

PERFORMANCE & TALENT

Instructions for Moving to Single Sign On (SSO)

Guidance document for setting up SSO with Performance & Talent

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10/04/24



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1. Introduction

Performance & Talent supports Single Sign On (SSO) using SAML 2.0. Currently we support Microsoft Azure Active Directory, Okta, OneLogin, Oracle Identity Cloud and Google Cloud Identity as identity providers. If you wish your organisation's users to access Performance & Talent via SSO instead of email address and password, this article will provide instructions on how to move your organisation from your existing Performance & Talent log- in procedure to SSO access.

Please note: When considering SSO, please ensure to ask your IT department about whether this will work on your mobile devices as this is often a key consideration when deciding whether SSO is the right choice.

It's also important to be aware that under an SSO setup, new users will not receive an automated invitation email from Performance & Talent when they are added to the system. Therefore, you will need to provide new employees with instructions about accessing Performance & Talent as part of your employee induction/onboarding materials.

2. Testing and Set Up

1. Check with your IT department that you can use either Microsoft Azure Active Directory, Okta, OneLogin, Oracle Identity Cloud or Google Cloud Identity for SSO. You may wish to pass on the instructions below for their reference.

2. Contact us and request your own subdomain.

Currently, you access Performance & Talent via <https://app.clearreview.com>. However, when you move to SSO, your users will access Performance & Talent using a different link which will be in the form <https://YourChosenSubdomain.clearreview.com>. We recommend that you use your company name as your subdomain unless it is long in which case you could use an abbreviated version.

3. We will then set up a Performance & Talent test instance for configuring and testing your SSO. To do this, you need to provide us with the email address of the initial user you will use for testing your SSO. This user's email must:

(a) Exist in your Active Directory / Okta / OneLogin system.

(b) Not already exist in your existing Performance & Talent system (as duplicate email addresses are not allowed across the Performance & Talent platform). If it is not possible to create a brand new test user for this purposes and you need to use an existing Performance & Talent user, one option is to temporarily change the email address of that user in your existing Performance & Talent system to another email address (e.g. a personal or alias email), so their actual email address can then be added to the test SSO system.

4. Setup Performance & Talent as a SSO application in your chosen identity provider's system as follows:

(a). Microsoft Azure: follow these instructions: <https://docs.microsoft.com/en-us/azure/active-directory/saas-apps/clearreview-tutorial>

(b). Okta: As an Administrator, click Add Application, search for Performance & Talent and then follow the instructions provided by Okta.

(c). OneLogin: See PDF instructions [here](#).

(d). Oracle / Google: Please contact us for further details.

5. Populate the Single Sign-on fields in Performance & Talent. To do this:

- Access your SSO test site as the test user using the URL and password provided to you in a private/incognito browser session. This will prevent any browser caching issues.

- Go to Admin > Integrations > Single Sign-On Settings > Change. Populate the four Single

Sign in fields in Performance & Talent with the necessary SSO data, as explained in the instructions in Step 4.

- Once you save this data, the SSO test system will immediately be converted to SSO so you will no longer be able to access it using the password you were provided with. Therefore, it is important that you input the correct SSO data first time, otherwise you will be locked out and you will need to raise a support request.

- Close down your browser.

6. If everything is successful, your test user should now be able to access Performance & Talent via SSO using the link <https://YourChosenSubdomain.clearreview.com>

7. If you wish, you may add more users to your SSO test system for further testing. But again, ensure that these users' email addresses do not exist in your main Performance & Talent site.

3. Go Live

1. Agree with us a time and date for the switch over from your current Performance & Talent site to SSO to happen. Please note: This should be outside of your normal office hours to ensure that users are not using Performance & Talent during the switch over.

2. Ensure that the entire organisation has been notified to no longer access Performance & Talent through <https://app.ClearReview.com> (<https://App.ClearReview.com>.) and to update any bookmarks or saved URLs to your new SSO link.

3. Update all existing links to Performance & Talent within your organisation to your new SSO URL. Don't forget the following: Links on desktops, mobile home screens, intranet, training/comms materials, induction materials, email templates, etc.

Remember that under an SSO setup, new users will not receive an automated invitation email from Performance & Talent when they are added to the system. Therefore, you will need to provide new employees with instructions about accessing Performance & Talent as part of your employee induction/onboarding materials.

4. At the agreed time, we will switch over your live system to use your SSO settings and SSO link, and your employees will then be able access Performance & Talent through your SSO link without having to enter their email and password. Your test SSO system will be deleted at the same time.

5. Success.




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