

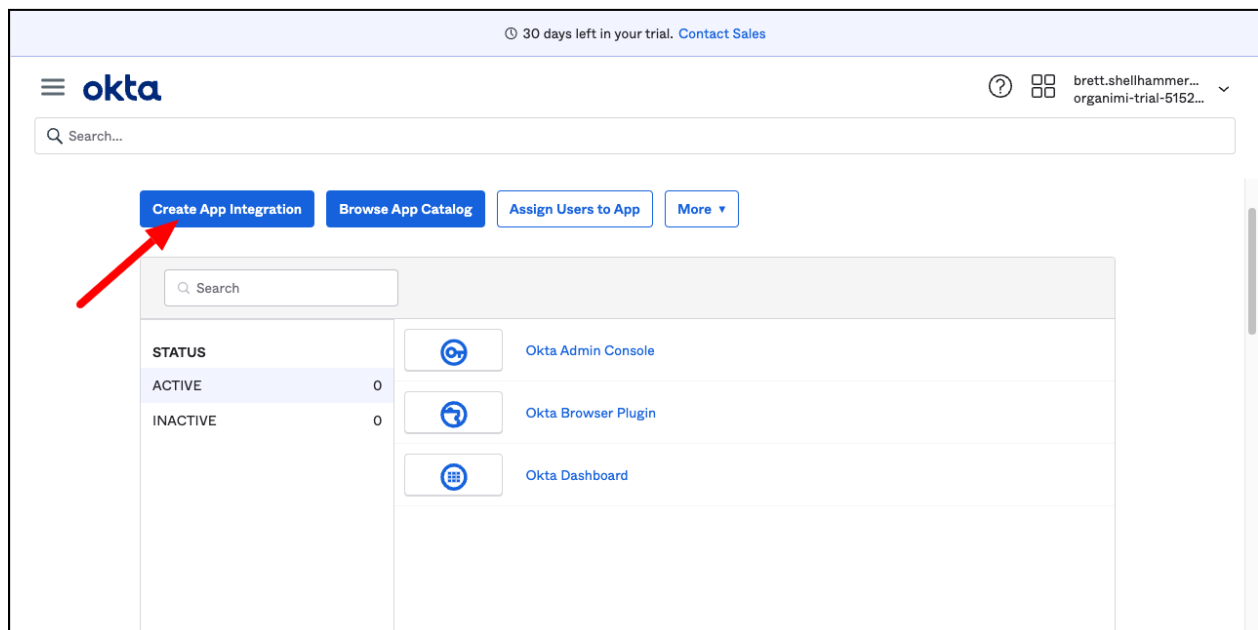


## SAML based SSO - Login with OKTA

Organimi has implemented SAML based SSO for Premium account holders ... this document will walk you through the steps to set up the integration

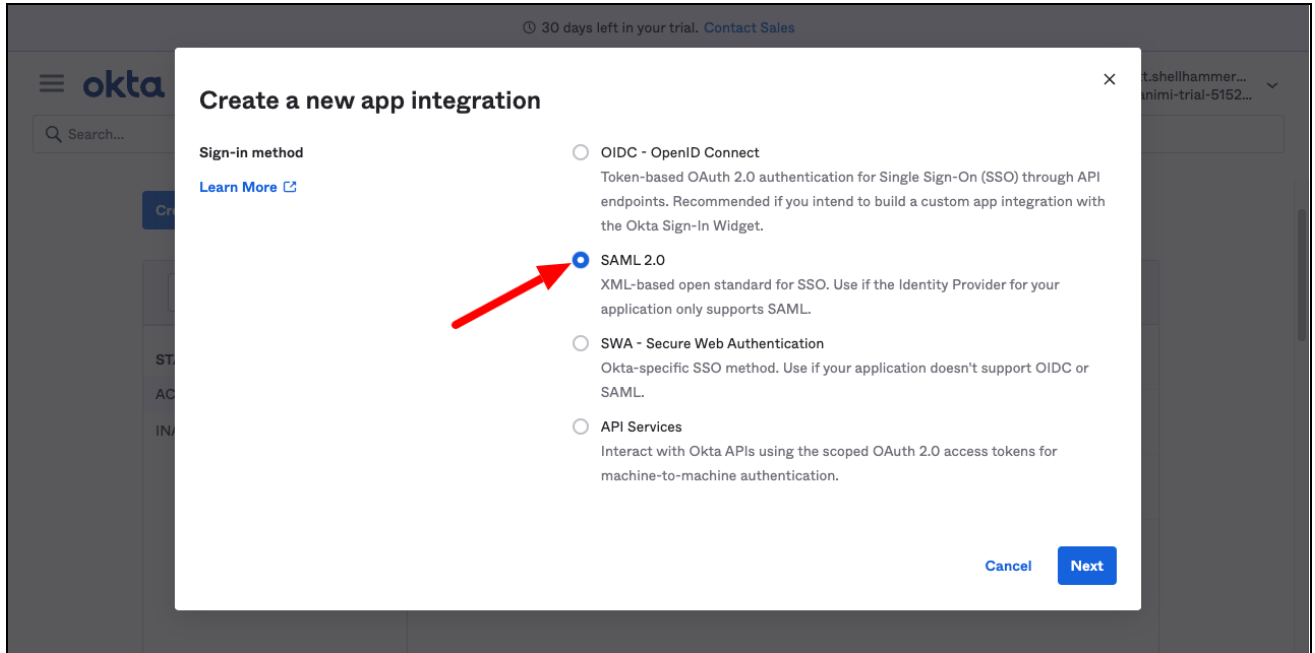
### Step 1

Go to your Okta dashboard and click "Create App Integration" from the Applications tab




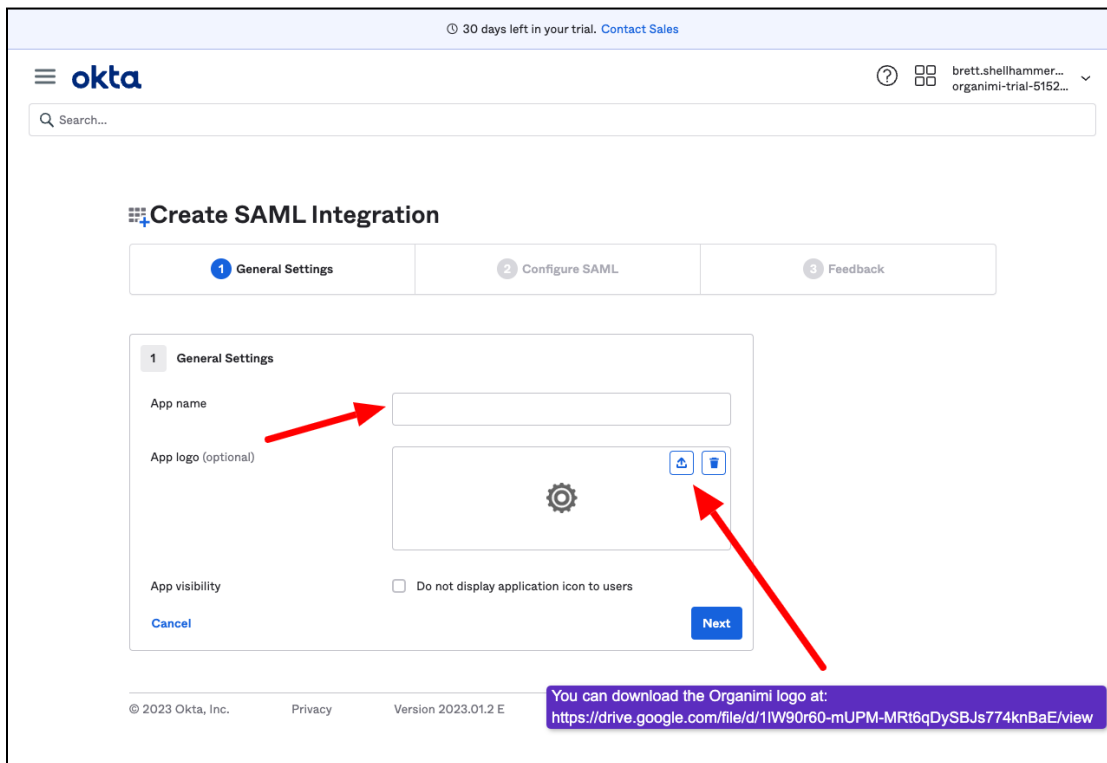
### Step 2

Select SAML 2.0 and click next



### Step 3

Enter App name as “Organimi”, upload Organimi’s logo and click next (you download the Organimi logo at:  Organimi\_LogoOnly.png )



30 days left in your trial. [Contact Sales](#)

okta ? organimi-trial-5152...


Search...

## Create SAML Integration

1 General Settings 2 Configure SAML 3 Feedback

1 General Settings

App name

App logo (optional) 

App visibility  Do not display application icon to users

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

You can download the Organimi logo at:  
<https://drive.google.com/file/d/1IW90r60-mUPM-MRt6qDySBJs774knBaE/view>

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## Step 4

Enter the following information

1. Single sign-on URL: <https://app.organimi.com/api/v7/auth/login/saml/callback>
2. Audience URI (SP ENTITY ID): <https://app.organimi.com>
3. **Default Relay State: {"company":"YOUR-COMPANY-ALIAS"}**
  - a. **Note: Replace the placeholder with your company name. This name will also be required later. And anyone who wishes to login using this IDP, will be asked to enter this name when signing in.**
4. Name ID format: EmailAddress

In order for a user to log into Organimi, we require following three attributes of the user from Okta. Configure them under "Attribute Statements (optional)". The name should be all lowercase, and the value should be matched accordingly.

1. email
2. firstname
3. lastname

**okta** brett.shellhammer...  
organimi-trial-5152...

Search...

## Create SAML Integration

1 General Settings    2 **Configure SAML**    3 Feedback

**A SAML Settings**

**General**

Single sign-on URL    
 Use this for Recipient URL and Destination URL

Audience URI (SP Entity ID)

Default RelayState    
If no value is set, a blank RelayState is sent

Name ID format

Application username

Update application username on

[Show Advanced Settings](#)

**Attribute Statements (optional)** [LEARN MORE](#)

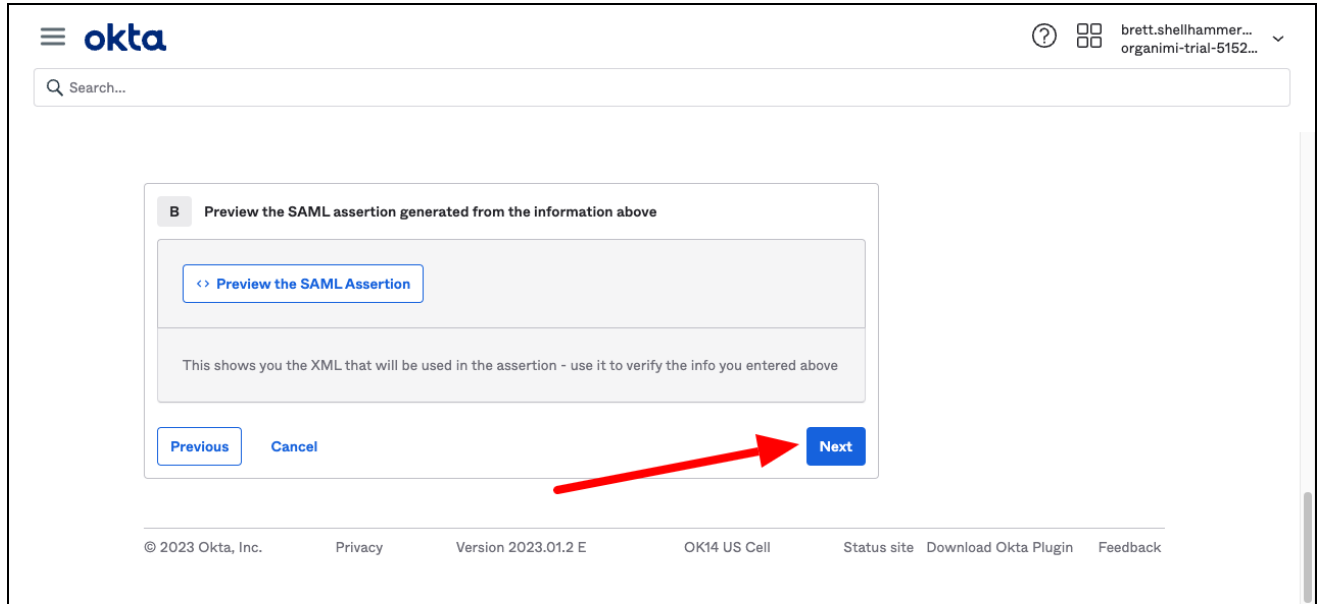
Name	Name format (optional)	Value
email	Basic	user.email
firstname	Basic	user.firstname
lastname	Basic	user.lastname

[Add Another](#)    [select basic for all three](#)

**What does this form do?**  
This form generates the XML needed for the app's SAML request.

**Where do I find the info this form needs?**  
The app you're trying to integrate with should have its own documentation on using SAML. You'll need to find that doc, and it should outline what information you need to specify in this form.

Once all configured, click next at the bottom.



On the “Feedback” tab you can simply click “Finish”

## Step 5

Now that the Organimi App is setup at the Okta side, we now have to configure this IDP in Organimi.

Click “View SAML setup Instructions” ...

Search bar

← Back to Applications



# Organimi

Active



View Logs Monitor Imports

Once you have a working SAML integration, submit it for Okta review to publish in the OAN. [Submit your app for review](#)

General **Sign On** Import Assignments

## Settings

Edit

### 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

Default Relay State: {"company":"zengario-test-nine"}

### Credentials Details

Application username format: Okta username

Update application username on: Create and update [Update Now](#)

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

### About

SAML 2.0 streamlines the end user experience by not requiring the user to know their credentials. Users cannot edit their credentials when SAML 2.0 is configured for this application. Additional configuration in the 3rd party application may be required to complete the integration with Okta.

### Application Username

Choose a format to use as the default username value when assigning the application to users.

If you select **None** you will be prompted to enter the username manually when assigning an application with password or profile push provisioning features.

## SAML Signing Certificates

[Generate new certificate](#)

Type	Created	Expires	Status	Actions
SHA-1	Today	Feb 2033	Inactive ⚠	<a href="#">Actions</a>
SHA-2	Today	Feb 2033	Active	<a href="#">Actions</a>

### User authentication

Edit

Authentication policy: Any two factors [View policy details](#)

### SAML Setup

Single Sign On using SAML will not work until you configure the app to trust Okta as an IdP.

[View SAML setup instructions](#)

All if the data items are included in the last item in the IDP Metadata ... copy this entire field to copy into the setup screen in Organimi.

Search...

## How to Configure SAML 2.0 for Organimi Application

**Note:** These setup instructions include certificate information for this app's most recently created SAML signing certificate. For users to get access to the app using these instructions, that certificate must be active.

### The following is needed to configure Organimi

- 1 Identity Provider Single Sign-On URL:

https://[redacted]okta.com/app/t/[redacted]/connect/[redacted]sso/saml

- 2 Identity Provider Issuer:

http://www.okta.com/[redacted]

- 3 X.509 Certificate:

```
-----BEGIN CERTIFICATE-----
M
A
M
C
A
B
M
C
P
x
2
x
A
o
h
o
2
G
U
B
G
L
x
B
N
U
a
G
B
's
v
F
x
-----END CERTIFICATE-----
```

[Download certificate](#)

### Optional

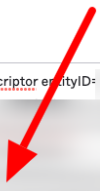
- 1 Provide the following IDP metadata to your SP provider.

```
<?xml version="1.0" encoding="UTF-8"?><md:EntityDescriptor entityID=
```

[Blurred XML content]

```
</md:EntityDescriptor>
```

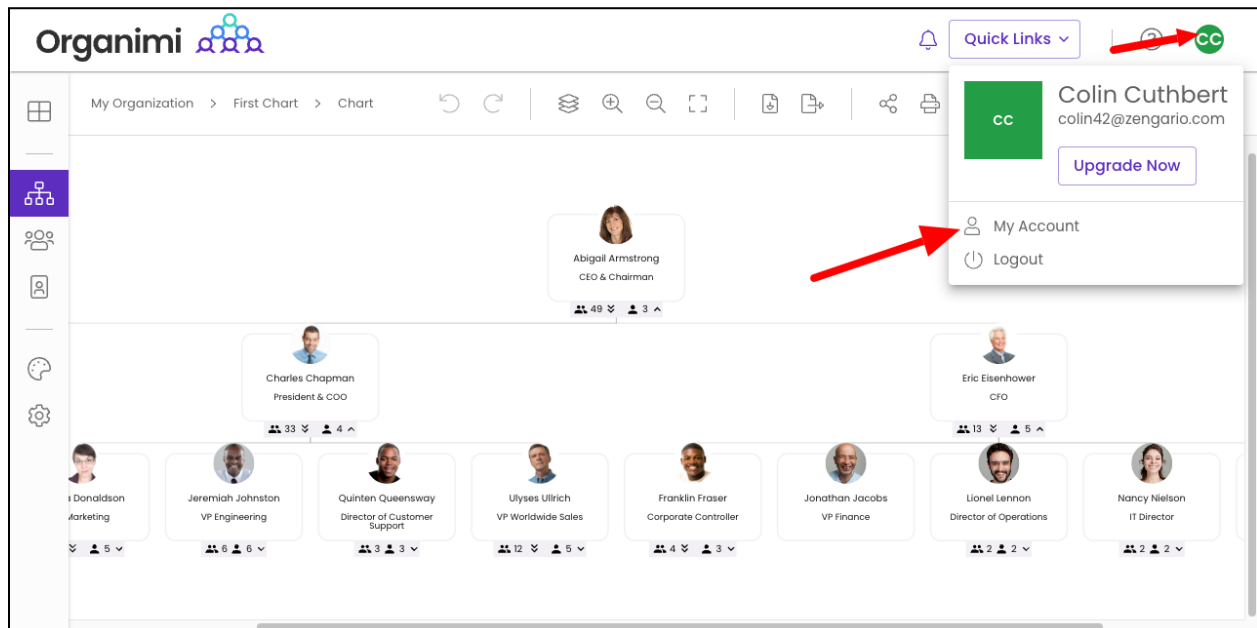
Copy this entire field of IDP metadata and paste it into the SSO setup screen in your Organimi Account





## Step 6

Visit <https://app.organimi.com>, login to your account using any social login, or username/password. Click “My Account” and select the “SSO Settings” tab.



The screenshot displays the Organimi application interface. At the top left is the Organimi logo. The top right corner features a notification bell, a "Quick Links" dropdown, and a user profile icon with the initials "CC". A red arrow points to this icon. Below the navigation bar, the main content area shows an organization chart. At the top of the chart is Abigail Armstrong, CEO & Chairman. Below her are Charles Chapman, President & COO, and Eric Eisenhower, CFO. The bottom row includes several other roles: Donaldson (Marketing), Jeremiah Johnston (VP Engineering), Quinten Queensway (Director of Customer Support), Ulyses Ullrich (VP Worldwide Sales), Franklin Fraser (Corporate Controller), Jonathan Jacobs (VP Finance), Lionel Lennon (Director of Operations), and Nancy Nielson (IT Director). A red arrow points to the "My Account" option in the user profile dropdown menu, which also includes a "Logout" option and an "Upgrade Now" button.

*Note: if you don't see the "SSO Settings" tab? Contact Organimi to have SSO enabled for your account (Premium account required)*

My Info

License

Account Owners

Webhooks

API Settings

**SSO Settings**

Transfer Account

Delete Account

## SAML SSO Config

---

**Service Provider Metadata** [Setup Instructions](#)

Callback URL

SP Entity ID

Default Relay State

Required Attributes

Service Provider Metadata File [Download \(.xml\)](#)

---

**Your Identity Provider**

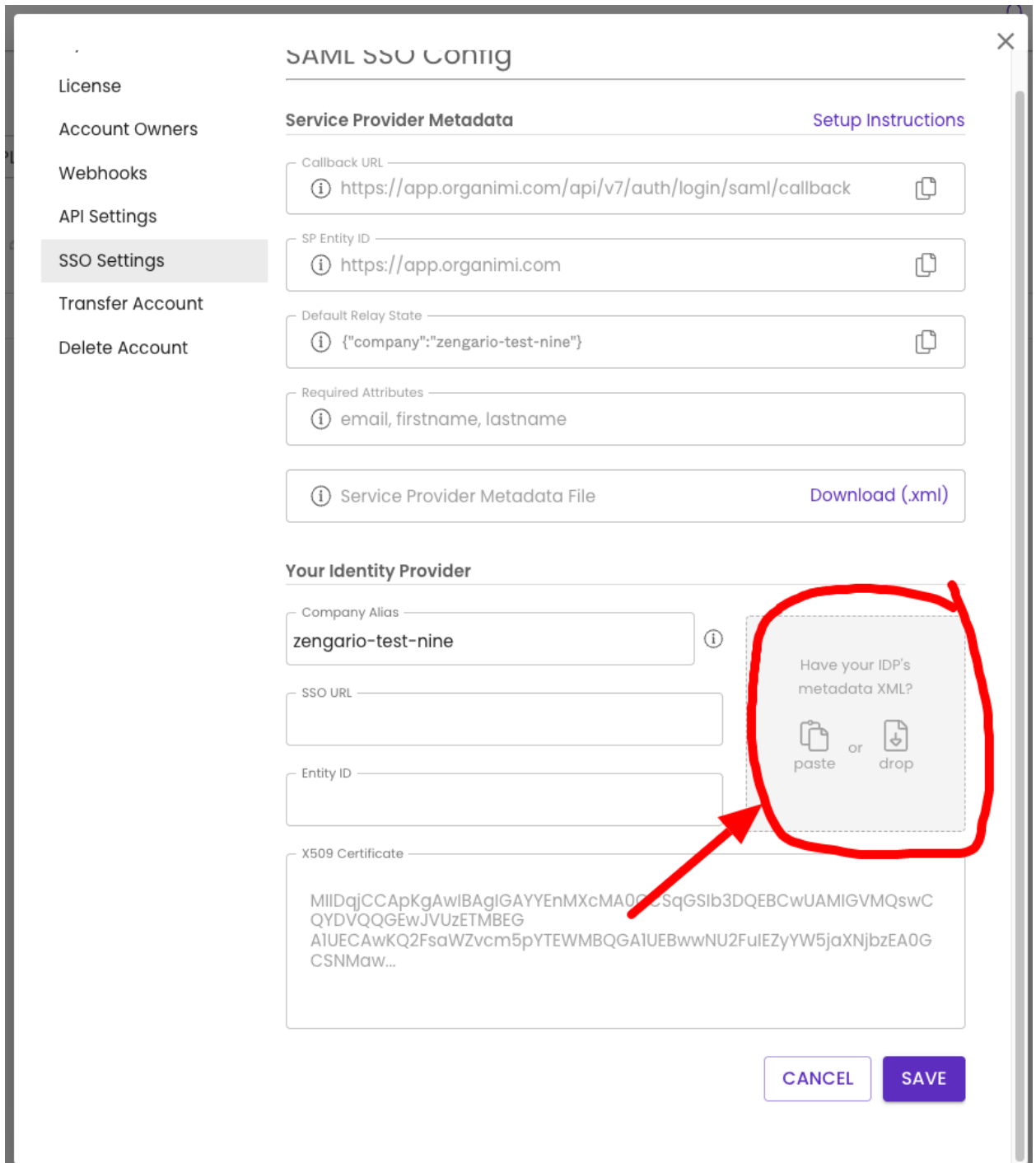
Add your IDP to enable SSO for this account

[Configure IDP](#)

## Step 7

Click on the “Configure IDP” button and enter:

1. **Company Alias:** Enter your company name. It should match exactly with the name entered for step 4.3
2. IDP Metadata: Paste in the XML copied from step 5 in to the “drop area” as highlighted below (click in the gray box and then paste)



The screenshot displays the 'SAML SSO CONFIG' interface. On the left is a navigation menu with options: License, Account Owners, Webhooks, API Settings, SSO Settings (highlighted), Transfer Account, and Delete Account. The main content area is titled 'Service Provider Metadata' and includes fields for Callback URL, SP Entity ID, Default Relay State, and Required Attributes. Below this is a 'Download (.xml)' button. The 'Your Identity Provider' section contains fields for Company Alias (filled with 'zengario-test-nine'), SSO URL, and Entity ID. A red circle highlights a gray drop area with the text 'Have your IDP's metadata XML?' and 'paste or drop' options. A red arrow points from the XML text in the X509 Certificate field to the drop area. At the bottom right are 'CANCEL' and 'SAVE' buttons.

**SAML SSO CONFIG**

License

Account Owners

Webhooks

API Settings

**SSO Settings**

Transfer Account

Delete Account

**Service Provider Metadata** [Setup Instructions](#)

Callback URL

SP Entity ID

Default Relay State

Required Attributes

Service Provider Metadata File [Download \(.xml\)](#)

**Your Identity Provider**

Company Alias

SSO URL

Entity ID

X509 Certificate

Have your IDP's metadata XML?

paste or drop

[CANCEL](#) [SAVE](#)

3. Click the SAVE button

My Info

License

Account Owners

Webhooks

API Settings

**SSO Settings**

Transfer Account

Delete Account

## SAML SSO Config

[Setup Instructions](#)

### Service Provider Metadata

Callback URL  
https://app.organimi.com/api/v7/auth/login/saml/callback

SP Entity ID  
https://app.organimi.com

Default Relay State  
{"company":"zengario-test-nine"}

Required Attributes  
email, firstname, lastname

Service Provider Metadata File [Download \(.xml\)](#)

### Your Identity Provider

Company Alias  
zengario-test-nine

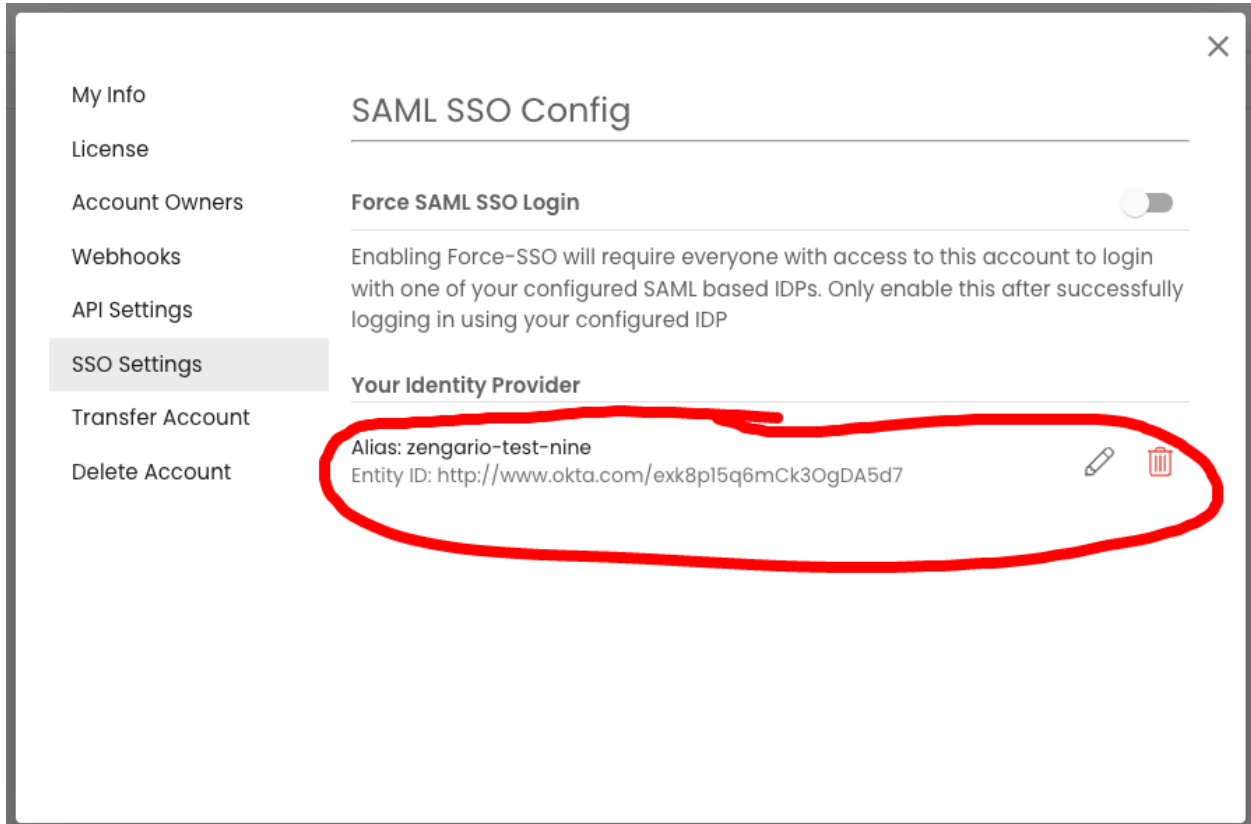
SSO URL  
https://dev-55539452.okta.com/app/dev-55539

Entity ID  
http://www.okta.com/exk8p15q6mCk3OgDA5d7

X509 Certificate  
MIIDqDCCApCgAwIBAgIGAYbcTh0zMA0GCSqGSib3DQEBCwUAMIGUMQs  
wCQYDVQQGEwJVUzETMBEG  
A1UECAwKQ2FsaWZvcmlkZXIwFTATBgNVBAMMDGRldi01NTUzOTQIMjEjEc  
MB0GCSaGSib3DOEJ

Great! we pre-filled the form for you. Please recheck if everything looks good, then submit

[CANCEL](#) [SAVE](#)



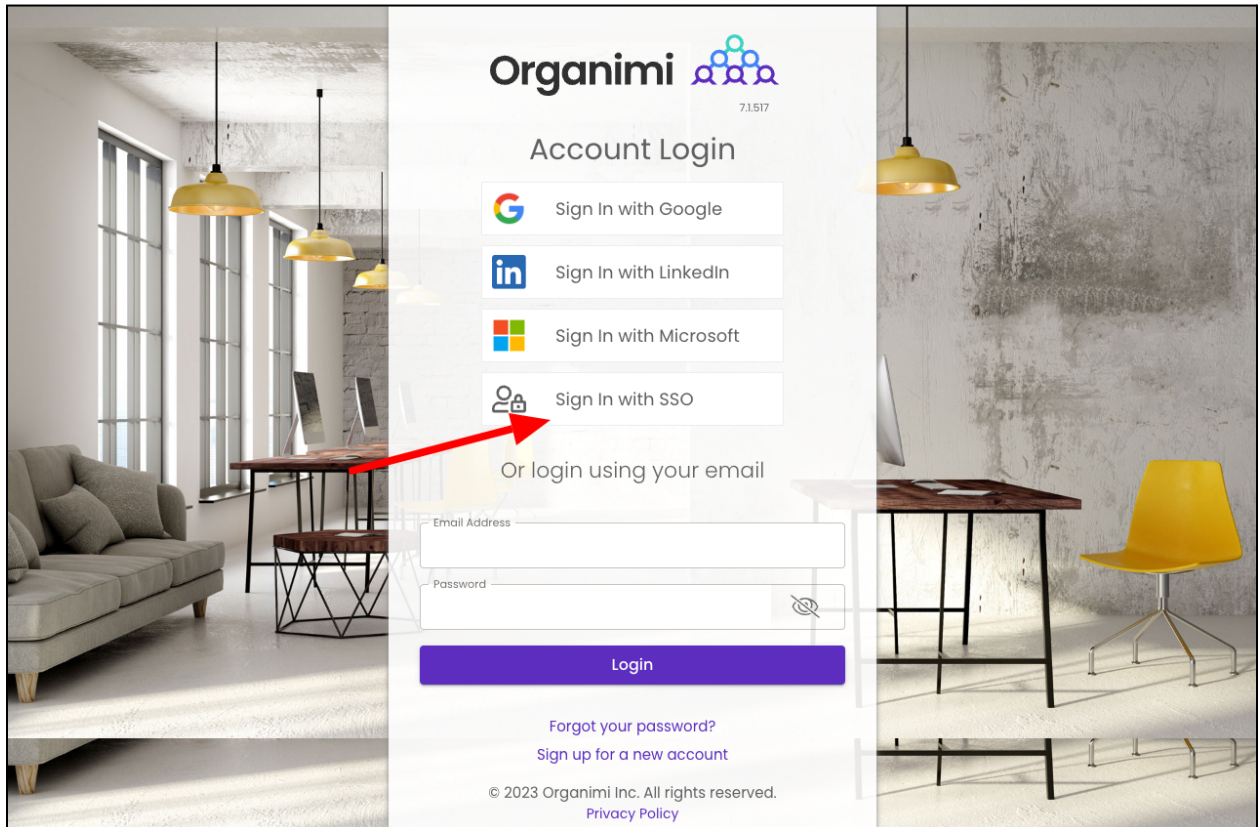
## Step 8

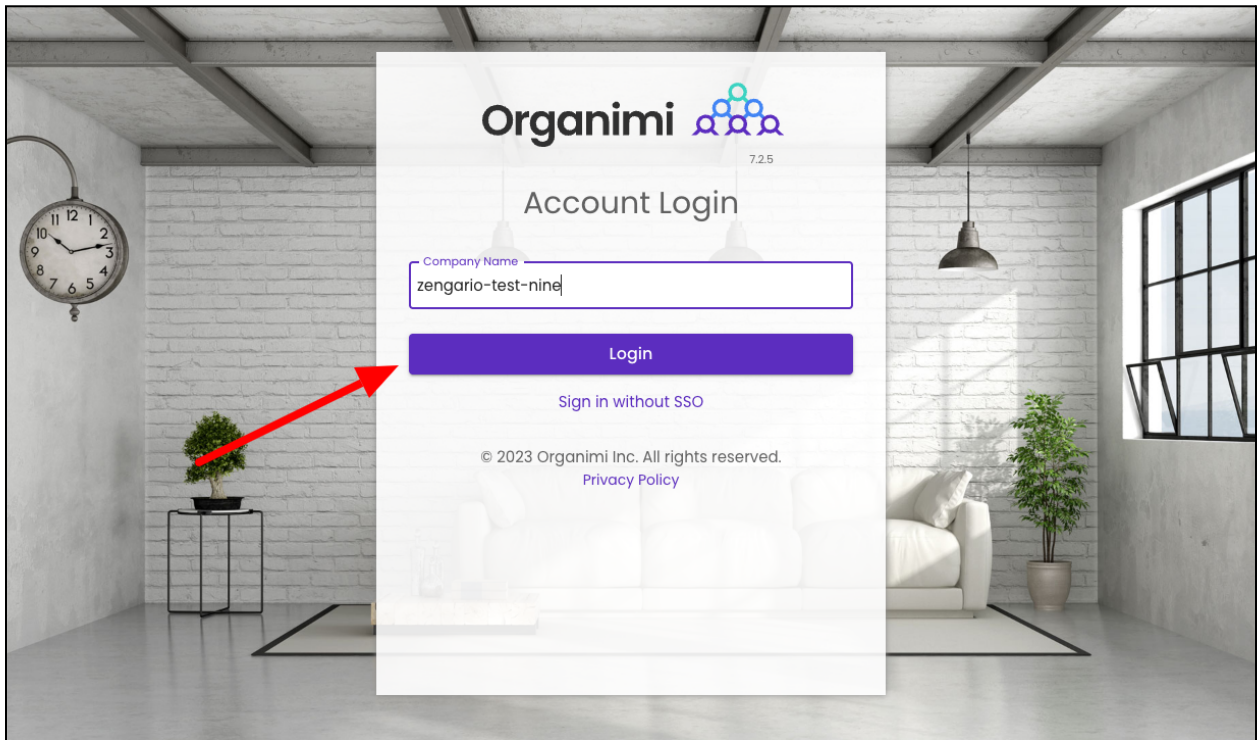
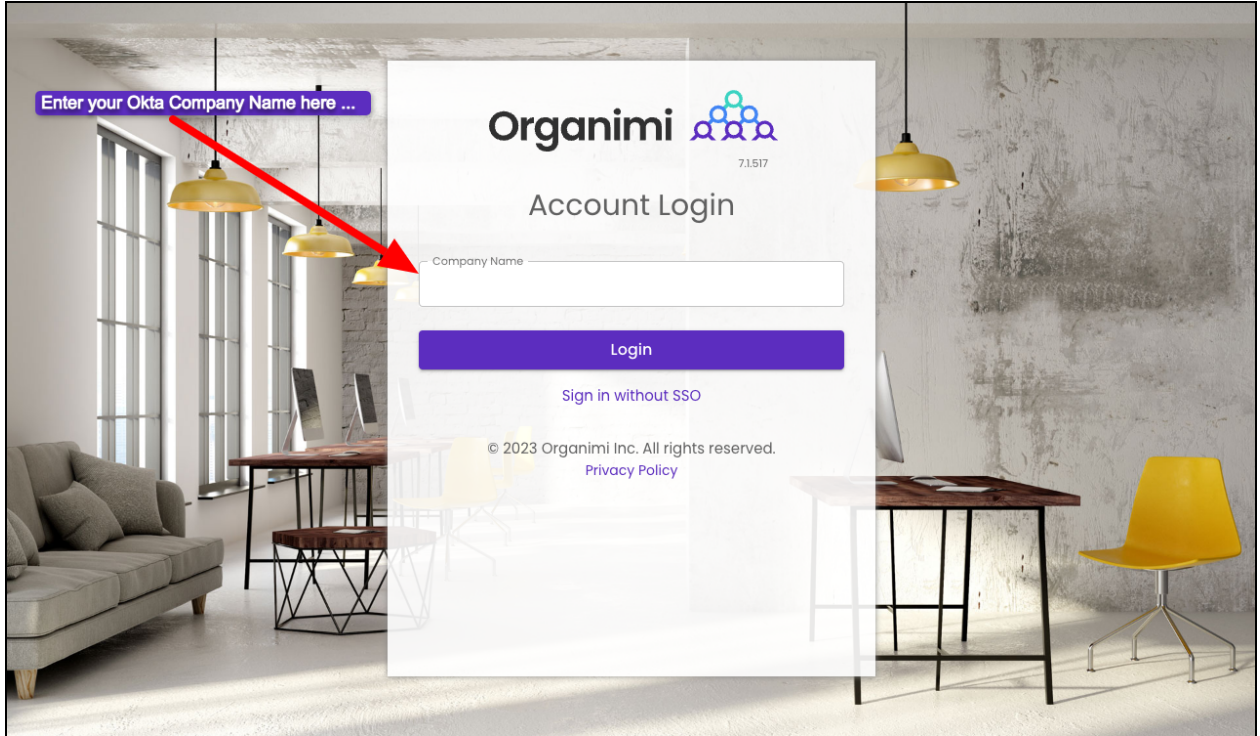
Your Identity Provider should show the Okta Entity ID that you just set up, which means IDP configuration is accepted.

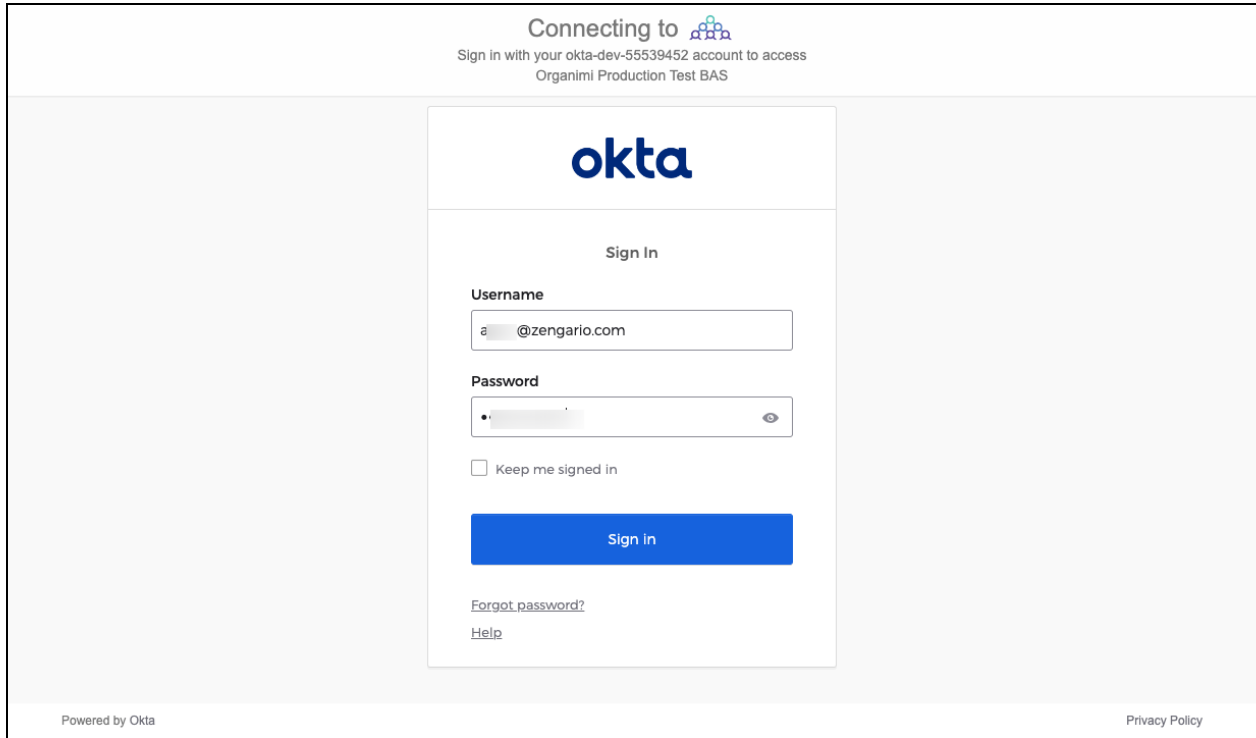
*Note: If you do not reach to this point and see an error message on clicking the "SAVE" button, Contact Organimi support @ [support@organimi.com](mailto:support@organimi.com)*

Now it's time to test logging in with your configured IDP. First logout from your account. Then login by clicking "Sign in with SSO". In the next screen, type in the company name matching from step 4.3 & 7.1 and then click login.

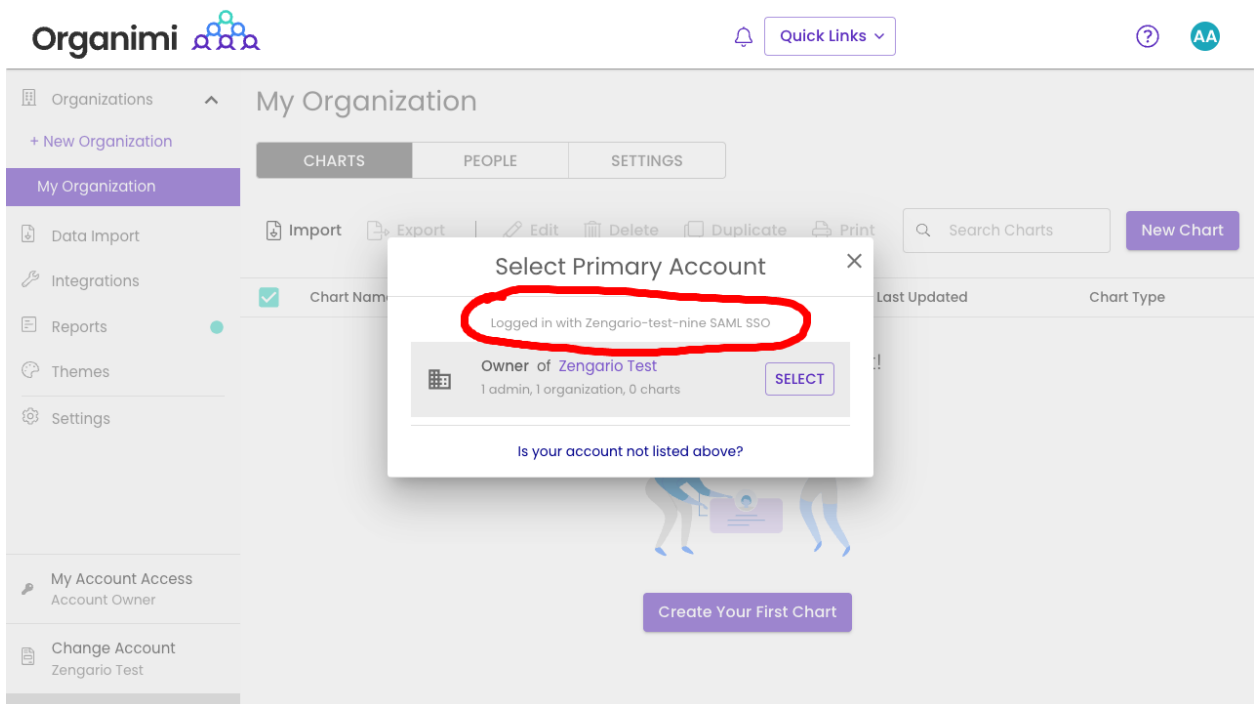
You should be redirected to your OKTA IDP where you can get authenticated. Once successful, you will be redirected back to Organimi and will be logged in.







And you are in. If you click the Change Account link on the Organimi screen you will see that you are logged in with SAML SSO

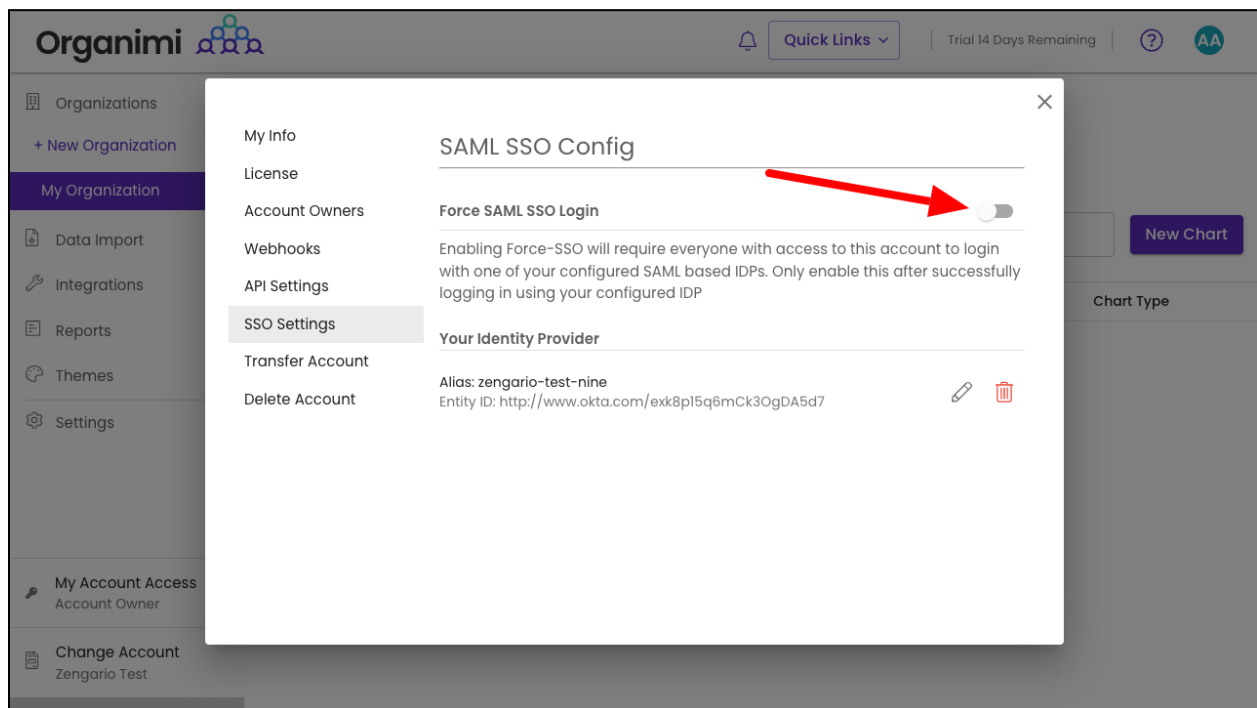




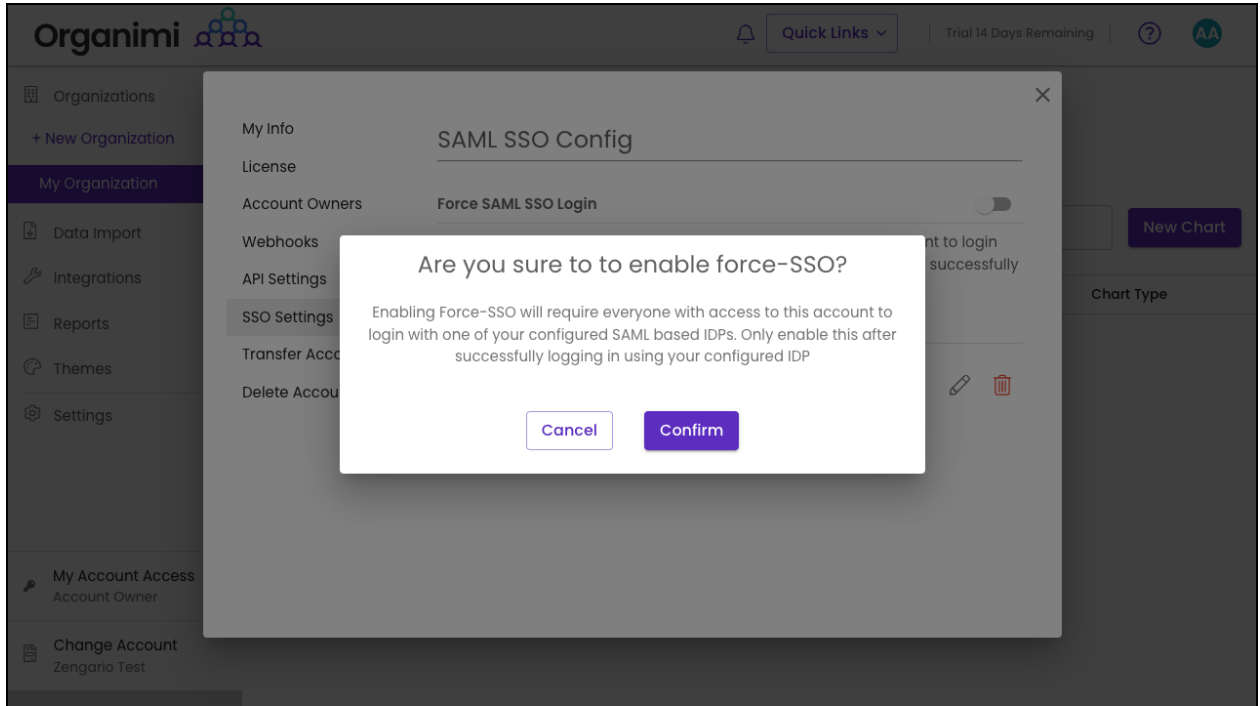
## Step 9

You can also enable “Force-SSO” from the configuration tab. Which will require everyone using this account (including you), to login using your configured IDP only, in order to access resources under this account. Other login methods (social & username/password) will not be allowed access to the account.

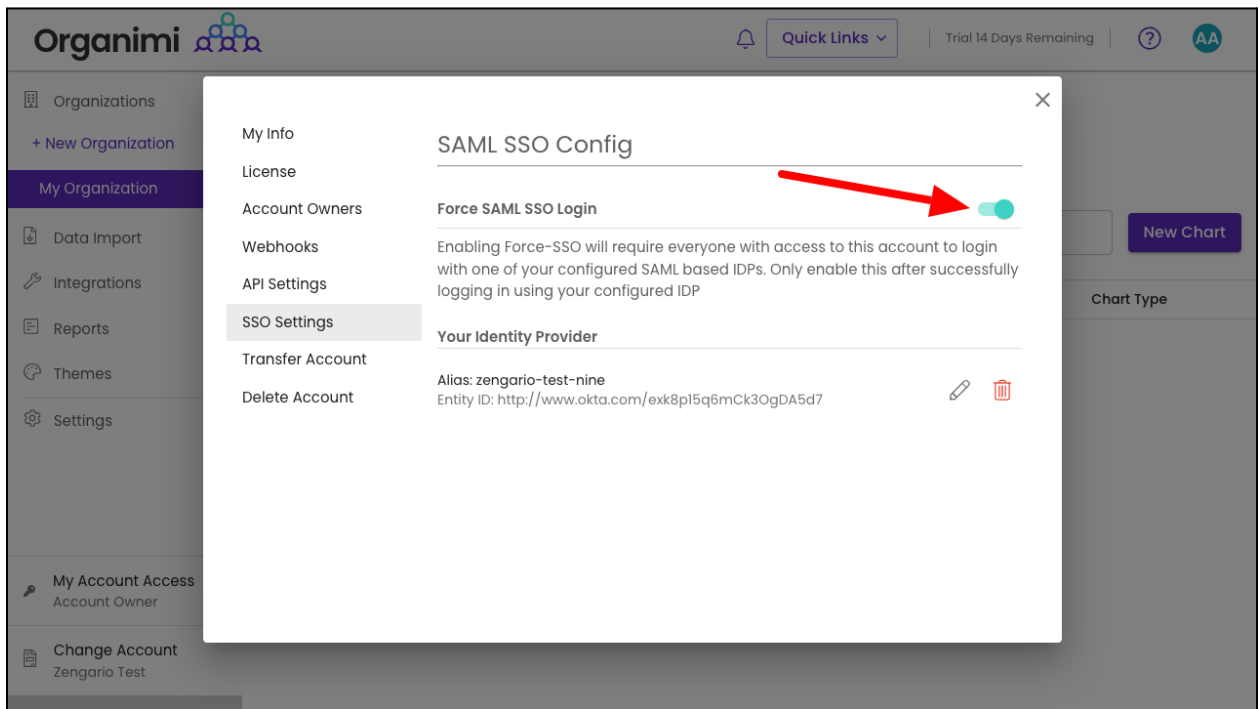
*Note: As the account owner, It's recommended that you test logging in with your IDP first before turning on this setting, as you will not be able to access the account via any other login methods after you enable the “Force-SSO” option.*



The screenshot shows the Organimi user interface. On the left is a navigation sidebar with options like Organizations, Data Import, Integrations, Reports, Themes, Settings, My Account Access, and Change Account. The main content area displays the 'SAML SSO Config' settings. A red arrow points to the 'Force SAML SSO Login' toggle switch, which is currently in the 'off' position. Below this, there is a warning message: 'Enabling Force-SSO will require everyone with access to this account to login with one of your configured SAML based IDPs. Only enable this after successfully logging in using your configured IDP'. The 'Your Identity Provider' section shows the alias 'zengario-test-nine' and the entity ID 'http://www.okta.com/exk8pl5q6mCk3OgDA5d7'.

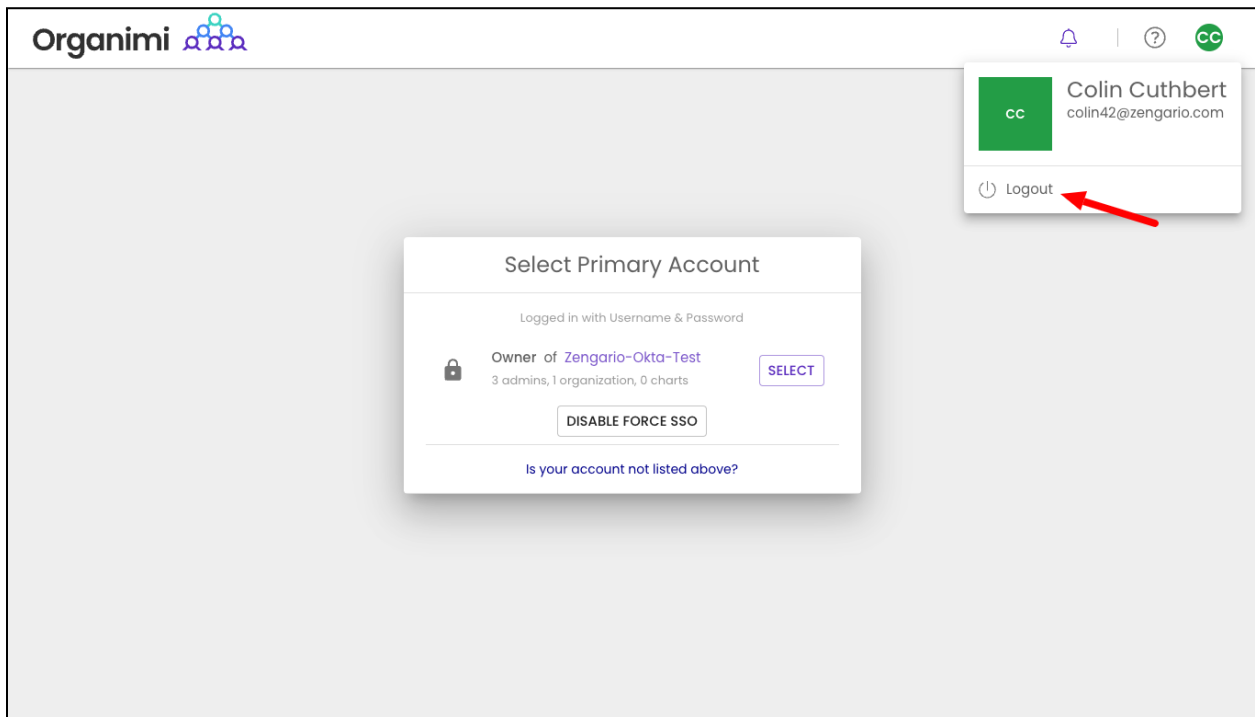
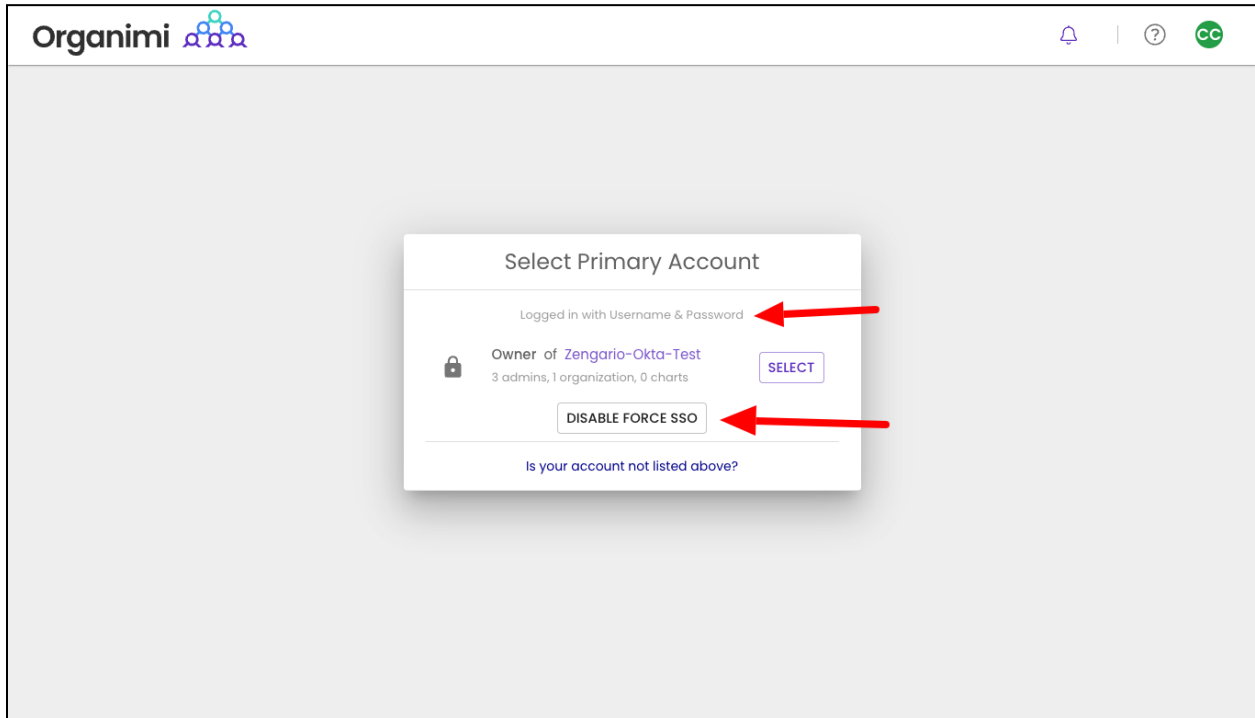


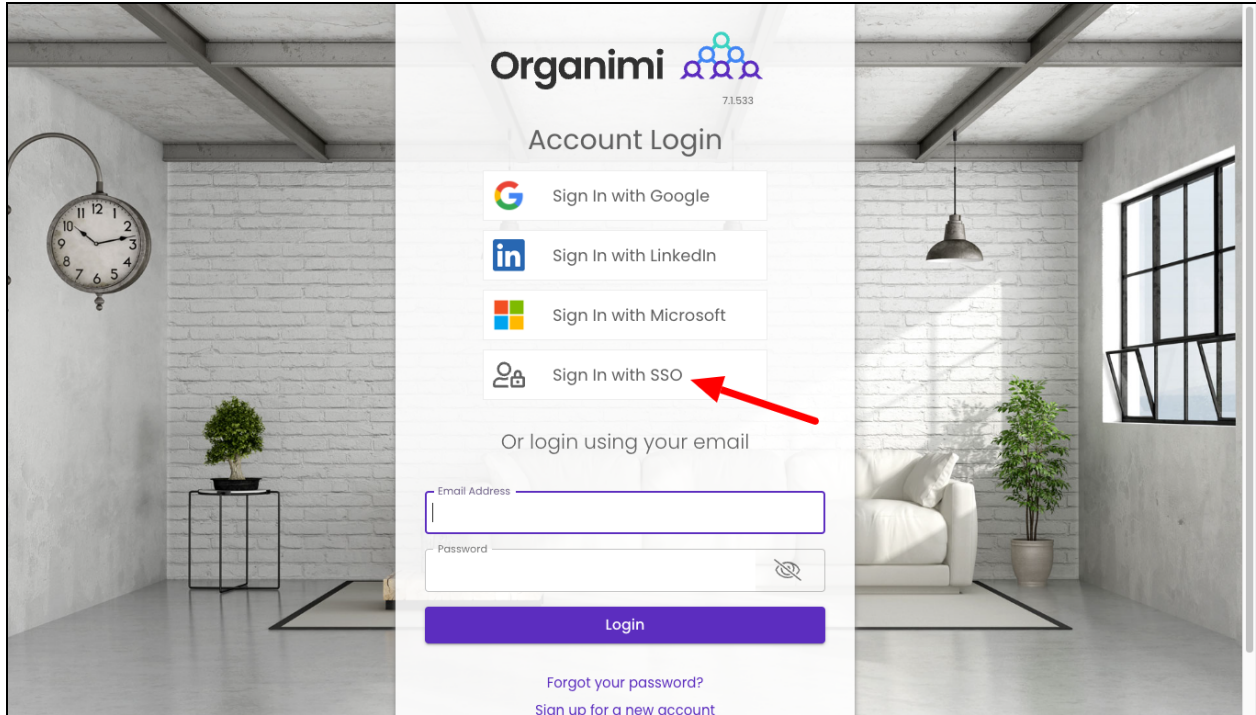
If you were logged into Organimi with you SSO IDP Account then you will just see that the switch is now on for “Force SSO”



If, however, you were logged in to Organimi with your social login or username/password your access to the account will be immediately disabled and you will be taken to the Account

Selection Screen and you will see that your access to the account is locked. You could disable the “Force SSO” (only available to account owners) ... but normally you would just logout from Organimi and log back in from your SSO IDP Account.





### Default share settings for IDP's:

Alternatively users can be invited from the charts as editors or viewers by enabling default sharing settings for SSO IDP. This will not send any email invites to these users. They can login directly using the shared idp. These permissions can be changed, as needed.

SSO Login does not imply chart will remove the access

SSO login can view this chart will assign viewer permissions to the users logging in the SSO IDP

SSO login can edit this chart will enable Editor permissions to the users logging in with the SSO IDP

## Chart Sharing Options

### General Sharing

- SSO IDP
- Coming Soon

#### SSO IDP

Restrict SSO users to have default access to this chart. Viewer and Editor access supported; when SSO enabled.

### Private Sharing

- Bulk Invites
- Private Access

### Link Sharing

- Public Link
- Password Protected Link

### Website Embed

- Iframe Code
- Whitelisted Domains

#### SSO Logged In User Access

- SSO login does NOT imply chart access
- SSO login can VIEW this chart by default
- SSO login can EDIT roles in this chart by default

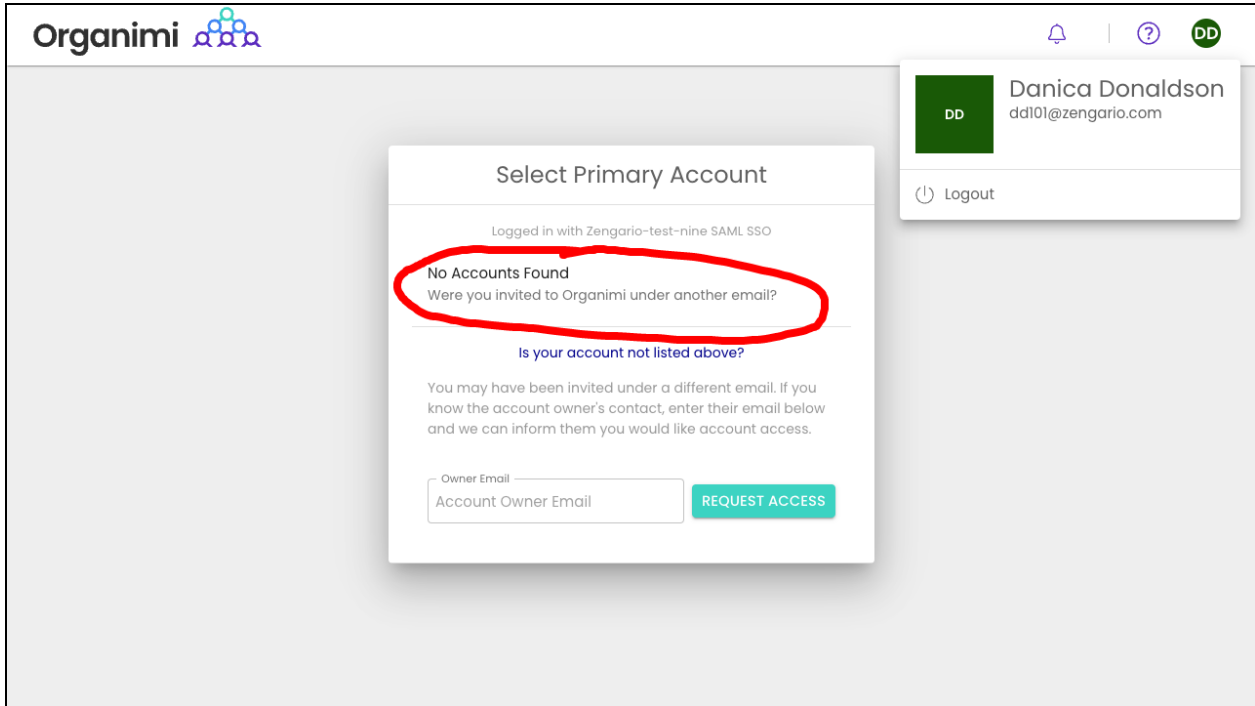
#### COMING SOON

New Generic options allowing people in your charts to be given access to the chart without having to manage their access individually.

Contact [support@organimi.com](mailto:support@organimi.com) for more details

## Please Note ...

In addition to provisioning the application to users in Okta you will also need to invite users to one or your Organizations or Charts or in Organimi ... if the user has not been invited and granted access to any Organizations or Charts in Organimi they will be greeted with a message telling them they do not have access to any accounts in Organimi ... if this happens then simply invite them to the Organization as an Admin or to one of the Charts as an Editor or Viewer.



Thank you for being an Organimi customer and please contact us at [support@organimi.com](mailto:support@organimi.com) if you run into any issues or have any questions that are not covered in this document or are beyond the scope of this document.