Okta Setup Guide

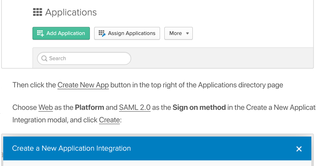
To configure SSO to log in to our application, you will need to create a **SAML 2.0 Integrated Application** inside your Okta Admin dashboard. This is typically performed by someone in IT or InfoSec who has administrative privileges to the Okta account.

Once you configure the application in your portal, you will need to return to us the **Federation Metadata XML** so that we can finalize configuration on our end.

Follow the steps below to create an application with information we've generated for your account, and be sure to return the Federation Metadata XML to us so your team can begin signing in with SSO.

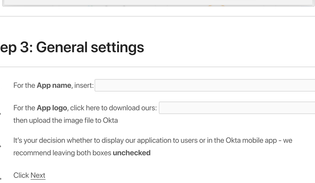
Step 1: Access Classic UI in Admin Portal

1. Log in to your Okta user account at your-domain.okta.com - you will need an account with administrator access to complete this process
2. Open the Admin dashboard by clicking on the Admin button in the top right
3. Switch into the Classic UI with the selector in the top left. You should have an Okta blue top navigation when in the Classic UI:

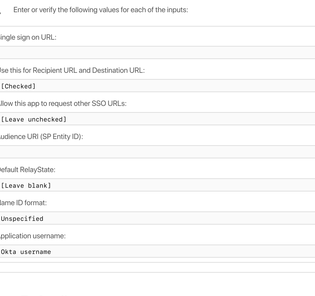


Step 2: Create a SAML 2.0 App

1. Click on Applications in the top navigation and then the Add Application button on the top left of the Applications page:



2. Then click the Create New App button in the top right of the Applications directory page
3. Choose Web as the **Platform** and SAML 2.0 as the **Sign on method** in the Create a New Application Integration modal, and click Create:



Step 3: General settings

1. For the **App name**, insert:
2. For the **App logo**, click here to download ours: then upload the image file to Okta
3. It's your decision whether to display our application to users or in the Okta mobile app - we recommend leaving both boxes **unchecked**
4. Click Next

Step 4: SAML Settings - General

1. On the Configure SAML step, locate the fields under **(A) SAML Settings - General**
2. Enter or verify the following values for each of the inputs:

Single sign on URL:

Use this for Recipient URL and Destination URL:

`[Checked]`

Allow this app to request other SSO URLs:

`[Leave unchecked]`

Audience URI (SP Entity ID):

Default RelayState:

`[Leave blank]`

Name ID format:

`Unspecified`

Application username:

`Okta username`

Step 5: Attribute statements

1. Okta's UI suggests this is an optional step, but it is **required** for your users to be be able to login to our service via Okta
2. Add the following attributes using the Add Another button:

Name:	Name format:	Value:
`id`	`Unspecified`	`user.id`
`email`	`Unspecified`	`user.email`

3. This section should look like this once you're finished:

4. Click Next to complete the initial SAML setup

Step 6: Feedback

1. Okta dumps you on a "Feedback" page to better understand their users. We don't need you to do anything here
2. None of the choices quite reflect what we are doing, but the quickest way to get through this form is to choose **I'm a software vendor. I'd like to integrate my app with Okta.**
3. Click Finish

Step 7: Download Identity Provider Metadata XML

1. From the previous step, you'll be taken to the Sign On tab for the Application we just created
2. Find the notice in the middle of the page that tells us **SAML 2.0** is not configured until you complete the setup instructions:

3. Our application **does** support **dynamic configuration**, and you'll need to download the Identity Provider metadata that is linked to here
4. Right-click (ctrl-click on Mac) on the Identity Provider metadata hyperlink and save the linked file to your computer
5. Return this file to us so we can finalize configuration on our end

Step 8: Assign Users

1. In order for your users to sign in to our application via Okta, you must assign them the application in Okta
2. Who gets access is up to you and your team, but we recommend first adding yourself, completing setup, and then adding more users once you confirm that SSO is working for your user account
3. Click the Assignments tab
4. Click Assign in the top left

5. We recommend choosing Assign to People and finding your own user account in the next modal, and clicking Assign. If you already have groups set up or know who will need to access this application, you can create assignments however you see fit.