Logging in with Single Sign-On (SSO) through Okta

Only admin users can configure a default Identity provider to enable Single Sign-On (SSO). This document details how to configure Okta as an optional Identity Provider to facilitate SSO with the Tabled application.

Supported Features

- Service Provider (SP) - Initiated Authentication (SSO) Flow.
  This authentication flow occurs when the user attempts to log in to the application from Tabled.
- Automatic account creation in Tabled on initial SSO.
  This is automated only when the user received an invitation from a Tabled workspace that has previously configured Okta.

Requirements

In order to proceed with configuring login with SSO through Okta, you must:

- Have access to an Okta tenant
- Be an Okta administrator to that tenant
- Have a Tabled administrator account

Configuration Steps

The following shows the configuration for setting up the OIDC integration between Tabled and Okta. Okta is the Identity Provider (IDP) and depending on the use case, the user will be redirected to Okta for authentication if no session has been established.
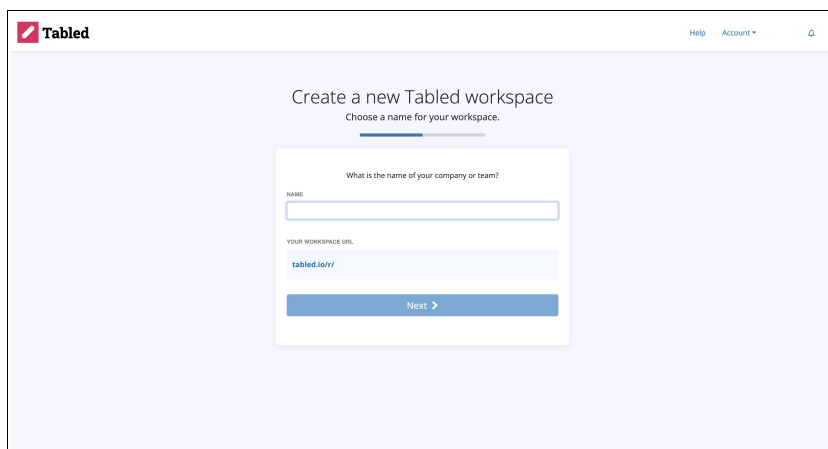
To configure your provisioning settings for Tabled in Okta, there are three main steps to follow:

Step One - Setup a workspace in Tabled

1. Click on **Sign in with email** in Tabled's login page (https://tabled.io/login) and enter your credentials to log in.
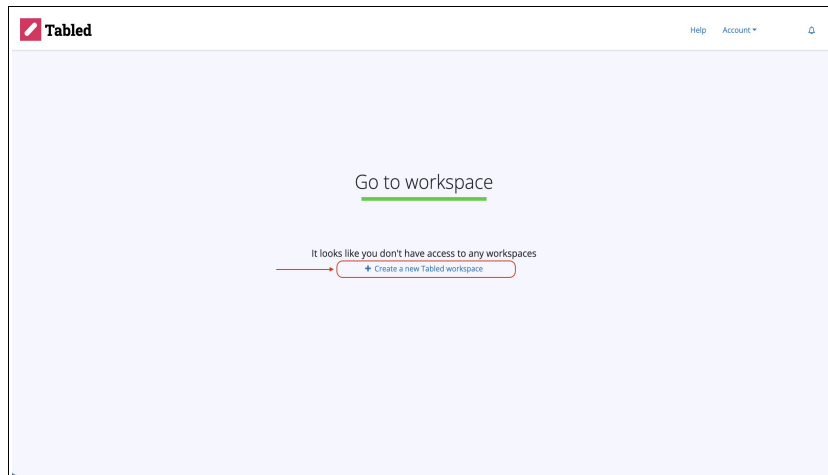
2. In the first screen, you will be given the option to create a new workspace by clicking on **Create a new Tabled workspace.**

3. In the next screen, provide a name for the workspace and click **Next.**

4. Follow all the instructions to complete the setup until you are in the last screen where you will be prompted with the option to enable/disable organisation email access. Once you are done, click **Go to your workspace**.
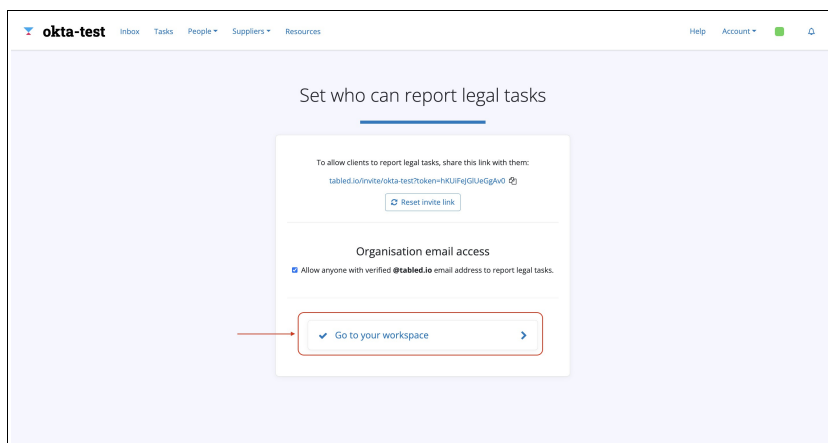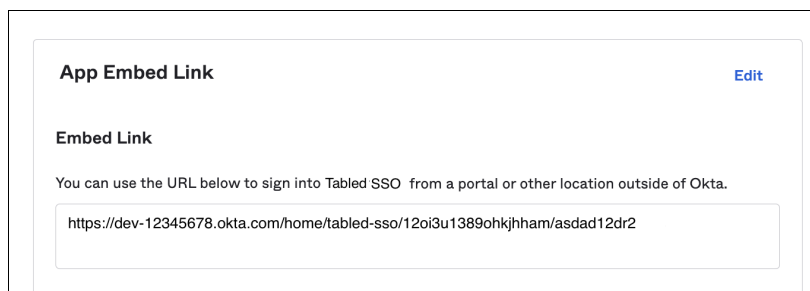
Step Two – Add the Tabled App to Okta

1. Login to your organisation's Okta tenant.

2. Navigate to **Admin > Applications > Applications > Browse App Catalog**, search for Tabled, and then click **Add integration**.

3. Enter an **Application Label** in General Settings. This is the name under which the Tabled app will appear in your Okta dashboard.

4. Click **Next**.

5. Then under **Sign On** tab of the Tabled application, select the option for **OpenID Connect** and click **Done**.

6. The screen will prompt you to the app settings.

7. Then, again, under the **Sign On** tab of the Tabled application, copy the **Client ID** and **Client Secret**. Keep this values somewhere else.

   ▪ Note: These values allow Tabled to communicate with Okta. The **Client ID** is a public identifier for the client that is required for all OAuth/OIDC flows. The **Client Secret** is a private identifier which you should not share or broadly distribute.

8. Under the **General** tab, find the **Okta Domain** (or **Issuer URL**), which is the URL at which you are accessing your Okta tenant (http://example.okta.com). This URL appears in the **Embed Link** section. Be sure to remove everything appearing after **okta.com**. It should be looking something like **https://dev-12345678.okta.com**. Copy this URL and keep this value somewhere else, along the Client ID and Client Secret.

App Embed Link   Edit

Embed Link

You can use the URL below to sign into Tabled SSO from a portal or other location outside of Okta.

https://dev-12345678.okta.com/home/tabled-sso/12oi3u1389ohkjhham/asdad12dr2

9.   Before leaving Okta, ensure you have given yourself and any other target users access to the Tabled application. You can do this by going to **Applications > Tabled > Assign** and then assigning to either the target people or group.

Step Three - Setup a workspace in Tabled

1.   In the workspace page you opened in Tabled.io, go to **Account > Workspace Settings > Integrations.**
2.   Enter your **Client ID**, **Client Secret** and the **Okta Domain** in the correct text boxes. Ensure that these values correspond to the ones obtained in the Step Two.
3.   Click **Save Okta Configuration**.

If the values provided in step 3.2, above, are correct, when the users try to login to Tabled using Okta, they will be prompted to enter their credentials in Okta and will be able to access Tabled without problems. If you did not give users in your Okta tenant access to the Tabled application, you may see an error prompting you to do so at this point.

If you experience any issues or have any questions, please reach out to paul@tabled.io to engage our support staff.

Assign People or Groups

As covered above in 2.9, to give people or groups access to the Tabled application, click the **Assignments** tab under the configured Tabled app, then click **Assign**. Leveraging **Groups** is recommended to assign access. If assigning access to **People**, ensure the **User Name** is a valid email.

SP-initiated SSO

After Tabled has been enabled to allow you to use Okta, logging in is easy. Follow the next steps:

1.   Open tabled.io

2. Click on the Okta icon from the section *"or Sign in with"* as shown in the image below
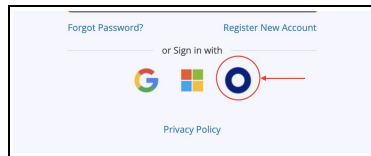
3. Input your email address
4. Select the workspace you want to log in to from the list
5. If you are not already logged in to Okta, you will be prompted to log in. Use your Okta credentials for this. Otherwise, you'll be redirected directly to the workspace selected.

Notes

Permissions

Tabled's integration with Okta leverages Okta only for authentication. To assign permissions for Tabled, users must do so directly within Tabled.