

Lab 7-2: Import Users Via an API Integration

Objective	Demonstrate how to leverage an API integration with an application to import existing users in bulk who need the application assignment in Okta.
Scenario	After Salesforce Provisioning was enabled, and lifecycle management events such as Create and Update have been enabled and tested, the Okta admin notices updates are not occurring for Ana Walters.
Duration	10-15 minutes

Note: Importing is one way to solve for this Provisioning related issue. An Okta Admin could remove the existing user assignment for Ana Walters and then reassign her the application in Okta, thus establishing the API integration during the new assignment. However, when this issue exists for user in bulk (perhaps hundreds or thousands) the “rip & replace” procedure is not recommended. Importing is considered the better solution in this case.

Before You Start

Make sure:

- **You have completed Labs 5-2, 6-1 & 7-1**

Import & Assign the Salesforce Application to an Ana Walters to Include Provisioning

1. In the Okta Admin console, navigate to **Application > Applications**.
2. Select **Salesforce.com** from the list of integrated applications.
3. On the **Assignments** tab, click on the **pencil icon** next to **Nate Abbott's** name.
4. Note the **External Id** value is populated. This value is required in order to link this user account to another account in the Salesforce application; it is the link to Nate's Salesforce assignment in Okta to his account in Salesforce.
5. Close the **Edit User Assignment** window for Nate Abbott.
6. On the **Assignments** tab, click on the **pencil icon** next to **Ana Walters'** name.
7. Note Ana Walters' application assignment in Okta does NOT have an External Id value. Ana's assignment in Okta is NOT linked to her account in Salesforce via the API.
8. Close the **Edit User Assignment** window for Ana Walters.
9. Click the **Import** tab.

10. Click the **Import Now** button.
11. After the import has completed, note in the "14 users scanned!" alert contains a note: **1 users removed**.
12. Click **OK**
13. Click the **Assignments** tab.
14. Note that **Ana Walters** is no longer assigned the Salesforce application. This is due to the enabled Provisioning now taking over and removing any "unrecognized" assignments; in other words it removed any users without valid External Id's.
15. Click the **Import** tab, and then click the **Import Now** button again.
16. In the "13 users scanned!" alert, note: **1 new users imported**
17. Click **OK**
18. Note the **1 PARTIAL Okta user match found** entry for Ana Walters.
19. Click the select checkbox on the far right to selected Ana's record.
20. Click **Confirm Assignments 1** button in the upper right corner.
21. In the "Confirm Imported User Assignments" window, click the **Auto-activate users after confirmation** check box.
22. Click **Confirm**.
23. From the **Import** tab, click the **Clear Unconfirmed Users** button.
24. In the "Clear unconfirmed users?" window, click **Clear import results**.
25. Click on the **Assignments** tab.
26. Note Ana Walters has been reassigned.
27. Click on the **pencil icon** next to **Ana Walters'** name.
28. Note that Ana Walters account now has an External Id value.
29. Close the Edit User Assignment window.
30. You should now be able to **Update** or **Deactivate** Ana's account from Active Directory and see the changes reflected in Salesforce after completing an import between Okta and AD.