Okta Identity Management Requirements for People First and Chatbot

Configuration Instructions

Version: 1.1

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Classification: Company Confidential

people first

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1 Summary

This document provides information on how to:

- Create a People First Okta application
- Create an Okta authorisation server

Whilst progressing through this document some key information will need to be retained and sent to us in order for us to configure your people first system to work with your Okta identity manager.

------ KEY INFORMATON REQUIRED BY MHR ----------

Key information required by MHR in order to configure your People First to work with your Okta identity manager :-

Your Okta People First Application Client ID : (Section 2.15) :

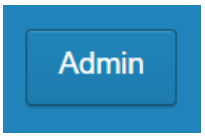
Your Okta Authorisation Server Metadata URI : (Section 3.8) :

Please forward the above information to MHR.

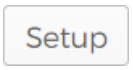
2 Creating a People First Okta application

1) Sign into your Okta identity manager

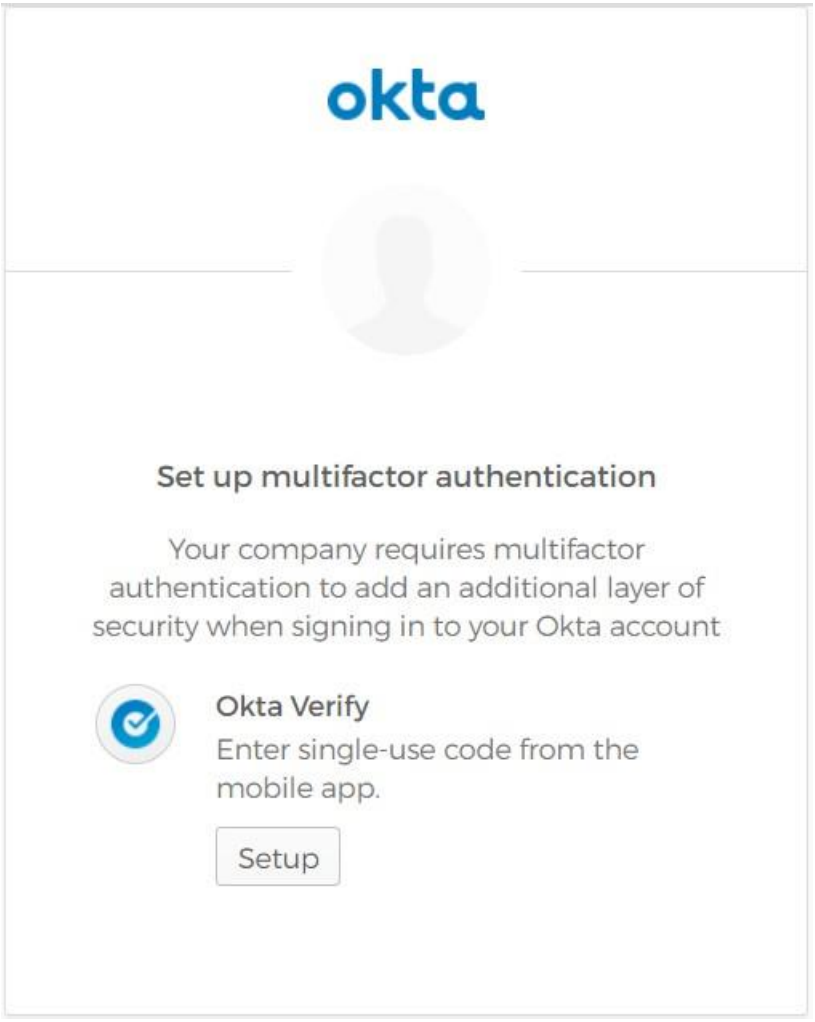
2) Select *Your apps* from your user profile dropdown menu

3) Click on the 

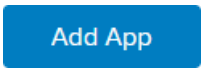
button at the top of the screen

4) **NB**: You may be asked to set up MFA, if so, click the 

button and follow the instructions

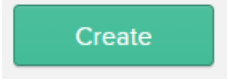


5) To continue configuring the Okta app

Click on the 

button to select *Use single sign on* and then click on the 

button

6) In the Platform dropdown select “Single Page App (SPA)” and click on the 

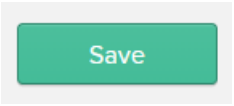
button

7) Enter “People First” for the Application name

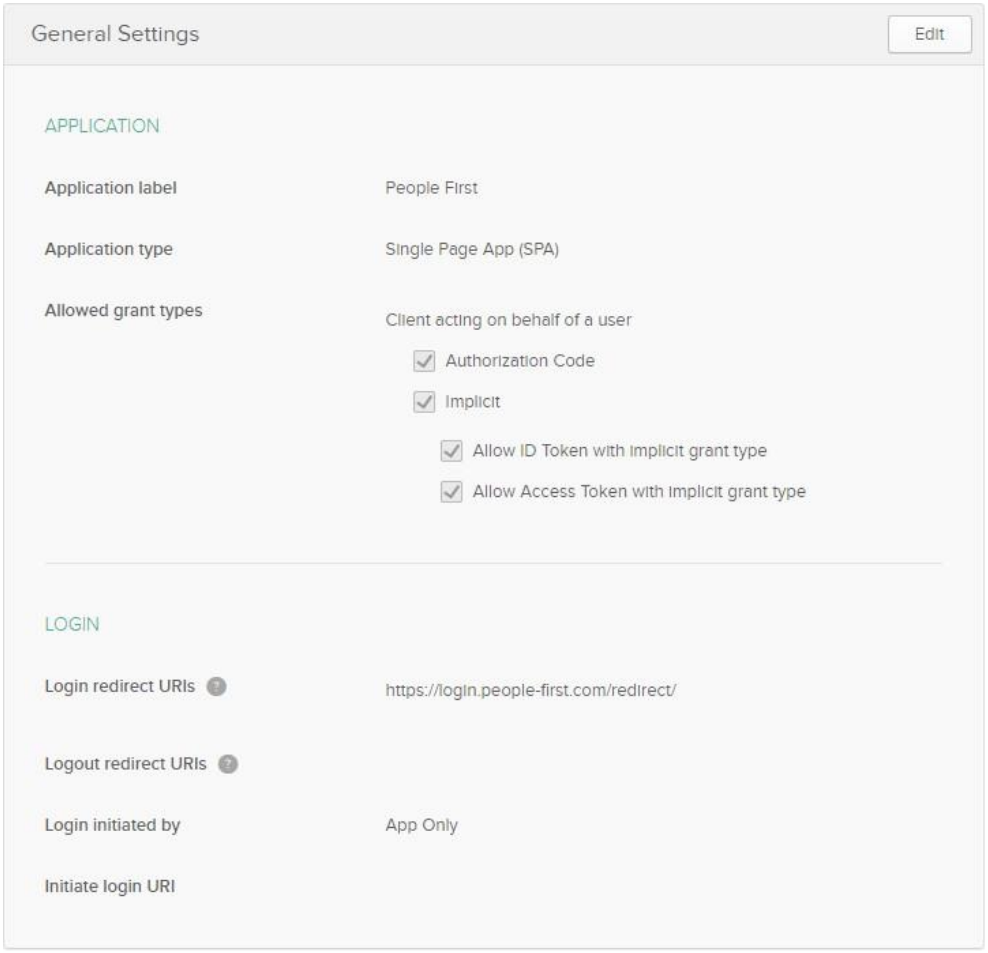
8) Enter “https://login.people-first.com/redirect/” for the Login redirect URIs

9) Ensure “Implicit” is checked in the *Allowed grant types*

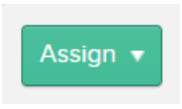
10) NB: Logout Redirect URLs – not required

11) Click on the 

button.



12) Click on the Assignments tab

13) Click the 

button and select the appropriate option to assign any people or groups of people, from your Okta directory, who require user access to People First

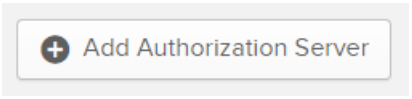
14) Save your changes and then click “Done”

15) Make a note of the Okta People First application **client id** generated.

3 Creating an Okta authorisation server

1) Go to the Okta Admin portal

2) Click on the Security tab and select the API option

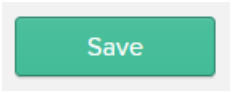
3) On the Authorization Servers tab, click the 

button or alternatively you can customise the “default” authorisation server

4) For the Name enter “PeopleFirstIdP”

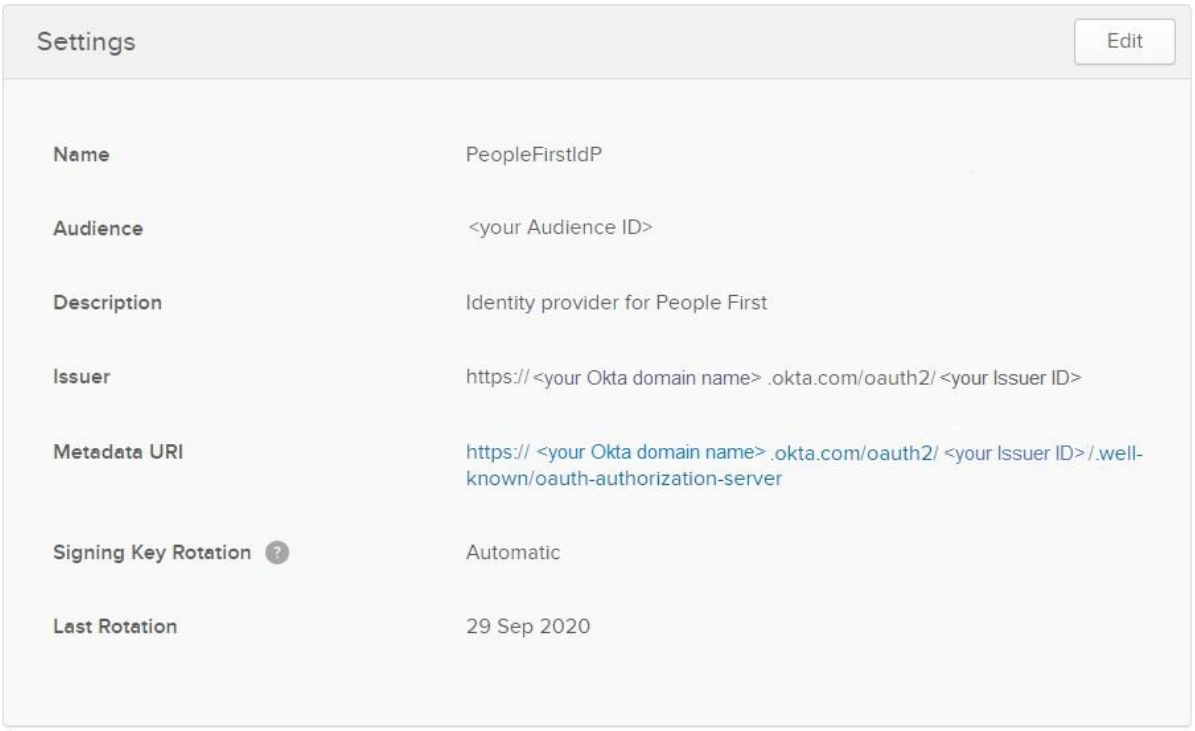
5) For the Audience – enter the Okta People First application **client id** generated previously

6) For the Description enter “Identity provider for People First”

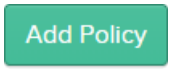
7) Click the 

button

8) Make a note of the **Metadata URI**



9) **NB**: You must add a policy for users to be able to logon (if you customised the default IdP this may be unnecessary as it has a policy out of the box)

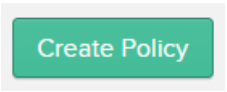
10) Go to the "Access Policies" tab and click on the 

button

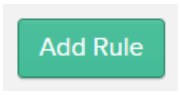
11) For the Name enter "Default Policy"

12) For the Description enter "People First Access Policy"

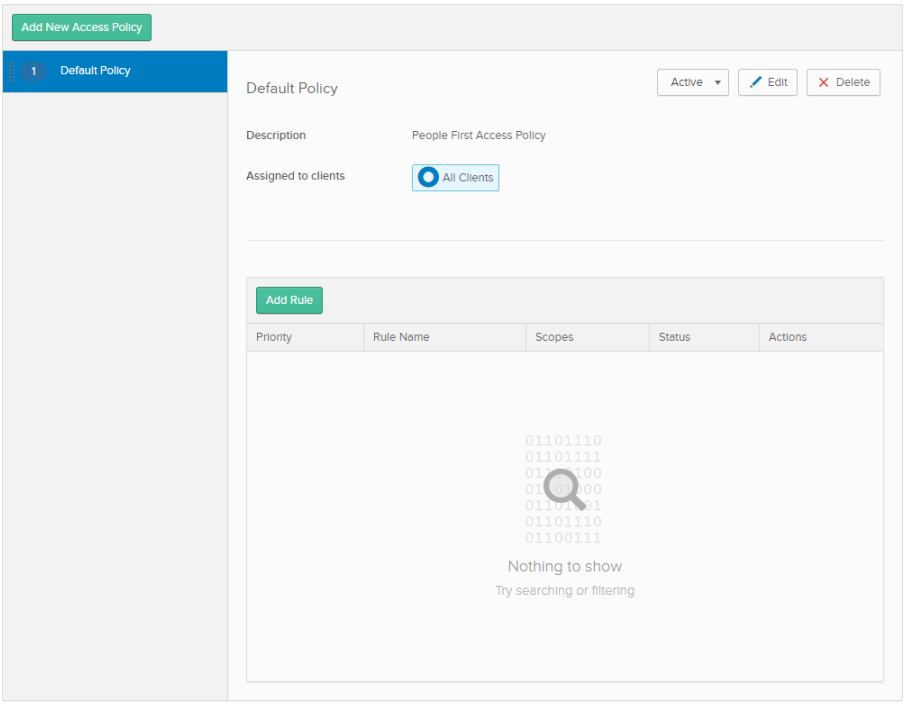
13) For Assign to, ensure All clients is selected

14) Click on the 

button

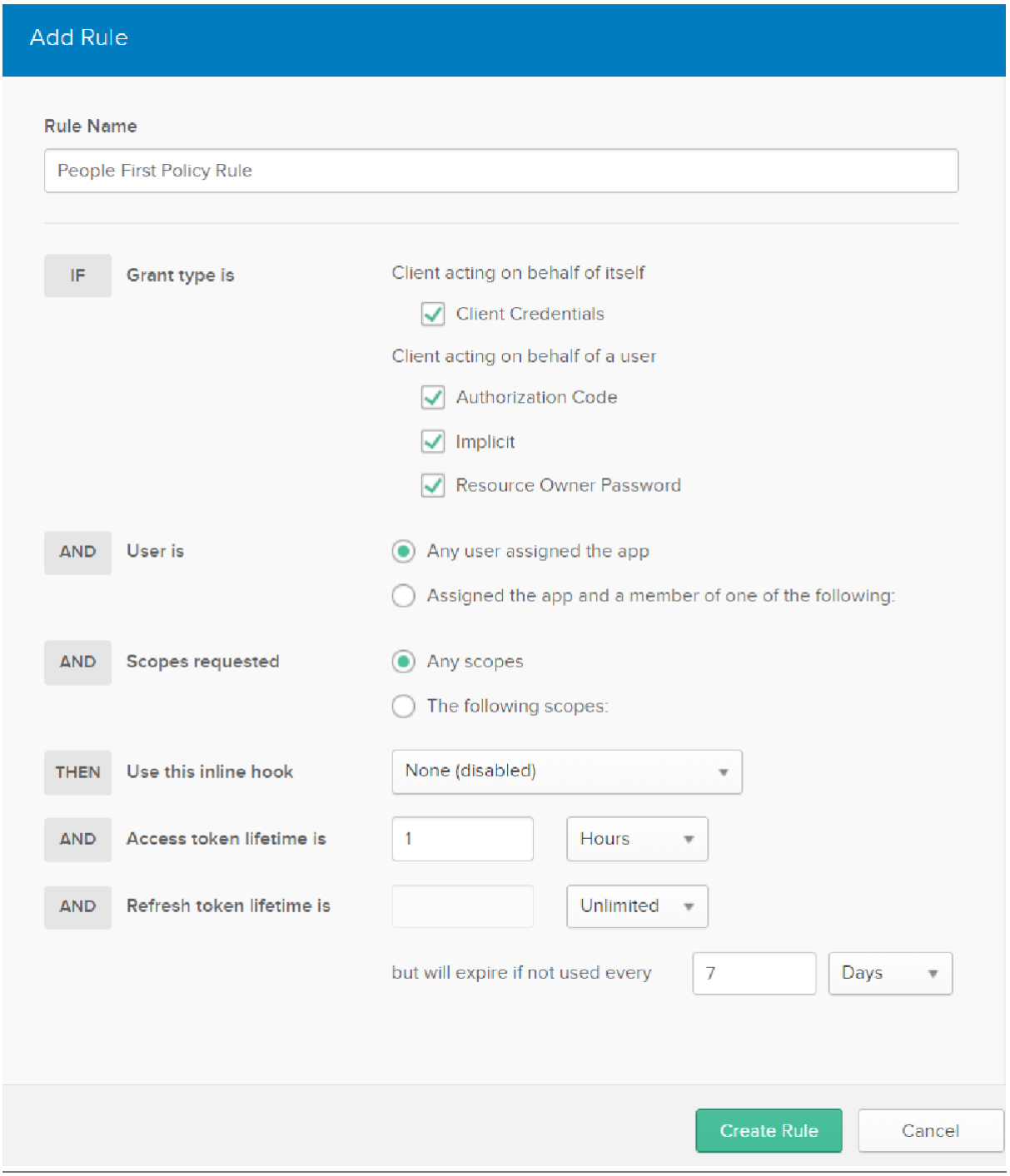
15) On the next screen, click on the 

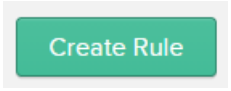
button



16) For the Rule Name enter “People First Policy Rule”

17) All other settings can be left as defaults

18) 

19) Click on the  button

Please raise a case with the MHR service desk, passing on the key information recorded in this document, so that your People First system can be configured with your identity provider

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