

Okta (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 **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 (only needed if 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** – This value is saved as the user's role in DocBoss. Allowed values are Admin, Full, Reviewer, and View. If not included, user's role will be set to View.

DocBoss Support will need the following information from your IT:

- **Metadata URL**

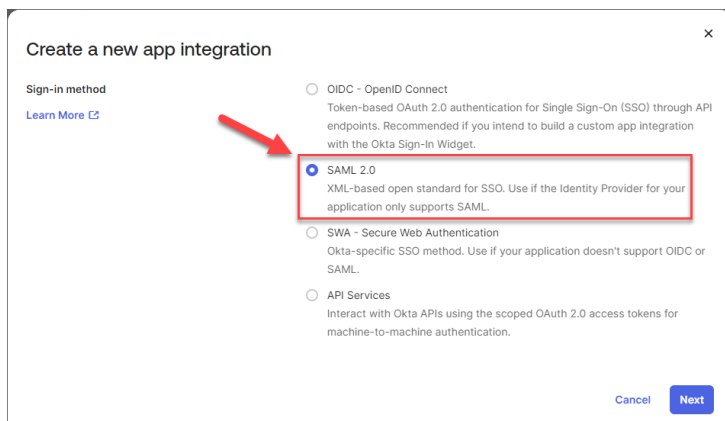
Below is an example of how we configured application and setup fields for mapping, but your IT will know how to configure this best for your company's needs.

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 – we used it for the Role

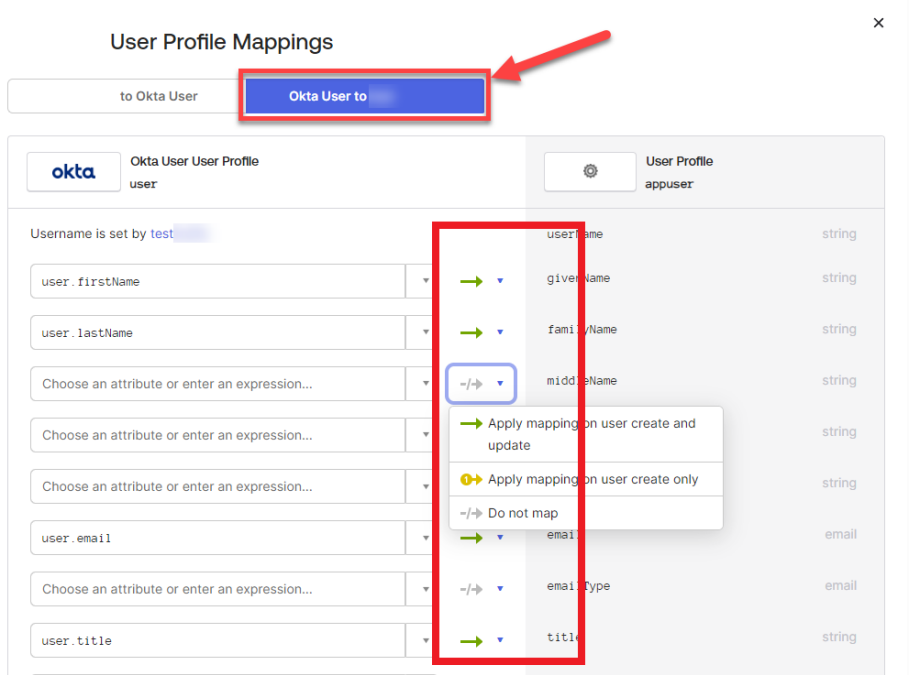
Note that there is no default field in Okta that matches our "affiliate" field. A custom field can be added for this (see below instructions on adding custom fields). If not included, the user will be given access to the affiliate with the smallest company ID (the original affiliate).

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

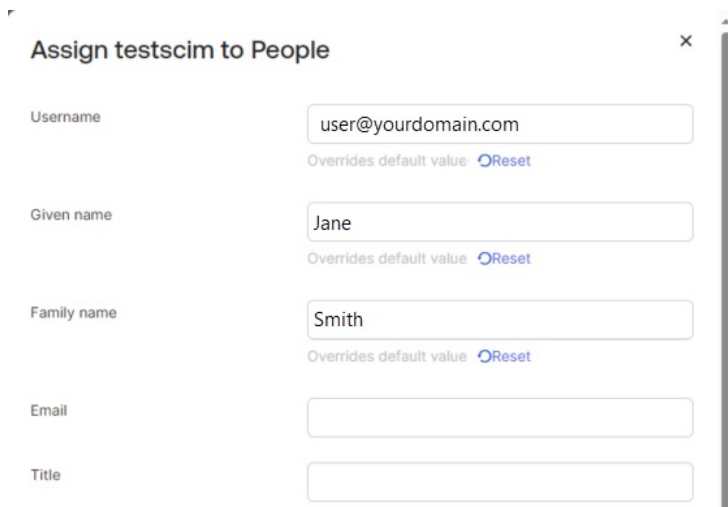
7) Under **Provisioning > To App > Attribute Mappings**, set to *not* apply mapping for all fields except the following:

- 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.

Custom Fields

Affiliates

This is optional. If included, only one affiliate access can be granted at a time. Additional requests will ADD new affiliate access but not remove the existing affiliate access. The value for this should be the Company Short Name from the company profile in DocBoss.

When configuring the field, External name should be set as "affiliate" and External namespace should be set as "urn:ietf:params:scim:schemas:extension:docboss:2.0:User".

Affiliate

Data type: string

Display name:

Variable name:

External name: affiliate

External namespace: urn:ietf:params:scim:schemas:extension:docboss:2.0:Use
r

Description:

Enum: Define enumerated list of values

Attribute required: Yes

Attribute type: Personal
 Group

Mutability: READ_WRITE

If Affiliate is not included in a request, the user will be given access to the affiliate with the smallest company ID (the original affiliate).

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="button" value="x"/>
<input type="text" value="Full"/>	Full	<input type="button" value="x"/>
<input type="text" value="Reviewer"/>	Reviewer	<input type="button" value="x"/>
<input type="text" value="View"/>	View	<input type="button" value="x"/>


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: Role1

Variable name: [Redacted]

External name: userType

External namespace: urn:ietf:params:scim:schemas:core:2.0:User

Description: [Empty field]

Enum: Define enumerated list of values

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

Attribute required: Yes

Attribute type: Personal Group

Mutability: READ_WRITE

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: [Dropdown menu]

Apply on: [Dropdown menu]

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.
