



SCIM Setup & Provisioning in Okta

Contents:

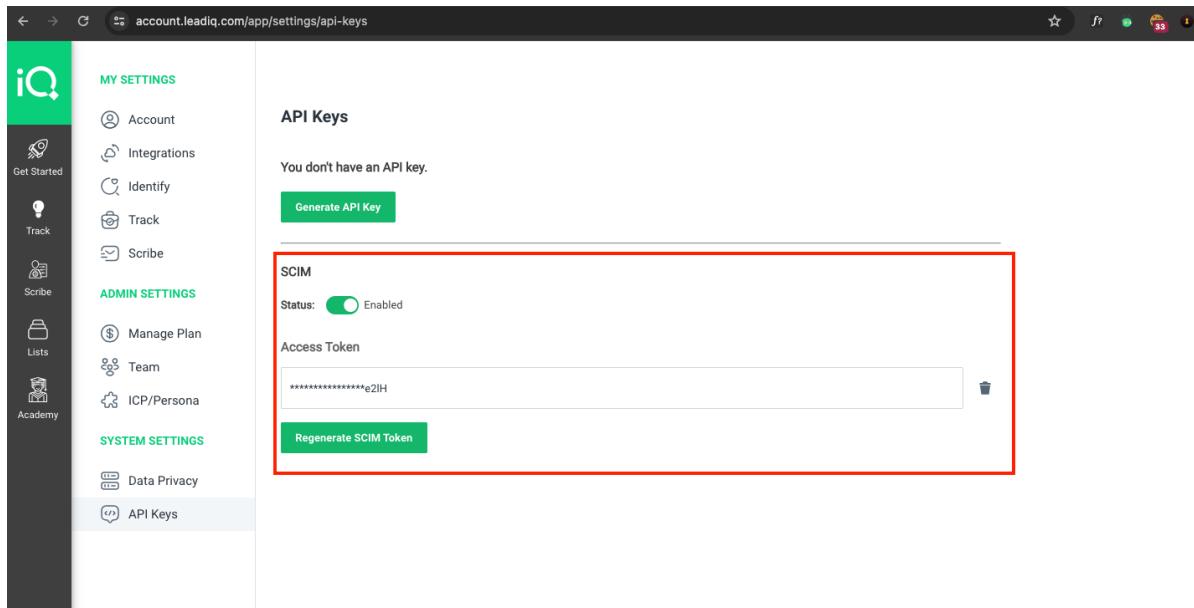
1. Setup
2. Provisioning users into the team
3. Unassigning a user from a team
4. Updating a user's first and last names
5. SCIM Groups

Setup:

1. Generate the SCIM API key for your team (section can be found in your LeadIQ Settings → API Keys).
 - a. Copy the API key
 - i. **⚠ Note:** Please ensure to copy the API key as we only display it once. Once you navigate away from the page, the API key will become

obscured as shown on the screenshot below.

b. Screenshot:



2. Navigate to the Okta Application

3. Copy and paste the generated SCIM API key into the Okta app

- a. Ensure that the `Enable SCIM Provisioning` option is checked under General tab (see 3b below for reference).
- b. Paste the generated SCIM API key into the Okta Application. The field can be found on the Provisioning → Integration page
 - i. SCIM connector base URL: <https://provisioning.leadiq.com/scim/v2>
 - ii. unique Identifier: `userName`
- c. Screenshots:

Internal Document SCIM

General **Sign On** **Mobile** **Provisioning** **Import** **Assignments** **Push Groups**

App Settings

Application label: Internal Document SCIM

Application visibility: Do not display application icon to users Do not display application icon in the Okta Mobile app

Provisioning: Enable SCIM provisioning

Auto-launch: Auto-launch the app when user signs into Okta.

Application notes for end users

Application notes for admins

SAML Settings

Internal Document SCIM

General **Sign On** **Mobile** **Provisioning** **Import** **Assignments** **Push Groups**

Integration

SCIM Connection

SCIM version: 2.0

SCIM connector base URL: https://provisioning.leadiq.com/scim/v2

Unique identifier field for users: username

Supported provisioning actions:

- Import New Users and Profile Updates
- Push New Users
- Push Profile Updates
- Push Groups
- Import Groups

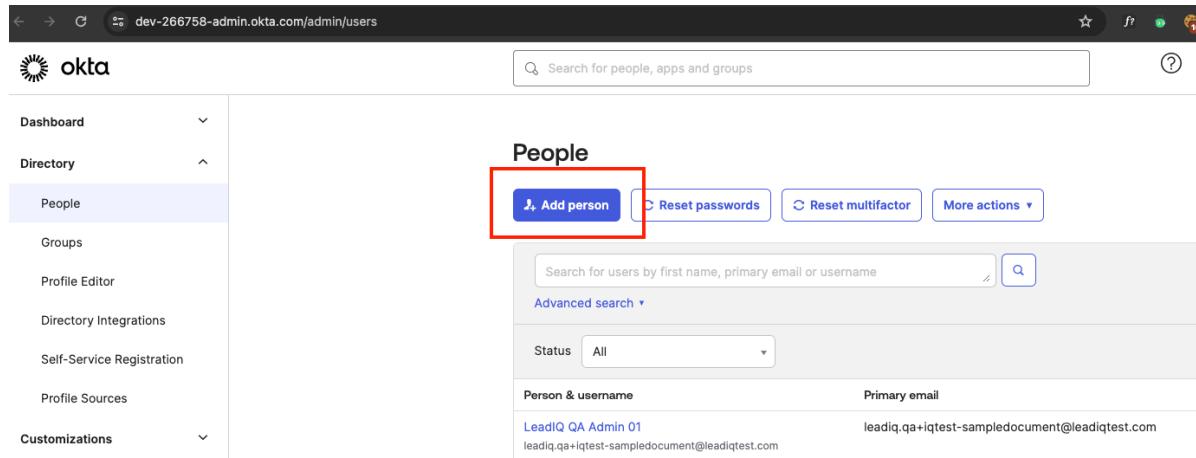
Authentication Mode: HTTP Header

HTTP Header

Authorization: Bearer

4. Create the LeadIQ Admin's account on Okta (if the team admin does not have an account on Okta).

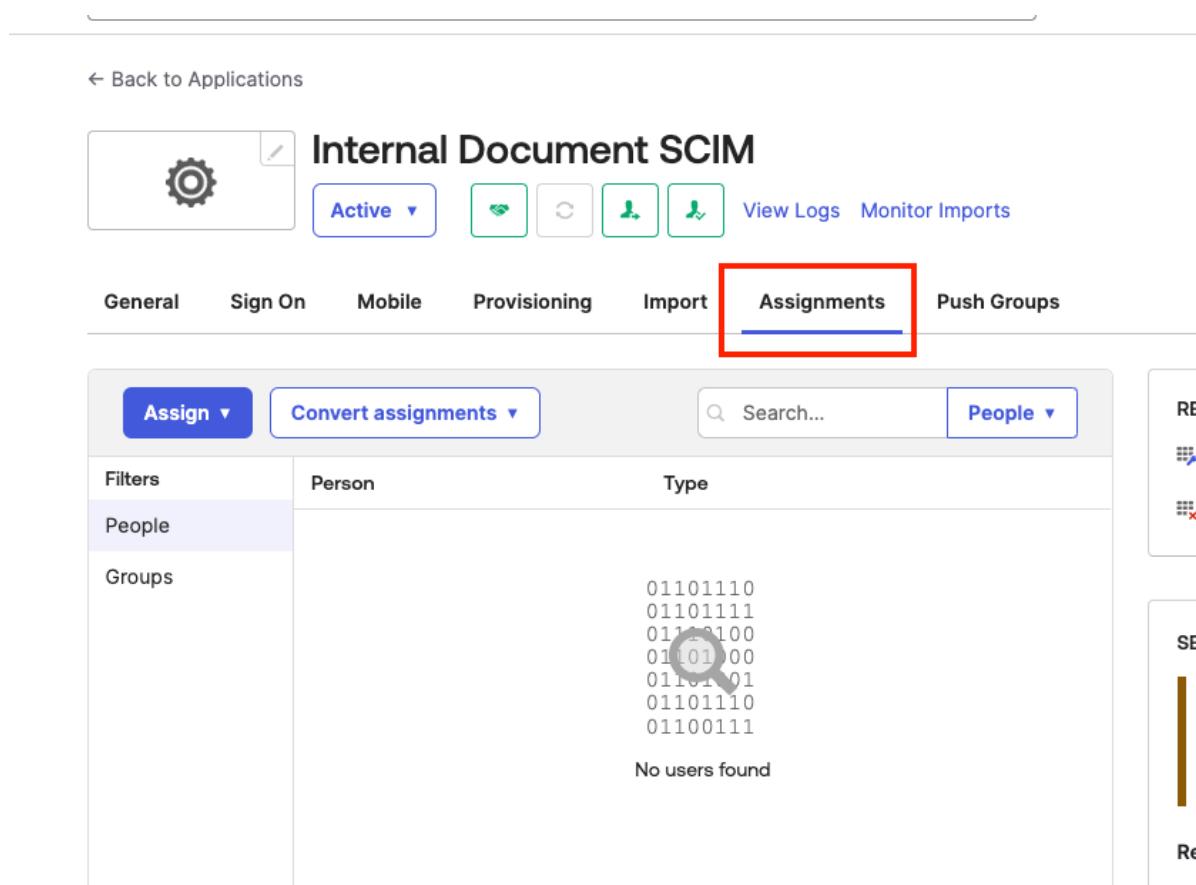
a. Screenshots:



The screenshot shows the Okta Admin Console with the URL <https://dev-266758-admin.okta.com/admin/users>. The left sidebar is open, showing 'People' selected under 'Directory'. The main area is titled 'People' and contains a 'Search for people, apps and groups' bar. Below it are buttons for 'Add person' (highlighted with a red box), 'Reset passwords', 'Reset multifactor', and 'More actions'. A search bar and an 'Advanced search' dropdown are also present. The table below lists a single user: 'LeadIQ QA Admin 01' with the primary email 'leadiq.qa+iqtest-sampledocument@leadiqtest.com'.

5. After user creation, navigate back to Applications → Applications and select the LeadIQ app. Afterwards, navigate to the Assignments tab.

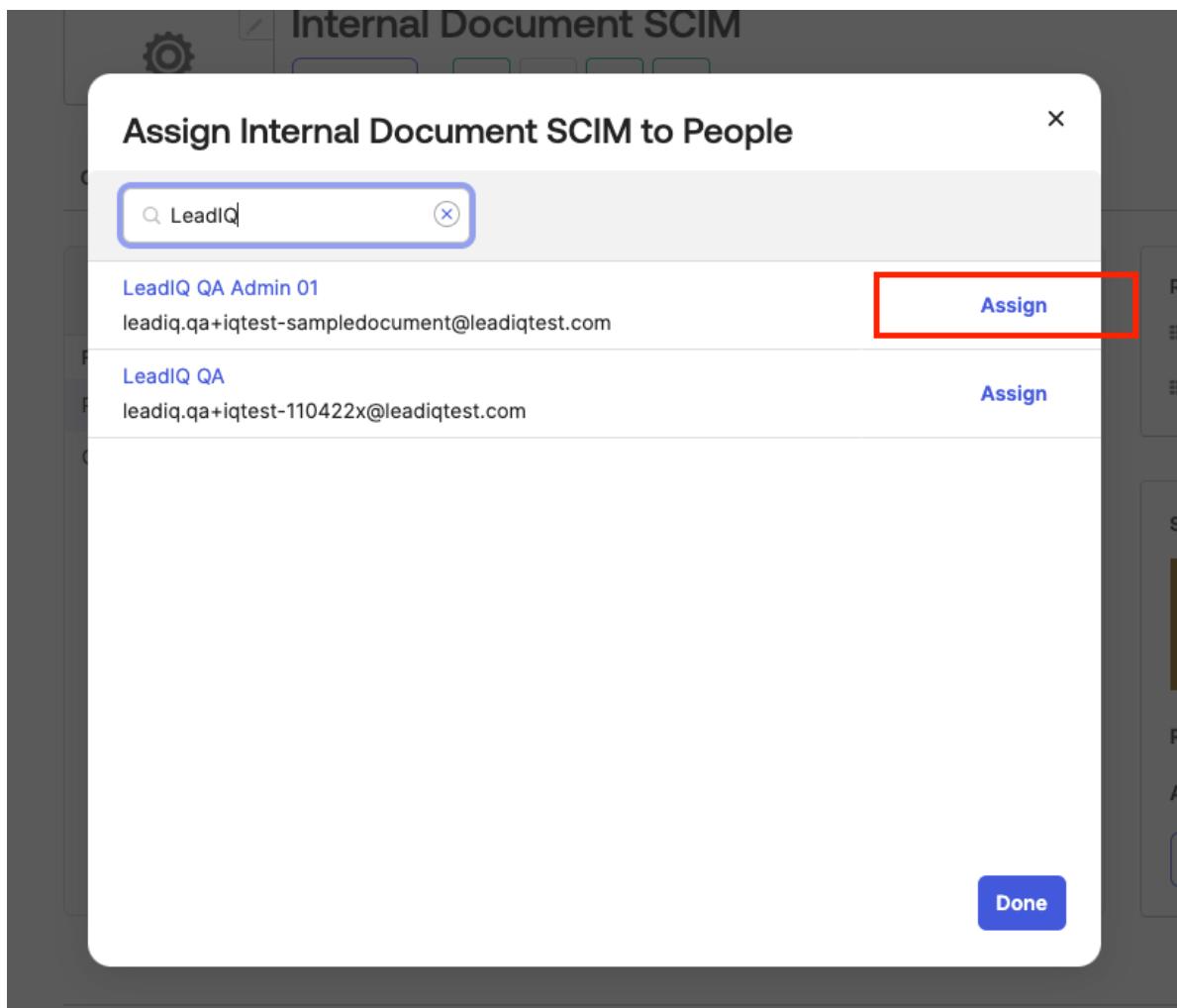
a. Screenshot:



The screenshot shows the Internal Document SCIM interface. At the top, there is a 'Back to Applications' link and a card for 'Internal Document SCIM' with icons for 'Active', 'Sync', 'Users', and 'Groups', along with 'View Logs' and 'Monitor Imports' buttons. Below this, a navigation bar includes 'General', 'Sign On', 'Mobile', 'Provisioning', 'Import', 'Assignments' (highlighted with a red box), and 'Push Groups'. The 'Assignments' tab is active, showing a table with columns 'Filters', 'Person', and 'Type'. The 'Filters' section is set to 'People'. The 'Person' column shows a list of users: '01101110', '01101111', '01101100', '01101000', '0110101', '01101110', and '01100111'. The 'Type' column shows a magnifying glass icon over the first four entries. A search bar and a 'People' dropdown are at the top of the table. On the right, there are sidebar sections for 'RE', 'SE', and 'Re' with corresponding icons.

6. Click the Assign button and select Assign to People. Locate the created account from step #4, and click Assign. Click the Save and Go Back button, and then lastly, click the Done button.

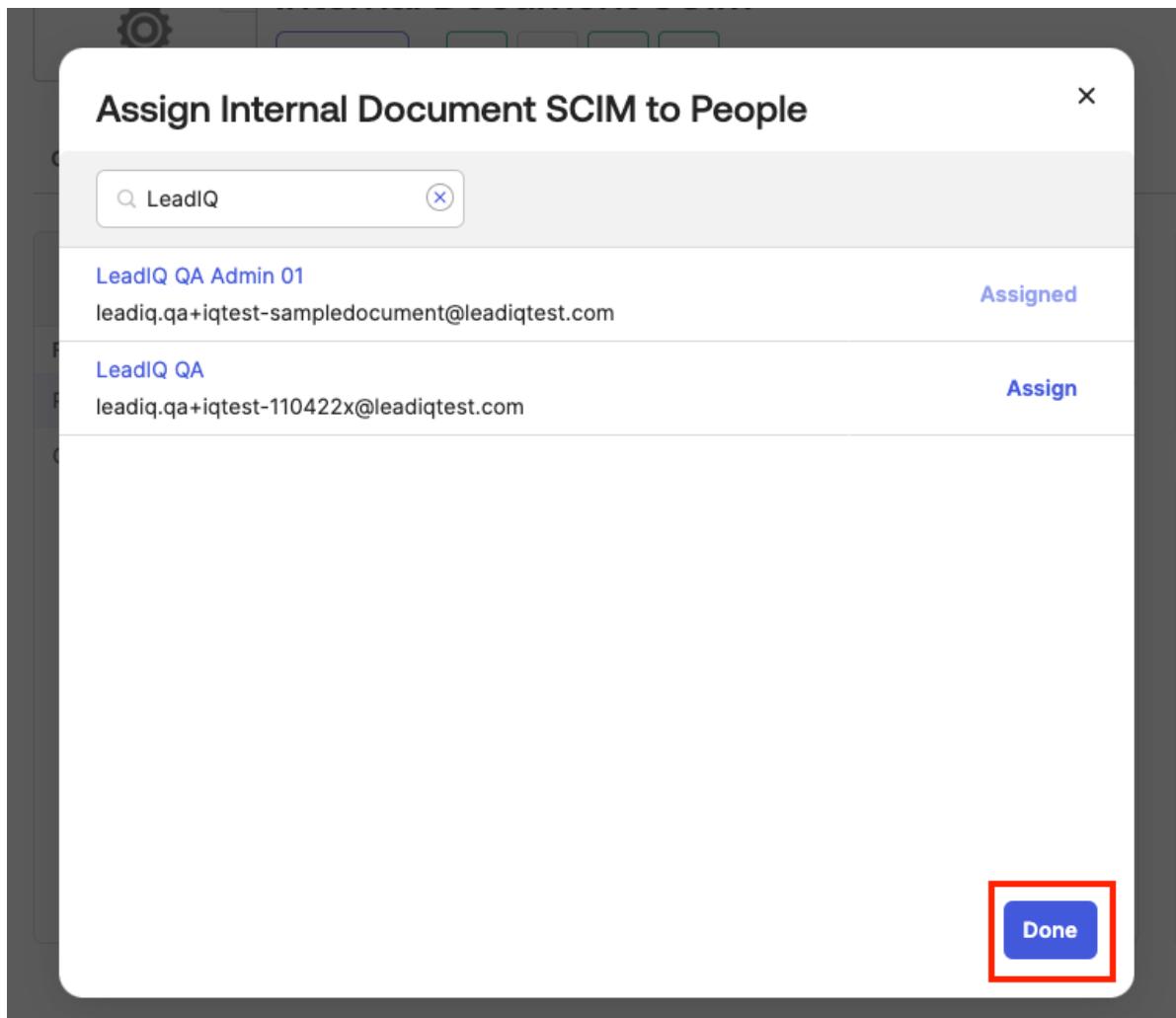
a. Screenshots:



Postal Code	<input type="text"/>
Country	<input type="text"/>
Formatted	<input type="text"/>
Employee number	<input type="text"/>
Manager value	<input type="text"/>
Manager display name	<input type="text"/>
Preferred language	<input type="text"/>
Locale Name	<input type="text" value="en_US"/>
Time zone	<input type="text"/>
User type	<input type="text"/>
Cost center	<input type="text"/>
Organization	<input type="text"/>
Division	<input type="text"/>
Department	<input type="text"/>

Save and Go Back

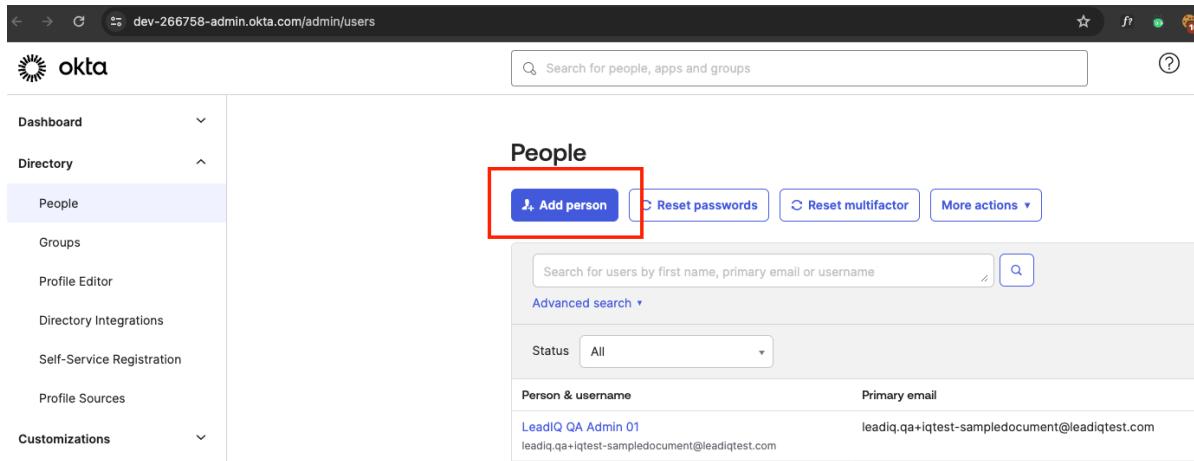
Cancel



Provisioning users into the team

This section includes steps on provisioning users into a team via the SCIM app. Users' accounts will be automatically created and added into the team which the SCIM app is authorized with.

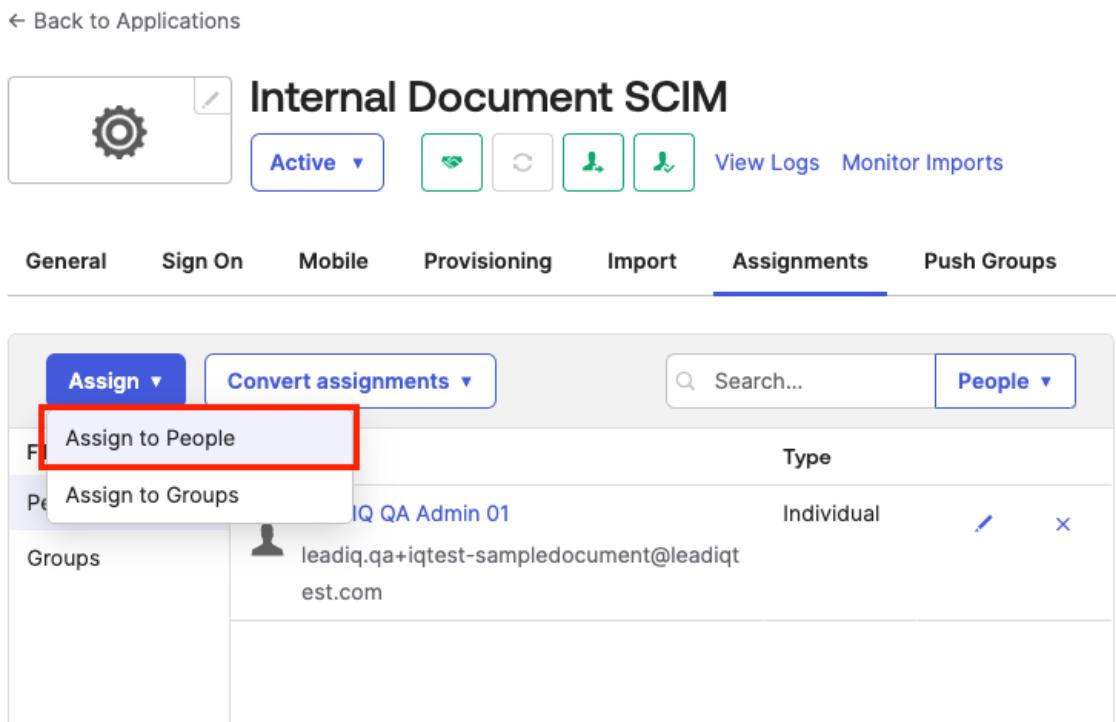
1. Create the user account that is to be provisioned on Okta (if the user does not already exist)
 - a. Screenshot:



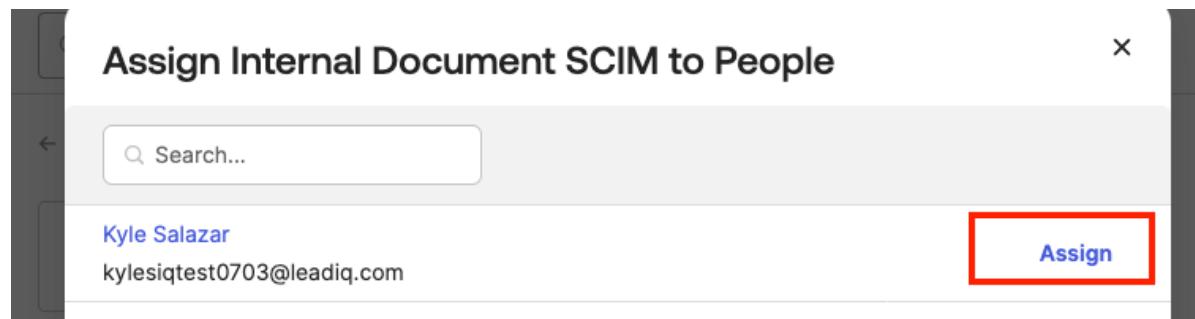
The screenshot shows the Okta Admin Console with the URL <https://dev-266758-admin.okta.com/admin/users>. The left sidebar is titled 'Directory' and includes 'People' (which is selected and highlighted in blue), 'Groups', 'Profile Editor', 'Directory Integrations', 'Self-Service Registration', 'Profile Sources', and 'Customizations'. The main area is titled 'People' and shows a list of users. At the top right of this area, there are buttons for 'Add person' (which is highlighted with a red box), 'Reset passwords', 'Reset multifactor', and 'More actions'. Below these buttons is a search bar with the placeholder 'Search for users by first name, primary email or username' and a magnifying glass icon. Underneath the search bar are filters for 'Status' (set to 'All') and 'Person & username' (showing 'LeadIQ QA Admin 01'). To the right of these filters is a 'Primary email' column showing 'leadiq.qa+iqtest-sampledocument@leadiqtest.com'. At the bottom of the list, there is a note: 'LeadIQ QA Admin 01 leadiq.qa+iqtest-sampledocument@leadiqtest.com'.

2. After creating the user's account, assign the account to the app by navigating to Applications → Applications and select the existing app. Click the Assignments tab and click the Assign button. Locate and assign the user and save all changes.

a. Screenshots:



The screenshot shows the 'Internal Document SCIM' application. At the top, there is a navigation bar with a gear icon, a 'Back to Applications' link, and the application title 'Internal Document SCIM'. Below the title are buttons for 'Active' (with a dropdown arrow), 'View Logs', and 'Monitor Imports'. The main navigation bar includes tabs for 'General', 'Sign On', 'Mobile', 'Provisioning', 'Import', 'Assignments' (which is highlighted with a blue underline), and 'Push Groups'. Below this is a search bar with a magnifying glass icon and a dropdown menu labeled 'People'. The main content area shows a table with two rows. The first row has a 'Groups' column with a dropdown menu containing 'Assign to People' (which is highlighted with a red box) and 'Assign to Groups'. The second row shows a user entry: 'IQ QA Admin 01' (with a person icon), 'leadiq.qa+iqtest-sampledocument@leadiqtest.com', and 'Individual' under the 'Type' column. There are edit and delete icons to the right of this row.



Postal Code	<input type="text"/>
Country	<input type="text"/>
Formatted	<input type="text"/>
Employee number	<input type="text"/>
Manager value	<input type="text"/>
Manager display name	<input type="text"/>
Preferred language	<input type="text"/>
Locale Name	en_US
Time zone	<input type="text"/>
User type	<input type="text"/>
Cost center	<input type="text"/>
Organization	<input type="text"/>
Division	<input type="text"/>
Department	<input type="text"/>

Save and Go Back

Cancel

Assign Internal Document SCIM to People

x

kyle



[Kyle Salazar](#)

kyles@leadiq.com

Assigned

[Kyle Salazar](#)

kylesiqtest0703@leadiq.com

Assign

[Done](#)

← Back to Applications

Internal Document SCIM

Active     View Logs Monitor Imports

General Sign On Mobile Provisioning Import Assignments Push Groups

Assign 	Convert assignments 	Search... 	People 
Filters	Person	Type	
People	LeadIQ QA Admin 01  leadiq.qa+iqtest-sampledocument@leadiqtest.com	Individual  	
Groups	Kyle Salazar  kylesiqtest0703@leadiq.com	Individual  	

3. After the user has been assigned to the app, the user should now be automatically provisioned into the team. The user can now use "Login with SSO" to log into the account.

a. Screenshot:

account.leadiq.com/app/team/members/

MY SETTINGS

- Get Started
- Track
- Scribe
- Lists
- Academy

Team

Users Groups & Governance Settings Reports

Manage the settings for each group with **Group Governance** [Learn more about group governance](#) 

+ Invite Your team has 2 members, you can add 3 more.

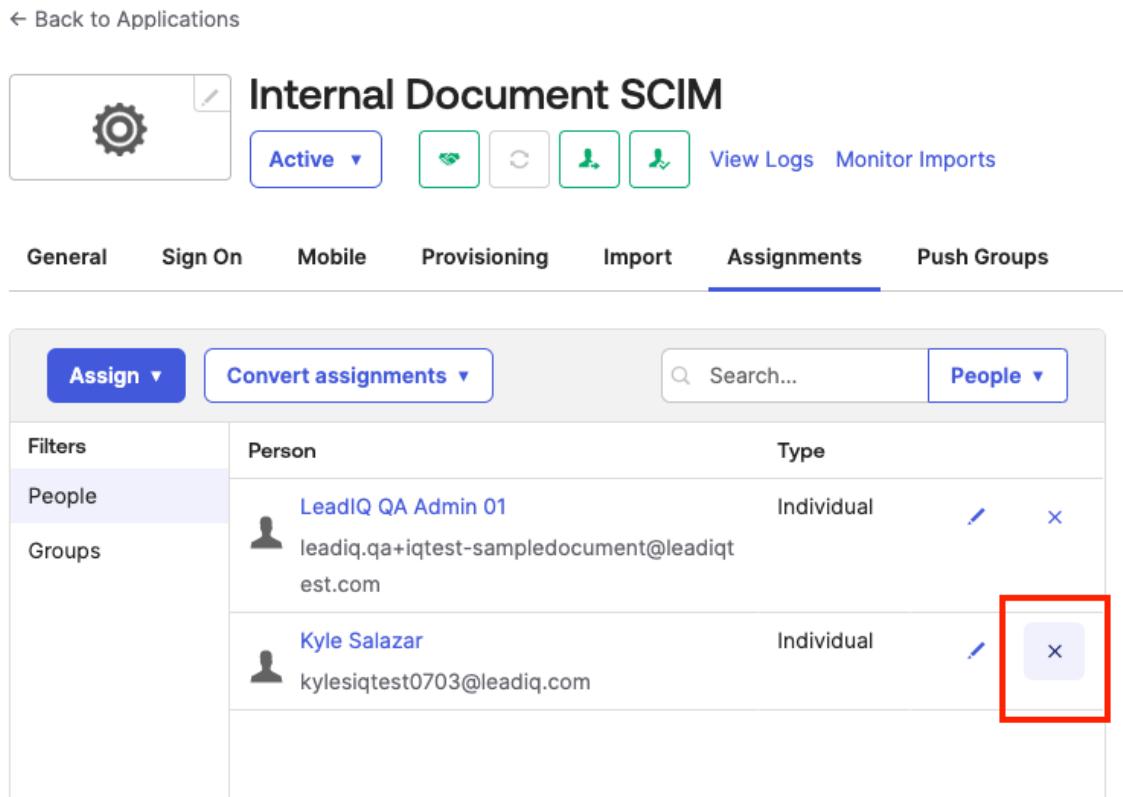
NAME	EMAIL	GROUP	MANAGING GROUPS	INTEGRATIONS	STANDARD CREDITS	PREMIUM CREDITS
Kyle Salazar	kylesiqtest0703@leadiq.com				0 / 500	0 / 30
LeadIQ QA Admin 01	leadiq.qa+iqtest-sampledocument@leadiqtest.com				0 / 500	0 / 30

Unassigning a user from the team

This section includes steps on unassigning a user from a team. Unassigning a user will make the user go into an `inactive` state wherein logins will be blocked but captured leads and account settings are retained.

1. Navigate to Applications → Applications and then select the existing app. Click on the Assignments tab and click the x icon for the user that will be unassigned from the team.

- a. Screenshot:

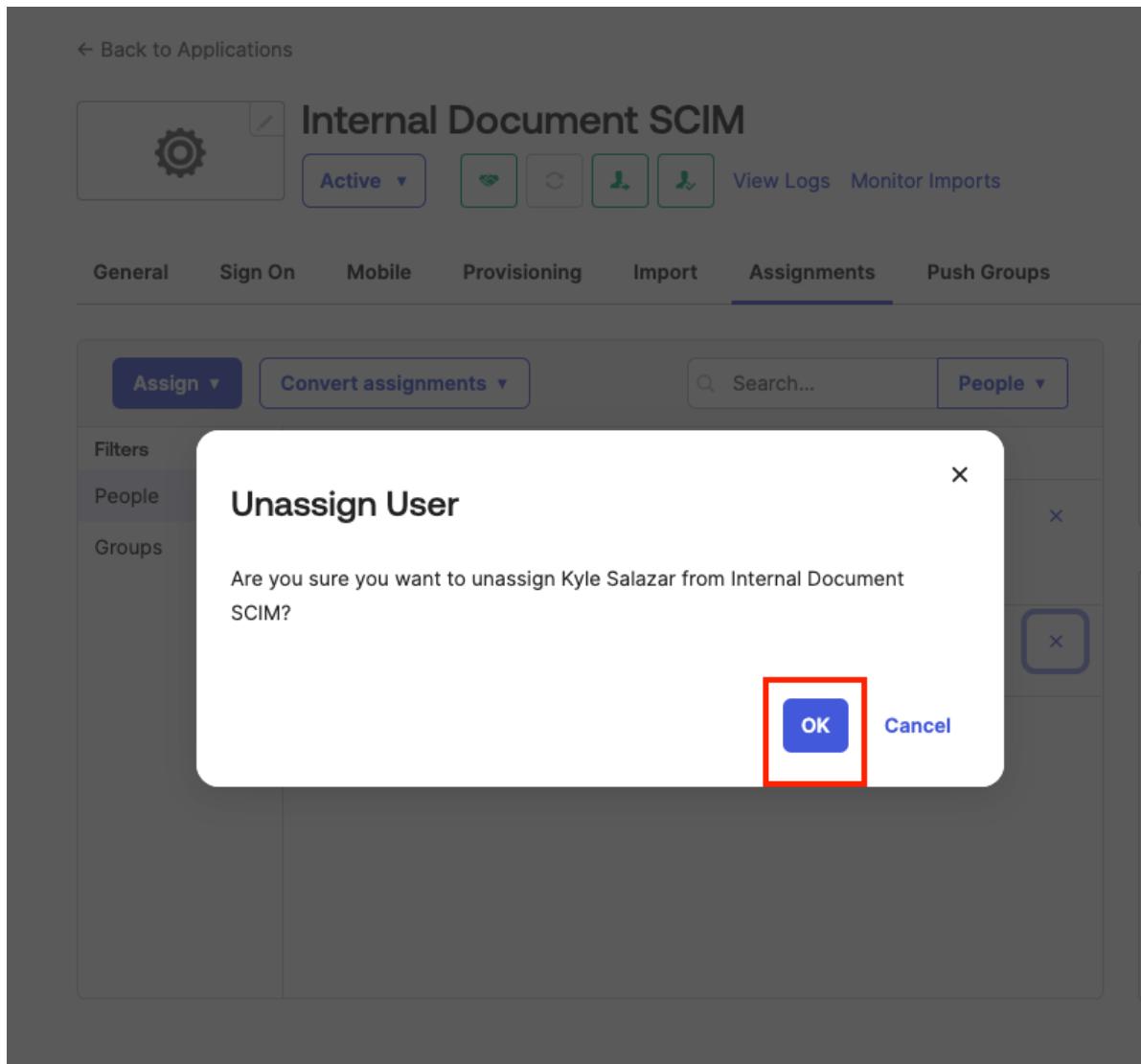


The screenshot shows the 'Internal Document SCIM' application interface. The 'Assignments' tab is selected. The main table lists users assigned to the application. The first user, 'LeadIQ QA Admin 01', has an 'x' icon in the 'Actions' column, which is highlighted with a red box. The second user, 'Kyle Salazar', also has an 'x' icon in the 'Actions' column.

Filters	Person	Type	Actions
People	LeadIQ QA Admin 01 leadiq.qa+iqtest-sampledocument@leadiqtest.com	Individual	 
Groups	Kyle Salazar kylesiqtest0703@leadiq.com	Individual	 

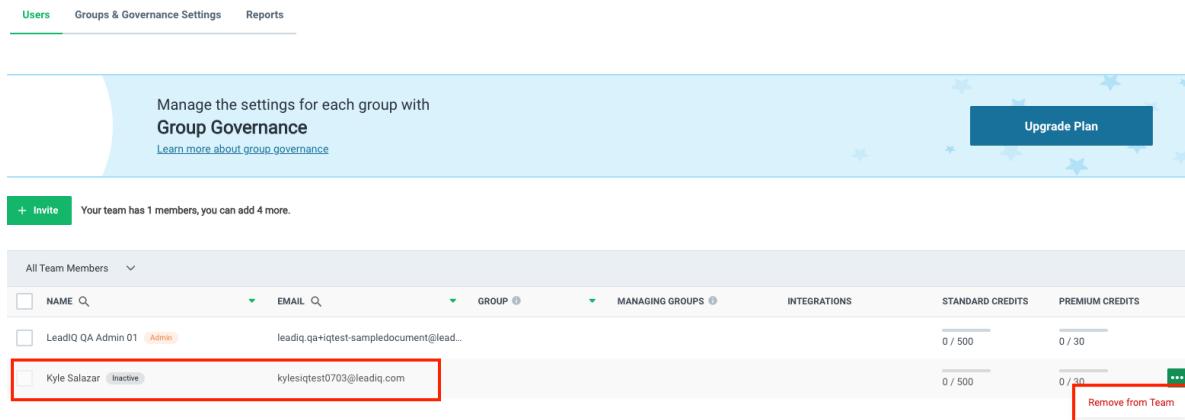
2. Click on the x icon and click OK to proceed with the unassignment.

- a. Screenshot:



3. Once a user has been unassigned from a team via Okta, the user will be tagged as **Inactive** in LeadIQ and will no longer be allowed to login regardless of login type (i.e. sign in with Google, email & password, SSO, Microsoft).
 - a. The user's leads will still remain accessible to other team admins and the user's settings will still be intact.
 - b. Only the 'Remove from Team' option will be available for team admins when hovering on inactive users on the 'Team' page in LeadIQ
 - c. Inactive users will not count towards a team's occupied seats when it comes to plan licenses.
 - d. Screenshot:

Team



Manage the settings for each group with **Group Governance**
[Learn more about group governance](#)

+ Invite Your team has 1 members, you can add 4 more.

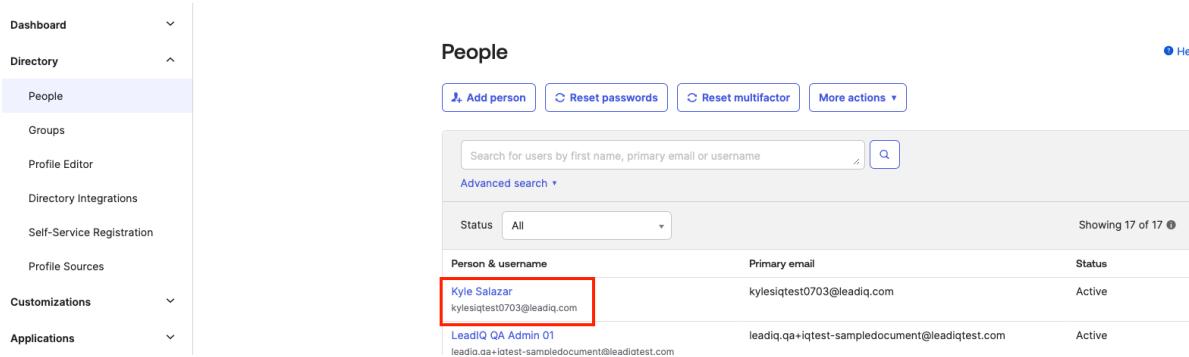
All Team Members	NAME	EMAIL	GROUP	MANAGING GROUPS	INTEGRATIONS	STANDARD CREDITS	PREMIUM CREDITS
<input type="checkbox"/> LeadIQ QA Admin 01 <small>Admin</small>	leadiq.qa+qtest-sampleddocument@lead...				0 / 500	0 / 30	
<input type="checkbox"/> Kyle Salazar <small>Inactive</small>	kylesiqtest0703@leadiq.com				0 / 500	0 / 30	

[Remove from Team](#)

Updating a user's first and last names

A user's first and last names on LeadIQ can be updated by simply updating the user's names on Okta. As of writing, only these two fields can be updated.

1. Go to Okta, and navigate to Directory → People
2. Select the user to be updated
 - a. Screenshot:



Dashboard

Directory

People

Groups

Profile Editor

Directory Integrations

Self-Service Registration

Profile Sources

Customizations

Applications

People

Add person

Reset passwords

Reset multifactor

More actions

Search for users by first name, primary email or username

Advanced search

Status All Showing 17 of 17

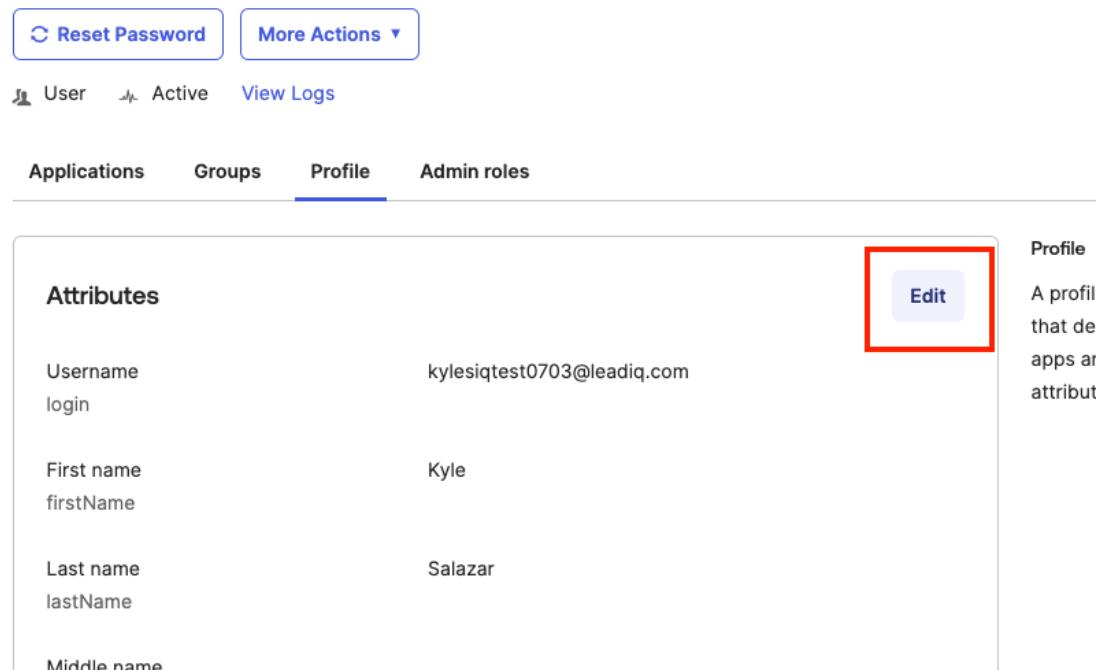
Person & username	Primary email	Status
Kyle Salazar kylesiqtest0703@leadiq.com	kylesiqtest0703@leadiq.com	Active
LeadIQ QA Admin 01 leadiq.qa+qtest-sampleddocument@leadiqtest.com	leadiq.qa+qtest-sampleddocument@leadiqtest.com	Active

3. Navigate to the Profile tab and click Edit

- a. Screenshot:

Kyle Salazar

kylesiqtest0703@leadiq.com



The screenshot shows the Okta Profile page for a user named Kyle Salazar. At the top, there are buttons for 'Reset Password' and 'More Actions'. Below that, there are links for 'User', 'Active', and 'View Logs'. A navigation bar at the bottom includes 'Applications', 'Groups', 'Profile' (which is underlined in blue), and 'Admin roles'. The main content area is titled 'Attributes' and lists the following data:

Attribute	Value
Username	kylesiqtest0703@leadiq.com
login	
First name	Kyle
firstName	
Last name	Salazar
lastName	
Middle name	

On the right side of the attributes table, there is a blue 'Edit' button with a red rectangular box drawn around it. To the right of the attributes table, there is a vertical sidebar with the title 'Profile' and the text 'A profil that de apps ar attribut'.

4. Update either the user's first or last name, or update both names and save the changes.

- a. Screenshot:

Kyle Kjell Salazar II

kylesiqtest0703@leadiq.com

[Reset Password](#) [More Actions ▾](#)

 User  Active [View Logs](#)

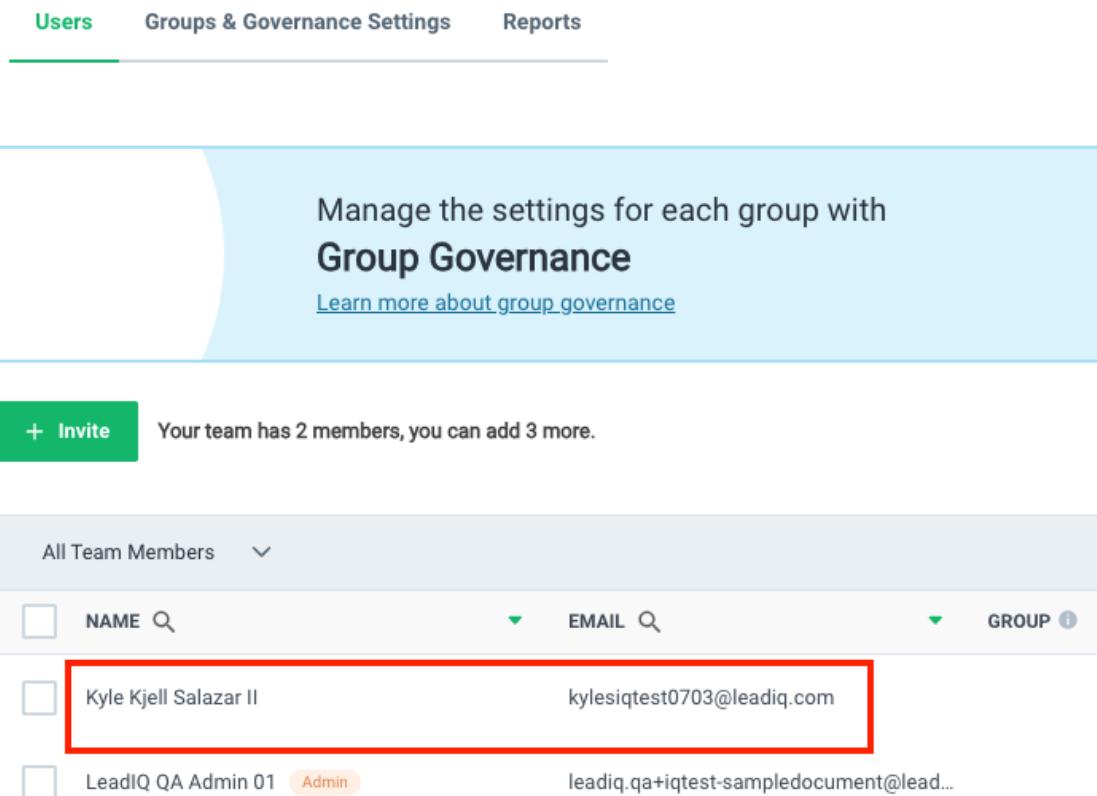
[Applications](#) [Groups](#) [Profile](#) [Admin roles](#)

Attributes		Edit
Username login	kylesiqtest0703@leadiq.com	
First name firstName	Kyle Kjell	
Last name lastName	Salazar II	

5. The user's name on LeadIQ web app will now be updated as well

a. Screenshot:

Team



The screenshot shows the 'Team' section of the Okta Admin Console. At the top, there are three tabs: 'Users' (highlighted in green), 'Groups & Governance Settings', and 'Reports'. Below the tabs, a large blue callout box contains the text: 'Manage the settings for each group with Group Governance' and a link to 'Learn more about group governance'. Below the callout, there is a green button labeled '+ Invite' and a message stating 'Your team has 2 members, you can add 3 more.' The main list area is titled 'All Team Members' and includes columns for 'NAME' and 'EMAIL'. Two user entries are listed: 'Kyle Kjell Salazar II' (email: kylesiqtest0703@leadiq.com) and 'LeadiQ QA Admin 01' (email: leadiq.qa+iqtest-sampledocument@lead...). The entry for 'Kyle Kjell Salazar II' is highlighted with a red box.

NAME	EMAIL
Kyle Kjell Salazar II	kylesiqtest0703@leadiq.com
LeadiQ QA Admin 01	leadiq.qa+iqtest-sampledocument@lead...

Errors

Error: "Automatic provisioning of user John Doe to app LeadIQ failed: Matching user not found."

Solution:

1. Go to Okta Admin Console and navigate to Applications > LeadIQ > Provisioning > To App
2. Click Edit. Select the Provisioning Feature "Create Users" (this allows Okta to create user accounts in LeadIQ). Click Save.

3. Do the same for "Update User Attributes" and "Deactivate Users" if you haven't already done so. Click Save.
4. Afterward, attempt the user provisioning again. Navigate to Dashboard > Tasks. Any failed assignments should appear under Tasks.

The screenshot shows the Okta dashboard with the sidebar open. The 'Tasks' link in the sidebar is highlighted with a red arrow and the number '1'. On the right, the 'Tasks' page is displayed with a list of tasks. One task is shown as failed, indicated by a red arrow and the number '2' pointing to the task card. The task card contains the message: 'Application assignments encountered errors' and 'Review and correct these errors to complete these app assignments.'

1. After identifying the failed task for the user that should be retried, click on Retry Selected

SCIM Groups

At a high level, this allows the user to do the following on Okta which will then be reflected on the user's LeadIQ groups, given that the groups are linked:

1. Create a group
 - a. A group created and pushed from Okta will create a corresponding LeadIQ group.
2. Link an Okta group to an existing LeadIQ group
 - a. An Okta group can be linked to an existing LeadIQ group so that group assignments can be easily managed through Okta.
3. Update a group's name

- a. Updating a linked group on Okta will update the linked LeadIQ group's name.

4. Assign a team member to a group
 - a. Assigning a team member to an Okta group will assign the same member to the corresponding linked LeadIQ group.
5. Unassign a team member from a group
 - a. Removing a team member from an Okta group will also unassign the same member from the corresponding linked LeadIQ group and move them back to the default group.
6. Unlink a group
 - a. Unlinking an Okta group has two possible results based on user's preference. One is they can delete the linked LeadIQ group along with the pushed Okta group, or retain it and just delete the pushed Okta group. Selecting the latter will preserve the state of the LeadIQ group and its group assignments.

Pre-conditions:

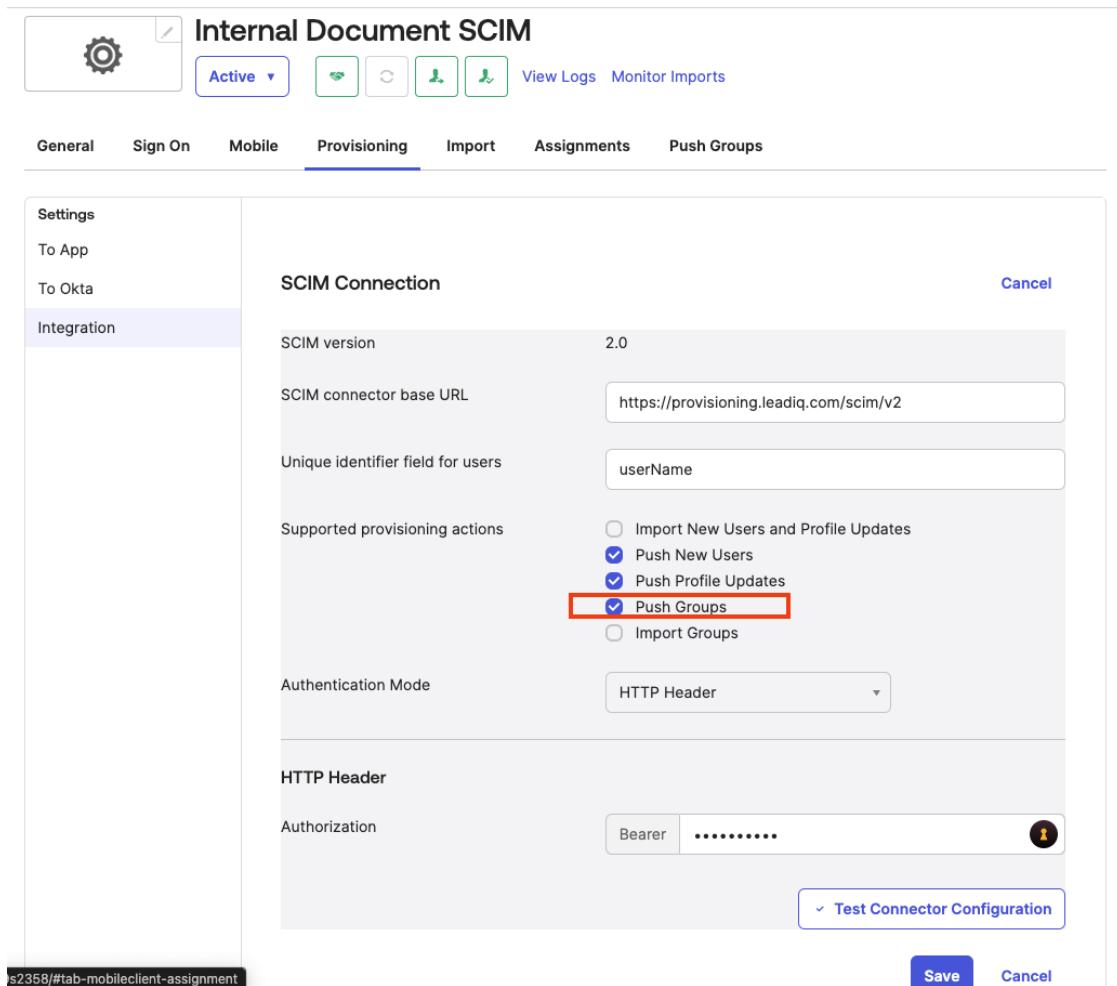
1. Access to Okta with:
 - a. permission to create, update, and push groups and group assignments
 - b. permission to edit applications
2. A LeadIQ team that will be used for provisioning
3. The SCIM app on Okta
4. Existing team has SCIM enabled and has a valid SCIM Token

Setup

The assumption in this document is that SCIM has already been previously set up for your team.

1. On Okta, navigate to the application and under the Provisioning tab, enable the **Push Groups** setting:

- a. Screenshot:



This is all that is needed to be additionally set up for group management.

Creating and pushing a group:

This section includes creating an Okta group and pushing the group to be created on LeadIQ.

1. Create the group to be pushed to LeadIQ:

- a. Screenshot:

The screenshot shows the Okta Groups page. On the left, there is a navigation sidebar with options like Dashboard, Directory, People, Groups (which is selected and highlighted in blue), Profile Editor, Directory Integrations, Self-Service Registration, Profile Sources, and Customizations. The main content area is titled 'Groups' and shows a table with one row. The row contains the group name '[Deals] Speed Corp.', a small icon, and two columns for 'People' and 'Applications', both showing a value of 0. At the top of the main area, there is a search bar and a blue button labeled 'Add group' with a plus sign icon, which is highlighted with a red box.

2. Once the Okta group has been created, navigate to the application page and under the **Push Groups** tab, click **Push Groups** and select the **Find groups by name** option:
 - a. Additionally, you can use the **Find groups by rule** option to push multiple groups in one go by setting a rule. An example rule is shown on the second screenshot below.
 - b. Screenshot:

The screenshot shows the Internal Document SCIM application page. The left sidebar includes options for Dashboard, Directory, People, Groups, Profile Editor, Directory Integrations, Self-Service Registration, Profile Sources, Customizations, and Applications (which is selected and highlighted in blue). The main content area is titled 'Internal Document SCIM' and shows a table with one row. The row contains the group name '01101110', a small icon, and two columns for 'Last Push' and 'Push Status'. The 'Push Groups' tab is selected. A context menu is open over the 'Push Groups' button, with the 'Find groups by name' option highlighted with a red box. The menu also includes 'Find groups by rule' and 'By rule' options.

Push Groups to Internal Document SCIM

[Close](#)

Pushed Groups	Push groups by rule	
All	Create a search rule that pushes any matching groups to Internal Document SCIM automatically.	
Errors		
By name	Rule name	Groups that contain the word 'internal'
By rule	Group name	contains internal
	Group description	starts with Enter string to match...
	<input checked="" type="checkbox"/> Immediately push groups found by this rule	
	Create Rule Cancel	

3. Search for the created group's name and select it.

a. **⚠ Keep the setting `Push group memberships immediately`** (found underneath the group name field) checked if you want the group and group assignments to be created and implemented immediately upon pushing the group. Otherwise, untick the checkbox.

b. Screenshot:

Push Groups to Internal Document SCIM

[Close](#)

Pushed Groups	Push groups by name	
All	To sync group memberships from Okta to Internal Document SCIM, choose a group in Okta and a group in the app.	
Errors		
By name	Internal Doc	
By rule	<input checked="" type="radio"/> Internal Documentation Group No description	

4. For this section, we'll leave the push action set to the [Create Group](#) option. Click the Save button.

a. Screenshot:

Push groups by name

To sync group memberships from Okta to Internal Document SCIM, choose a group in Okta and a group in the app.

Group	Match result & push action
 Internal Documentation Group	No match found + Create Group

Internal Documentation G

Save [Save & Add Another](#)

5. Once the group has been pushed, you will be redirected to the list of groups by name and here you will be able to see the groups that are managed via Okta. At this point, the group should now be created on LeadIQ.

a. The first column on the screenshot below refers to the Okta group.

b. The second column refers to the LeadIQ group.

c. The third column is the date & time when the last push was made.

d. The fourth column refers to the group's state.

e. Screenshot:

Internal Document SCIM

Push Groups

Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	 Internal Documentation	 Internal Documentation	September 11, 2024 at 1:08:40 PM GMT+8	Active 
Errors				
By name				
By rule				

Team

Groups & Governance Settings

Group Name	Members	Group Managers
Default	2	Group governance
Internal Documentation Group	9	Group governance Delete

Linking an Okta group to an existing LeadIQ group:

⚠️ IMPORTANT: When an Okta group is linked to an existing LeadIQ group, the member assignments on Okta will override the member assignments that were made manually on LeadIQ. Members assigned only to the linked LeadIQ group and not to the Okta group will be removed from the LeadIQ group when a link is established.

This section covers linking an Okta group to an existing LeadIQ group so group assignments can be done on Okta and changes will be reflected on the LeadIQ group.

1. Create the group to be linked to the LeadIQ group:

- a. The group can either have the same name as the LeadIQ group, or a different name. If it's the latter, the LeadIQ group's name will be updated to match the Okta group's name. For this document, we will be using a different name.

- b. Screenshot:

What are some good suggestions?

Get creative and create groups around your organization structure such as EMEA SDRs, Western Regional Sales Reps, Revenue Tier 1, John's Team. Or group your members by title, for example SDRs, AEs, or Sales Managers.

[Learn more about manager role](#)

Group Name ↑↓	Members ↑↓	Group Managers ↑↓
Default	2	
Internal Documentation Group - Prospector	0	

Groups

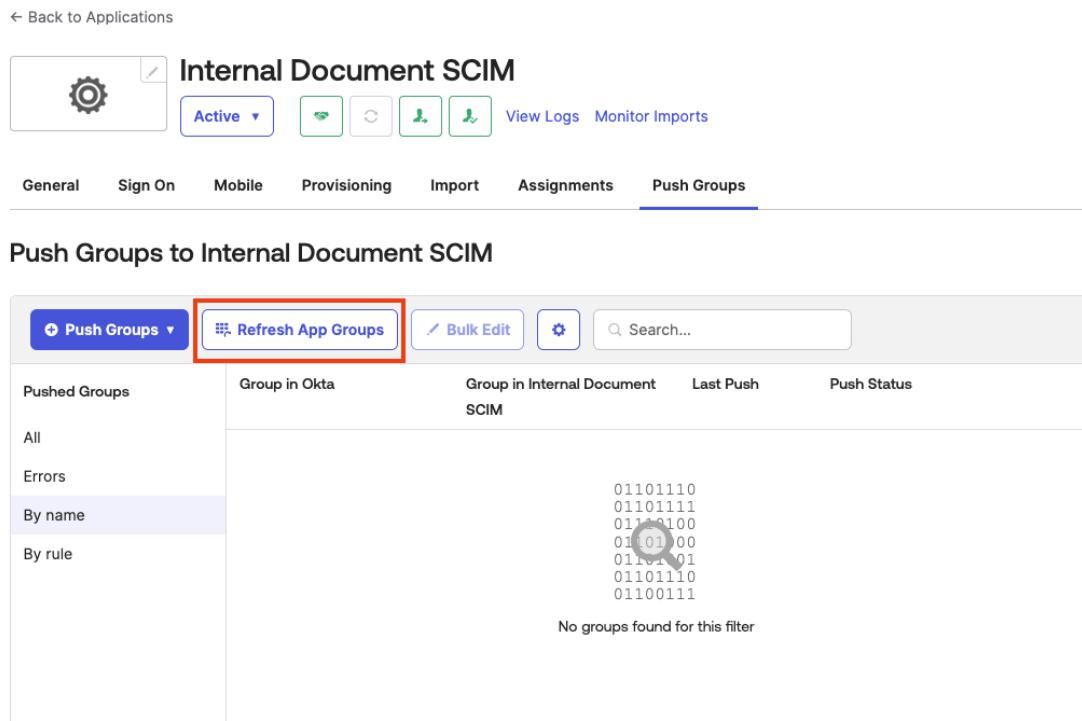
[Help](#)

All Rules

Group name	People	Applications
Internal Documentation Group - Okta No description	0	0

2. Navigate to the application page and under the [Push Groups](#) tab, click the [Refresh App Groups](#) button so that Okta will be able to retrieve the currently available groups on LeadIQ.

a. Screenshot:



Internal Document SCIM

Push Groups

Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All		01101110 01101111 01101100 01101100 01101101 01101110 01100111		
Errors				
By name				
By rule				

No groups found for this filter

3. Click the **Push Groups** button and select the **Find by name** option. Select the created Okta group and set the push action to **Link Group**. On the text field, search for the LeadIQ group. Click the Save button.

a. Screenshot:

Push Groups to Internal Document SCIM

Pushed Groups

Push groups by name

All

Errors

By name

Internal Documentation Group - Okta

By rule

Push group memberships immediately

Group

Internal Documentation Group - Okta

No match found

Link Group

Internal Documentation Group - Prospector

Linking to this group will rename the group in Internal Document SCIM

Save

Save & Add Another

4. Once the link has been established and the Okta group has been pushed, it will appear on the list of pushed groups and the LeadIQ group should be updated to have the same name as the Okta group. Member assignments made on the Okta group will then be reflected on the LeadIQ group.

a. Screenshot:

Internal Documentation

Internal Documentation

September 11, 2024 at 1:33:59 PM

GMT+8

Active

Group governance

Delete

⚠ Note: The cases below work under the assumption that an Okta group is already linked to a LeadIQ group and the Okta group has been pushed.

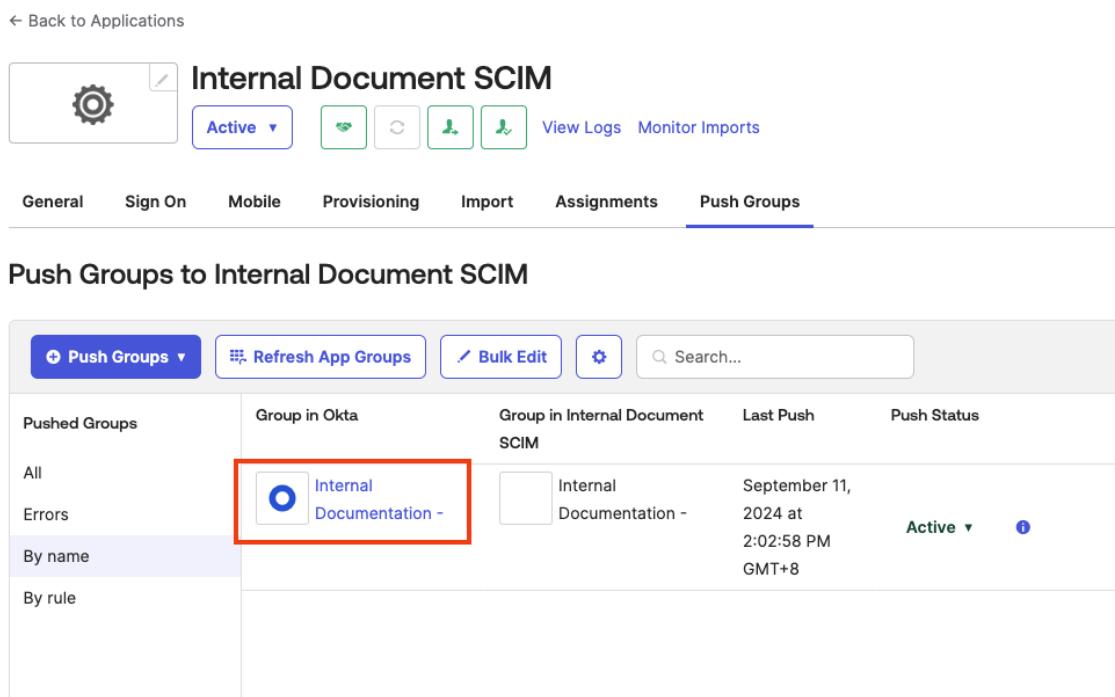
Additionally, the assumption for group assignments is that the team members are provisioned on Okta.

Updating a group's name:

This section covers updating a group's name both on Okta and Prospector given that the groups are linked, and the Okta group has been pushed.

1. Select the group on the [Push Groups](#) page.

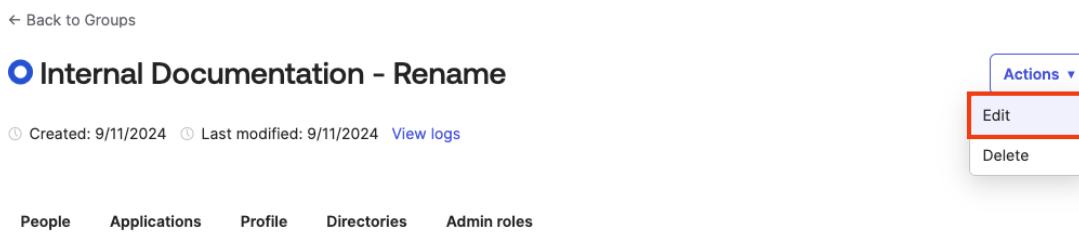
- a. Screenshot:



Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	 Internal Documentation -	 Internal Documentation -	September 11, 2024 at 2:02:58 PM GMT+8	Active 
Errors				
By name				
By rule				

2. Click the Edit option under the Actions button.

- a. Screenshot:



Internal Documentation - Rename

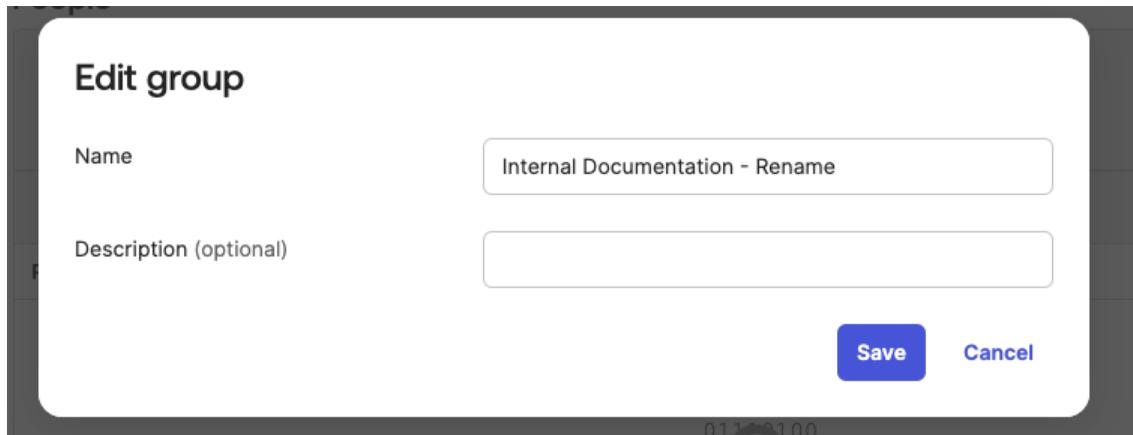
Created: 9/11/2024 Last modified: 9/11/2024 [View logs](#)

Actions  

People Applications Profile Directories Admin roles

3. Update the group's name and save the name.

a. Screenshot:



4. The name should now be updated on both Okta and LeadIQ.

a. Screenshot:

← Back to Groups

Internal Documentation - Rename (Updated)

Created: 9/11/2024 Last modified: 9/11/2024 [View logs](#)

[People](#) [Applications](#) [Profile](#) [Directories](#) [Admin roles](#)

Internal Documentation - Rename (Updated) 0 [Group governance](#) [Delete](#)

Assign a team member to a group:

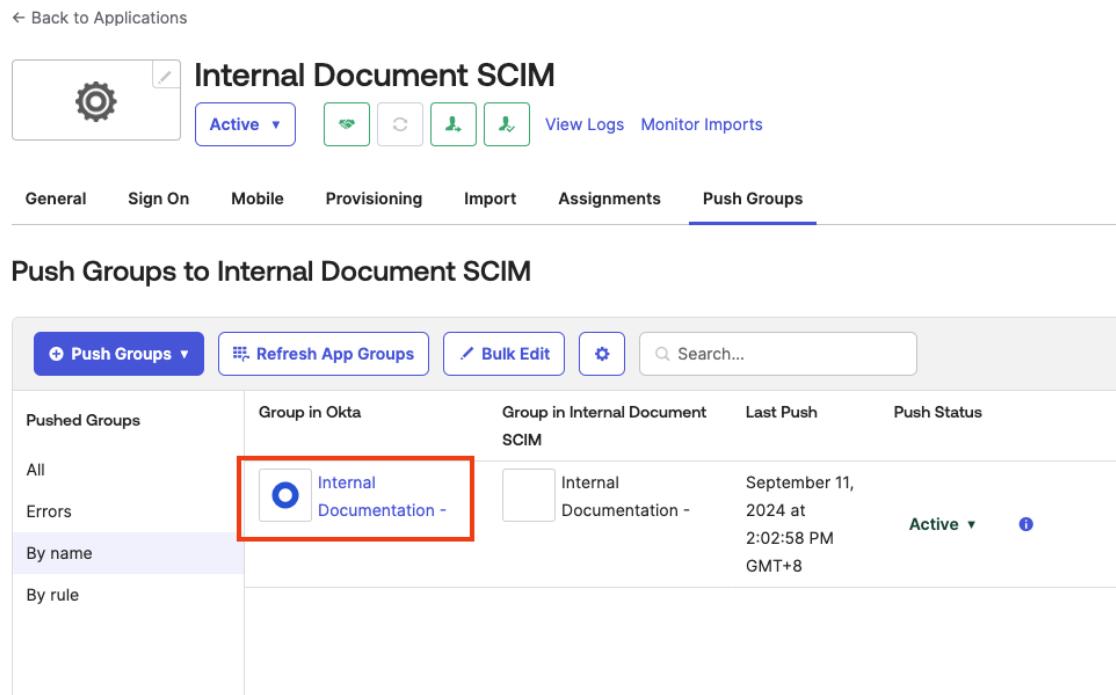
⚠️ IMPORTANT: A team member can only be part of one group at a time. If a team member is assigned to another Okta group while still in a different group,

the group push will fail and the member will not be assigned. The member has to be unassigned first from the current Okta group before getting reassigned to a new group.

This section covers assigning a team member to an Okta group and that the member assignment is reflected on the LeadIQ group.

1. Select the group on the **Push Groups** page

- a. Screenshot:



Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	 Internal Documentation -		September 11, 2024 at 2:02:58 PM GMT+8	Active ⓘ
Errors				
By name				
By rule				

2. Click the Assign People button

- a. Screenshot:

← Back to Groups

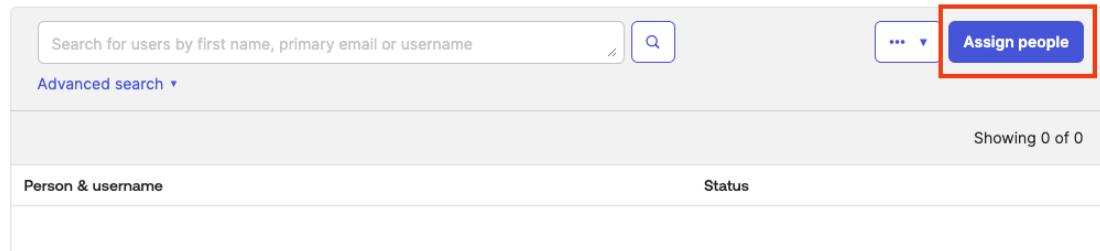
Internal Documentation - Rename (Updated)

Actions ▾

Created: 9/11/2024 Last modified: 9/11/2024 [View logs](#)

People Applications Profile Directories Admin roles

People



Search for users by first name, primary email or username

Advanced search ▾

Showing 0 of 0

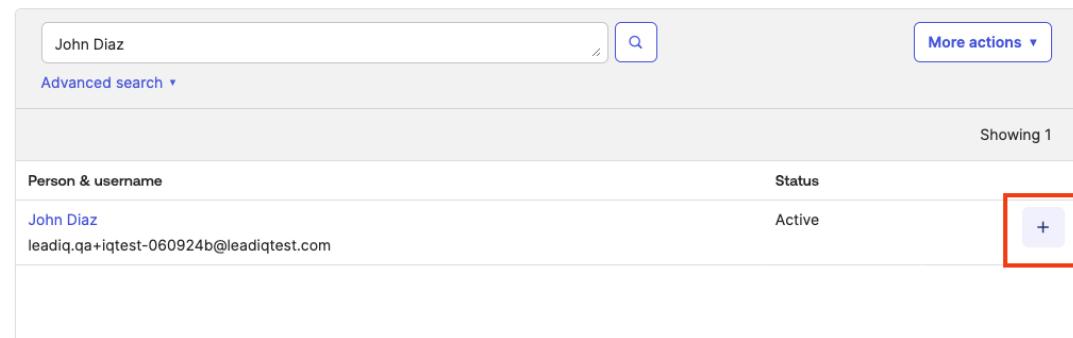
Person & username	Status

3. Search for the team member to add to the group and click the  button, afterwards click the  button.

a. Screenshot:

Assign people to Internal Documentation - Rename (Updated)

Done



John Diaz

Advanced search ▾

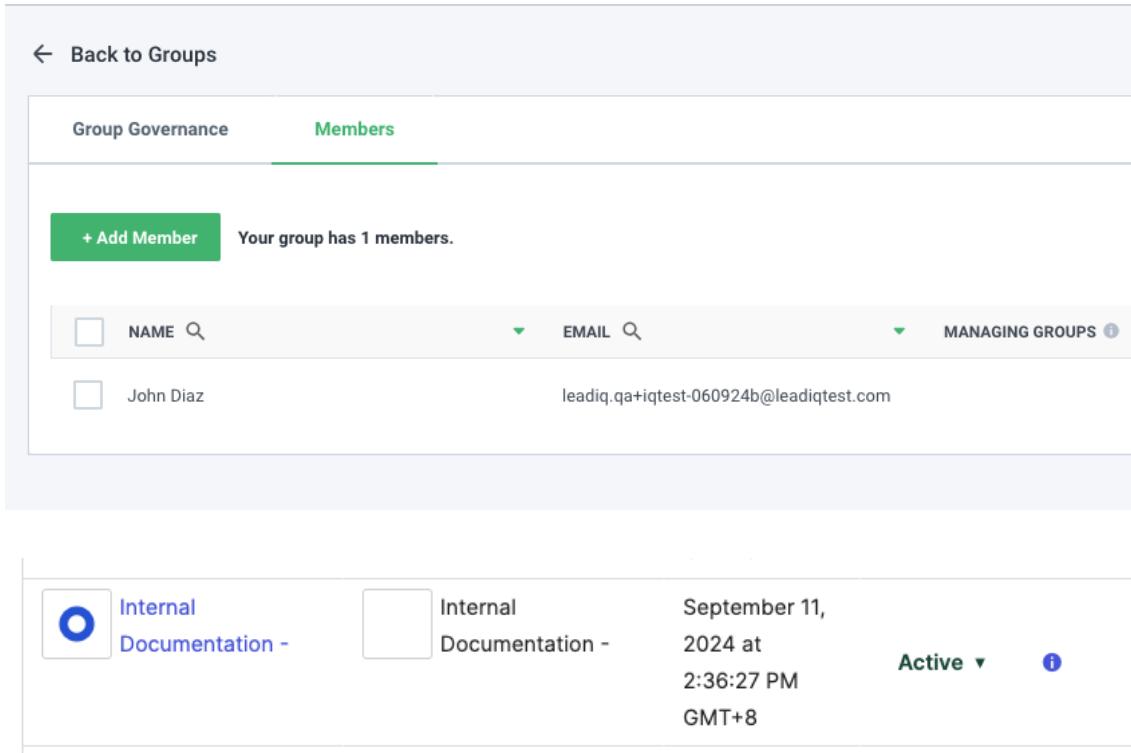
Showing 1

Person & username	Status
John Diaz leadiq.qa+iqtest-060924b@leadiqtest.com	Active

4. The team member should now be assigned to the LeadIQ group. The push status for the Okta group should be set to Active.

a. Screenshot:

Internal Documentation - Rename (Updated)



The image shows two screenshots of the Okta Groups interface. The top screenshot is the 'Members' tab of a group named 'Internal Documentation -'. It shows one member, John Diaz, with the email 'leadiq.qa+iqtest-060924b@leadiqtest.com'. The bottom screenshot shows the group's details, including the name 'Internal Documentation -', creation date 'September 11, 2024 at 2:36:27 PM', and time zone 'GMT+8'. The status is 'Active'.

Unassign a team member from a group:

This section covers unassigning a team member from an Okta group.

1. Select the group on the [Push Groups](#) page.
 - a. Screenshot:

← Back to Applications

Internal Document SCIM

Active ▾    View Logs Monitor Imports

General Sign On Mobile Provisioning Import Assignments Push Groups

Push Groups to Internal Document SCIM

Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	 Internal Documentation -	 Internal Documentation -	September 11, 2024 at 2:02:58 PM GMT+8	Active ▾ 
Errors				
By name				
By rule				

2. Click the  button for the team member to be unassigned from group.

a. Screenshot:

← Back to Groups

Internal Documentation - Rename (Updated)

Actions ▾

Created: 9/11/2024 Last modified: 9/11/2024 [View logs](#)

People Applications Profile Directories Admin roles

People

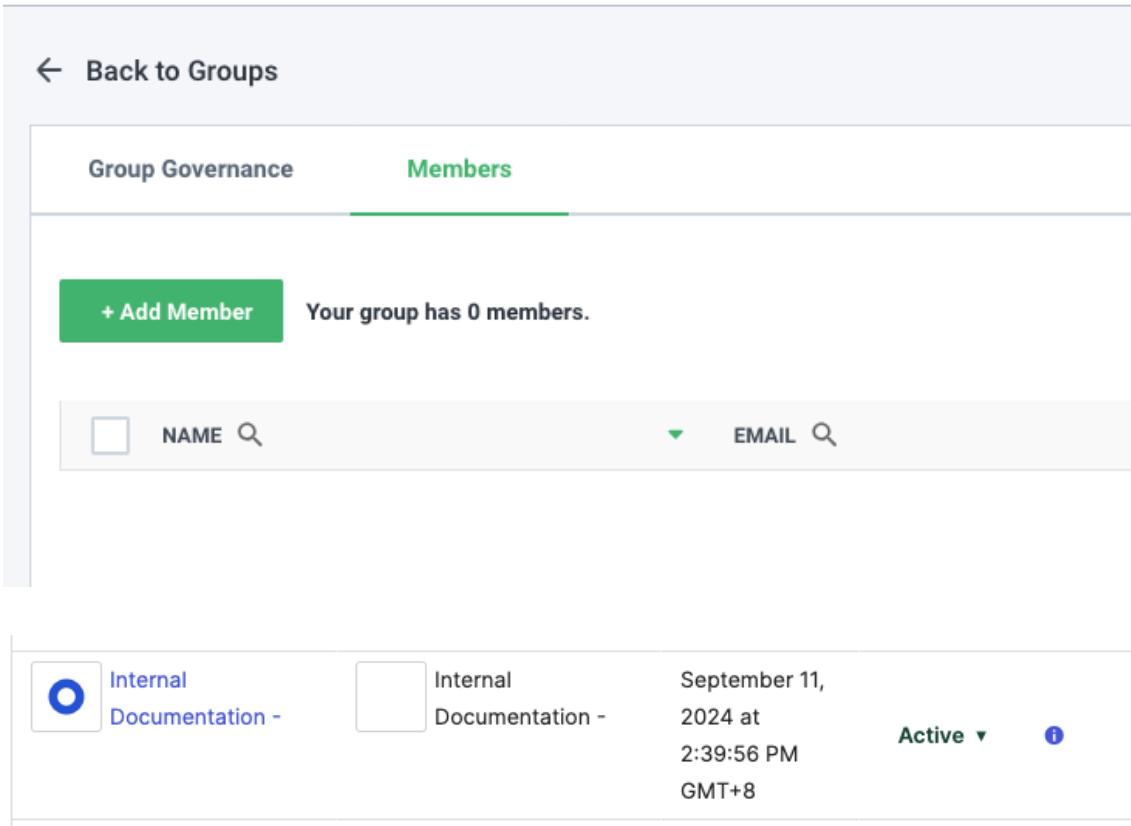
Person & username	Status	
John Diaz leadiq.qa+iqtest-060924b@leadiqtest.com	Active	

Person & username	Status	
John Diaz leadiq.qa+iqtest-060924b@leadiqtest.com	Active	 Removed Assign

3. Once unassigned, the member should no longer be a member of the LeadIQ group. The push status for the Okta group should be set to Active.

a. Screenshot:

Internal Documentation - Rename (Updated)



The screenshot shows the Okta Group Governance interface. At the top, there is a back button labeled "Back to Groups". Below it, there are two tabs: "Group Governance" and "Members", with "Members" being the active tab. A green button labeled "+ Add Member" is visible. The main content area displays a message: "Your group has 0 members." Below this, there are search fields for "NAME" and "EMAIL". A single group entry is listed at the bottom. The group has a blue circular icon, the name "Internal Documentation -", and a timestamp of "September 11, 2024 at 2:39:56 PM GMT+8". The status is "Active" with a dropdown arrow and an info icon.

Unlink a group (Delete Both Strategy):

This section covers unlinking a group on Okta following the `Delete the group in the target app` strategy which deletes the pushed Okta group and the linked LeadIQ group. By doing this, assigned members will be unassigned from the LeadIQ group.

1. On the `Push Groups` page, click the Active status for the group to be unlinked. Click the `Unlink pushed group` option.

a. Screenshot:

The screenshot shows the 'Push Groups' section in Okta. The top navigation bar includes 'Push Groups', 'Refresh App Groups', 'Bulk Edit', and a search bar. The main table lists 'Pushed Groups' with columns for 'Group in Okta', 'Group in Test SCIM', 'Last Push', and 'Push Status'. A message at the top states '1 group has an error. Click Retry All Groups to re-push all groups that have an error.' A 'Retry All Groups' button is available. The table rows show groups like 'Internal Documentation -' and 'My Other Group'. A context menu is open for the 'Internal Documentation' group, listing options: 'Deactivate group push', 'Unlink pushed group', and 'Push now'. The 'Unlink pushed group' option is highlighted with a red box.

Pushed Groups	Group in Okta	Group in Test SCIM	Last Push	Push Status
All	1 group has an error. Click Retry All Groups to re-push all groups that have an error.			
Errors	Show Errors			
By name	Internal Documentation -	Internal Documentation -	August 30, 2024 at 12:03:36 PM	GMT+8
By rule	Internal Documentation	Internal Documentation	September 11, 2024 at 2:39:56 PM	Active
	My Other Group	My Other Group	My Other Group	My other peeps
	Tokyo Sales Team	Tokyo Sales Team	Bronze	Bronze

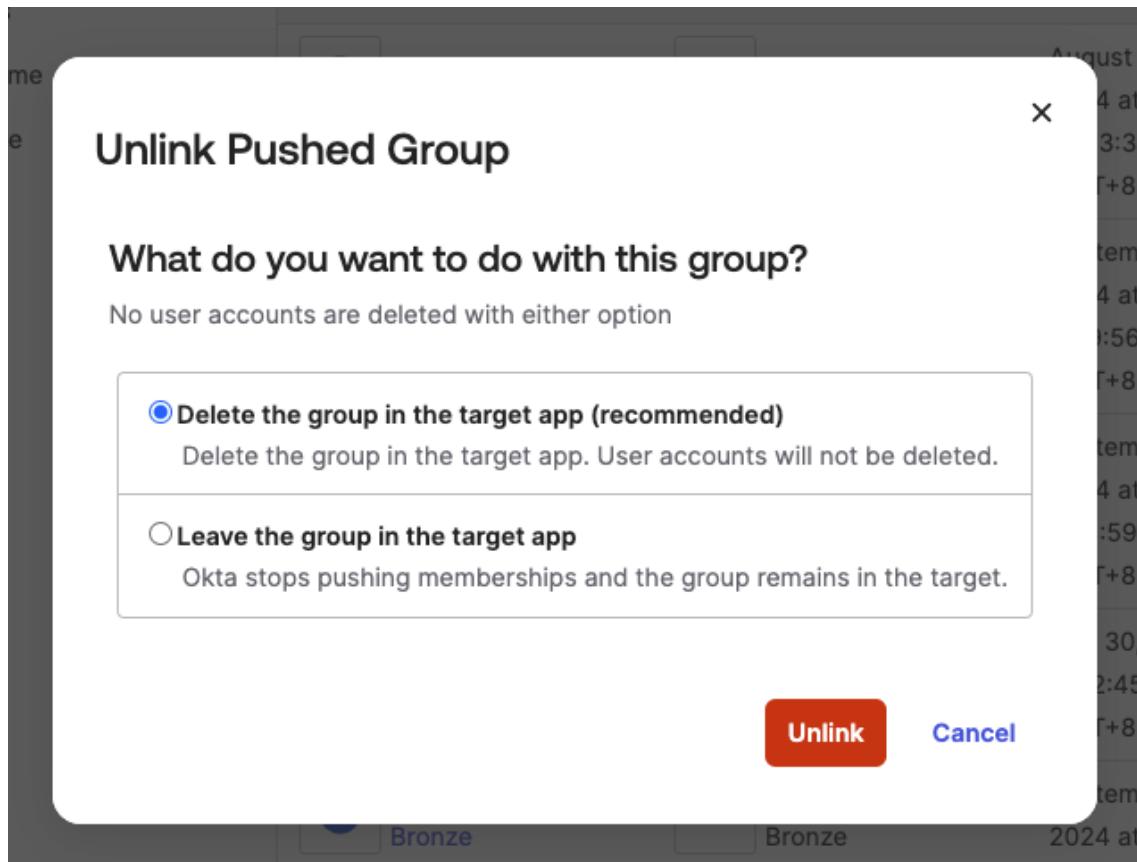
Deactivate group push
Stop pushing group memberships.
Existing memberships are unaffected.

Unlink pushed group
Stop pushing group memberships
and optionally delete the pushed group.

Push now
Push this group's memberships to Test SCIM

2. Select the Delete the group in the target app (recommended) strategy and click Unlink.

a. Screenshot:



3. Once the pushed group has been unlinked, the LeadIQ group should be deleted and the members should be unassigned from the LeadIQ group.

- a. Screenshot:

Group	Members	Actions
Disabled New Group	0	Group governance Delete
Internal Documentation Group - Prospector	0	Group governance Delete
Michigan Prospecting Team	0	Group governance Delete

Profile	Actions
John Diaz	<input type="checkbox"/> leadiq.qa+qtest-060924b@leadiqtest.c...
leadiq.qa+qtest-060924b@leadiqtest.c...	<input type="checkbox"/> 0 / 200

Profile	Actions
John Diaz	<input type="checkbox"/> leadiq.qa+qtest-060924b@leadiqtest.c...
leadiq.qa+qtest-060924b@leadiqtest.c...	<input type="checkbox"/> 0 / 200

Unlink a group (Retain Strategy):

⚠️ IMPORTANT: After doing this, team members assigned on the unlinked Okta group should be unassigned from the LeadIQ group first before getting

reassigned to a new Okta group. Otherwise the new assignment will fail since the member is still part of a LeadIQ group.

This section covers unlinking a group on Okta following the [Leave the group in the target app](#) strategy which deletes the pushed Okta group but retain the linked LeadIQ group. By doing this, assigned members will be retained on the LeadIQ group.

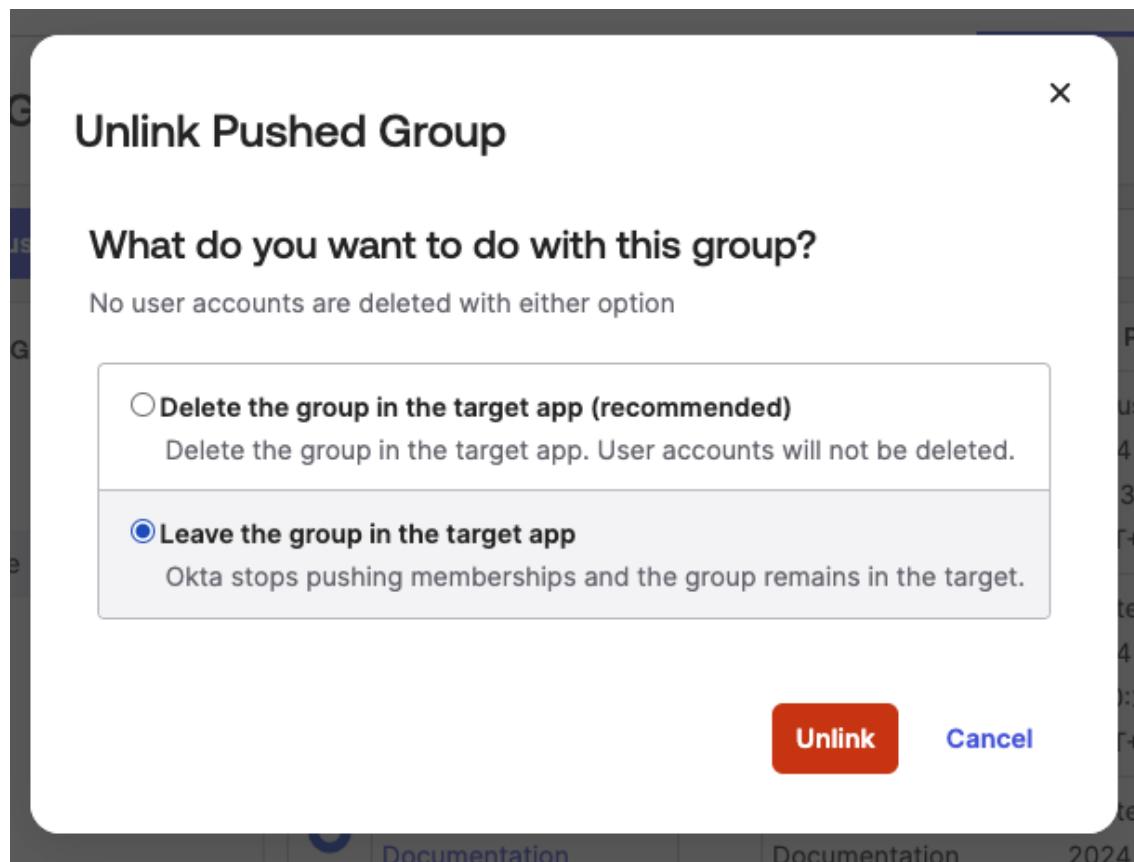
1. On the [Push Groups](#) page, click the Active status for the group to be unlinked. Click the [Unlink pushed group](#) option.

a. Screenshot:

Pushed Groups	Group in Okta	Group in Test SCIM	Last Push	Push Status
All	1 group has an error. Click Retry All Groups to re-push all groups that have an error. Retry All Groups			
Errors	Show Errors			
By name	No description	No description	August 30, 2024 at 12:03:36 PM	Active i
By rule	Internal Documentation -	Internal Documentation -	September 11, 2024 at 2:39:56 PM	Active i
	Internal Documentation	Internal Documentation	Deactivate group push Stop pushing group memberships. Existing memberships are unaffected.	
	My Other Group	My Other Group	Unlink pushed group Stop pushing group memberships and optionally delete the pushed group.	
	Tokyo Sales Team Bronze	Tokyo Sales Team Bronze	Push now Push this group's memberships to Test SCIM	

2. Select the [Leave the group in the target app](#) strategy and click Unlink.

a. Screenshot:

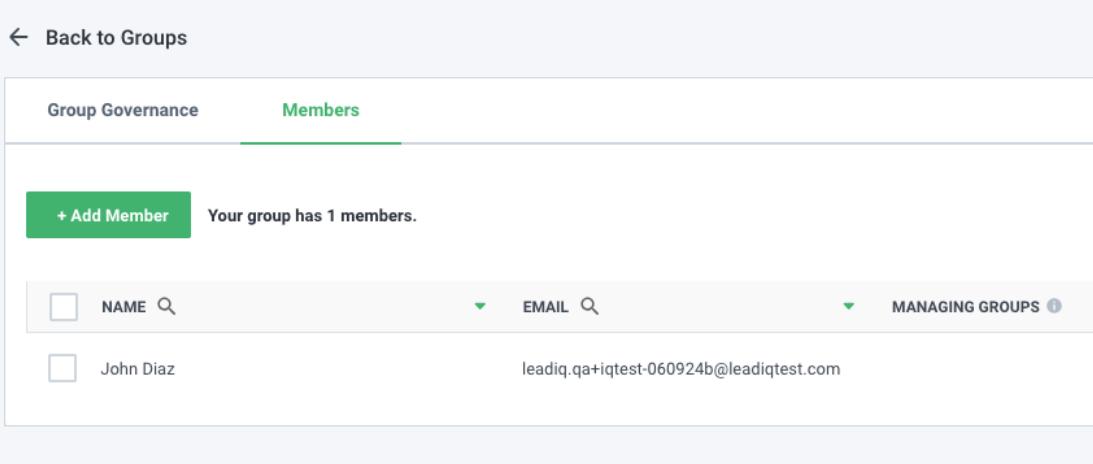


3. Once the pushed group has been unlinked, the LeadIQ group should be retained and the members should be retained on the LeadIQ group.

- a. Screenshot:



Internal Documentation - Rename (Updated)



← Back to Groups

Group Governance Members

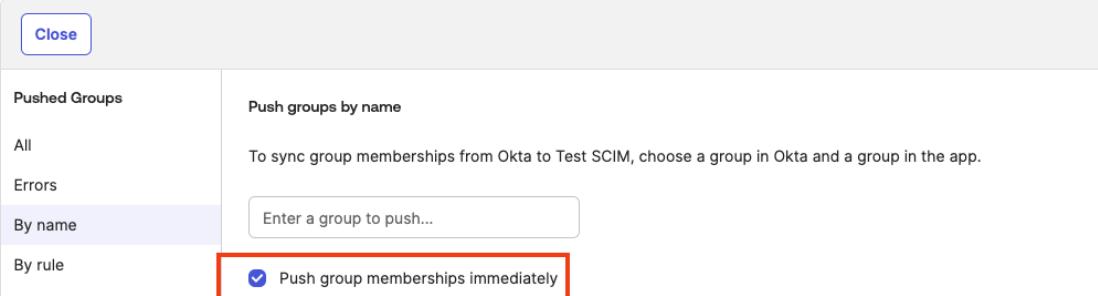
+ Add Member Your group has 1 members.

NAME	EMAIL	MANAGING GROUPS
John Diaz	leadiq.qa+iqtest-060924b@leadiqtest.com	

Other options:

1. Push group memberships immediately
 - a. When enabled, pushed groups are automatically created on LeadIQ and assignments are automatically done.
 - b. When disabled, pushed groups are not automatically created on LeadIQ and assignments are not done. The pushed groups will be tagged as Inactive and changes on the group will not be implemented on LeadIQ until the group is activated.
 - c. Screenshot:

Push Groups to Test SCIM



Close

Pushed Groups

All

Errors

By name

By rule

Push groups by name

To sync group memberships from Okta to Test SCIM, choose a group in Okta and a group in the app.

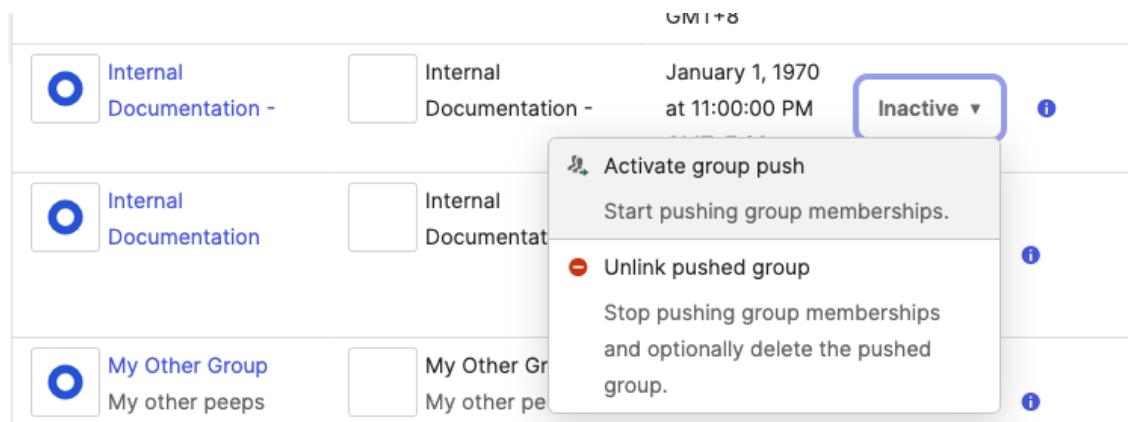
Enter a group to push...

Push group memberships immediately

2. Activate group push

- When triggered, the Okta group will be pushed to LeadIQ and group assignments will be implemented. The pushed group's status will be updated to Active if successful.

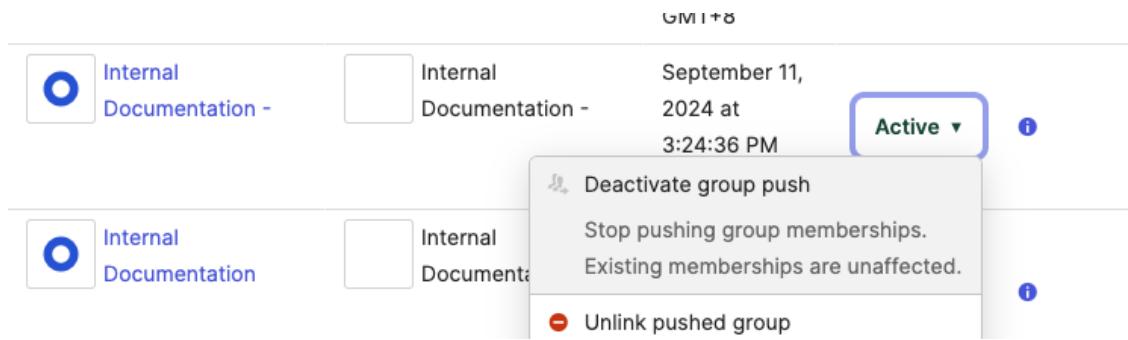
b. Screenshot:



3. Deactivate group push

- When triggered, any succeeding changes to the Okta group will not be applied to the linked LeadIQ group. The pushed group's status will be updated to Inactive.

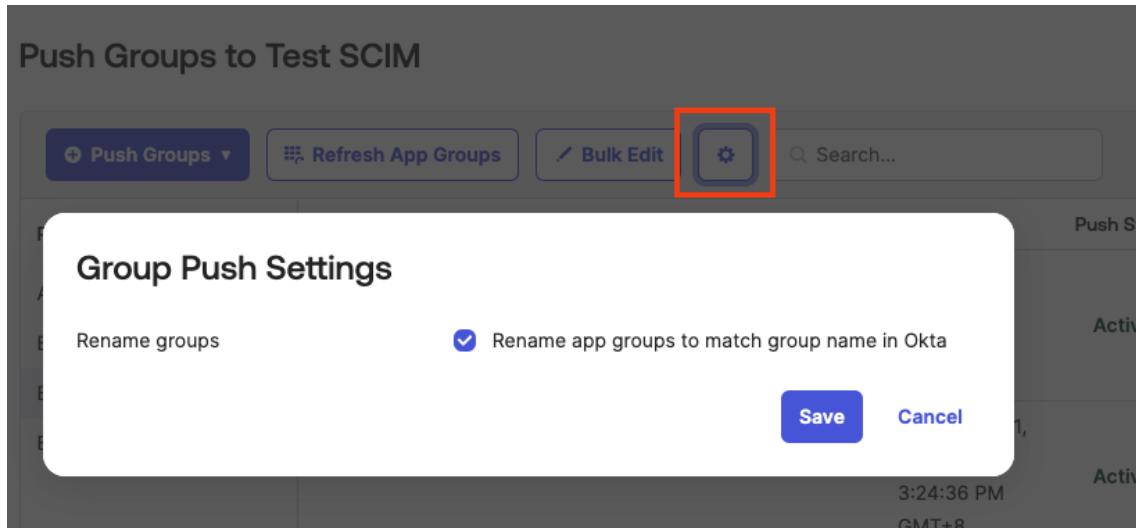
b. Screenshot:



4. Rename app groups to match group name in Okta

- When enabled, LeadIQ group names will always be updated to match Okta group names
- When disabled, LeadIQ group names will retain the names regardless of Okta group name updates

c. Screenshot:

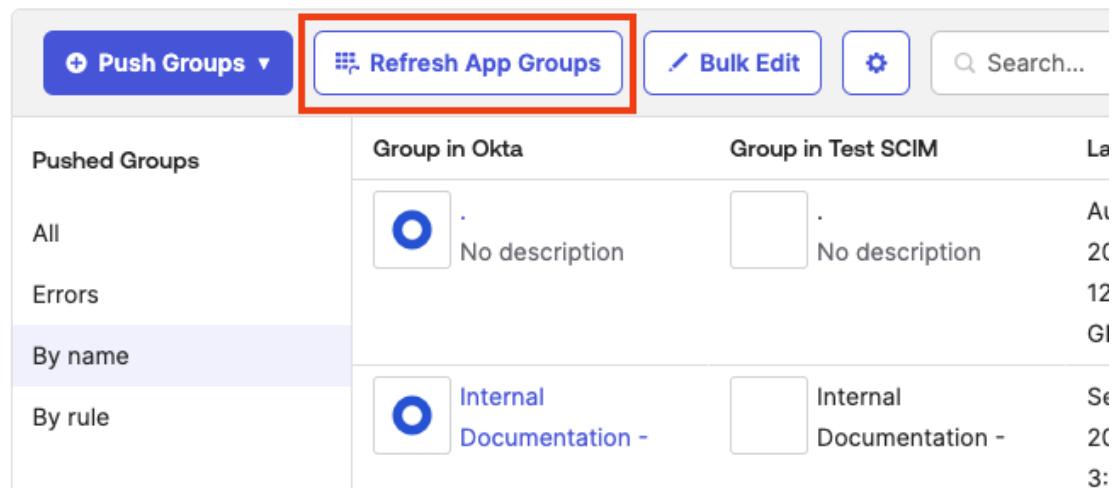


5. Refresh app groups

- When triggered, this will fetch all currently available LeadIQ groups. Should always be used when creating and linking Okta groups.

b. Screenshot:

Push Groups to Test SCIM



The screenshot shows the main interface for pushing groups. At the top, there are buttons for '+ Push Groups' (with a dropdown arrow), 'Refresh App Groups' (which is highlighted with a red box), 'Bulk Edit', and a settings gear icon. Below this is a search bar. The main area is a table with columns for 'Pushed Groups', 'Group in Okta', 'Group in Test SCIM', and 'Last updated'. The 'Pushed Groups' column has buttons for 'All', 'Errors', 'By name' (which is selected and highlighted with a red box), and 'By rule'. The 'Group in Okta' and 'Group in Test SCIM' columns show a list of groups, with the first group in each column having 'No description'.

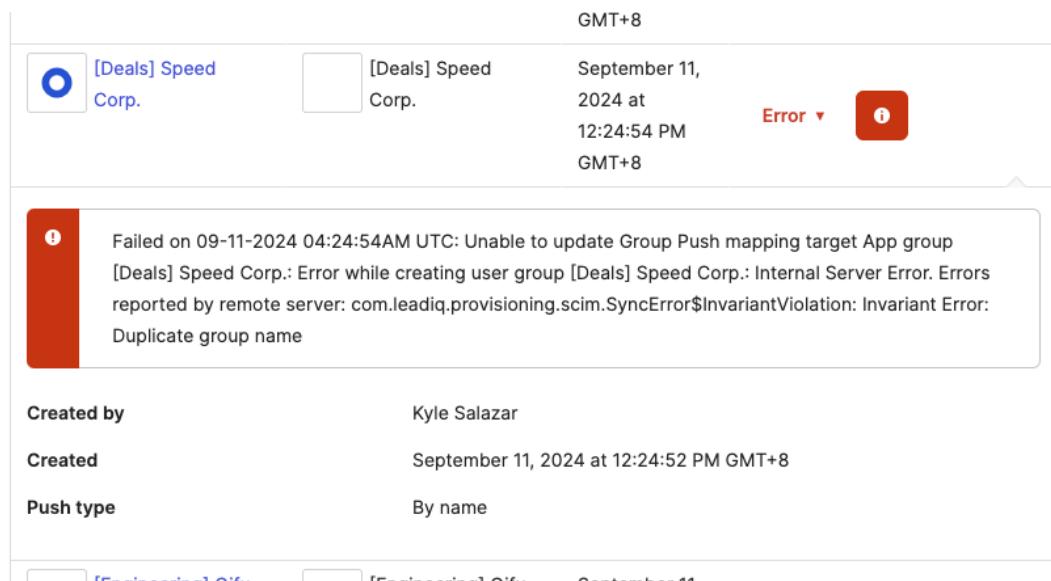
Pushed Groups	Group in Okta	Group in Test SCIM	Last updated
All	 No description	 No description	At 2023-10-12 11:12:30 GMT+8
Errors			12:30:00
By name			11:12:30
By rule	 Internal Documentation -	 Internal Documentation -	2023-10-12 11:12:30

Errors / Limitations:

- Pushing an unlinked Okta group that has the same name as an existing LeadIQ group will not allow the user to create a duplicate group and the

error message below will be displayed.

a. Screenshot:



The screenshot shows a SCIM interface for managing group mappings. At the top, there are two columns: 'Source' (containing '[Deals] Speed Corp.') and 'Target' (containing '[Deals] Speed Corp.'). To the right of these columns are the dates 'September 11, 2024 at 12:24:54 PM' and the time zone 'GMT+8'. A red 'Error' button is visible. Below this, a red box highlights an error message: 'Failed on 09-11-2024 04:24:54AM UTC: Unable to update Group Push mapping target App group [Deals] Speed Corp.: Error while creating user group [Deals] Speed Corp.: Internal Server Error. Errors reported by remote server: com.leadiq.provisioning.scim.SyncError\$InvariantViolation: Invariant Error: Duplicate group name'. Below the error message, there are details about the push: 'Created by' (Kyle Salazar), 'Created' (September 11, 2024 at 12:24:52 PM GMT+8), and 'Push type' (By name). At the bottom, there are navigation buttons for 'Previous' and 'Next'.

2. Import groups functionality is not yet supported. LeadIQ groups cannot be imported to the Okta application yet as of writing.

a. Screenshot:

SCIM Connection

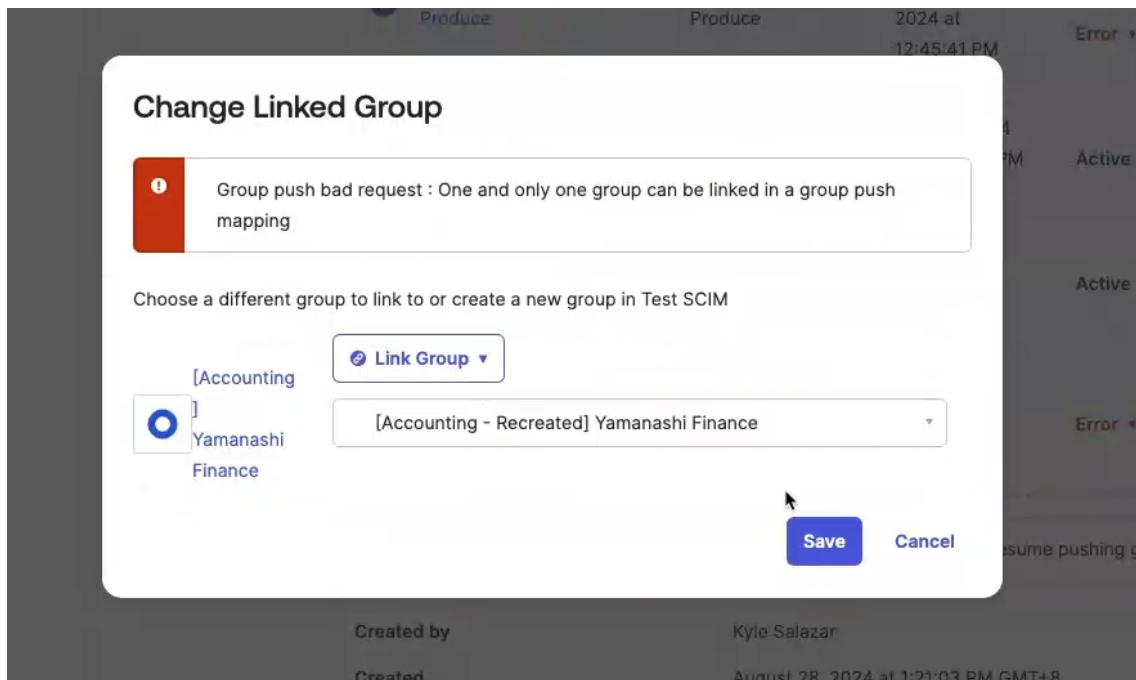
Edit

SCIM version	2.0
SCIM connector base URL	https://provisioning.leadiq.com/scim/v2
Unique identifier field for users	userName
Supported provisioning actions	<input type="checkbox"/> Import New Users and Profile Updates <input checked="" type="checkbox"/> Push New Users <input checked="" type="checkbox"/> Push Profile Updates <input checked="" type="checkbox"/> Push Groups <input type="checkbox"/> Import Groups
Authentication Mode	HTTP Header
HTTP Header	
Authorization	Bearer *****

3. Changing linked groups is not yet supported. This option would appear on an Okta group when a linked LeadIQ group has been deleted while the Okta group is still active.

a. Screenshot:

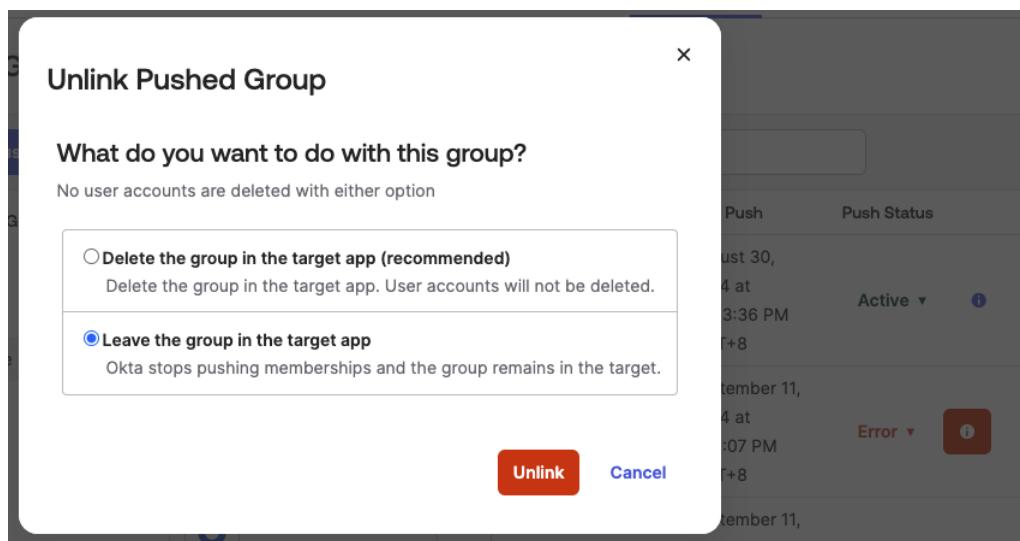
The screenshot shows a group configuration in the Okta SCIM interface. The group is named "[Accounting] Yamanashi Finance". The "Created by" field is listed as "Kyle Salazar" and the "Created" field is "August 28, 2024 at 1:21:03 PM GMT+8". The "Push type" is "By name". A red box highlights a message in a red box stating: "Linked group is missing in Test SCIM. [Change the linked group](#) to resume pushing group memberships." An "Error" button is visible next to the message. The status bar at the top shows "GMT+8".



1. Workaround to changing the linked group is as follows:

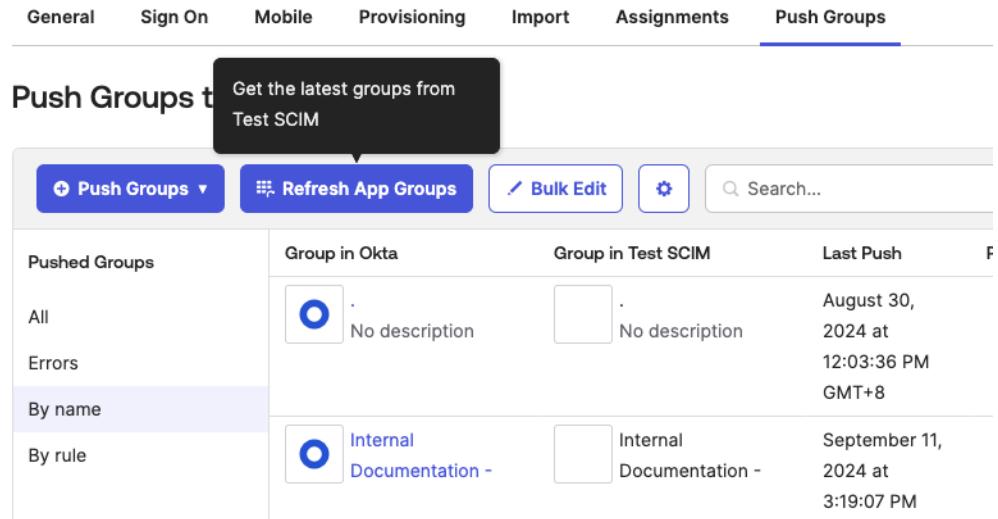
- Unlink the Okta group with the `Leave the group in the target app` strategy

i. Screenshot:



- Refresh the app groups on Okta to fetch all currently available LeadIQ groups

i. Screenshot:



Pushed Groups	Group in Okta	Group in Test SCIM	Last Push	F
All	 . No description	 . No description	August 30, 2024 at 12:03:36 PM GMT+8	
Errors				
By name	 Internal Documentation -	 Internal Documentation -	September 11, 2024 at 3:19:07 PM	
By rule				

c. Push the Okta group again and select Link Group as push action, then select the new LeadIQ group to link it with. Once everything is set, click Save. This should then link the Okta group with another LeadIQ group.

i. Screenshot:

Push Groups to Test SCIM

[Close](#)

Pushed Groups	Push groups by name
All	To sync group memberships from Okta to Test SCIM, choose a group in Okta and a group in the app.
Errors	
By name	Internal Documentation - Rename (Updated)
By rule	<input checked="" type="checkbox"/> Push group memberships immediately
Group	Match result & push action
 Internal Documentation - Rename (Updated)	No match found
	Link Group ▾
	<div style="border: 1px solid #ccc; padding: 5px; display: none;"><p>No description</p><p>[Engineering] Gifu C</p><p>No description</p><p>[Support] Mie</p><p>No description</p><p>[Prospector] Group A</p><p>No description</p></div>
	Save Save & Add Another