

# 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 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.

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# 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 type 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

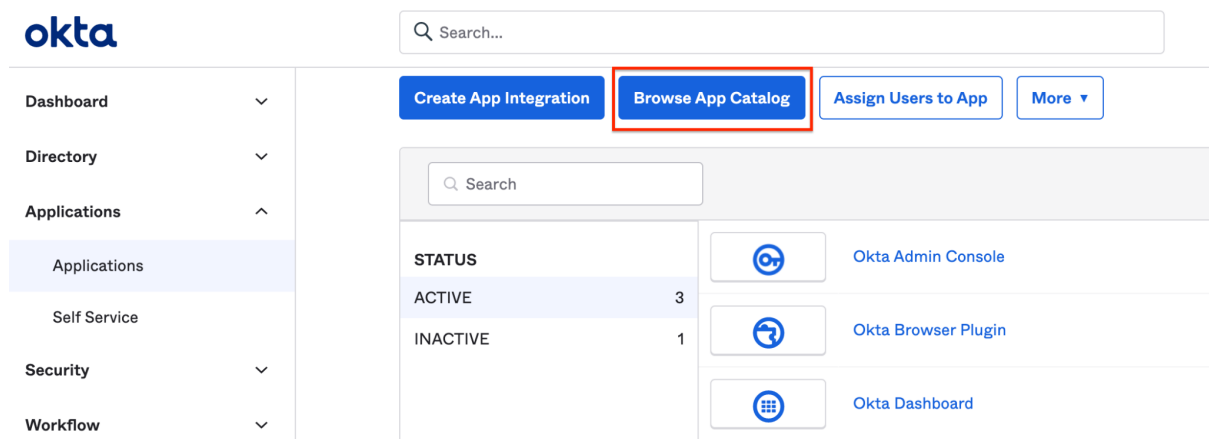
## Requesting Vable Okta integration

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 Admin Console interface. On the left is a navigation menu with items: Dashboard, Directory, Applications, Self Service, Security, and Workflow. The 'Applications' section is expanded. At the top right is a search bar. Below the search bar are four buttons: 'Create App Integration', 'Browse App Catalog' (highlighted with a red box), 'Assign Users to App', and 'More'. Below these buttons is a table with a search bar and a list of applications. The table has columns for 'STATUS', a count, and application details. The 'ACTIVE' status has a count of 3, and 'INACTIVE' has a count of 1. The applications listed are 'Okta Admin Console', 'Okta Browser Plugin', and 'Okta Dashboard'.

STATUS		
ACTIVE	3	 Okta Admin Console
INACTIVE	1	 Okta Browser Plugin
		 Okta Dashboard

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:

1 General Settings    2 Sign-On Options

### General Settings · Required

Application label	<input type="text" value="Vable"/>
	This label displays under the app on your home page
Application Visibility	<input type="checkbox"/> Do not display application icon to users
	<input type="checkbox"/> Do not display application icon in the Okta Mobile App
Browser plugin auto-submit	<input type="checkbox"/> Automatically log in when user lands on login page

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

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

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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 3<sup>rd</sup> 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: Okta username

Update application username on: Create and update

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

[Previous](#)    [Cancel](#)    [Done](#)

**Please select:** Secure Web Authentication > Administrator sets username and password

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

- Username
- First Name
- 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.

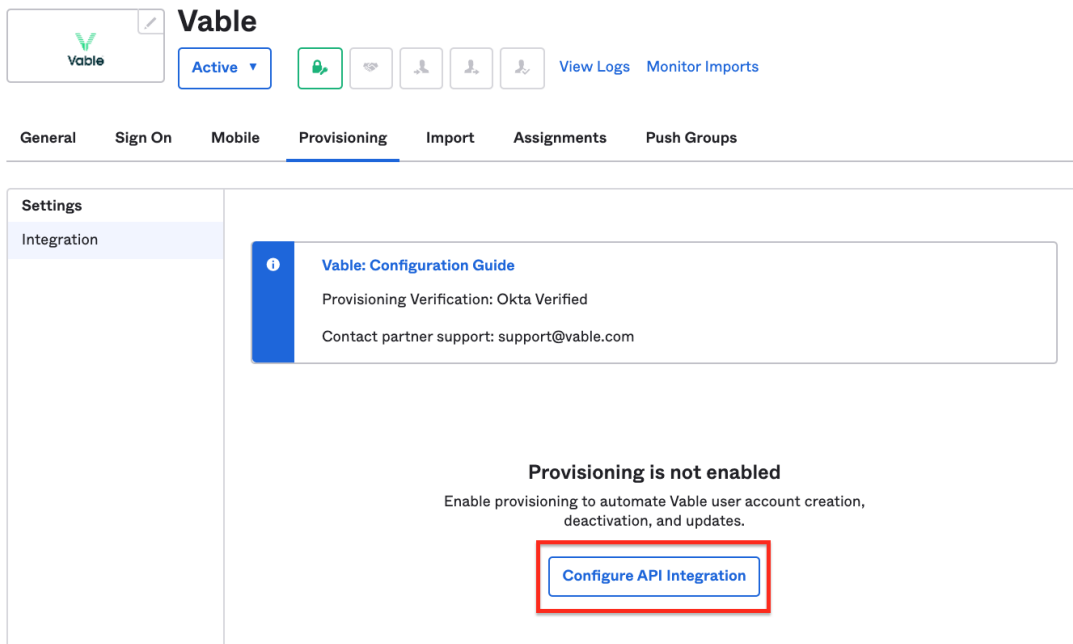
## Configuring the provisioning

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.

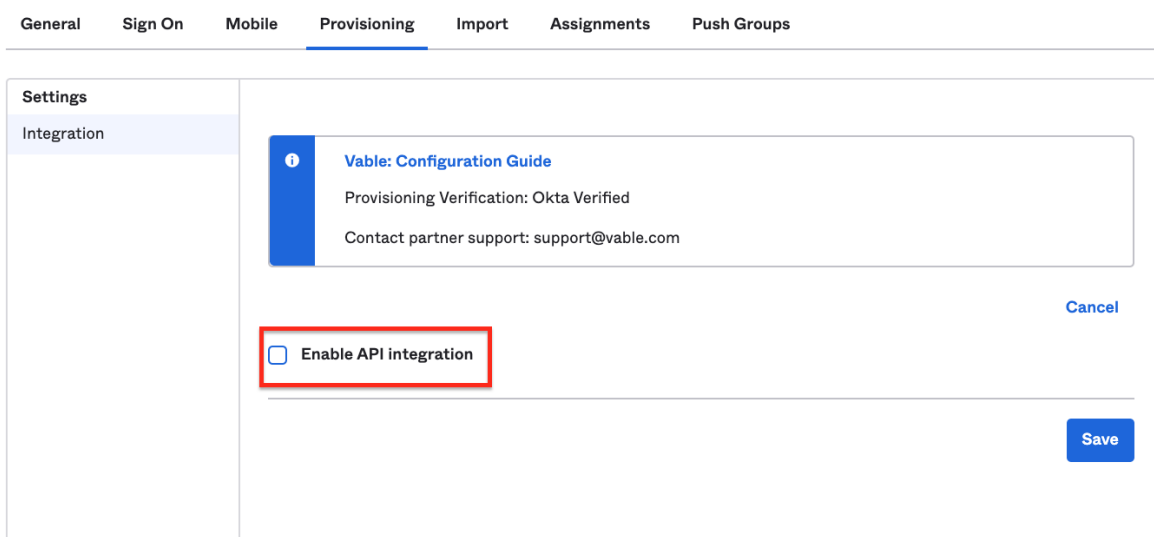
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← Back to Applications



The screenshot shows the Vable application settings page. At the top, there is a navigation bar with tabs: General, Sign On, Mobile, Provisioning (selected), Import, Assignments, and Push Groups. Below the navigation bar, there is a settings card for the Vable application. The card has a status of 'Active' and several icons. A 'View Logs' and 'Monitor Imports' link is visible. The 'Provisioning' tab is active, and the 'Integration' sub-tab is selected. A message box titled 'Vable: Configuration Guide' contains the text: 'Provisioning Verification: Okta Verified' and 'Contact partner support: support@vable.com'. Below this message, a bold heading reads 'Provisioning is not enabled', followed by the text: 'Enable provisioning to automate Vable user account creation, deactivation, and updates.' A button labeled 'Configure API Integration' is highlighted with a red box.

Check the box called Enable API Integration.



This screenshot shows the same Vable application settings page as above, but with the 'Enable API integration' checkbox checked and highlighted with a red box. The 'Configure API Integration' button is no longer visible. The 'Save' button is now visible at the bottom right of the settings card, and a 'Cancel' link is visible at the top right of the message box area.

Additional fields will then appear.

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

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 User
- Update User Attributes
- Deactivate Users

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



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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**.

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**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.

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**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.

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**Save**

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

## Provisioning Users and Groups

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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The screenshot shows the 'Assignments' page with a search bar and a dropdown menu. The dropdown menu is open, showing 'Assign to People' and 'Assign to Groups' (highlighted with a red box). Below the menu, there is a table with a 'Type' column containing binary strings and a 'No users found' message.

Type
01101110
01101111
01110100
01101100
01101101
01101110
01100111

No users found

On the popup, please click the "Assign" button corresponding to all the desired groups & click "Done".

The screenshot shows the 'Assign Vable to Groups' popup with a search bar and a list of groups. The 'Legal' group's 'Assigned' button is highlighted with a red box.

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

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

## Granting the provisioned user login rights

By default, the above added user are End Users only, which means they are not provided with access to the Vable administrator application. To grant such privileges to a user, the user type needs to be modified to be an Administrator within the Vable administrator platform.

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# 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.

Our dedicated team of engineers awaits your questions and feedback at [support@vable.com](mailto:support@vable.com).

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