Okta SSO & SCIM Guide

Getting Started

Accessing your user-based license

You can find your new SSO/SCIM User Licensing subscription in My Account:

- Navigate to www.snapgene.com/account
- Log in with your existing credentials
- From the header drop down, select your user based subscription

Preparing SnapGene

In order to follow the below steps to enable your SSO/SCIM configuration, you will need to be using at least version 8.0 (or 8.1 for Ubuntu) of SnapGene, and have deactivated your existing SnapGene activation.

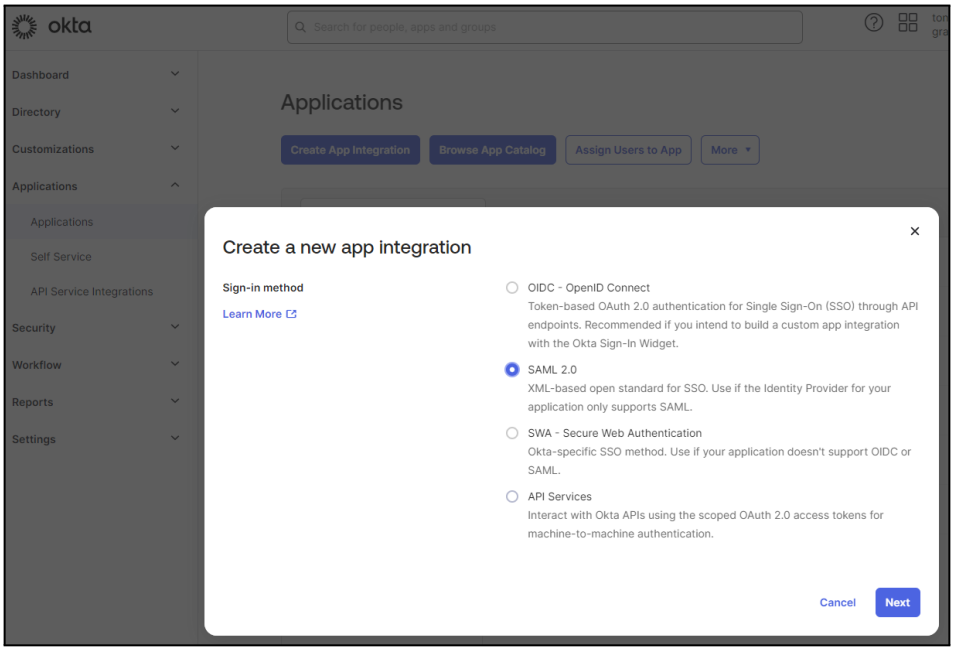
- To download the latest version, visit our Updates page, or update via the in-app updates feature
- Deactivate your current license by following **Help -> Manage License...**
- Let the SnapGene team know if your deactivation limit needs to be extended
- After deactivation, SnapGene should display the activation screen, or reopen in Viewer mode. You are now ready to apply your SSO and/or SCIM configuration following the steps below.

Okta Configuration

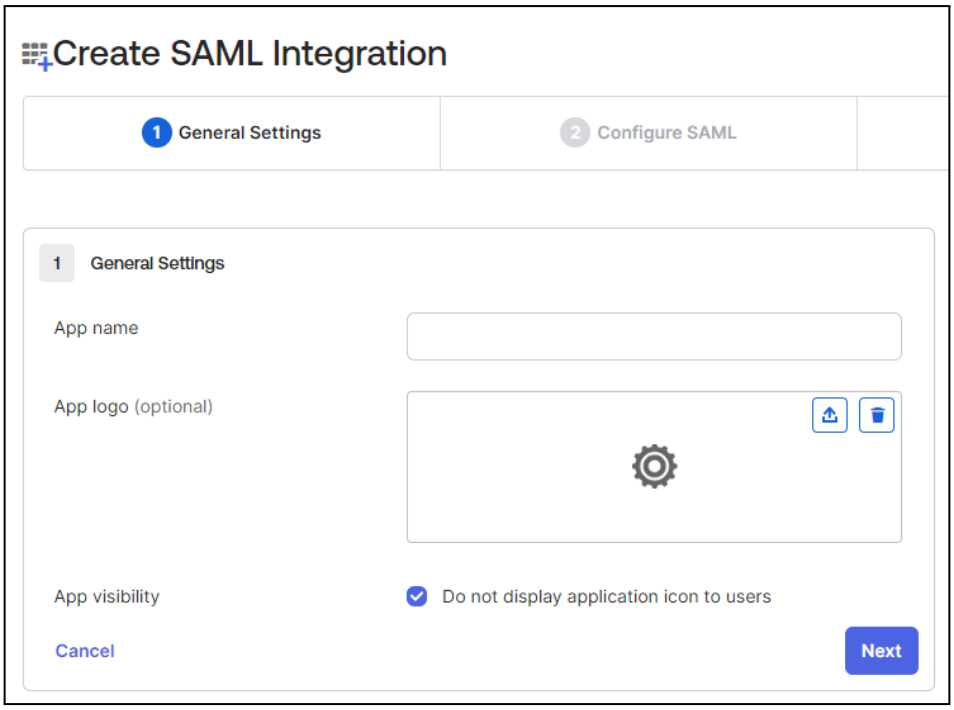
To use Okta as your vendor, please follow the steps below to configure your application. The first two sections detail instructions for setting up SnapGene as an SSO application in Okta, while the third configures SCIM for identity management.

Creating an Application in Okta

1. From the Admin menu, select **Applications -> Applications** from the side menu. From here, select **Create App Integration** and select **SAML 2.0**. Click **Next**:



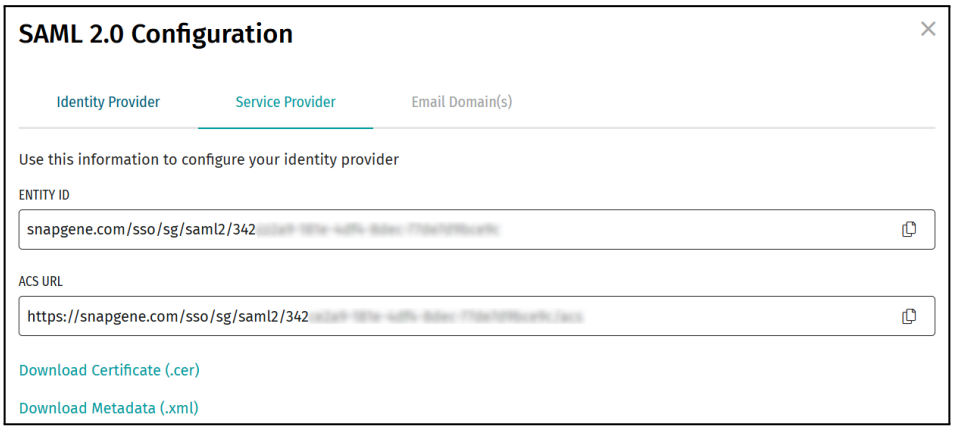
2. Add the application name e.g. SnapGene and any other display customisation you would like
3. Tick **Do not display application icon to users** for **App visibility**
4. Click **Next**:

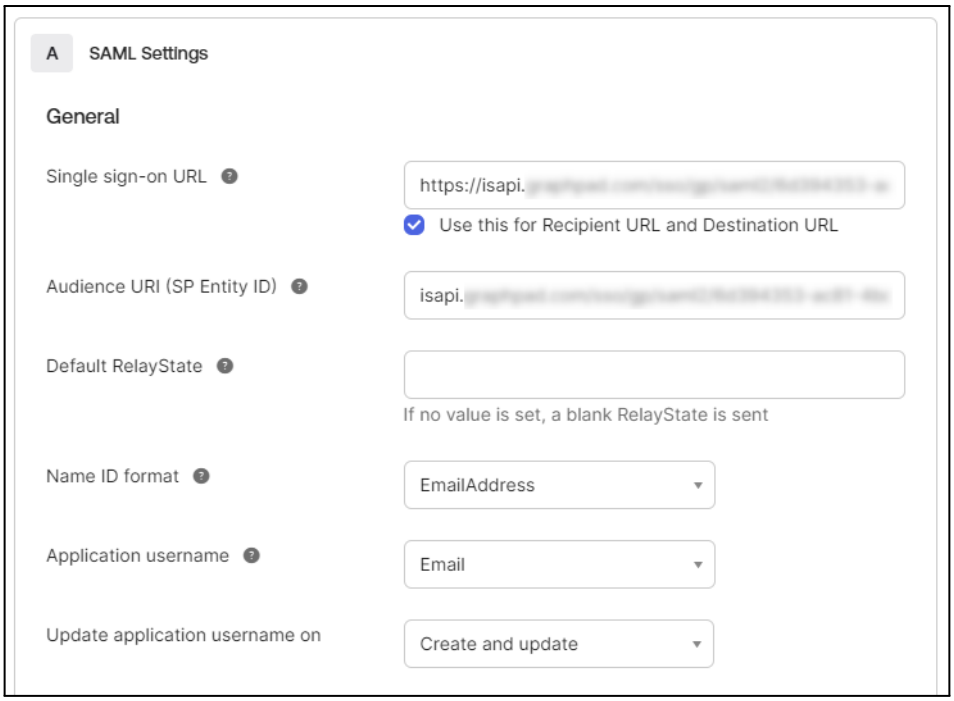


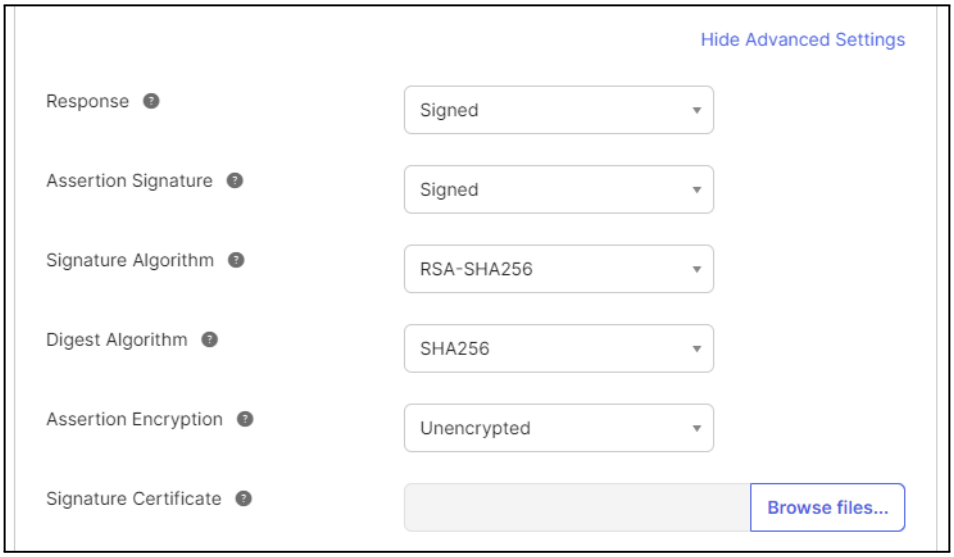
Single sign-on (SSO) Configuration

You'll next be presented with further configuration options in the **Configure SAML** step of Okta. Before continuing here, you will need to configure SnapGene's My Account, and use information from here to configure Okta.

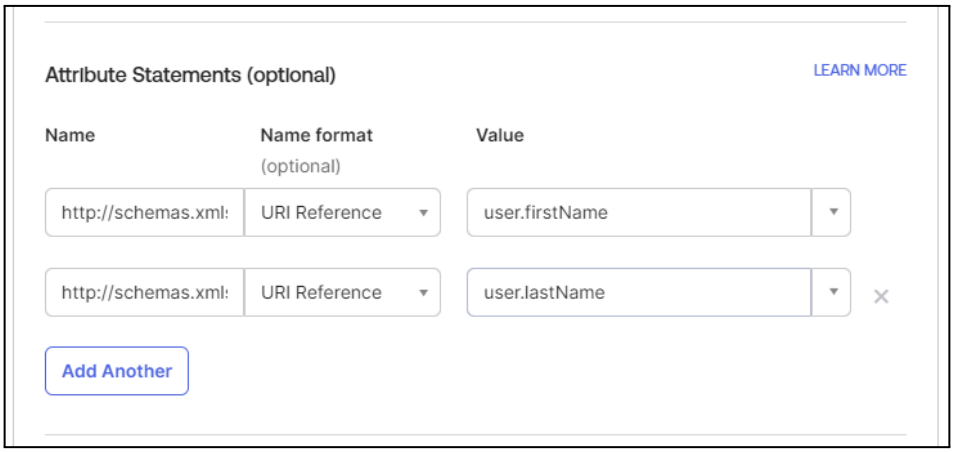
1. From My Account, select **Manage Seats**, then **Authentication**
2. Add a SAML2 **ID Provider**
3. Switch to the **Service Provider** tab and copy the **ACS URL**. Paste this into Okta as the **Single sign-on URL**
4. Also copy the **Entity ID** from My Account and paste this into Okta as the **Audience URI**
5. Set the **Name ID format** to **EmailAddress**
6. Set the **Application username** to **Email**
7. Expand the **Advanced Settings** and confirm the following details are correct:



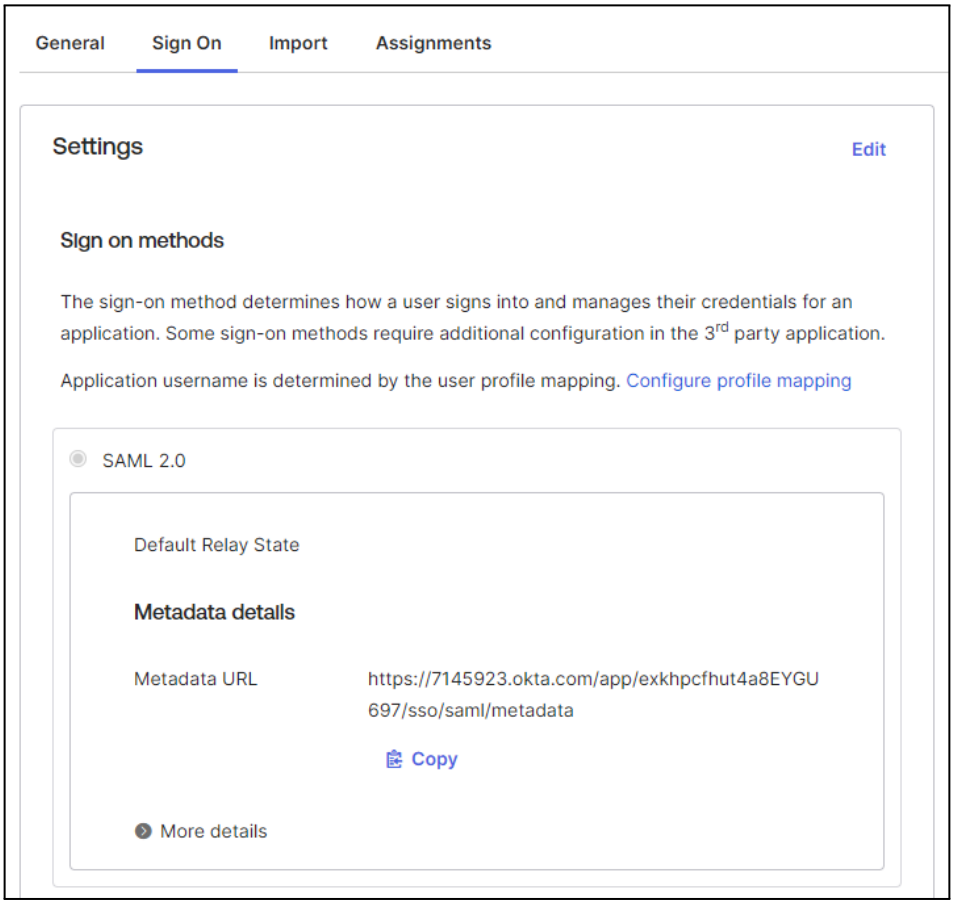




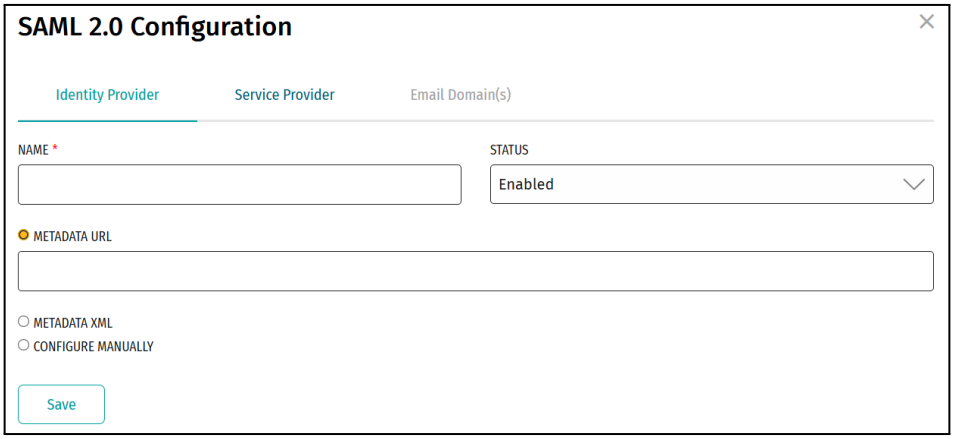
8. Add the following two **Attribute Statements**, using **URI Reference** as the **Name format**:
   - `http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname` - user.firstName
   - `http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname` - user.lastName



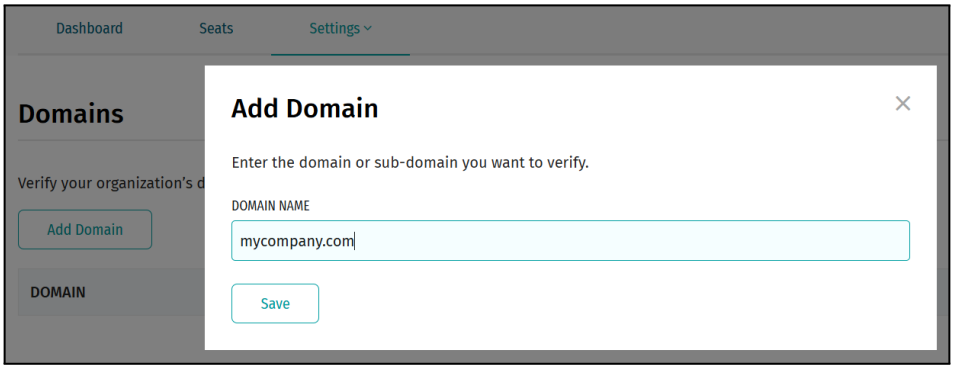
9. Click **Next** and **Finish**
10. You will be presented with your Okta **Metadata URL** for this integration. Copy this.



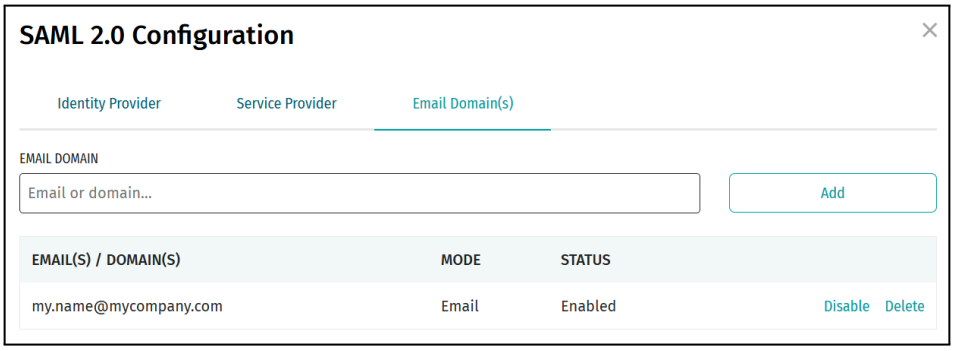
11. Return to My Account and switch to the **Identity Provider** tab. Enter a name e.g. “Okta”, and paste in the Metadata URL from Okta. Click **Save**:



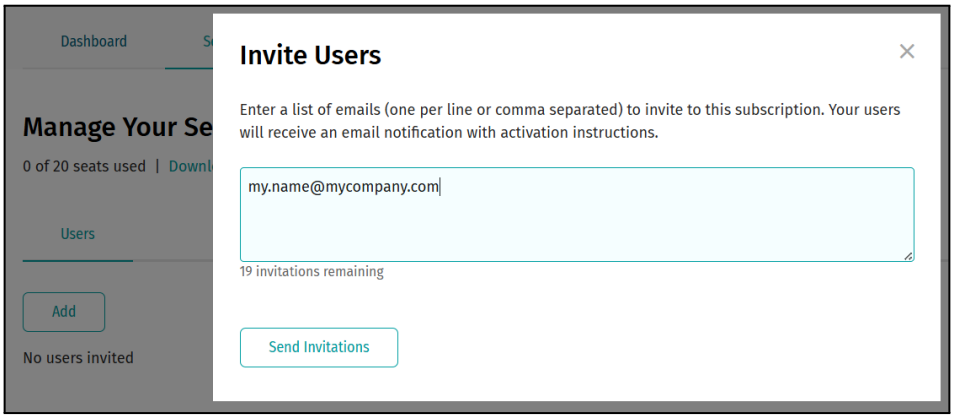
12. Navigate to the **Domains** tab and add the email domain(s) that you wish to be able to use with SSO. Click **Save**:



13. You will need to verify ownership of this domain. Click **View** and follow the on-screen instructions to verify this, either by HTML file or DNS TXT record.
14. Once verified, return to the **Authentication** tab, and use the **Email Domain(s)** SAML tab to provide email addresses and/or email domains SSO access to SnapGene. **First, test SSO access with a single email address by adding that email address in full:**

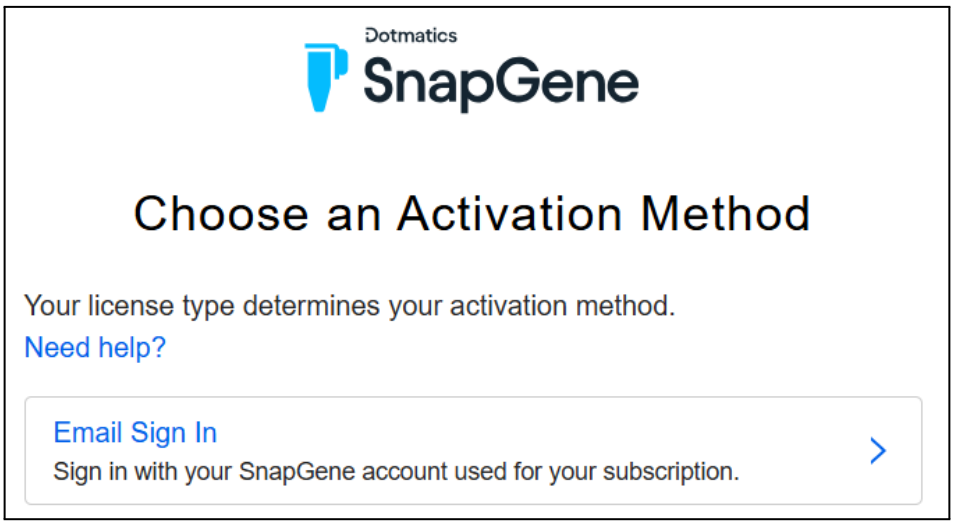


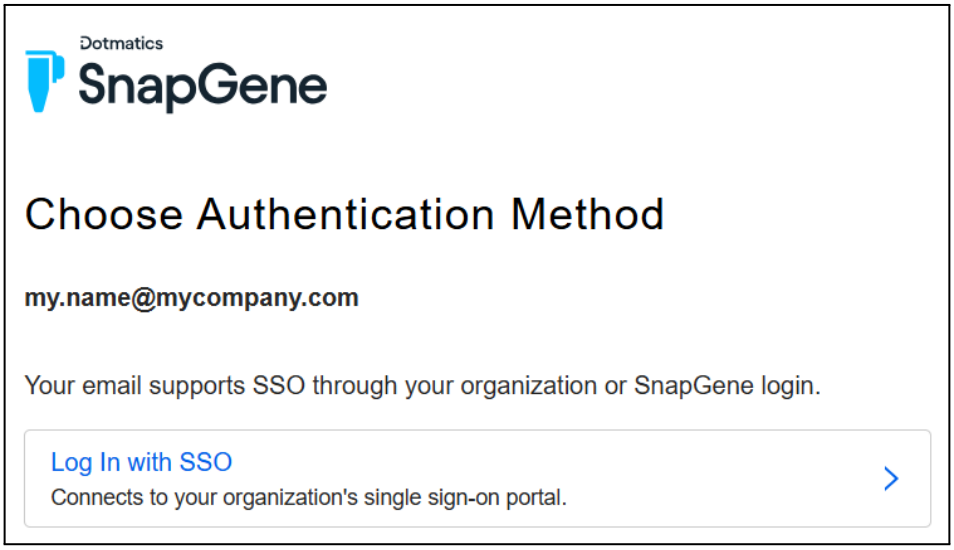
15. If you are using Okta only for SSO, and not SCIM, you will need to invite these user(s) under the **Users** tab in My Account. Otherwise, SCIM users will be provisioned from Okta in the SCIM configuration section later in this guide.

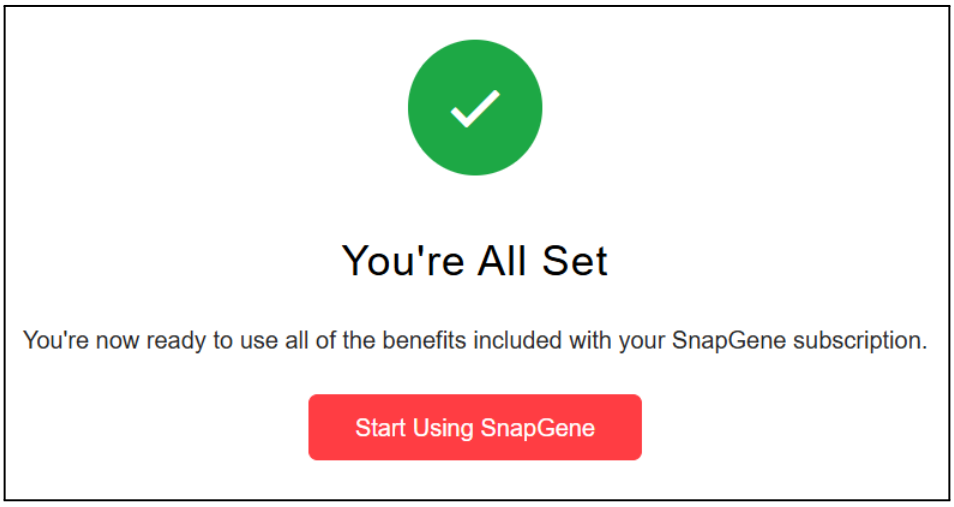


16. If this user does not yet exist in Okta, create them in Okta now.
    From Okta, assign this user to your application from the Assignments tab.
    If you are also configuring SCIM, then this process will instead be done later after provisioning has been configured (see the SCIM section of this guide for provisioning users). Leave the **Username** unchanged as their email address. Click **Save**:

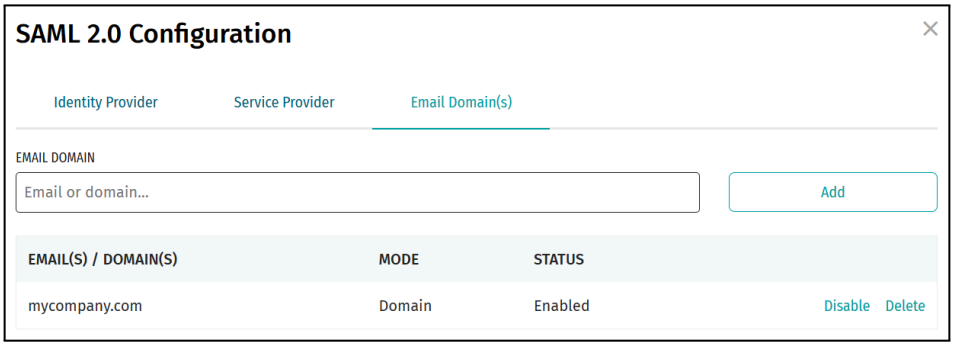
17. In the SnapGene application, activate your software, selecting the **Email Sign In** option. Continue through the screens, selecting **Log In with SSO** as your authentication method:





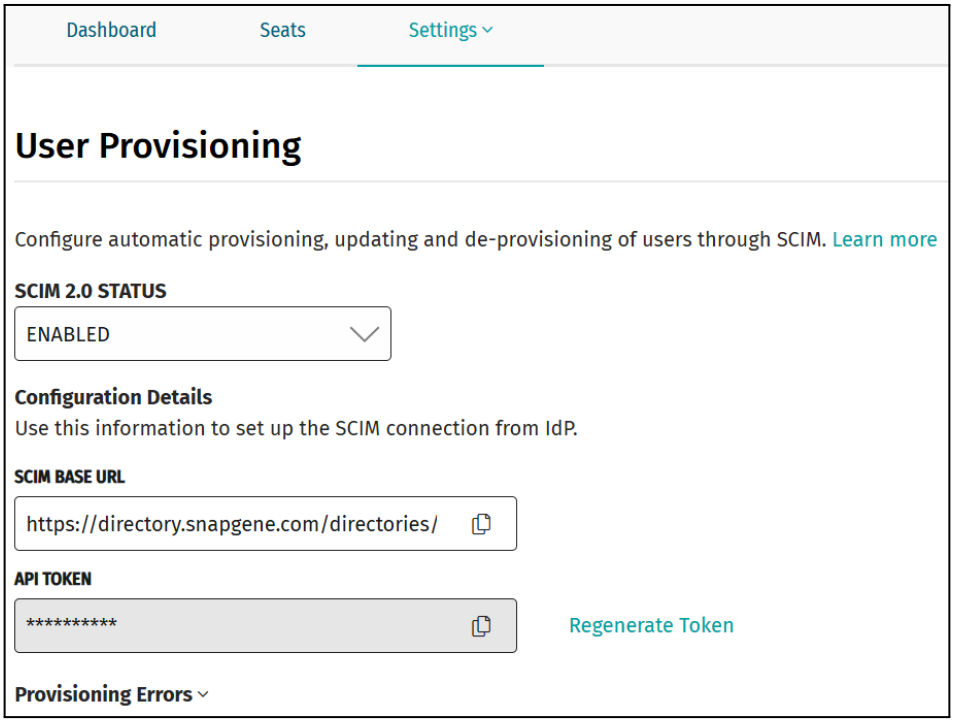


18. Once you have verified that SnapGene activates with this method, and are ready to enable SSO for your entire domain, add the email domain(s) that you wish to use with SSO. Also add the other users in both the **Users** tab of My Account, and in Okta as you have above:

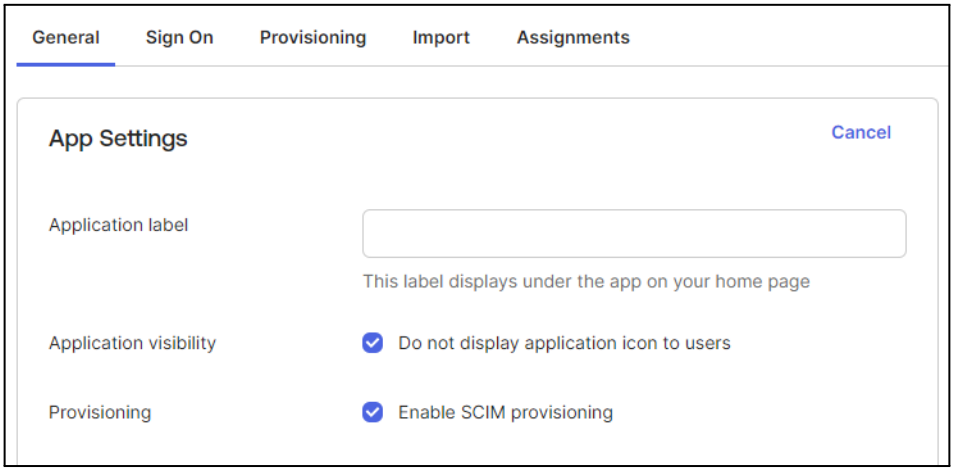


SCIM Identity Management Configuration

1. To configure SCIM, you will first need to retrieve your SnapGene connection details from My Account
    1. From My Account, select **Manage Seats**, then **User Provisioning**
    2. Enable SCIM 2.0 and keep your **SCIM Base URL** and **API Token** handy for the next step:

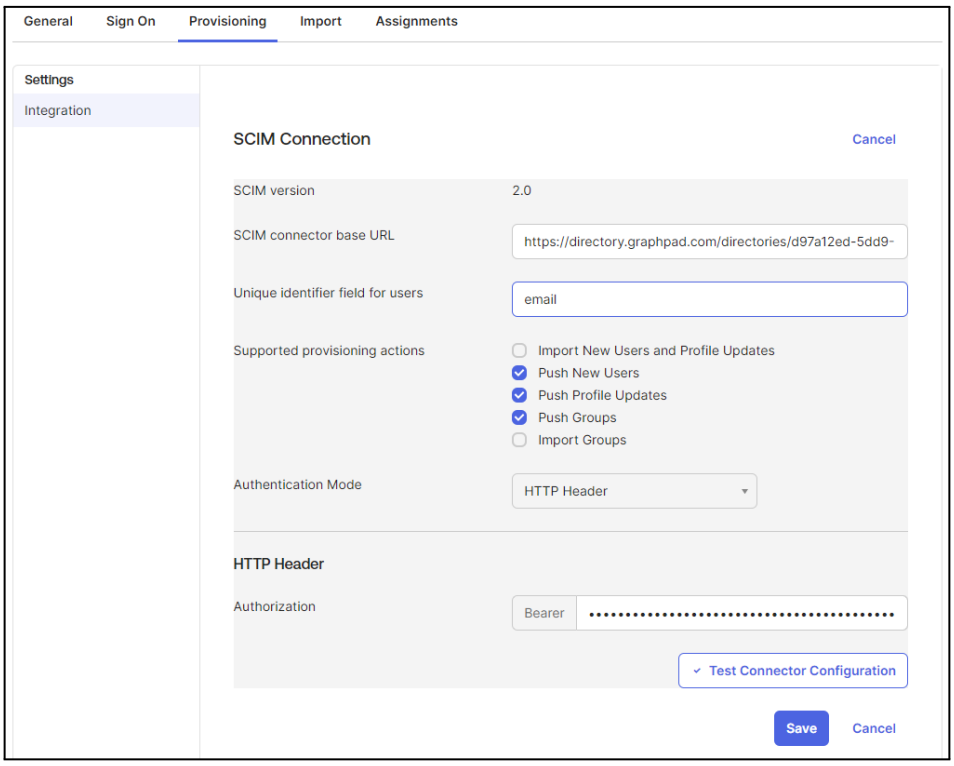


2. Then in the **General** tab of your Okta application, **Edit** the **App Settings**, select **SCIM**, and click **Save**:

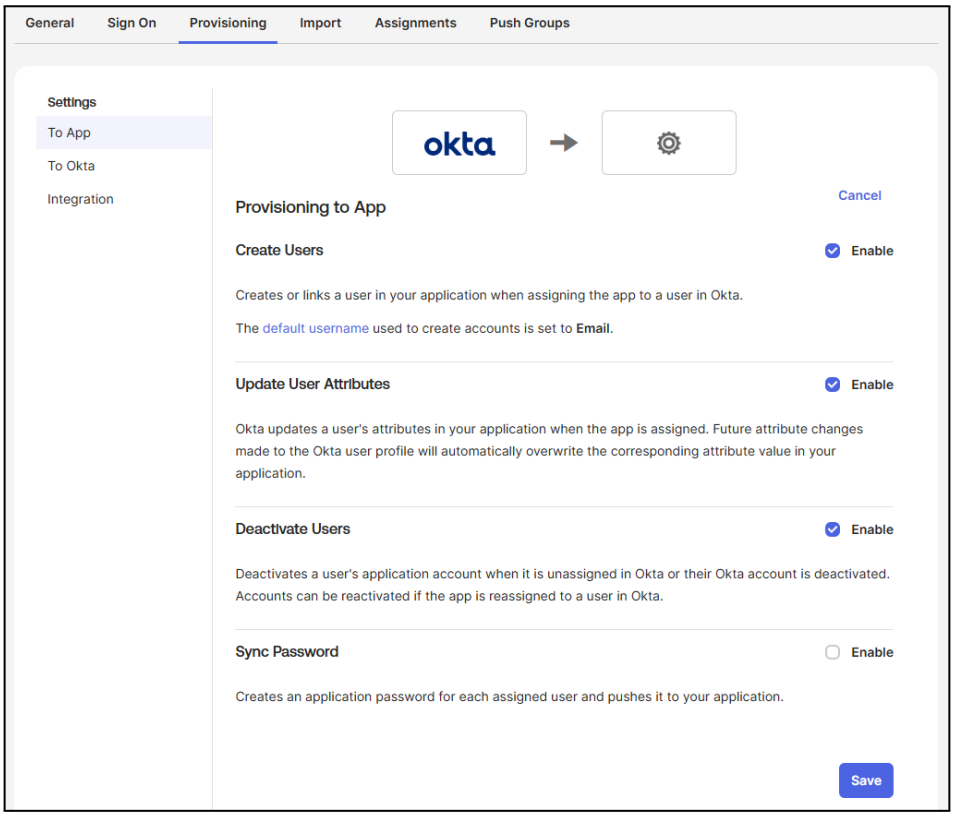


3. Navigate to the **Provisioning** tab and **Edit** the **SCIM Connection**
4. Copy the **SCIM Base URL** from My Account as the **SCIM connector base URL**
5. Enter “email” as the **Unique identifier field for users**
6. Select all the “**Push**” (from Okta to Prism) **Supported provisioning actions**
7. Select **HTTP Header** as the **Authentication Mode**

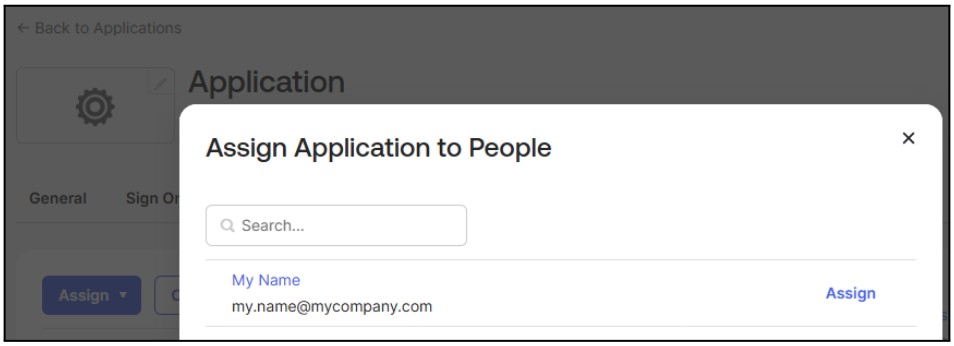
8. Copy the **API Token** from My Account as the **Authorization Bearer Token**
9. **Test** and **Save** the configuration:



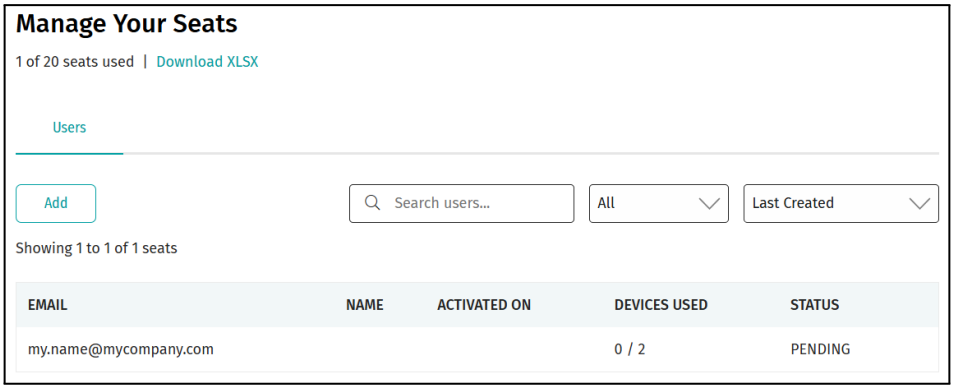
10. In the **To App** menu, click **Edit**, and enable **Create Users**, **Update User Attributes**, and **Deactivate Users**. Click **Save**:



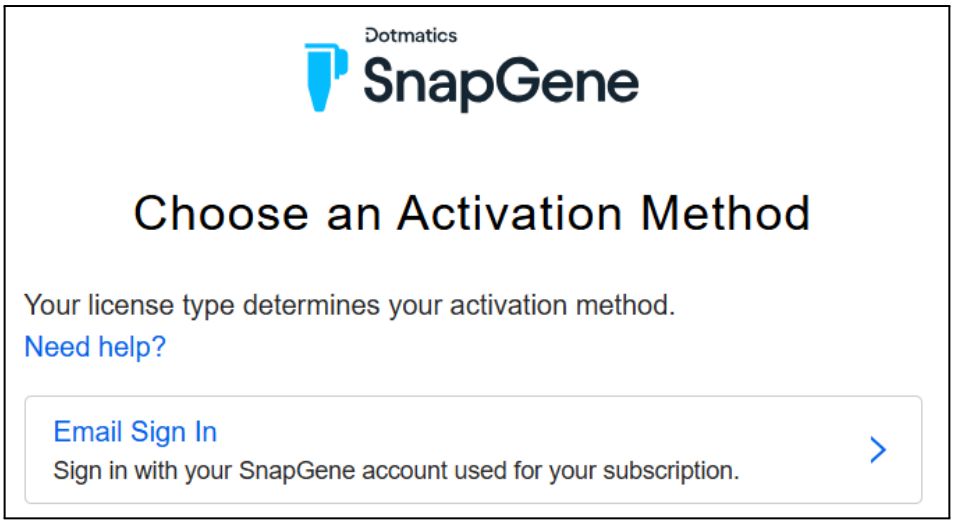
11. You have now successfully configured your user provisioning connection between Okta and SnapGene. You can now provision users from Okta into SnapGene by using the **Assignments** tab in Okta to assign users or groups to SnapGene:

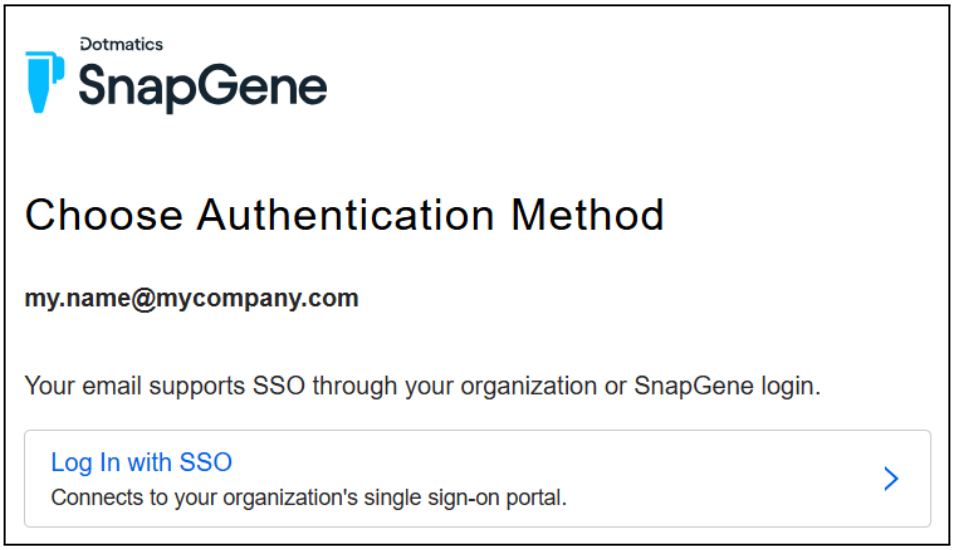


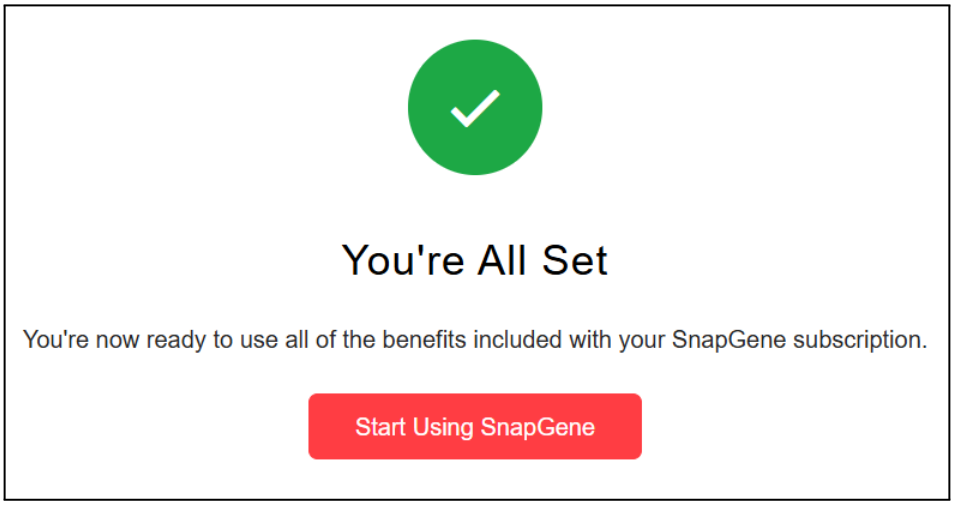
12. Returning to My Account after provisioning is complete will show the end user(s) ready to activate SnapGene in the **Seats** tab - please reload the page:



13. In the SnapGene application, activate your software, selecting the **Email Sign In** option. Continue through the screens, selecting **Log In with SSO** as your authentication method:



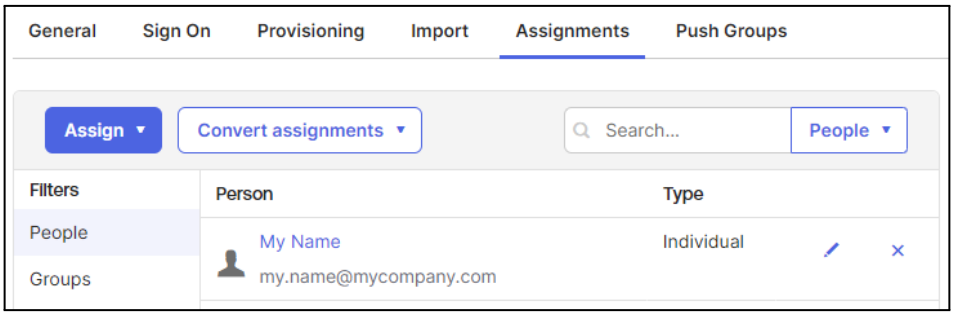




Revoke User

To revoke a user via Okta:

1. In the **Assignments** tab within your Okta application, click the **x** to remove that user:



2. Return to My Account and refresh the page. That user will now be removed from the **Users** list
3. Finally, in SnapGene, follow the **Help -> About SnapGene** menu. Here you will be notified that the activation has been revoked.