

# Auto Provisioning with ZoomInfo and Okta Integration Guide

For administrators setting up ZoomInfo SCIM auto provisioning using Okta

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This document describes how to configure SCIM 2.0 auto-provisioning in Okta for ZoomInfo apps.

Contact [ZoomInfo Support](#) if you need additional assistance in setting up this configuration for your organization.

## Supported Features

The following provisioning features are supported:

Feature	Description
Push new users	Users created in Okta are also created in ZoomInfo.
Push profile updates	Updates made to the Okta user profile are pushed to ZoomInfo.

The following operations are supported:

Operation	Description
Create users	Creates or links a user in ZoomInfo when assigning the app to a user in Okta.
Update user attributes	Okta updates a user's attributes in ZoomInfo when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in ZoomInfo.
Deactivate users	Deactivates a user's ZoomInfo account when it is unassigned in Okta or their Okta account is deactivated. Accounts can be reactivated when the app is reassigned to a user in Okta.

## Requirements

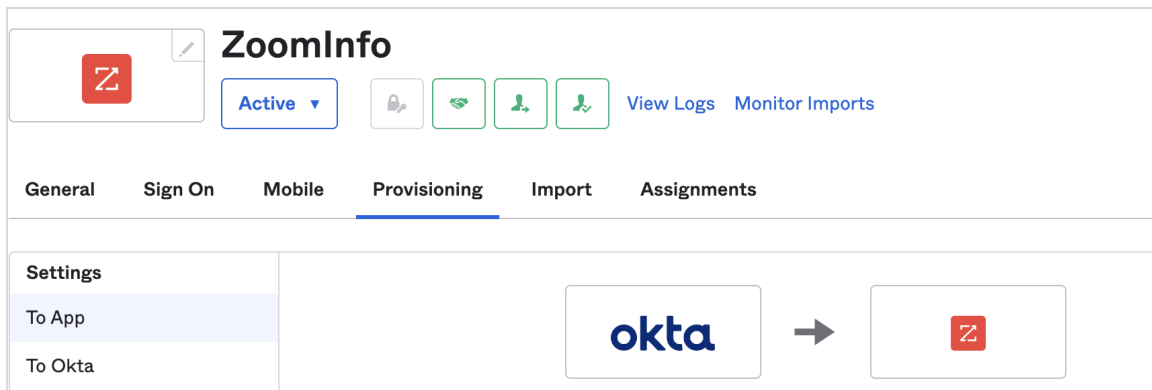
To configure SCIM auto provisioning you must have already configured SSO using the ZoomInfo Okta application. See the [Single Sign-On with ZoomInfo and Okta Integration Guide](#) for details.

# Configuration

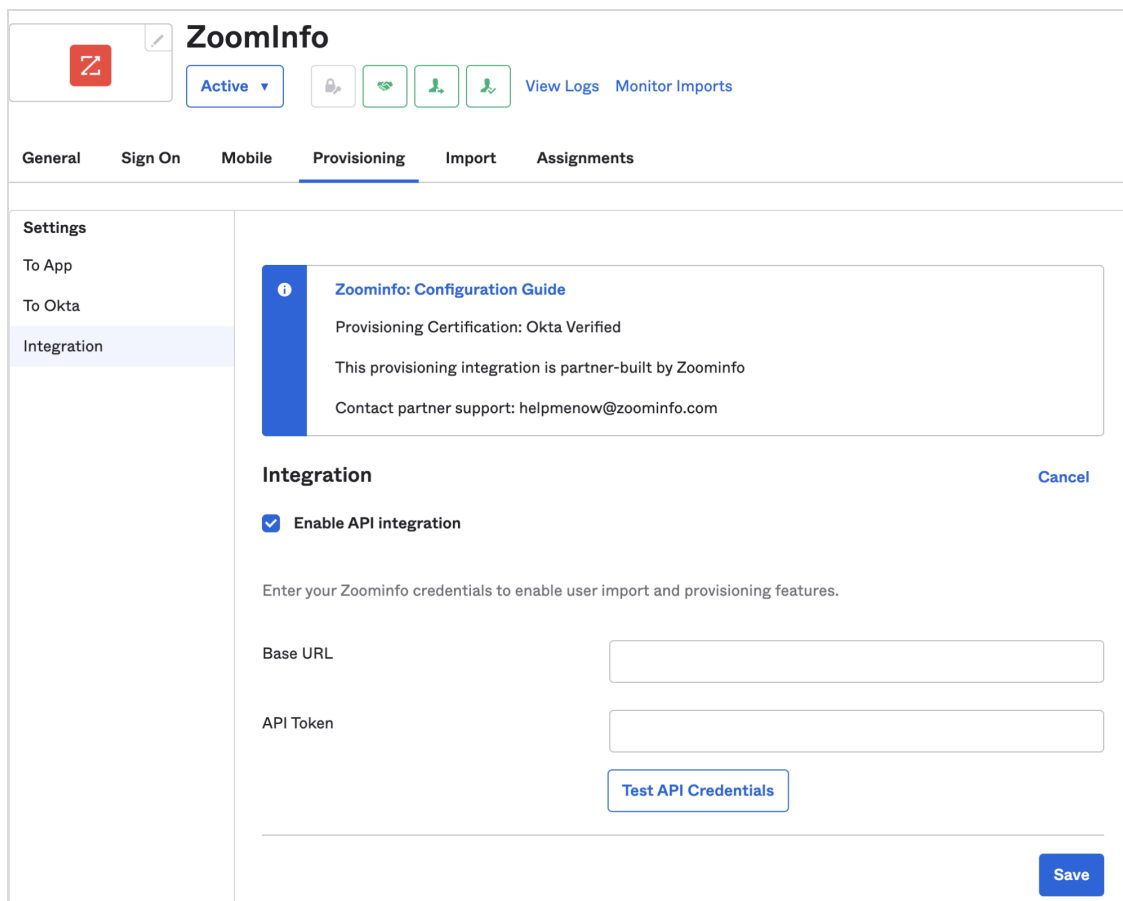
Configuration includes setting up the base configuration for SCIM provisioning and then assigning users. Since implementation steps are made in both Okta and the ZoomInfo Admin Portal, the ZoomInfo Admin and Okta Admin should coordinate on the following steps unless one person has access to both applications.

## Base Configuration

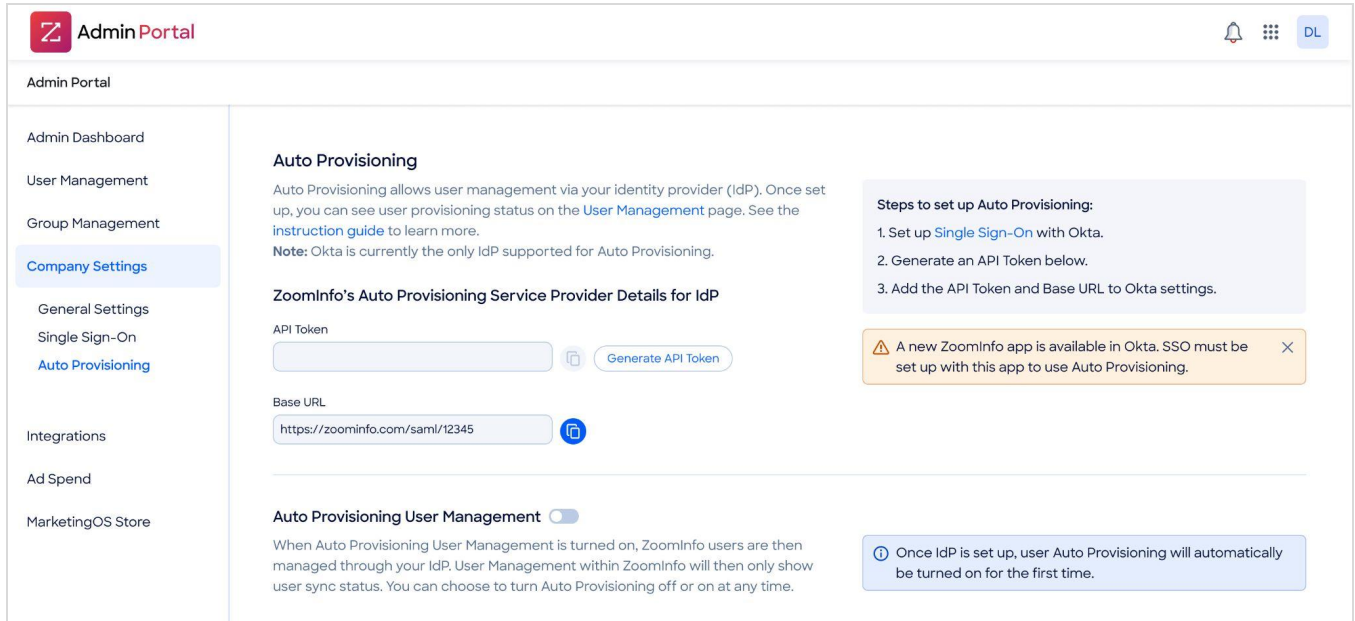
1. Navigate to the ZoomInfo app in Okta and click the **Provisioning** tab.



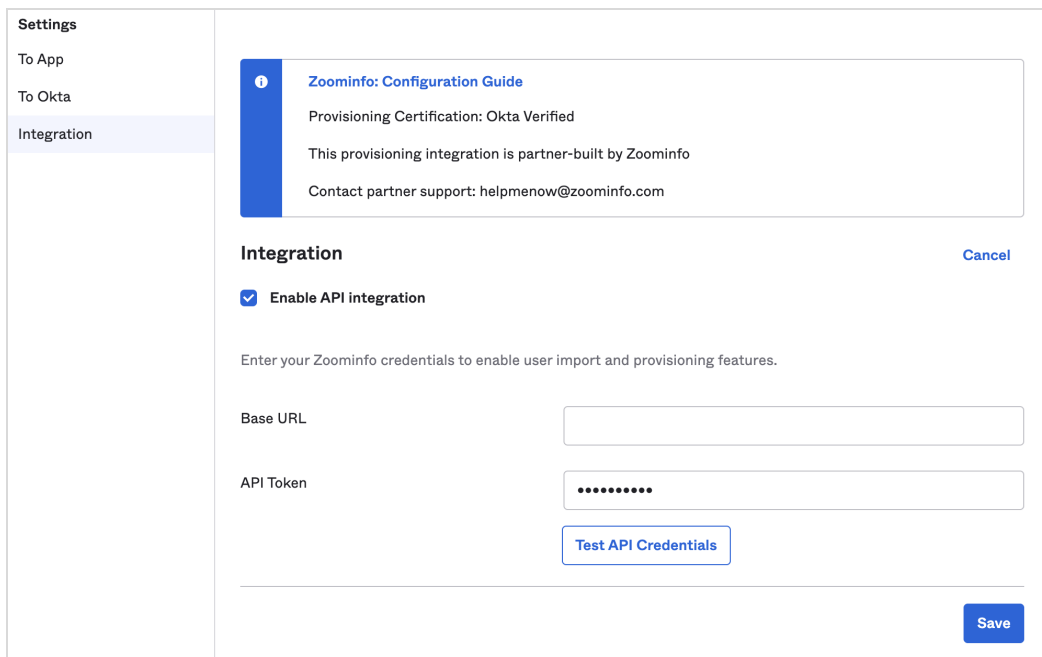
2. Click **Integration** on the left and click **Edit**.



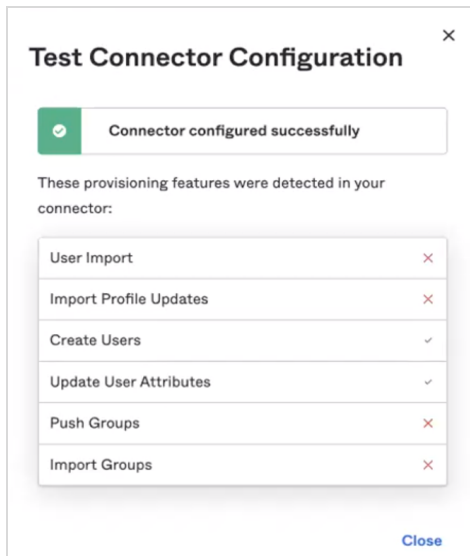
3. Select the **Enable API integration** checkbox.
4. Provide the **Base URL** and **API Token**. You can find these in the ZoomInfo Admin Portal.
  - a. Return to the ZoomInfo Admin Portal and go to **Company Settings > Auto Provisioning**.



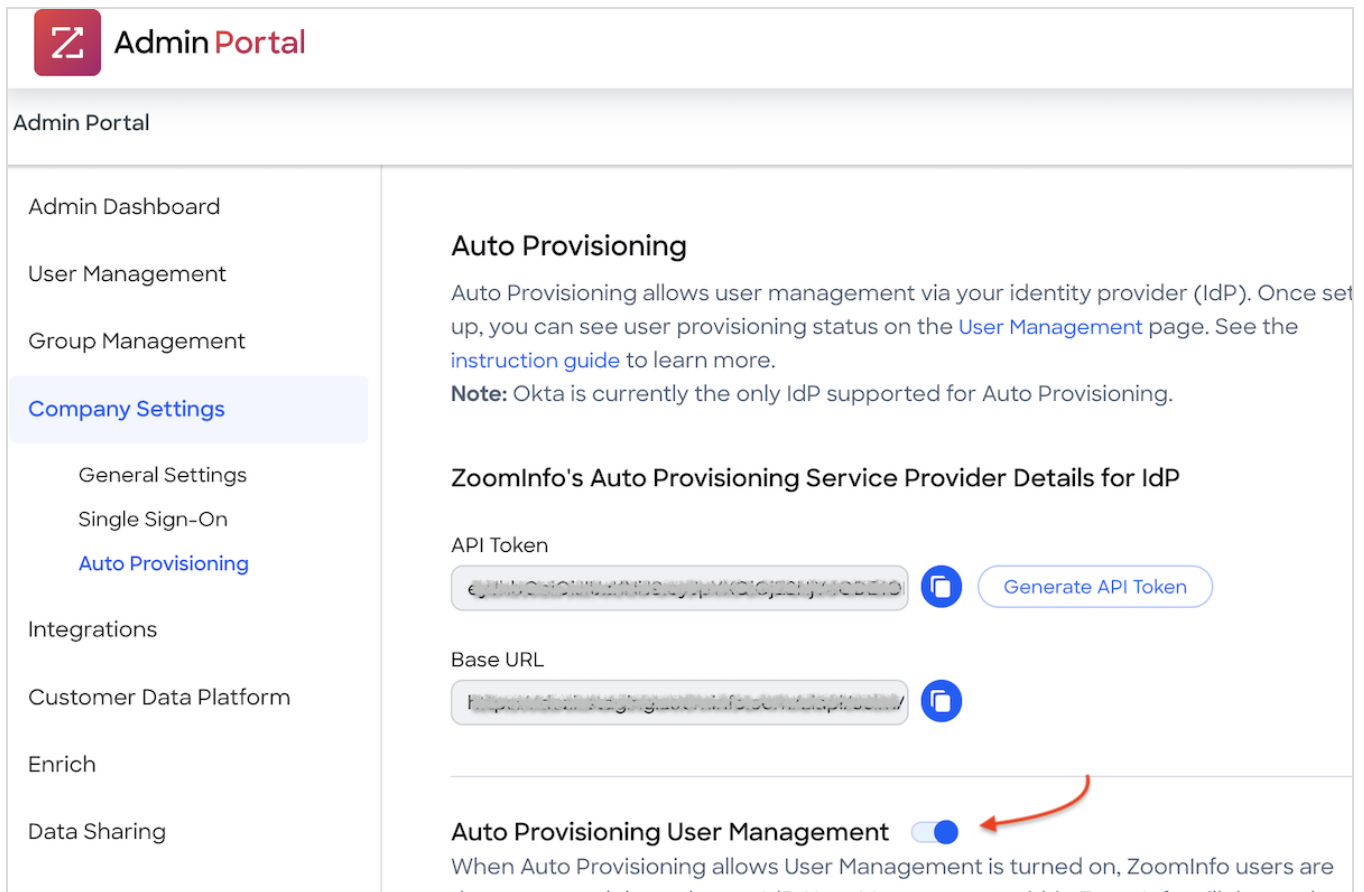
- b. Click **Generate API Token**. Both the **Base URL** and **API Token** are now available to copy.
5. Return to the **Provisioning** tab in the Okta ZoomInfo app and paste the **Base URL** and **API Token**.



6. Click **Test API Credentials** and ensure that the connector is successfully configured.



7. Click **Save**.
8. Return to the ZoomInfo Admin Portal, refresh the page, and ensure that the **Auto Provisioning User Management** toggle is automatically turned on.



9. Return to the **Provisioning** tab in the Okta ZoomInfo app and click **To App** on the left.

10. In the **Provisioning to App** section, select the **Enable** checkbox for:

- **Create Users**
- **Update User Attributes**
- **Deactivate Users**

**ZoomInfo** Active View Logs Monitor Imports

General Sign On Mobile **Provisioning** Import Assignments

Settings  
To App  
To Okta  
Integration

okta → ZoomInfo

**Provisioning to App** Cancel

**Create Users**  Enable

Creates or links a user in Zoominfo when assigning the app to a user in Okta.  
The **default username** used to create accounts is set to **Okta username**.

**Update User Attributes**  Enable

Okta updates a user's attributes in Zoominfo when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in Zoominfo.

**Deactivate Users**  Enable

Deactivates a user's Zoominfo account when it is unassigned in Okta or their Okta account is deactivated. Accounts can be reactivated if the app is reassigned to a user in Okta.

Save

11. Click **Save**.

12. Scroll to the **ZoomInfo Attribute Mappings** section.

13. Your attribute mappings are pre-configured as shown below.

Attribute	Attribute Type	Value	Apply on
Username userName	Personal	Configured in Sign On settings	
Given name givenName	Personal	user.firstName	Create and update
Family name familyName	Personal	user.lastName	Create and update
Email email	Personal	user.email	Create and update
Role ziRole	Group	"User"	Create and update
User Credit ziUserCredit	Group	"Limited"	Create (see note)
Credit Limit ziCreditLimit	Group	1000	Create (see note)
Reset Usage ziResetUsage	Group	"Monthly"	Create (see note)
Product ziProduct	Group	Not mapped. You can assign product(s) by <a href="#">group</a> or by <a href="#">individual people</a>	Not mapped



**Note:** These credit-related settings can be updated in the ZoomInfo Admin Portal, so these are set by default to **Create** in the Okta app.

**Important:** If you are an existing ZoomInfo customer and already have active users, ensure that when you add users to the Okta application, the `username` value and the `email` value match the ZoomInfo username and email address in the Admin Portal, as shown in the examples below.

## User name and email address values in the Okta app

Username	<input type="text" value="firstname.lastname@zoominfo.com"/>
	Overrides default value <a href="#">Reset</a>
Given name	<input type="text" value="FirstName"/>
	Overrides default value <a href="#">Reset</a>
Family name	<input type="text" value="LastName"/>
	Overrides default value <a href="#">Reset</a>
Email	<input type="text" value="firstname.lastname@zoominfo.com"/>
	Overrides default value <a href="#">Reset</a>

## User name and email address values in the ZoomInfo Admin Portal

* First Name:	<input type="text" value=""/>	Subscription:	<input type="text" value="Engage Bundle (Mon Oct 23 2023), S..."/>
* Last Name:	<input type="text" value=""/>	Bulk Credit Limit:	<input type="text" value="Set Limit to"/> <input type="text" value="1000"/>
* Email:	<input type="text" value=""/> 	Bulk Credit Limit:	<input checked="" type="radio"/> Monthly <input type="radio"/> Manual <a href="#">Reset Usage</a>
* User Name:	<input type="checkbox"/> Set User Name equal to Email <input type="text" value=""/> 	Bulk Credit Usage:	<input type="text" value="0/1,000"/>
Is Admin	<input type="checkbox"/> Admin	Monthly Credit Usage:	<input type="text" value="0/1,000"/>
Group:	<a href="#">Assign to Existing Group</a>   <a href="#">New Group</a>	Additional Actions:	<input type="text" value="-Select-"/>
Engage:	<a href="#">Assign Profile</a>   <a href="#">Add to Team</a>	Trials:	<input type="text" value="-Select-"/>

## Assign Users

There are two ways to assign users to ZoomInfo products - as individuals (People) or by one or more Groups. Most organizations will use groups.

### Assign by People

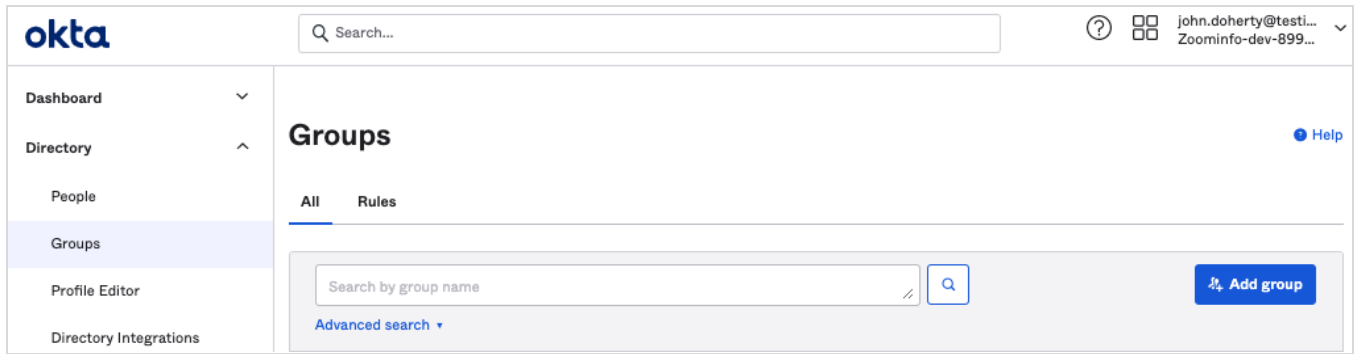
Smaller organizations can assign individuals (People) and choose the subscribed product(s).

### Assign by Group(s)

Assigning users to product(s) using groups is more appropriate for larger organizations. To create a group:

1. In the left navigation for the Okta admin portal, select **Directory > Groups**.





2. Click **Add group** and provide a name and optional description.

**Add group**

Name

Description (optional)

**Save** **Cancel**

3. Click **Save**.
4. Click the group you just created (in this example, *SalesOS Users*).

**Groups** Help

**All** **Rules**

Search by group name

Advanced search ▾

Group source type  Showing 10

Group name	People	Applications
<input type="radio"/> <a href="#">Alla Group B</a> No description	7	1
<input checked="" type="radio"/> <a href="#">SalesOS Users</a> Group containing all SalesOS users	0	0

5. Click the **Applications** tab.

← Back to Groups

## SalesOS Users

Group containing all SalesOS users

Created: 09/27/2022 Last modified: 09/27/2022 [View logs](#)

People Applications Profile Directories Admin roles

### Applications

[Assign applications](#)

01101110  
01101111  
01101100  
01101100  
01101101  
01101110  
01100111

No Apps assigned to this group  
Use Manage Apps to assign apps to this group

#### Group Members

People, apps and directories can be members of a group. People are automatically assigned any apps that are members of a group.

Directories, like Active Directory or Workday with profile management enabled, will manage user profiles when they are members of a group.

Use **Assign People** to add people to this group. Use **Assign applications** to do the equivalent for applications.

- Click **Assign applications** and search for *ZoomInfo*.

### Assign Applications to SalesOS Users

zoominfo tech

ZoomInfo Technologies

[Assign](#)

- Click **Assign**.
- Scroll down to the **Product** section and select one or more appropriate products (in this example, *SalesOS*).

**Note:** To see the list of subscribed ZoomInfo products for your organization, go to the **ZoomInfo Admin Portal** and select the **Admin Dashboard**. The list of packages is provided on the **Overview** tab.

- The list includes the total number of seats, available seats and expiration dates for each product.
- If your users need more than one product (for example, SalesOS and Engage), create a group with all applicable products selected.

Product

- SalesOS
- MarketingOS
- TalentOS
- Engage
- ZI Chat
- Reachout Lite

Overrides default value [Reset](#)

9. Click **Save and Go Back** and then click **Done**.

10. Click the **People** tab for the group.

← Back to Groups

## SalesOS Users

Group containing all SalesOS users

Created: 09/27/2022 Last modified: 09/27/2022 [View logs](#)

**People** Applications Profile Directories Admin roles

### People

Search for users by first name, primary email or username

Advanced search ▾

Showing 0 of 0

Person & username	Status	Managed

11. Click **Assign people** and select the users you want to include in the group.

12. When finished, click **Done**.

13. Return to the ZoomInfo app (**Application > Application** and search for *ZoomInfo*).

Directory ▾

Customizations ▾

Applications ▾


Applications

Self Service

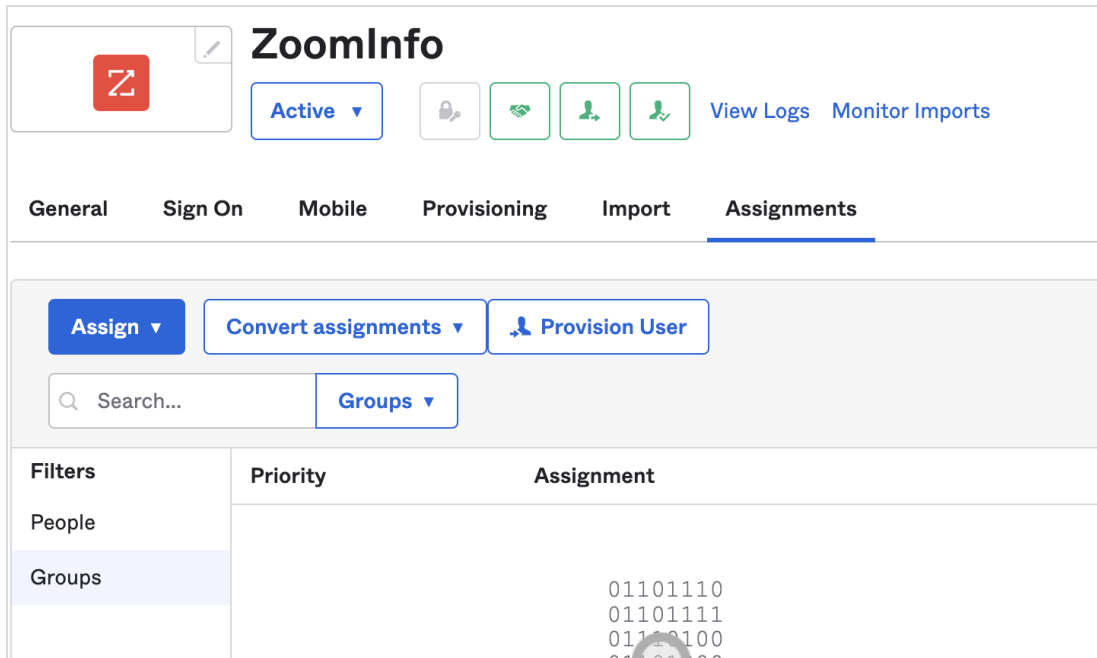
## Applications

[Create App Integration](#) [Browse App Catalog](#) [Assign Users to App](#) [More ▾](#)

Q ZoomInfo

STATUS		
ACTIVE		ZoomInfo <input type="button" value="Settings"/>

14. On the **Assignments** tab, select **Groups** under **Filters**.



The group you created (e.g., *SalesOS*) is listed as assigned to the ZoomInfo app.

## Known Issues/Troubleshooting

### Product assignment issues

We recommend that the ZoomInfo admin verify the number of seats available per product before performing user/group assignment.

- For any product(s), if there are more users than the seats available, user provisioning will fail.
- Provisioning will also fail if you do not associate a subscribed product with assigned users as described in [Assign Users](#).

In addition, here are some examples of issues that could occur with product assignment:

- If you associate a user or group with both the SalesOS and MarketingOS products, but your organization has only subscribed to SalesOS, the user or group provisioning will fail.
- If you associate a user or a group with SalesOS, but your organization has only subscribed to MarketingOS, provisioning will fail.
- If you assign a user to SalesOS and there are no more available SalesOS seats, then the user provisioning will fail. For example, if there are 100 SalesOS seats and you assign 120 users to the ZoomInfo Okta application, user provisioning will fail for the last 20 users. You will be notified of this failure in Okta SCIM client (indicated by a red X icon next to the user). In this case, your company would need to purchase additional 20 SalesOS seats before you can reassign users to the application to successfully provision them.

- If you assign a user SalesOS and MarketingOS and if there are no more available MarketingOS seats, then the user provisioning will fail.

### **Disabling SSO and auto provisioning**

If you want to disable SSO and auto provisioning, ensure that you do so in this *exact order* in the ZoomInfo Admin Portal:

1. Go to **Company Settings > Auto Provisioning** and turn off the **Auto Provisioning User Management** toggle.
2. Go to **Company Settings > Single Sign On** and click **Reset All** in the upper right.

### **Troubleshooting**

When viewing people in the **Assignments** tab you may see a red ball icon next to a person's name. Refresh the page to try to resolve it.