Administrator Guide

Configure user provisioning with Okta

This guide provides details about SmartSolve and Okta provisioning integration, including features, requirements and configurations.

# Supported Features

Provisioning is only available for Internal Actors in SmartSolve. A user will not be available for provisioning if internal actor is migrated to Person.

Currently only downstream provisioning from Okta to SmartSolve is supported.

Following user account operations are supported. Syncing groups is not yet available.

1. Create new Account

New users created from Okta will be provisioned in SmartSolve. User will be enabled to log in and default role name: ‘UNIVERSAL REQUIREMENT ROLE’ will be assigned.

1. Update user's account details

Supported User attributes updated in Okta will be updated in SmartSolve.

1. Activate a user account
Reactivating a user in Okta will enable log in for the user in SmartSolve.

Note: All roles previously assigned will be intact.

1. Deactivate a user account

Deactivating a user in Okta will disable log in for the user in SmartSolve.

# Prerequisites

Contact SmartSolve representative to enable the provisioning through Okta. Your SmartSolve contact will provide you with the Base URL and User account details required to authenticate and enable the integration.

Please add following attributes in the Okta User Profile if not available.

|  |  |  |
| --- | --- | --- |
| Display Name | Variable Name | Data type |
| Domain | domain | string |
| Home Phone | homePhone | string |
| Fax | faxPhone | string |
| Site | site | string |
| Home Fax Phone | homeFaxPhone | string |
| Actor Code | actorCode | string |

# Configuration Steps

1. Log in to **Okta**, add **SmartSolve** Application
2. From the application, click on the provisioning tab and click **Integration**
3. Check **Enable** **API integration**
4. Enter **Base URL** provided by your SmartSolve support team
5. Enter **User credentials** created for the Integration



1. Click on **Test API Credentials**. Click on Save if passes
2. Click on **To App** under **Settings**
3. Click **Edit** and select **Enable** for the following options.



# Configure Mapping

The table below describes the attributes used to provision in SmartSolve.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Attributes | SmartSolve Fields | Notes | Required in SmartSolve? | Default Value set in SmartSolve |
| Actor Code | Actor Code | This attribute is used to uniquely identify the user in SmartSolve. The value should not contain any special characters. This value is also used as Id in Okta and should only apply on create | Yes |  |
| Username | Logon User | The value should not contain any special characters. By default, only user login email prefix is set. | Yes |  |
| Name |
| Given name | First Name |  | Yes |  |
| Family name | Last Name |  | Yes |  |
| Middle Initial | Middle Initial | Set Initials from the middle name. The value should be less than 10 characters  | No |  |
| Emails |
| Primary email | E-mail Address | Only primary email address will be used in SmartSolve. The domain in the email should match the domain of the tenant set in SmartSolve | Yes |  |
| Primary email type |  | SmartSolve sets Primary email as primary and of type work |  |  |
|  |  |  |  |  |
| Phone Numbers – Only one number for each of the following phone number type is supported in SmartSolve. |
| Primary phone | Work Telephone |  | No |  |
| Primary phone type |  | Set Primary phone type to work.SmartSolve sets phone number of type work as primary. |  |  |
| Mobile Phone  | Cell Telephone |  | No |  |
| Mobile Phone Type |  | Set phone type to mobile for Mobile Phone |  |  |
| Home Phone | Home Telephone |  | No |  |
| Home Phone Type |  | Set phone type to home for Home Phone |  |  |
| Fax Phone | Work Fax No |  | No |  |
| Fax Phone Type |  | Set phone type to fax for Fax Phone |  |  |
| Home Fax Phone  | Home Fax No |  | No |  |
| Home Fax Phone Type |  | Set phone type to homeFax for Home Fax Phone |  |  |
| Addresses - Only one primary address of type work will be used in SmartSolve. Address is not required but all properties in address must be available |
| Street address | Street |  | No |  |
| Locality | City |  | No |  |
| Region | State |  | No |  |
| Postal Code | Zip Code |  | No |  |
| Country code | Country |  | No |  |
| Address type |  | Set address type to work for this address |  |  |
|  |
| Locale | Preferred Locale |  | Yes | us-en |
| Time zone | Preferred TimeZone | SmartSolve supports windows timezone name. Please refer <https://docs.microsoft.com/en-us/windows-hardware/manufacture/desktop/default-time-zones> | Yes | Record will be created based on the time zone information in Server |
|  |  |  |  |  |
| Title | Title | Users Job Title | Yes |  |
| Organization | Organization | Assigned Organization needs to be in the SmartSolve application | Yes | GLOBAL |
| Department | Department | Assigned Department needs to be in the SmartSolve application | Yes | DEFAULT |
| Site | Site | Assigned Site needs to be in the SmartSolve application | No |  |
| Manager value | Manager | Username of the Manager | Yes | SMARTADMIN |
| Domain | Domain | Domain where the user can be authenticated | Yes | Server name |

# Troubleshooting

**Actor Code Changed in SmartSolve**

The value from Actor Code is used as unique identifier in Okta. This value should not be changed in SmartSolve. If the Actor Code has changed in the SmartSolve for the user. The assigned user in Okta will not be able to get pushed for an update. An error with message “No user returned for user [UserName]” will be returned by Okta. Unassign user from the application, update Actor Code in user profile and reassign to re-sync.

**Status of the user shows active in the SmartSolve after the user was deactivated in OKTA**

This is working as intended. Deactivating a user in Okta will disable log in for the user in SmartSolve but the Status of the user will remain Active.