Microsoft Entra ID (SSO and User Provisioning)

11/15/2024 12:32 pm MST

Single Sign On (SSO) is available for DocBoss. If enabled, users with the company domain will be redirected to their identity provider to sign in to access DocBoss. The instructions below outline how to set up SSO with DocBoss when using **Microsoft Entra ID** as the identity provider.

Set up

Requirements

The first step is to contact DocBoss Support and request that Single Sign On is enabled.

We will ask for some information. Your IT will need to gather this:

- Domain (users with email from this domain will be redirected to identity provider)
- Type of the application they use (ie. Microsoft Azure)
- Supported account types, if applicable (see below, Azure example step 2)
- Application (client) ID (example step 3)
- Client Secret (example step 4)
- Endpoints (Authorization, Token, Issuer) (example step 6)

After this information is provided, DocBoss Support will provide a **redirect URI** for your application. This will redirect users back to DocBoss after authentication in your identity provider. This must be added in your identity provider application by your IT.

Steps

The example below uses Microsoft Entra ID as the identity provider. If you are using a different provider, refer to their documentation for how to set up Single Sign On.

1. Log into Microsoft Azure and select **App registrations > Register an application**.

2. Enter the display name and account type. Make note of the account type to advise DocBoss Support.

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Home > App registrations >	
Register an application	
* Name	
The user-facing display name for this application (this can be changed later).	1
XXXX	✓
Supported account types	
Who can use this application or access this API?	
 Accounts in this organizational directory only (DocBoss only - Single tenant) 	
 Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) 	
 Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsof Xbox) 	ft accounts (e.g. Skype,
O Personal Microsoft accounts only	
Help me choose	
Redirect URI (optional)	
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now i changed later, but a value is required for most authentication scenarios.	is optional and it can be
Select a platform V e.g. https://example.com/auth]
Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by	adding from Enterprise applications.

3. On the next screen, under the **Essentials** tab, copy the **Application (client) ID**. Make note of this to provide DocBoss Support.

4. On the **Client credentials** option, select **Add a certificate or secret**. Add a certificate and copy the secret to provide DocBoss Support.

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	Directory (tenant) ID :			Managed application in	1 I : <u>XXXX</u>			
	Supported account types : My organization	n only						
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5. Select the **Endpoints** tab.

6. Copy the link for the **OpenID Connect metadata document** to provide DocBoss Support. This includes all of the endpoints (Authorization, Token, Issuer) DocBoss requires information on.

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Home > App registrations >		Endpoints	
▶ Search ◇ «	5	OAuth 2.0 authorization endpoint (v2)	
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 Quickstart Integration assistant Manage 	▲ Essentials Dicular name :	OAuth 2.0 authorization endpoint (v1)	
 Branding & properties Authentication 	Application (client) ID : Object ID :	OAuth 2.0 token endpoint (v1)	
← Certificates & secrets ↓ ↓ Token configuration	Directory (tenant) ID : Supported account types :	OpenID Connect metadata document https://login.microsoftonline.com /openid-configuration D	-
 API permissions Expose an API 	Welcome to the new and improved App registrations. Looking to learn how it's changed from App registrations [Legscy]? Learn	Microsoft Graph API endpoint	
 App roles Owners 	Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Al Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. <u>Learn more</u>	Pederation metadata document	
 Roles and administrators Manifest 	Get Started Documentation	Ws-rederation sign-on endpoint	
> Support + Troubleshooting	Build your application with	sawer sign on enopoint	
	The Microsoft identity platform is an authentication service, open-source libraries, a access and protect APIs, and add s	SAML-P sign-out endpoint	

The next step is only available after providing the information from the previous steps to DocBoss Support:

7. After DocBoss Support provides **redirect URI**, navigate to the **Essentials** section of this app in Azure and select **Add a redirect URI**. Paste the redirect URI provided by DocBoss.

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	Object ID :	Application ID URI	: Add an Application ID URI			
	Directory (tenant) ID :	Managed application	on in I : XXXX			
	Supported account types : My organization only					
	Welcome to the new and improved App registrations. Looking to learn how it's changed from App registrations (Legacy)? Learn more					
	Starting June 30th 2020 we will no longer add any new features to Acure Active Directory Authentication Library (ADAL) and Azure Active Directory Graph. We will continue to provide technical support and security updates but we will no longer add any new features to Azure Active Directory Graph. Learn more					
	Get Started Documentation					
	Build your application with the Microsoft identity platform					
	The Microsoft identity platform is an authen	tication service, open-source libraries, and application management to access and protect APIs, and add sign-in for your users and custor	ols. You can create modern, standards-based authentication solutions, mers. Learn morec?			

Implementing

Once the steps above are complete and you have provided the information to DocBoss as noted in them, reach out to DocBoss Support and we will schedule a meeting to enable SSO (and user provisioning, if using). Our Support will also provide a redirect URI for your application. This will redirect users back to DocBoss after authentication in your identity provider. This must be added in your identity provider application for SSO to function.

If you want to try the function, then schedule a roll out for your users we can schedule the meeting to enable, test (have a user login), then disable within a few minutes. Already logged in users would not be affected. You can then communicate to your user base with a timeline for the switch. Alternatively, we can just leave it enabled after the test is successful.