

# Auto Provisioning with ZoomInfo and Okta Integration Guide

For administrators setting up ZoomInfo SCIM auto provisioning using Okta

Supported Features	2
Requirements	2
Configuration	3
Base Configuration	3
Assign Users	8
Assign by People	8
Assign by Group(s)	8
Known Issues/Troubleshooting	12

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

Contact <u>ZoomInfo Support</u> 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 app to a user in Okta.	
Update user attributes Okta updates a user's attributes in ZoomInfo when t 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 <u>Single Sign-On with ZoomInfo and Okta Integration</u> <u>Guide</u> 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.

	Z	oomIn	fo					
Z		Active 🔻		<b>J</b>	View Logs M	onitor Import	S	
General	Sign On	Mobile	Provisioning	Import	Assignments	;		
Settings								
То Арр					okta	-	Z	
To Okta								

2. Click Integration on the left and click Edit.

Z	Z	oomInf	fo
		ctive <b>v</b>	Solution Imports
General	Sign On	Mobile	Provisioning Import Assignments
Settings			
To App To Okta		0	Zoominfo: Configuration Guide
Integration			Provisioning Certification: Okta Verified
			This provisioning integration is partner-built by Zoominfo Contact partner support: helpmenow@zoominfo.com
		Integ	egration Cancel
		🗹 Er	Enable API integration
		Enter	r your Zoominfo credentials to enable user import and provisioning features.
		Base L	URL
		API To	ōken
			Test API Credentials
			Save

- 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**.

Z Admin Portal		۵ 🗰	DL
Admin Portal			
Admin Dashboard User Management	Auto Provisioning Auto Provisioning allows user management via your identity provider (IdP). Once set up, you can see user provisioning status on the <b>User Management</b> page. See the	Steps to set up Auto Provisioning:	
Group Management Company Settings	instruction guide to learn more. Note: Okta is currently the only IdP supported for Auto Provisioning.	1. Set up Single Sign-On with Okta. 2. Generate an API Token below.	
General Settings Single Sign-On Auto Provisioning	ZoomInfo's Auto Provisioning Service Provider Details for IdP API Token Generate API Token	<ul> <li>3. Add the API Token and Base URL to Okta settings.</li> <li>A new ZoomInfo app is available in Okta. SSO must be set up with this app to use Auto Provisioning.</li> </ul>	×
Integrations Ad Spend	Base URL https://zoominfo.com/saml/12345		
MarketingOS Store	Auto Provisioning User Management  When Auto Provisioning User Management is turned on, ZoomInfo users are then managed through your IdP. User Management within ZoomInfo will then only show user sync status. You can choose to turn Auto Provisioning off or on at any time.	① Once IdP is set up, user Auto Provisioning will automaticall be turned on for the first time.	у

- 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**.

Settings To App To Okta Integration	<ul> <li>Zoominfo: Configuration Guide</li> <li>Provisioning Certification: Okta Ver</li> <li>This provisioning integration is part</li> <li>Contact partner support: helpmeno</li> </ul>	ner-built by Zoominfo
	Integration C Enable API integration Enter your Zoominfo credentials to enable use Base URL	Cancel
	API Token	Test API Credentials Save

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

	essfully
nese provisioning features were detec onnector:	ted in your:
User Import	×
Import Profile Updates	×
Create Users	~
Update User Attributes	v
	×
Push Groups	

- 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.

Z Admin Portal	
Admin Portal	
Admin Dashboard	
User Management	Auto Provisioning Auto Provisioning allows user management via your identity provider (IdP). Once set
Group Management	up, you can see user provisioning status on the User Management page. See the instruction guide to learn more.
Company Settings	<b>Note:</b> Okta is currently the only IdP supported for Auto Provisioning.
General Settings	ZoomInfo's Auto Provisioning Service Provider Details for IdP
Single Sign-On	
Auto Provisioning	
Integrations	
Customer Data Platform	
Enrich	
Data Sharing	Auto Provisioning User Management  When Auto Provisioning allows User Management is turned on, ZoomInfo users are then recovered the second se

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

	oomInfo		
Z	ctive v 🕒 🛸 🎝 View Log	gs Monitor Imports	
General Sign On	Mobile Provisioning Import Assign	nments	
Settings			
То Арр	okto		
To Okta			
Integration	Provisioning to App		Cancel
	Create Users		✓ Enable
	Creates or links a user in Zoominfo when ass	igning the app to a user in Okta.	
	The default username used to create account	ts is set to <b>Okta username.</b>	
	Update User Attributes		Enable
	Okta updates a user's attributes in Zoominfo user profile will automatically overwrite the c		-
	Deactivate Users		Enable
	Deactivates a user's Zoominfo account when can be reactivated if the app is reassigned to	-	ount is deactivated. Accounts
			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
<b>Usename</b> userName	Personal	Configured in Sign On settings	
<b>Given name</b> givenName	Personal	user.firstName	Create and update
Family name familyName	Personal	user.lastName	Create and update
<b>Email</b> email	Personal	user.email	Create and update
<b>Role</b> ziRole	Group	"User"	Create and update
<b>User Credit</b> ziUserCredit	Group	"Limited"	Create (see note)
<b>Credit Limit</b> ziCreditLimit	Group	1000	Create (see note)
<b>Reset Usage</b> ziResetUsage	Group	"Monthly"	Create (see note)
Product ziProduct	Group	Not mapped. You can assign product(s) by <u>group</u> or by <u>individual people</u>	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	firstname.lastname@zoominfo.com
	Overrides default value <b>OReset</b>
Given name	FirstName
	Overrides default value <b>OReset</b>
Family name	LastName
	Overrides default value <b>OReset</b>
Email	firstname.lastname@zoominfo.com
	Overrides default value <b>OReset</b>

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

* First Name:		Subscription:	Engage Bundle (Mon Oct 23 2023), S 🗸
* Last Name:		Bulk Credit Limit:	Set Limit to 🗸 1000
* Email:		Bulk Credit Limit:	Monthly     Manual     Reset Usage
* User Name:	Set User Name equal to Email	Bulk Credit Usage:	0/1,000
Is Admin	(Admin)	Monthly Credit Usage:	0/1,000
Group:	Assign to Existing Group   New Group	Additional Actions:	-Select-
Engage:	Assign Profile   Add to Team	Trials:	-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**.

okta		Q Search	?	D john.doherty@testi D Zoominfo-dev-899
Dashboard	~			
Directory	^	Groups		Help
People		All Rules		
Groups				
Profile Editor		Search by group name		샤 Add group
Directory Integrations		Advanced search +		

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

Add group	
Name	SalesOS Users
Description (optional)	Group containing all SalesOS users
	Save Cancel

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

Groups		e Hel
All Rules		
Search by group name	" Q	ቶ, Add group
Group source type All		Showing 10
Group name	People	Applications
O Alla Group B No description	7	1
O SalesOS Users Group containing all SalesOS users	0	0

5. Click the **Applications** tab.

← Back to Groups	
SalesOS Users	Actions v
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	Group Members People, apps and directories can be
01101110 01101111	members of a group. People are automatically assigned any apps that are members of a group.
01101100 010100 0110100 0110101 01101110 01100111	Directories, like Active Directory or Workday with profile management enabled, will manage user profiles when they are members of a group.
No Apps assigned to this group Use Manage Apps to assign apps to this group	Use <b>Assign People</b> to add people to this group. Use <b>Assign applications</b> to do the equivalent for applications.

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

Assign Applications to SalesOS Users	×
zoominfo tech	
Zoominto ZoomInfo Technologies	Assign

- 7. Click Assign.
- 8. 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 OReset

- 9. Click Save and Go Back and then click Done.
- 10. Click the **People** tab for the group.

⊢ Back to Groups		
SalesOS Users		Actions
aroup containing all SalesOS users		
© Created: 09/27/2022 © Last modified: 09/27/2022 V	fiew logs	
People Applications Profile Directories	Admin roles	
	ame 🔏	T Assign people
People	ame 🔏	T Assign people
People Search for users by first name, primary email or userna	ame // Q	Assign people Showing 0 of 0

- 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	~	Applications	Hel
Customizations	~	Create App Integration Browse App Catalog Assign Users to App More v	
Applications	^		
Applications		Q Zoominfo 🛞	
Self Service		STATUS Zoominfo	o 🔹

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

Z	ZoomInfo	
General Sign C	On Mobile Provisioning Import Assignments	
Assign <b>v</b>	Convert assignments 🔻 🙏 Provision User	
Q Search	Groups <b>v</b>	
Filters	Priority Assignment	
People		
Groups	01101110	
	01101111 011100	

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 <u>Assign Users</u>.

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.