

SSO and Provisioning Integration with Okta

Introduction

This guide describes how to configure user provisioning and SSO for Calven in Okta.

SSO enables users to authenticate to the Calven mobile app and Calven web app using their organisational username and password. SSO also supports any required multi-factor authentication such as validation apps or codes.

Automated provisioning allows organisations to automatically create, update and remove Calven user accounts based on changes in Okta. Organisations can choose to provide only selected users with Calven accounts or provision all accounts from their organisation.

Groups can also be provisioned into Calven from an organisation's Okta instance. Groups are used for teams and access control within Calven.

Supported protocols

Calven supports OpenID for SSO and SCIM 2.0 for automated provisioning.

Prerequisites

Ensure that you have the following before you start configuring Okta:

- An Okta account with admin privileges.
- A SCIM provisioning subscription for Okta. Contact your Okta representative to ensure your organisation has the appropriate subscription.
- A Calven account with admin privileges.

Procedure

Configuring Okta as the SSO provider for Calven

1. [Integrate your directory](#) with Okta
2. Configure OpenID authentication for Calven
 - a. In the Okta Admin Portal select *Applications->Applications* and then click on *Browse App Catalog*
 - b. Search for *Calven* and click *Add*
 - c. Edit the *General Settings* if required (We suggest keeping the defaults) and click *Done*
3. In the Calven Admin portal navigate to and enable Okta SSO
4. Proceed to *Configuring SCIM Provisioning with Okta*

Configuring SCIM Provisioning with Okta

SCIM Provisioning automates the management of users in Calven based on their Okta account. Provisioned users will be kept updated as their details in Okta are updated. If their application assignment is removed or their user is removed from Okta then they will be de-provisioned from Calven.

1. In the Calven Admin portal navigate to Integrations - SSO
 - a. Note your Calven ID - You will need this in step 4 below.
 - b. Click *Generate API Key* and copy this value - You will need this in step 5 below. **Note:** Once you navigate away from this screen you cannot access the key value again. You can generate a new key at any time. Ensure that you update the value in Okta if you do generate a new key.
2. Navigate to the *Calven* application in the Okta Admin Portal.
3. Select the *Provisioning* tab and click on *Configure API Integration* and select the *Enable API Integration* checkbox.
4. Enter the URL from step 1a into the *Base URL* field.
5. Enter the API Key from step 1b in the *API Token* field
6. click *Test API Credentials*.
7. If the test is successful proceed to *Assign People and Groups to Calven*. If your test is unsuccessful, double check the values you have entered and contact Calven support if the error persists.

Assign People and Groups to Calven

Before a user can sign in to Calven, they need to be assigned the Application in Okta. Assigning the app to a user will also trigger user provisioning into Calven.

1. In the Okta Admin Portal, go to the *Assignments* tab for the Calven app.

2. From the *Assign* drop down menu select *Assign to People* or *Assign to Groups*.
3. Click *Assign* next to the people or groups your want to assign Calven to. When you assign to a group all of the users in that group are assigned to Calven
4. Click *Done*. Okta will now begin to provision the assigned users to Calven.

Provision Groups to Calven

Calven uses group objects to represent teams and for access control purposes. To provision selected groups to Calven:

1. In the Okta Admin Portal, go to the *Push Groups* tab for the Calven app.
2. From the *Push groups* drop down select either *Find groups by name* or *Find groups by rule*.
 - a. If you selected *Find groups by name*, you can search for groups that you want to add to Calven
 - b. If you selected *Find groups by rule* you can create rules that automatically add groups to Calven. For example, you could create a rule for *Group name starts with 'Calven'*. This rule would automatically provision existing groups that match the rule as well as any new matching groups that are created later.

Close

Pushed Groups

All

Errors

By name

By rule

Calven Groups

Push groups by rule

Create a search rule that pushes any matching groups to Calven SCIM test automatically.

Rule name

Calven Groups

Group name

starts with

Calven

Group description

starts with

Enter string to match...

☒ Immediately push groups found by this rule

Create Rule

Cancel