

SSO Setup for Okta

1. Okta Configuration Instructions (from https://help.okta.com/en/prod/Content/Topics/Apps/Apps_Apps_Page.htm)

a. General

- i. Log into Okta as an Admin and go to your Dashboard
- ii. Click to the **Applications** dropdown
- iii. Choose **Applications**
- iv. Click **Add Application**
- v. Use the alphabetical navigation bar and the search and filtering tools to look for the **ClearCompany** application
- vi. Click **Add** next to this app
- vii. Enter the required information under **General Settings** then click **Next**
- viii. Configure the settings on the **Sign-On Options** page 1. Choose your sign on method - select **SAML 2.0**
 - a. Note: to prevent errors in your SAML Integrations, ensure that Okta is whitelisted for 3rd-party cookies in your browser! For details, see [here](#).
 2. Who sets credentials - Specify who sets the password and username credentials
 3. Default Username - choose the email address as the default username value when assigning the application to end users
- ix. Click **Done**

b. Assigning Users

- i. From the **Applications** page
 1. Search or scroll down to the application you want to assign to one or more people/groups
 2. Click the **Action** button drop-down menu
 3. Choose **Assign to Users** or **Assign to Groups** ii. From the Specific App
 1. From the **Applications** page, search or scroll down to the app you want to assign to one or more people/groups
 2. Click the individual app to view its page
 3. On the app specific page, click the **Assign** button
 4. Choose either **Assign to People** or **Assign to Groups** . An **Assign <app name> to People/Assign <app name> to Groups**

dialog appears listing available end users or groups who are not already assigned to the selected app

5. Click the **Assign** button next to each user or group for which you want this app assigned. For users, complete the **Attributes** page
6. Assign more users/groups, or click **Done**
 - a. Note: because assigning users to apps individually is not very scalable, we recommend that you assign apps to users based on group. For more information, see [Assigning Applications](#) or [Importing and Using Groups](#) in Okta

c. Necessary Information for ClearCompany

- i. Login URL - can be found from the Okta Admin Dashboard
- ii. X.509 Certificate - can be found from the Okta Admin Dashboard. Download this file.
- iii. *If you can find your Federation Metadata file - feel free to send this directly to ClearCompany. The URL and Certificate indicated above can both be parsed from this file.*

2. Testing

- a. Ensure that ClearCompany has received and processed your **Login URL** and the **x.509 certificate** (or federation metadata file).
- b. Your SAML connection will not work until ClearCompany has processed this information from you
- c. Ensure that you have user accounts in both Okta and ClearCompany that use the same email as the username
- d. You can create a test user, or you can use your own account if you choose
- e. Make sure you are logged out of ClearCompany
 - i. Identity Provider (Okta)-initiated login
 1. Log into Okta as an admin and give the test user access to the ClearCompany app in Okta (see step b above)
 2. Log into Okta as the test user
 3. Click the ClearCompany icon on your Okta dashboard
 4. If you are able to access ClearCompany, then this test is successful
 - ii. Service Provider (ClearCompany)-initiated login
 1. Ensure you are logged out of ClearCompany and Okta
 2. Navigate to [https://\[shortname\].clearcompany.com](https://[shortname].clearcompany.com)
 3. Once redirected, enter your Okta credentials and click **Submit**

4. If you have been logged into ClearCompany, then this test is successful

3. Things to Note

a. Usernames

1. In ClearCompany - the value we use for matching user identification is the Employee Username - this can be found by going to Tools → Setup → Users
2. In Okta - the value they use for matching user identification is the user's email address
3. In short, the email address entered for a user in Okta must be the same value as the ClearCompany Employee Username

ii. Email Links

1. If your team needs to access the system through email links - for example, an approval to an Offer Letter - this should still work. The user will click on the link and go through the authentication process and be brought right to the Offer Letter Approval Page
2. Some clients have reported that they have to click this link once to go through the authentication process, and then they must click it again to be brought to the Offer Letter page. This typically happens because some IdPs cannot properly pass on a RelayState. If this occurs, please check if your IdP allows passing a RelayState.