Freshservice – Okta SSO Configuration Documentation

This template is used to document configuration details of your Okta SSO integration with Freshservice. Maintaining this record aligns with ITIL practices in Access Management and Service Transition.

# 1. Overview

Provide a summary of the SSO implementation purpose, including timeline and project scope.

# 2. Stakeholders

List names and roles of involved personnel (e.g., Freshservice admin, Okta admin, project manager).

# 3. Prerequisites

Document prerequisites such as Freshservice admin rights, Okta admin access, and SAML feature availability.

# 4. Okta Configuration

Include:  
- SSO URL  
- Certificate fingerprint  
- Entity ID  
- Assertion Consumer Service (ACS) URL

# 5. Attribute Mapping

List attribute mappings defined in Okta (e.g., email → email, firstName → given\_name).

# 6. Group/User Assignments

Document how users or groups are assigned to the Freshservice app in Okta.

# 7. Freshservice Settings

Document SAML settings configured under Admin > Security in Freshservice.

# 8. Testing Results

Summarize outcomes from SSO testing, including success criteria and fallback plans.

# 9. Go-Live Date

Specify the date and time SSO was enabled for production users.

# 10. Change Control Record

Include change request IDs or CAB approvals related to the implementation.

# 11. Post-Go-Live Observations

List known issues, lessons learned, or user feedback from the rollout.

# 12. Maintenance Contacts

Provide contact information for the person who will maintain SSO configurations moving forward.