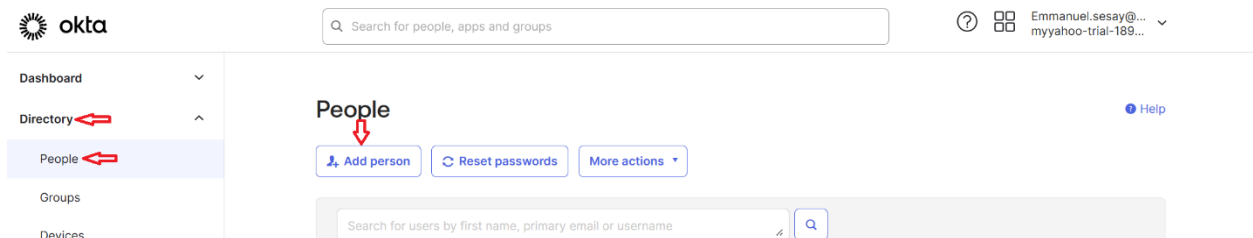


## Add a User via the Portal. Steps below:

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



## Populate the following fields for user. Steps blow:

- **First name, Last Name, Username, Primary email.**
- Activation: **Active now**, Check **Activate now**, Enter password , Uncheck **User must change password on first login**
- Click **save**

A screenshot of the 'Add Person' form in the Okta portal. The form is titled 'Add Person' and contains several fields: 'User type' (set to 'User'), 'First name' (Tony), 'Last name' (Green), 'Username' (myeventcrave@gmail.com), 'Primary email' (myeventcrave@gmail.com), 'Secondary email (optional)', 'Groups (optional)', and 'Activation' (set to 'Activate now'). There are two checkboxes: 'I will set password' (checked) and 'User must change password on first login' (unchecked). A password field is visible below the first checkbox. At the bottom, there are three buttons: 'Save', 'Save and Add Another', and 'Cancel'. Red arrows point to the 'Add person' button in the previous screenshot and the 'Add Person' form in this one.

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

Okta logo

Search for people, apps and groups

Emmanuel.sesay@... myyahoo-trial-189...

Dashboard

Directory

People

Groups

Devices

Profile Editor

Directory Integrations

Profile Sources

Customizations

### People

Help

Add person Reset passwords More actions

Search for users by first name, primary email or username

Advanced search

Status All Showing 2 of 2

Person & username	Primary email	Status
Tom Ford myeventcrave@gmail.com	myeventcrave@gmail.com	Active

Assure user can log in.

Search your apps

Tom myyahoo-trial-1898962

Trust this account in the Okta browser plugin

Open the Okta browser plugin and click Trust to give the plugin permission to access your applications. [Need help?](#)

My Apps

**Add custom attribute. Steps below:**

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

Dashboard

Directory

People

Groups

Devices

Profile Editor

Directory Integrations

Profile Sources

Customizations

Applications

Security

Workflow

Reports

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

Users Groups

Users

Search...

Create Okta User Type

Filters	Profile	Type
All	okta User (default) user	Okta
Okta		

- 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

## Add Attribute

Data type

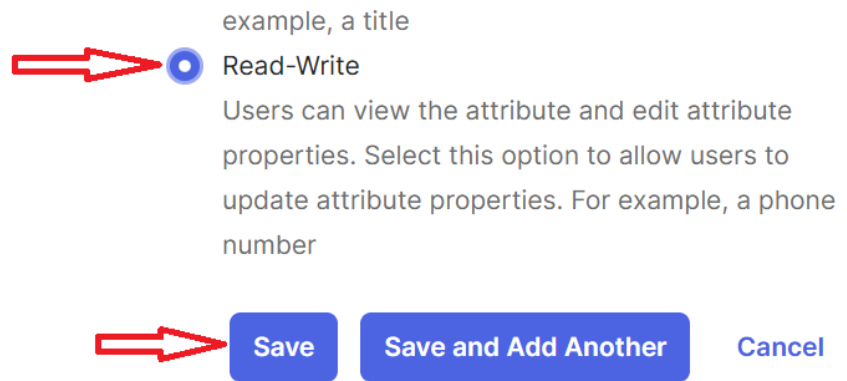
string

Display name ?

Preferred Name

Variable name ?

preferredName

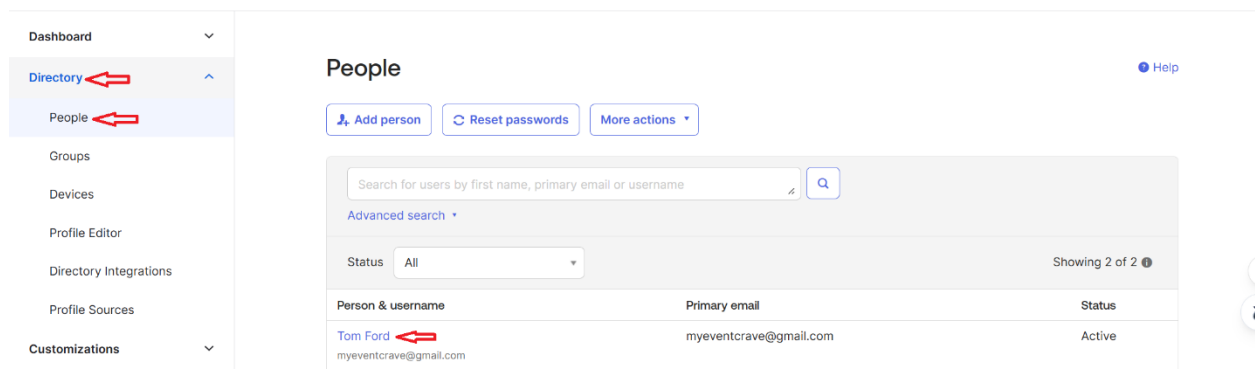


Make sure custom attribute is added.

Manager	manager	string	Base	
Preferred Name	preferredName	string	Custom	

## Add preferred name.

- Click **Directory**, click **People**, then username **Tom Ford**



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

Applications Groups **Profile** Devices Admin roles

**Attributes**

Username myeventcrave@gmail.com [Edit](#)

Preferred Name preferredName Tom



[Save](#) [Cancel](#)


**Profile**


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

## Import users 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**

Dashboard  

Directory 

People 

Groups

Devices

Profile Editor

Directory Integrations

Profile Sources

Customizations

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

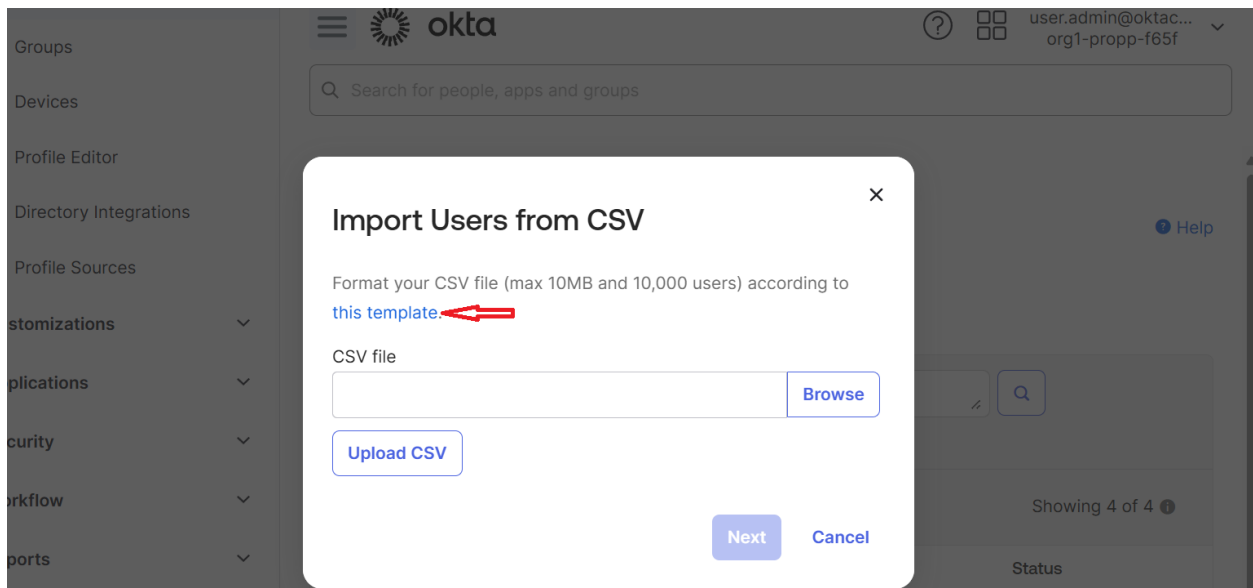
Search for people, apps and groups

**People**

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

[Import users from CSV](#)

- Download the CSV template



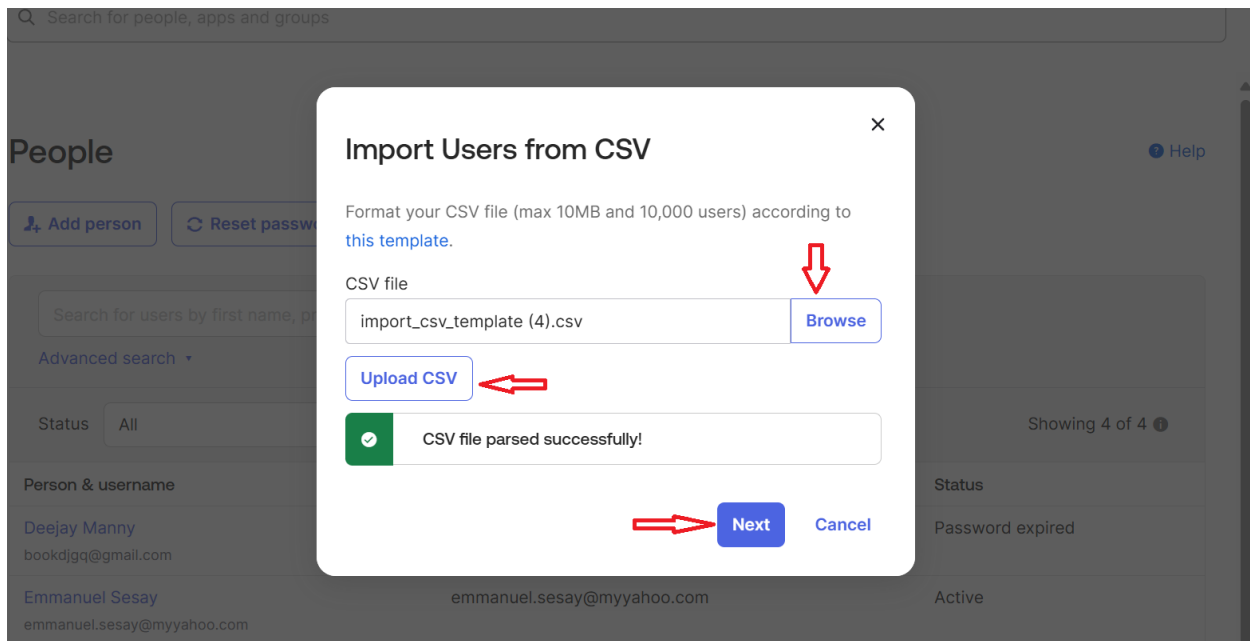
- Populate the following fields for user: **login, firstname, lastname, email, department.**

	A	B	C	D	E	F	G	H	I	J
	login	firstName	lastName	middleName	honorificPrefix	honorificSuffix	email	title	displayName	nickName
	anna.ford	Anna	Ford				anna.ford@myeventc	Anna		
	david.smit	David	Smith				david.smith@myeven	David		
	james.lee	James	Lee				james.lee@myeventc	James		
	solomon.p	Solomon	Page				solomon.page@myev	Solomon		

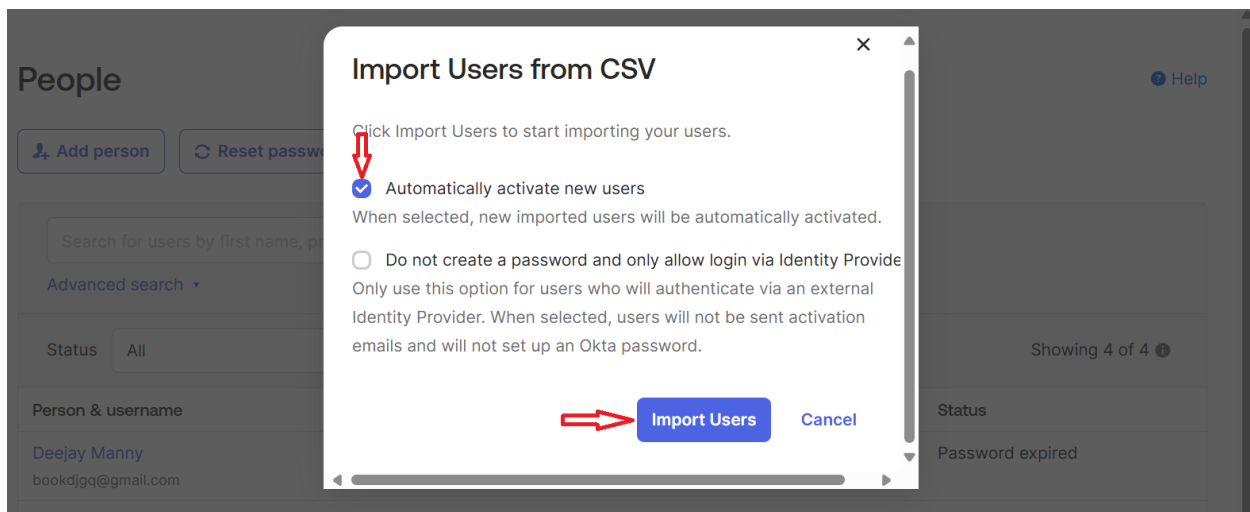
  

Z	AA	AB	AC	AD	AE
Center	organization	division	department	managerId	manager
			Sales		
			Sales		
			Marketing		
			Marketing		

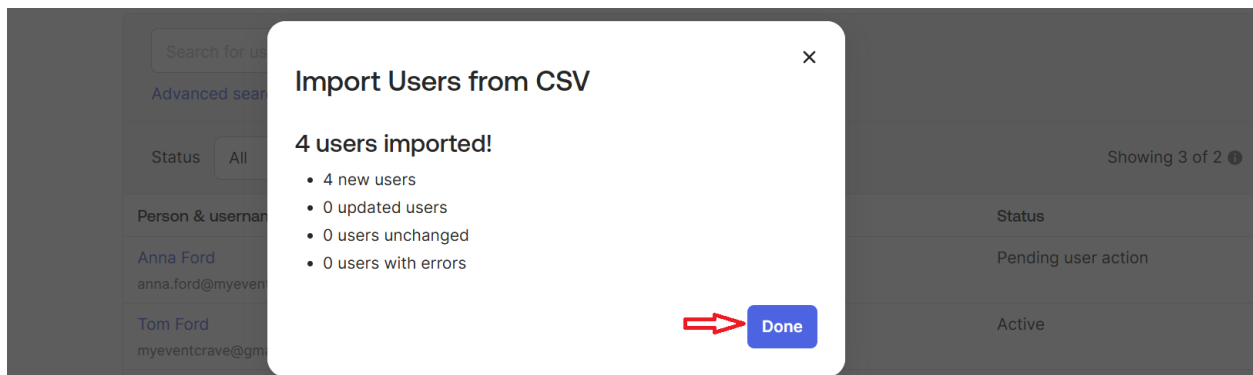
- Click **Browse**, then open cvs file, click **Upload CSV**
- Confirm successful validation and then click **Next**



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



- Click **Done**



Confirm that the new users are 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 6 of 6

Person & username	Primary email	Status
<a href="#">Anna Ford</a> anna.ford@myeventcrave.com	anna.ford@myeventcrave.com	Pending user action
<a href="#">David Smith</a> david.smith@myeventcrave.com	david.smith@myeventcrave.com	Pending user action
<a href="#">James Lee</a> james.lee@myeventcrave.com	james.lee@myeventcrave.com	Pending user action
<a href="#">Solomon Page</a> solomon.page@myeventcrave.com	solomon.page@myeventcrave.com	Pending user action

Remember to login as users to activate users accounts.



## People

[Help](#)

[Add person](#)

[Reset passwords](#)

[More actions](#)

Search for users by first name, primary email or username		
Advanced search		
Status	All	Showing 6 of 6
Person & username	Primary email	Status
<a href="#">Solomon Page</a> solomon.page@myeventcrave.com	solomon.page@myeventcrave.com	Active
<a href="#">James Lee</a> james.lee@myeventcrave.com	james.lee@myeventcrave.com	Active
<a href="#">David Smith</a> david.smith@myeventcrave.com	david.smith@myeventcrave.com	Active
<a href="#">Anna Ford</a> anna.ford@myeventcrave.com	anna.ford@myeventcrave.com	Active

**Create a group, Add users to group by rule, And also add users 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

- Populate **Name**, **Group Description**, then click **Save**

Add group

Name Marketing

Description (optional) All Marketers

Save Cancel

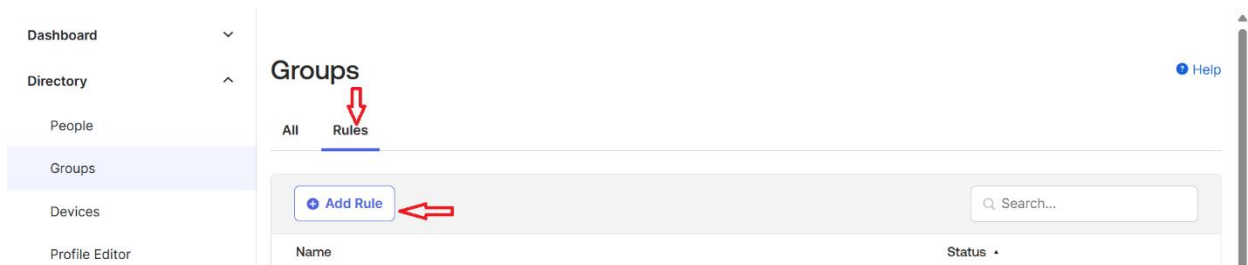
Showing 4

Applications

0

0

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



- Name: **Marketing Rule**, Select User attribute, select **department | string**, populate **Marketing**, Assign to **All Contractors**, Click on **save**

Name Marketing Rule

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

User attribute department | string Equals Marketing

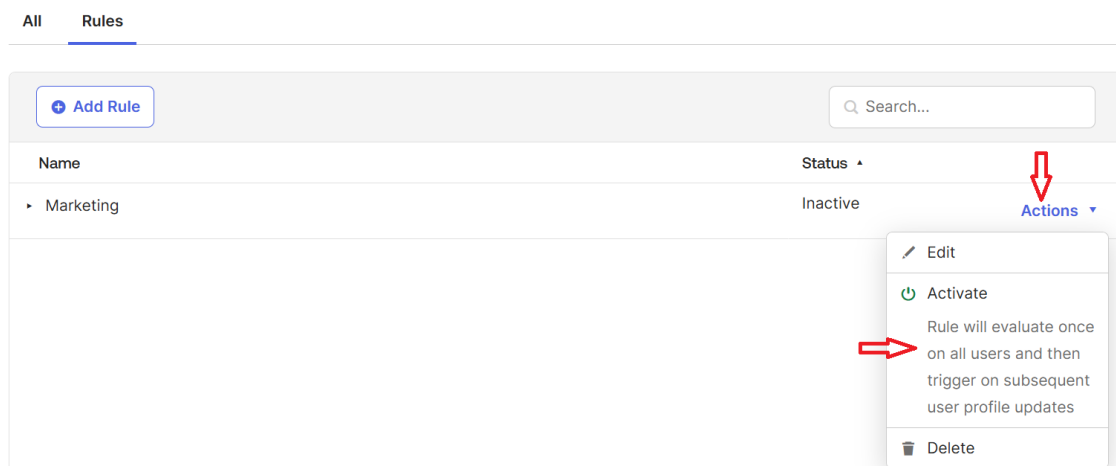
THEN Assign to Marketing

This rule will not add users to a group they've been manually removed from.

EXCEPT The following users

Enter an Okta user to preview this rule

- Click **Action**, then click **Activate**



- Confirm users are added to **Marketing** group by rule

## Marketing

Actions ▾

All Marketing

🕒 Created: 6/5/2025 🕒 Last modified: 6/5/2025 [View logs](#)

**People** Applications Profile Directories Admin roles

### People

Search for users by first name, primary email or username 🔍			⋮ ▾	Assign people
Advanced search ▾			Showing 2 of 2 ⓘ	
Person & username	Status	Managed		
<a href="#">James Lee</a> james.lee@myeventcrave.com	Active	By rule <a href="#">Marketing Rule</a> ←	✕	
<a href="#">Solomon Page</a> solomon.page@myeventcrave.com	Active	By rule <a href="#">Marketing Rule</a> ←	✕	

- 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 ↓

- Populate **Name**, **Group Description**, then click **Save**

⚙️ Add group

**Add group**

Name → Sales

Description (optional) → All Sales

→ Save Cancel

Showing 4

Applications

0

0

- Confirm group is created

## Groups

[Help](#)

**All** Rules

Search by group name

Q

Add group

Advanced search

Group source type

All

Showing 4

Group name	People	Applications
<div><div><div></div><div>Sales</div><div></div></div><div>All Sales</div></div>	0	0

### Assign users to group manually.

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

Dashboard ▾

Directory

People

Groups

Devices

Profile Editor

Directory Integrations

Profile Sources

Customizations ▾

Groups

[Help](#)

All Rules

[Advanced search](#) ▾

Group source type ▾ All Showing 4

Group name		People	Applications
	Sales	2	0
	All Sales		

- Click **People**, click **Assign people**, then assign users

All Sales

Created: 6/5/2025 Last modified: 6/5/2025 [View logs](#)

People

Applications

Profile

Directories

Admin roles

## People

Search for users by first name, primary email or username



Assign people

[Advanced search](#)

## Assign people to Sales

Done

Search for users by first name, primary email or username



More actions

[Advanced search](#)

Showing 6

Person & username	Status	Managed	
<a href="#">Solomon Page</a> solomon.page@myeventcrave.com	Active	Manually	+
<a href="#">James Lee</a> james.lee@myeventcrave.com	Active	Manually	+
<a href="#">David Smith</a> david.smith@myeventcrave.com	Active	Manually	➡+
<a href="#">Anna Ford</a> anna.ford@myeventcrave.com	Active	Manually	➡+

Confirm users were assign to group manually.

- Dashboard
- Directory
- People
- Groups
- Devices
- Profile Editor
- Directory Integrations
- Profile Sources
- Customizations
- Applications
- Security
- Workflow
- Reports
- Settings

[Back to Groups](#)

All Sales

Created: 6/5/2025 Last modified: 6/5/2025 [View logs](#)

People

Applications

Profile

Directories

Admin roles

## People

Search for users by first name, primary email or username



Assign people

[Advanced search](#)

Showing 2 of 2

Person & username	Status	Managed	
<a href="#">Anna Ford</a> anna.ford@myeventcrave.com	Active	➡ Manually	x
<a href="#">David Smith</a> david.smith@myeventcrave.com	Active	➡ Manually	x

