



OpenID-Connect via Okta

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Sevanta Dealflow now supports the ability for end-users to login using their Okta account. If enabled on our end, the Sevanta Dealflow login page will display a button to "Sign in with Okta" that will take the user to okta.com for authentication, and then return the user to Sevanta Dealflow without any additional login steps.



We are able to configure this integration as optional or required. If optional, the user can still set a password in Sevanta Dealflow and has a choice to either login using that password or login using Okta. If required, the user will be unable to set a password in Sevanta Dealflow, and Okta will be the only means to login. In most situations, it makes sense to **require** login via Okta to simplify the end-user experience, avoid the risk of weak/reused/breached passwords, and maintain better administrative control over user access.

A user account must be created in Sevanta Dealflow as well as in Okta; at this time there is no automatic provisioning/creation of user accounts. Sevanta Dealflow only requests verification of the email address from Okta in order to look up the user in our directory to ensure that the user is authorized to access the system. No other user information from Okta is required.

Note that verification only occurs at the start of a new session; Sevanta Dealflow does not re-check with Okta during the session. By default, a session lasts for 30 days, but depending on your security posture, you may wish to ask us to shorten that duration so that the user needs to re-authenticate via Okta more frequently. Due to the way users engage with our application, we do not recommend session lifetimes shorter than 16 hours.

If you disable a user in Okta, they will thereafter be unable to login to Sevanta Dealflow, but any existing sessions will not be ended immediately. In order to immediately disable access by the user, you must also deactivate the user account within Sevanta Dealflow.

Sevanta Dealflow does support its own 2-factor authentication (2FA), but by default when a user logs in via Okta, our own 2FA is disabled, with the presumption that your users have to use 2FA with Okta. We don't recommend requiring users to have to use 2FA in both places.

Okta Configuration Guide

Prerequisites

Your firm must have an active subscription with Sevanta.

Supported Features

Service Provider (SP) initiated SSO

Procedure:

- 1) Go to <https://www.okta.com/integrations/sevantaDealflow/> and choose Add.
- 2) Go to the Sign On tab and copy the Client ID and Client Secret; send them to dts-support@sevanta.com so we can configure your dealflow system to ask Okta to authenticate your users. If you don't wish to send them by email, you can submit via the Contact Us form on the Help tab in your Sevanta account.
- 3) Go to Assignments (in Okta) and add your users or group so that Okta will allow those users to be authenticated to this application.