Okta Epic EMP Implementation Guide

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Chapter 1

Overview

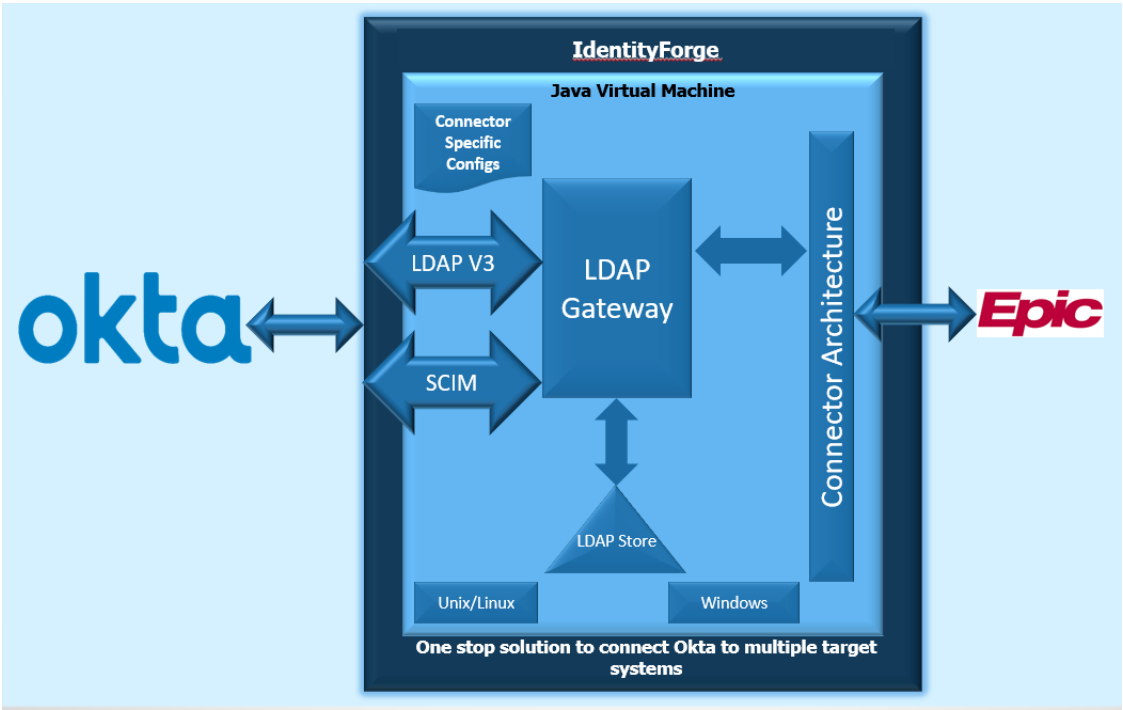
Topics:

- Overview - Architecture and Details

This implementation guide provides information about integrating Okta with Epic Electronic Medical Record (EMR) target system via SCIM (System for Cross-domain Identity Management) 2.0 APIs using Identityforge solution.

Overview - Architecture and Details

The overall architecture of the integration is depicted in the following diagram



The Integration involves the following solutions -

- **Okta** - Identity Cloud can be integrated with any SCIM 2.0 and LDAP solution.
- **Identityforge Solution** - Provides a SCIM 2.0 server to integrate with Okta. SCIM 2.0 server is an on-prem component which has to be installed in a customer's network, but the SCIM end point can be publicly accessible with the URL: **https://scimserver.customerdomain.com/scim/v2**

  Note: Okta's SCIM 2.0 on-prem agent is not required for this solution.

- **Epic** - Epic Electronic Medical Record (EMR) whose lifecycle management of EMP records has to be managed through Okta. Epic EMR would be available setup customer's network.

  This document covers the configurations which are required to be performed on Okta.

  Note: Documentation about Identityforge solution will be provided as part of delivery of the Identityforge software which the customer has to procure from Identityforge (IDMWORKS). Setup & configuration of Identityforge solution is not in the scope of this document.

  Note: Epic EMR setup and configurations are customer's responsibility and is not in the scope of this document.

Chapter 2

Features

Topics:

- Supported Features

Supported Features

The following provisioning features are currently supported:

- **Push New Users** - New users created in Okta will also create an Epic EMP user.
- **Push Profile Updates** - Updates made to Okta user's profile will be updated to Epic EMP user.
- **Push User Deactivation** - Deactivating the user or disabling the user's access to the application through Okta will inactivate the Epic EMP user.
- **Reactivate Users** - Reactivating the user in Okta and assigning the application again will activate the Epic EMP user.
- **Import Users** - Epic EMP users can be imported into Okta and either matched against existing Okta users or created as new Okta users.

Note: Integration supports single and multiple Epic Templates, Sub-Templates, Link EMP and SER records, etc.

Note: Epic does not support Groups. So Import Groups and Push Groups are not in-scope.

Note: Following SCIM 2.0 attributes: *phoneNumbers, photos, addresses, groups, x509Certificates, isuserregistered, sendinvite, forcepasswordchangeatnextlogin, administrativedisable, pwdhistorylist and inviteexpiration* are not supported by Epic target system.

Chapter 3

Requirements

Topics:

- Requirements

Requirements

As outlined in overview, the requirements for the overall integration is setup and configuration of Identityforge solution and Epic EMP Integration Interface.

Identityforge solution has the following components which needs to be setup and configured in customer's network:

- SCIM 2.0 Server.
- LDAP Gateway.

Identityforge Solution documentation has details to setup and configure SCIM 2.0 server and LDAP gateway which would be provided when the customer purchases the software by contacting here: https://www.idmworks.com/identity-forge/

Epic Electronic Medical Records (EMR) system and its EMP integration interface setup and configuration is responsibility of customer and Epic. Identityforge solution documentation has details about Epic EMP integration interface.

Chapter 4

Step-by-Step Configuration Instructions

Topics:

- Step-by-Step Configuration Instructions

Step-by-Step Configuration Instructions

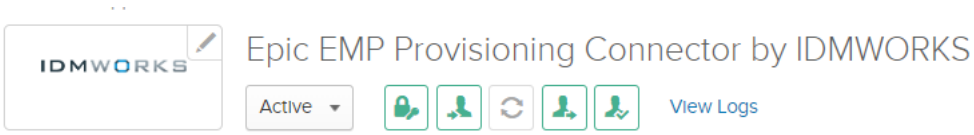
To get started, SCIM URL and an API token has to be generated from Identityforge SCIM 2.0 Server and specified in step 2 of **Okta Configuration Steps** in ***SCIM Connector base URL*** field and ***Authorization Bearer*** field as outlined below.

Documentation about SCIM URL and how to generate the API token from Identityforge SCIM 2.0 Server would be provided to the customer when the customer purchases the Identityforge solution.

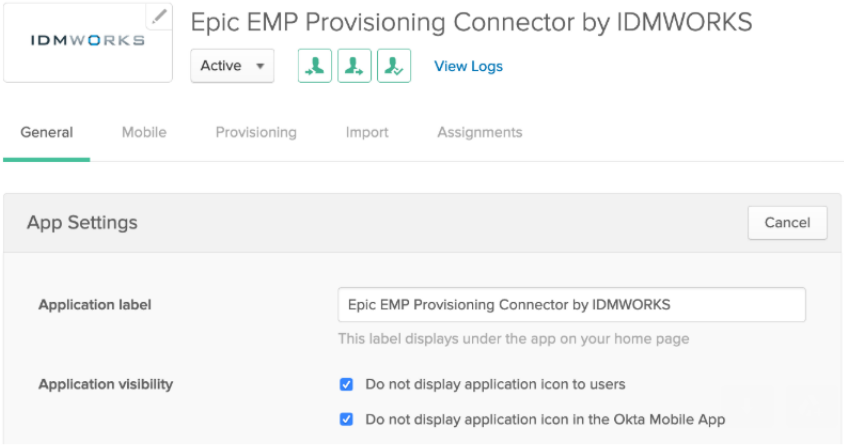
Okta Configuration Steps

From Okta *Add Application* menu search for ***Epic EMP Provisioning Connector by IDMWORKS*** and add the application.

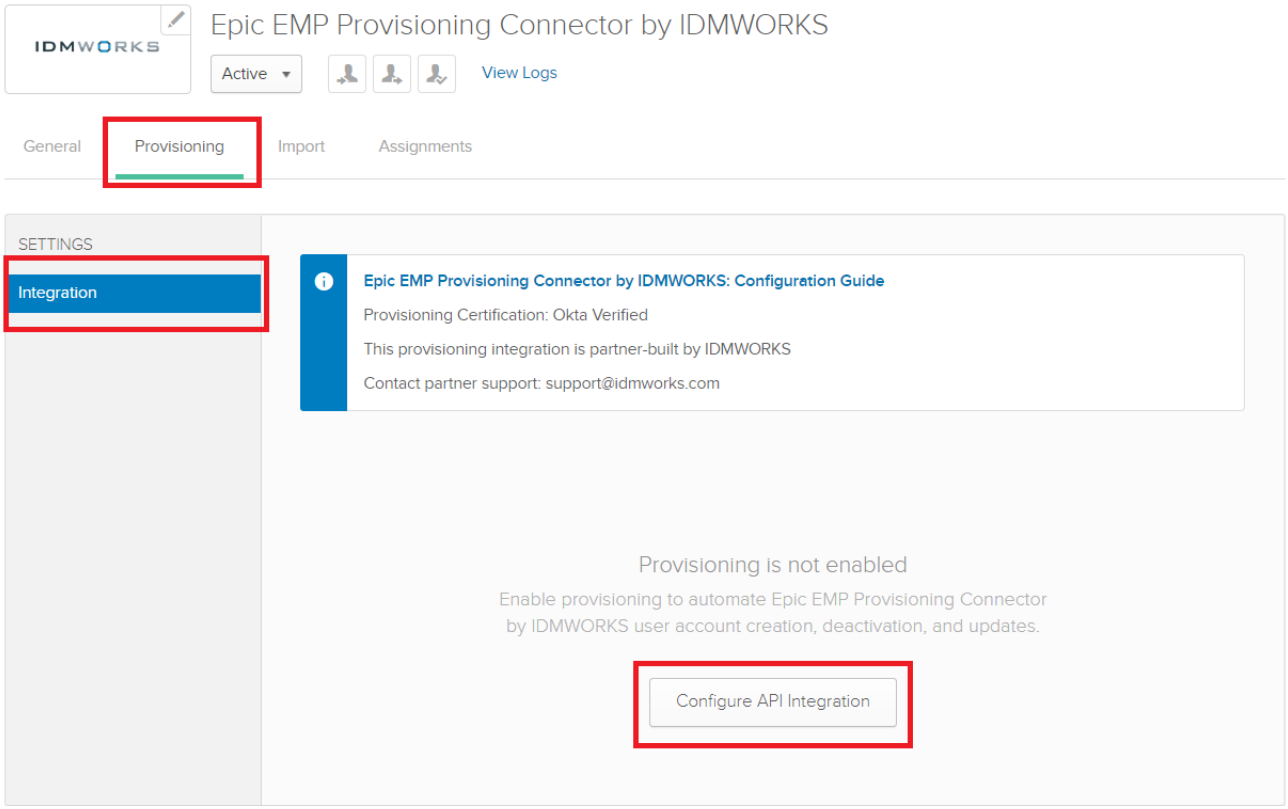
1. Add SCIM enabled application ***Epic EMP Provisioning Connector by IDMWORKS***



2. In Okta, open General application tab and check the following boxes:
   - Do not display application icon to users.
   - Do not display application icon in the Okta Mobile App.

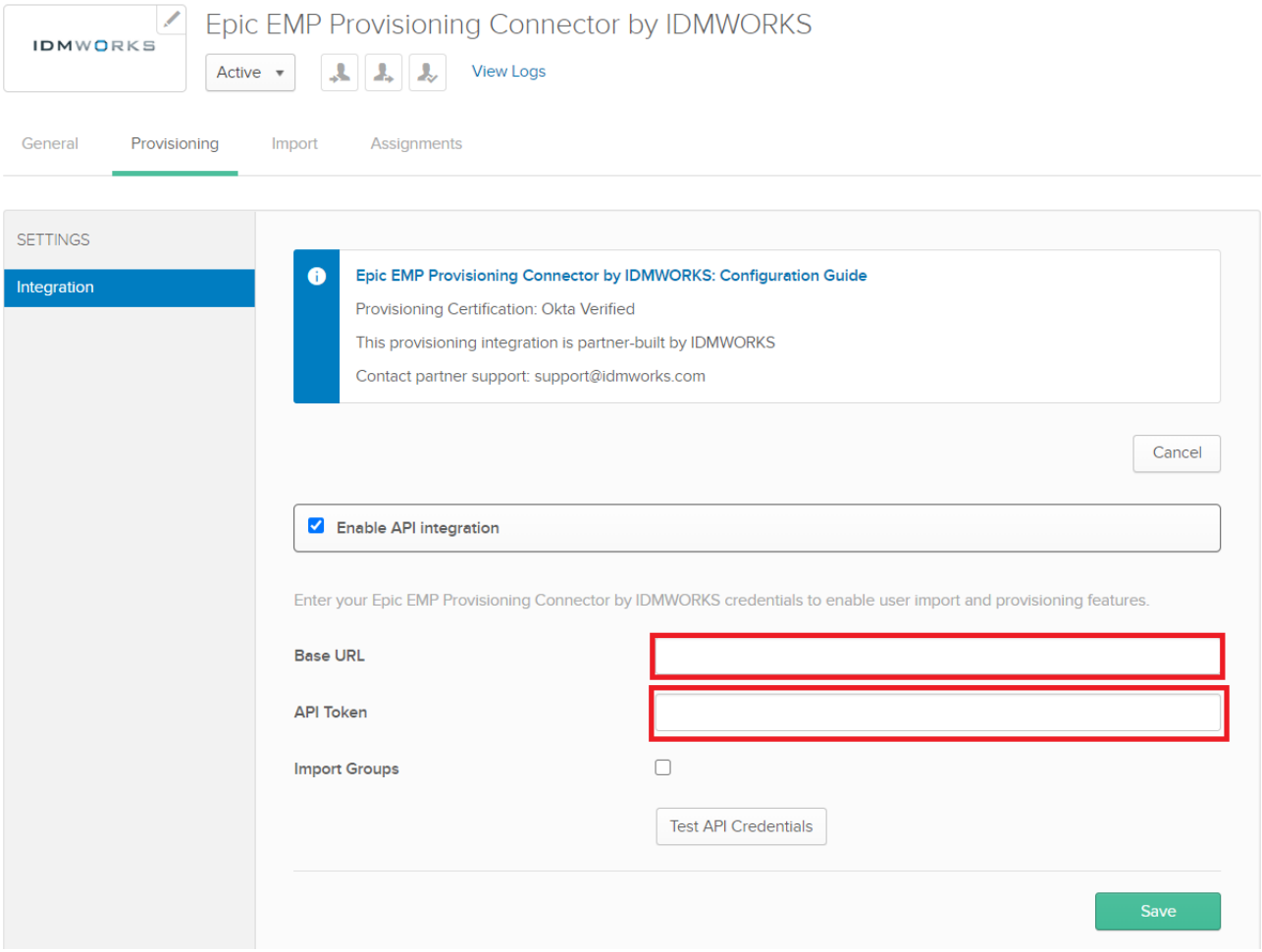


3. Enable API integration by navigating to **Provisioning → Integration** and click on **Configure API Integration**

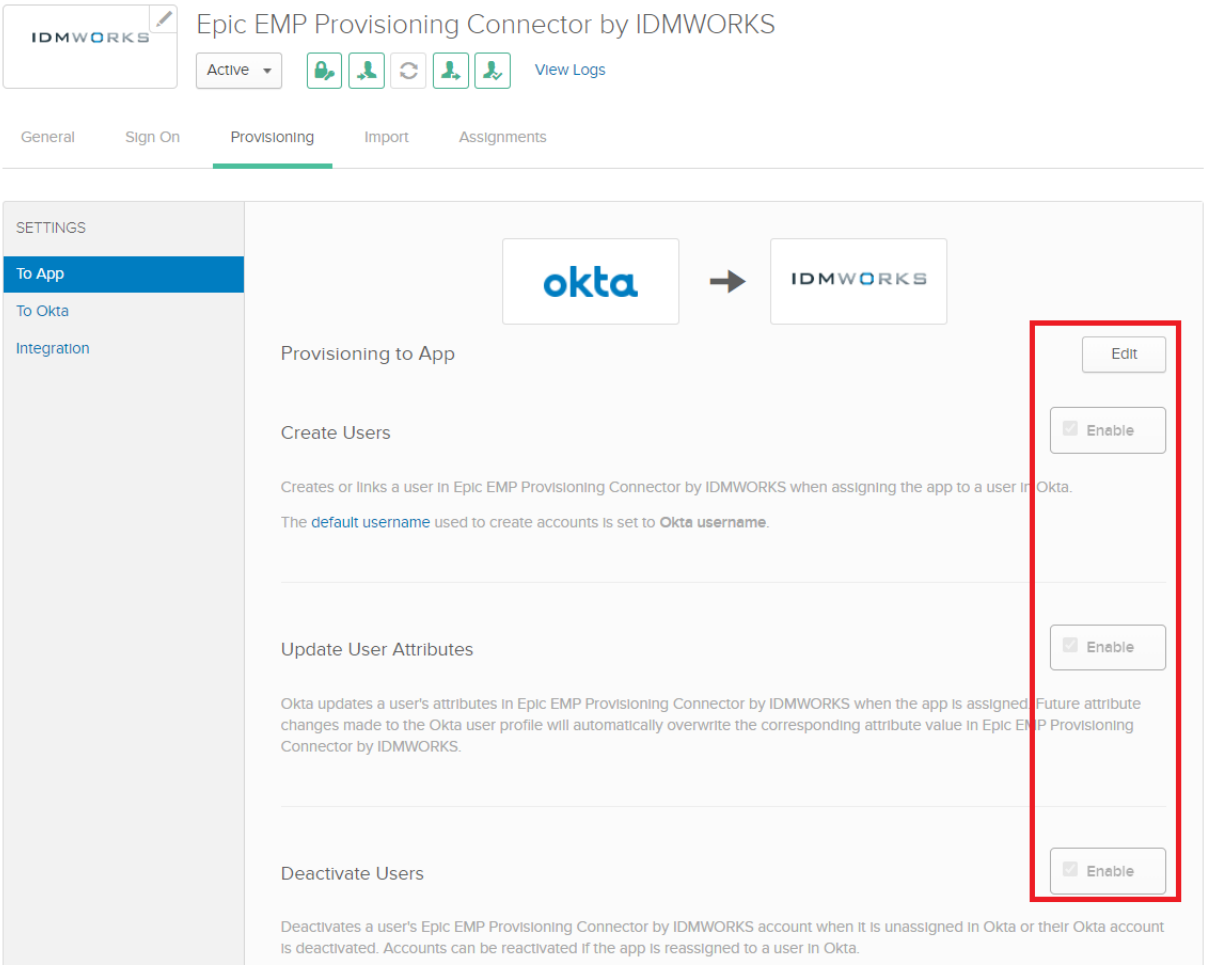


4. Configure Integration by entering SCIM URL, API Token and clicking on **Save**. SCIM URL & API Token are determined by following the documentation of setting up Identityforge SCIM 2.0 Server.

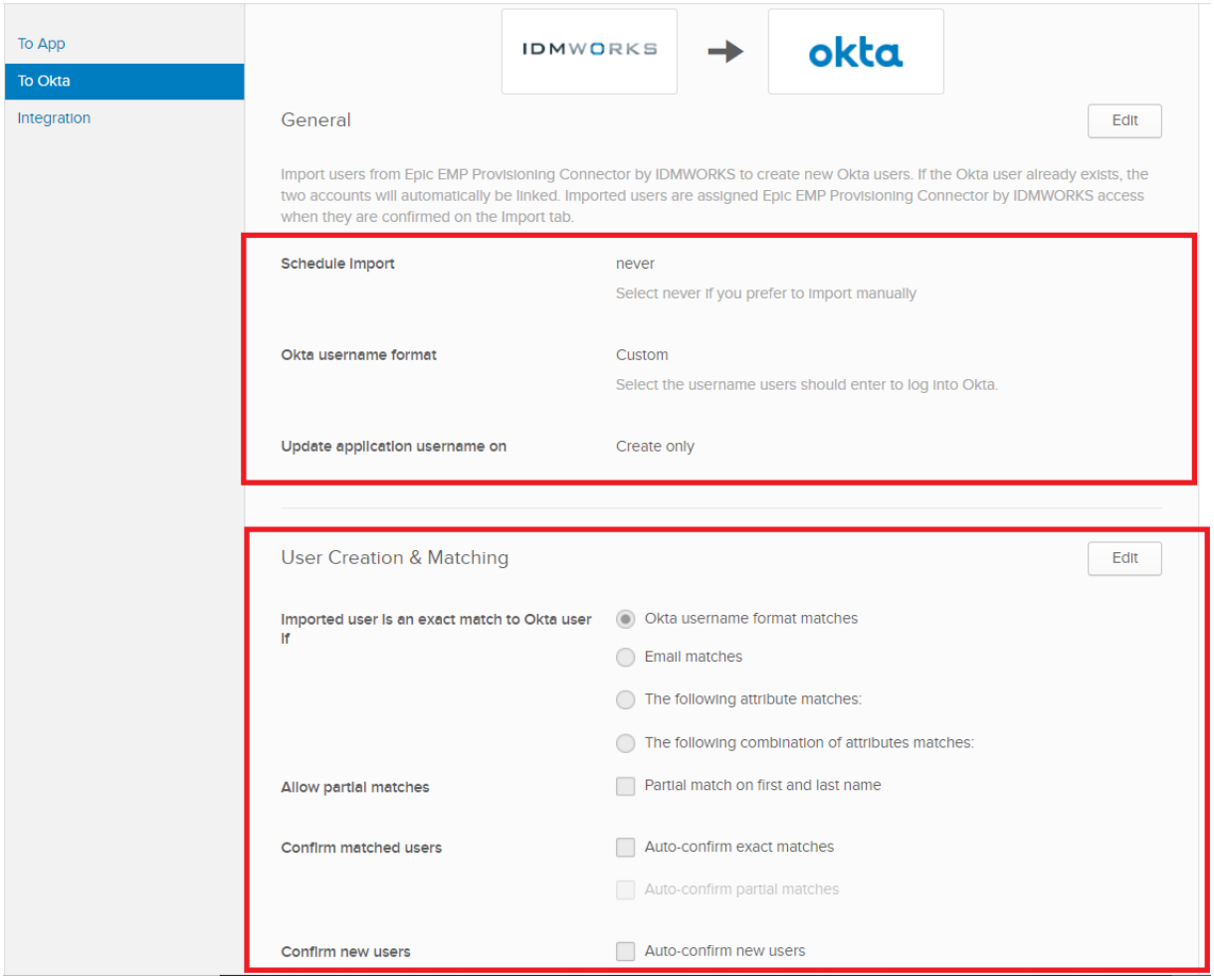
   Note: Example SCIM Base URL: **https://scimserver.customerdomain.com/scim/v2**



5. Select **To App** in the left panel, then select the Provisioning Features you want to enable.



6. Select **To Okta** in the left panel if you want to configure Salesforce as Profile & Lifecycle Mastering or change Import rule settings:


To App
To Okta
Integration
IDMWORKS
okta
General
Edit
Import users from Epic EMP Provisioning Connector by IDMWORKS to create new Okta users. If the Okta user already exists, the two accounts will automatically be linked. Imported users are assigned Epic EMP Provisioning Connector by IDMWORKS access when they are confirmed on the Import tab.
Schedule Import
never
Select never if you prefer to import manually
Okta username format
Custom
Select the username users should enter to log into Okta.
Update application username on
Create only
User Creation & Matching
Edit
Imported user is an exact match to Okta user if
Okta username format matches
Email matches
The following attribute matches:
The following combination of attributes matches:
Allow partial matches
Partial match on first and last name
Confirm matched users
Auto-confirm exact matches
Auto-confirm partial matches
Confirm new users
Auto-confirm new users

7. Click **Save**.

Chapter 5

Troubleshooting

If you have questions or difficulties with the integration, please contact IDMWORKS support via **support@idmworks.com**