

OKTA CONFIG GUIDE

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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

My Apps		LAASS HEH	School
⊘ Work		Help Search For	Name 🗖 427-Accent11 v
0		# Home	Student Attendance
	•	Home (Visitor)	School Number: 427 Total Suspension: 0 Tante: 0 Other Attendance Entries: 0
		Home (MultiStation) Encoderate	Absent: 534 Out-Of-School Supersions: 0 On Time: 0 In-School Supersions: 0
		Q. School Search	Barcode Entries: 0 Early Release: 0 Manual Entries: 0 Percent Present: 0%
access		& Students	Class Attendance Entrine: 0 Percent Absent: 100%
		🛓 Groups 🦿	Today's Releases
		🛦 staff 🔨	Υ My V Υ
CAASS		O Sections (Name 11 Relaxe Type 11 Time 11 Comments 11
		a Classroom	Shaving bis 2 of 2 million ≪ < → = <u>3 v</u>
		EB Visitor Pass Plus C	

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.

PN Notification		Edit
PN Required Notification	Disabled	
.pp Embed Link		Edit
nbed Link		
u can use the URL below to sign in	nto CAASS from a portal or other location ou	itside of Okta.
nttps://dev-17618442.okta.com/ho 17618442_caass_2/0oaiq38luzH3s	ome/dev- NbH45d7/alniay8hnjZW8Djh25d7	
https://dev-17618442.okta.com/ho 17618442_caass_2/0oaiq38luzH3s oplication Access Error Page	ome/dev- NbH45d7/alniay8hnjZW8Djh25d7	

Configuration Steps

1) Log in to Okta

okta	
Sign In	
Username	
user@access411.com	
Password	
•••••	0
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

pplications > Catalog > All	Integrations	
Browse App Inte	gration Catalog	Create New Ap
Use Case		
All Integrations 7905	Q CAASS	\bigotimes
Apps for Good 13	All Integrations	Sort by: Default
Automation 198		
Centralized Logging 49	FEATURED	See all
Directory and HR Sync 80		
Bot or Fraud Detection 9	salesforce Single Sign-On	Single Sign-On
Identity Proofing 49	Salesforce.com	ServiceNow UD
Identity Governance and 69	Sign into salesforce.com and	Sign into servicenow.com and
Administration (IGA)	automate onboarding and	automate onboarding and
Lifecycle Management 713	offboarding processes	offboarding processes
Multi-factor 66	Workflow Templates SWA	SAML Workflow Templates SWA
Authentication (MFA)	Workflows Connectors SAML	Workflows Connectors SCIM
Risk Signal Sharing 11		
Conicil Login 10	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	CAASS
	This label displays under the app on your home page
District	Baltimore
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

General	Sign On	Import	Assignments

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

	Password	reveal		Allow users to password (Rec	securely see commended)	their
:	SAML Sig	gning Certific	cate	es		
	Generate	e new certificate				
	Туре	Created	Exp	ires	Status	Actions
	SHA-2	Jul 19, 2024	lul.	19 2034	Active	Actions *

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

Gener	rate new certificate			
Туре	Created	Expires	Status	Actions
HA-2	Jul 19, 2024	Jul 19, 2034	Active	Actions •
				View IdP met

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

This XML file does not appear to have any style information associated with it. The document tree is	shown below.	9	F
<pre>w<md:entitydescriptor)<="" entityid="http://www.
w<md:IDPSSODescriptor WantAuthnRequestsSigned=" false"="" pre="" protocolsupportenumeration="urn:oasis" xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata"></md:entitydescriptor></pre>	okta.com/exkig66rilW6BUtls5d7"> is:names:tc:SAML:2.0:protocol">	0	с
<pre>▼<md:keydescriptor use="signing"> ▼<ds:keyinfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#"> ▼<ds:x509data></ds:x509data></ds:keyinfo></md:keydescriptor></pre>		•	
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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.





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

	okta
	Sign In
Username	
Password	
	0
Keep me s	signed in
	Sign in
Forgot passwe	ord?
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

	okto	2
	Sign In	
Username		
Password		
		۲
🗌 Keep m	e signed in	
	Sign in	
Forgot pass	sword?	
Help		

2) Go to My Apps



3) Double Click on CAASS

Q Search your apps		
	My Apps O Work	
	•••	
	CAASS	
	⊕ Add section	

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 laber displays under the app on your nome page		
District	Baltimore		
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.					
<pre>\#<md:entitydescriptor entityid="http://www.okta.com/exkiq38luwGHGD5aj5d7" xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata"></md:entitydescriptor></pre>					
<pre><ds:x509certificate>MIIDQDCCApcgAwIBAgIGAZETj2bCMA06CSqGSIb3DQEBCwUAHIGUMQswCQYDVQQGEwJVUzETMBEG A1UECAwKQ2FsabUzvcm ARYNaWSmb0Bva3RhLmNvbTAeFw0yNDA4MDIxNDQ2MzBaFw0zNDQAMDIxDQ3MzBaMIGUMQswCQYD VQQGEwJVUzETMBEGA1UECAwKQ2FsabUzvcm5pYT MBoGCSqGSIb3DQEJARYNaWSmb0Bva3RhLmNvbTCCASIwDQYJKoZIhvcNAQEBBQADggEPADCCAQoC ggEBAN20yFA4Qw7CdlovBvzI3K0TEjA6TeV7E Q1qau/8er/W0APy02du7ZI/q1fXvVzxOWi25JLviif7tgZrcI26+r60639zTLihkofNYDJJy3grw hCatgw04cPCDFXITm5zXKey4veKvuNuEgcj0eV qigfwPMU5ff4+W7gaCbL7Bqp73xoVPpYkJeyA+hgSB1604A/9ncTM60DtqoX804M0JyegpMZ84gh 2E4v9+C1CL3jjNtnhzJCeDgmbQmbh/64amgtZ6 oIsjWcpPQgTGSYNt8HQ+PaS8sN6g3EfwUGzb0pJ3lE10IA0pfJzj0f49n5WKb7IRmUgnwu0ExGV A+kcLYHS93bWZ5+2DMHXvetp+Z1y3VngAKXaUg </ds:x509certificate></pre>					
<pre><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> </pre>					

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

Assign 🔻	Convert assignments •	Q Search	People	•
Filters	Person	Туре		
People Groups	Steven Schwarz sschwarz@access411.com	Individual	1	×
	Test Account testaccount@access411.com	Individual	1	×

A User is unable to log in

If some users 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

Use	rs in School:	Name 🔺	427 - Access4	11 🗸
	Refresh	Add User	Edit User	Dea
			Y	
Us	er Name †↓			Person I

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

	Person	n Name	Original School	Belongs to School				
l	Add User						×	
			Us	er Details				I
	User Details	Username:	sschwarz@acce	ess411.com				
l			Pick a per	son/staff member				
De	Schools	School:	427 - Access4	11 ~	_			l
		Staff Member:	Abby Weeks -	427_52423 ~	\checkmark	Hide Inactive		ł
	Roles		Add Staff					
2154		User Level:	School Level	~				at Ro
ak	User Groups							Le
ran								Le
ach	Email/Messaging			Next >				Le
TEN			Finish	ose				Le

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.

ich	Email/Messaging	< Back	: 1	
EV		Finish Close		1

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