



FEI Systems

Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

WI 459635 Integrate OKTA and Enable Multifactor Authentication

Created by: Jesse Lindsey

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GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
7/6/2021	1.0	Jesse Lindsey	Initial document creation

STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
FEI Business Analyst	Charlene Pitt
FEI Account Manager	Anne Clements
DCF OITS Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Richard Power
DCF Business Analysts	Victor Gaines

SUPPORTING DOCUMENTS AND REFERENCES

- How to set up OKTA step by step
<https://repost.aws/knowledge-center/cognito-okta-saml-identity-provider>
- Adding OIDC identity providers to a user pool
<https://docs.aws.amazon.com/cognito/latest/developerguide/cognito-user-pools-oidc-idp.html>

TERMS AND DEFINITIONS

Terms	Description

SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

DCF requires the ability to easily and seamlessly onboard many new users, primarily at the provider level, into FASAMS Serverless UAT and Production without requiring a high level of effort from DCF personnel or vendor personnel. To achieve this, the requirement to use the DCF VPN will be removed when users access the Portal/SFTP/Web Services due to the effort required to add new users to the DCF VPN and will be replaced by OKTA multifactor authentication tool.

Scope Definition

FEI will work with the DCF networking team to remove the DCF VPN requirement to access the FASAMS Portal/SFTP/Web Services AND will implement the OKTA multifactor authentication to work with the AWS Cognito Security server. The “View Security Reports” permission will be removed with the implementation of OKTA.

End users will still be required to be on the DCF VPN to access FASAMS SSMS.

Assumptions, Constraints, Dependencies

- FEI and DCF networking teams will need to work together to remove the VPN access. This could require a series of meetings between the two networking teams.
- End users will still be required to be on the DCF VPN to access FASAMS SSMS.

EXISTING FUNCTIONALITY

FASAMS currently requires users to be on the DCF VPN to log into the FASAMS Portal/SFTP/Web Services.

PROPOSED FUNCTIONALITY

FASAMS users will be required to complete two factor authentication using OKTA to log into the FASAMS Portal/SFTP/Web Services. Users will not be required to be on the DCF VPN to log into the Portal/SFTP/Web Services.

INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	TFS Item #(s)	Description	Estimate/ Quote
6/29/2023		Initial Estimate	91-180
6/29/2023		Final Estimate	Final Estimate: Analysis - 40 Dev – 40 Test - 40 Acct / Project Management - 5 Total - 120

REQUIREMENTS

NOTES TO DEVELOPER

The OKTA solution will replace the requirement for users to log into FASAMS Portal/SFTP/Web Services through the DCF VPN.

1. INTEGRATE OKTA WITH THE AWS COGNITO SECURITY SERVER

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Integrate the OKTA two factor authentication, software into AWS Cognito Security Server <ul style="list-style-type: none"> • Users will be required to use OKTA to get into UAT and Production • Add details about the impact to SFTP and WebServices <ul style="list-style-type: none"> ○ SFTP – Will need to verify: <ul style="list-style-type: none"> ▪ “JobErrorReport” Folder ▪ TEDS Extract <ul style="list-style-type: none"> • TBD ○ Web Services – To be updated 		<input type="checkbox"/>	<input type="checkbox"/>
1.1	Update FASAMS so ONLY OKTA can be used as the multifactor authentication solution		<input type="checkbox"/>	<input type="checkbox"/>
1.2	Set up OKTA developer account at FEI for initial testing			

2. REMOVE VPN REQUIREMENT TO ACCESS FASAMS

Req. ID	Requirement	Ref. ID	Dev	QA
2.0	Remove the requirement for FASAMS users to be on the DCF VPN to log into the Portal/SFTP/ Web Services		<input type="checkbox"/>	<input type="checkbox"/>
2.1	FEI to coordinate meetings between DCF and FEI networking team to remove VPN requirement from FASAMS <ul style="list-style-type: none"> • Potentially 1-2 meeting per environment 		<input type="checkbox"/>	<input type="checkbox"/>
2.2	Coordination of DCF networking task: <ul style="list-style-type: none"> ○ Set up client, certifications, and other ID's <ul style="list-style-type: none"> ▪ 1 for UAT ▪ 1 for Production ○ Login Management: <ul style="list-style-type: none"> ▪ Set up groups ▪ Assign permission to those users for those groups <ul style="list-style-type: none"> • User specific: <ul style="list-style-type: none"> ○ DCF Security User Group • Possible options: <ul style="list-style-type: none"> ○ OKTA log in button (landing page) ○ OKTA integration page? ○ SSO thru OKTA (For DCF Personnel) 			

3. IMPLEMENT OKTA

Req. ID	Requirement	Ref. ID	Dev	QA
3.0	OKTA will be implemented one environment at a time: <ul style="list-style-type: none"> • UAT • Production 		<input type="checkbox"/>	<input type="checkbox"/>

4. TESTING

Req. ID	Requirement	Ref. ID	Dev	QA
4.0	Verify User is able to access: <ul style="list-style-type: none"> • FASAMS Portal/SFTP/Web Services via OKTA Multifactor Authentication • SSMS via VPN access 		<input type="checkbox"/>	<input type="checkbox"/>

5. REMOVE SECURITY CATEGORY PERMISSION

Req. ID	Requirement	Ref. ID	Dev	QA
5.0	Remove "View Security Reports" permission <ul style="list-style-type: none"> ○ Under Administration tab <ul style="list-style-type: none"> ▪ Under "Roles" – Select vertical ellipsis for DCF Administrator <ul style="list-style-type: none"> • Under Permissions, remove "View Security Reports" 		<input type="checkbox"/>	<input type="checkbox"/>

6. CREATE JOB AID FOR INSTRUCTING FASAMS USERS HOW TO USE OKTA

Req. ID	Requirement	Ref. ID	Dev	QA
6.0	Create OKTA (Multi-Factor Authentication) Job Aid <ul style="list-style-type: none"> ○ Document to be created to assist users with set up of OKTA 		<input type="checkbox"/>	<input type="checkbox"/>
6.1	Training sessions <ul style="list-style-type: none"> ○ To be set up with DCF users as needed 		<input type="checkbox"/>	<input type="checkbox"/>

ARE PAMPHLET UPDATE REQUIRED? YES NO

Update ID	Pamphlet Chapter/Sections requiring change	Completed by FEI	Approved by DCF
A1	Chapter 2: Access Management <ul style="list-style-type: none"> Update and review "Section 3: Basic Security Safeguards" with DCF 	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
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