Oktane20: Use Workflows to Automate Identity-Specific Tasks without Requiring Code

Lab Guide

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Use Workflows to Automate Identity-Specific Tasks without Requiring Code

Our Story

Welcome to Okta Ice! We are an ice cream company which has been in business for over 15 years. In the past year, Okta Ice has expanded substantially. You recently joined Okta Ice's Sales department and you will need access to the Salesforce application to begin your onboarding with the company.

Organization Configurations

Okta User Accounts & Group Memberships

Okta Administrators	Okta Mastered Users	Department
Class Admin (oktatraining@okta.com)	Mayer Hay (Mayer.Hay@oktaice.com)	Sales
	Sugge Fitz (Sugge.Fitz@oktaice.com)	Management
	Wells Betonia (Wells.Betonia@oktaice.com)	IT

Lab: Access Your Okta Organization

Objective	Sign into your Okta organization.
Duration	5 minutes

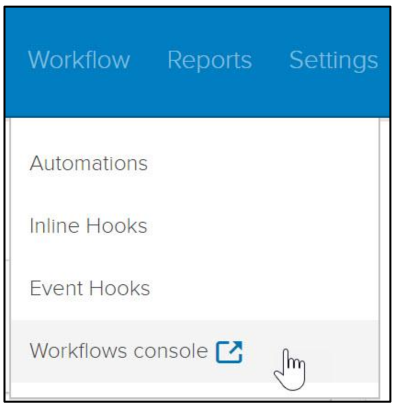
1. Open a browser window and navigate to your Okta organization.
   For example, https://**oktane20####.oktapreview.com** - where **####** is your Okta org number.
2. Sign into your Okta Org with the Class Admin (**oktatraining)** administrator account.
   - Username**: oktatraining**
   - Password: **Tra!nme4321**
3. Choose and answer a forgot password question.
4. Choose a security image.
5. Click **Create My Account**.

Lab: Connect Your Okta Org to the Workflows Console

Objective	The first time you launch Okta Workflows, you should connect your Okta account.
Scenario	A connection refers to a unique access level for a specific user to that application. To send data to and from an application, you need to establish a connection to that application.
Duration	5-10 minutes

Access Okta Workflows

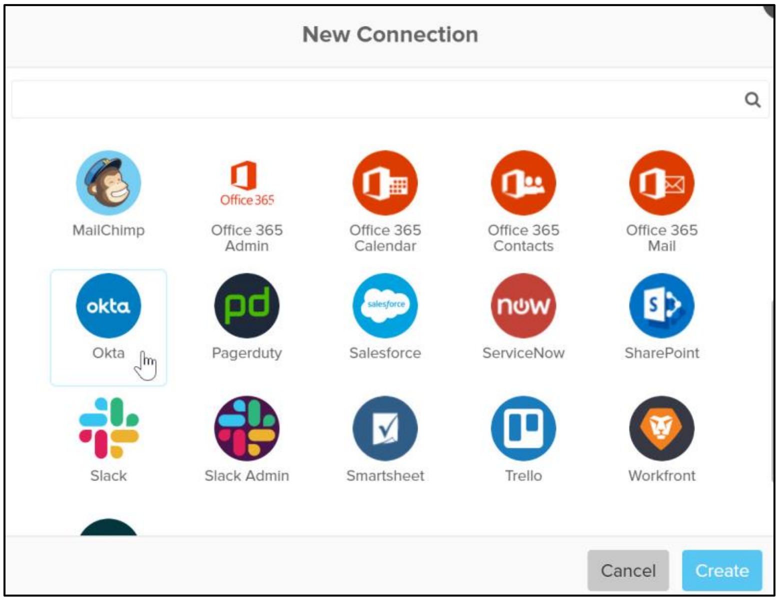
1. In your Okta org, click the **Admin** button if applicable.
2. Navigate to the Workflow menu and scroll down and click on **Workflows console**.



3. Fill in your Oktaice Ice name, job title and company:
   - **Name:** Okta Training
   - **Job Title:** Okta Administrator
   - **Company:** Okta Ice
4. Click **I accept**.
5. The Workflows console will open within another tab in your browser.

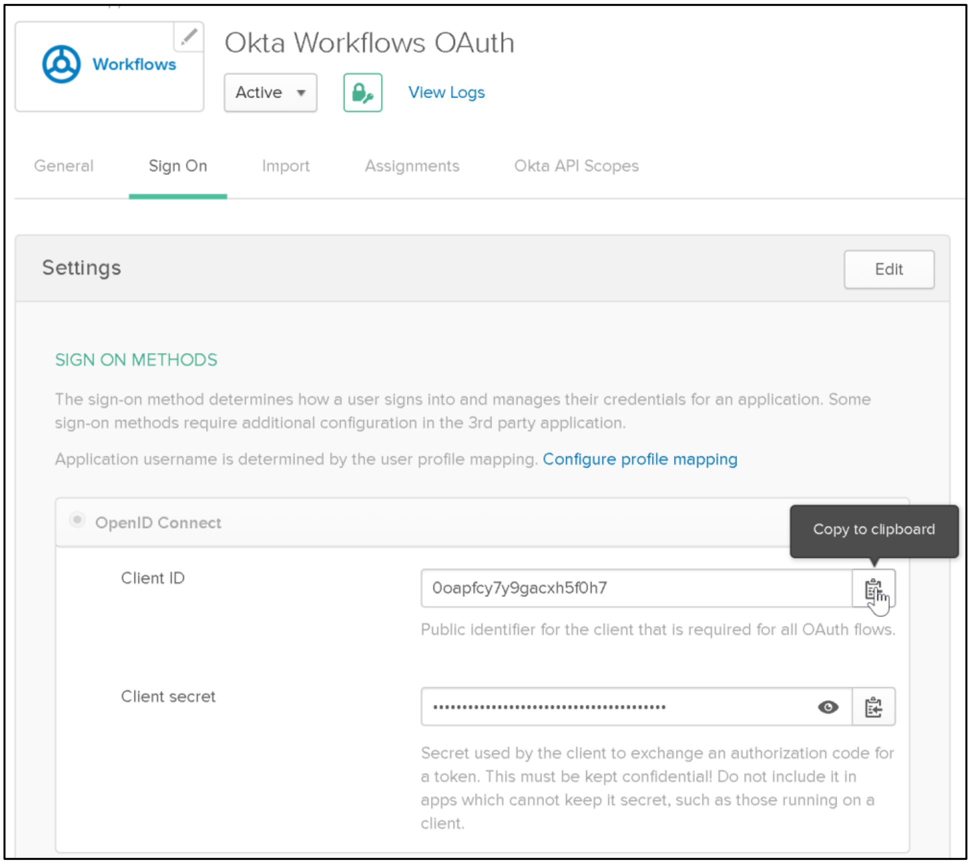
Create an Okta Connection

1. Click **Settings**. Click the **+New Connection** button.
2. Scroll down and click on the Okta circle.



3. You will now be prompted to enter the Connection Nickname, Domain, Client ID, and Client Secret
6. For Connection Nickname, enter **Oktane**.
7. For the Domain, enter your Okta org domain. For example, if your Okta org URL is **https://oktane20####.oktapreview.com**, enter **oktane20####.oktapreview.com**.
8. For the Client ID and Client Secret, you will need to navigate back to the tab displaying your Okta org.
9. Navigate to the Applications menu and click **Applications**.
10. Click on the **Okta Workflows OAuth** application.
11. You will land on the Assignments tab. Click on the **Sign On** tab to the left.

12. Copy the **Client ID** and paste it in the Client ID field of the Connection window in your Workflows Console.



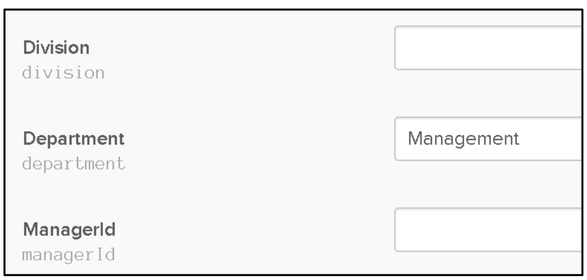
13. Copy the **Client Secret** from the Sign On tab of your Okta Workflows OAuth app and paste it in the Client Secret field of the Connection window in your Workflows Console.
14. In your Workflows Console, click **Create**.

Lab: Create a User in Salesforce using a Workflows Template

Objective	After you turn on this flow, you can create a complete Salesforce user profile simply by assigning a user to the Salesforce app in Okta. The flow is triggered when you make either an individual or a group assignment.
Scenario	Without configuring provisioning options in Salesforce, this flow will create a user in Salesforce the second they are assigned the Salesforce application.
Duration	5-10 minutes

Update Department for Sugge Fitz

1. In the Okta Admin app, navigate to **Directory** > **People**.
2. Click on **Sugge Fitz**.
3. Select the **Profile** tab and select **Edit**.
4. Scroll down to the **Department** field and change **Sales** to **Management** as the department.
   Note: This will be used in the workflow to define the assigned Salesforce license. This field will match the case sensitivity of the field in the workflow.



5. Click **Save**.

Verify Departments for Mayer Hay and Wells Betonia

1. In the Okta Admin app, navigate to **Directory** > **People**.
2. Click on **Mayer Hay**.
3. Select the **Profile** tab and scroll down and next to **Department** field and verify she is associated with the **Sales** department.
   Note: This will be used in the workflow to define the assigned Salesforce license. This field will match the case sensitivity of the field in the workflow.
4. Navigate to **Directory** > **People**.
5. Click on **Wells Betonia**.

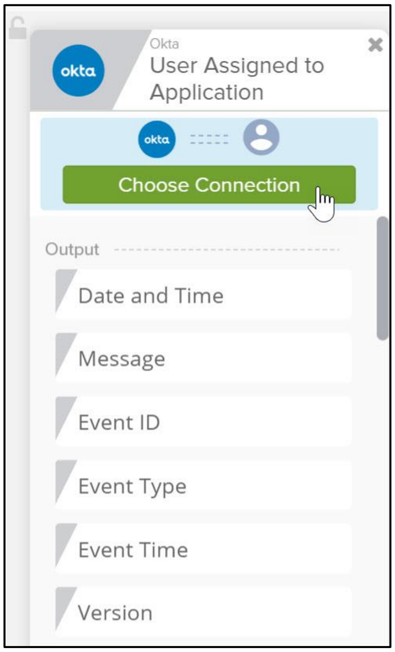
6. Select the **Profile** tab and scroll down and next to **Department** field and verify she is associated with the **IT** department.
   Note: This will be used in the workflow to define the assigned Salesforce license. This field will match the case sensitivity of the field in the workflow.

Authorize a Salesforce Connection

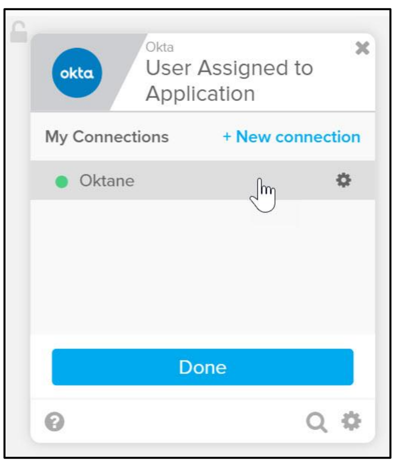
1. In the Workflows Console, click **Settings**.
2. Click on the **+ New Connection** button.
3. Click on the Salesforce circle.
4. For Connection Nickname, enter **Salesforce**.
5. Select **Sandbox** as your Environment.
6. Click **Create**.
7. A pop-up window will appear. Enter your Salesforce Username and Password.
   Username: **oktatraining@okta.com.sandbox###**
   Password: **Tra!nme4321**
8. A pop up window will appear stating that Okta Preview Workflows is asking for access. Click **Allow**.
9. The Salesforce connection should appear and towards the right you should see a green checkmark denoting that the connection is healthy.
   Note: The Salesforce application has been pre-configured in the Okta org with SAML only. Provisioning is not enabled since workflows will be used to perform provisioning.

Edit Create User in Salesforce Workflow

1. In the Workflows Console, click **Home**.
2. Click on the **[Salesforce] Create User in Salesforce (Basic)** workflow template.
3. On the User Assigned to Application event card, click on **Choose Connection**.

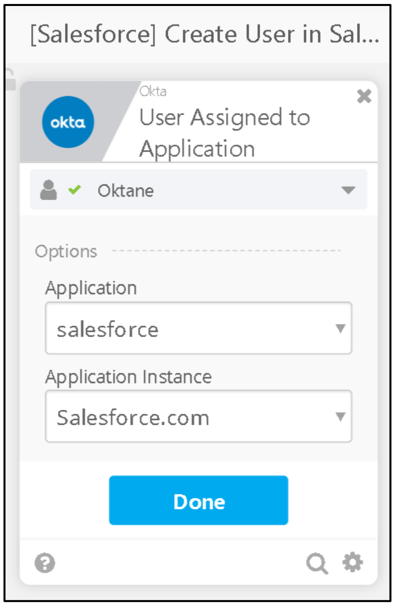


4. Click on the **Oktane** connection.

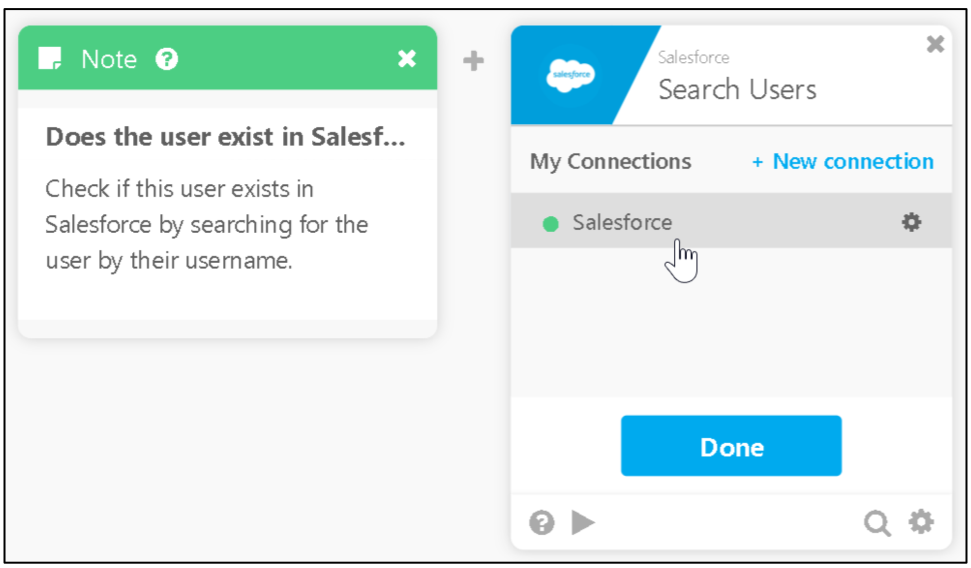


5. Click on **Options**.

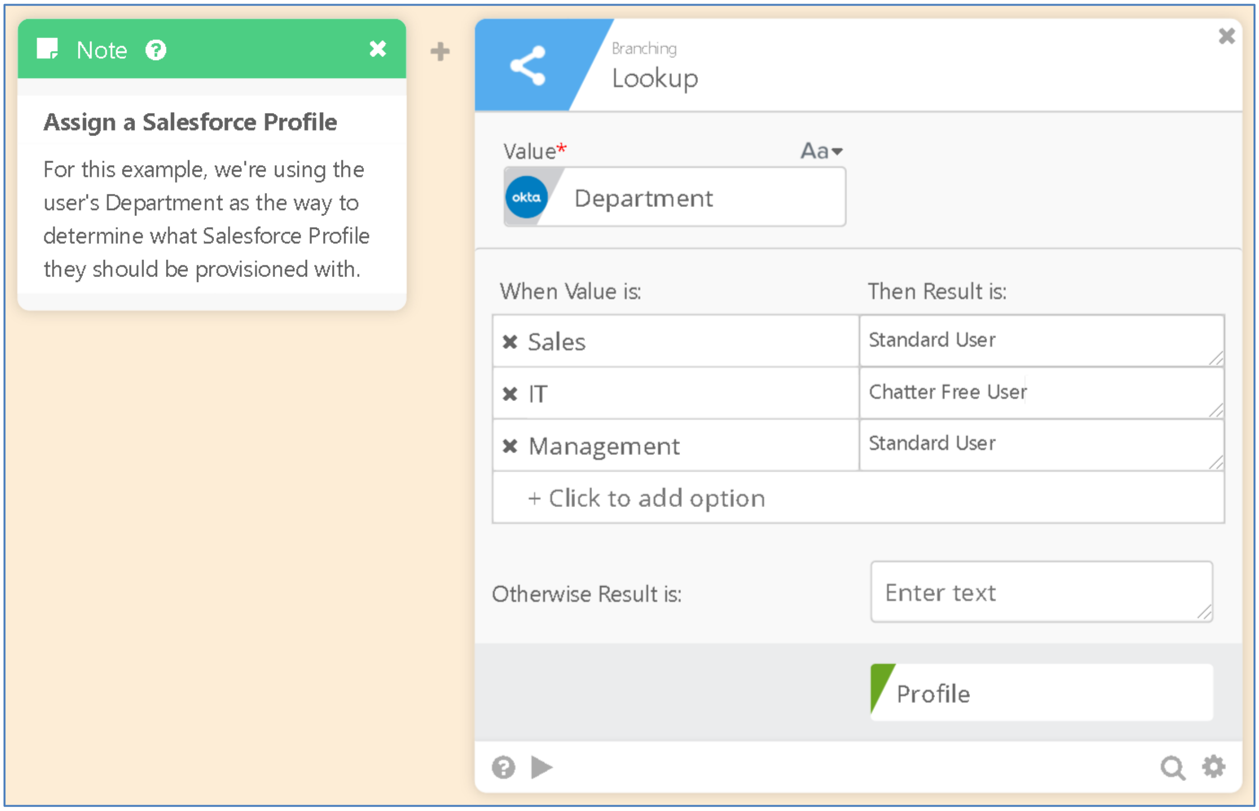
6. In the Application menu, select **salesforce**.
7. For Application Instance, select **Salesforce.com**.
8. Click **Done**.



9. In the next event card, **Search Users**, click on **Choose Connection**.
10. Click on the **Salesforce** connection and then click **Done**.



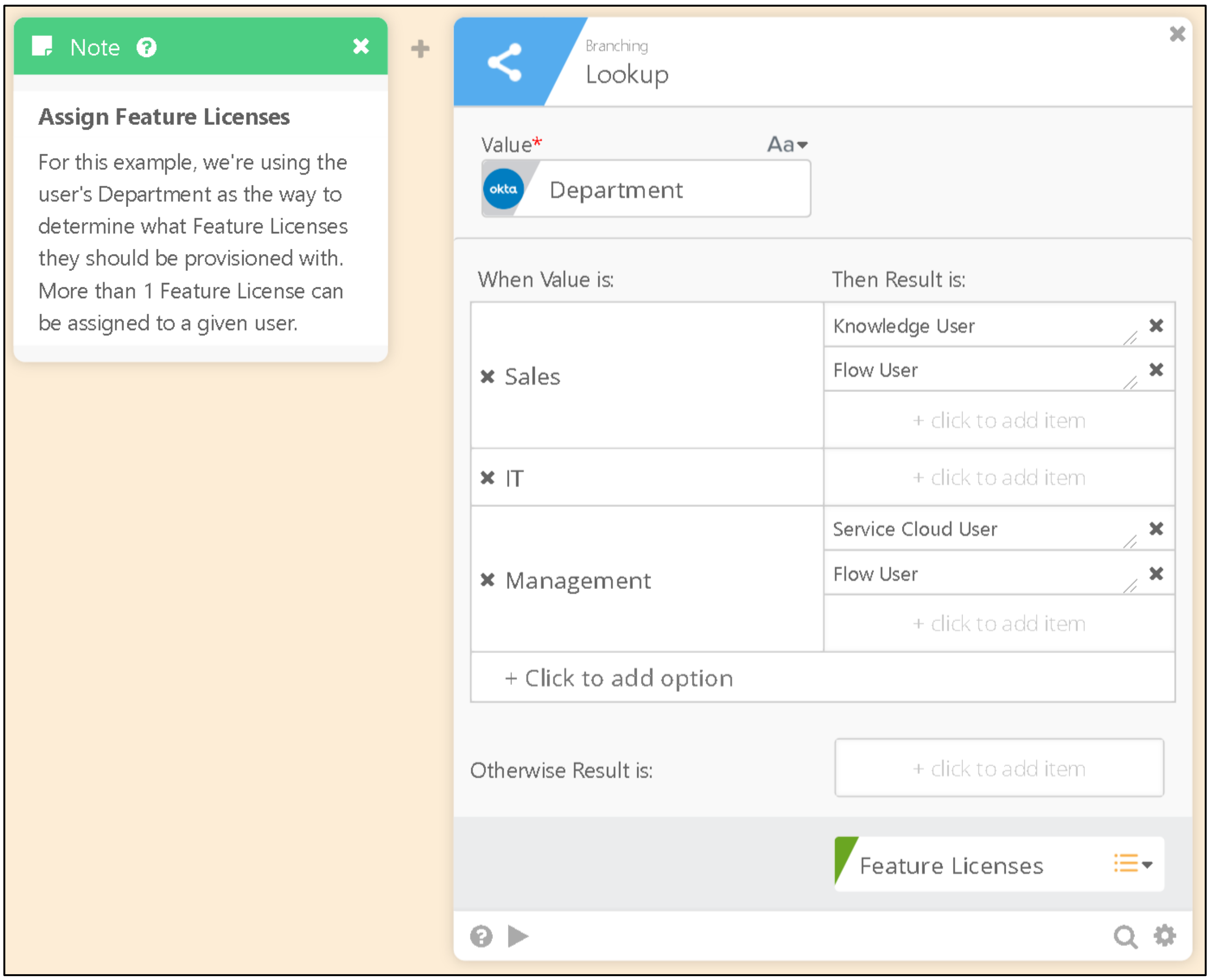
11. Use the browser slider at the bottom to scroll to the right and select the **first Branching Lookup** event card.
12. For the *When Value is* field for Sales, change the *Then Result is* to: **Standard User**
13. For the *When Value is* field for Marketing, change this to **IT** and change the *Then Result is* to: **Chatter Free User**
14. For the *When Value is* field for Operations, change this to **Management** and change the *Then Result is* to **Standard User**



15. Use the browser slider at the bottom to scroll to the right and select the **second Branching Lookup** event card.
16. For the *When Value is* field for Marketing, change this to **IT** and remove the Feature Licenses by selecting the **X** next to Marketing User and Flow User.
17. For the *When Value is* field for Operations, change this to **Management**.

Note: A Chatter Free Users profile (license) does not allow Feature Licenses to be assigned in Salesforce, hence why they are being removed for IT.

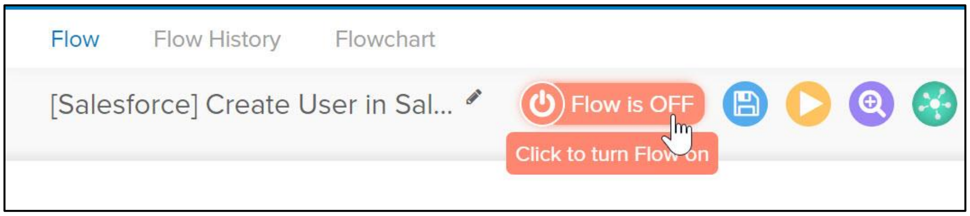
Tip: A Chatter Free User is a free license to test with inside of Salesforce.com.



18. Click on the blue floppy disk circle to save your flow.

19. Leave the defaults and click **Save Flow**.

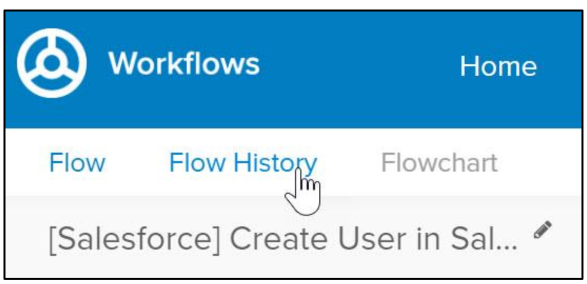
20. Toggle the **Flow is OFF** button to **ON**.



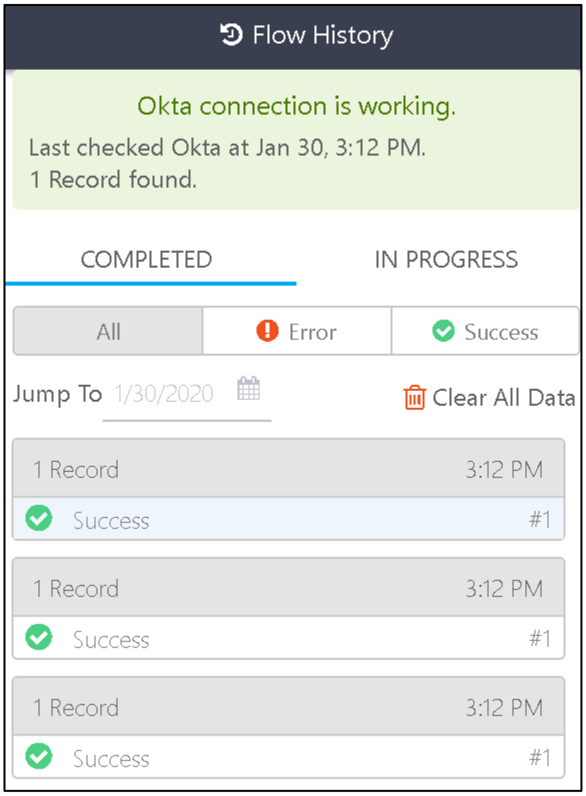
Create Users in Salesforce Using Workflow

Note: The event webhook registration may take up to 60 seconds to initialize. You will need to wait a minute before assigning any users. If you assign users to the Salesforce app in Okta before the workflow is initialized, nothing will be detected from Okta and the assigned users will need to be unassigned and re-assigned.

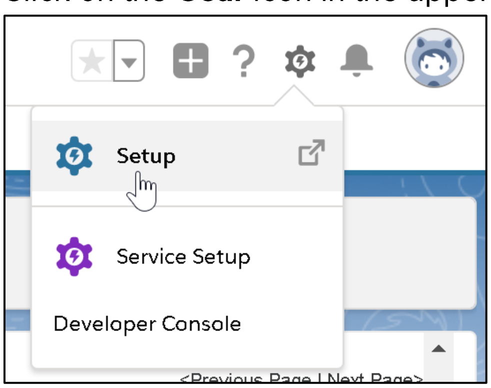
1. In the Okta Admin Console, navigate to **Applications** > **Applications**.
2. Click on the **Salesforce.com** application.
3. You will land on the Assignments tab. Click on **Assign** and then select **Assign to People**.
4. Next to **Mayer Hay** click **Assign**.
5. Click **Save and Go Back**.
6. Next to **Sugge Fitz** click **Assign**.
7. Click **Save and Go Back**.
8. Next to **Wells Betonia** click **Assign**.
9. Click **Save and Go Back**. Click **Done**.
10. Return to the Workflows console and click on **Flow History**.



11. At the very right of the webpage, you should see Completed flows that have been executed. You should see a green check mark and a note of **Success** for all three records.



12. In a new tab in your browser, navigate to **test.salesforce.com**
13. Enter the Salesforce credentials provided to you.
14. Click on the **Gear** icon in the upper right-hand corner and select **Setup**.



15. On the left-hand side, under ADMINISTRATION, expand the **Users** menu.
16. Scroll down and click on **Users**.
17. Confirm that the users are created in Salesforce with the correct profile (license): **Wells Betonia** (Chatter Free User), **Mayer Hay** (Standard User) and **Sugge Fitz** (Standard User).

Our Story (Continued)

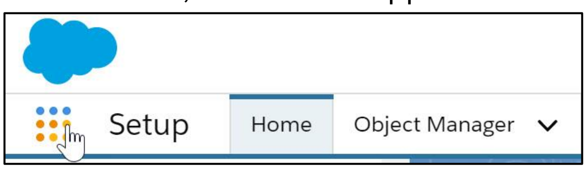
Mayer Hay has spent fifteen glorious minutes in Okta Ice's Sales department and has already made a lead for a possible sale, but the management team has decided they are going to move her to another team, and she will no longer require access to Salesforce. To ensure no leads are lost when her account in Salesforce is deactivated, the Okta Administrator needs to setup a workflow to transfer the lead to her manager and then deactivate her account.

Lab: Remove User in Salesforce and Transfer Leads

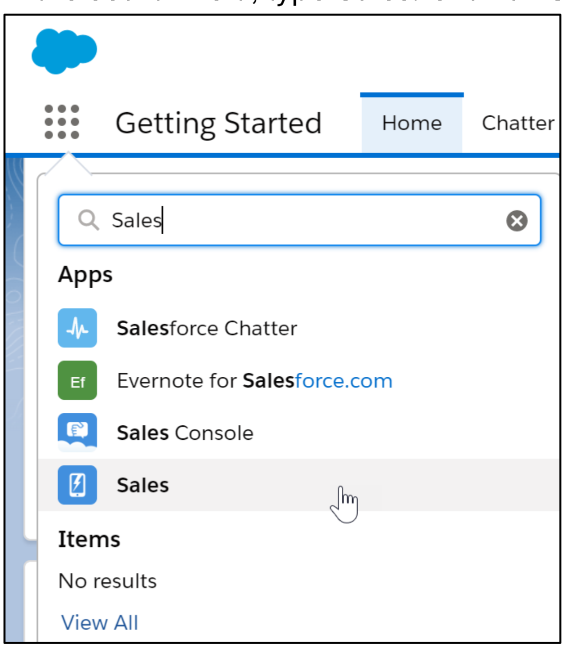
Objective	After you turn on this flow, once you unassign a user from the Salesforce application, any leads they owned will be transferred to their manager.
Scenario	Instead of manually reassigning each lead owned by a departing employee, this workflow will automate the process.
Duration	5-10 minutes

Create and Assign a Lead in Salesforce

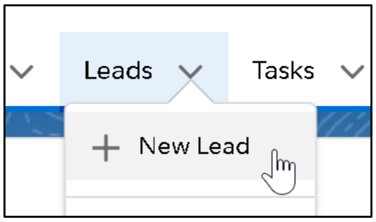
1. In Salesforce, click on the App Launcher in the upper left-hand side.



2. In the search field, type Sales. Click on **Sales**.



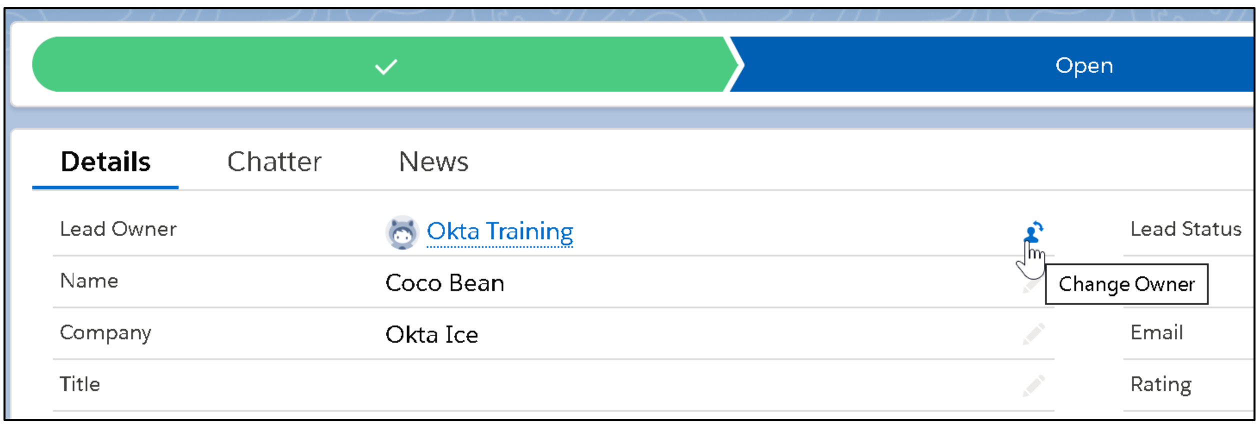
3. In the top menu, select the down arrow next to **Leads** and select **+ New Lead**.



4. Enter the following fields:

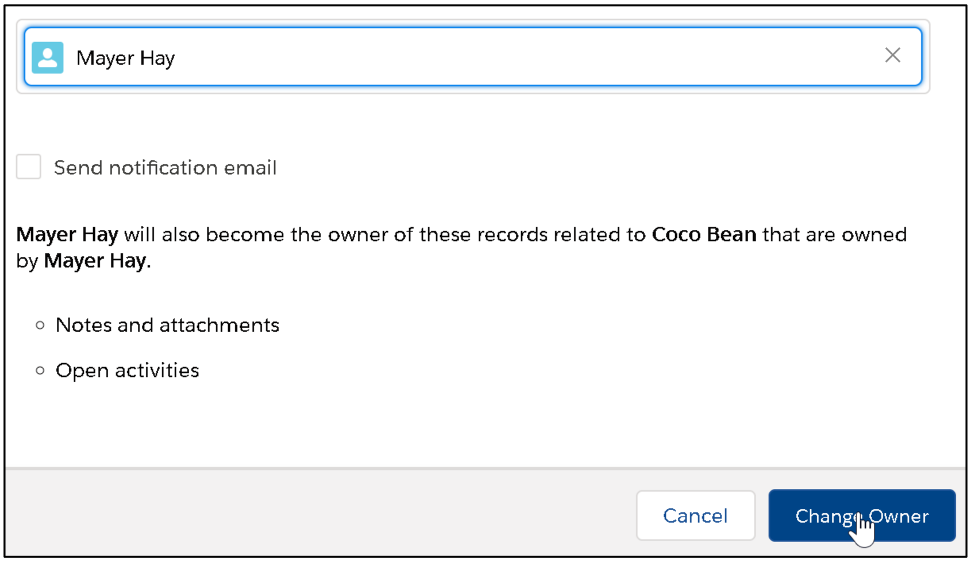
First Name	Coco
Last Name	Bean
Company	Okta Ice

5. Click **Save**.
6. Click on the **Change Owner** icon.



7. In the Search People . . . field, type in **Mayer** and select **Mayer Hay**.

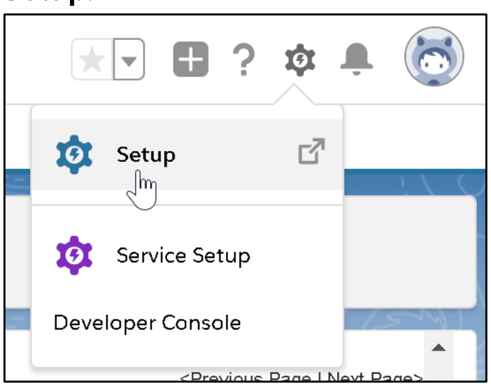
8. Click on **Change Owner**.



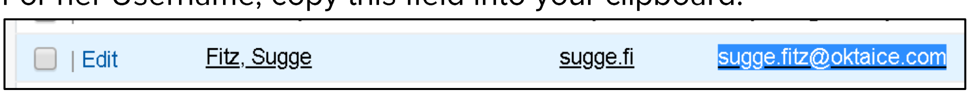
9. In the top menu, click on **Leads** and confirm that **mayer.ha** is Owner Alias for the lead.

Assign a Manager to Mayer Hay

1. In Salesforce, click on the **Gear** icon in the upper right-hand corner and select **Setup**.



2. On the left-hand side, under ADMINISTRATION, expand the **Users** menu.
3. Click **Users**.
4. Scroll down and locate **Fitz, Sugge**.
5. For her Username, copy this field into your clipboard.

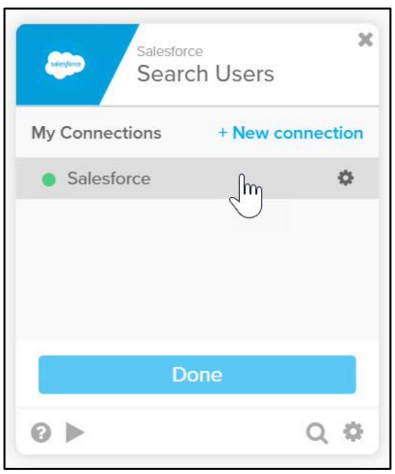


Note: The username may vary depending on how the user was provisioned into Salesforce. This was pre-defined in the Salesforce app configured in Okta.

6. In the Okta Admin app, navigate to **Directory** > **People**.
7. Click on **Mayer Hay** and select the **Profile** tab.
8. Click **Edit**.
9. Scroll down and find the **ManagerId** field and past in the Username for **Sugge Fitz,** you copied from Salesforce, into this field.
10. Click **Save**.

Edit the Workflow Template

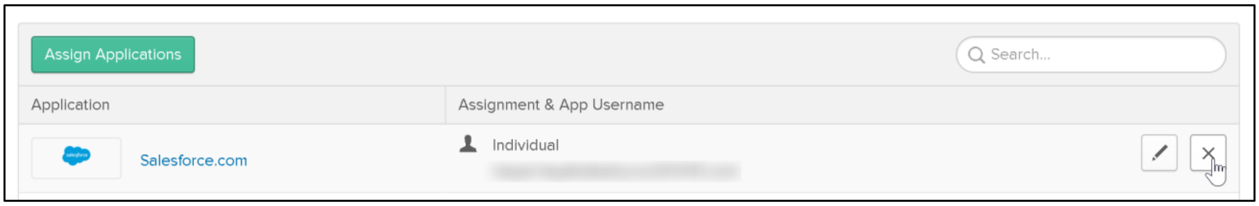
1. In the Workflows console, click on **Home**.
2. Click on the **[Salesforce] Remove User From Salesforce and Transfer Leads (Advanced)** workflow template.
3. On the **User Unassigned from Application** event card, click on **Choose Connection.**
4. Click on the **Oktane** connection.
5. Click on **Options**.
6. For Application, select **salesforce**.
7. For Application Instance, select **Salesforce.com**.
8. Click **Done**.
9. On the **Search Users** event card, click on **Choose Connection**.
10. Select the **Salesforce** connection.



11. Click on the blue floppy disk circle to save your flow.
12. Leave the defaults and click **Save**.
13. Toggle the **Flow is OFF** button to **ON**.

Unassign Salesforce from Mayer Hay in Okta

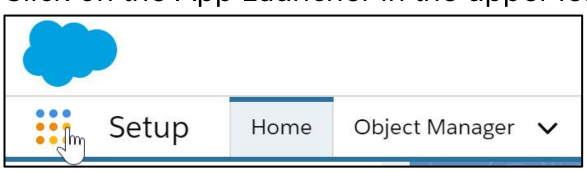
1. In the Okta Admin app, navigate to **Directory** > **People**.
2. Click on **Mayer Hay**.
3. By default, you will land on Assigned Applications tab. Select the **X** for the Salesforce.com application.



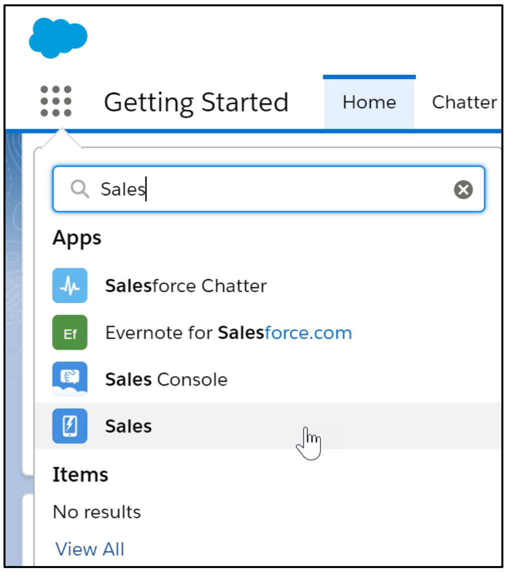
4. An Unassign Application pop-up will be presented. Click **OK**.

Consult Flow History to Confirm Workflow Success

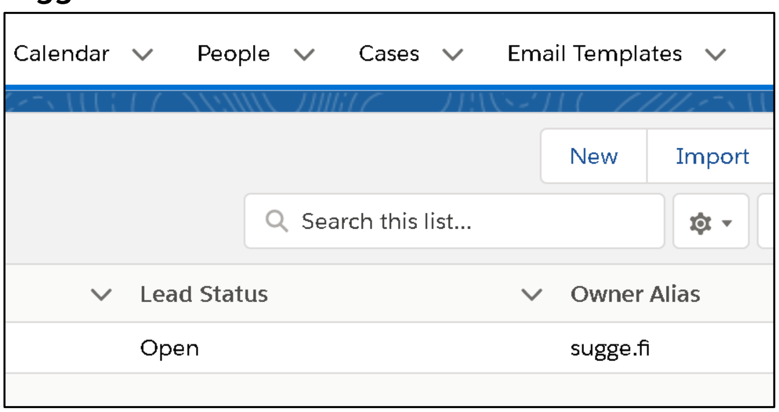
1. In the Workflows console, click on **Flow History**.
2. At the very right of the webpage, you should see Completed flows that have been executed. You should see a green check mark and a note of **Success** for one record.
3. In Salesforce, click on the gear icon in the upper right hand corner, and select **Setup**.
4. On the left-hand side, under ADMINISTRATION, expand the **Users** menu.
5. Click **Users**.
6. Scroll down and locate **Mayer, Hay**. Verify her account is no longer Active.
7. Click on the App Launcher in the upper left-hand side.



8. In the search field, type Sales. Click on **Sales**.



9. In the top menu, select **Leads** and verify Coco Bean now has an Owner Alias of **suggie.fi**.

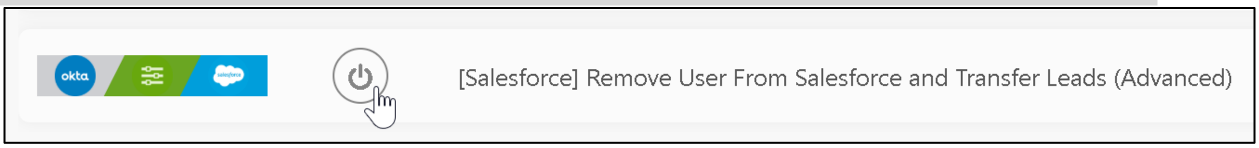


Lab: Manually Build Workflow to Remove Users in Salesforce

Objective	You have made some minor changes to a couple pre-defined workflows for Salesforce, now we are going to build a workflow from scratch.
Scenario	Your test IT contractor, Wells Betonia, is going to be un-assigned from Salesforce, and we want to verify your manually created workflow will automatically deactivate their account.
Duration	10-15 minutes

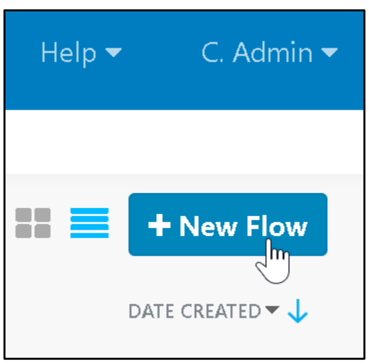
Turn off [Salesforce] Remove User From Salesforce and Transfer Leads (Advanced) Workflow

1. In the Workflows console, click on **Home**.
2. Click on the **Oktane20** folder.
3. For the **[Salesforce] Remove User From Salesforce and Transfer Leads (Advanced)** workflow template, click the button to turn off the workflow.
   Note: It should not be green/on.

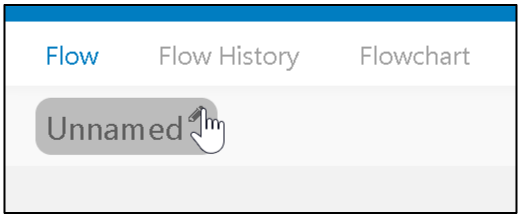


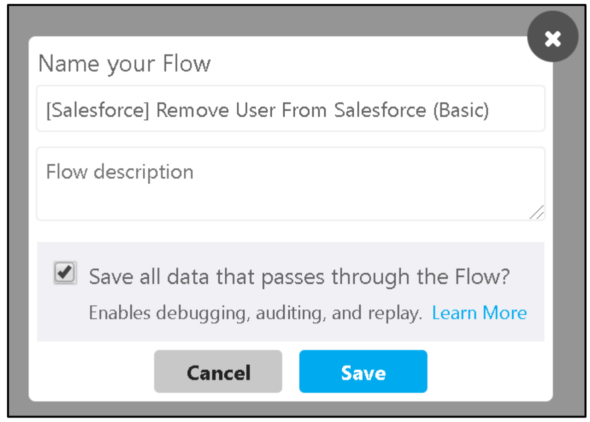
Create a New Flow

1. In the Workflows console, select **New Flow**, in the top right side of the interface.

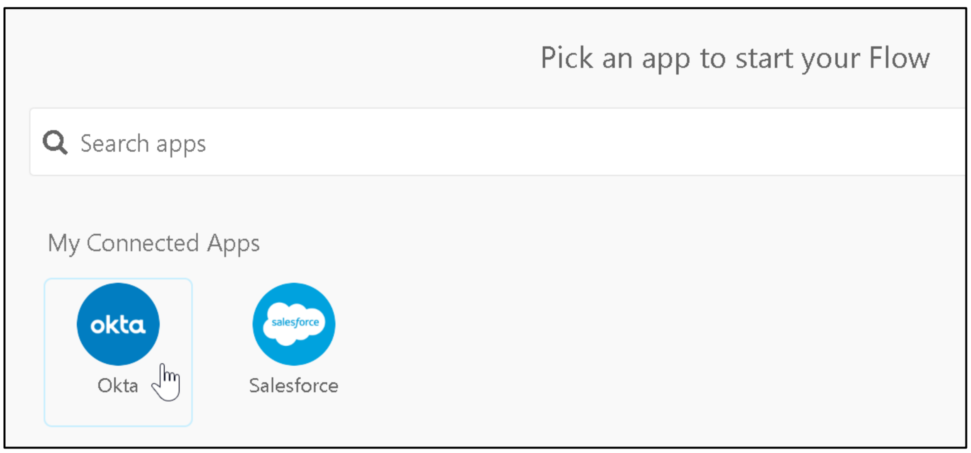


2. Click on the pencil, under Flow in the top left cover, and the define the following:
    - Name your Flow: **[Salesforce] Remove User From Salesforce (Basic)**
    - Enable **Select the option to Save all data that passes through the Flow?**



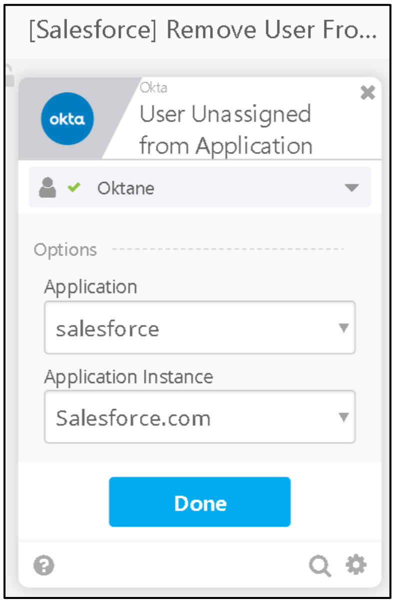


3. Select **Save**.
4. Under An event starts your Flow, select **Add Event**.
5. From the pop-up window, select **Okta** from My Connected Apps.

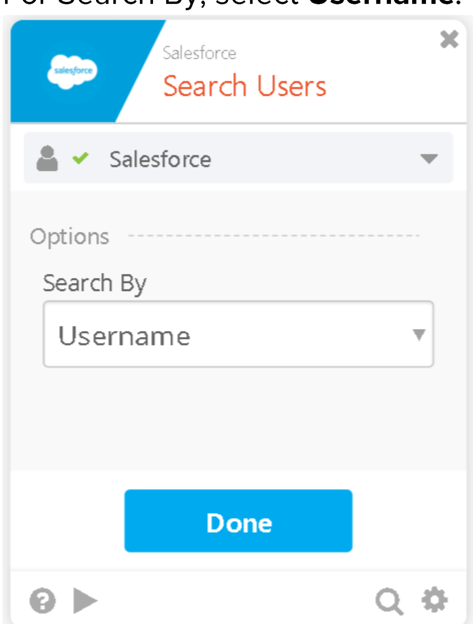


6. From the Search event of Okta search bar, select **User Unassigned from Application**. This will return you back to the workflow with User Unassigned from Application as the event that starts the workflow.

7. Under Options, for Application, click Choose an option and select **salesforce**.
8. For Application Instance, click Choose an option and select **Saleforce.com**.

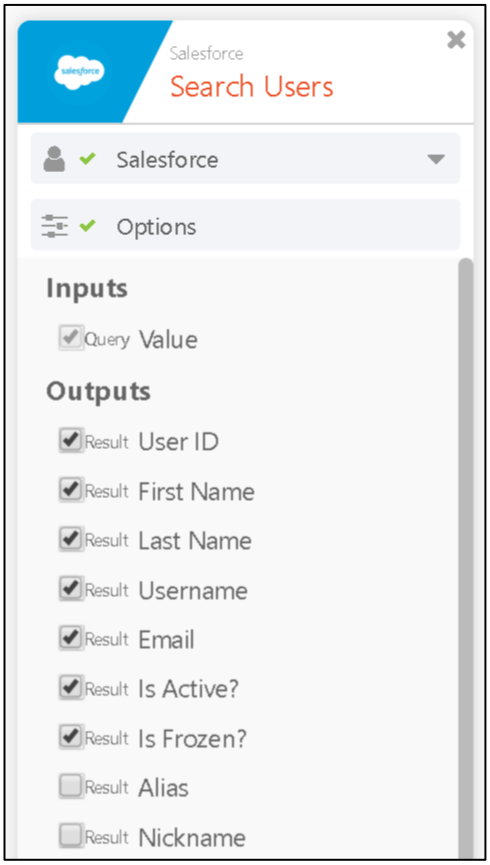


9. Select **Done**.
10. In the Add steps to your Flow, select App Action.
11. From the pop-up window, select **Salesforce** from My Connected Apps.
12. From the Search applications search bar, scroll down and select **Search Users**. This will return you back to the workflow with **Search Users** as an App Action, where the Search By field requires definition.
13. For Search By, select **Username**.



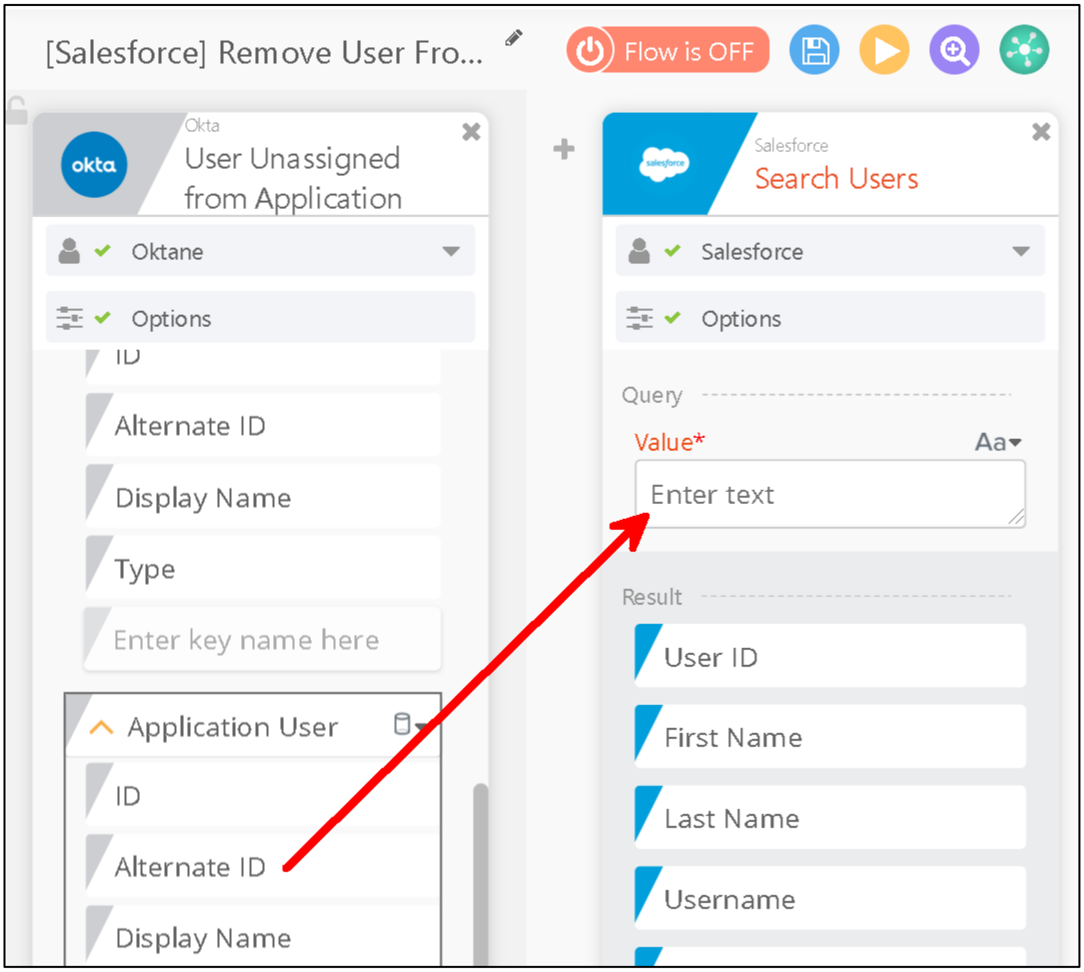
14. Select **Done**. Next, the Options for the App Action must be defined.

15. For Options, accept the default for the Input Value. For Outputs, select all options from **User ID** to **Is Frozen?**.

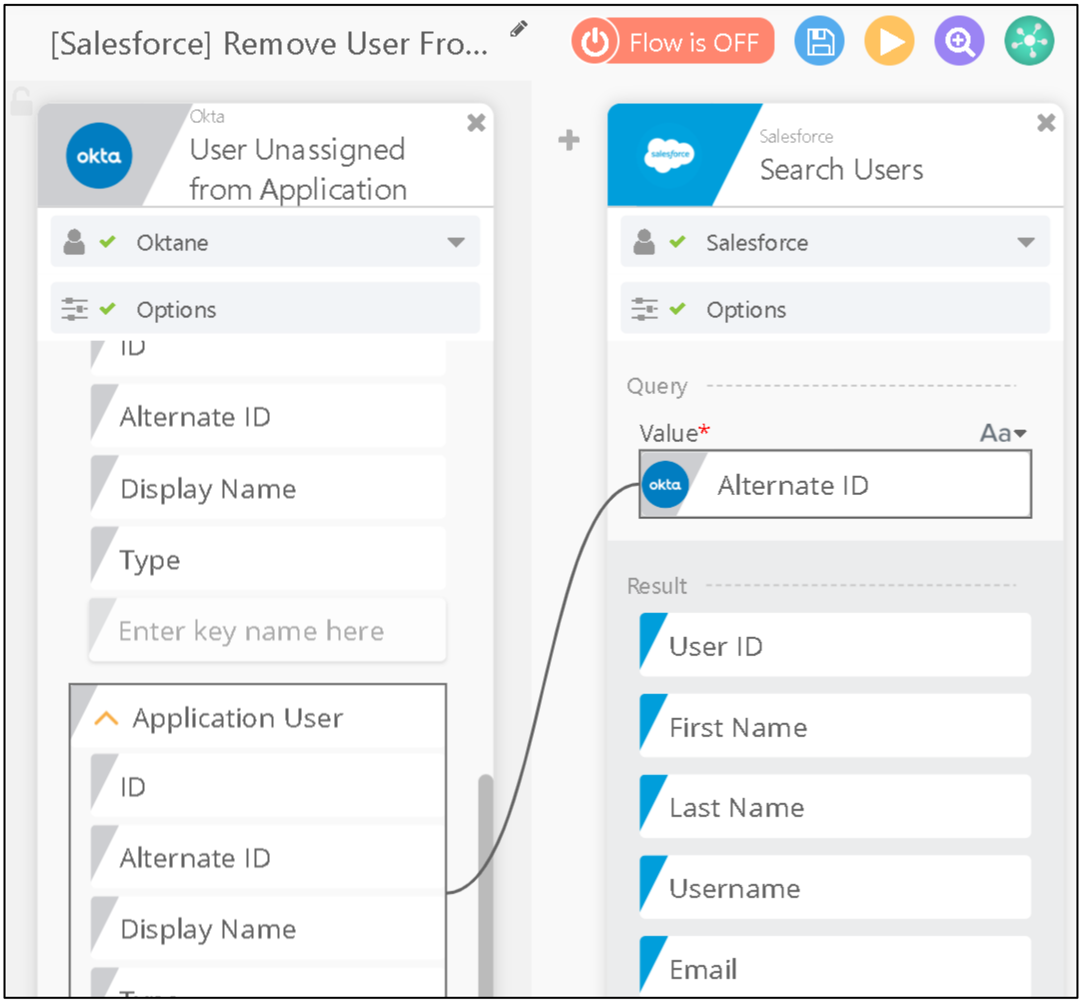


16. Select **Done**. Next the Value for the Query must be defined based on the event card.

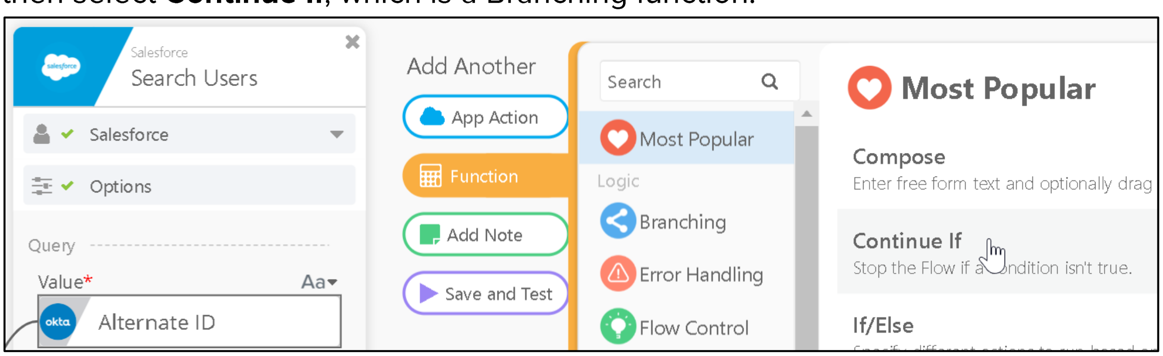
17. From the **User Unassigned from Application** event, on the left side, use the scroll bar to scroll to the Application User section. Under the **Application User** section**,** drag the **Alternate ID** to the **Query Value field** in the Search Users App Action.



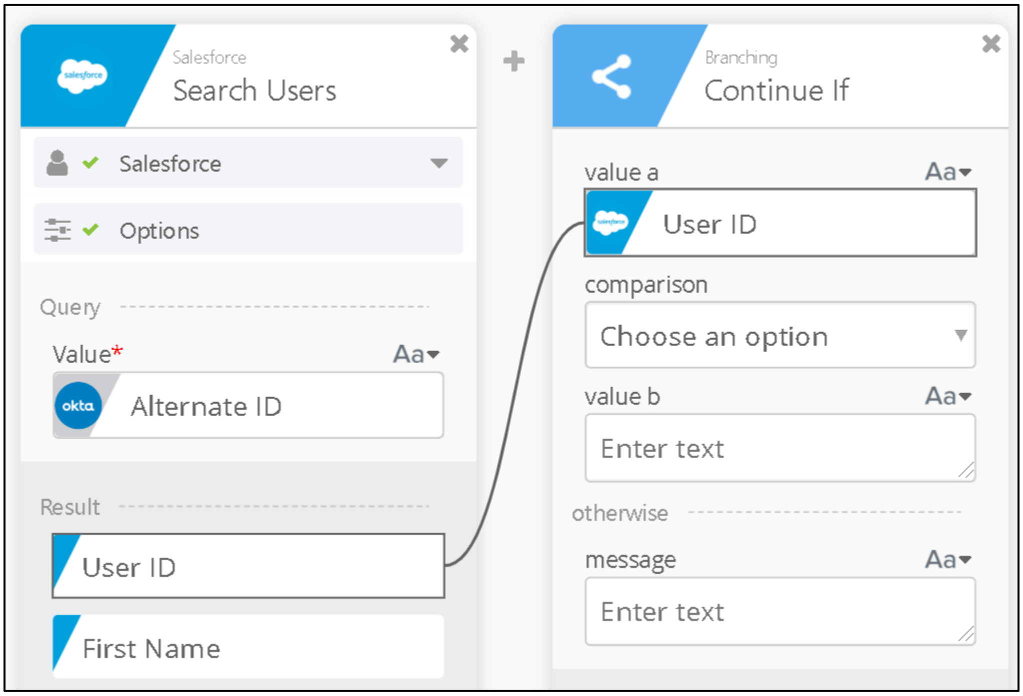
18. Verify there is a curved line connecting the Application User section to the Alternate ID value field for the Search Users App Action.



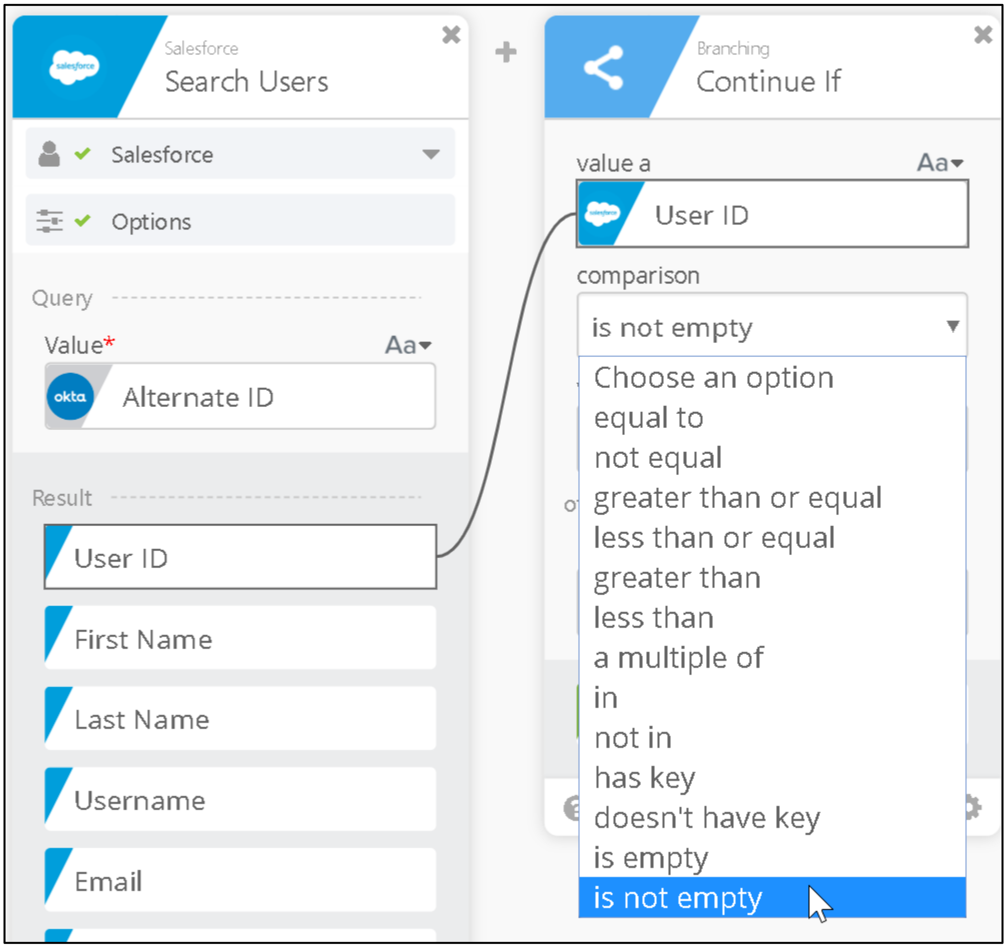
19. To the right of the Search Users App Action, under Add Another, select **Function**, then select **Continue If**, which is a Branching function.



20. From the Search Users App Action, drag the **User ID**, under Result into the **value a** for the **Branching Continue If** function.

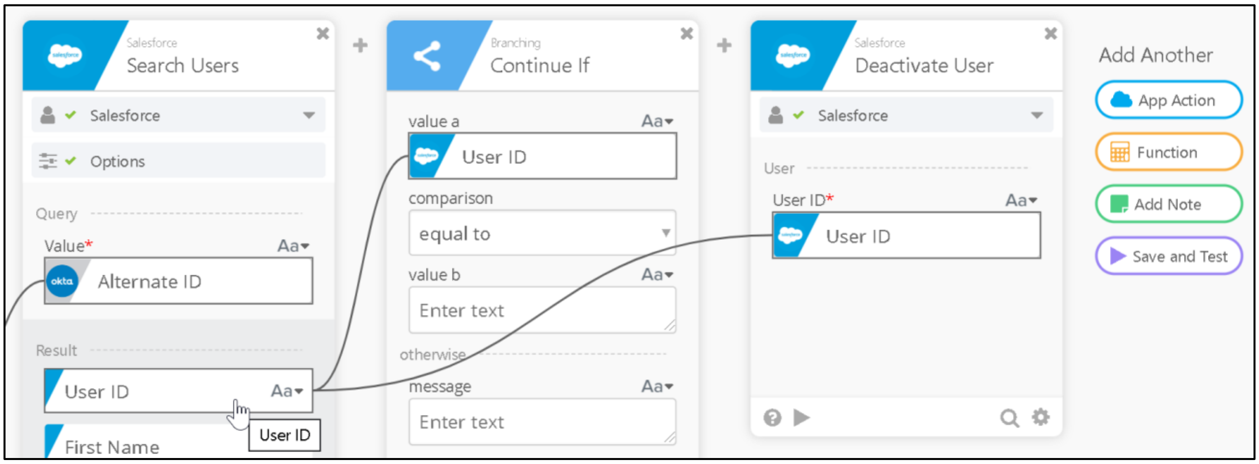


21. Under value a, for the **Branching Continue If** function, for **comparison**, use the drop-down menu to select **is not empty**.



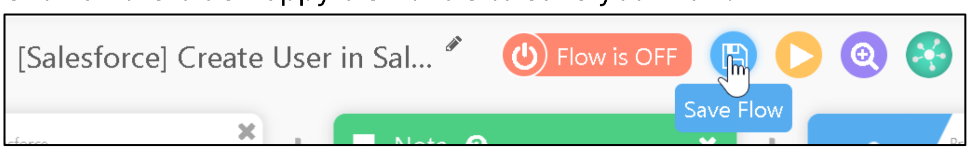
22. To the right of the Branching Continue If function, under Add Another, select **App Action**.
23. From the pop-up window, select **Salesforce** from My Connected Apps.
24. From the Search applications search bar, select **Deactivate User**. This will return you back to the workflow with Deactivate User as an App Action, where the User ID requires definition.

25. From the Search Users App Action, drag the **User ID**, under Result into the **User ID** for the Deactivate User app action section. When complete, there should be a curved line connecting the User ID from the Search Users app action to the **Branching Continue If** function and Deactivate Users app action. The curved lines will appear when you hover over the User ID for the Search Users app action section for the Result.

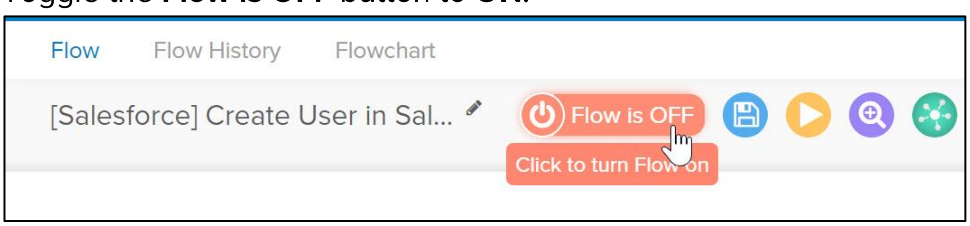


Note: Using the **Add Note** option, between sections, helps administrators understand how the workflow is executed to allow for easy updates and to perform focused troubleshooting.

21. Click on the blue floppy disk circle to save your flow.



22. Toggle the **Flow is OFF** button to **ON**.



Unassign Salesforce from Wells Betonia in Okta

1. In the Okta Admin app, navigate to **Directory** > **People**.
2. Click on **Wells Betonia**.
3. By default, you will land on Assigned Applications tab. Select the **X** for the Salesforce.com application.
4. An Unassign Application pop-up will be presented. Click **OK**.

Consult Flow History to Confirm Workflow Success

1. In the Workflows console, click on **Flow History**.
2. At the very right of the webpage, you should see Completed flows that have been executed. You should see a green check mark and a note of **Success** for one record.
3. In Salesforce, click on the **Gear** icon in the upper right-hand corner and select **Setup**.
4. On the left-hand side, under ADMINISTRATION, expand the **Users** menu.
5. Click **Users**.
6. Locate **Betonia, Wells** and verify the account is no longer Active.