

**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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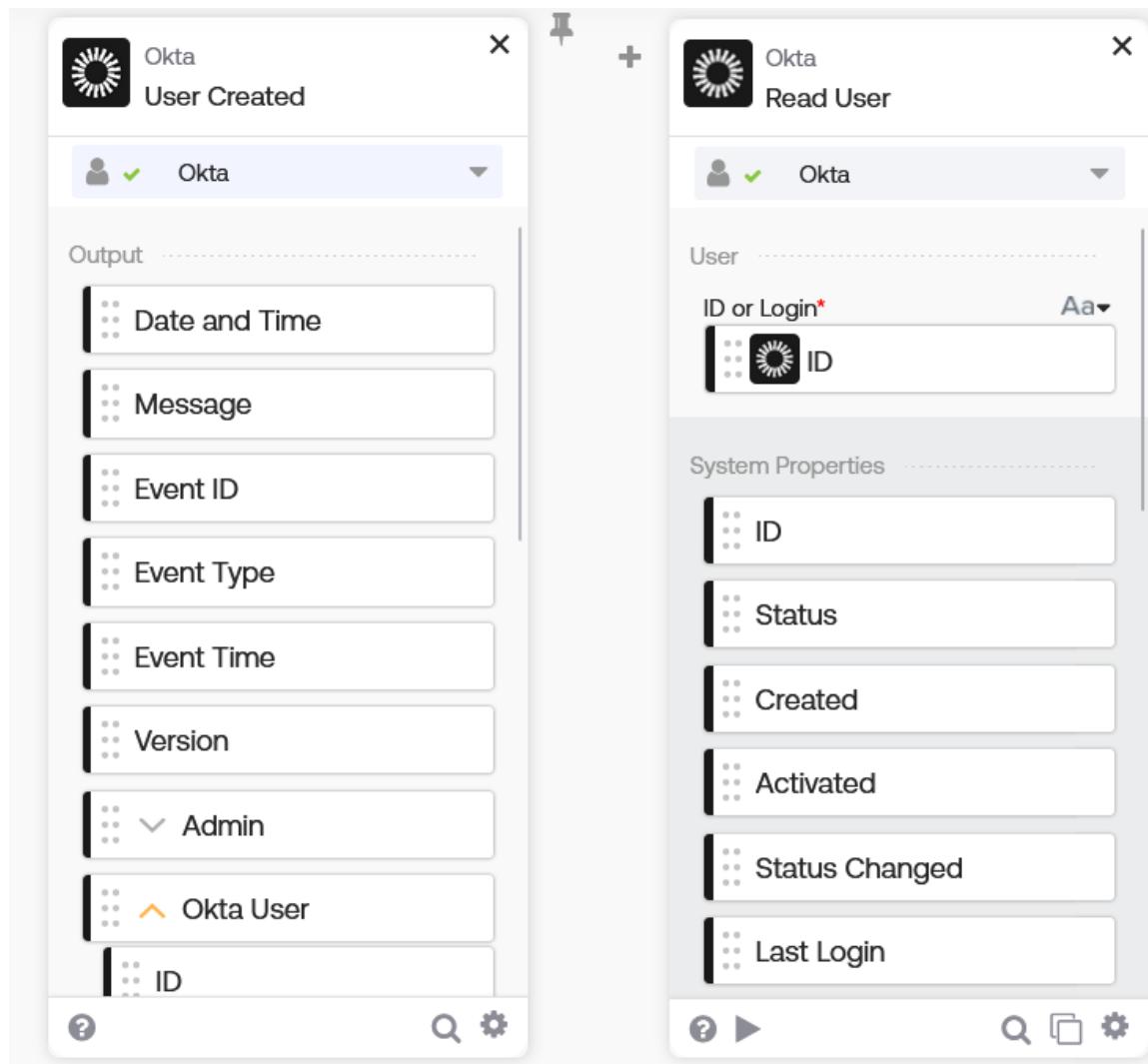
## User Group Management Based on Region

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.



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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"

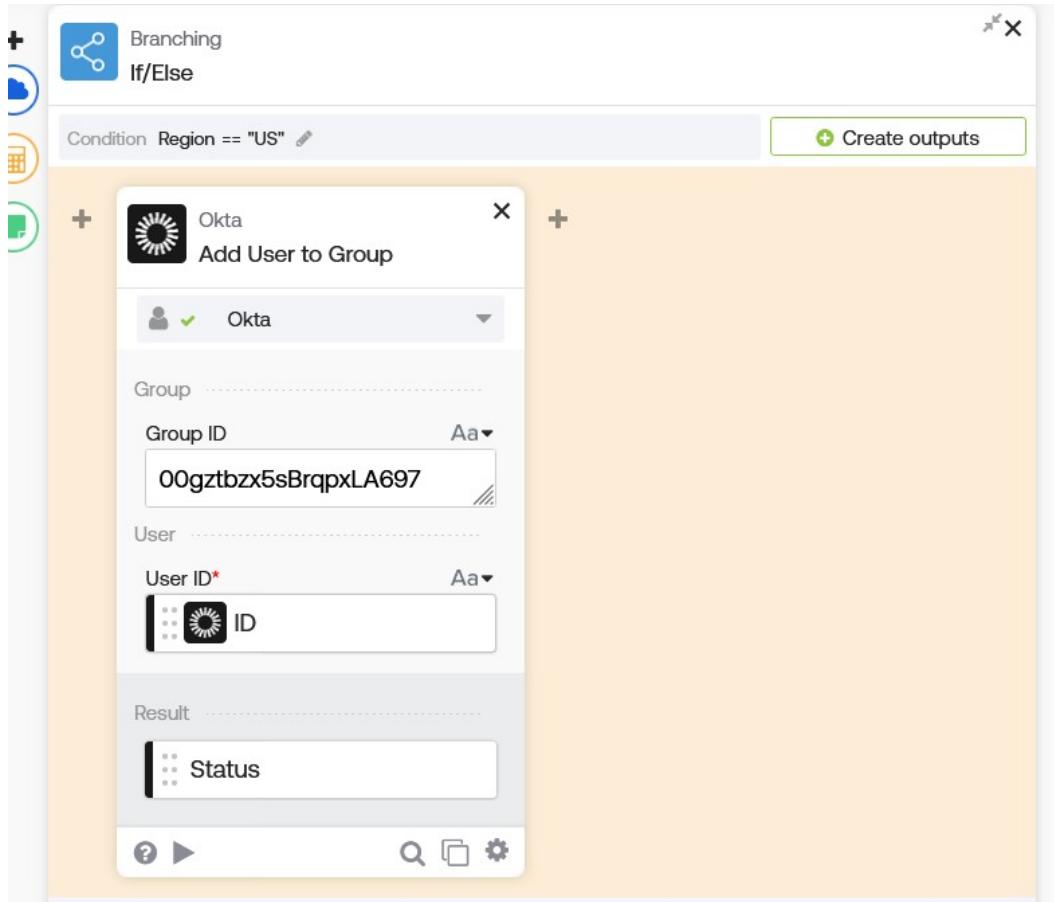
→ Add User to Group: US - Group (Group ID: 00gztbxz5sBrqpxLA697)

Branch 2: If Region == "EU"

→ Add User to Group: EU - Group (Group ID: 00gztclmOIRIMHbKV697)

Branch 3: Else (any other region)

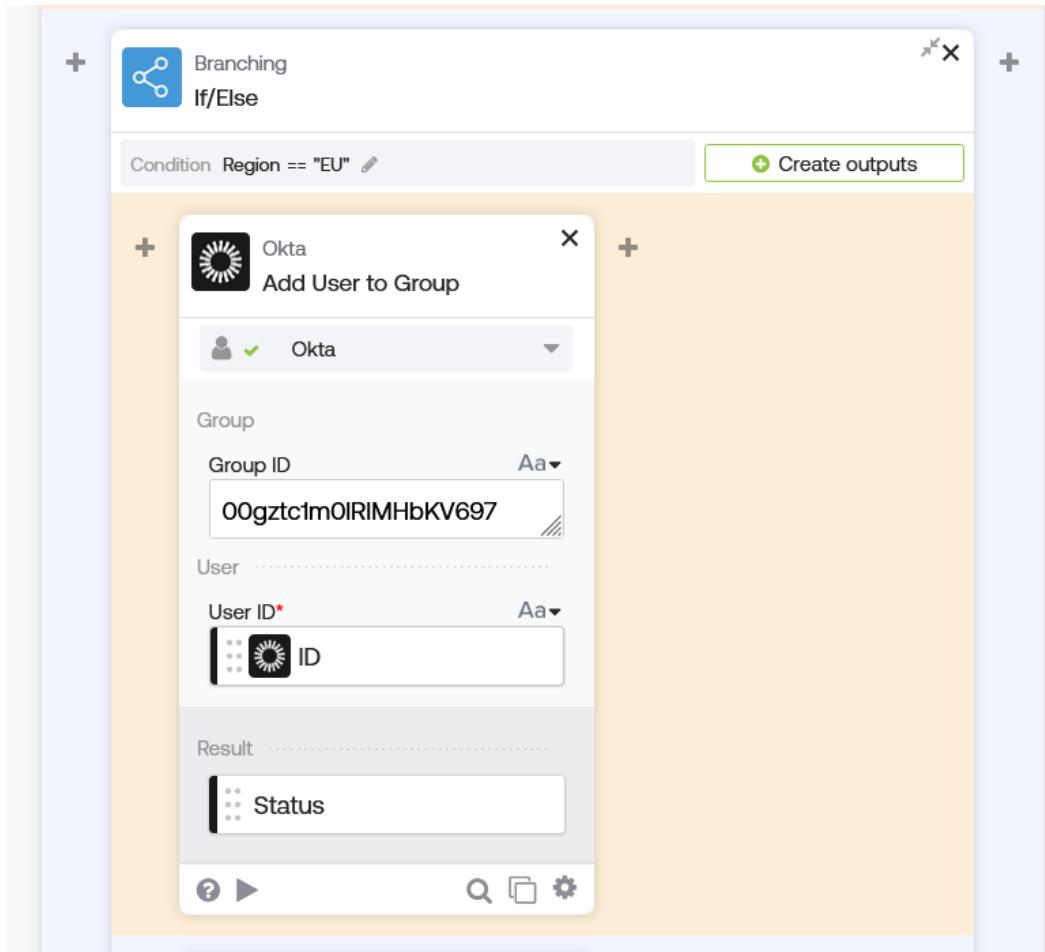
→ Add User to Group: Local - Group (Group ID: 00gzunzfztvJbC1kt697)





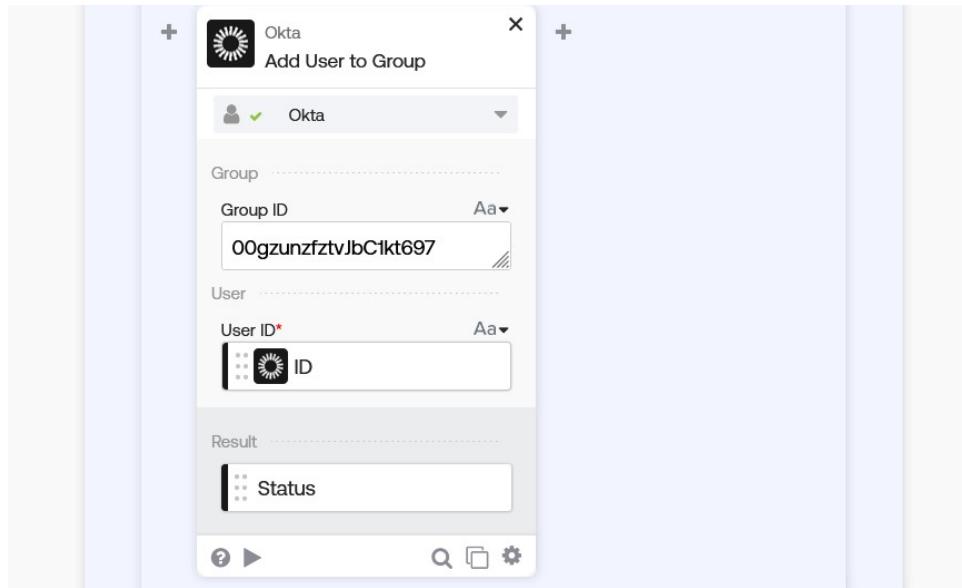
## EU Region Branch

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.



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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 	<input style="border: 1px solid #ccc; padding: 5px; width: 150px; height: 30px; border-radius: 5px; font-size: 10px; font-weight: bold; text-decoration: none; color: inherit; background-color: inherit;" type="button" value="User"/>
First name	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text"/>
Last name	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text"/>
Username	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text"/> Must be an email
Primary email	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text"/>
Secondary email (optional)	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text"/>
Groups (optional)	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text"/>
Region	<input style="width: 150px; height: 30px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 10px;" type="text" value="US"/> Default value
Activation	<input style="border: 1px solid #ccc; padding: 5px; width: 150px; height: 30px; border-radius: 5px; font-size: 10px; font-weight: bold; text-decoration: none; color: inherit; background-color: inherit;" type="button" value="Activate now"/>
<input type="checkbox"/> 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 shows the Okta user profile for 'camlin sharpner'. At the top, it displays the name 'camlin sharpner' and the email 'dicaf67177@desiys.com'. Below this are two buttons: 'Reset or Remove password' and 'More Actions'. Underneath are links for 'User Change', 'Active', and 'View Logs'. A navigation bar below these links includes tabs for 'Applications', 'Groups' (which is selected), 'Profile', 'Devices', 'Admin roles', and 'Pre-enrolled authenticators'. The 'Groups' tab section is titled 'Groups' and contains a search bar with the placeholder 'Type group to add...'. It lists two groups: 'Everyone' (with a note 'All users in your organization') and 'US - Group' (with a note 'US Group to add US Users • Manually managed').

## 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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