

How to Configure Okta - OIDC for Streamline AI

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Supported Features

The Okta/Streamline AI Okta OIDC integration currently supports the following features:

- Service Provider (SP)-Initiated Authentication (SSO) Flow
- Identity Provider (IDP)-Initiated Authentication (SSO) Flow

For more information on the listed features, visit the [Okta Glossary](#).

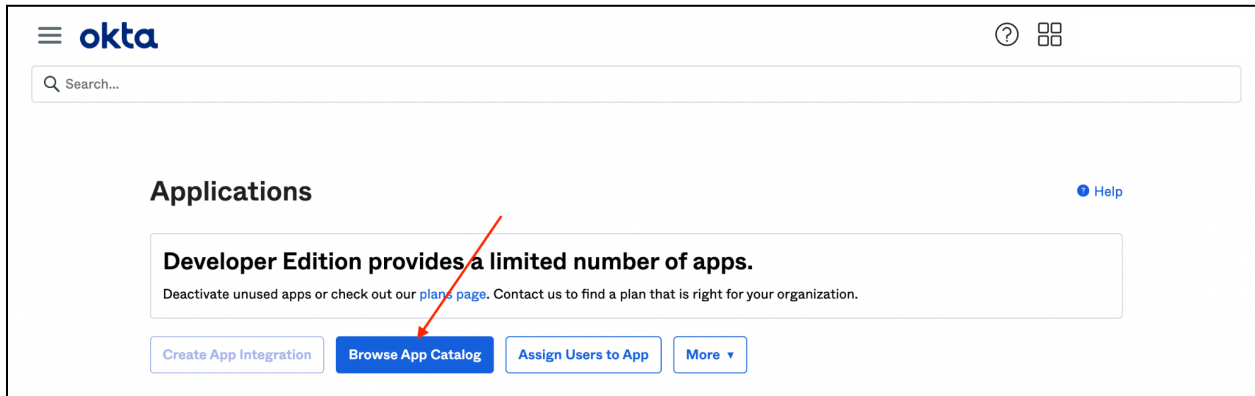
Requirements

Contact Streamline AI support to enable Okta integration for your account.

Configuration Steps

Okta Admin Setup Instructions

- 1) Login to Okta Admin and select **Browse App Catalog**



2) Search for and select **Streamline AI**. Click **Add Integration**, then click **Done**.

The screenshot shows the Okta Applications Catalog interface. At the top, there is a search bar and a breadcrumb trail: Applications > Catalog > Private Apps > Streamline AI. A red arrow points to the 'Add Integration' button, which is located next to the text 'Last updated: August 31, 2022'. Below this, the 'Streamline AI' application card is displayed, featuring a blue 'S' icon and a 'SCIM' tag. Underneath the card, there are two sections: 'Okta Verified' with a heart icon and a description stating the integration was either created by Okta or by Okta community users and then tested and verified by Okta; and 'Overview' which states it enables Streamline AI customers to authenticate using Okta OIDC as a single sign-on provider. At the bottom, there is a 'Use Case' section with a link to 'Private Apps'.

The screenshot shows the 'Add Streamline AI' configuration page. At the top, there is a search bar and a breadcrumb trail: Applications > Catalog > Private Apps > Streamline AI. A red arrow points to the 'Add Integration' button. Below this, the 'Add Streamline AI' section is displayed, featuring a blue 'S' icon. Underneath, there is a 'General Settings' tab. The 'General settings - Required' section contains two fields: 'Application label' with the value 'Streamline AI' and a description 'This label displays under the app on your home page'; and 'Application Visibility' with two checkboxes: 'Do not display application icon to users' and 'Do not display application icon in the Okta Mobile App'. At the bottom of the 'General Settings' section, there are 'Cancel' and 'Done' buttons. A red arrow points to the 'Done' button. To the right of the 'General Settings' section, there is a 'General settings' section with the text 'All fields are required to add this application unless marked optional.'

3) Select the SignOn tab

The screenshot displays the Okta Admin Console interface for the 'Streamline AI' application. At the top, the Okta logo and a search bar are visible. Below the application name, there are tabs for 'General', 'Sign On', 'Assignments', and 'Okta API Scopes'. The 'Sign On' tab is selected and highlighted with a red underline. A red arrow points to the 'Sign On' tab. The 'Sign On' tab contains a 'Settings' section with a 'Sign on methods' subsection. Under 'Sign on methods', there is a radio button labeled 'OpenID Connect' which is selected. To the right of the 'Sign On' tab, there is an 'About' section with text explaining that 'OpenID Connect allows users to sign-on to applications using the OpenID Connect protocol.' Below the 'Sign On' tab, there is a 'Token Credentials' section with a 'Signing credential rotation' dropdown set to 'Automatic' and an 'Edit' link.

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Streamline AI

Active View Logs

General **Sign On** Assignments Okta API Scopes

Settings

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](#)

☒ OpenID Connect

About

OpenID Connect allows users to sign-on to applications using the OpenID Connect protocol.

Token Credentials [Edit](#)

Signing credential rotation Automatic

- 4) In a new tab or browser window navigate to your Streamline AI instance and login with your **Streamline AI Admin** account.

*Contact Streamline AI if you do not have your instance URL

Streamline^{AI}

Don't have an account? [Sign up](#)

Welcome to Streamline AI

Email *

Password *

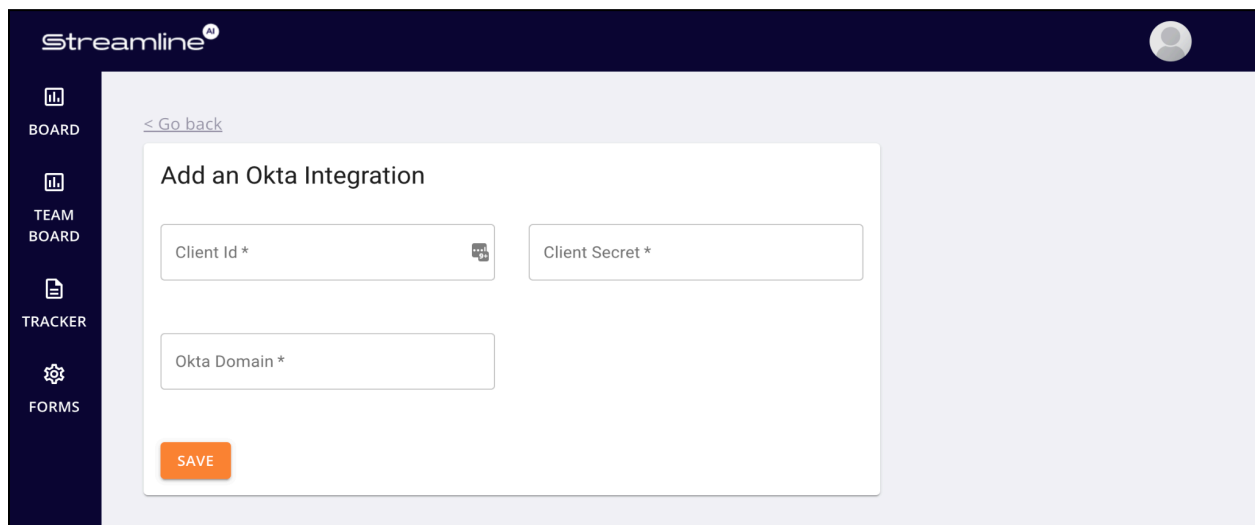
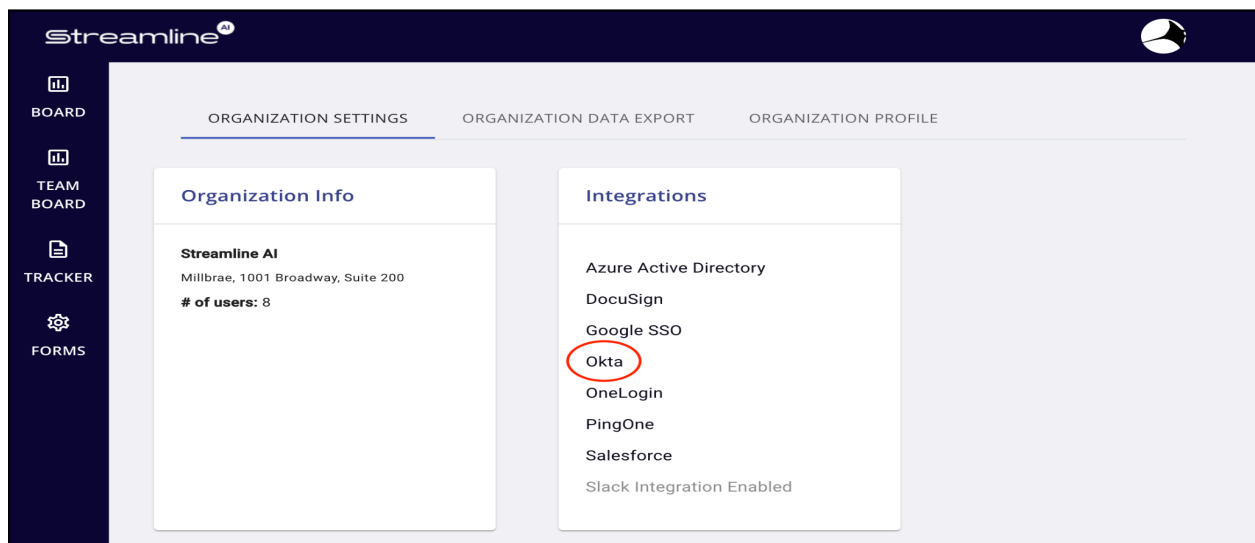
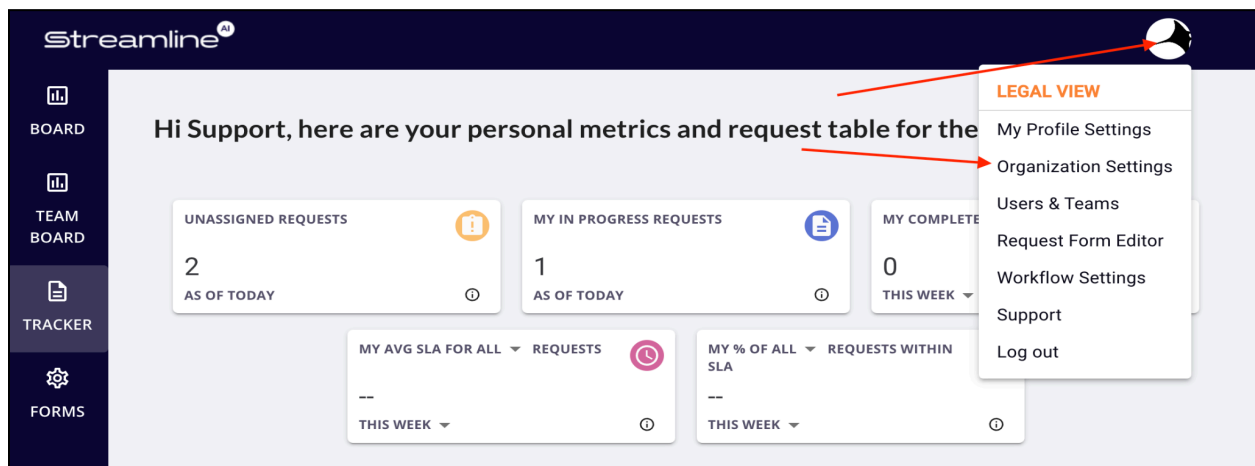
SIGN IN

[Forgot Password](#)

[Sign in with Slack](#)



5) Go to **Profile > Organization Settings** , then in **Integrations** click the **Okta** integration tile.



6) Return to the Okta Admin browser window from step 3 and copy the **Client Id** and **Client Secret**.

Okta Domain is your Okta subdomain or the URI for this page in Okta.

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Streamline AI

Active ▾[View Logs](#)[Monitor Imports](#)

General

Sign On

Mobile

Provisioning

Import

Assignments

Okta API Scopes

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](#)

☒ OpenID Connect

Client ID



Public identifier for the client that is required for all OAuth flows.

Client secret



Secret used by the client to exchange an authorization code for a token. This must be kept confidential! Do not include it in apps which cannot keep it secret, such as those running on a client.



OpenID Connect is not configured until you complete the setup instructions.

[View Setup Instructions](#)

OpenID Provider Metadata is available if this application supports dynamic configuration.

About

OpenID Connect allows users to sign-on to applications using the OpenID Connect protocol.

You can sync passwords to this app

If you enable provisioning and password push, you can automatically synchronize Okta passwords to Streamline AI.

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.

- 7) Obtain the **Streamline URL** and **Streamline ID** from the resulting Streamline AI Okta integration page.

The screenshot shows the Streamline AI Okta integration page. The browser address bar shows the URL `https://sub%20domain.streamline.ai/integrations/okta`. The page has a dark blue header with the Streamline logo and a navigation sidebar on the left with links for BOARD, TRACKER, and FORMS. The main content area is titled 'Your integration with Okta' and contains the following fields:

- Okta Domain: [text input]
- Client Id: [text input]
- Client Secret: [text input with masked characters]

Below these fields is an 'EDIT SETTINGS' link. The 'Complete the integration' section contains the following fields:

- Sign-in redirect URI: [text input] (Enables sign on via Okta)
- Initiate login URI: [text input] (Enables sign on via the Streamline AI icon in Okta)
- Streamline AI ID: [text input with value 63606649cb747b77eecac185] (Streamline AI ID used in Okta configuration)

8) Return to the Okta Admin window. Click **Edit** and add the **Sub Domain** and **Streamline AI ID**

Contact Streamline AI support to configure your **Streamline AI Sub Domain**.

Obtain your **Streamline AI ID** from the Okta configuration page in step 7

The screenshot shows the Okta Admin console interface. At the top, there's a navigation bar with the Okta logo and a search bar. Below the navigation bar, there are tabs for General, Sign On, Mobile, Provisioning, Import, Assignments, and Okta API Scopes. The 'Sign On' tab is selected.

The main content area is titled 'Settings' and includes a 'Cancel' button. It contains several sections:

- Sign on methods:** This section explains that the sign-on method determines how a user signs into and manages their credentials. It mentions that some methods require additional configuration in the 3rd party application. A link 'Configure profile mapping' is provided. A message states: 'OpenID Connect is the only sign-on option currently supported for this application.'
- OpenID Connect:** This section is selected with a radio button. It contains two input fields: 'Client ID' and 'Client secret'. The 'Client ID' field has a placeholder text: 'Public identifier for the client that is required for all OAuth flows.' The 'Client secret' field has a placeholder text: 'Secret used by the client to exchange an authorization code for a token. This must be kept confidential! Do not include it in apps which cannot keep it secret, such as those running on a client.'
- OpenID Connect is not configured until you complete the setup instructions.** This section includes a 'View Setup Instructions' button and a link to 'OpenID Provider Metadata'.
- Advanced Sign-on Settings:** This section explains that these fields may be required for a Streamline AI proprietary sign-on option or general setting. It contains two input fields: 'Streamline URL' and 'Streamline AI ID'. The 'Streamline URL' field has a placeholder text: 'Enter your Streamline URL. For example, if your login URL is https://sso.streamline.ai/, enter: https://sso.streamline.ai'. The 'Streamline AI ID' field has a placeholder text: 'Please enter your Streamline AI ID. Refer to the Setup Instructions to obtain this value.'
- About:** This section provides information about OpenID Connect, stating that it allows users to sign-on to applications using the OpenID Connect protocol. It also mentions that you can sync passwords to this app if you enable provisioning and password push, and that you can automatically synchronize Okta passwords to Streamline AI. It also explains that you can choose a format to use as the default username value when assigning the application to users, and that if you select 'None', you will be prompted to enter the username manually when assigning an application with password or profile push provisioning features.

Notes

Service Provider (SP)-Initiated Authentication

- 1) Click Sign in with Okta

