

**In this guide, you will learn how to onboard users to Okta using the Okta Dashboard, set their password to require a change on first login, import a user into Okta via a CSV file, create a group, and add users to the group both manually and by rule.**

Add a User via the Portal

- Log in as Super admin
- From the portal, click on **Directory** and then **People**
- Click **Add Person**

## EMMANUEL SESAY OKTA JR. ENGINEER GUIDE P1

The screenshot shows the Okta Admin console interface. The left sidebar contains a navigation menu with items: Dashboard, Directory, People, Groups, Devices, Profile Editor, Directory Integrations, Profile Sources, Customizations, Applications, Security, Workflow, Reports, and Settings. The 'People' item is highlighted. The main content area shows the 'People' section with a search bar, a status filter set to 'All', and a table of users. The table has columns for 'Person & username', 'Primary email', and 'Status'. Two users are listed: 'User Admin' and 'Super Admin', both with 'Active' status.

Person & username	Primary email	Status
User Admin user.admin@oktacertified.com	user.admin@oktacertified.com	Active
Super Admin super.admin@oktacertified.com	super.admin@oktacertified.com	Active

- Populate the following fields for user: First name: **Emmanuel**, Last Name: **Sesay**, Primary email:

[emmanuel.sesay@myyahoo.com](mailto:emmanuel.sesay@myyahoo.com), Department: **Contractors** Preferred Name: **Eman**

- Activation: **Active now**, Check **Activate now**, Enter password **@Testing123**, Uncheck **User must change password on first login**
- Click **save**

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The screenshot shows the Okta Admin console with the 'Add Person' modal open. The form contains the following fields and options:

- User type:** User (dropdown)
- First name:** Emmanuel
- Last name:** Sesay
- Username:** emmanuel.sesay@myyahoo.com
- Primary email:** emmanuel.sesay@myyahoo.com
- Secondary email (optional):** (empty field)
- Groups (optional):** You haven't added any groups
- Activation:** Activate now (dropdown)
- Password options:**
  - ☒ I will set password (indicated by a red arrow)
  - ☐ User must change password on first login
- Buttons:** Save (indicated by a red arrow), Save and Add Another, Cancel

Below the password options, there is a link: [Do not send unsolicited or unauthorized activation emails. Read more](#)

- Confirm that the new user is listed on the **People** page

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## OKTA JR. ENGINEER GUIDE P1

### People

[Help](#)

[Add person](#) [Reset passwords](#) [More actions](#)

<div>Search for users by first name, primary email or username</div> <div>Advanced search</div>		
<div>Status All</div> <div>Showing 3 of 2</div>		
Person & username	Primary email	Status
<a href="#">Emmanuel Sesay</a> emmanuel.sesay@myyahoo.com	emmanuel.sesay@myyahoo.com	Active
<a href="#">User Admin</a> user.admin@oktacertified.com	user.admin@oktacertified.com	Active
<a href="#">Super Admin</a> super.admin@oktacertified.com	super.admin@oktacertified.com	Active

- Assure user can log in

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- Click **Directory**, **Profile Editor**, then **okta user**

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Preview Sandbox: This is a preview of changes for an upcoming release. See a problem? [File a case](#) or visit our [support site](#).

Scheduled Maintenance: Okta will be performing planned maintenance on our Org Creator Manager Database infrastructure. More info [here](#).

okta

Search for people, apps and groups

### Profile Editor

Help

Users Groups

#### Users

Search...

Create Okta User Type

Filters	Profile	Type
All	User (default)	Okta
Okta	user	

- Click **Add Attribute**, Display Name **Preferred Name**, Variable name **preferredName**, check **Read-Write**, click **Save**

### Attributes

+ Add Attribute

Filters	Display Name	Variable Name	Data type	Attribute Type
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## Add Attribute

Data type

string

Display name ?

Preferred Name

Variable name ?

preferredName

example, a title



Read-Write

Users can view the attribute and edit attribute properties. Select this option to allow users to update attribute properties. For example, a phone number



Save

Save and Add Another

Cancel

- Click **Directory**, click **People**, then username **Emmanuel**

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Dashboard

Directory

People

Groups

Devices

Profile Editor

Directory Integrations

Profile Sources

Customizations

Applications

Security

Workflow

Reports

Settings

Preview Sandbox: This is a preview of changes for an upcoming release. See a problem? [File a case](#) or visit our [support site](#).

Scheduled Maintenance: Okta will be performing planned maintenance on our Org Creator Manager Database infrastructure. More info [here](#).

Okta

Search for people, apps and groups

People

Help

Add person Reset passwords More actions

Search for users by first name, primary email or username

Advanced search

Status All Showing 3 of 3


Person & username	Primary email	Status
Emmanuel Sesay emmanuel.sesay@myyahoo.com	emmanuel.sesay@myyahoo.com	Active

- Click **Profile**, click **Edit**, Preferred Name **Eman**, then click **Save**



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?

user.admin@oktac...  
org1-propp-f65f

Q

Search for people, apps and groups

Emmanuel Sesay

emmanuel.sesay@myyahoo.com

Reset or Remove password

More Actions

User

Active

View Logs

Applications

Groups

Profile

Devices

Admin roles

Attributes

Username

login

emmanuel.sesay@myyahoo.com

⇒

Edit

Profile

A profile is a collection of attributes that describe a user in Okta. Some apps and directories can sync attributes with Okta.

Organization

organization

Division

division

Department

department

ManagerId

managerId

Manager

manager

Preferred Name

preferredName

Eman

⇒

Save

Cancel

Add a User via the Portal and set password to be changed on first log in.

Steps below:

- From the super admin portal
- Click on **Directory** and then **People**
- Click **Add Person**


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The screenshot shows the Okta Admin console interface. The left sidebar contains a navigation menu with items: Dashboard, Directory (highlighted with a red arrow), People (highlighted with a red arrow), Groups, Devices, Profile Editor, Directory Integrations, Profile Sources, Customizations, Applications, Security, Workflow, Reports, and Settings. The main content area displays the 'People' page. At the top, there are two banners: 'Preview Sandbox' and 'Scheduled Maintenance'. Below these, the 'Okta' logo and user profile are visible. A search bar is present with the text 'Search for people, apps and groups'. The 'People' section title is followed by a 'Help' link. Below the title, there are three buttons: 'Add person' (highlighted with a red arrow), 'Reset passwords', and 'More actions'. A search bar for users is also present. Below the search bar, there is a 'Status' dropdown menu set to 'All' and a 'Showing 2 of 2' indicator. A table lists the users:

Person & username	Primary email	Status
<a href="#">User Admin</a> user.admin@oktacertified.com	user.admin@oktacertified.com	Active
<a href="#">Super Admin</a> super.admin@oktacertified.com	super.admin@oktacertified.com	Active

- Populate the following fields for user: First name: **Deejay**, Last Name: **Manny**, Primary email: [bookdjgg@gmail.com](mailto:bookdjgg@gmail.com)
- Activation **Activate now**, check **I will set password**, password **@Testing123**, check **User must change password on first log in**
- Click **Save**

## Add Person

User type 

User

First name

Deejay

Last name

Manny

Username

bookdjgq@gmail.com

Primary email

bookdjgq@gmail.com

Secondary email (optional)

Groups (optional)

You haven't added any [groups](#)

Activation

Activate now



I will set password

.....



User must change password on first login

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

- Confirm that the new user is listed on the **People** page

## People

[? Help](#)

[+ Add person](#)

[↻ Reset passwords](#)

[More actions ▾](#)

Search for users by first name, primary email or username



[Advanced search ▾](#)

Status

All ▾

Showing 4 of 3 [i](#)

Person & username

Primary email

Status

[Deejay Manny](#)

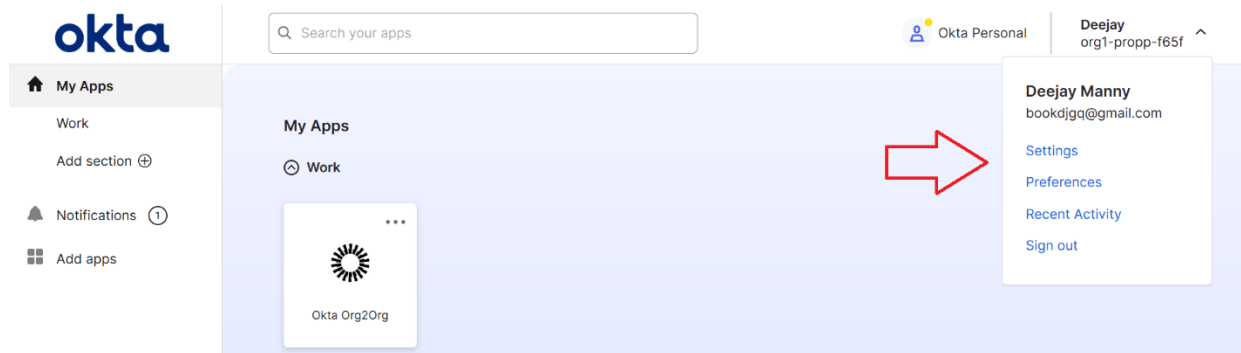
bookdjgq@gmail.com

bookdjgq@gmail.com

Password  
expired

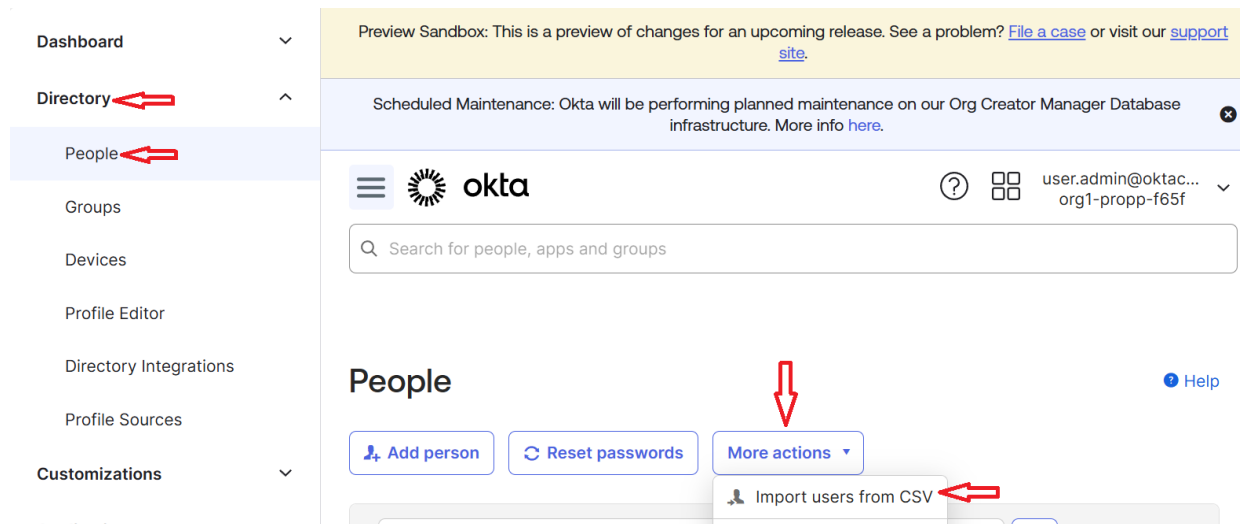
- Assure user can log in
- **Note:** I logged in as the user and changed password on first log in.

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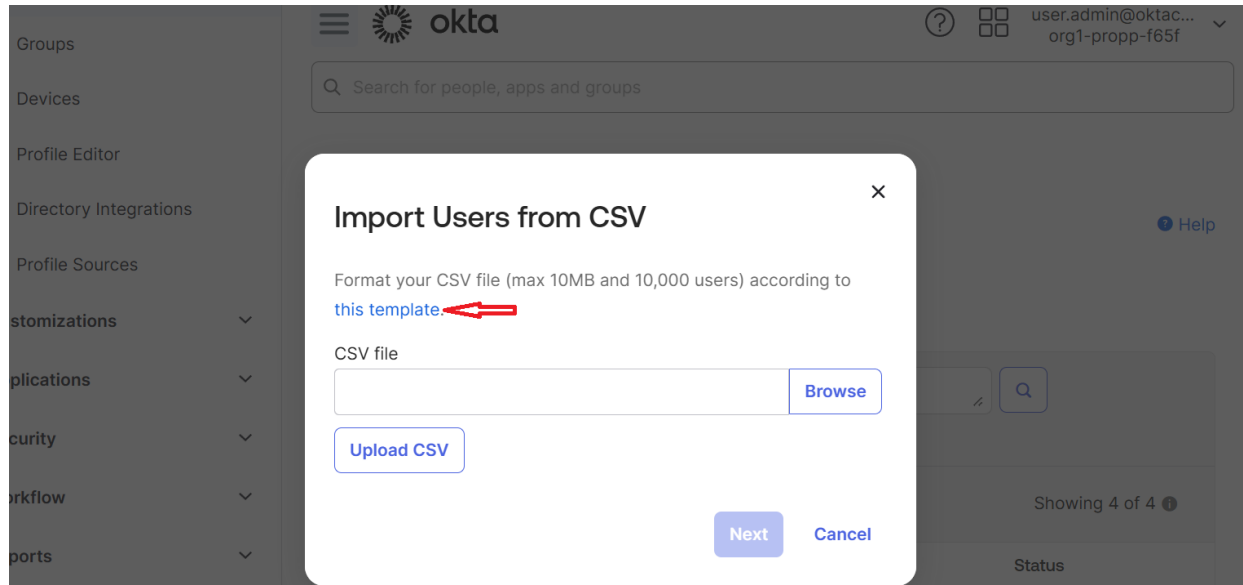
Import a user into Okta, using a CSV file. Steps below:

- From the super admin portal
- Click **Directory**, click **People**, click **More actions**, then **Import users from csv**



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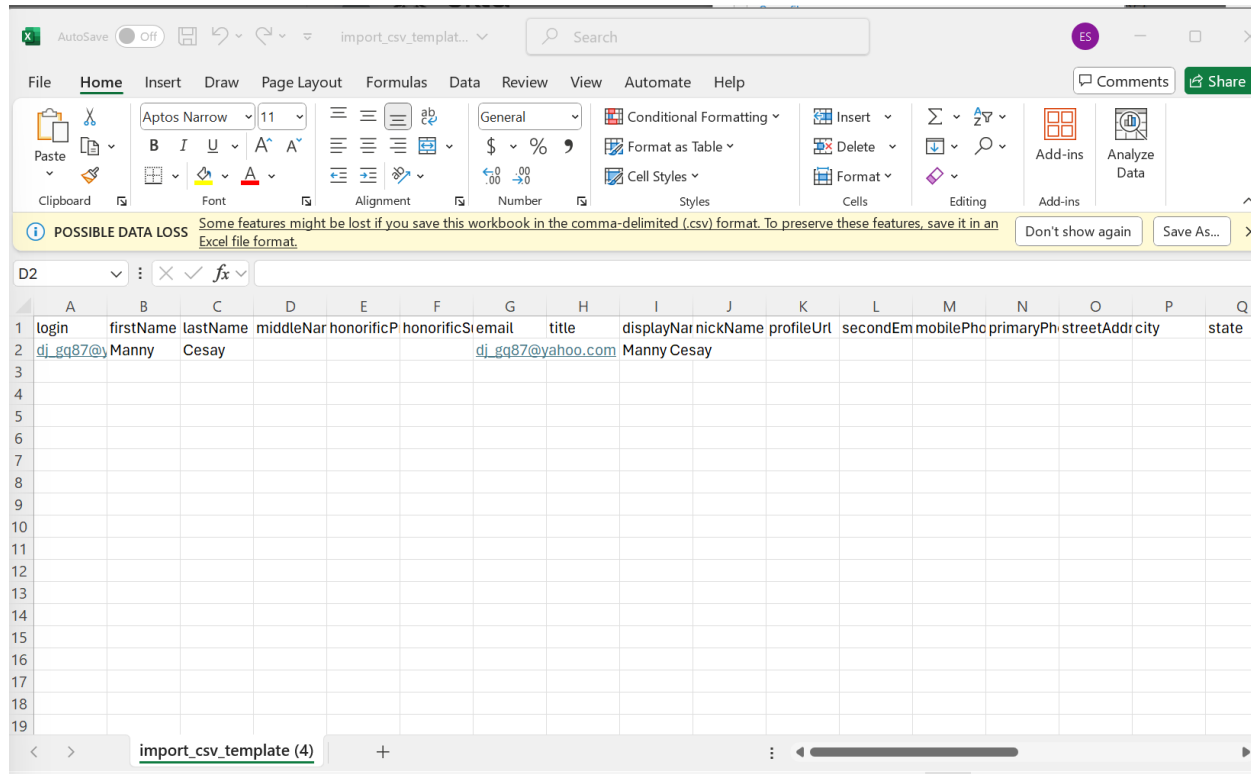
- Download the CSV template



- Populate the following fields for user: **login:** dj\_gq87@yahoo.com **firstname:** Manny **lastname:** cesay, **email:** dj\_gq87@yahoo.com **displayname:** Manny Cesay

## EMMANUEL SESAY

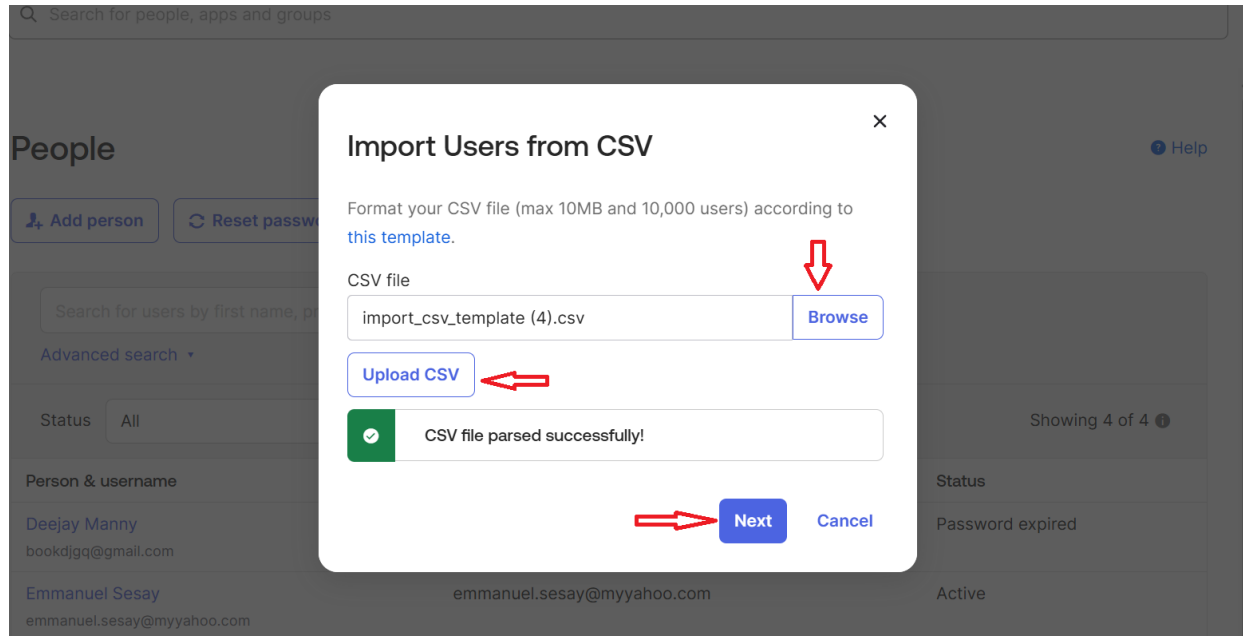
### OKTA JR. ENGINEER GUIDE P1



- Click **Browse** then select saved cvs file, click **Upload CSV**
- Confirm successful validation and then click **Next**

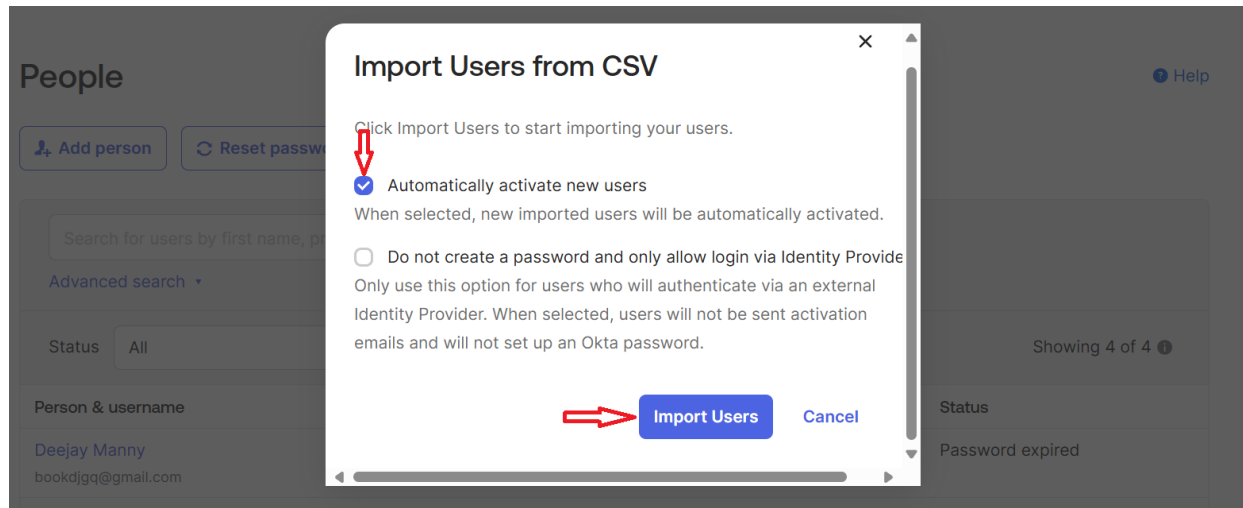


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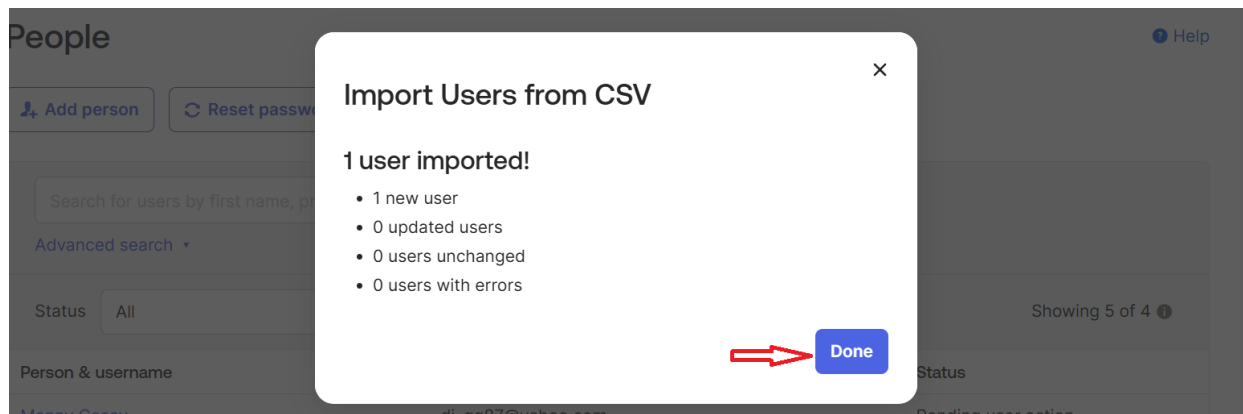


- Check **Automatically activate new users**, Click **Import Users**

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- Click **Done**



- Confirm that the new user is listed on the **People** page

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### People

[Help](#)[Add person](#)[Reset passwords](#)[More actions](#)[Advanced search](#)

Status

All

Showing 5 of 4

Person & username	Primary email	Status
<a href="#">Manny Cesay</a> dj_gq87@yahoo.com	dj_gq87@yahoo.com	Pending user action
<a href="#">Deejay Manny</a> bookdjgq@gmail.com	bookdjgq@gmail.com	Password expired

Create a group, Add user to group by rule, And also add user to group manually. Steps blow:

- From the portal, click on **Directory**, Click on **Groups** and then **Add group**

okta

Search for people, apps and groups

user.admin@oktac...  
org1-propp-f65f

Dashboard

Directory

People

Groups

Devices

Profile Editor

Directory Integrations

### Groups

All Rules

Search by group name

Advanced search

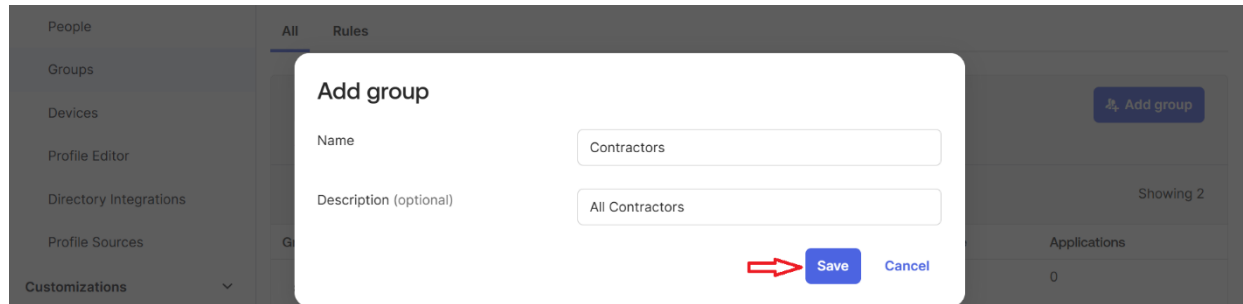
Group source type All

Showing 2

Add group

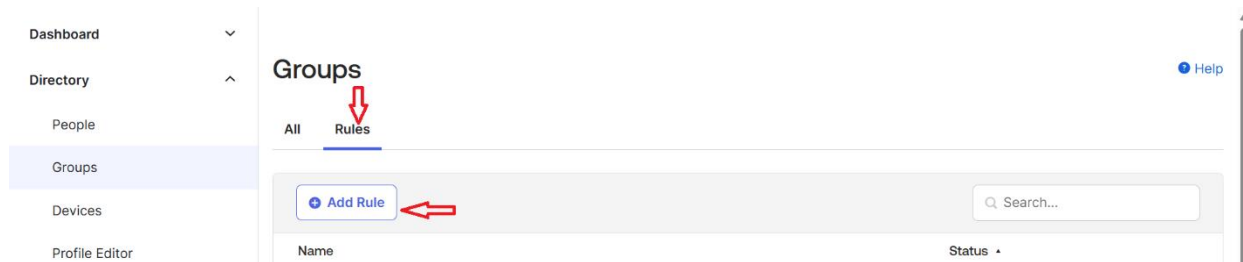
- Name: **Contractor**, Group Description: **All contractors**, Click on **Save**

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The screenshot shows the 'Add group' modal in the Okta admin console. The 'Name' field contains 'Contractors' and the 'Description (optional)' field contains 'All Contractors'. A red arrow points to the 'Save' button.

- click on **Rules**, then click **Add Rule**



The screenshot shows the 'Groups' page in the Okta admin console. The 'Rules' tab is selected. A red arrow points to the 'Add Rule' button in the 'Rules' tab. Another red arrow points to the 'Add Rule' button in the 'Groups' tab.

- Name: **Contractors Rule**, Select **department | string**, Assign to **All Contractors**, Click on **save**

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**Edit Rule**

Name: Contractors Rule

IF: ☒ Use basic condition ☐ Use Okta Expression Language (advanced)

User attribute: department | string Equals Contractors

THEN: Assign to Contractors

EXCEPT: The following users

Preview: Enter an Okta user to preview this rule

Save Cancel

- Click Action, then click activate

## Groups

All Rules

[Add Rule](#) Search...

Name	Status	Actions
Contractors Rule	Inactive	<div><div>Edit</div><div>Activate</div><div>Rule will evaluate once on all users and then trigger on subsequent user profile updates</div><div>Delete</div></div>

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- Confirm user are added to group
- Click **All**, then click **Contractors**

The screenshot displays the Okta Groups management interface. The left sidebar shows the navigation menu with 'Groups' selected. The main content area is titled 'Groups' and has two tabs: 'All' (selected) and 'Rules'. A red arrow points to the 'All' tab. Below the tabs, there is a search bar and an 'Add group' button. A table lists the groups, with 'Contractors' highlighted and a red arrow pointing to it. The table has columns for 'Group name', 'People', and 'Applications'. Below the table, there is a 'Back to Groups' link and the 'Contractors' group details. The 'Contractors' group is shown with its name, a description 'All Contractors', and creation/modification dates. Below this, there are tabs for 'People', 'Applications', 'Profile', 'Directories', and 'Admin roles'. The 'People' tab is selected, showing a search bar and an 'Assign people' button. A table lists the members of the group, with 'Emmanuel Sesay' highlighted and a red arrow pointing to it. The table has columns for 'Person & username', 'Status', and 'Managed'. A red arrow also points to the 'Managed' column value 'By rule Contractors Rule'.

Okta

Search for people, apps and groups

user.admin@oktac...  
org1-propp-f65f

Dashboard

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Customizations

Groups

Search by group name

Advanced search

Group source type: All

Showing 3

Group name	People	Applications
Contractors	1	0
All Contractors		

← Back to Groups

Contractors

Actions

All Contractors

Created: 8/31/2024 Last modified: 8/31/2024 View logs

People Applications Profile Directories Admin roles

People

Search for users by first name, primary email or username

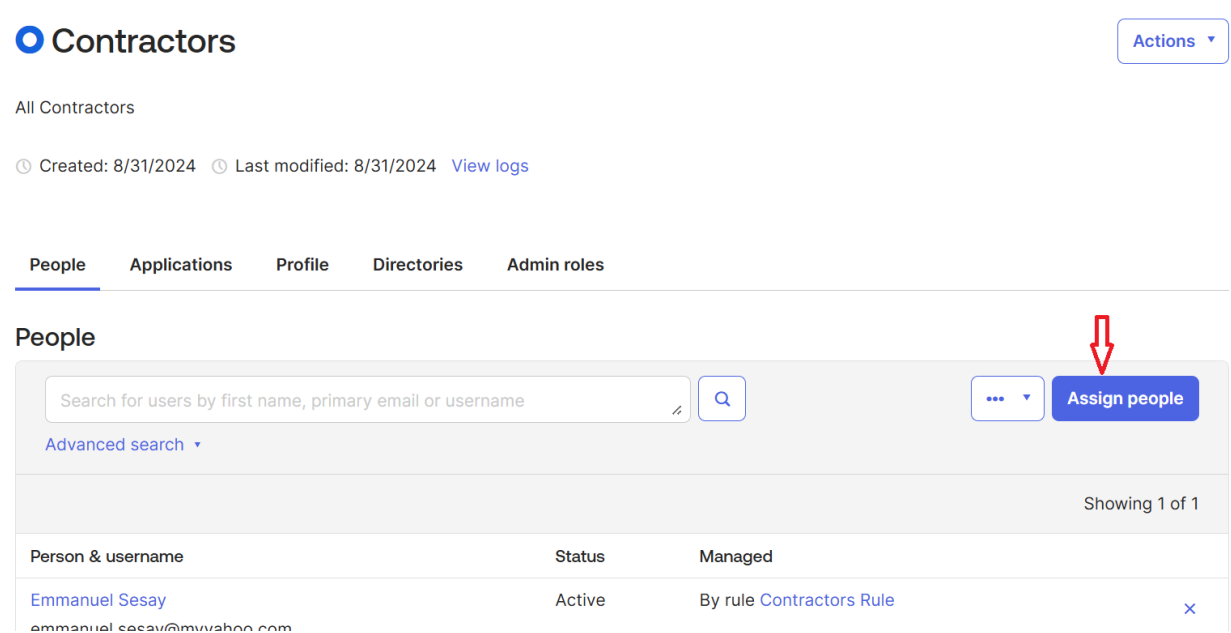
Assign people

Showing 1 of 1

Person & username	Status	Managed
Emmanuel Sesay	Active	By rule Contractors Rule
emmanuel.sesay@myyahoo.com		

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- Click on **Assign people**



The screenshot shows the Okta Contractors interface. At the top, there's a header with the Okta logo and the word 'Contractors'. Below this, there's a section for 'All Contractors' with a timestamp 'Created: 8/31/2024' and 'Last modified: 8/31/2024', and a link to 'View logs'. A navigation bar contains tabs for 'People', 'Applications', 'Profile', 'Directories', and 'Admin roles'. The 'People' tab is selected. Below the tabs, there's a search bar with the placeholder text 'Search for users by first name, primary email or username'. To the right of the search bar is a magnifying glass icon and a dropdown menu. A red arrow points to the 'Assign people' button, which is located next to the dropdown menu. Below the search bar, there's a link for 'Advanced search'. A table shows the results, with columns for 'Person & username', 'Status', and 'Managed'. The table contains one entry for 'Emmanuel Sesay' with status 'Active' and managed by 'Contractors Rule'. A 'Showing 1 of 1' indicator is present above the table. A close button 'x' is visible in the bottom right corner of the table area.

Contractors

All Contractors

Created: 8/31/2024 Last modified: 8/31/2024 [View logs](#)

People Applications Profile Directories Admin roles

People

Search for users by first name, primary email or username

Advanced search

Showing 1 of 1

Person & username	Status	Managed
<a href="#">Emmanuel Sesay</a> emmanuel.sesay@mvvahoo.com	Active	By rule <a href="#">Contractors Rule</a>

- Click on **+** to add user, then click **Done**

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Dashboard

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Customizations

#### Assign people to Contractors

[Advanced search](#)

Showing 4

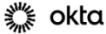
Person & username	Status	Managed
<a href="#">Manny Cesay</a> dj_gq87@yahoo.com	Pending user action	Manually +
<a href="#">Deejay Manny</a> bookdjgq@gmail.com	Password expired	Manually +
<a href="#">Super Admin</a> super.admin@oktacertified.com	Active	Manually +

- Confirm user is added to group



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Search for people, apps and groups

user.admin@oktac...  
org1-propp-f65f

Dashboard

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Security

Workflow

Reports

Settings

Back to Groups

Contractors

All Contractors

Created: 8/31/2024 Last modified: 8/31/2024 View logs

PeopleApplicationsProfileDirectoriesAdmin roles

People

Search for users by first name, primary email or username

Assign people

Advanced search

Showing 2 of 2

Person & username	Status	Managed
Deejay Manny bookdjgq@gmail.com	Password expired	Manually
Emmanuel Sesay emmanuel.sesay@myyahoo.com	Active	By rule Contractors Rule

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