command prompt to enable scripts.

14. Initiate the Windows PowerShell script at the Windows PowerShell prompt. In this lab, we typed the following:  
C:\femma-0.2\update\_adfs\_rptrust.ps1.
15. In the AD FS 2.0 console, click **Refresh** to see the new relying parties.
16. Right-click the relying party trust with the name https://shib.adatum.com/shibboleth, and then click **Edit Claim Rules**.

 **Note**

The ScopedAffiliation rules will not work because Rule 1 depends on an Exchange attribute that is not in our lab schema. Rule 1 can be modified to work with an available multi-variable attribute, for example the **description** attribute.

17. Recreate and save the claim rules that you added [earlier in this document](#).
18. Use Internet Explorer to visit https://shib.adatum.com/secure. Note the persistentid value, which is presented with the proper NameQualifiers in accordance with the claim rule that is automatically included by FEMMA from the ruleset\_persistent.tpl file in the templates folder.

 **Note**

Larger files like the InCommon metadata file may take a long time to process, because Windows PowerShell will encounter numerous exceptions during the import related to the second and third (certificate-related) issues in the previous table. FEMMA includes a blacklist capability for optionally excluding entities from the generated Windows PowerShell script, which can improve performance.

## Using FEMMA to Import IdPs

FEMMA, in its current form, only imports and configures SPSSODescriptors in SAML 2.0 metadata files. Those interested in importing IDPSSODescriptors can use the following edited Python script. Changes to the original FEMMA script are highlighted in red. In addition, you will need edited template files. These files are provided after the script.

### IDP-parsing FEMMA Script

```
#!/usr/bin/env python
#
# Name: Federation Metadata Manager for ADFS (FEMMA)
# Version: 0.1
# Author: Cristian Mezzetti cristian.mezzetti@unibo.it
# Edited By: Dave Martinez
# Home-page: http://sourceforge.net/projects/femma
# License: GNU GPL v2
# Description: This script parses a (Shibboleth) federation
```

```

#         metadata XML content and creates a pool of
#         metadata files and a powershell script in order
#         to automatically configure and update an Active
#         Directory Federation Services STS (Security Token Service).
#
# Copyright (C) 2010 Cristian Mezzetti
#
# This program is free software; you can redistribute it and/or modify
# it under the terms of version 2 of the GNU General Public License as
# published by the Free Software Foundation.

```

```

from lxml import etree
import urllib2, os, sys, getopt, string, ConfigParser, re
from string import Template

```

```

#### Adapt to your needs

```

```

spEntityID = "http://FSWEB.contoso.com/adfs/services/trust"
myClaimType = 'http://unibo/idem'
fedNamePrefix = "IDEM"
#####

```

```

settingsFile = "settings.cfg"
xmlDir = os.getcwd() + os.sep + "entities-temp"
rulesetDir = os.getcwd() + os.sep + "ruleset-temp"
templateDir = os.getcwd() + os.sep + "templates"
rulesetBaseTemplate = templateDir + os.sep + "ruleset_base.tpl"
rulesetPersistentTemplate = templateDir + os.sep + "ruleset_persistent.tpl"
rulesetTransientTemplate = templateDir + os.sep + "ruleset_transient.tpl"
pshTemplate = templateDir + os.sep + "powershell_metadata_update.tpl"
pshBaseTemplate = templateDir + os.sep + "powershell_base.tpl"

```

```

def tearUp():
    """
    Initializes temp directories and checks for templates
    """
    print("Starting")

```

```

if os.path.exists(templateDir):
    if not (os.path.exists(xmlDir) and os.path.isdir(xmlDir)):
        os.mkdir(xmlDir)
    if not (os.path.exists(rulesetDir) and os.path.isdir(rulesetDir)):
        os.mkdir(rulesetDir)
else:
    print "ERROR: Template dir " + templateDir + " not found."
    sys.exit(1)

def rulesetCreation(myClaimType, rulesetFileName, idpEntityID, idpScope,
persistent=False):
    """
    Creates Identity Provider ruleset file with NameID creation based on
    transient-id by default
    """
    try:
        # load template from configured file
        ruleBase = Template(open(rulesetBaseTemplate, "r").read())
        if persistent:
            ruleID = Template(open(rulesetPersistentTemplate, "r").read())
        else:
            ruleID = Template(open(rulesetTransientTemplate, "r").read())
        # substitutes rules and entityID
        outRuleset = ruleBase.substitute(cpScope=idpScope) + "\n" +
ruleID.substitute(claimBaseType=myClaimType, spNameQualifier=spEntityID,
nameQualifier=idpEntityID)
        # create ruleset files
        rulesetFile = open(rulesetFileName, "w")
        rulesetFile.write(outRuleset)
        rulesetFile.close()
    except Exception, e:
        print(e)
    return

def entityToIgnore(entityID):
    """
    Checks if the provided entityID of the Identity Provider is blacklisted

```

To blacklist an entity ID create a settings file with similar syntax:

```
[ExcludeEntityID]
entity1 = "https://my.example.com/service"
entity2 = "https://anotherexample.net/service2"
"""
if os.path.exists(settingsFile):
    config = ConfigParser.ConfigParser()
    config.read(settingsFile)
    toIgnore = config.items('ExcludeEntityID')

    if entityID in [x[1] for x in toIgnore]:
        return True
    else:
        return False

def stripRolloverKeys(entity):
    """
    If the entity metadata contains keys for safe-rollover, strips the Standby
    key because ADFS can't handle it
    """
    toRemove = []
    for i in
entity.iterdescendants('{http://www.w3.org/2000/09/xmldsig#}KeyName'):
        if i.text == "Standby":
            toRemove.append(i.getparent().getparent())

    for j in toRemove:
        parent = j.getparent()
        parent.remove(j)
        print "WARNING: removed KeyName element used for safe-rollover (ADFS
can't handle it)"

    return entity

def metadataExtraction(mdUrl, xmlDir):
    """
    Creates a metadata file for each entityID in Federation EntitiesDescriptor
```

```

"""
try:
    pshScript = ""
    pshScriptTemplate = Template(open(pshTemplate, 'r').read())

    md = urllib2.urlopen(mdUrl)
    mdString = md.read()
    # use CRLF instead of LF
    mdString = re.sub("\r?\n", "\r\n", mdString)
    fedMetadata = etree.fromstring(mdString)

    # for EntityDescriptor extracts IDP and write a single metadata file
    for entity in
fedMetadata.findall('{urn:oasis:names:tc:SAML:2.0:metadata}EntityDescriptor'):
        idpDescriptor =
entity.find('{urn:oasis:names:tc:SAML:2.0:metadata}IDPSSODescriptor')
        if (idpDescriptor is not None):
            attribute = idpDescriptor.get('protocolSupportEnumeration')
            # verifies that the IDP supports SAML2
            if (string.find(attribute,
'urn:oasis:names:tc:SAML:2.0:protocol') != -1):
                if not entityToIgnore(entity.attrib['entityID']):
                    # creates a metadata file with only one EntityDescriptor
for ADFS

                    entity = stripRolloverKeys(entity)
                    entities = etree.fromstring(mdString)
                    entities.clear()
                    entities.insert(0, entity)
                    fname = entity.attrib['entityID'].replace('/',
'_').replace('.', '_').replace(':', '_')
                    fname = "".join([x for x in fname if x.isalpha() or
x.isdigit() or x == '-' or x == '_'])
                    print "Generating XML metadata of " +
entity.attrib['entityID'] + " Identity Provider"
                    entityFileName = xmlDir + os.sep + fname + ".xml"
                    entityFile = open(entityFileName, "w")
                    entityFile.write(etree.tostring(entities))

```

```

        entityFile.close()
        print "Generating claim ruleset for Identity Provider: " +
entity.attrib['entityID']
        rulesetFileName = rulesetDir + os.sep + fname
        Scope =
idpDescriptor.find('{urn:oasis:names:tc:SAML:2.0:metadata}Extensions/{urn:mace
:shibboleth:metadata:1.0}Scope')
        idpScope=Scope.text
        rulesetCreation(myClaimType, rulesetFileName,
entity.attrib['entityID'], idpScope)
        pshScript +=
pshScriptTemplate.substitute(fedName=fedNamePrefix,
metadataFile=entityFileName, cpName=entity.attrib
['entityID'], rulesetFile=rulesetFileName)

    if pshScript:
        print "Generating powershell script for Claims Provider
configuration update..."
        pshScriptBaseTemplate = Template(open(pshBaseTemplate, 'r').read())
        pshScript = pshScriptBaseTemplate.substitute(fedName=fedNamePrefix)
+ pshScript
        pshScriptFile = open('update_adfs_cptrust.ps1', 'w')
        pshScriptFile.write(pshScript)
        pshScriptFile.close()

    except Exception, e:
        print(e)
    return

def usage(ret=0):
    print "-h, --help"
    print "-t, --test"
    print "-m, --metadata: URL of federation metadata"
    print "-x, --xmlsec: path to xmlsec binary for signature verification"
    sys.exit(ret)

def main():

```

```

try:
    opts, args = getopt.getopt(sys.argv[1:], "htm:x:", ["help", "test",
"metadata=", "xmlsec="])

    except getopt.GetoptError, err:
        print str(err)
        usage(2)

mdUrl = ""
if opts.__len__() != 0:
    for o, a in opts:
        if o in ("-x", "--xmlsec"):
            xmlsecbin = a
        elif o in ("-m", "--metadata"):
            mdUrl = a
        else:
            usage()
    metadataExtraction(mdUrl, xmlDir)
else:
    usage()

if __name__ == "__main__":
    tearUp()
    main()

```

## FEMMA Template Files – IDP

### Powershell\_base.tpl

```

Get-ADFSClaimsProviderTrust | Where-Object {$$.Name -like "($fedName)*"} |
ForEach-Object {Remove-ADFSClaimsProviderTrust -TargetName $$_.Name}

```

### Powershell\_metadata\_update.tpl

```

Add-ADFSClaimsProviderTrust -Name "($fedName) $cpName" -MetadataFile
"$metadataFile"
Set-ADFSClaimsProviderTrust -TargetName "($fedName) $cpName" -
AcceptanceTransformRulesFile "$rulesetFile" -SignatureAlgorithm
http://www.w3.org/2000/09/xmldsig#rsa-sha1

```

### Ruleset\_base.tpl

```

@RuleName = "Transform eppn to Name with Scope Check"
c:[Type == "urn:oid:1.3.6.1.4.1.5923.1.1.1.6", Value =~ "^.+@$cpScope$"]

```

```
=> issue(Type = "http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name",  
Issuer = c.Issuer, OriginalIssuer = c.OriginalIssuer, Value = c.Value,  
ValueType = c.ValueType);
```

```
@RuleName = "Transform epSA to Role with Scope Check"  
c:[Type == "urn:oid:1.3.6.1.4.1.5923.1.1.1.9", Value =~ "^.+@$cpScope"]  
=> issue(Type =  
"http://schemas.microsoft.com/ws/2008/06/identity/claims/role", Issuer =  
c.Issuer, OriginalIssuer = c.OriginalIssuer, Value = c.Value, ValueType =  
c.ValueType);
```

#### **Ruleset\_persistent.tpl**

```
@RuleName = "Pass Persistent NameID"  
c:[Type ==  
"http://schemas.xmlsoap.org/ws/2005/05/identity/claims/nameidentifier",  
Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimproperties/for  
mat"] == "urn:oasis:names:tc:SAML:2.0:nameid-format:persistent"]  
=> issue(claim = c);
```

#### **Ruleset\_transient.tpl**

```
@RuleName = "Pass Transient NameID"  
c:[Type ==  
"http://schemas.xmlsoap.org/ws/2005/05/identity/claims/nameidentifier",  
Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimproperties/for  
mat"] == "urn:oasis:names:tc:SAML:2.0:nameid-format:transient"]  
=> issue(claim = c);
```



#### **Note**

To see the transient Name ID that Shibboleth generates in the WIF sample application, add a claim rule to the WIF Sample App relying party in AD FS 2.0 that passes an inbound transient Name ID to the application.

# Appendix B

---

The purpose of this section is to highlight other possibilities that are outside the scope of this document but are available to architects when they deploy federation between AD FS 2.0 and Shibboleth.

## WS-Federation Support

AD FS 2.0 also supports the WS-Federation protocol for Web-based federation and SSO. The Shibboleth SP likewise supports WS-Federation.

For information about how to deploy a test lab between Shibboleth and AD FS using WS-Federation, see the legacy [ADFS Step-by-Step Guide: Federation with Shibboleth Federation Services](http://go.microsoft.com/fwlink/?LinkId=204190) (<http://go.microsoft.com/fwlink/?LinkId=204190>). While this document was written using older versions of AD FS and Shibboleth, the content in this document can be extrapolated to current versions.

## Certification Authority–Issued, Token-Signing Certificates

For security reasons, production federation deployments require the use of digitally signed security tokens. This lab uses self-signed, private key certificates, which are generated from inside the AD FS 2.0 and Shibboleth products, for signing security tokens.

As an alternative, organizations can choose to use a private key certificate issued by a certification authority (CA) for security-token signing. The primary benefit of using certificates that are issued by a CA for token-signing is the ability to check for possible certificate revocation against the certificate revocation list (CRL) from the issuing CA when acting as a relying party or service provider.

Shibboleth does not perform CRL checking. Instead, it uses continuously refreshing/expiring metadata to manage the replacement and discontinuation of support for a given certificate. In AD FS 2.0, CRL checking is enabled by default for all claims provider trusts. This has implications in federation deployments between Shibboleth (acting as an IdP) and AD FS 2.0 (acting as an RP):

- If the signing private key that Shibboleth uses includes a CRL Distribution Point (CDP) extension, that location must be accessible by the AD FS 2.0 Federation Server, or CRL checking fails, resulting in a failed access attempt. CDP extensions are added by default to certificates that are issued by Active Directory Certificate Services (AD CS) in Windows Server 2008 R2.
- If the signing private key does not include a CDP extension, no CRL checking is performed by AD FS 2.0.
- You can turn off CRL checking for a specific claims provider trust by using the Windows PowerShell command-line and scripting environment. For more information, see the [AD FS 2.0 Windows PowerShell Administration](http://go.microsoft.com/fwlink/?LinkId=194005) section of the AD FS 2.0 Operations Guide (<http://go.microsoft.com/fwlink/?LinkId=194005>) and the [AD FS 2.0 Cmdlets Reference](http://go.microsoft.com/fwlink/?LinkId=177389) (<http://go.microsoft.com/fwlink/?LinkId=177389>).

## Federated Single Logout

Both AD FS 2.0 and the Shibboleth SP include support for federated single logout. Federated single logout makes it possible for a user to log out completely from their IdP federation server, as well as any replying party applications that are federated through a particular browser session. Federated logout seeks to improve security by leaving no sessions open for misuse, hijacking, or other malicious actions.

## SAML 2.0 Artifact Profile

Both AD FS 2.0 and Shibboleth support the SAML 2.0 HTTP artifact binding as part of their support for the SAML 2.0 protocol. The artifact profile differs in approach from the HTTP POST profile, and it may be preferred in some situations.

## Handling Name Qualifiers in AD FS 2.0

In AD FS 2.0, both the creation and consumption of name qualifiers for use with Name ID elements is done using the custom-developed claim rules. The FEMMA example described in Appendix A uses the claim rule language to generate a persistent ID from AD FS 2.0 with associated NameQualifier and SPNameQualifier values, which Shibboleth properly displays the web server as a “persistentid” header with a \$NameQualifier!\$SPNameQualifier!\$Value format.

When it acts as a relying party/service provider token service, AD FS 2.0 can use custom claim rules (like the one below) to read and use name qualifier variables. This rule passes inbound Name IDs to the application, retaining their original format but changing the value to include the NameQualifier and SPNameQualifier values in the output string.

```
c:[Type ==
"http://schemas.xmlsoap.org/ws/2005/05/identity/claims/nameidentifier"]
=> issue(Type = c.Type,
Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimproperties/for
mat"] =
c.Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimproperties/f
ormat"], Value =
c.Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimproperties/n
amequalifier"] + "!" +
c.Properties["http://schemas.xmlsoap.org/ws/2005/05/identity/claimproperties/s
pnamequalifier"] + "!" + c.Value);
```



### Note

This script works only when the Name ID is sent in the Subject element of the XML assertion. In cases in which a Name ID is provided in an AttributeStatement (for example, as the value of an eduPersonTargetedID attribute), the Name ID value (that is, the opaque identifier) is usable, but the name qualifiers cannot be appended to the value, as shown above.