

SSO with Okta

09/12/2024 10:38 am MDT

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 **Okta** as the identity provider.

Requirements

Typically, DocBoss Support will provide the following:

- Single Sign-On URL (Recipient URL or Destination URL)
- Audience Restriction URL
- SCIM connector base URL: <https://system.docboss.com/scim/v2/> [system2, 3 ...]
- Instructions on how to get a token
- The list of fields for creating/updating user requests (optional - using SCIM protocol)
 - **username** [required] – This must be an email address within the SSO domain
 - **user.givenName** [required]
 - **user.familyName** [required]
 - **user.title** – This value is saved as the **Title** field for the user in DocBoss
 - **user.timezone** - This value is saved as user's time zone in DocBoss
 - **user.userType** [required] – This value is saved as the user's role in DocBoss. Allowed values are Admin, Full, Reviewer, and View.

DocBoss Support will need the following information from your IT:

- **Metadata URL**

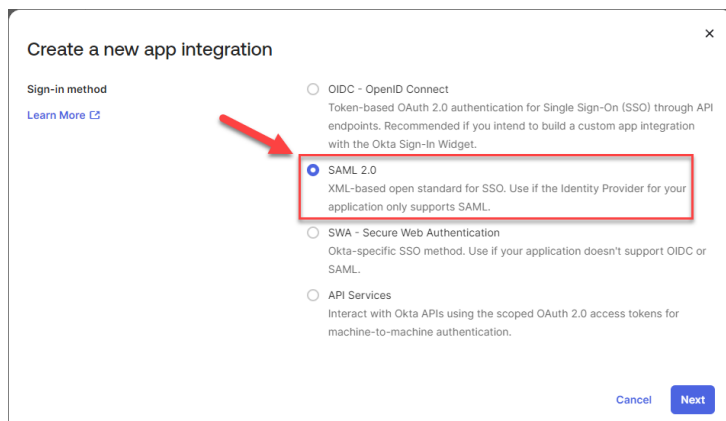
Below is an example of how we configured application and setup fields for mapping, but your IT will know how to configure this best for your company's needs.

Setup

Add application in Okta

In Okta, follow the steps below:

1) Create a new app integration > select **SAML 2.0**



2) Set the following values on the next slide:

a)	Single sign-on URL	[provided by DocBoss]
b)	Audience URI (SP Entity ID)	[provided by DocBoss]
c)	Name ID format	EmailAddress
d)	Application username	Okta username
e)	Update application username on	Create and update

3) Copy the Metadata URL to send to DocBoss Support:

Set up SCIM provisioning

Next, set up SCIM provisioning to allow adding and updating DocBoss users through Okta.

4) Enable SCIM provisioning and Save.

5) Add the following SCIM Connection settings:

a)	SCIM connector base URL	DocBoss Support will provide. For example, https://system.docboss.com/scim/v2/
b)	Unique identifier field for users	userName
c)	Supported provisioning actions	Import New Users and Profile Updates, Push New Users, Push Profile Updates, Push Groups
d)	Authentication Mode	HTTP Header
e)	Authorization Bearer	Long-term token from DocBoss Security Settings > API Authorization > Tools > Token

6) On the **Provisioning > To App** tab, enable **Create Users**, **Update User Attributes**, and **Deactivate Users**:

Set up user info fields

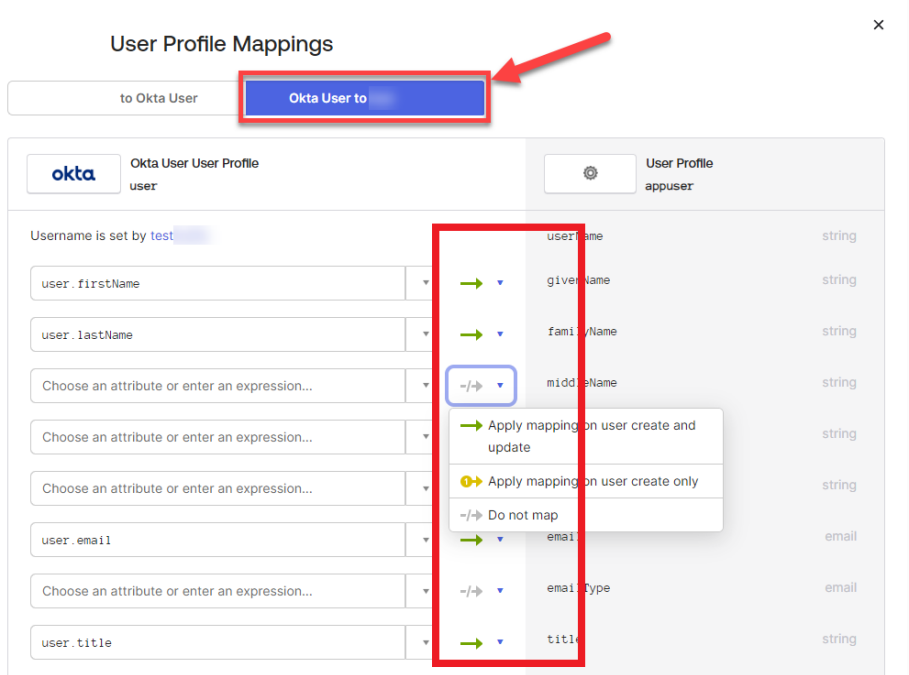
Next, set up fields for users. The following fields exist in the Okta by default:

- user.givenName [required]
- user.givenName [required]
- user.title – We used it for title field for the user in the docboss
- user.timezone
- user.userType [required] – we used it for the Role

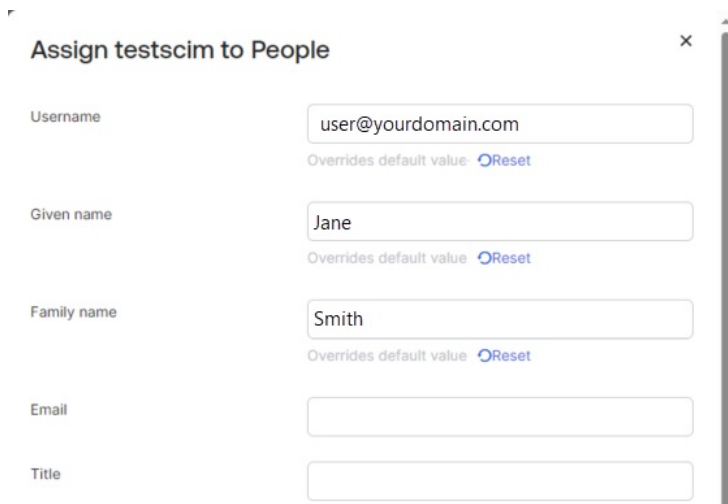
Mapping is set by default. User only should remove mapping for excess fields:

7) Under **Provisioning > To App > Attribute Mappings**, set to *not* apply mapping for all fields except the following:

- user.firstName
- user.lastName
- user.title
- user.timezone
- user.userType



This is set so that when a user is assigned to DocBoss in Okta, only the selected fields will be copied and sent to DocBoss.



8) Optionally, you can remove excess fields on the **Profile Editor > Application Profile > Attributes** to hide it on the assign user to application form:

Attributes

[+ Add Attribute](#) [Mappings](#)

Filters	Display Name	Variable Name	Data type	Attribute Type		
All	Username	userName	string	Base		
Base	Given name	givenName	string	Custom		
Custom	Family name	familyName	string	Custom		
	Primary email	email	string	Custom		
	Title	title	string	Custom		
	Primary phone	primaryPhone	string	Custom		
	Street address	streetAddress	string	Custom		
	Locality	locality	string	Custom		
	Region	region	string	Custom		
	Postal Code	postalCode	string	Custom		

Or you can add some fields as custom to add more settings for the field.

Advanced

Custom Fields

Limit values for Role type

Configuration example:

Role

Data type: string

Display name:

Variable name:

Description:

Enum: Define enumerated list of values

Display name	Value	
<input type="text" value="Admin"/>	Admin	
<input type="text" value="Full"/>	Full	
<input type="text" value="Reviewer"/>	Reviewer	
<input type="text" value="View"/>	View	

[+ Add Another](#)

Restriction: Value must be unique for each user

Attribute length:

Attribute required: Yes

Result:

Add Person

User type ●

First name

Last name

Username

Primary email

Groups (optional) You haven't added any [groups](#)

Role

Activation

I will set password

Do not send unsolicited or unauthorized activation emails. [Read more](#)

Add this to the Application profile in Okta (**Profile Editor > Application User Profile**). It is important to set correct External name (that DocBoss uses in our API):

Role1

Data type string

Display name ●

Variable name ●

External name userType

Additional settings

There are additional settings in Okta which your IT may wish to configure. For example, there is an option to set a default value for fields:

testscim - Role1

Attribute value

Apply on