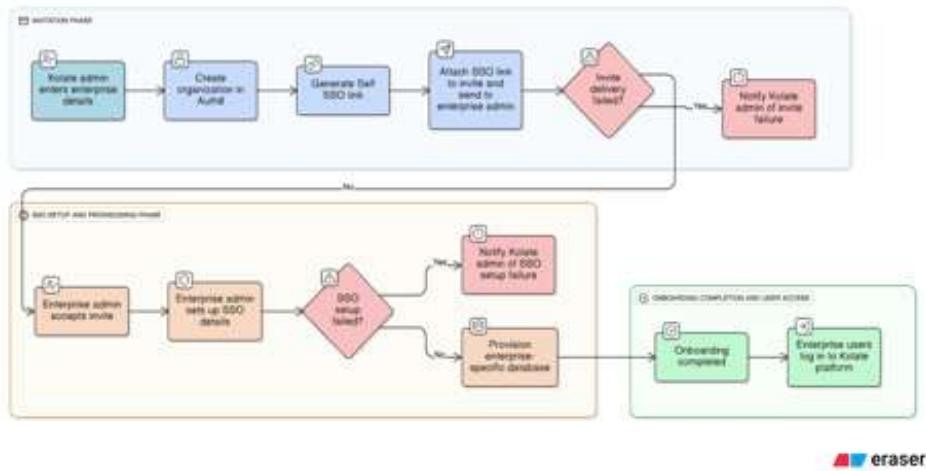


# Flow Diagrams

## Onboarding Flow



# Kolate Enterprise Onboarding & SSO Setup Workflow

## Overview

This document explains the end-to-end process for onboarding an enterprise organization to the Kolate platform with Single Sign-On (SSO) integration using Auth0.

The process is divided into three key phases:

1. **Invitation Phase**
2. **SSO Setup and Provisioning Phase**
3. **Onboarding Completion and User Access**

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## 1. Invitation Phase

### Objective

Initiate the enterprise onboarding process by creating an organization in Auth0 and sending the SSO setup invitation to the enterprise admin.

### Steps

- 1. Kolate Admin Enters Enterprise Details**
    - The Kolate admin inputs enterprise-specific information (e.g., organization name, domain, and contact email) into the admin interface.
  - 2. Create Organization in Auth0**
    - A corresponding organization entity is created in Auth0 to support SSO configuration and identity federation.
  - 3. Generate Self SSO Link**
    - Auth0 generates a self-service SSO configuration link for the enterprise admin.
    - This link allows the enterprise admin to set up their identity provider (IdP) details directly.
  - 4. Attach SSO Link to Invite and Send to Enterprise Admin**
    - The Kolate system automatically sends an invitation email to the enterprise admin containing the SSO setup link.
  - 5. Invite Delivery Validation**
    - The system verifies if the invitation email was successfully delivered.
    - **If delivery fails:**
      - The Kolate admin is notified of the invite failure via an alert or notification.
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## 2. SSO Setup and Provisioning Phase

### Objective

Allow the enterprise admin to configure SSO, validate setup success, and provision enterprise-specific resources.

### Steps

- 1. Enterprise Admin Accepts Invite**
  - The enterprise admin receives and accepts the onboarding invitation to begin the SSO setup process.
- 2. Enterprise Admin Sets Up SSO Details**
  - The admin enters necessary details such as:
    - IdP metadata or discovery URL
    - Certificate information
    - Attribute mappings (Name, Email, Roles)
  - The SSO connection is validated with Auth0.
- 3. SSO Setup Validation**
  - The system checks whether the SSO configuration was successful.
  - **If SSO setup fails:**
    - The Kolate admin is notified of the setup failure for manual troubleshooting.
  - **If SSO setup succeeds:**
    - The system proceeds to resource provisioning.

#### 4. Provision Enterprise-Specific Database

- A dedicated or logically separated database is provisioned for the enterprise to store tenant-specific data.
  - The provisioning includes:
    - Schema creation
    - Data isolation setup
    - Default configurations
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### 3. Onboarding Completion and User Access

#### Objective

Finalize onboarding and enable enterprise users to log in using their SSO credentials.

#### Steps

##### 1. Onboarding Completed

- Once SSO and database provisioning succeed, the system marks onboarding as complete.
- A confirmation notification can be sent to both the Kolate and enterprise admins.

##### 2. Enterprise Users Log In to Kolate Platform

- Enterprise users can now log in through the enterprise-specific SSO login page.
  - The authentication is managed via the configured IdP through Auth0.
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### Notifications and Error Handling

Scenario	Trigger	Action
Invite Delivery Failed	Email to enterprise admin fails	Notify Kolate admin
SSO Setup Failed	Error during enterprise admin setup	Notify Kolate admin
Onboarding Completed	SSO and database setup succeed	Notify enterprise and Kolate admin

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### Summary of Responsibilities

Role	Responsibilities
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<b>Kolate Admin</b>	Initiate enterprise onboarding, monitor invite and SSO setup status, respond to setup failures
<b>Enterprise Admin</b>	Accept invitation, configure SSO, verify login
<b>System (Kolate Platform)</b>	Automate Auth0 org creation, SSO link generation, invite delivery, and database provisioning

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## Outcome

Upon successful completion:

- The enterprise is fully onboarded to the Kolate platform.
- All enterprise users can authenticate via their organization's SSO.
- A separate, secure database instance ensures data isolation and compliance.