

CAASS

OKTA CONFIG GUIDE

AUGUST 14, 2024

ACCESS411



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Prerequisites

To get started with SSO you will need to:

- Add the CAASS integration from the OIN catalog in Okta
- Contact Access411 to get a district code and exchange metadata
- Set up users in CAASS and assign roles and schools

If you need help with any of these feel free to contact support@access411.com or go to <https://www.access411.com/online-support/>

Supported Features

If your school district uses Okta, CAASS supports both SP-Initiated and IDP-Initiated Single Sign-On. Employees that have an account in Okta and an account in CAASS with the same email address will be able to log in with their Okta account.

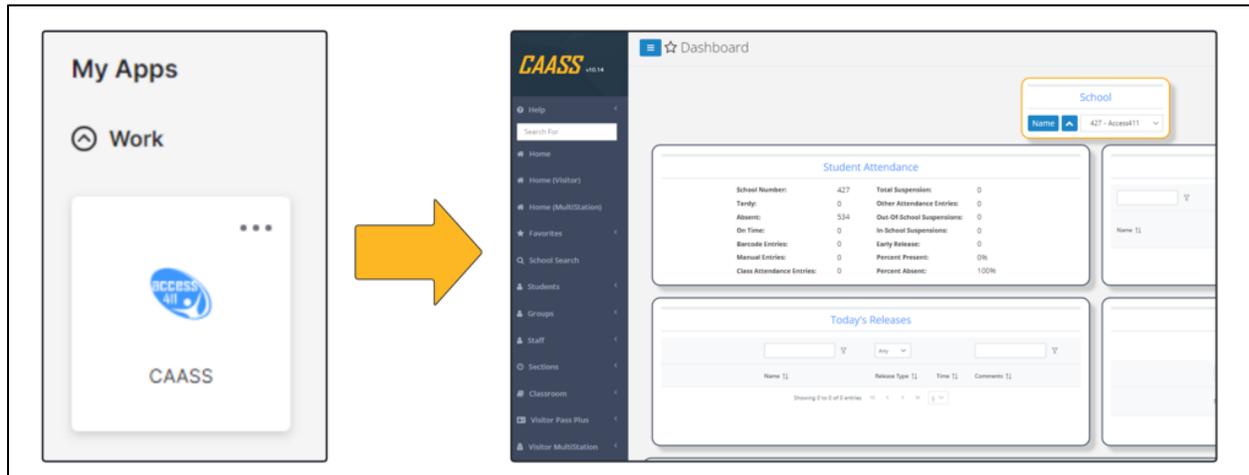
SP-Initiated Single Sign-On:

- 1) Go to your District's Login Page
- 2) Press **Login with Okta**
- 3) You'll be asked to log in to Okta with your Okta account's username and password
- 4) Next CAASS will check that you an active account with the district
- 5) If you have a CAASS account you will be logged in normally



IDP-Initiated Single Sign-On:

- 1) When you are logged into Okta, go to **My Apps**
- 2) Click on **CAASS**
- 3) CAASS will check that you have an active account
- 4) If you have a CAASS account you will be logged in normally



Alternatively, your district will also have a link that can be used to log in to CAASS. You can find it in the **App Embed Link** section under **General** when you are setting up the application.

VPN Notification Edit

VPN Required Notification Disabled

App Embed Link Edit

Embed Link

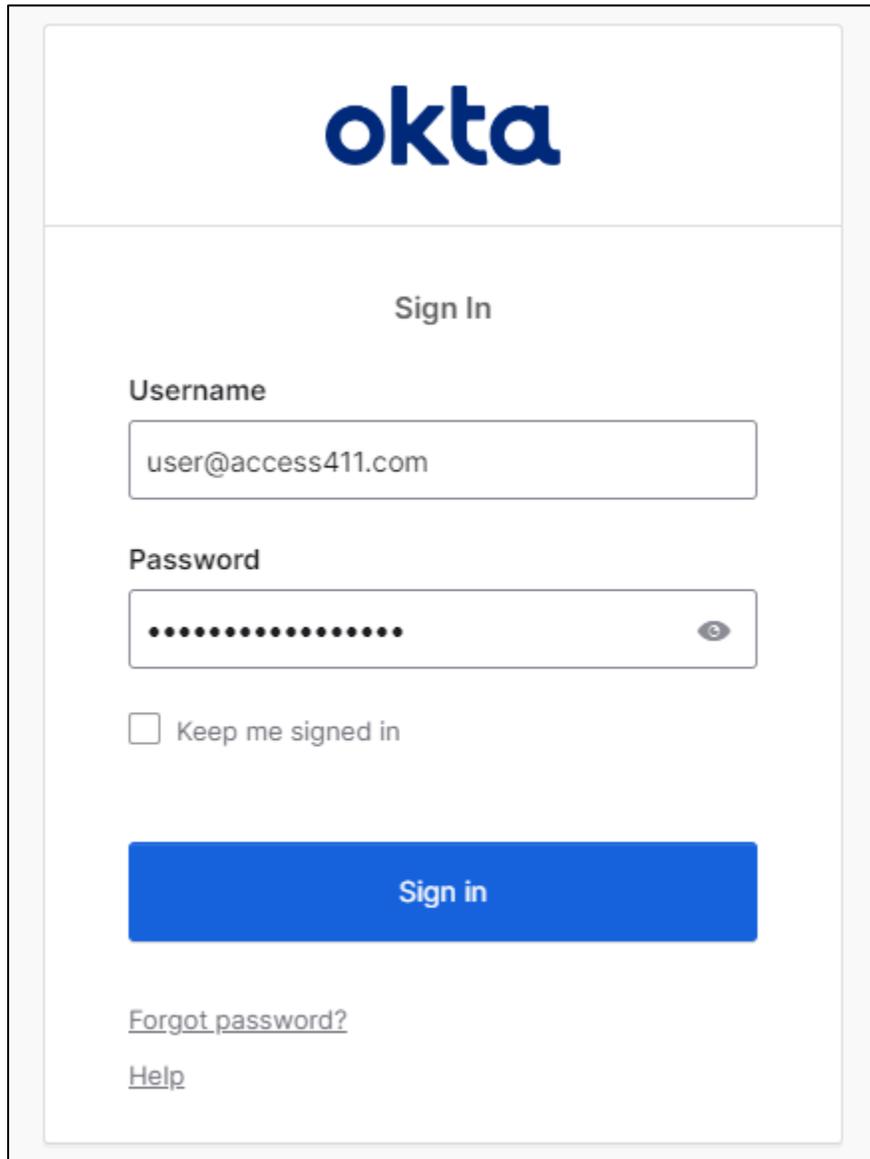
You can use the URL below to sign into CAASS from a portal or other location outside of Okta.

https://dev-17618442.okta.com/home/dev-17618442_caass_2/0oaiq38luzH3sNbH45d7/alniay8hnjZW8Djh25d7

Application Access Error Page

Configuration Steps

1) Log in to Okta



The image shows a screenshot of the Okta Sign In page. At the top center is the Okta logo. Below it is the text "Sign In". There are two input fields: "Username" with the value "user@access411.com" and "Password" with a masked password represented by dots and a toggle icon. Below the password field is a checkbox labeled "Keep me signed in". A large blue button labeled "Sign in" is positioned below the checkbox. At the bottom left, there are two links: "Forgot password?" and "Help".

okta

Sign In

Username

user@access411.com

Password

.....

Keep me signed in

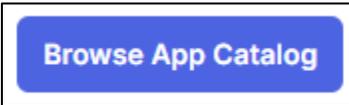
Sign in

[Forgot password?](#)

[Help](#)

2) Add CAASS Integration

Go to the App Catalog (This might look different in your dashboard)



Search for **CAASS** and add the application

Applications > Catalog > All Integrations

Browse App Integration Catalog

Create New App

Use Case	
All Integrations	7905
Apps for Good	13
Automation	198
Centralized Logging	49
Directory and HR Sync	80
Bot or Fraud Detection	9
Identity Proofing	49
Identity Governance and Administration (IGA)	69
Lifecycle Management	713
Multi-factor Authentication (MFA)	66
Risk Signal Sharing	11
Social Login	10

Search: CAASS

All Integrations Sort by: Default

FEATURED See all

 Single Sign-On

Salesforce.com

Sign into salesforce.com and automate onboarding and offboarding processes

Workflow Templates SWA

Workflows Connectors SAML

 Single Sign-On

ServiceNow UD

Sign into servicenow.com and automate onboarding and offboarding processes

SAML Workflow Templates SWA

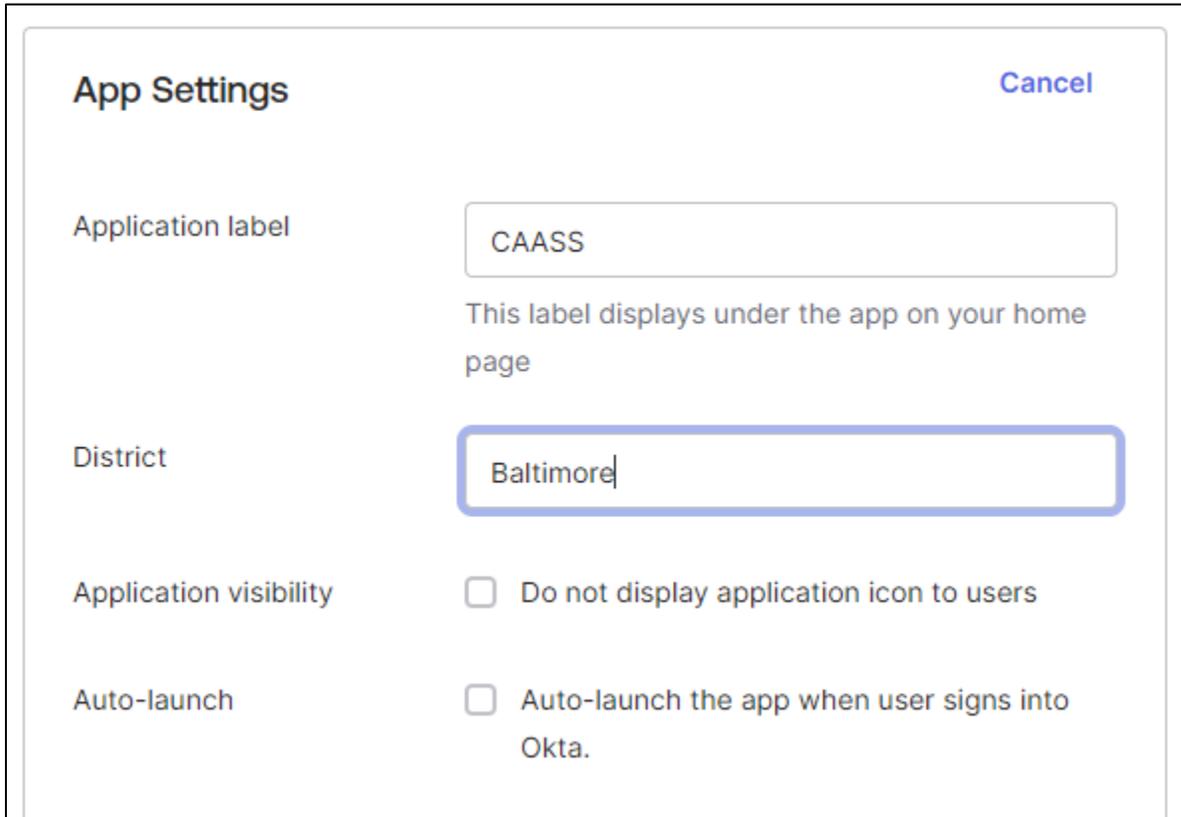
Workflows Connectors SCIM

 Office 365

 Single Sign-On

3) Fill in the District Name you received from Access411

Under App Settings it will ask for your District's name. Access411 will provide you with a code to use.



App Settings Cancel

Application label
This label displays under the app on your home page

District

Application visibility Do not display application icon to users

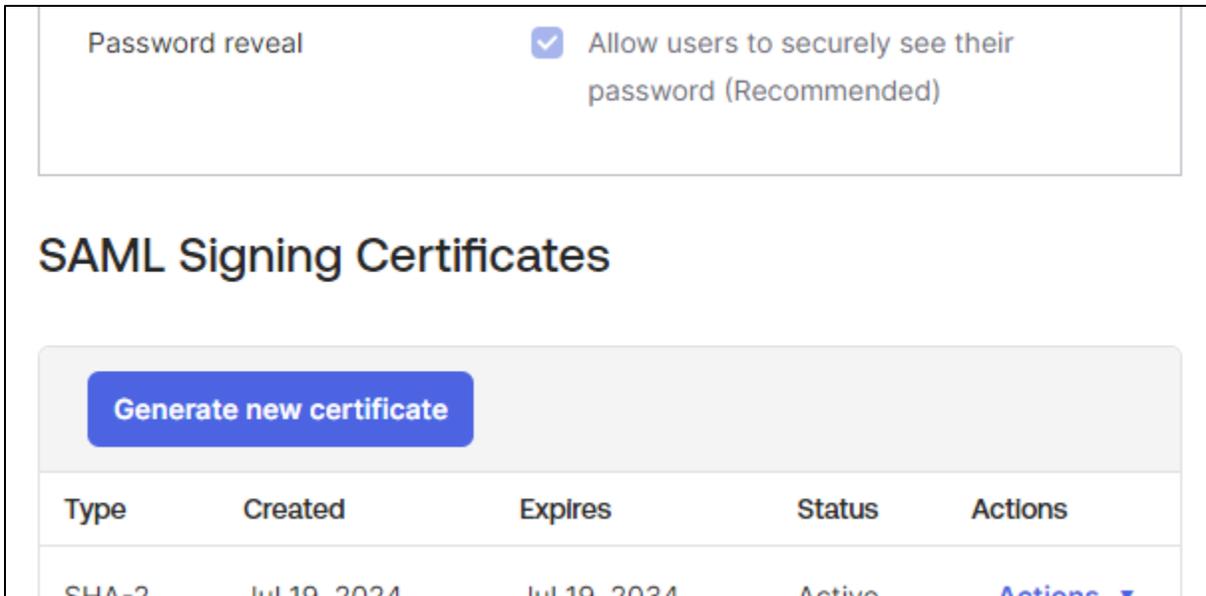
Auto-launch Auto-launch the app when user signs into Okta.

4) Send Metadata to Access411

Go to the **Sign On** Tab



Scroll to the bottom where it says **SAML Signing Certificates**



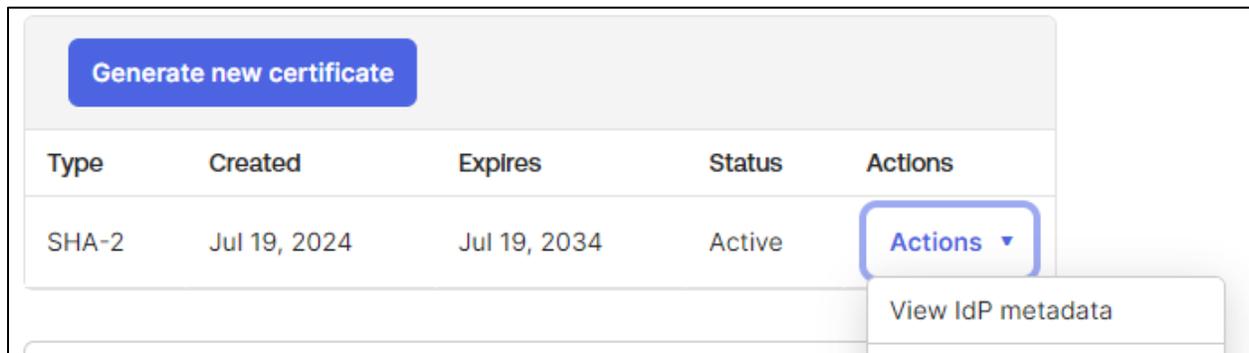
Password reveal Allow users to securely see their password (Recommended)

SAML Signing Certificates

[Generate new certificate](#)

Type	Created	Expires	Status	Actions
SHA-2	Jul 19, 2024	Jul 19, 2034	Active	Actions ▾

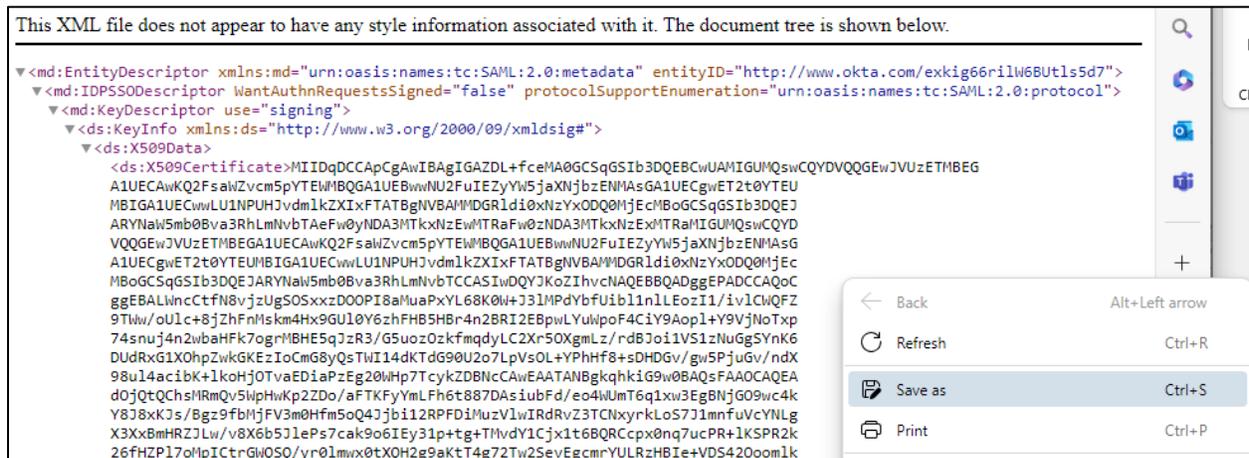
Find your current certificate and press **Actions** and then **View IdP metadata**.



[Generate new certificate](#)

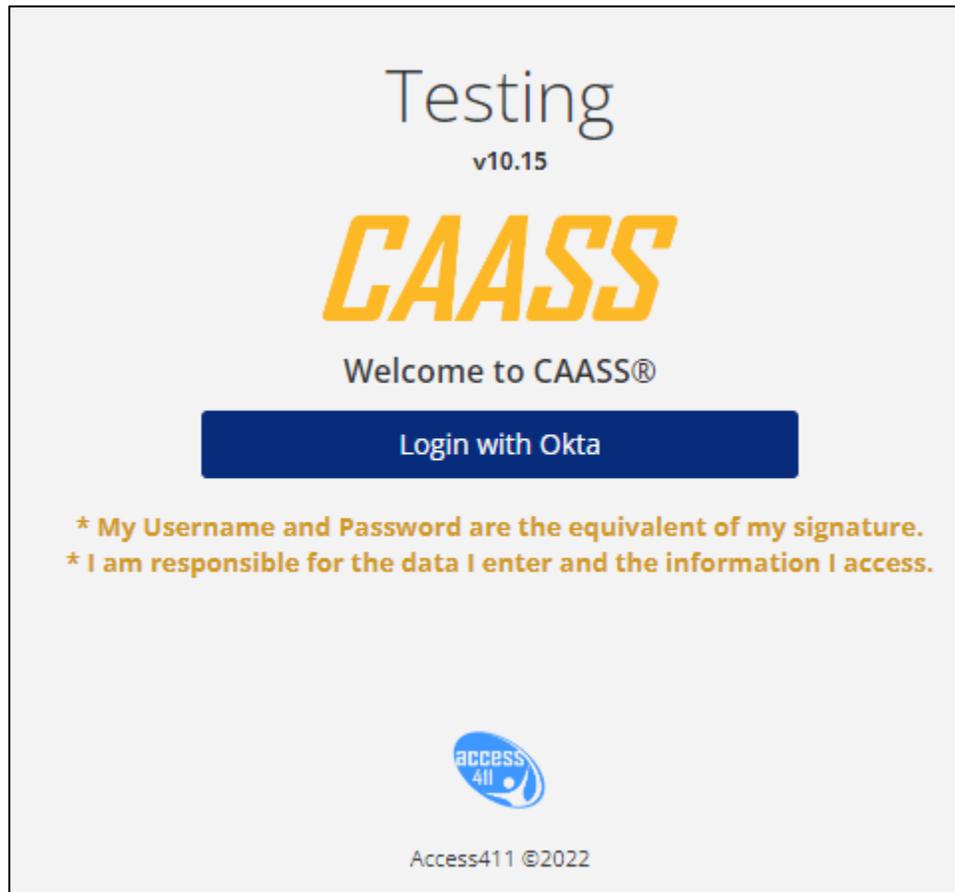
Type	Created	Expires	Status	Actions
SHA-2	Jul 19, 2024	Jul 19, 2034	Active	Actions ▾ View IdP metadata

Right Click and Press **Save As** and save the **.XML** file. Email the file to support@access411.com.



Access411 will need the certificate to connect your Okta account to CAASS. After the certificate is updated you will be able to log in to CAASS using your Okta accounts.

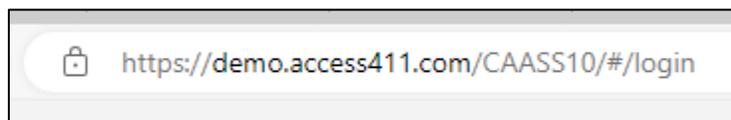
5) Press Login to Okta when logging in to CAASS



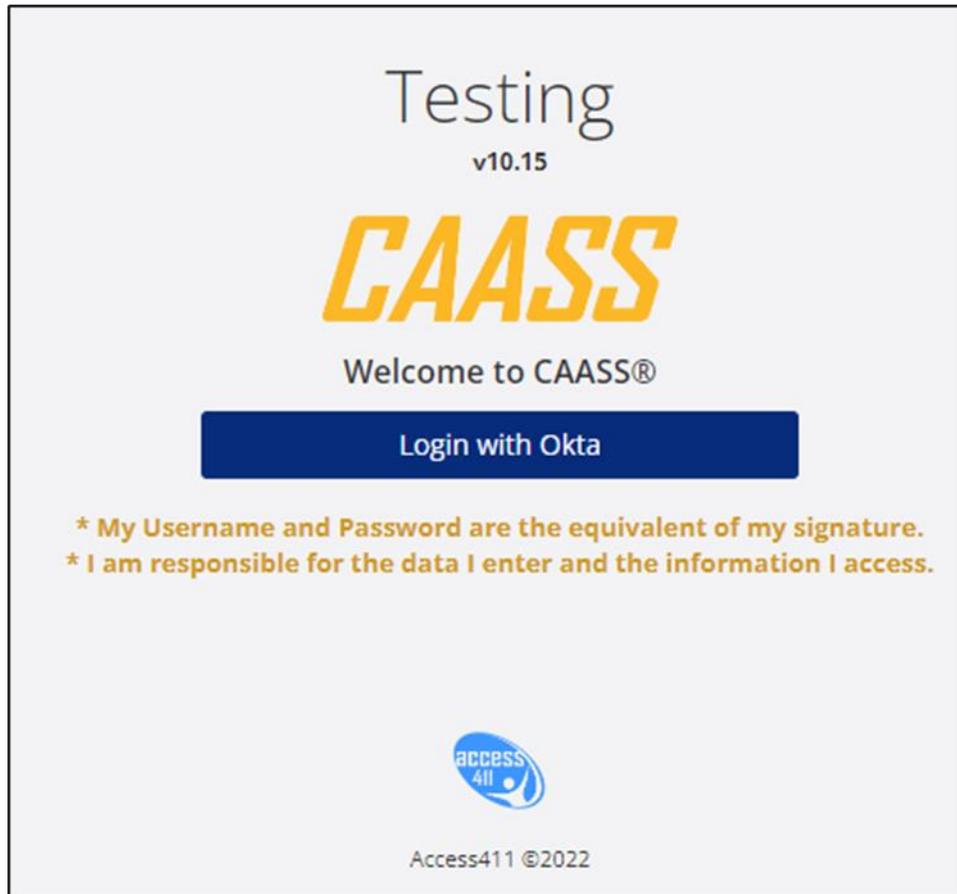
SP-Initiated SSO

1) Navigate to your school district's CAASS website

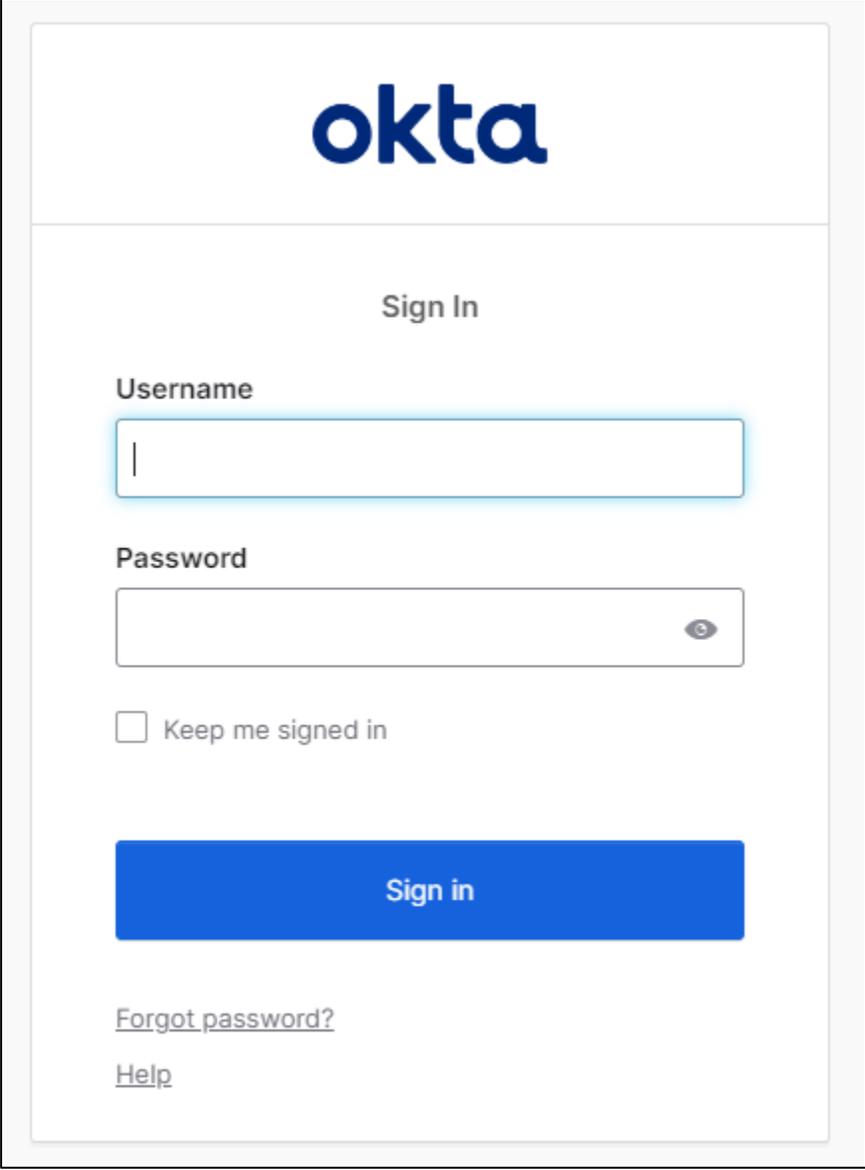
Ex. demo.access411.com



2) From the login screen press the Login with Okta button



3) Enter your Okta credentials



The image shows the Okta Sign In page. At the top center is the Okta logo in blue. Below the logo is the text "Sign In". There are two input fields: "Username" and "Password". The "Username" field is highlighted with a blue glow. Below the "Password" field is a checkbox labeled "Keep me signed in". At the bottom of the form is a blue "Sign in" button. Below the button are two links: "Forgot password?" and "Help".

okta

Sign In

Username

Password

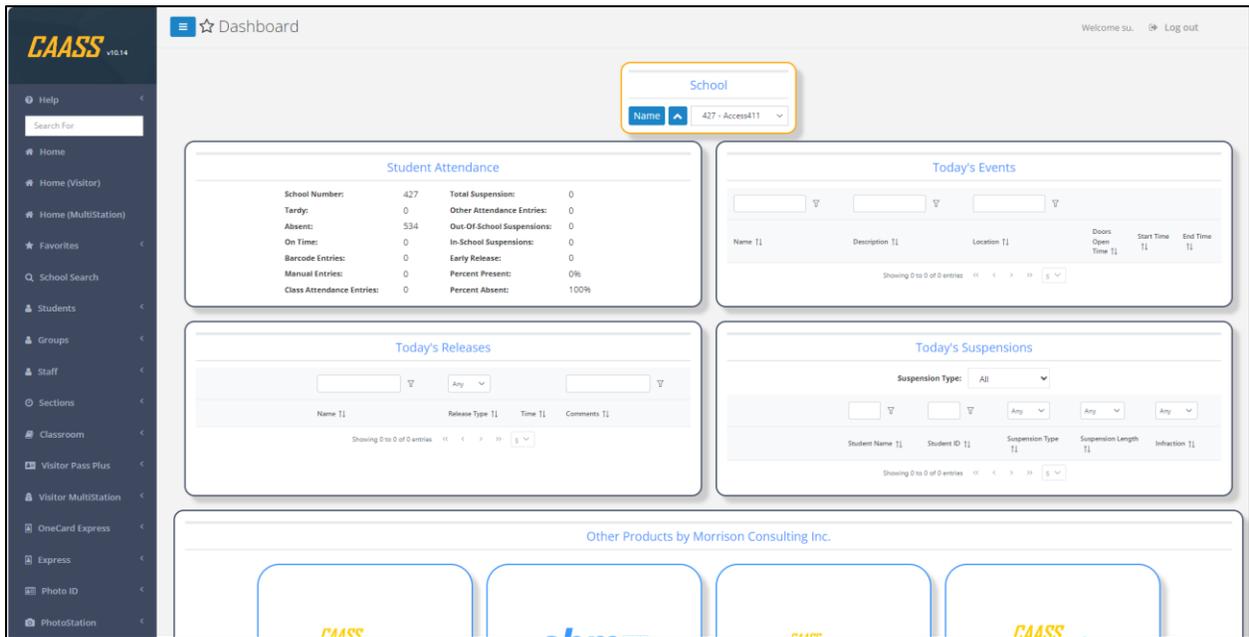
Keep me signed in

Sign in

[Forgot password?](#)

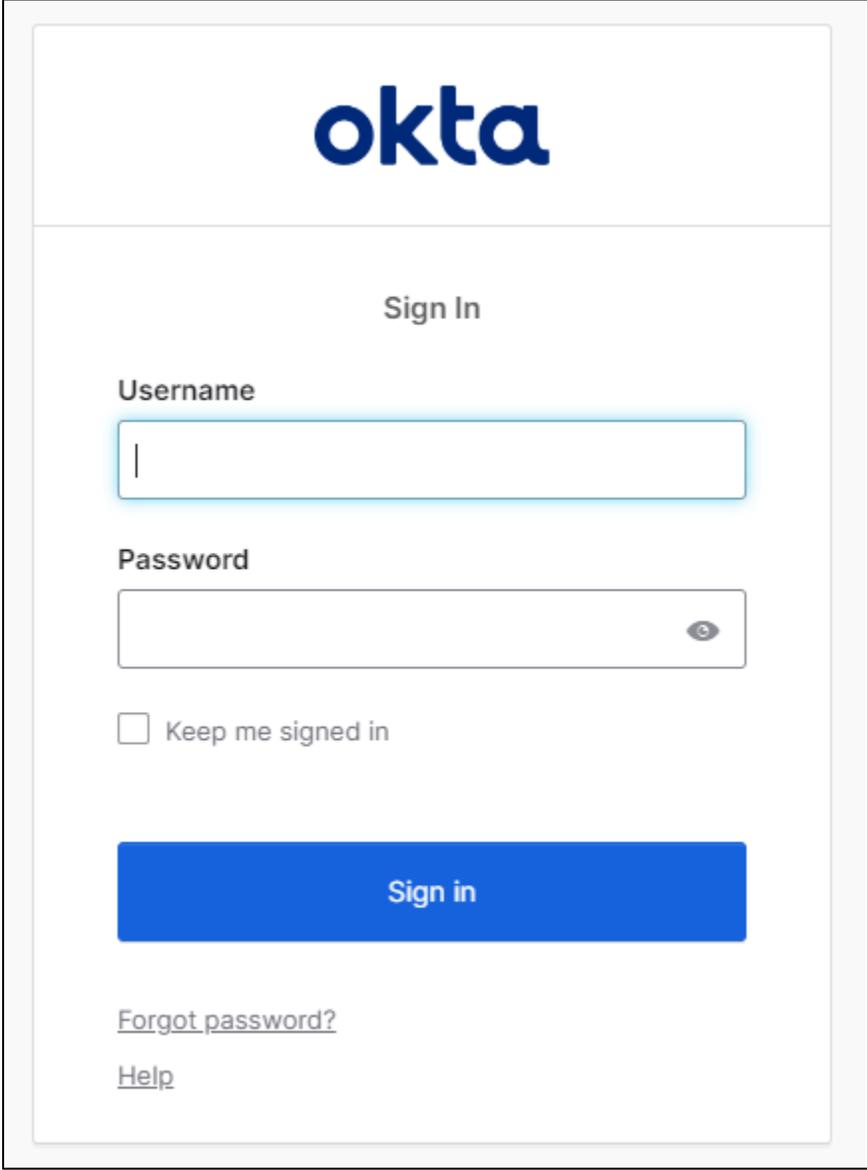
[Help](#)

4) If you have an account in CAASS you will be redirected to the dashboard or your default page in CAASS



IDP-Initiated SSO

1) Log in to Okta



The image shows a screenshot of the Okta Sign In page. At the top center is the Okta logo in blue. Below the logo is the text "Sign In". There are two input fields: "Username" and "Password". The "Username" field is highlighted with a blue glow. Below the "Password" field is a checkbox labeled "Keep me signed in". At the bottom of the form is a blue button labeled "Sign in". Below the button are two links: "Forgot password?" and "Help".

okta

Sign In

Username

Password

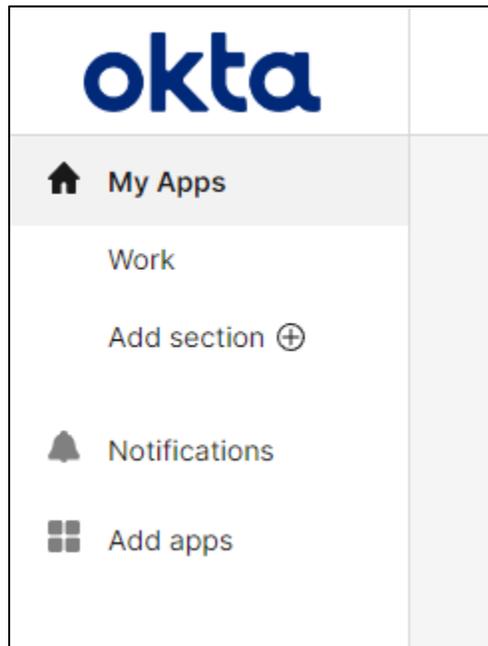
Keep me signed in

Sign in

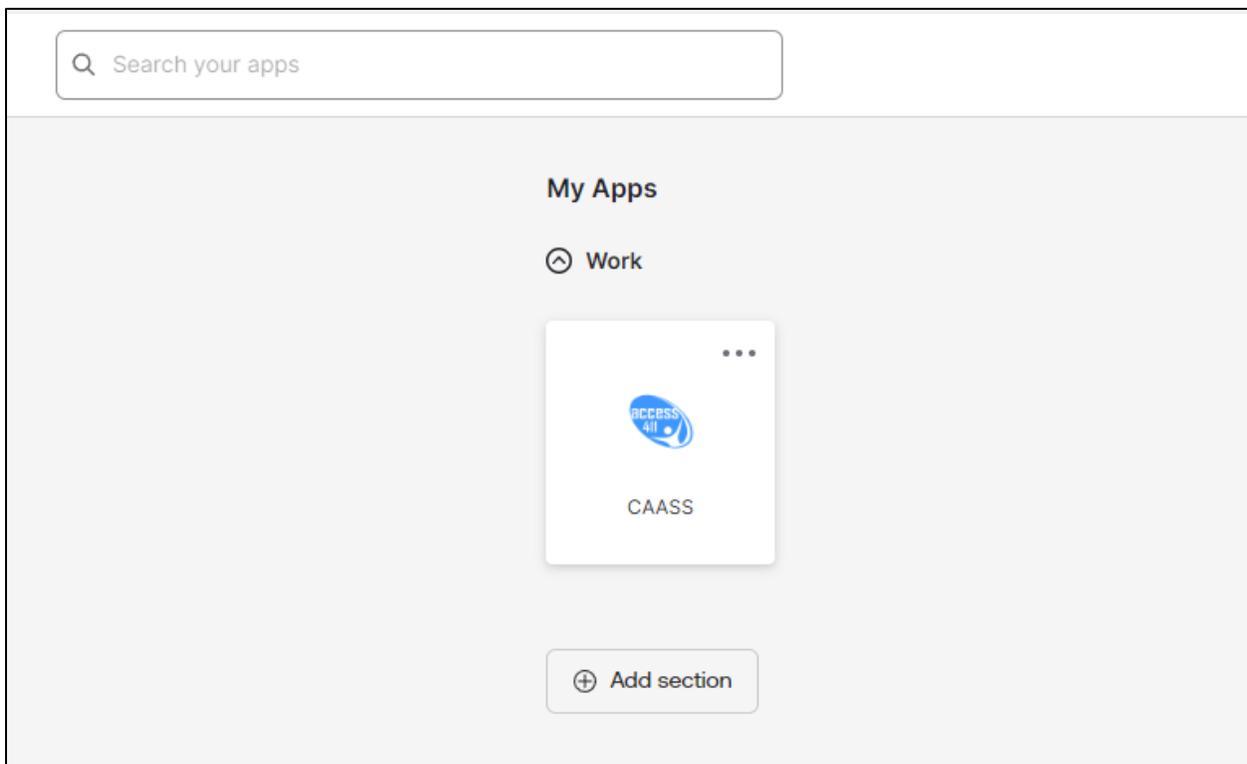
[Forgot password?](#)

[Help](#)

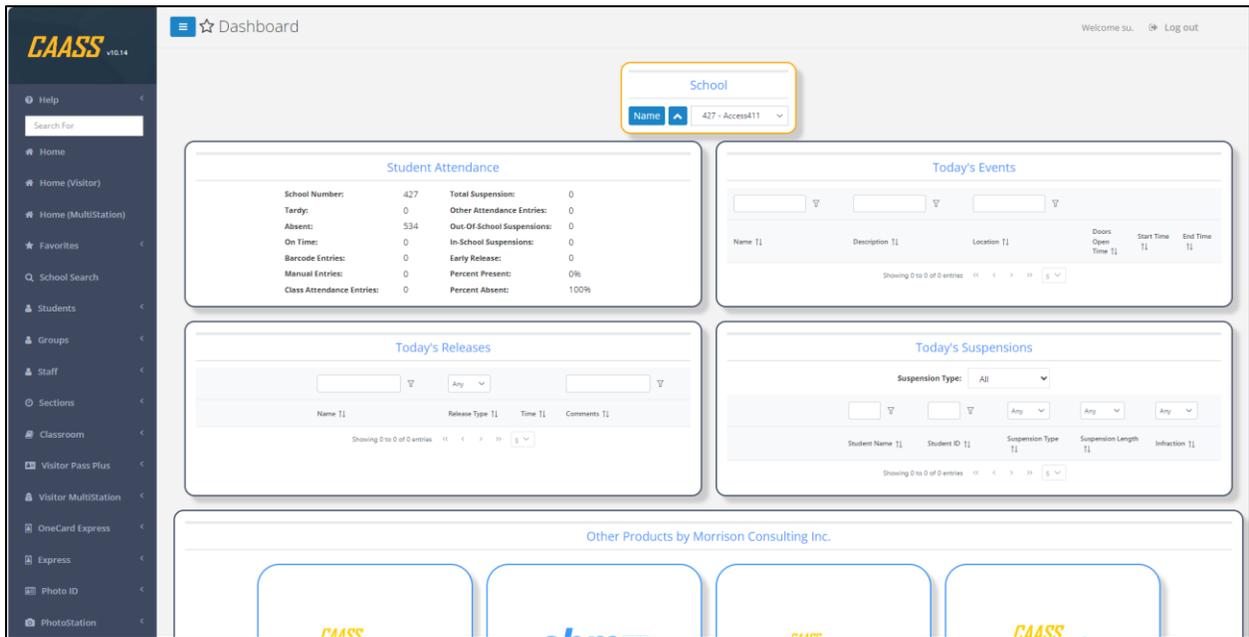
2) Go to My Apps



3) Double Click on CAASS



4) If you have an account in CAASS you will be redirected to the dashboard or your default page in CAASS



Troubleshooting

No users can log in

If no one is able to log in please make sure the integration is set up correctly

- Double-Check that you entered the District Code you received from Access411

This label displays under the app on your home page

District

Application visibility Do not display application icon to users

- Double-Check that Access411 received the Metadata.xml for your application

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<md:EntityDescriptor xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata" entityID="http://www.okta.com/exkiq381uwGHGD5aj5d7">
  <md:IDPSSODescriptor WantAuthnRequestsSigned="false" protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">
    <md:KeyDescriptor use="signing">
      <ds:KeyInfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
        <ds:X509Data>
          <ds:X509Certificate>MIIDqDCCApCgAwIBAgIGAIZETj2bcMA0GCSqGSIb3DQEBCwUAMIGUMQswCQYDVQQGEwJVUzETMBEG A1UECAwKQ2FsaWZvcml
          ARYNaw5mb0Bva3RhLmNvbTAEFw0yNDA4MDIxNDQ2MzBaFw0zNDA4MDIxNDQ3MzBaMIGUMQswCQYD VQQGEwJVUzETMBEGA1UECAwKQ2FsaWZvcml5YT
          MBoGCSqGSIb3DQEJARYNaw5mb0Bva3RhLmNvbTCCASIAwDQYJKoZIhvcNAQEBBQADggEPADCCAQoC ggEBAN2Oyfa4Qw7CdlovBvzT3K0TEtjA6TeV7E
          Q1qau/8er/w0APy0Zdu7ZI/qIFxvVzx0wi25JLviif7tgZrcI26+r60639zTL1hKofNYDjly3grw hCatgW04cPCDFX1Tm5zXKey4veKvuNuEgcj0eV
          qigfwPMU5ff4+w7gaCbL7Bqp73xoVpPykYeyA+hgSB1604A/9nCMN6QDtqoX804M0IyegpMZ84gh 2E4v9+C1CL3jjNtnhzJCeDgmbQmbh/64amgtZ6
          oIsjWcprPQgTGSYmt8HQ+PaS8sN6g3EfwUGzb0pJ3LE10IA0pfJzjOf49n5Wkb7IRmUgnwu0ExGV A+kCLYHS93bwZ5+2DMHXvetp+Z1y3VngAKXaUg
          </ds:X509Certificate>
        </ds:X509Data>
      </ds:KeyInfo>
    </md:KeyDescriptor>
    <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
    <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress</md:NameIDFormat>
    <md:SingleSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST" Location="https://dev-17618442.okta.com/>
    <md:SingleSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect" Location="https://dev-17618442.okta.com/>
  </md:IDPSSODescriptor>
</md:EntityDescriptor>
```

- Double-Check that you assigned the CAASS application to users in Okta

General Sign On Import Assignments

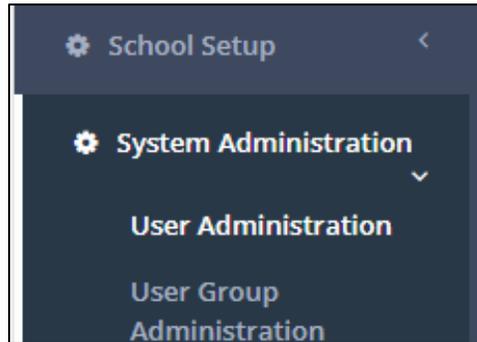
Assign Convert assignments Search... People

Filters	Person	Type
People	Steven Schwarz sschwarz@access411.com	Individual
Groups	Test Account testaccount@access411.com	Individual

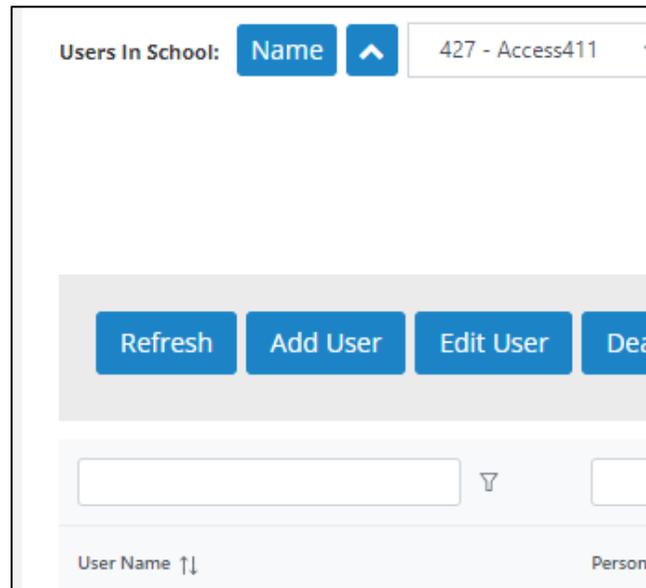
A User is unable to log in

If some users are able to log in but one user is having issues, please make sure they have an account set up in CAASS. To set up a user account:

- 1) Go to the User Administration page in CAASS



- 2) Press Add User



- 3) Fill in the user's information. NOTE: their **Username** in CAASS will have to match their **Email Address** in Okta.

Person Name | Original School | Belones to School

Add User

User Details

Username: sschwarz@access411.com

Pick a person/staff member

School: 427 - Access411

Staff Member: Abby Weeks - 427_52423 Hide Inactive

Add Staff

User Level: School Level

Next >

Finish Close

- 4) When you are finished filling out their information and assigning roles, press Finish. Now the user should be able to login with their Okta account.

Email/Messaging

< Back

Finish Close

If you are still unable to login please contact support at support@access411.com or start an online help session at <https://www.access411.com/online-support/>