

sennovate

OKTA USE CASE

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Purpose of the document.

Okta Workflows will be set up to automatically assign users to appropriate groups based on their regional attributes. When a new user is created in Okta, the workflow evaluates the user's Region attribute and dynamically adds them to the corresponding regional group (US, EU, or Local) without manual intervention.

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User Group Management Based on Region

This workflow is configured to trigger when a new user is created in Okta. The workflow automatically evaluates the user's Region attribute and assigns them to the appropriate regional group based on the following logic:

- If Region = "US" → User is added to US - Group
- If Region = "EU" → User is added to EU - Group
- If Region = any other value → User is added to Local - Group

1. Parent Flow

The parent flow is triggered when a new user is created in Okta. It captures the user creation event and retrieves the user details including the Region attribute.

The image displays two side-by-side panels from the Okta workflow editor, connected by a plus sign and a pin icon. The left panel is titled 'Okta User Created' and shows an 'Output' section with a list of attributes: Date and Time, Message, Event ID, Event Type, Event Time, Version, Admin (with a dropdown arrow), Okta User (with an orange arrow), and ID. The right panel is titled 'Okta Read User' and shows a 'User' section with a field for 'ID or Login*' containing the 'ID' attribute. Below this is a 'System Properties' section with fields for ID, Status, Created, Activated, Status Changed, and Last Login. Both panels have a search bar and a settings gear icon at the bottom.

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2. Branching Logic

The workflow uses conditional branching (If/Else) to evaluate the Region attribute and direct the user to the appropriate group assignment action:

Branch 1: If Region == "US"

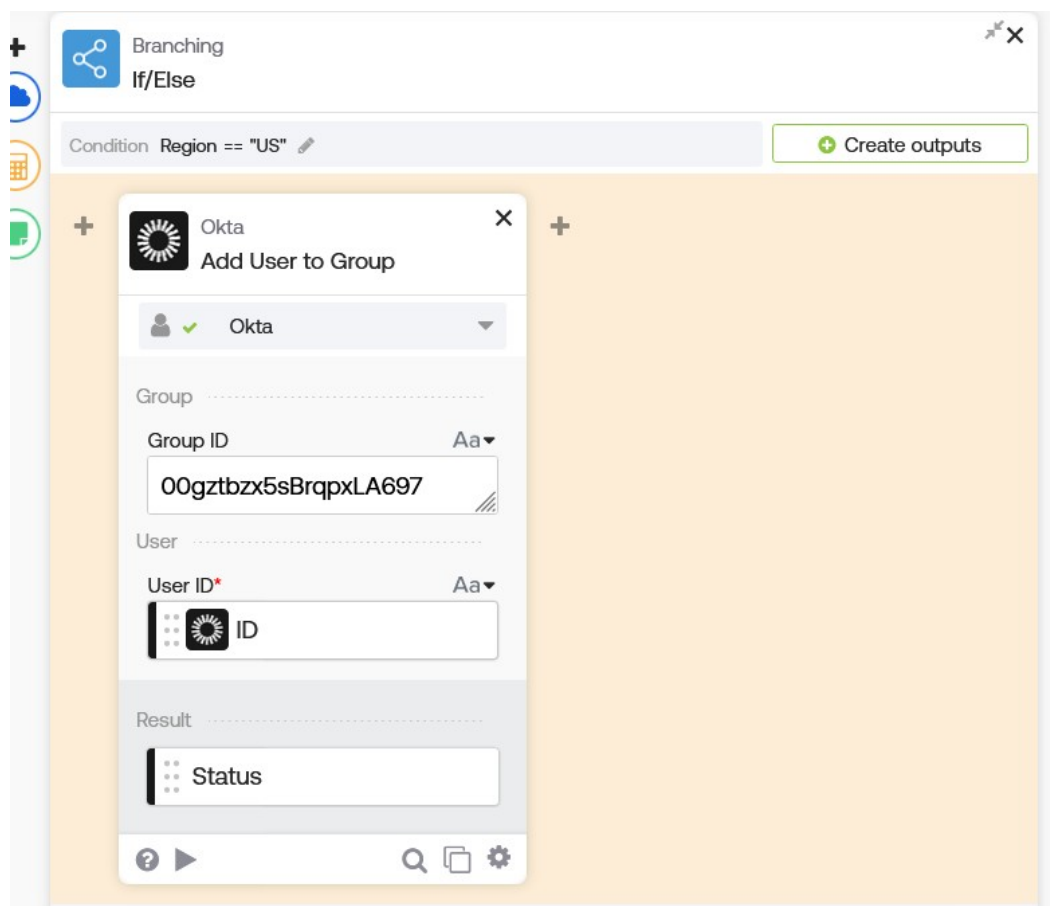
→ Add User to Group: US - Group (Group ID: 00gztbzx5sBrqpxLA697)

Branch 2: If Region == "EU"

→ Add User to Group: EU - Group (Group ID: 00gztcImOIRIMHbKV697)

Branch 3: Else (any other region)

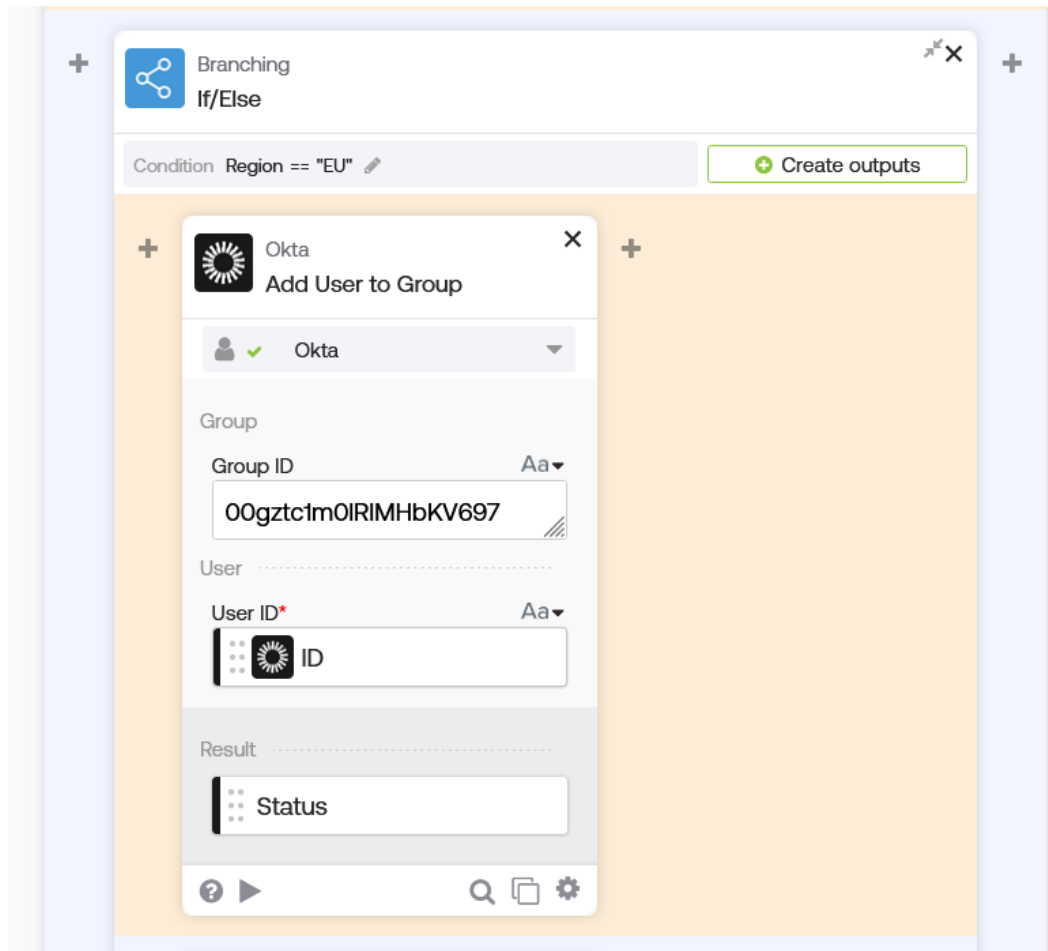
→ Add User to Group: Local - Group (Group ID: 00gzunzfztvJbC1kt697)



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EU Region Branch

When a user is created with Region = "EU", the workflow adds them to the EU - Group.



Local (Default) Region Branch

For any other region value (or if Region is not specified), the user is added to the Local - Group.

Okta

×

Add User to Group

Okta

Group

Group ID

00gzunzfztvJbC1kt697

User

User ID*

ID

Result

Status

?

▶

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3. Region Attribute Configuration

The Region attribute is a custom user profile attribute that has been created in Okta. This attribute is used to identify the geographical region of each user.

- Display name: Region
- Variable name: Region
- Data type: string
- Attribute type: Custom

Manager	manager	string	Base		
Region	Region	string	Custom		

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4. User Creation Process

When adding a new user to Okta, the administrator fills in the user details including the Region field. The Region attribute has a default value of "US" but can be modified to match the user's actual location.

User creation form includes:

- User type
- First name
- Last name
- Username (must be an email)
- Primary email
- Secondary email (optional)
- Groups (optional)
- Region (default: US)
- Activation setting

Add Person

User type ⓘ

User ▼

First name

Last name

Username

Must be an email

Primary email

Secondary email (optional)

Groups (optional)

Region

US

Default value

Activation

Activate now ▼

☐ I will set password

Do not send unsolicited or unauthorized activation emails. [Read more](#)

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5. Result Verification

After the workflow executes, you can verify the automatic group assignment by checking the user's profile in the Okta Directory.

Example: User "Camlin Sharpner" (dicaf67177@desiys.com)

- Created with Region = "US"
- Automatically added to two groups:
 1. Everyone (default Okta group)
 2. US - Group (assigned by workflow)

The screenshot displays the Okta user profile for 'camlin sharpner' with email 'dicaf67177@desiys.com'. It includes buttons for 'Reset or Remove password' and 'More Actions'. Below are links for 'User Change', 'Active', and 'View Logs'. A navigation bar shows tabs for 'Applications', 'Groups' (selected), 'Profile', 'Devices', 'Admin roles', and 'Pre-enrolled authenticators'. The 'Groups' section features a search input 'Type group to add...' and a list of assigned groups: 'Everyone' (All users in your organization) and 'US - Group' (US Group to add US Users • Manually managed), each with a removal 'x' icon.

Group	Action
Everyone All users in your organization	x
US - Group US Group to add US Users • Manually managed	x

Benefits

- Eliminates manual group assignment
- Ensures consistent group membership based on region
- Reduces administrative overhead

- Minimizes human error in user provisioning
- Scalable solution for global organizations

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