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

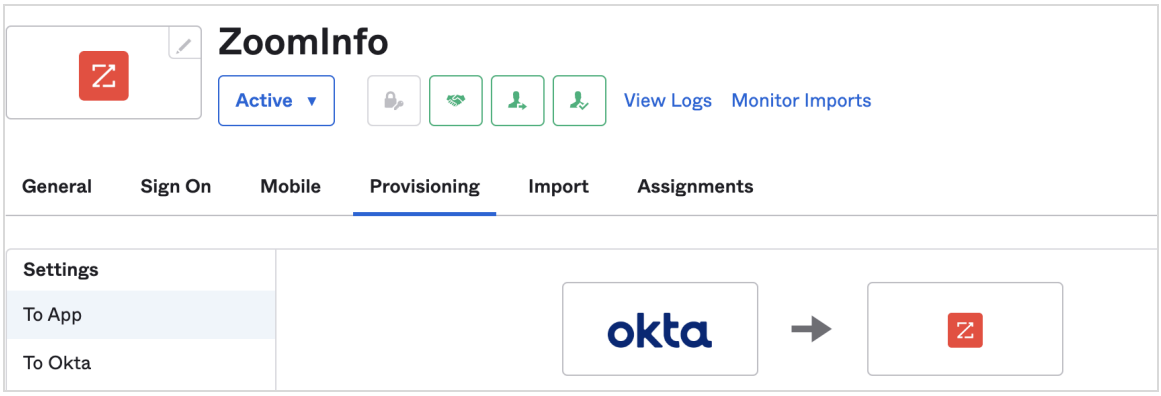
To configure SCIM auto provisioning you must have already configured SSO using the ZoomInfo Okta application. See the Single Sign-On with ZoomInfo and Okta Integration Guide for details.

Configuration

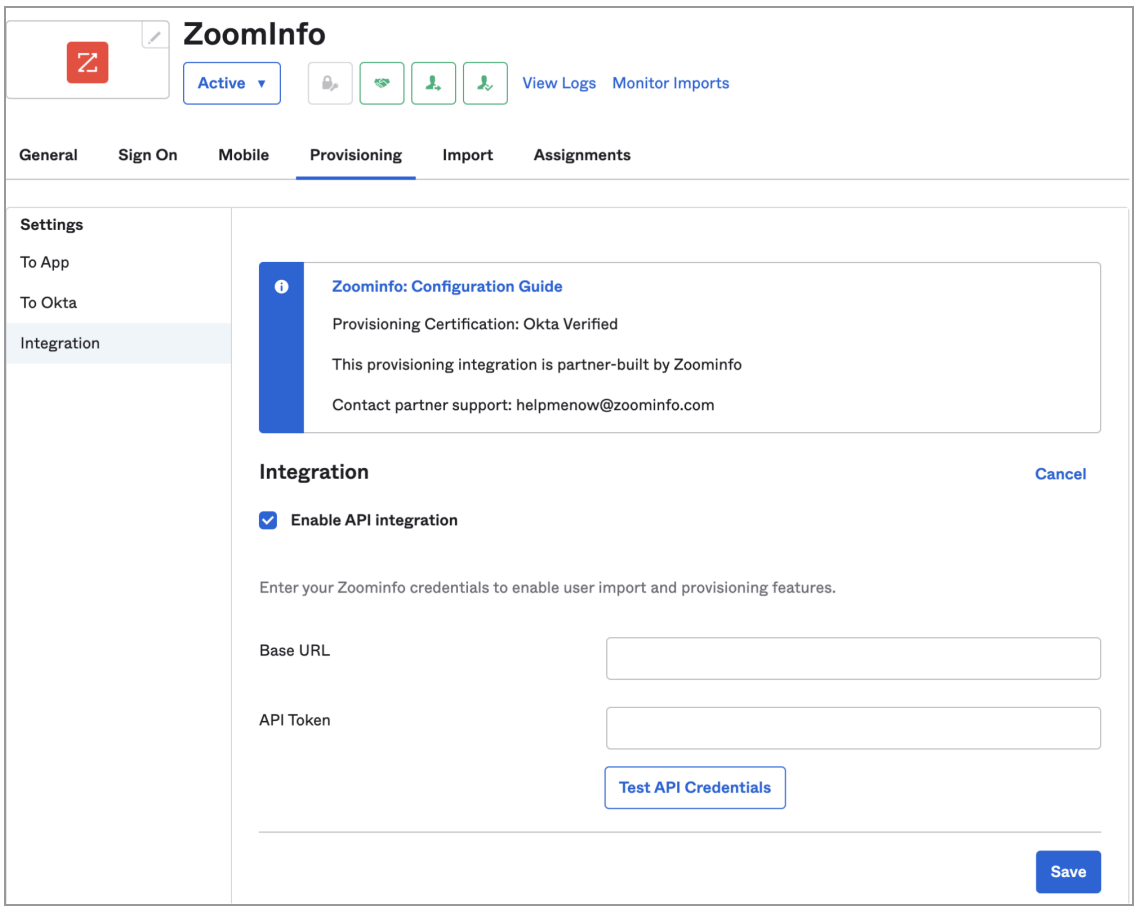
Configuration includes setting up the base configuration for SCIM provisioning and then assigning users. Since implementation steps are made in both Okta and the ZoomInfo Admin Portal, the ZoomInfo Admin and Okta Admin should coordinate on the following steps unless one person has access to both applications.

Base Configuration

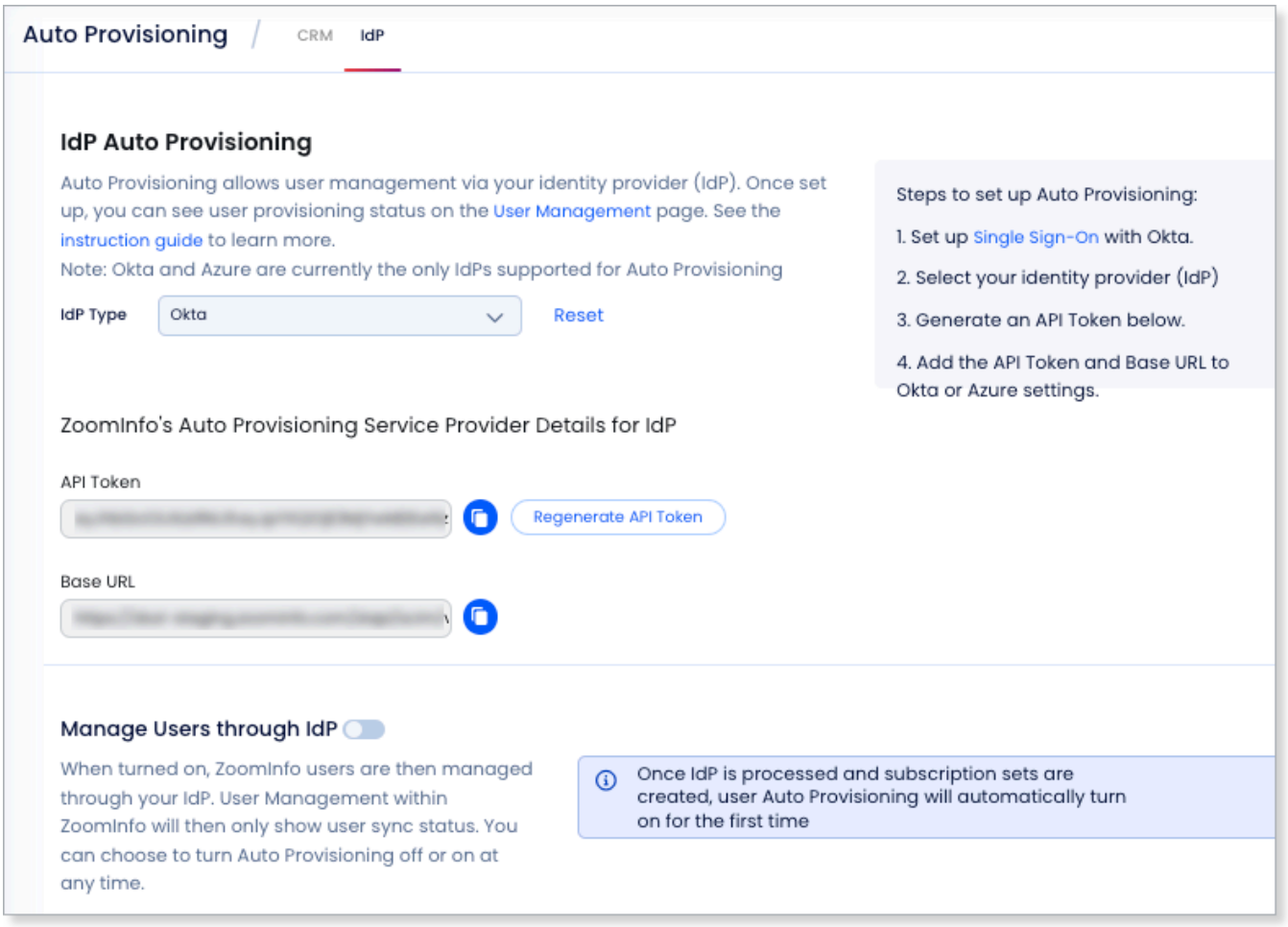
1. Navigate to the ZoomInfo app in Okta and click the **Provisioning** tab.



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

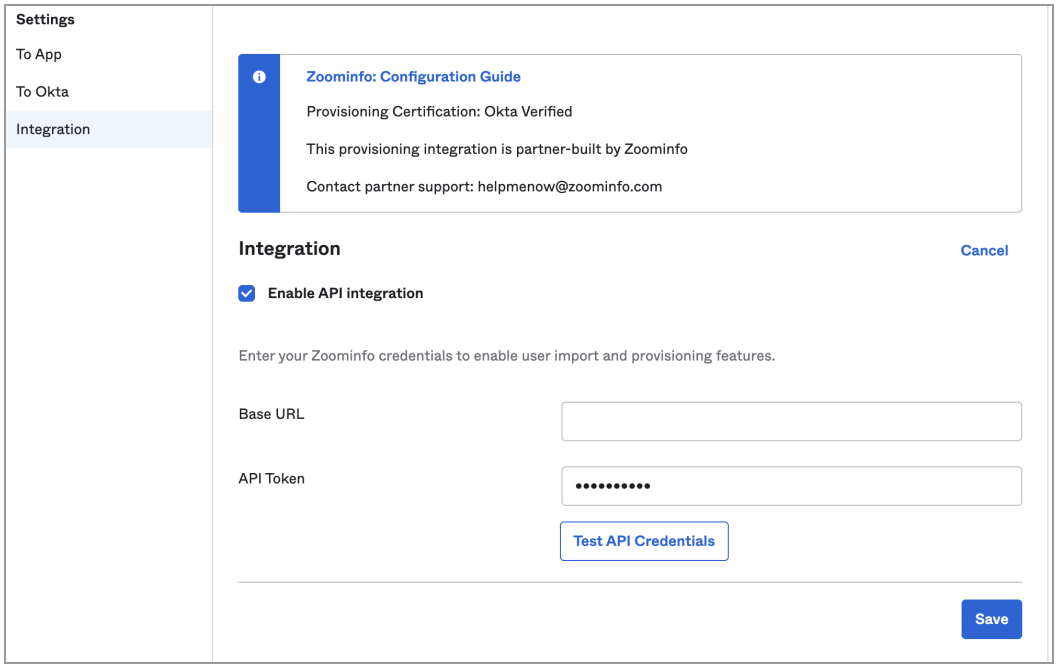


3. Select the **Enable API integration** checkbox.
4. Provide the **Base URL** and **API Token**. You can find these in the ZoomInfo Admin Portal.
    a. Return to the ZoomInfo Admin Portal and go to **User Management > Users > Auto Provisioning**.
    b. Select the **IdP** tab.

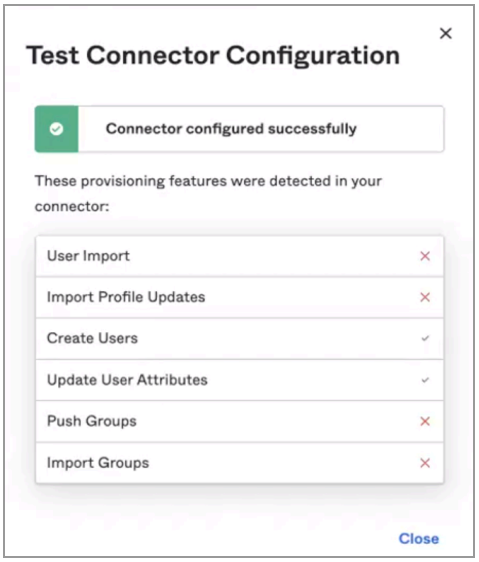


    c. Click **Generate API Token**. Both the **Base URL** and **API Token** are now available to copy.

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

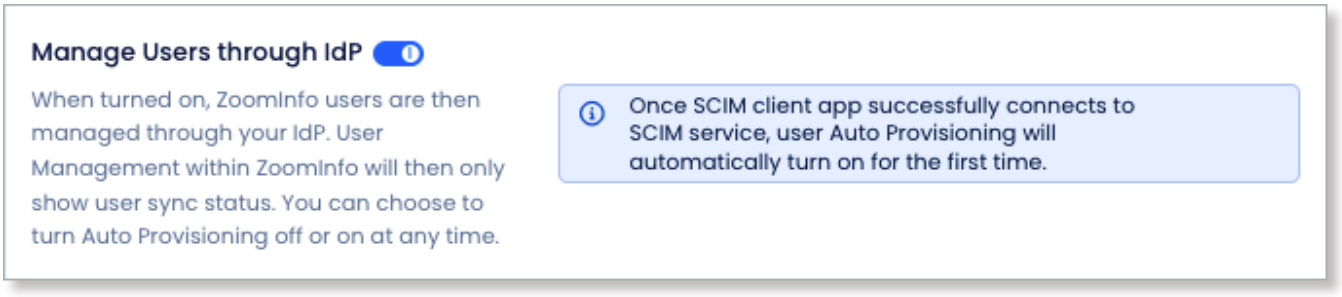


6. Click **Test API Credentials** and ensure that the connector is successfully configured.

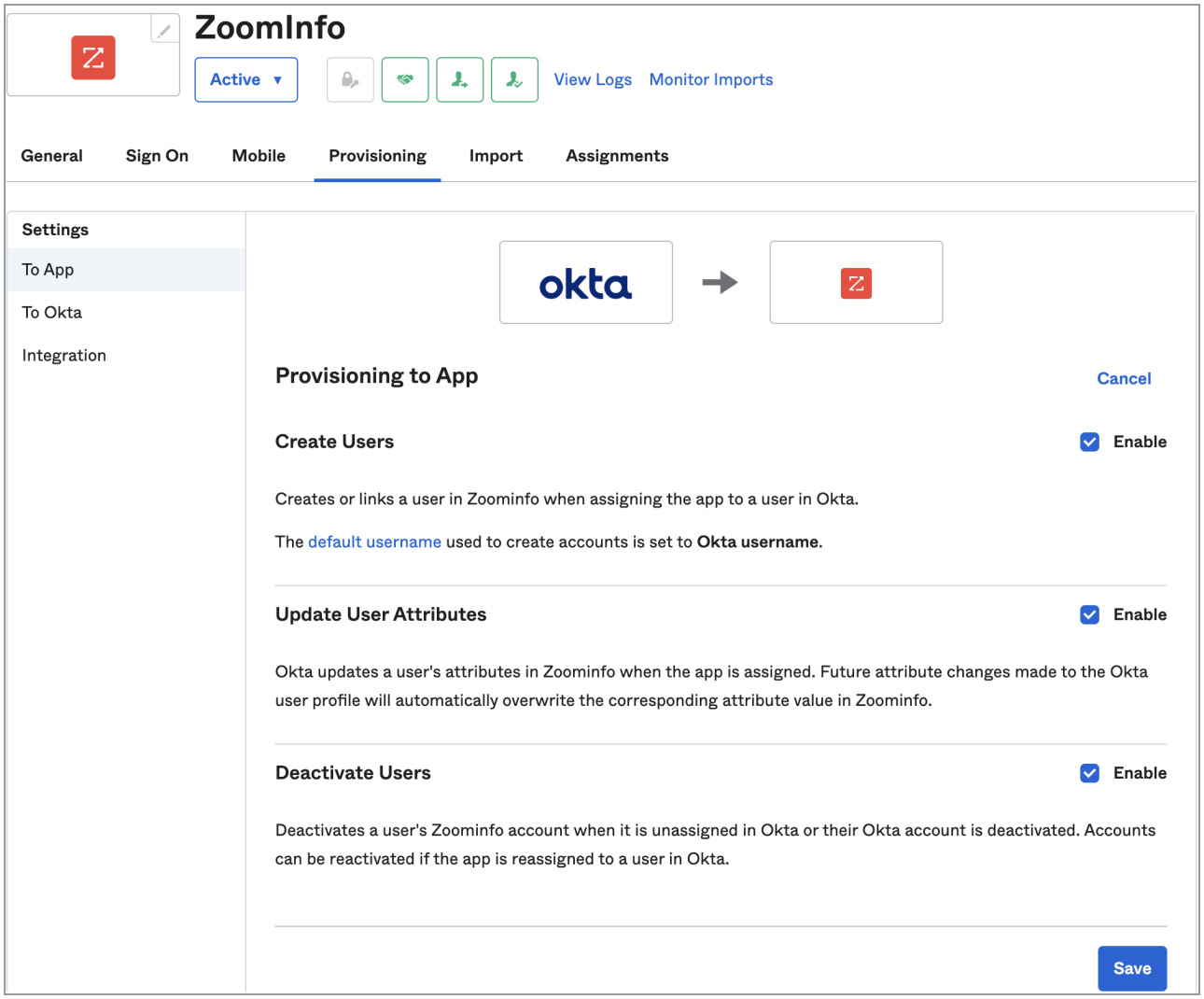


7. Click **Save**.

8. Return to the **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.



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**



11. Click **Save**.

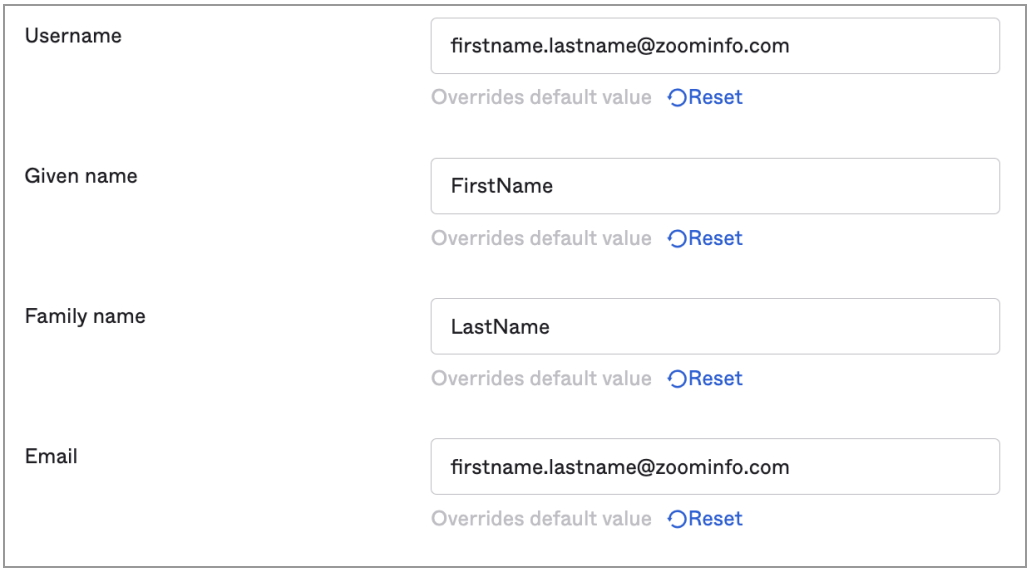
12. Scroll to the **ZoomInfo Attribute Mappings** section.
13. Your attribute mappings are pre-configured as shown below.

Attribute	Attribute Type	Value	Apply on
Usename `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 group or by individual people	Not mapped

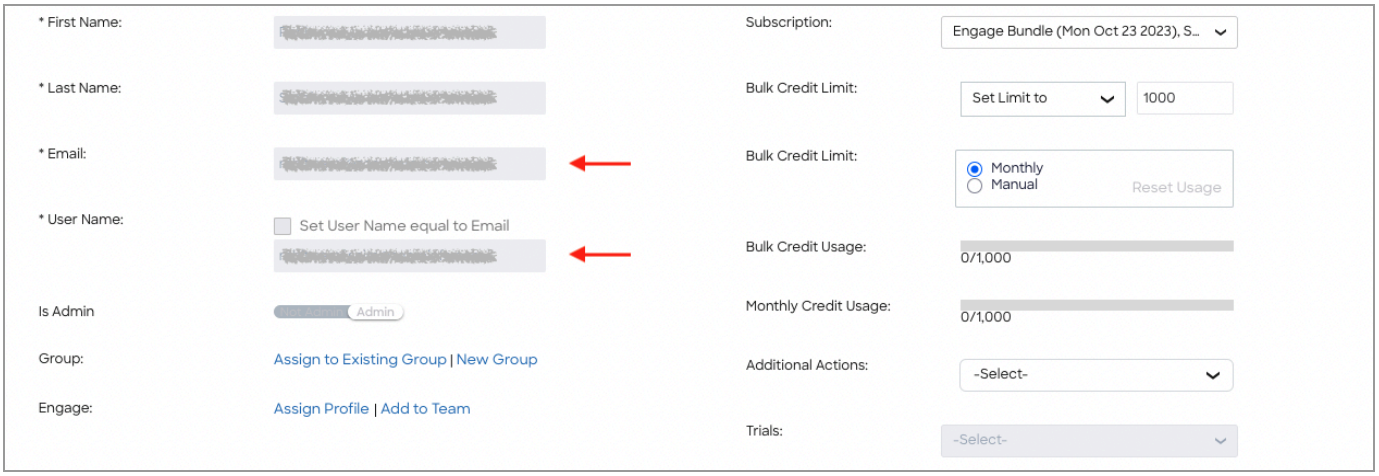
Note: These credit-related settings can be updated in the ZoomInfo Admin Portal, so they are set by default to **Create** in the Okta app.

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



User name and email address values in the ZoomInfo Admin Portal



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

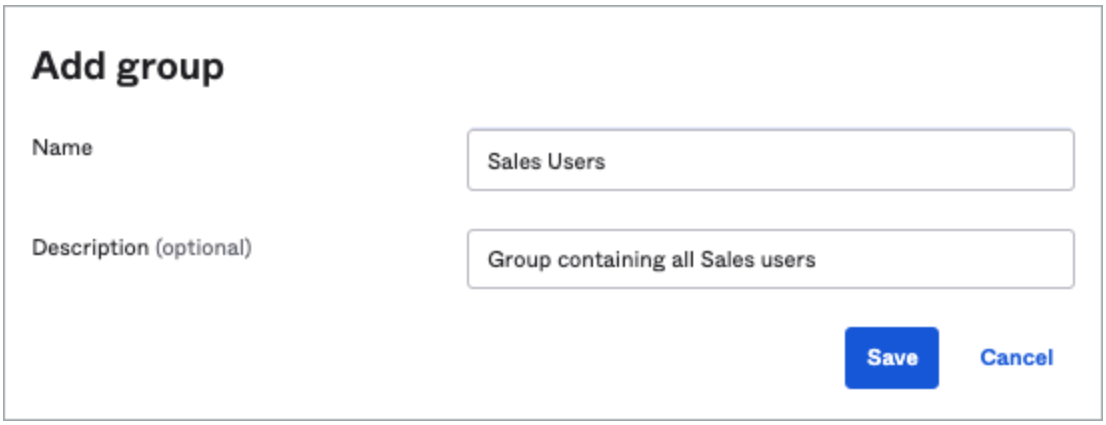
Smaller organizations can assign individuals (People) and choose the subscribed product(s).

Assign by Group(s)

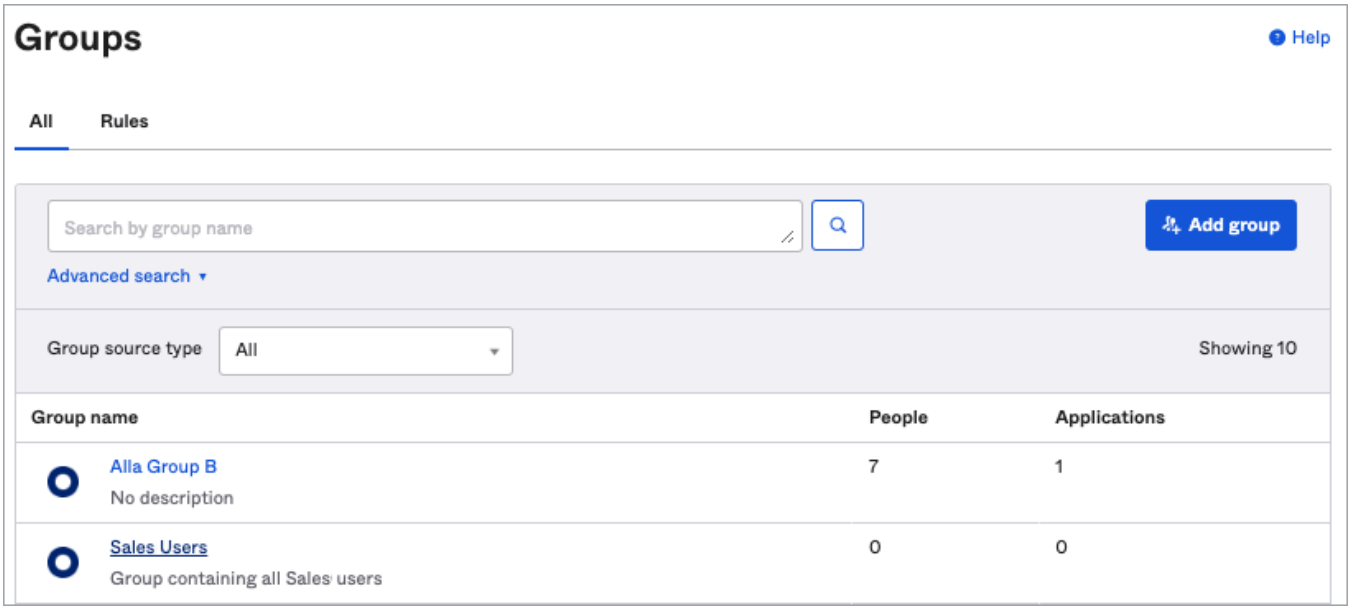
Assigning users to product(s) using groups is more appropriate for larger organizations. To create a group:

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

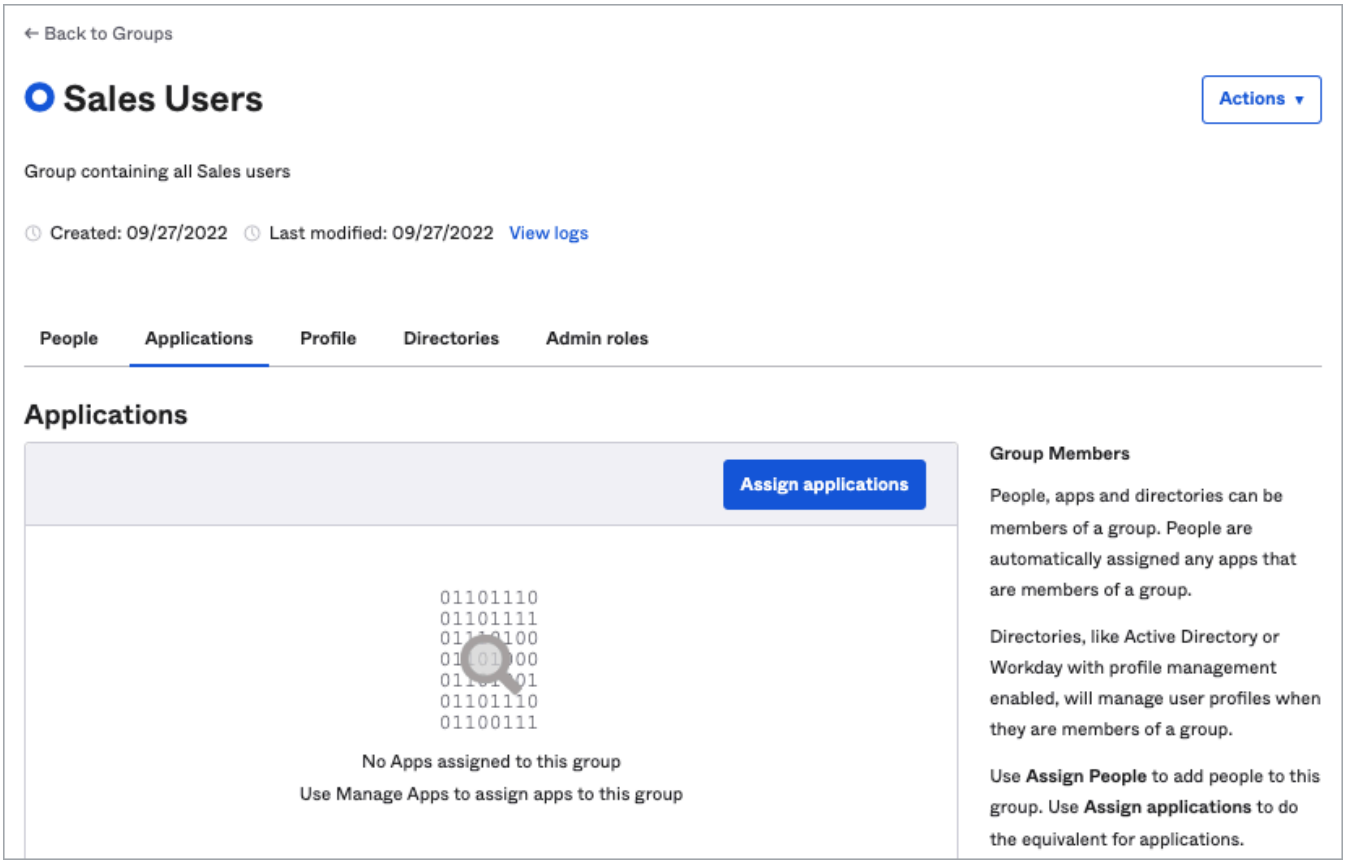
2. Click **Add group** and provide a name and optional description.



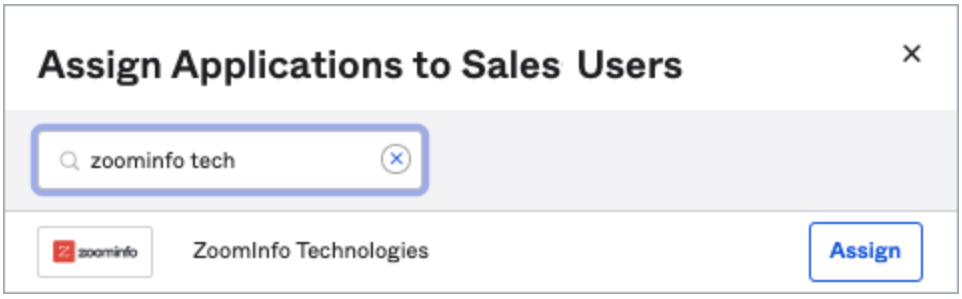
3. Click **Save**.
4. Click the group you just created (in this example, *Sales Users*).



5. Click the **Applications** tab.



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

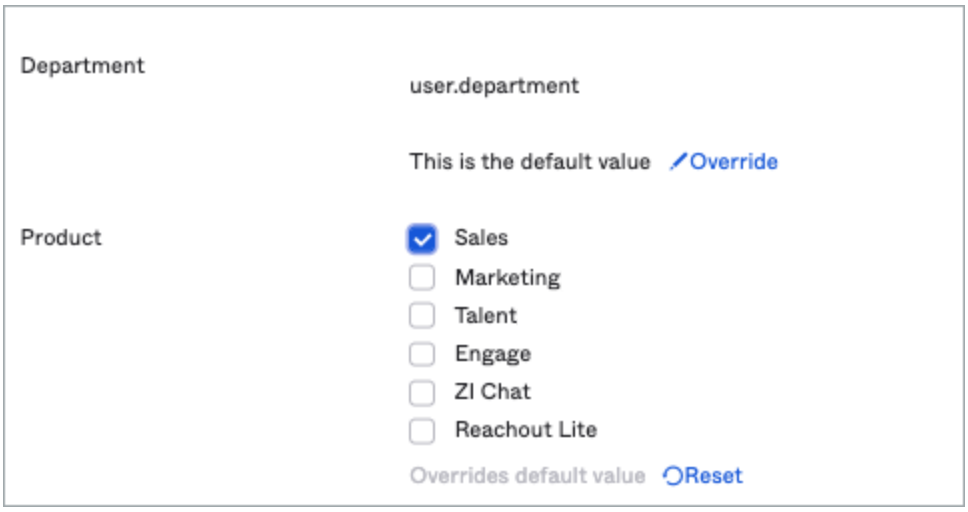


7. Click **Assign**.

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

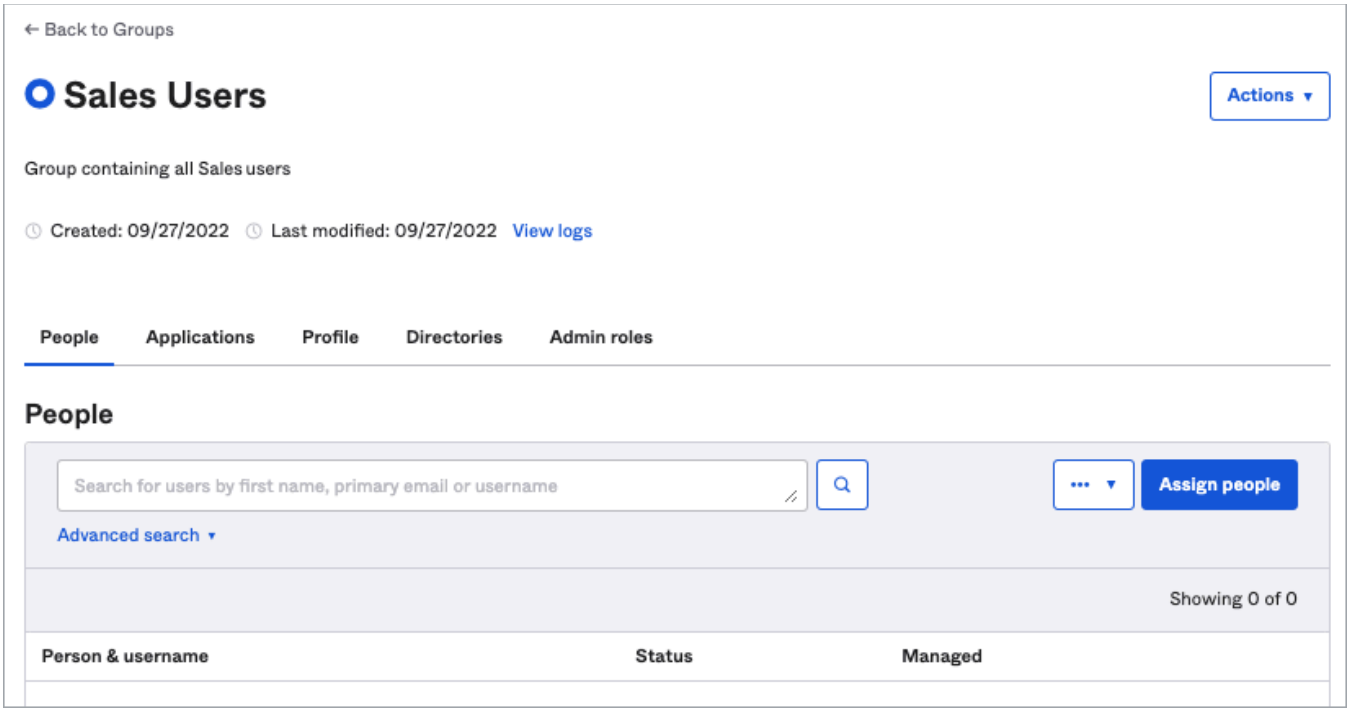
   Note: To see the list of subscribed ZoomInfo products for your organization, go to the **ZoomInfo Admin Portal** and select the **Admin Dashboard**. The list of packages is provided on the **Overview** tab.

   - 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.

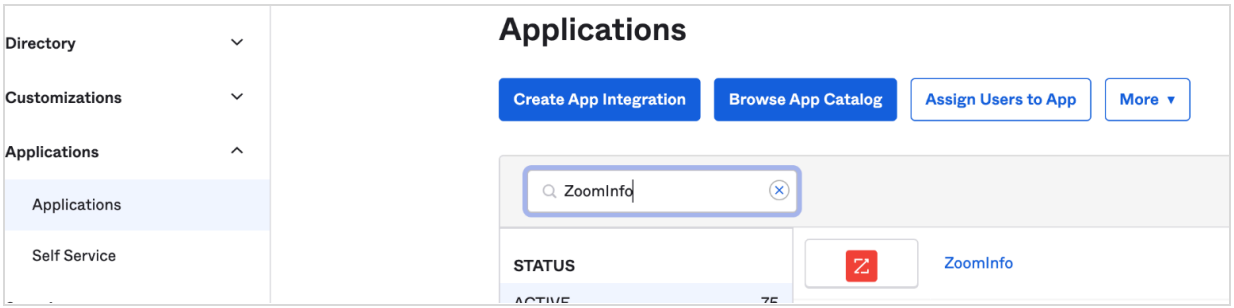


9. Click **Save and Go Back** and then click **Done**.

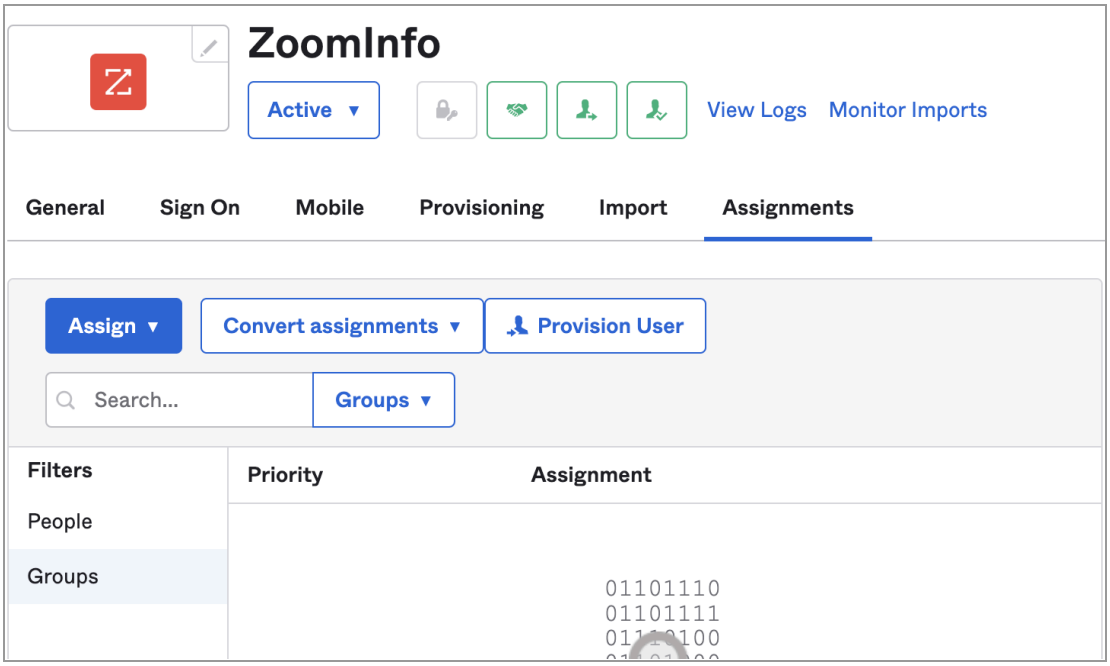
10. Click the **People** tab for the group.



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*.



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:

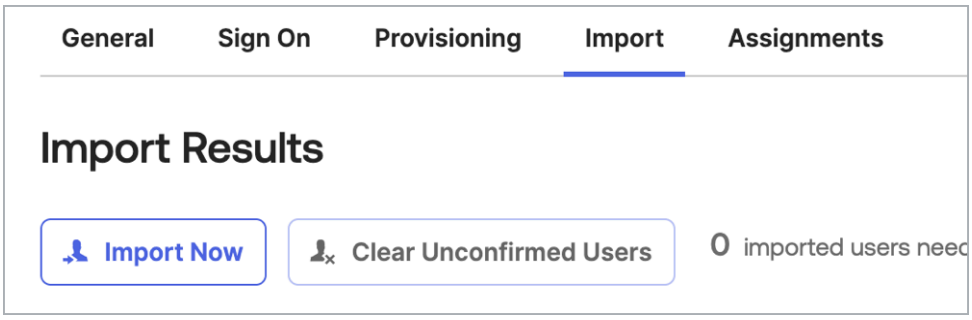
- **Groups**: The ZoomInfo Okta app does not support the import of groups. You can only import individual users into the Okta app. If using groups, you will need to assign these in the Okta app after the import is complete.
- **User Attributes**: The Okta app supports the import of the following People-type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

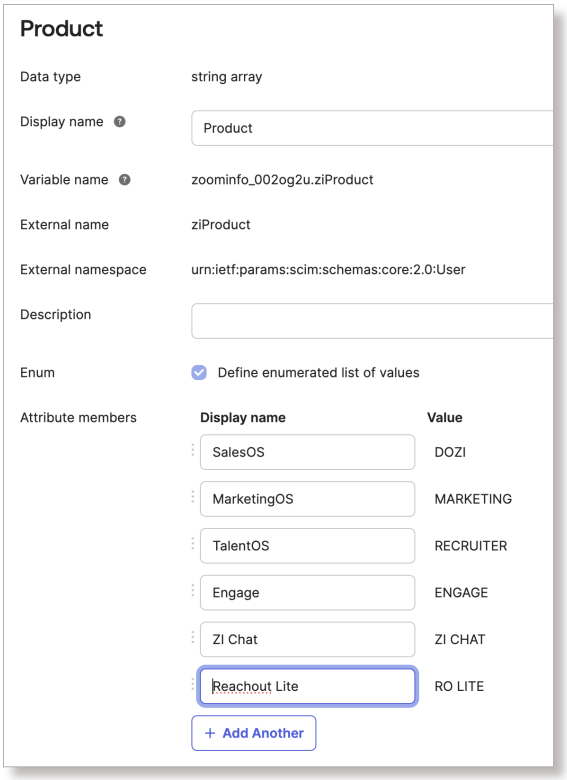
1. Go to **Admin Portal > User Management > Users > Auto Provisioning**.
2. Select the **IdP** tab.
3. Turn off the **Auto Provisioning User Management** toggle.
4. Go to **User Management > Single Sign On** and click **Reset All** in the upper right.

Add new products in the old version of Zoominfo app

The following products may not be found in the old version of the Zoominfo app. Here are the steps to add the products to the Zoominfo app:

1. Click **Provisioning**.
2. Scroll down, find and click **Go to Profile Editor**.
3. Edit **Product** attribute
4. Add new **Attribute members** by clicking **Add Another**.

Display Name	Value
Operations	OPERATIONSOS
Route	ROUTE
Advanced Activity Tracker	GTM STUDIO
Admin Only	ADMIN
Calendar Sync License	CALENDAR_SYNC
Email Sync License	EMAIL_SYNC
GTM Studio	STUDIO
Dev Portal	DEV PORTAL
GTM Workspace	GTM COPILOT
GTM One	STUDIOV2



5. Click the **Save Attribute** button.

Remove decommissioned products from the old version of Zoominfo app

Some products are not supported anymore in the old version of the Zoominfo app. Here are the steps to remove the products from the Zoominfo app:

1. Click the **Provisioning** tab.
2. Click **Go to Profile Editor**.
3. Edit **Product** attribute.
4. Click the **x** icon to remove the products from the list of products.

Display Name	Value
ZI Chat	ZI CHAT

5. Click the **Save Attribute** button.

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.