

A Configuration Guide explains what users must do in Okta to configure provisioning for your app. As part of developing a Cloud Provisioning Connector, create a configuration guide using the following process within the CPC Program Lifecycle.

1. Create a configuration guide in pdf format while developing the CPC integration.
2. Post the guide on a webpage and provide the link to Okta as part of the **Review with Okta submission** stage. Okta will check for general adherence to the configuration guide instructions. The webpage should include the following disclaimer: *This integration with Okta is currently under development and is not available to customers yet. Contact <contact info> to learn more.*
3. Once the connector is approved for the **Test with Customers** stage, make the guide available to those customers. The webpage should include the following disclaimer: *This integration with Okta is currently available only to a limited number of customers. Contact <contact info> to learn more.*
4. Once the connector is Okta Verified, then make the guide link public or customer-accessible without any disclaimers.

For an example of a detailed configuration guide, see [Configuring Provisioning for Concur](#). All configuration guides must include the following sections. Please include any screenshots from your app that can assist the user during setup.

Features

What provisioning features does the app support? Are there any restrictions?

Restriction example: Okta cannot push profile updates for Group Owner, and an error is thrown. This is an API limitation.

Requirements

Are there any prerequisites, such as a particular version, contacting your organization's support.

Requirements example: A specific account plan or setting needs to be enabled on the application side for silent activation when using SAML as a SSO mode with provisioning.

Step-by-step Configuration Instructions

Note: This Configuration Guide is opened from the Provisioning tab. The General Settings and Sign On settings have already been configured.

This is the bulk of the doc with steps and screenshots. Add text explaining what a certain setting means, if it is something specific to the application.

Add any best practices for a step with the step, such as guidance on setting mappings for attributes, especially required attributes that do not have a default mapping.

Best practice example: External ID is a required attribute, but does not have a default mapping because some customers prefer to set it to EmployeeNumber, and others like to set it to emailAddress. Assign the mapping to the correct value for your organization.

Schema Discovery

This is an optional section. The schema discovery section in the sample guide for the Concur app is an example.

Troubleshooting and Tips

This is an optional section. Only include it if there are known issues or best practices that apply to the entire configuration. The bulk of best practices should be included with the steps.