Configuring Okta Provisioning for Happeo

This guide provides the steps required to configure Okta Provisioning for Happeo. Happeo supports synching your users and groups from Okta using the SCIM Provisioning protocol (System for Cross-domain Identity Management) that Okta offers. To learn more about how Okta works with SCIM, please see this article.

If you have feedback related to our testing process or suggestions on how this can be improved or any other remarks, please feel free to reach out to our support team.

Features

The following features are supported by Happeo at the moment.

- Create users
  - Create or sync a user in Happeo when assigning the app to a user in Okta.
- Update user attributes
  - If a user's attributes are updated in Okta, they will also be updated in Happeo.
- Deactivate users via Okta sync
  - Deactivates a user's Happeo account when the user is unassigned from the Happeo app in Okta or their Okta account is deactivated. Accounts in Happeo can be reactivated if the user is assigned back to the Happeo app in Okta.
- Push Groups: Groups and their users in Okta can be pushed to Happeo. Groups synched from Okta can be used to set Page and Channel creation permissions. These groups can also be added as Channels or Pages members.

Provisioning to App   Cancel

Create Users   ☑ Enable

Creates or links a user in Happeo when assigning the app to a user in Okta.

The default username used to create accounts is set to **Okta username.**

Update User Attributes   ☑ Enable

Okta updates a user's attributes in Happeo when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in Happeo.

Deactivate Users   ☑ Enable

Deactivates a user's Happeo account when it is unassigned in Okta or their Okta account is deactivated. Accounts can be reactivated if the app is reassigned to a user in Okta.

Requirements

Okta Provisioning is only included with Happeo's Recommended and Custom packages. Reach out to your CSM if you would like to upgrade your Happeo package.

Prerequisites

To enable Okta Provisioning, you will first need to create your happeo instance using a google user account tied to your organisation. To find out how to create an organisation please see the article here. Please **note** that you will need to be logged in with an administrator account.

Configuration instructions

1. Verify your domain.
   - Go to Admin Settings in the top-right corner.
   - Click on Security -> Domain Verification and add your company domain there. Please note it can take up to 48 hours for the DNS settings to propagate and hence your domain to be verified by us
   - Once the TXT record has been made, make sure to log in to your DNS provider account and add a new TXT record for the domain you're verifying with the value provided

Domain verification

We are going to verify the ownership of your domain using a TXT record. The domain you are saving and verifying will be used to match the email addresses for the users and groups you are provisioning to Happeo.
Please note: it can take up to 48 hours for the DNS changes to propagate.

Domain name

happeo.com

Continue

We have created a TXT record for you!

Log in to your DNS provider account and add a new TXT record for the domain you're verifying with the value below.

TXT record

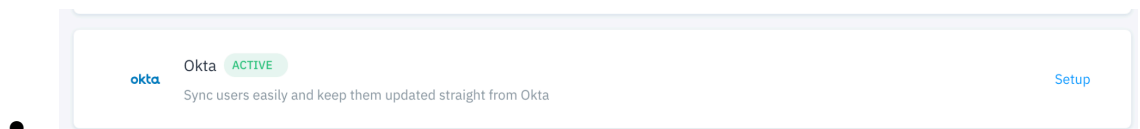happeo-site-verification=3cc2682957a04b49a

Once the DNS changes propagate our background process will verify your domain.

Cancel   OK

2. Activating Okta Provisioning and obtaining credentials from Happeo to add into Okta.

   - Go to Admin Settings in the top-right corner.
   - Click on Integrations
   - Click the Setup button for the Okta Provisioning item.

   okta   Okta ACTIVE   Setup
             Sync users easily and keep them updated straight from Okta

   - You will be prompted with a set of credentials needed on the Okta's side setup.

okta

Okta Sync

Step 1: Go to Domain Verification and verify your domain.

Step 2: Once step 1 is complete, open your Okta environment and use the following credentials as your Happeo integration provisioning settings:

Base URL

https://provisioning-connector.happeo.com/scim/v2

API Token

eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhdWQi

API Token

Close

3. Install the Happeo Application in Okta
   ● In the Admin Console, go to **Applications > Applications**.

okta   Q Search...

Dashboard   ∨
Directory   ∨
Customizations   ∨
Applications   ∧
  Applications
  Self Service
Security   ∨

⠿ Applications

Developer Edition provides a limited number of apps.

Deactivate unused apps or check out our plans page. Contact us to find a plan that is right for your organization.

[Create App Integration] [Browse App Catalog] [Assign Users to App] [More ▾]

Q Search

● Click **Browse App Catalog** and search for **Happeo.**
● Click Add and Done. This will create the integration.
● After the integration is created, click on the **Provisioning** tab and, in the main panel, click **Configure API Integration**. Check the **Enable API Integration** check box.
● Enter the base URL and the API token received from Happeo Admin Panel from step 2.

- Click **Test API Credentials** to test whether the Okta integration can connect to our SCIM API. If successful, you will see a message: "Happeo was verified successfully!". Press Save in the bottom-right corner.

Integration   Cancel

| ✓ | Happeo was verified successfully! |

☑ **Enable API integration**

Enter your Happeo credentials to enable user import and provisioning features.

Base URL

https://provisioning-connector.happeo.com/scim/v2/8d8a79f4-4

API Token

●●●●●●●●●●

Test API Credentials

Save

4. Setup SAML SSO login
   - Happeo supports SAML SSO SP initiated, which means the login needs to start from within the Happeo login page.
   - You will need a custom login page with SAML login enabled. Contact Happeo customer support.
   - Go to **Okta -> Applications -> Sign on** page and open up the **Identity provider metadata** link. Open **Happeo->Admin Console ->Security-> Single sign-on settings.** You will have 2 fields to fill in.
     - Copy the url of the **Identity provider metadata link** into the SAML metadata url
     - Copy the entityID into the SAML entity id

dev-********.okta.com/app/****?****04=****?sso/saml/metadata

loes not appear to have any style information associated with it. The document tree is shown below.

escriptor xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata" entityID="http://www.okta.com/
Descriptor WantAuthnRequestsSigned="false" protocolSupportEnumeration="urn:oasis:names:
escriptor use="signing">
Info xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
509Data>
X509Certificate>MIIDqDCCApCgAwIBAgIGAXdoyCP8MA0GCSqGSIb3DQEBCwUAMIGUMQswCQYDVQQGEwJVUz
GA1UECwwLU1NPUHJvdmlkZXIxFTATBgNVBAMMDGRldi0yODg1ODUwMzEcMBoGCSqGSIb3DQEJ ARYNaW5mb0va
GEwJVUzETMBEGA1UECAwKQ2FsaWZvcm5pYTEWMBQGA1UEBwwNU2FuIEZyYW5jaXNjbzENMAsG A1UECgwET2t0Y
GCSqGSIb3DQEJARYNaW5mb0Bva3RhLmNvbTCCASIwDQYJKoZIhvcNAQEBBQADggEPADCCAQoC ggEBAMREo3RN3
Pvir1RVWAhG8xr5rbadKlL9C9CB88ljtBxm4dKuqeb13Io7bswIsidwrFSy1Jrs1XGyfvLaNY C5ivJV0Ls9UAi
G/ATuKg0JAF6Gfwj1lJl0iOGYV79/hEghaO3wLnMpAD2hfPCBVrigkmfpgntyA7+KQv8KmBCl zMrlwNzQ8zzpi
IQEkiO3KtG7QiTyDfNwdIOm26t1kgKnFXJLy5fWO5j1UAgGCHvnDQ+217YowdHB/Qqf00z9VV Ve9bcik7hdRfa
wlqP7fH74NGbHQLGQ4+SmIhmo9Vx+TZuxVQgYQ7JdZD/ei9eNHdSKeTJJ8ykuJ53Mo4983Qjs zj6zgzZ2zj+ZO
X509Data>
yInfo>
Descriptor>
IDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
IDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress</md:NameIDFormat>
eSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST" Location="http
eSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect" Location="
ODescriptor>

Security

IP address whitelist   Custom Privacy Policy   **Single sign-on settings**

Single sign-on settings

Manage your single sign-on settings.

SAML metadata url
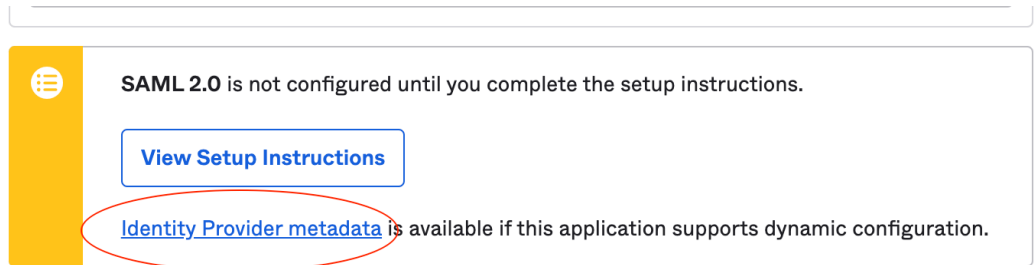
https://dev-********.okta.com/app/exk3nd04?

SAML entity id

http://www.okta.com/exk3nd04?3L8Da..?su7

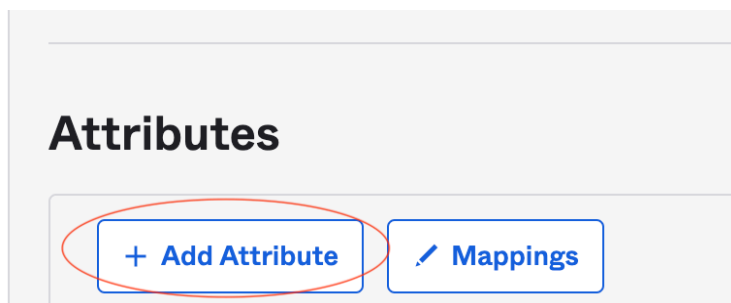Last updated on 14 February 2022 18:21 by isvroxana@gmail.com

Save

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**

-

5. *Optional Setting up the manager id relation to enable the Happeo Organisational Chart.*

In your Okta User Profile, if the manager ID field is populated **with the user's Okta id or with the user's email**, the manager will be automatically provisioned in Happeo and you can see this relation under the Happeo Organisational Chart.

If the manager ID field is not populated in your Users Profile and you want to provision the field in Happeo, in Okta, in your Users Profile, you will need to add a custom attribute to the User Profile. Go to Okta, **Profile Editor -> User** and click on **Add attribute.**

Attributes

+ Add Attribute   **✎ Mappings**

Add Attribute

Data type

linked object ▾

Display name ❓

Manager

Variable name ❓

Manager

Description

The user's manager

Save   **Save and Add Another**   **Cancel**

Press **Save Attribute**.

Then go to the User Profile page for each of the users and edit the Manager field by selecting a manager user.

Manager
manager

Okt

Oktavian Andrei Iulius Augustus
(**okt**avianaugustus@**okt**aforlife.com)

In the Okta Profile Editor in Happeo, you will see a custom property called managerId. This is mapped in **Mappings** as described below:

```
user.getLinkedObject("manager").getInternalProperty(
```
▾   ➝ ▾   managerId   string

6. On the **Assignments** tab, add users to the app integration. Make sure the users you assigned have all properties filled in.

Note: When assigning a user to Happeo, a modal will pop up with all the properties of that user. These properties will also appear in Happeo, so, please check if any properties are empty

Another Note: You can also assign groups to the Happeo app. This means **all users in that group** will be synchronised into Happeo, **but not the group themselves.** In other words, when you need to assign many users to Happeo, you can assign an entire group that will sync all the users to Happeo, however, you don't necessarily need to have the group itself in Happeo
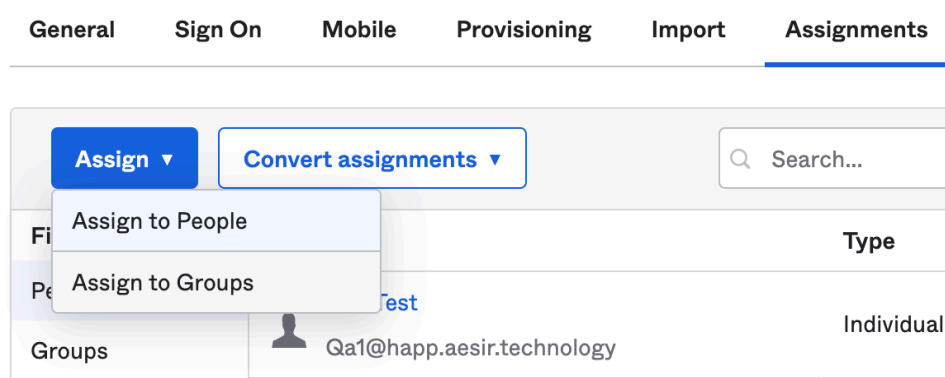
7. Provisioning groups from Okta to Happeo using Okta's **Push Groups** feature.

First, **make sure that all users that are part of the groups you want to provision to Happeo are already assigned to the Happeo app, as described at step 5.**

Then, on the **Push Groups** tab, add the groups (either by name or by rule) that you want to provision in our app.

Push Groups to Happeo

8. Click on the **Sign On** and click **Edit.**

    ● Under Application user name format choose email. Press save.

9. Verify everything works as expected in Happeo.

    ● You should be set up and the users and groups you assigned should be provisioned. Check Happeo → **Admin Settings**, **Users Management** and **Group Management** tabs to see them.

- Also check the **People** section → search and navigate through users profiles making sure that the needed information is filled in. Check the **organisation chart**.
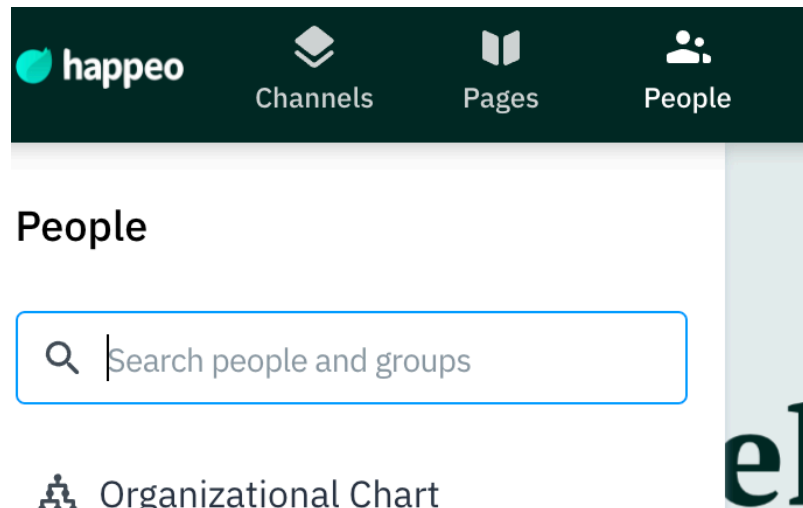
- In the Group Management tab, also check the **Permissions** settings (click on a Group's three-dot menu on the far-right of each listed group's row), change permissions for page and channel creation as needed and verify that permissions work as expected.

Group permissions

☑ Can create channels
☑ Can create pages

Cancel   Ok

Extra observations related to Okta SCIM Provisioning

Users provisioning

- **Deactivating** a user in Okta automatically un-assigns the user from the Happeo app.
- **Reactivating does not** send ANY request to us. Reassigning the user **does** send us an activation request.
- **Suspending** an **active, assigned to app user**, **does not** send ANY request to us. The user remains assigned to the app.
- **Unsuspending** an assigned to app user **does not** send ANY request to us.
- **Deleting** a user **does not** send ANY request to us. (**Note**: Only **deactivated** users can be **deleted**).
- There is a setting related to Deactivating users. If you disable that, then Happeo will not get an active: false patch request when a user is deactivated. So don't deactivate that.

Deactivate Users   ☑ Enable

Deactivates a user's Happeo account when it is unassigned in Okta or their Okta account is deactivated. Accounts can be reactivated if the app is reassigned to a user in Okta.

Groups provisioning

- The Okta ID comes as an external ID when provisioning users, but **not** when provisioning groups. Therefore, we can only rely on the display name of the group and your customer ID to uniquely identify groups.
- At the moment, **custom group attributes cannot be provisioned**. Only the group name and members. This is something that we have verified with Okta support and they plan to add support for this, but no ETA yet. Therefore attributes like group's email, we cannot provision. The Happeo workaround as we require emails to be present for groups, is to generate a **no-reply-group-name-random-string** group email for your groups. These will be updated, once we will be able to receive custom group attributes from Okta
    - Note: The email is autogenerated by Happeo. If your groups have an email set in Okta and you sync that group to Happeo, the group will have another email in Happeo. For instance, something like *no-reply-groupName1234567@happeo.com*
- **Only users that have been assigned to the application are sent as members of a push group**. For example, if you have a group with 2 members and only one of them is assigned to the app connected to Happeo, we will receive only that member as being part of the group. Therefore, in Happeo, your group will only have 1 member.
- **Deleting a member from the group, does not make Okta send Happeo an update. Only clicking on Push Groups - *group name* - Push now sends us the update.**
- When a group from Push Groups is deleted from Directory → Groups, a DELETE request is sent to us.

- When a group from Push Groups is Unlinked, there are 2 options. Please use the recommended one.

General   Sign On   Mobile   Provisioning   Import   Assignments   **Push Groups**

Push Groups to Happeo

| Push Groups ▾ | ⊞ Refresh App Groups | ✎ Bulk Edit | ⚙ | 🔍 Search... |

Pushed Groups	**Group in Okta**	**Group in Happeo**	**Last Push**	**Push Status**
All	⚫ Lala-qa5-group6 No description	☐ Lala-qa5-group6 No description	Jan 31, 2022 7:28:34 AM	Active ▾
Errors	⚫ PR-group-1 No description	☐ PR-group-1 No description		
By name				
By rule	⚫ Roxies No description	☐ Roxies No description		
Lala	⚫ test-rox No description	☐ test-rox No description		
Startswith	⚫ test1-qa3-group123 No description	☐ test1-qa3-group No description		
	⚫ test1-qa4-group	test1-qa4-group	Jan 28, 2022	

👥 Deactivate group push

Stop pushing group memberships. Existing memberships are unaffected.

⛔ Unlink pushed group

Stop pushing group memberships and optionally delete the pushed group.

🔄 Push now

Push this group's memberships to Happeo

✕

Unlink Pushed Group

What do you want to do with this group?

No user accounts are deleted with either option

🔘 **Delete the group in the target app (recommended)**

Delete the group in the target app. User accounts will not be deleted.

⚪ **Leave the group in the target app**

Okta stops pushing memberships and the group remains in the target.

Unlink   Cancel

Troubleshooting

Happeo does not automatically log out a user that was unassigned from Okta, but as soon as the user tries to perform any action on the website, it will log them out with an error message about an inactive session.