Configuring the Heureka Platform Connector for Okta

This integration with Okta is currently under development and is not available to customers yet. Contact us to learn more.

This guide provides the steps required to configure the Okta connector for the Heureka Platform, and includes the following sections:

- Features
- Prerequisites
- Configuration Steps
- Troubleshooting Tips

Features

The following provisioning features are supported:

- **Push New Users** - New users created through OKTA will also be created in the Heureka Platform.
- **Push Profile Updates** - Updates made to the user's profile through OKTA will be pushed to the Heureka Platform.
- **Push User Deactivation** - Deactivating the user or disabling the user's access to the application through OKTA will deactivate the user in the Heureka Platform.
- **Reactivate Users** - User accounts can be reactivated in the application.

Prerequisites

To continue, you must have adminstrator access to the Heureka Platform, and the rights to modify your Okta application.
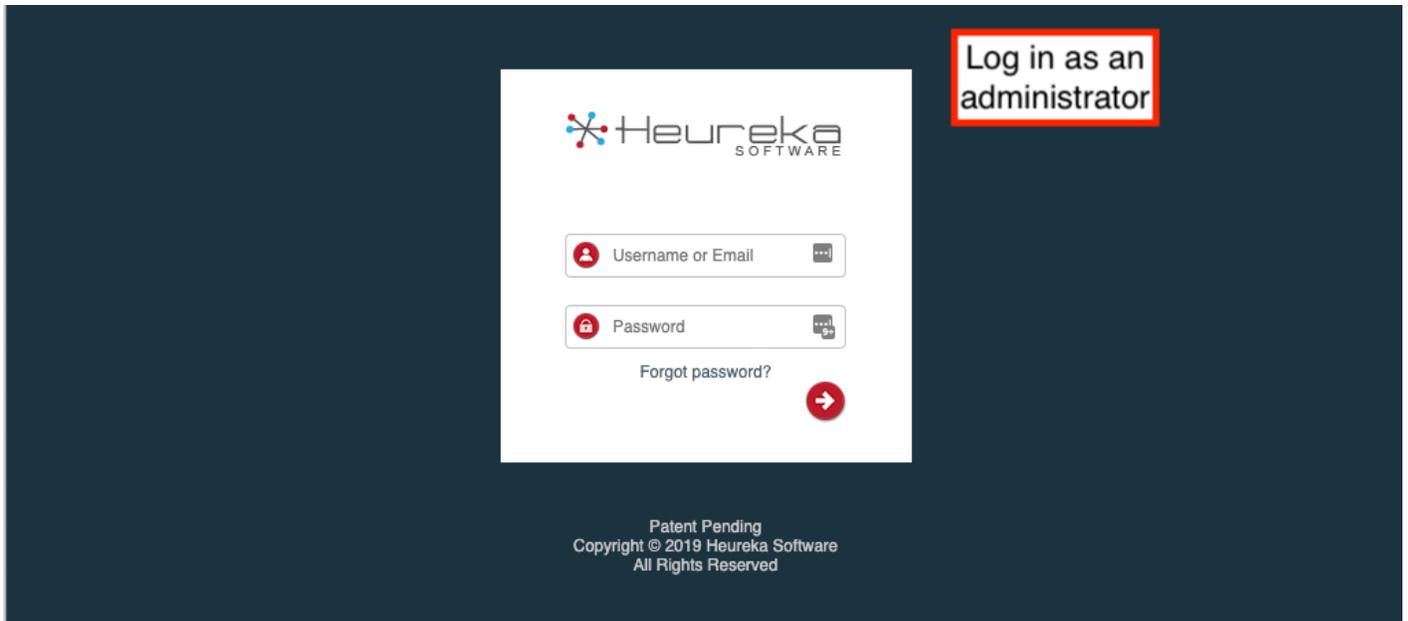
Configuration Steps

There are two steps to correctly configuring the Okta connector. One each for Heureka and Okta.

Heureka Platform Configuration

- Log in to Heureka with an administrator account.

- Select "Configuration" from the User drop down menu at the top right. If you do not see this option, you do not have an administrator account. Contact the administrator of this system or Heureka support.
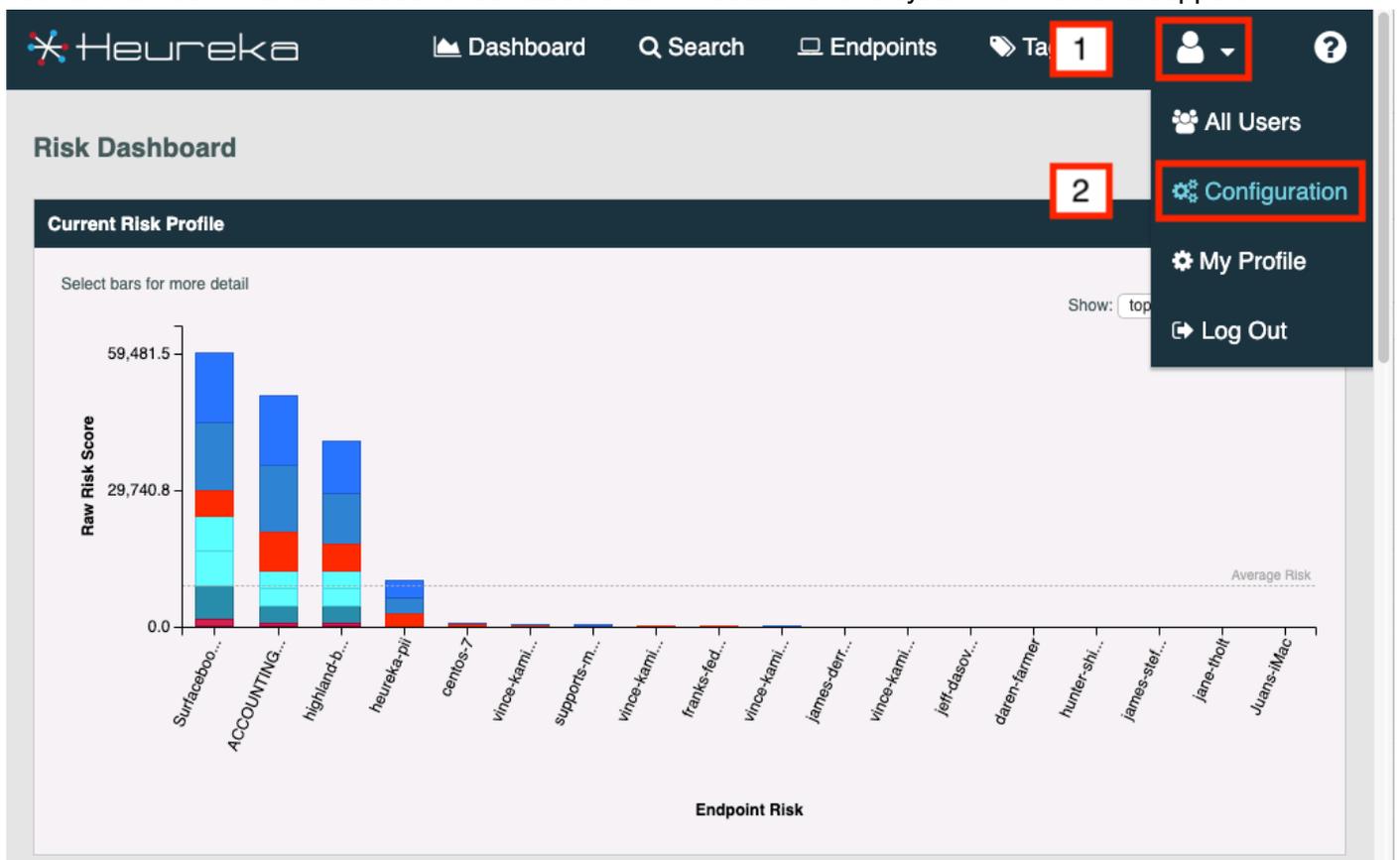
- Go to the section labeled "SCIM", if the checkbox "Enable SCIM" is not checked, check it.

- Copy the value labled "Bearer Token", or refer back to this section later. You will need this token to set up the Okta SCIM application.

- Copy the URL in the address bar. The format of this URL will be, *for example*: `https://mycompany.heurekasoftware.com` Make sure to include everything, including `https://` through to `.com` and nothing else.
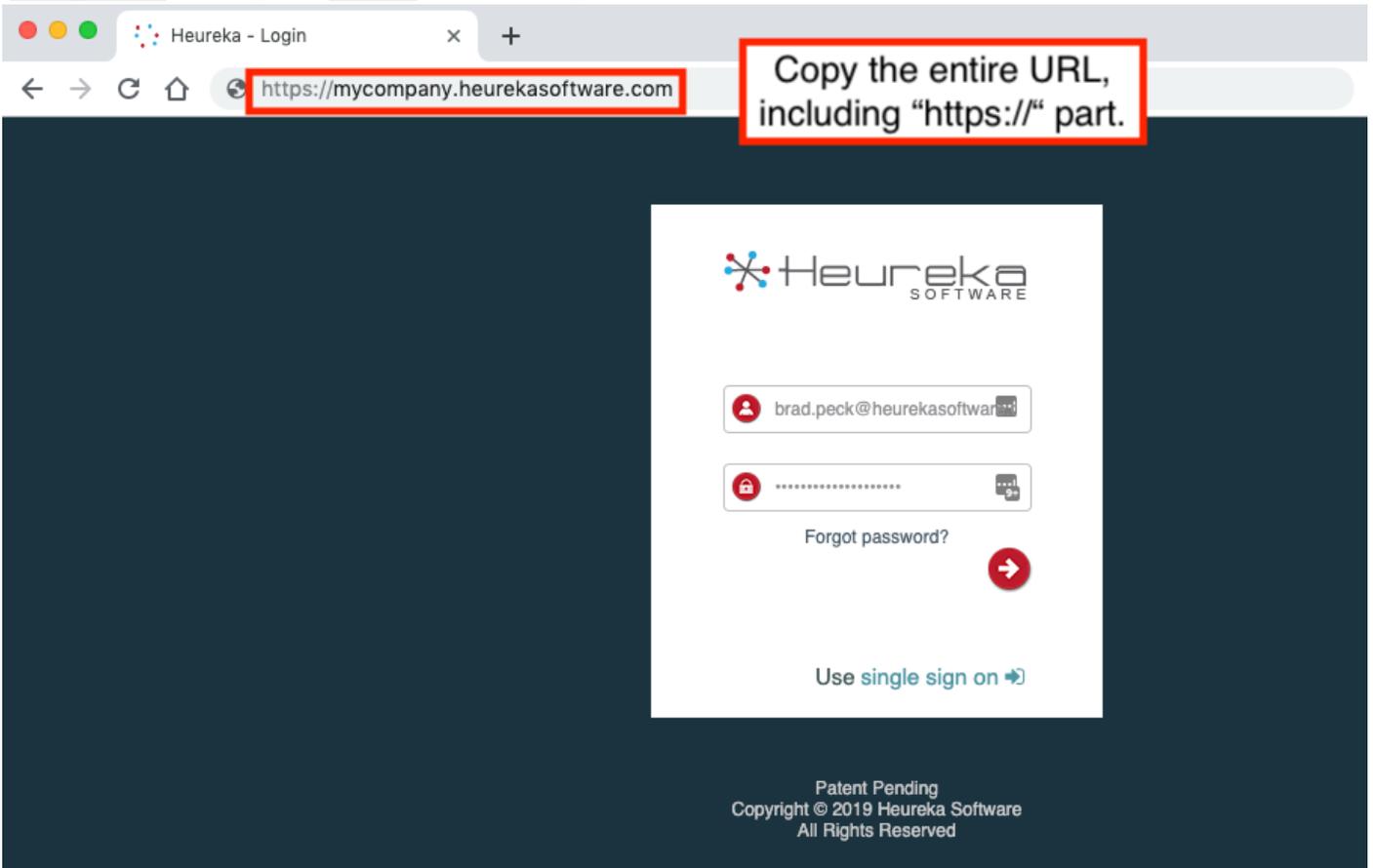
Okta Application Configuration

Okta configuration requires:

- Adding the Heureka Platform Connector
- Configuring Provisioning
- Configuring Sign-On

Heureka Platform Connector - Adding

- Log in to your Okta administrative console as an administrator.
- On the main menu, click "Applications".
- On the side menu, click "Add Application".
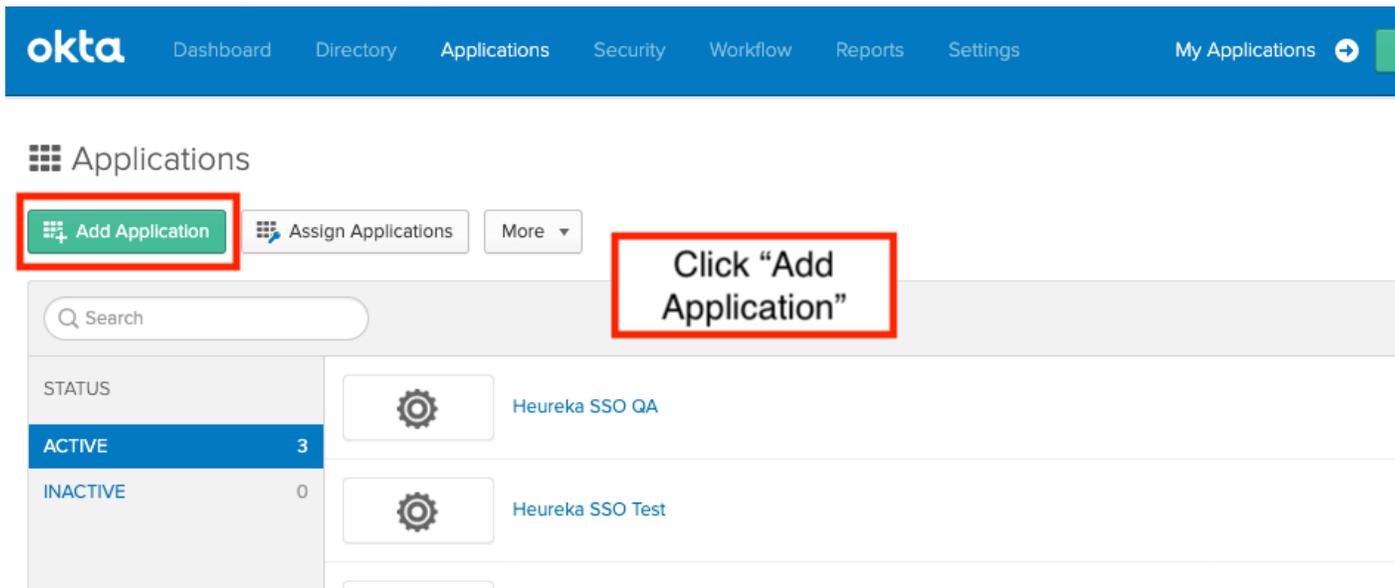
- In the search bar, type "Heureka".
- Look for the Heureka Platform Connector, click "Add" button.
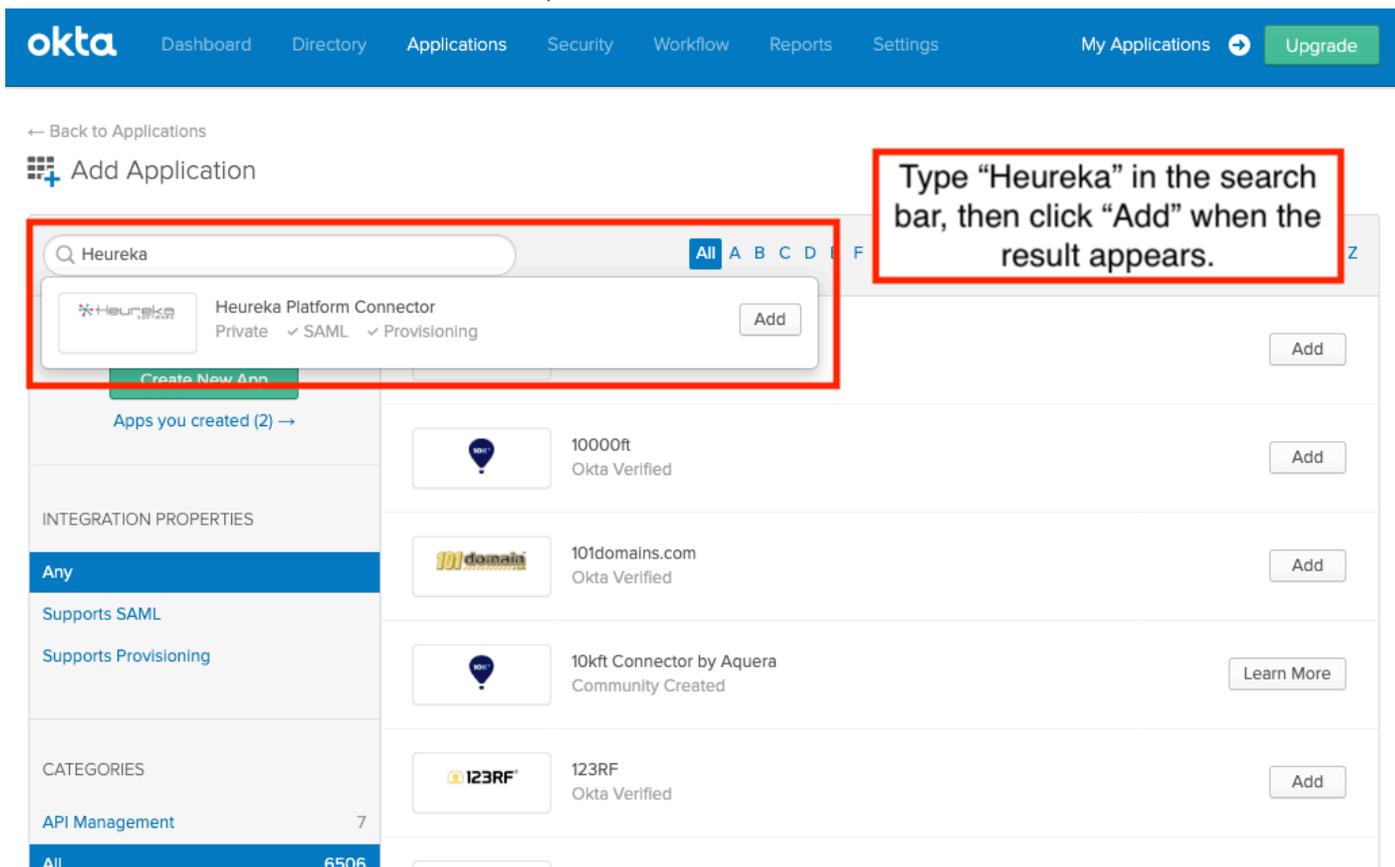
- Click "Done"

Heureka Platform Connector - Provisioning

- Use the URL and token from the steps above in `Heureka Platform Configuration` to configure the connector:

    - 1 - Click "Provisioning" subtab
    - 2 - Check the box labeled "Enable API Integration"
    - 3 - Fill the boxes for "Base URL" and "API Token"
    - 4 - Click the button labeled "Test API Credentials"
    - **Success** - When Okta has connected to Heureka you will see a message displayed
    - 5 - Click "Save" when done

- Get the metadata URL and provide to Heureka.
    - Click the "Sign On" sub tab
    - Right-click on the link with text of "Identity Provider metadata" and select "Copy Link Address" (Chrome) or "Copy Link Location" (Firefox); provide this URL to Heureka.
    - **Note:** This URL is needed to complete the setup of your single sign-on feature.

Heureka Platform Connector - Sign-On

After you have provided Heureka support with your Heureka Platform Connector metadata URL, we will set up your application's single sign-on feature and provide you with the single sign-on `Base URL`; use this URL to complete the single sign-on setup. This feature will not work until you complete the setup.

- Log in to your Okta administrative console as an administrator.
- On the main menu, click "Applications", click on your Heureka Platform Connector app to edit it.
  - 1 - Click on the "Sign On" sub tab
  - 2 - Click on the "Edit" button.

- Save the `Base URL`

    - 1 - Fill in the `Base URL` using the value provided to you by Heureka support. **Note:** This URL may be different than the base URL used in the Provisioning step depending on whether your Heureka Platform is hosted on premises or in the cloud.
    - 2 - Click "Save" button at the bottom.

- You are ready to use the single sign-on feature in Heureka Platform. You will see a link on your login screen. Again, this will not work properly if you have not completed these steps.
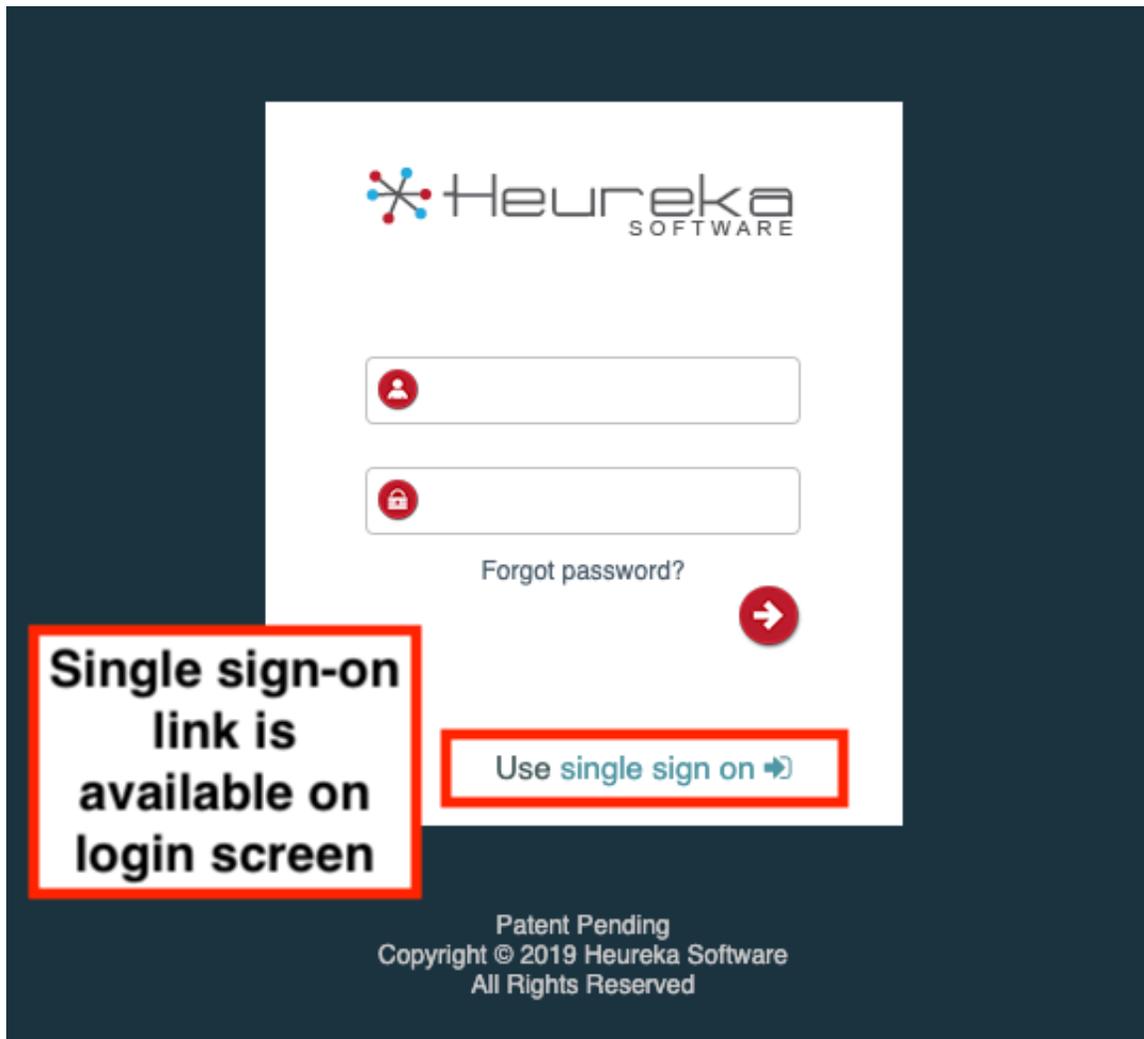
Troubleshooting Tips

- Check the settings in this guide *exactly*. Missing any information will likely lead to your connector not working.

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