Administrator Guide

Configure user provisioning with Okta
Push Groups

## Migration Steps to upgrade to new Version

Existing applications have been updated to include the following features:

1. Group Push
2. **Previous ver. of IQVIA SmartSolve application that uses Basic authentication has been deprecated to use Header Authentication**

To take advantage of these updates, you must add the new **IQVIA SmartSolve** application in your Okta org and must have **SmartSolve ver. 11 2022 R3** installed.

Follow steps below to migrate from the old application to a newly created instance.

1. Login to you Okta org as an Admin
2. Open the Admin UI.
3. Navigate to Applications and click **Browse App Catalog**
4. Find **IQVIA SmartSolve** and add
5. Configure the application including Provisioning. [See Guide](#_User_Provisioning)
6. After SCIM Provisioning has been enabled, go to the **Assignments** tab of your new **IQVIA SmartSolve**. Click **Assign** and start assigning the same users/groups that are assigned to you old **IQVIA SmartSolve** instance.
Note: Make sure you assign all the users to your new **IQVIA SmartSolve** instance to avoid any accidental de-provisioning/loss of access to your users.

7. Go back to your Admin Dashboard.
8. Open your old **IQVIA SmartSolve** app instance.
9. Go to the **Provisioning** tab.
10. On the **Settings** Section, Click on API
11. Click on **Edit** and uncheck **Enable API Integration**. Click **Save**.

12. You can now deactivate or delete your old **IQVIA SmartSolve** app instance and continue using the new app you added.

**NOTE**:

* If you were using SAML as the sign-on mode for you old **IQVIA SmartSolve** app instance, you will need to set up SAML on your new **IQVIA SmartSolve** app instance in OKTA (Recommended) or maintain the old **IQVIA SmartSolve** app instance to ensure that the SAML functionality continues to work.
* If you were using your old **IQVIA SmartSolve** app as a profile master for certain Okta attributes, you would need to set your new **IQVIA SmartSolve** as the profile master for the same attributes.

# User Provisioning

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

## Supported Features

Provisioning is only available for Internal Actors and Person in SmartSolve. New users are provision into SmartSolve as Internal Actor.

Currently only downstream provisioning from Okta to SmartSolve is supported.

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

1. Create a new Account

New users created from Okta will be provisioned in SmartSolve. Users 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

This feature is available starting **SmartSolve ver. 11 2022 R3**. 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 the 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 into SmartSolve using **User credentials** created for the Integration
2. Create **PAT**


**Note: The generated token has validity of one year.**

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 Generated **Token**.
6. Click on **Test API Credentials**. Click on Save if passes
7. Click on **To App** under **Settings**
8. 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.

# Group Push

The Groups on Okta are mapped to Roles in Smartsolve.

## System limitations:

Group Creation:
The ROLE CODE and ROLE NAME are derived from the Group name. The system limits the number of characters allowed to set for the Name of the group to 40 characters during Group Creation.

A new Role is created as Functional Type in SmartSolve.

Group Name Update:
The system limits the number of characters allowed to update the Name of the group to 60 characters.

Group Deletion
Group deletion will not delete the group from SmartSolve.

Person/Internal Actor role activation:
The person or Internal Actor are added to the role in pending state and would require manual activation.