

OrgChart Now Okta SWA Setup Guide

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OrgChart Now – Okta SWA Setup Guide

Introduction

Okta is an integrated identity management and mobility management service that securely and simply connects people to their applications. OrgChart Now can be added to your Okta dashboard using Secure Web Authentication (SWA).

The intended audience for this document is your Okta administrator.

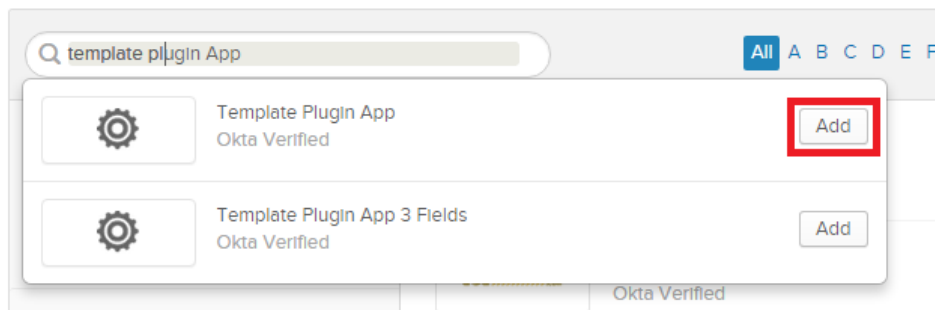
Note 1: The Okta SWA (Secure Web Authentication) Browser Plug-in is required. Okta will automatically prompt to install in your browser if the plug-in is not already installed.

Note 2: In the future, you will also be able add OrgChart Now to your Okta dashboard using SAML (instead of SWA).

Setup Instructions

1. Login into your Okta Account
2. Click on the Admin button
3. Select the 'Add Application' shortcut
4. Search for 'Template Plugin App' and Click Add

 Add Application



5. Fill out the General Settings panel as follows.

Note: For the URL, you may need to replace 'na1.orgchartnow.com' with the URL to your OrgChart Now Server. Make sure to check the URL (in the address bar in your web browser) when you log into OrgChart Now.

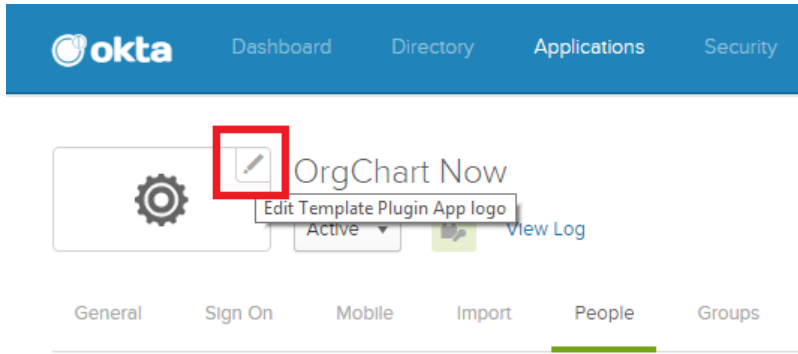
General Settings - Required

Application label	<input type="text" value="OrgChart Now"/>
	<small>This label displays under the app on your home page</small>
URL	<input type="text" value="https://na1.orgchartnow.com/start.html"/>
	<small>The URL of the login page for this app</small>
Username field	<input type="text" value="Input#username"/>
	<small>CSS selector for the username field in the login form</small>
Password field	<input type="text" value="Input#password"/>
	<small>CSS selector for the password field in the login form</small>
Login Button	<input type="text" value="button#loginbutton"/>
	<small>CSS selector for the login button in the login form</small>
Application Visibility	<input type="checkbox"/> Do not display application icon to users
	<input type="checkbox"/> Do not display application icon in the Okta Mobile App
Browser plugin auto-submit	<input checked="" type="checkbox"/> Automatically log in when user lands on login page

6. Click Next
7. Assign the application to Okta Users as appropriate

Setting the Logo

1. Download the logo from https://www.orgchartpro.com/wp-content/uploads/ocnokta_logo.png
2. In the Okta Admin panel select the Applications tab and then select the Applications menu item
3. Click on the OrgChart Now Application
4. Click on the pencil icon



5. Browse to the logo you downloaded and open it
6. Click on the Upload Logo button

Optional: Managing User Names

Optionally, you may want to change all OrgChart Now user names to match Okta User names.

Email orgchartnow@officeworksoftware.com to change the primary OrgChart Now administrators' user name.

For all other user accounts:

1. Log into OrgChart Now
2. Select the gear icon (in the upper right) and select 'Manage Users'
3. Select a user (using the checkbox)
4. Select Update
5. Change the user id to match the Okta user id (usually an email address)
6. Click Update
7. Repeat for all users

