

# 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.

## SSO Requirement

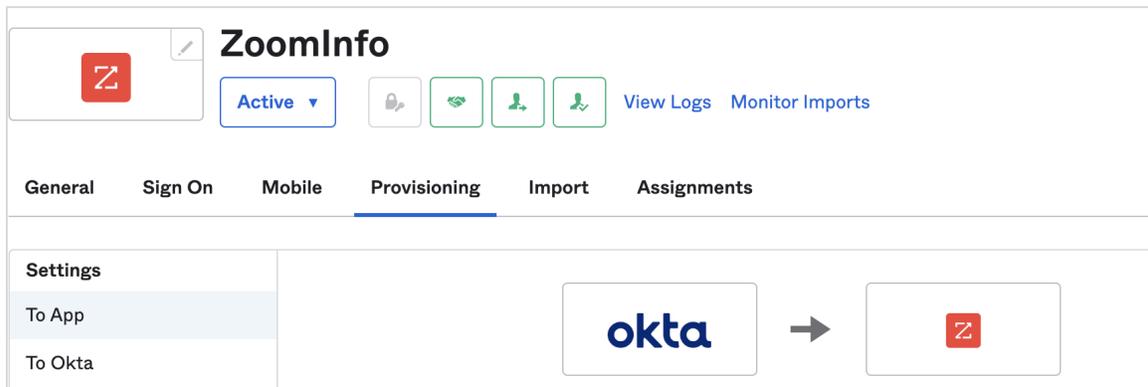
To configure SCIM auto provisioning you must have already configured SSO using the ZoomInfo Okta application. See the [Single Sign-On with ZoomInfo and Okta Integration Guide](#) for details.

# Configuration

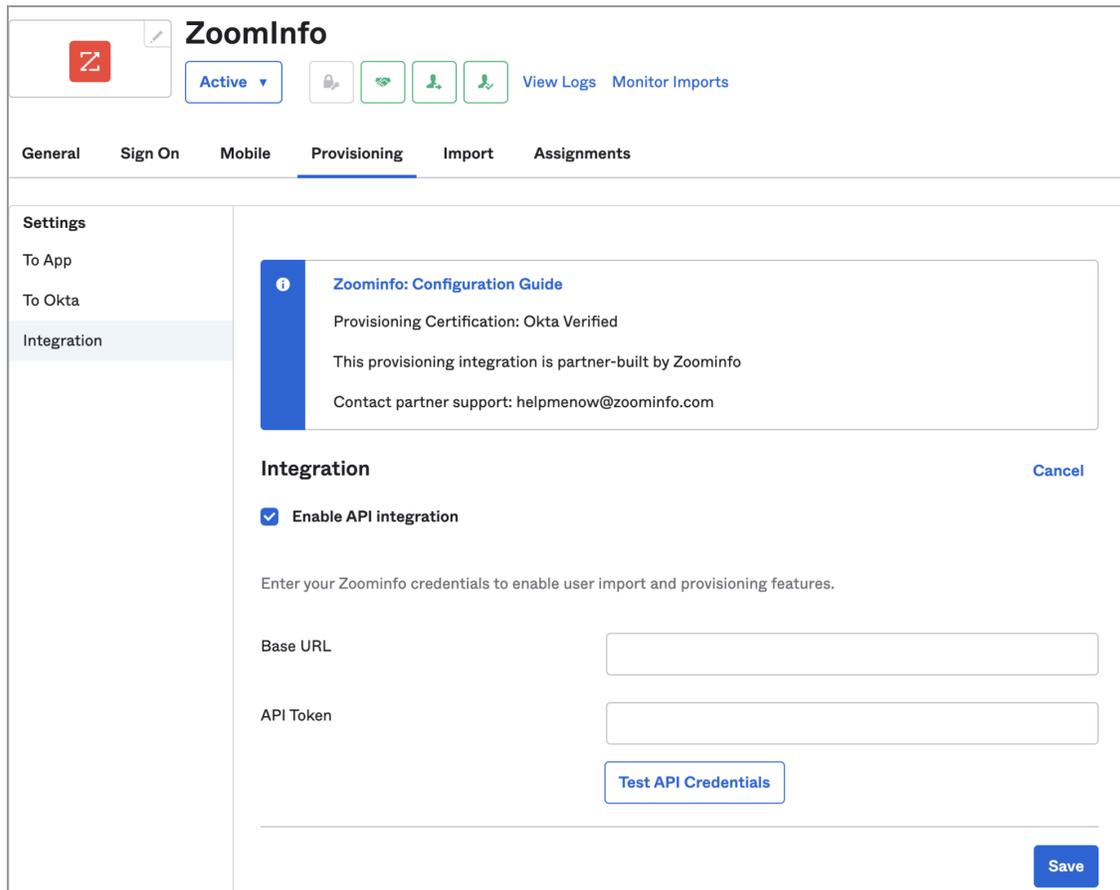
Configuration includes setting up the base configuration for SCIM provisioning and then assigning users. Since implementation steps are made in both Okta and the ZoomInfo Admin Portal, the ZoomInfo Admin and Okta Admin should coordinate on the following steps unless one person has access to both applications.

## 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 **User Management > Users > Auto Provisioning**.
  - b. Select the **IdP** tab.

The screenshot shows the 'Auto Provisioning' page in the ZoomInfo Admin Portal, specifically the 'IdP' tab. The page title is 'Auto Provisioning / CRM IdP'. The main heading is 'IdP Auto Provisioning'. Below this, there is a paragraph explaining that Auto Provisioning allows user management via an identity provider (IdP) and provides a link to an 'instruction guide'. A note states that Okta and Azure are currently the only supported IdPs. There is a dropdown menu for 'IdP Type' set to 'Okta' and a 'Reset' button. Below this is a section titled 'ZoomInfo's Auto Provisioning Service Provider Details for IdP' which contains two input fields: 'API Token' and 'Base URL'. Each field has a copy icon and a 'Regenerate API Token' button. To the right of the main content is a light blue box with the title 'Steps to set up Auto Provisioning:' and a four-step list: 1. Set up Single Sign-On with Okta. 2. Select your identity provider (IdP). 3. Generate an API Token below. 4. Add the API Token and Base URL to Okta or Azure settings. At the bottom left, there is a toggle switch for 'Manage Users through IdP' which is currently turned on. Below the toggle is a paragraph explaining that when turned on, ZoomInfo users are managed through the IdP. At the bottom right, there is a light blue information box with an 'i' icon and the text: 'Once IdP is processed and subscription sets are created, user Auto Provisioning will automatically turn on for the first time'.

- c. Click **Generate API Token**. Both the **Base URL** and **API Token** are now available to copy.

- Return to the **Provisioning** tab in the Okta ZoomInfo app and paste the **Base URL** and **API Token**.

The screenshot shows the 'Integration' settings page for the ZoomInfo app. On the left is a navigation menu with 'Settings', 'To App', 'To Okta', and 'Integration' (selected). The main content area has a blue header with an information icon and the text: 'Zoominfo: Configuration Guide', 'Provisioning Certification: Okta Verified', 'This provisioning integration is partner-built by Zoominfo', and 'Contact partner support: helpmenow@zoominfo.com'. Below this is the 'Integration' section with a 'Cancel' link. A checkbox labeled 'Enable API integration' is checked. A note says 'Enter your Zoominfo credentials to enable user import and provisioning features.' There are two input fields: 'Base URL' and 'API Token' (masked with dots). A 'Test API Credentials' button is below the API Token field. At the bottom right is a 'Save' button.

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

The screenshot shows a 'Test Connector Configuration' dialog box with a close button (X) in the top right. It features a green success message: 'Connector configured successfully'. Below this, it states 'These provisioning features were detected in your connector:' followed by a table of features:

User Import	✗
Import Profile Updates	✗
Create Users	✓
Update User Attributes	✓
Push Groups	✗
Import Groups	✗

A 'Close' button is located at the bottom right of the dialog.

- Click **Save**.
- Return to the **Auto Provisioning > IdP** page in the ZoomInfo Admin Portal, refresh the page, and ensure that the **Manage Users through IdP** toggle is automatically turned on.

## Manage Users through IdP

When 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.

Once SCIM client app successfully connects to SCIM service, user Auto Provisioning will automatically turn on for the first time.

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, you must select the **Enable** checkbox for:

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

The screenshot shows the ZoomInfo app configuration interface. At the top, there is a header with the ZoomInfo logo, a status indicator (Active), and navigation links for View Logs and Monitor Imports. Below the header, there are tabs for General, Sign On, Mobile, Provisioning (selected), Import, and Assignments. The main content area is titled 'Provisioning to App' and features a diagram showing 'okta' pointing to the ZoomInfo logo. Three settings are listed, each with an 'Enable' checkbox checked:

- Create Users**: 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**: 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 if the app is reassigned to a user in Okta.

Buttons for 'Cancel' and 'Save' are visible at the bottom right of the configuration area.

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 they 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

**Note (for existing ZoomInfo orgs):** If you have an existing ZoomInfo implementation with users defined in the ZoomInfo Admin Portal, you can import these users to the ZoomInfo Okta app. See [Existing ZoomInfo Org Scenario: Import Users from ZoomInfo](#) for details.

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

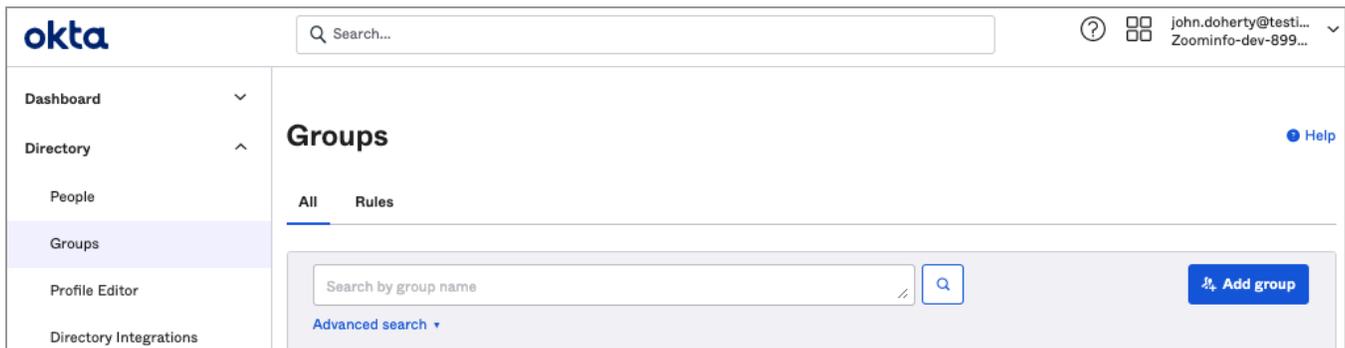
### Assign by People

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

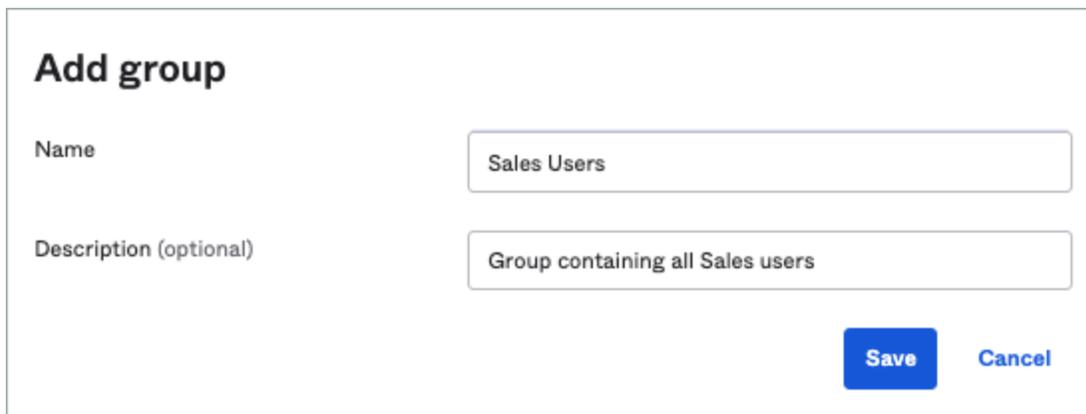
### Assign by Group(s)

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.

A screenshot of the 'Add group' form in the Okta admin portal. The form has two input fields: 'Name' with the value 'Sales Users' and 'Description (optional)' with the value 'Group containing all Sales users'. At the bottom right, there are two buttons: a blue 'Save' button and a 'Cancel' button.

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

# Groups

[Help](#)

All Rules

Search by group name



[Add group](#)

Advanced search ▾

Group source type

All

Showing 10

Group name	People	Applications
<a href="#">Alla Group B</a> No description	7	1
<a href="#">Sales Users</a> Group containing all Sales users	0	0

5. Click the **Applications** tab.

[← Back to Groups](#)

## Sales Users

[Actions ▾](#)

Group containing all Sales users

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

People **Applications** Profile Directories Admin roles

### Applications

[Assign applications](#)

01101110  
01101111  
01100100  
01010000  
01101001  
01101110  
01100111

No Apps assigned to this group  
Use [Manage Apps](#) to assign apps to this group

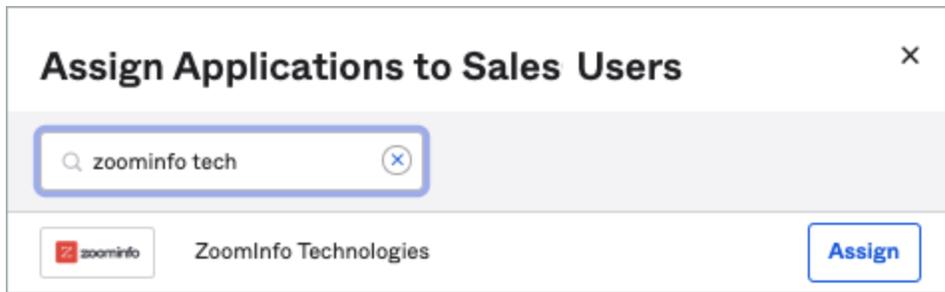
#### Group Members

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.

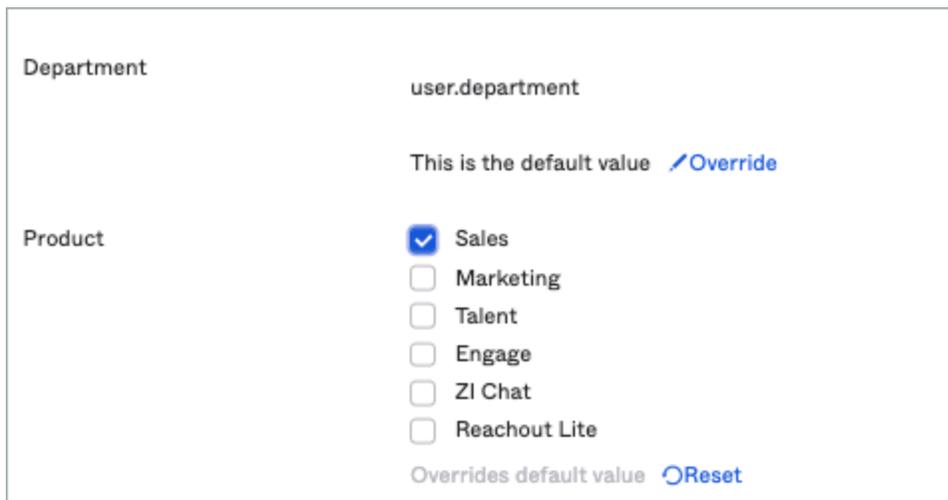
6. Click **Assign applications** and search for *ZoomInfo*.



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

**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, ZoomInfo Sales and ZoomInfo Marketing), create a group with all applicable products selected.



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

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

The screenshot shows the 'Sales Users' group page. At the top left, there is a 'Back to Groups' link. The group name 'Sales Users' is prominently displayed, with an 'Actions' dropdown menu to its right. Below the group name, it states 'Group containing all Sales users' and provides metadata: 'Created: 09/27/2022' and 'Last modified: 09/27/2022', with a 'View logs' link. A navigation bar contains tabs for 'People', 'Applications', 'Profile', 'Directories', and 'Admin roles', with 'People' being the active tab. The main content area is titled 'People' and features a search bar with the placeholder text 'Search for users by first name, primary email or username'. To the right of the search bar are a magnifying glass icon, a three-dot menu, and an 'Assign people' button. Below the search bar is an 'Advanced search' dropdown. A table below shows 'Showing 0 of 0' results. The table header includes columns for 'Person & username', 'Status', and 'Managed'.

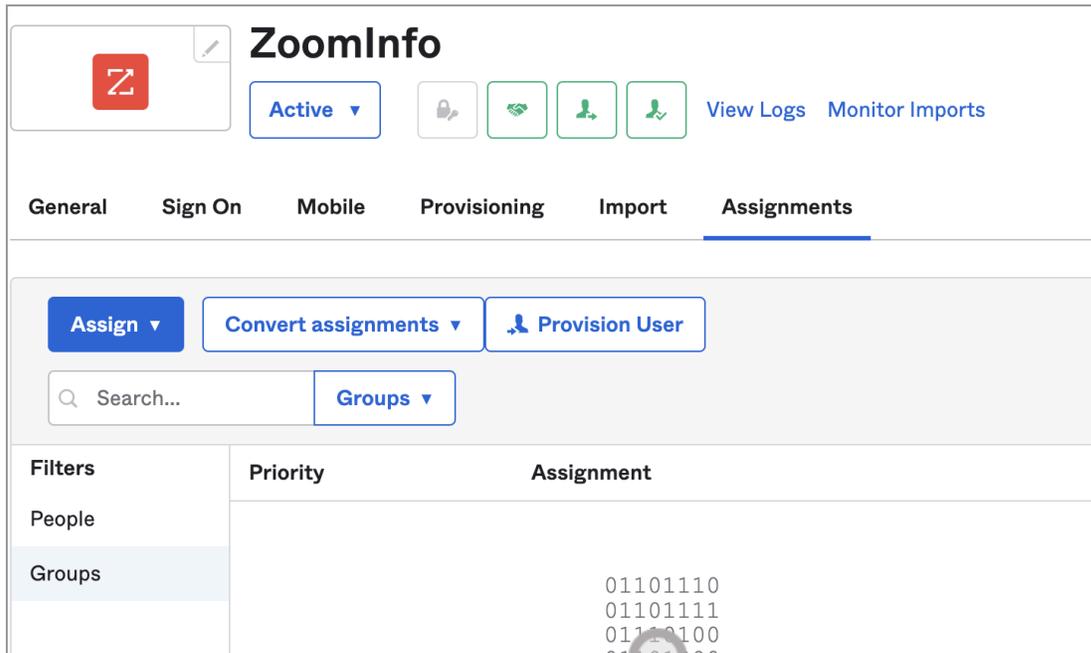
11. Click **Assign people** and select the users you want to include in the group.

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

13. Return to the **Applications** tab in the ZoomInfo app and search for *ZoomInfo*.

The screenshot shows the 'Applications' page. On the left is a sidebar menu with categories: 'Directory', 'Customizations', 'Applications', and 'Self Service'. The 'Applications' category is expanded, showing 'Applications' and 'Self Service' sub-items. The main content area is titled 'Applications' and contains several buttons: 'Create App Integration', 'Browse App Catalog', 'Assign Users to App', and 'More'. Below these buttons is a search bar containing the text 'ZoomInfo'. A table below the search bar shows a search result for 'ZoomInfo' with a red 'Z' icon. The table header includes columns for 'STATUS' and '75'.

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



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

## Existing ZoomInfo Org Scenario: Import Users from ZoomInfo

If you are an existing ZoomInfo organization that already has users defined in the ZoomInfo Admin Portal (**Users Management > Users**), you can import them into the Okta app.

### Before You Begin

Note the following considerations:

- **Groups:** The ZoomInfo Okta app does not support the import of groups. You can only import individual users into the Okta app. If using groups, you will need to assign these in the Okta app after the import is complete.
- **User Attributes:** The Okta app supports the import of the following People-type attributes: `userName`, `givenName`, `familyName`, and `email`.

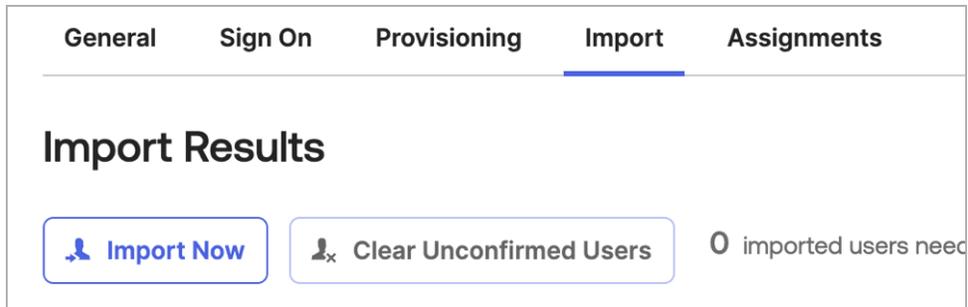
**Note:** Okta's "Import users" process, which retrieves user information from SCIM responses, expects an email type for each user email as defined in the SCIM protocol (allowing multiple emails with types). However, ZoomInfo's system only supports a single email address per user and does not categorize email types. Consequently, SCIM responses from ZoomInfo will contain a null value for email type.

- **Group Attributes:** You will need to apply any Group-type attributes in the Okta app. These attributes include `ziRole`, `ziUserCredit`, `ziCreditLimit`, `ziResetUsage`, and `ziProduct`. See [this table](#) for a full list of supported attributes in the ZoomInfo Okta app.

## Procedure

To import your ZoomInfo users:

1. Establish the configuration as described in [Base Configuration](#).
2. Navigate to the ZoomInfo app in Okta and click the **Import** tab.



3. Click **Import Now**.

A list of users displays. Review and confirm the list of users you want to import and complete the import process.

4. Once imported, you can assign these individual users to groups and set other Group-type attributes such as role, credit-related settings, and product associations as described in [Assign Users](#).

**Note:** User assignment status (scim-active) differs from user activeness in the ZoomInfo platform (platform-active). A user is platform-active if they have a product seat. A user is scim-active if assigned to a SCIM client app and their information is synced between the client and server. The 'active' attribute in SCIM requests and responses pertains only to scim-active status.

## Known Issues/Troubleshooting

### Provisioning issues

If provisioning fails, ensure that the **Provisioning to App** settings are all set to **Enable** as described in [step 10](#) of [Base Configuration](#).

### 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 ZoomInfo Sales and ZoomInfo Marketing products, but your organization has only subscribed to Sales, the user or group provisioning will fail.
- If you associate a user or a group with ZoomInfo Sales, but your organization has only subscribed to ZoomInfo Marketing, provisioning will fail.
- If you assign a user to ZoomInfo Sales and there are no more available Sales seats, then the user provisioning will fail. For example, if there are 100 Sales 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 Sales seats before you can reassign users to the application to successfully provision them.
- If you assign a user Sales and Marketing and if there are no more available Marketing 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 **Admin Portal > User Management > Users > Auto Provisioning**.
2. Select the **IdP** tab.
3. Turn off the **Auto Provisioning User Management** toggle.
4. Go to **User Management > 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.