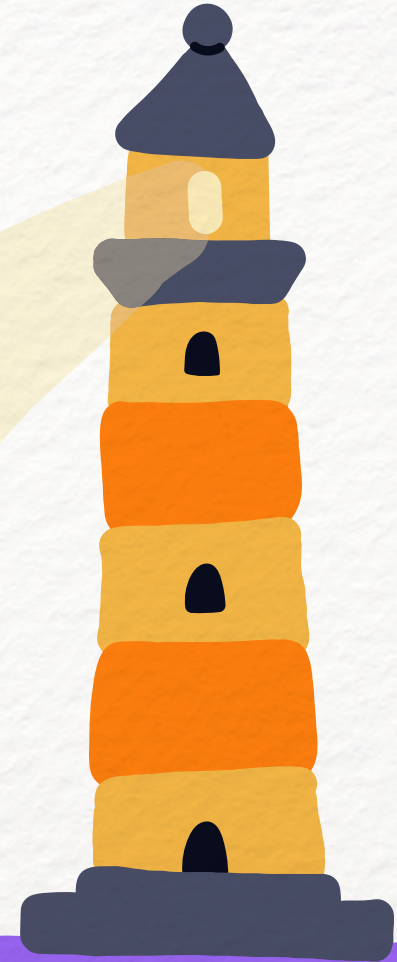


Single Sign On Configuration for Okta



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Disclaimer & Confidentiality Notice



1. Disclaimer & Confidentiality Notice

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Executive Summary



2. Executive Summary



This document provides guidelines on how to configure Workvivo to authenticate via Single Sign On (SSO) using Okta as the identity provider (IdP) solution in a SAML2 SSO configuration. The information contained in this document is intended as a guideline only – there may be significant differences in any given Okta configuration that require a different approach to be taken.

Create a New Application

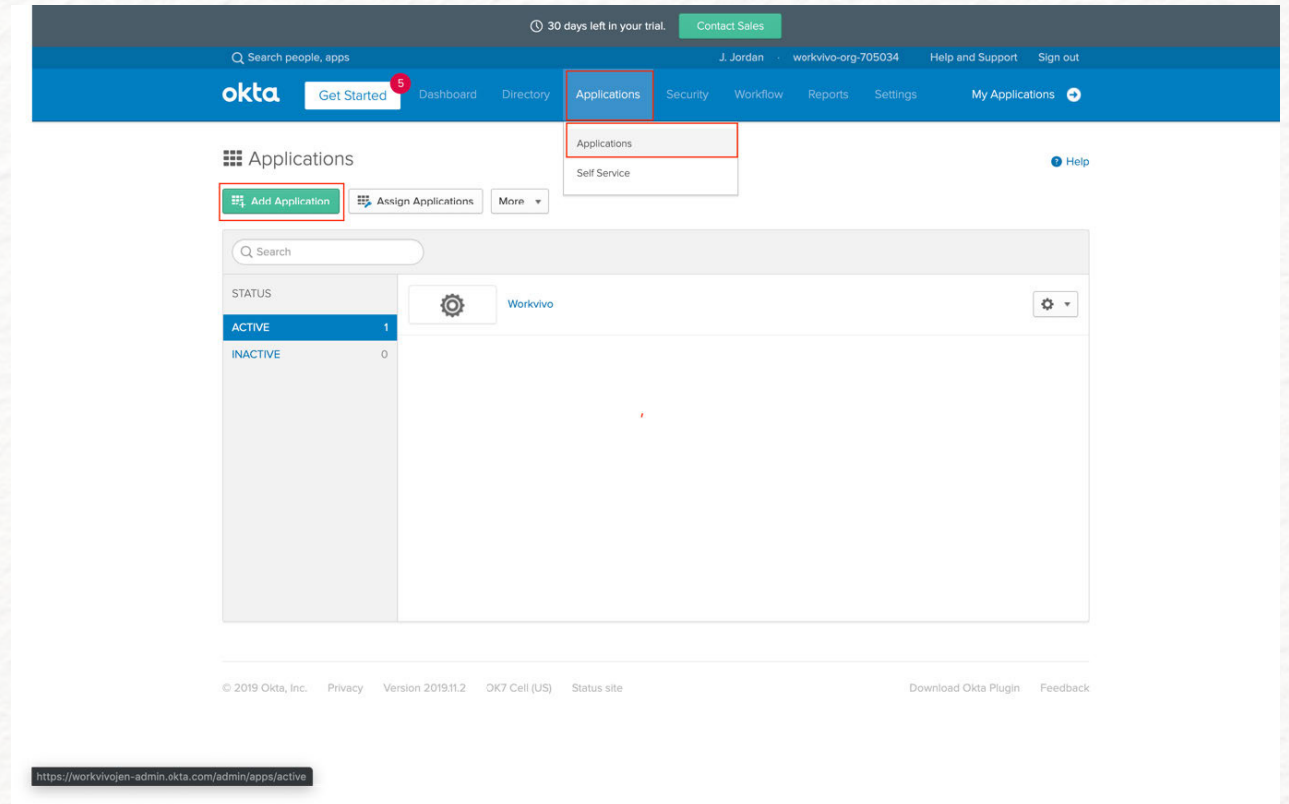


3. Create a New Application

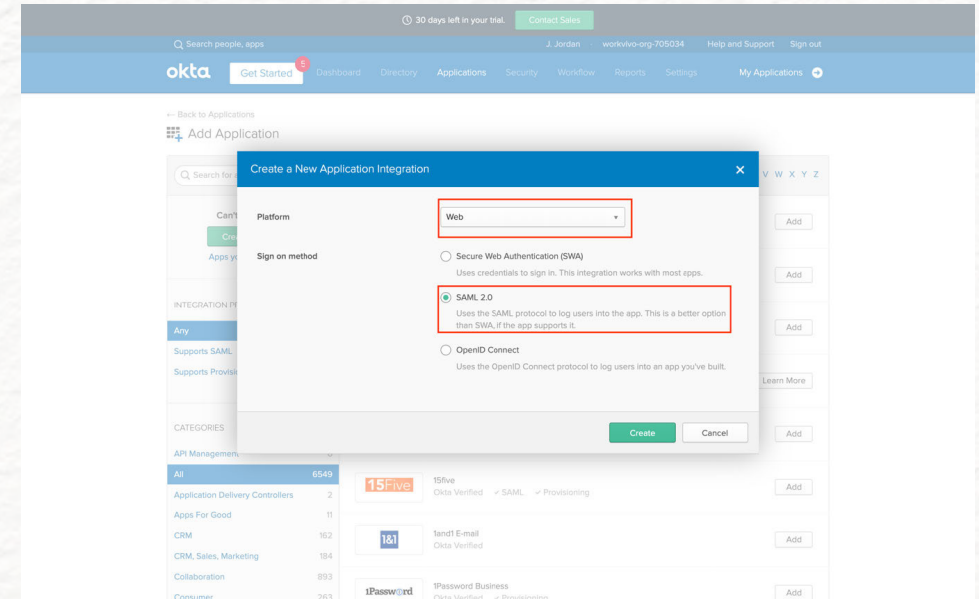
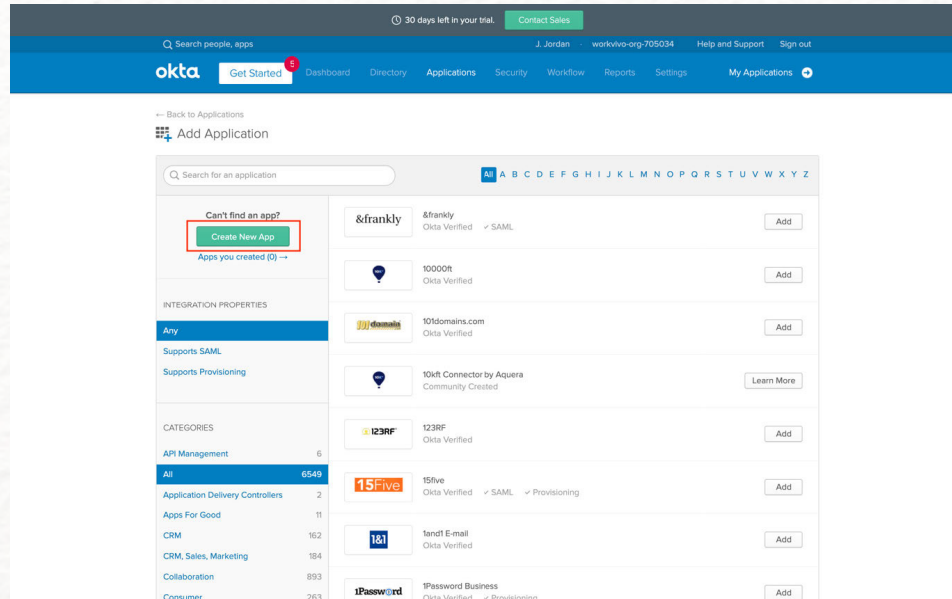
The first step is to create a new Workvivo Application.

From the Okta Admin console, go to Applications.

Click **“Add Application”** on the top left



Select “Create New App”



Create your new application integration.

Select:

- Web as the platform
- SAML 2.0 as Sign on method

Click “Create”

Give your new application a name and provide a logo if you wish.

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Create SAML Integration

1 General Settings 2 Configure SAML 3 Feedback

1 General Settings

App name

App logo (optional)  [Browse...](#)

[Upload Logo](#)

App visibility Do not display application icon to users Do not display application icon in the Okta Mobile app

[Cancel](#) [Next](#)

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Your Workvivo contact will provide you with the below information to set-up SAML

- ACS URL: `https://[companyname].workvivo.com/saml/acs`
- Entity ID: `https://[companyname].workvivo.com/saml/metadata`
- Name ID Format: EmailAdress
- Application username: Email

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Create SAML Integration

- General Settings
- Configure SAML
- Feedback

A SAML Settings

GENERAL

Single sign on URL

Use this for Recipient URL and Destination URL
 Allow this app to request other SSO URLs

Audience URI (SP Entity ID)

Default RelayState

If no value is set, a blank RelayState is sent

Name ID format

Application username

Update application username on

[Show Advanced Settings](#)

[LEARN MORE](#)

What does this form do?
 This form generates the XML needed for the app's SAML request.

Where do I find the info this form needs?
 The app you're trying to integrate with should have its own documentation on using SAML. You'll need to find that doc, and it should outline what information you need to specify in this form.

Okta Certificate
 Import the Okta certificate to your Identity Provider, if required.
[Download Okta Certificate](#)

[ATTRIBUTE STATEMENTS \(OPTIONAL\)](#) [LEARN MORE](#)

You can test the SAML configuration by choosing to Preview the SAML Assertion. Once complete please select **“Next”**

ATTRIBUTE STATEMENTS (OPTIONAL) [LEARN MORE](#)

Name	Name format (optional)	Value
<input type="text"/>	Unspecified	<input type="text"/>

[Add Another](#)

GROUP ATTRIBUTE STATEMENTS (OPTIONAL)

Name	Name format (optional)	Filter
<input type="text"/>	Unspecified	Starts with <input type="text"/>

[Add Another](#)

B Preview the SAML assertion generated from the information above

[<> Preview the SAML Assertion](#)

This shows you the XML that will be used in the assertion - use it to verify the info you entered above

[Previous](#) [Cancel](#) [Next](#)

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Complete Set-up

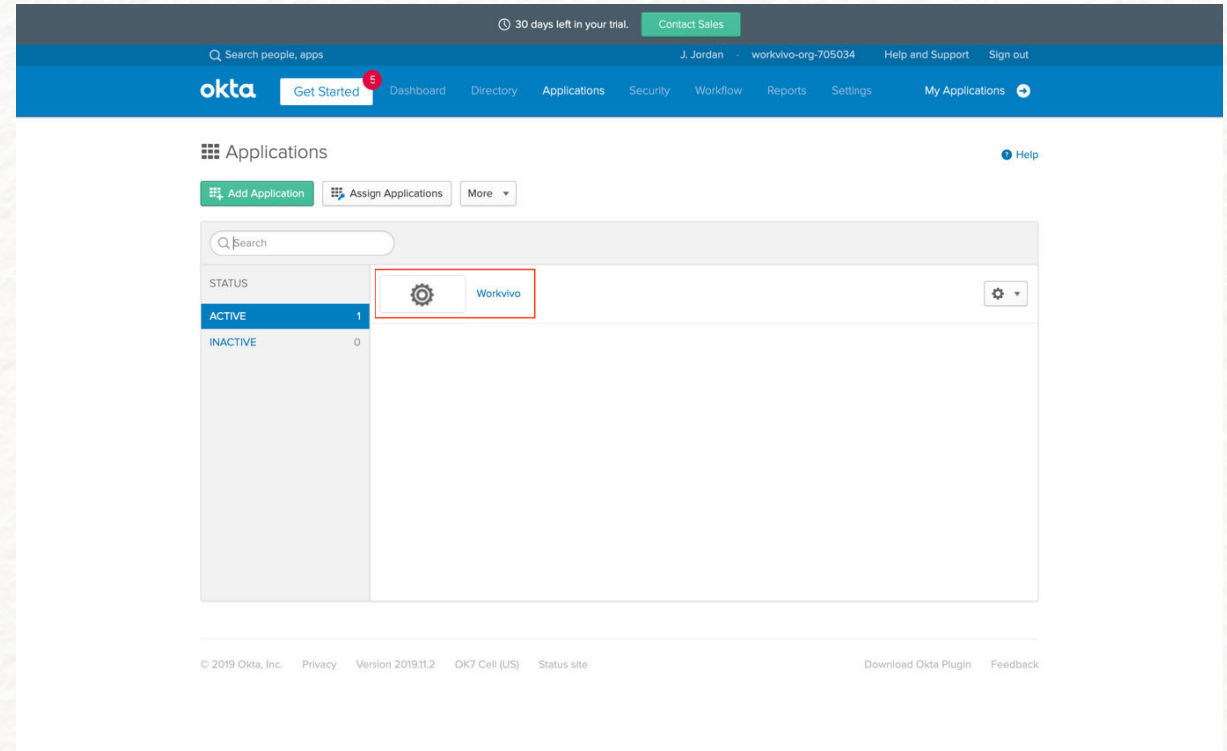


4. Complete Set-up

You will need to send the following information to your Workvivo contact:

- Identity Provider Single Sign-On URL
- Identity Provider Issuer:
- X.509 Certificate

To get this information simply go to Applications, select the new Workvivo application you have created, open the Sign On tab and click **“View Setup Instructions”**



The screenshot displays the Okta Applications management console. At the top, there is a navigation bar with the Okta logo, a search bar, and various menu items including Dashboard, Directory, Applications, Security, Workflow, Reports, Settings, and My Applications. A notification indicates '30 days left in your trial' and a 'Contact Sales' button is visible. Below the navigation bar, the 'Applications' section is active, showing a table of applications. The table has columns for 'STATUS' and a count. The 'ACTIVE' status has a count of 1, and the 'INACTIVE' status has a count of 0. A red box highlights the 'Workvivo' application in the 'ACTIVE' row, which includes a gear icon for settings. The footer contains copyright information for Okta, Inc. (© 2019), version 2019.11.2, and links for Privacy, Status site, Download Okta Plugin, and Feedback.

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← Back to Applications

Workvivo Active View Logs

General Sign On Import Assignments

Settings Edit

SIGN ON METHODS

The sign-on method determines how a user signs into and manages their credentials for an application. Some sign-on methods require additional configuration in the 3rd party application.

Application username is determined by the user profile mapping. [Configure profile mapping](#)

SAML 2.0

Default Relay State

SAML 2.0 is not configured until you complete the setup instructions.

[View Setup Instructions](#)

Identity Provider metadata is available if this application supports dynamic configuration.

CREDENTIALS DETAILS

About

SAML 2.0 streamlines the end user experience by not requiring the user to know their credentials. Users cannot edit their credentials when SAML 2.0 is configured for this application. Additional configuration in the 3rd party application may be required to complete the integration with Okta.

Application Username

Choose a format to use as the default username value when assigning the application to users.

If you select None you will be prompted to enter the username manually when assigning an application with password or profile push provisioning features.

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okta

How to Configure SAML 2.0 for Workvivo Application

The following is needed to configure Workvivo

- 1 Identity Provider Single Sign-On URL:
- 2 Identity Provider Issuer:
- 3 X.509 Certificate:


```
-----BEGIN CERTIFICATE-----
[REDACTED]
-----END CERTIFICATE-----
```

Turn on SSO to the Workvivo App



5. Testing SSO with Workvivo

The final step is to set-up the Sign On Policy for the Workvivo application. You can choose to grant all users access to the application or limit this to a specific group:

The image shows two screenshots from the Okta Admin Console. The top screenshot displays the SAML 2.0 configuration page, which includes a warning that SAML 2.0 is not configured until setup instructions are completed. Below this, there are sections for 'CREDENTIALS DETAILS' and 'Sign On Policy'. The 'Sign On Policy' section shows a table with one rule: 'Default sign on rule', which is active and not editable. Below the table, there are sections for 'CONDITIONS' and 'ACTIONS'. The 'CONDITIONS' section shows 'User assigned this app' with sub-options for 'Anywhere', 'Any client', and 'Any'. The 'ACTIONS' section shows 'Allow access'. The bottom screenshot shows the 'App Sign On Rule' configuration page. It includes a 'Rule Name' field, a 'Disable rule' checkbox, and sections for 'PEOPLE', 'LOCATION', and 'CLIENT'. The 'PEOPLE' section has 'Users assigned this app' selected. The 'LOCATION' section has 'Anywhere' selected. The 'CLIENT' section has 'About client access rules' link. There is also a 'Note' about the user-agent and a section for 'If the user's platform is any of these:' with checkboxes for Mobile (iOS, Android, Other mobile) and Desktop (Windows, macOS, Other desktop).

Verify SSO between Okta and Workvivo



6. Verify SSO between Okta and Workvivo

To test that SSO has been configured correctly:

- Open the single sign-on URL for Workvivo in your browser and you should be automatically redirected to the Okta sign-in page.
- Enter your sign-in credentials.
- Once authenticated, you should be automatically redirected back to the Workvivo app.



thank you



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