

Okta Users Provisioning For The Vable Platform

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Features

The following provisioning features are supported:

Push New Users

New users created through Okta will also be created in the third party application.

Push Profile Updates

Updates made to the user's profile through Okta will be pushed to the third party application.

Push User Deactivation

Deactivating the user or disabling the user's access to the application through Okta will deactivate the user in the third party application.

Note: For this application, deactivating a user means soft deletion of the user. User's subscription connections will remain in the event that the user is reactivated in Vable in the future.

Push Groups

Groups and their members can be pushed to remote systems. For more information about using group push operations, see [About Group Push](#).

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Reactivate Users

User accounts can be reactivated in the application.

Silent Provisioning

Allows you to silently provision users to Vable, preventing Vable from sending welcome emails to new users provisioned via Okta.

Import Users

Users may also be imported from Vable. Import may be either scheduled or triggered manually. For the detailed instructions please visit [Import Users](#).

Import Groups

Groups may also be pulled from Vable application via the import process. Please see [Import Groups](#) page for more information.

Requirements

To be able to set up this integration, you will need to meet the following prerequisites:

Provisioning parameters

To fully configure the provisioning between Okta and Vable, one needs to obtain Organization ID and Integration credentials from the Vable [support team](#).

Provisioning users with login access

By default, the integration with the Vable platform will create the users via silent provisioning.

Such users are unable to log in to the Vable Administrator application and perform any actions. To provision administrators, the user role needs to be modified to be an Administrator within the Vable Administrator platform.

Okta Admin user

These instructions are intended to be followed by an Okta user with leveraged permissions to the organization account.

Step-by-step Configuration Instructions

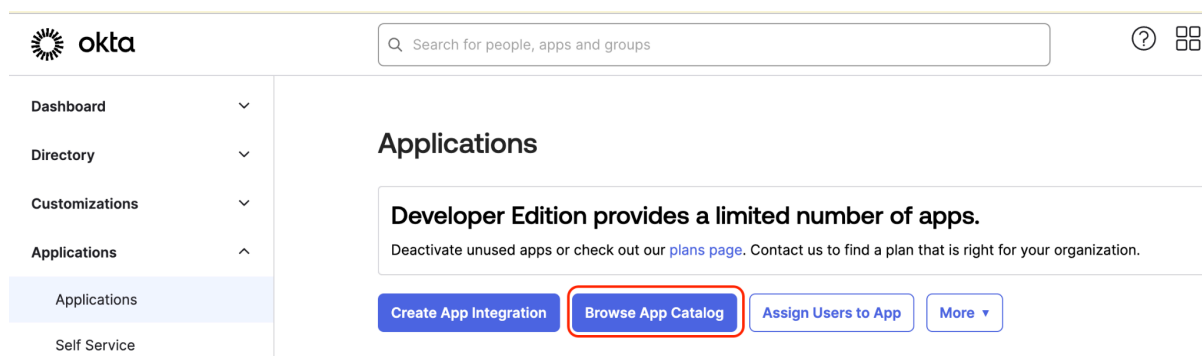
Requesting Vable Okta integration

As already mentioned, due to the nature of the integration mechanism, the Vable application needs to be configured with provisioning parameters (Organization ID, Username, Password).

Please contact our [Support team](#) and express the need for integrating with Okta.

Adding Vable private application to organization account

Once the dedicated-for-your-integration Vable application is reviewed by the Okta team, you will be able to select it.



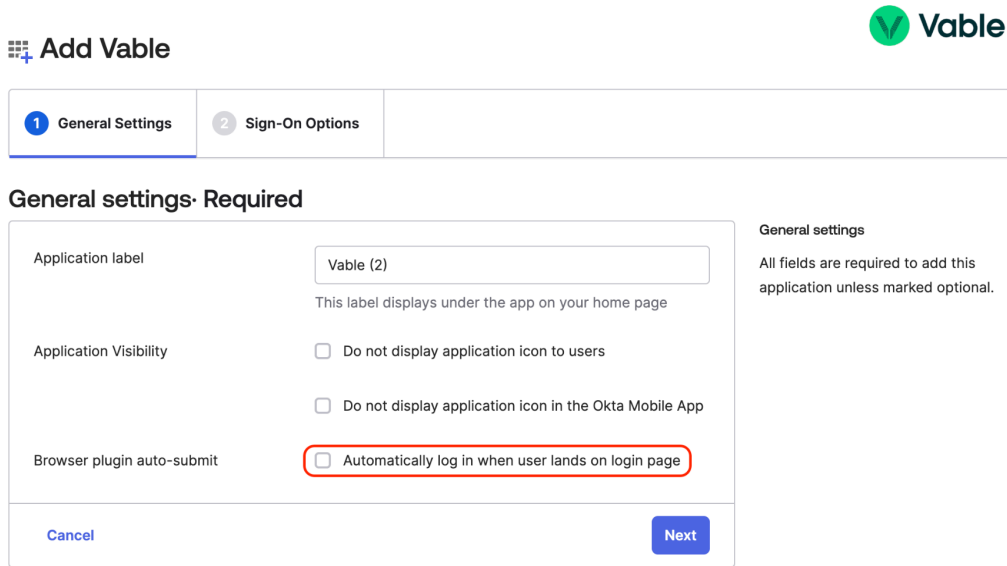
The screenshot shows the Okta user interface. On the left is a navigation menu with items: Dashboard, Directory, Customizations, Applications (expanded), and Self Service. The main content area is titled "Applications" and contains a message: "Developer Edition provides a limited number of apps. Deactivate unused apps or check out our [plans page](#). Contact us to find a plan that is right for your organization." Below this message are four buttons: "Create App Integration", "Browse App Catalog" (highlighted with a red box), "Assign Users to App", and "More".

On the next screen, search for "Vable" and click the "Add" button.

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Follow the wizard and replicate the checkbox selection as shown in the pictures below:



Add Vable

1 General Settings 2 Sign-On Options

General settings - Required

Application label: Vable (2)
This label displays under the app on your home page

Application Visibility

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

Browser plugin auto-submit

- Automatically log in when user lands on login page

Cancel Next

General settings
All fields are required to add this application unless marked optional.

Automatically log in when user lands on login page - *should be unchecked.*

1 General Settings 2 Sign-On Options

Sign-On Options · Required

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

Secure Web Authentication

- User sets username and password
- Administrator sets username and password
- Administrator sets username, user sets password
- Administrator sets username, password is the same as user's Okta password
- Users share a single username and password set by administrator

Credentials Details

Application username format:

Update application username on:

Password reveal: Allow users to securely see their password (Recommended)

About

Secure Web Authentication (SWA) allows users to edit the credentials used for signing on to this application.

The **Okta browser plug-in** is required for SWA sign on to this application.

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.

Please select: Secure Web Authentication > Administrator sets username and password*
**If SAML/SSO is also being included as part of the integration, SAML 2.0 may be selected instead.*

The integration with Vable is not going to fetch user passwords. The only information that is exchanged is:

- Username
- First Name

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- *Last Name*
- *Email Address*
- *Department (Optional)*
- *Country (Optional)*
- *City (Optional)*
- *User Type (Optional): may be used to further define a user's role within an organization rather than the access type for the platform*
- *Title (Optional)*
- *Practice Area (Optional): custom field, the area of law in which an attorney primarily focuses their career; this is the area of expertise or specialty for an attorney*
- *Groups (Optional)*

Please note: User email address is also used as username in Vable platform, since there're no separate mappings for Okta username & Okta user's primary email. Be careful with updating the Okta username as it will result in the user's email address being updated on the Vable side.

The next screen brings you to an option to assign the application to users, but we recommend doing this later and proceed without selecting anyone.

When all is successfully set up, please finish by clicking the Done button.

Configuring the provisioning

At this point, you should have been provided with the provisioning parameters to complete the Vable application setup.

Please navigate to the Provisioning tab and click the 'Configure API Integration' button, as shown below.

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Vable (Integration guide)

Active [lock] [wifi] [user] [user] [user] View Logs Monitor Imports [Go to integrations](#)

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

Settings
Integration

Vable: Configuration Guide
Provisioning Verification: Okta Verified
Contact partner support: support@vable.com

Provisioning is not enabled
Enable provisioning to automate Vable user account creation, deactivation, and updates.

[Configure API Integration](#)

Check the box called Enable API Integration.

Vable (Integration guide)

Active [lock] [wifi] [user] [user] [user] View Logs Monitor Imports [Go to integrations](#)

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

Settings
Integration

Vable: Configuration Guide
Provisioning Verification: Okta Verified
Contact partner support: support@vable.com

Enable API integration

[Cancel](#)

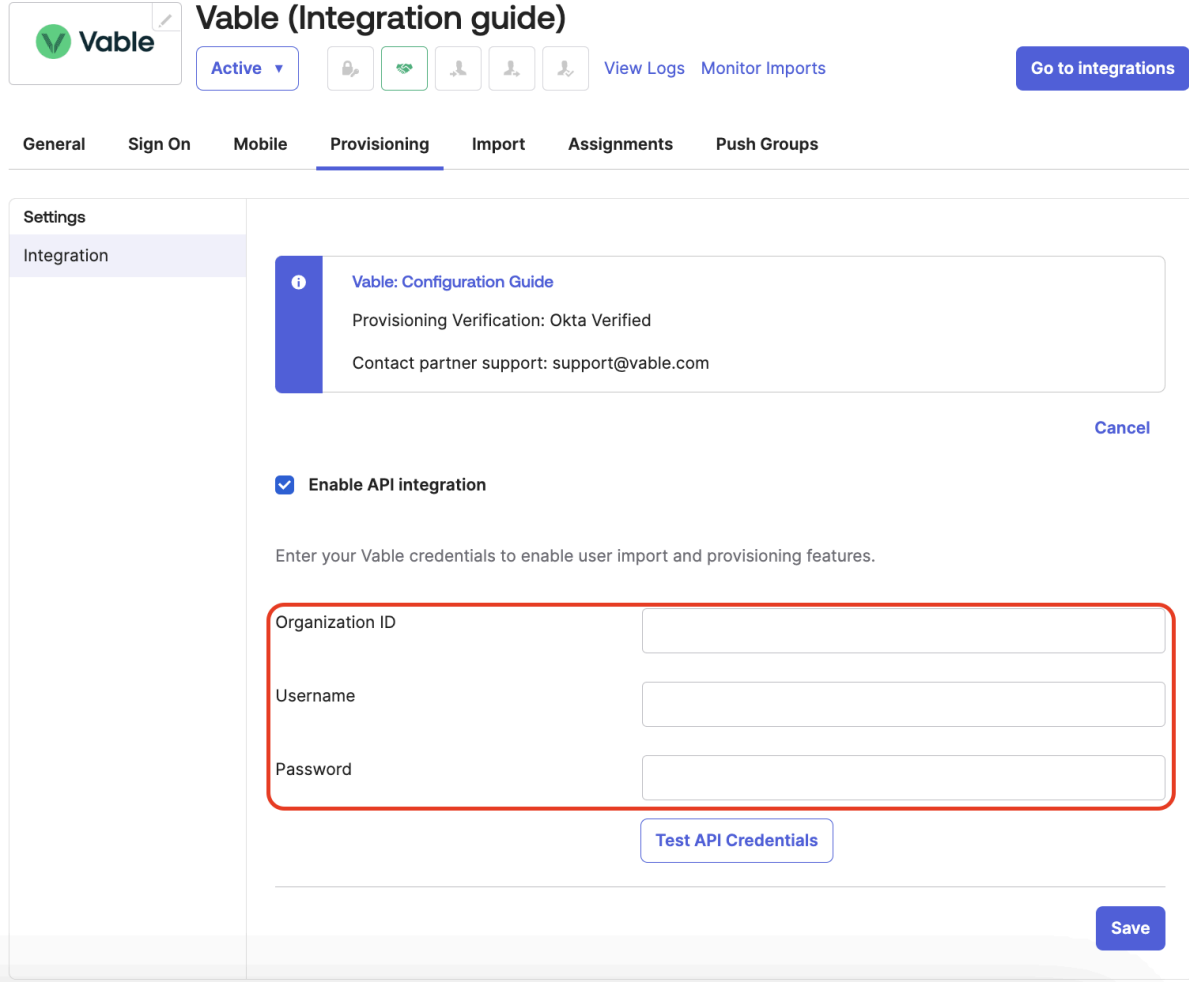
[Save](#)

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Additional fields will then appear.

Enter the provided Provisioning parameters into the API Credentials section and click the Test API Credentials button for the verification.



Vable (Integration guide)

Active ▾ [Icons] View Logs Monitor Imports [Go to integrations](#)

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

Settings
Integration

Vable: Configuration Guide
Provisioning Verification: Okta Verified
Contact partner support: support@vable.com [Cancel](#)

Enable API integration

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

Organization ID

Username

Password

[Test API Credentials](#)

[Save](#)

Please make sure the following options are Enabled:



- Create Users
- Update User Attributes
- Deactivate Users

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

Settings
To App
To Okta
Integration

 → 

Provisioning to App Cancel

Create Users **Enable**

Creates or links a user in Vable 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 Vable when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in Vable.

Deactivate Users **Enable**

Deactivates a user's Vable 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.

Save

Once configuration is set and verification is successful, scroll down and click the Save button.

Assigning Users

Depending on the organization of your Okta integrated Active Directory, you may want to provision all of your users to Vable (Everyone) or selected groups.

Let's go through the latter case and select a few groups to have Vable accounts created.

On the "Vable" application settings page, navigate to Assignments > Assign to Groups.

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Type
01101110
01101111
01110100
01101000
01101101
01101110
01100111
No users found

Within the popup dialog, please click the "Assign" button corresponding to all the desired groups and click "Done".

Assign Vable (Integration guide) to Groups

Group	Action
Administrators	Assigned
Everyone All users in your organization	Assign
HR	Assigned
Knowledge Resources	Assigned

Once completed, all the users from selected groups will be visible under your Vable account.

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Granting the provisioned user login rights

By default, the above added users will be created in the Vable platform as End Users, which means they are not provided with access to the Vable Administrator application. To grant such privileges to a user, the user role needs to be modified to be an Administrator within the Vable Administrator platform.

How to update your current Vable - Okta integration

If you're currently using the Vable - Okta integration, please use the following steps in order to enable/access the latest updates:

- Go to the "Provisioning" tab in Okta and click on "Integration" in the left navigation menu.
- Click "Edit".
- Uncheck the "Enable API integration", click "Save".
- Again, on the "Integration" page in "Provisioning" tab, click "Edit".
- Check "Enable API integration", enter the API token, click Save.
- Enable provisioning features.
- After this, you'll see new attribute updates and integration capabilities reflected in the integration.

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Troubleshooting and Tips

- When you deactivate or delete the user in Okta, the same will happen in Vable.
- Similarly, when the user is reactivated or recreated, these changes are going to be propagated to Vable.
- If you have opted to provision selected groups, rather than all of your users to Vable, you'll want to ensure that the selected groups are actively updating lists.
- It's important to note that Okta runs a live update to add, update and delete users as those changes occur in Okta. Okta does not perform a full comparison of existing users, so any users not initially included in Okta will not be updated or removed via the Okta integration.

Our dedicated team of engineers awaits your questions and feedback at support@vable.com.

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