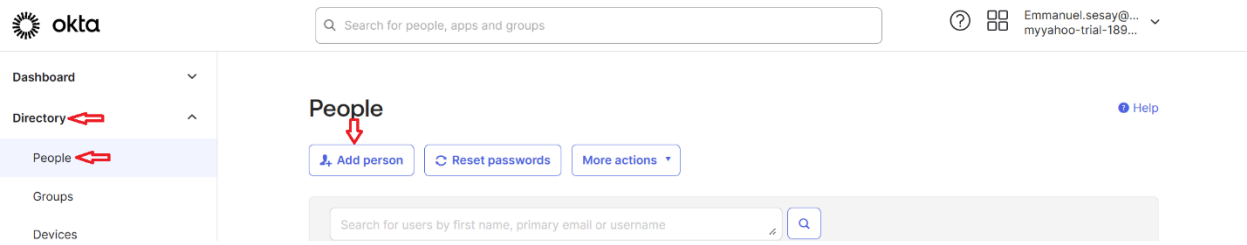
Add a User via the Portal. Steps below:

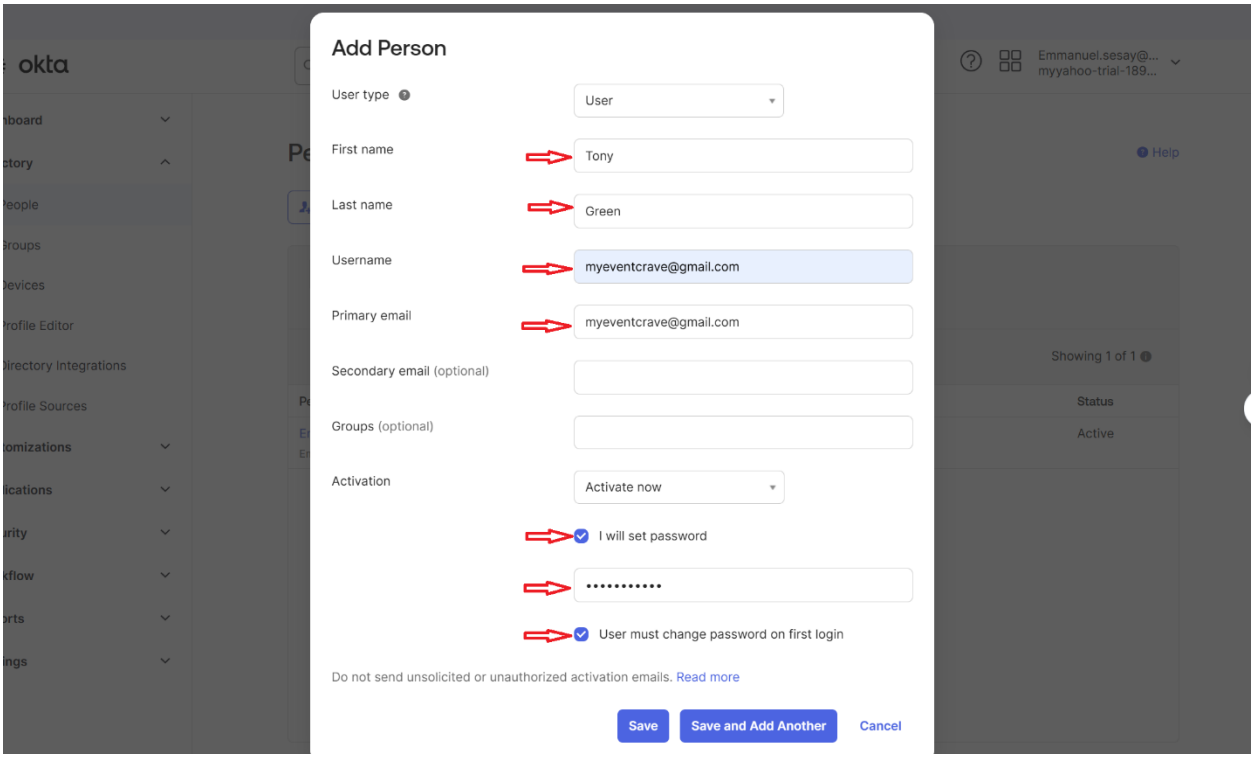
- Log in as Super admin
- From the portal, click on **Directory** and then **People**
- Click **Add Person**



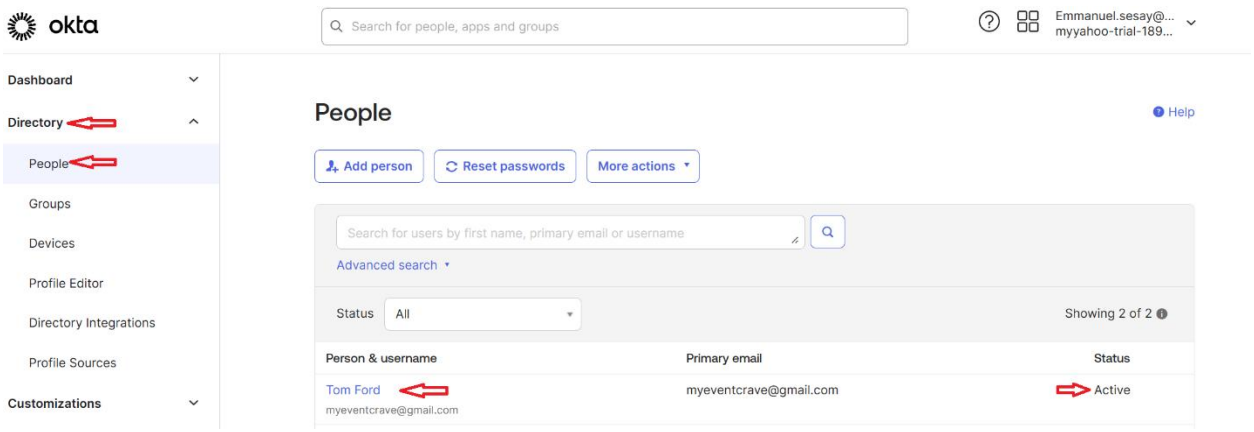
Populate the following fields for user. Steps blow:

- **First name, Last Name, Username, Primary email.**

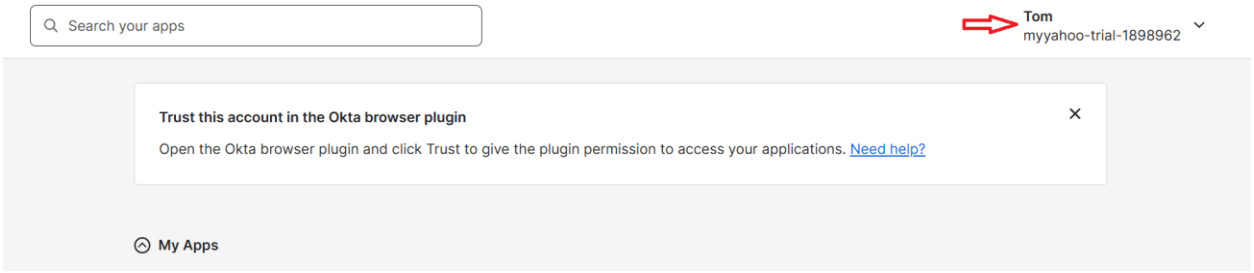
- Activation**: Active now**, Check **Activate now,** Enter password **,** Uncheck **User must change password on first login**
- Click **save**



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

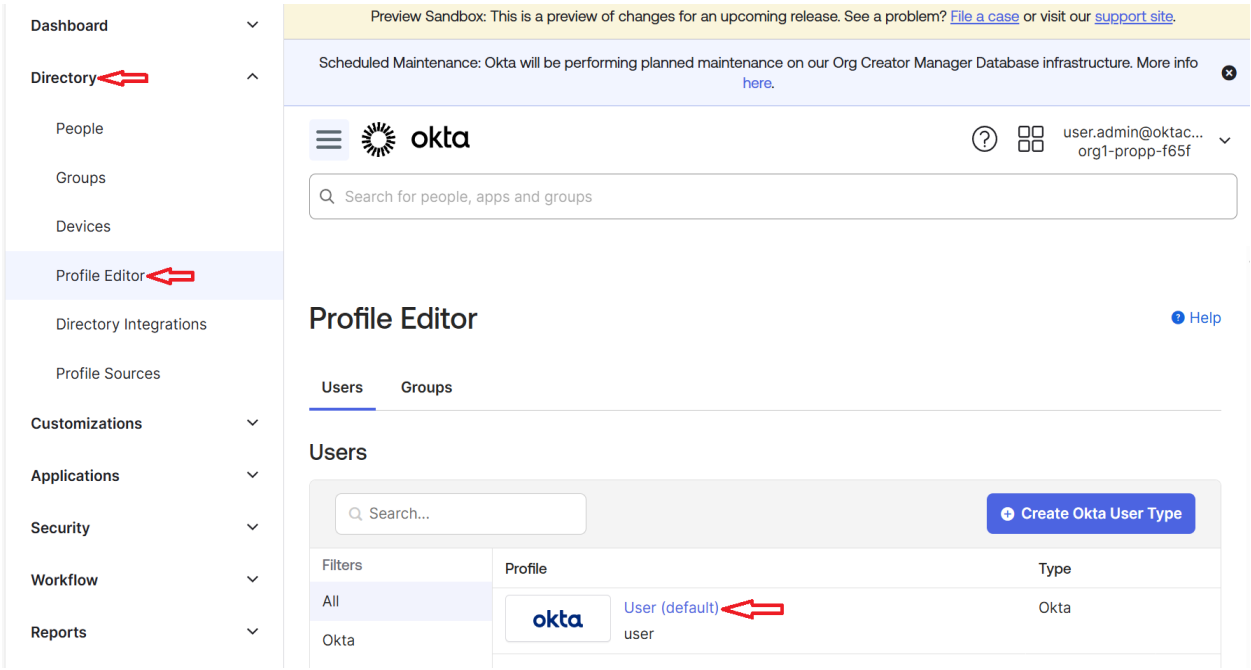


Assure user can log in.

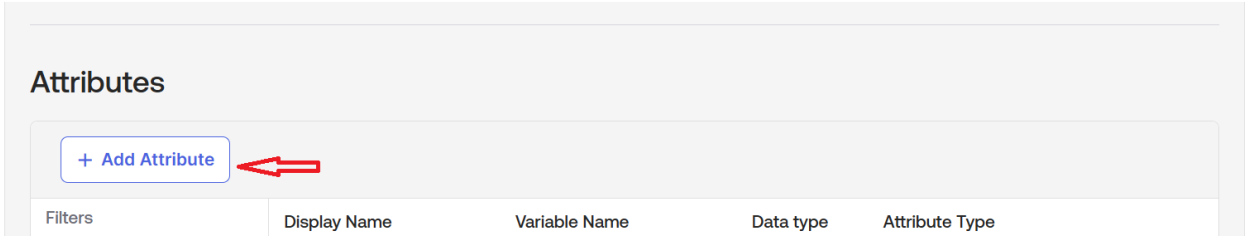


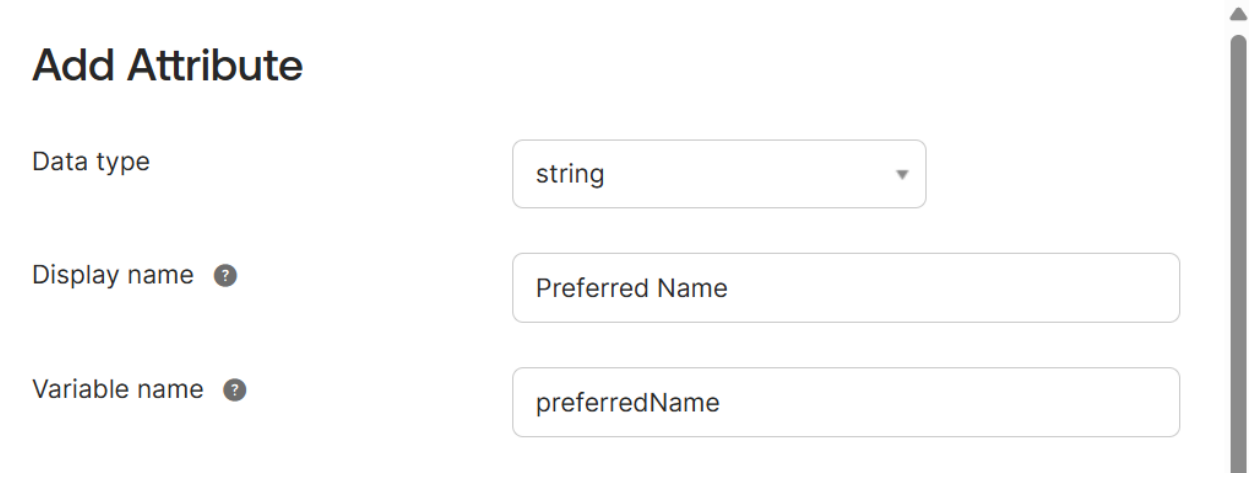
Add custom attribute. Steps below:

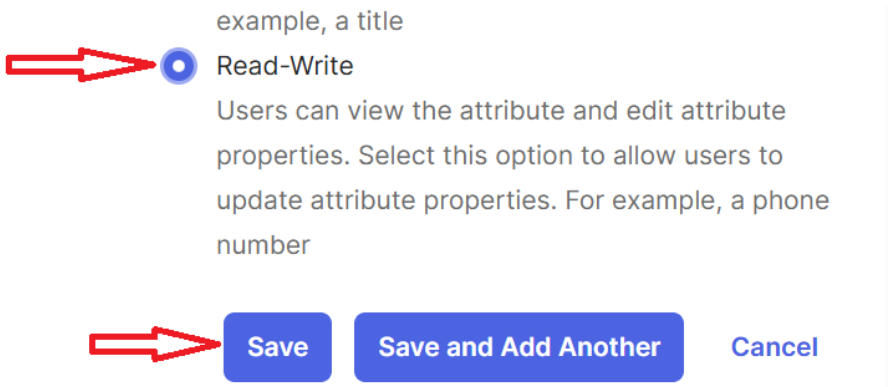
- Click **Directory, Profile Editor,** then **okta user**



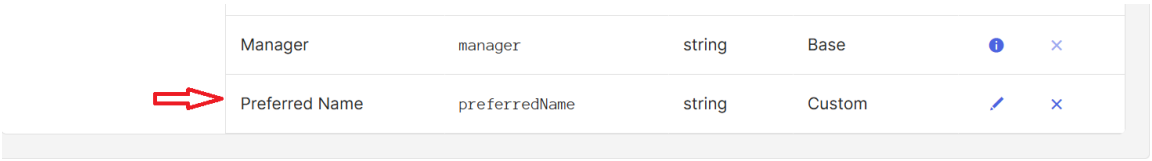
- Click **Add Attribute,** Display Name **Preferred Name,** Variable name **preferredName,** check **Read-Write,** click **Save**





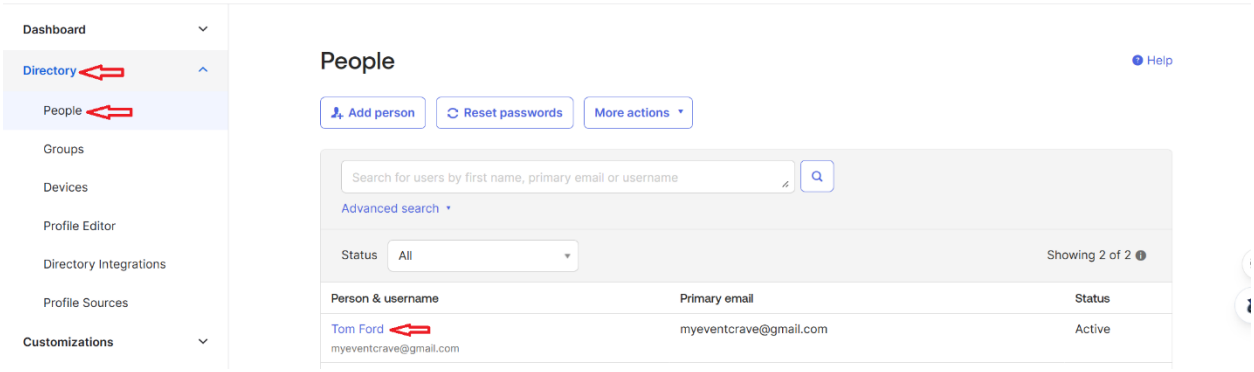


Make sure custom attribute is added.

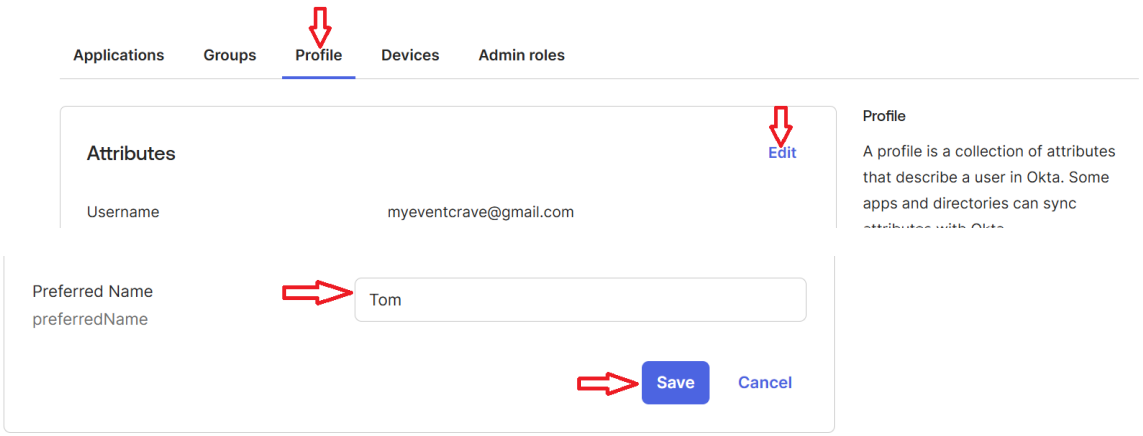


Add preferred name.

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

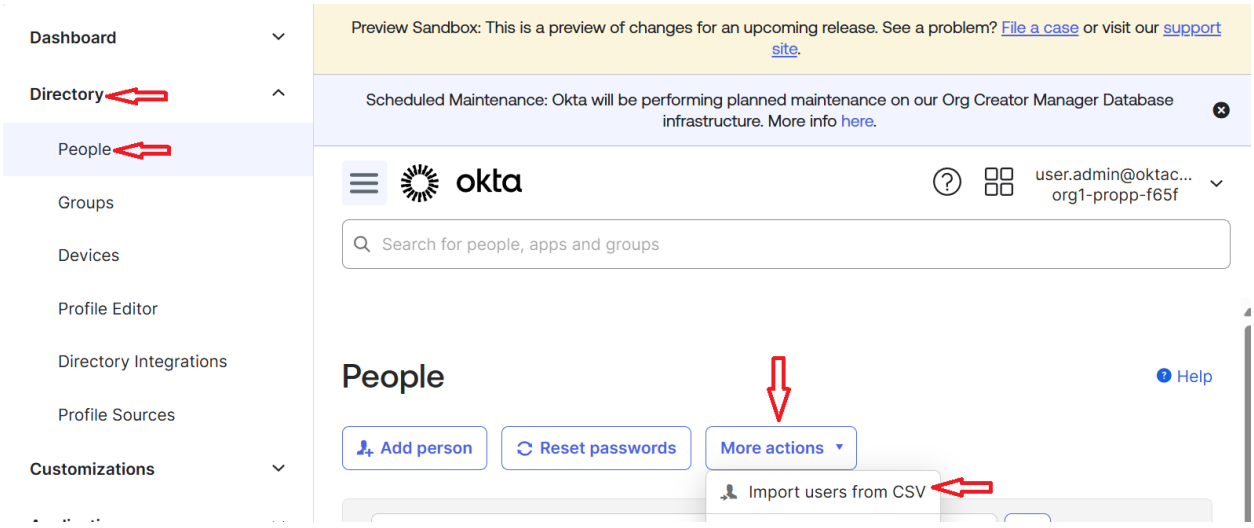


- Click **Profile**, click **Edit**, Preferred Name **Tom,** then click **Save**

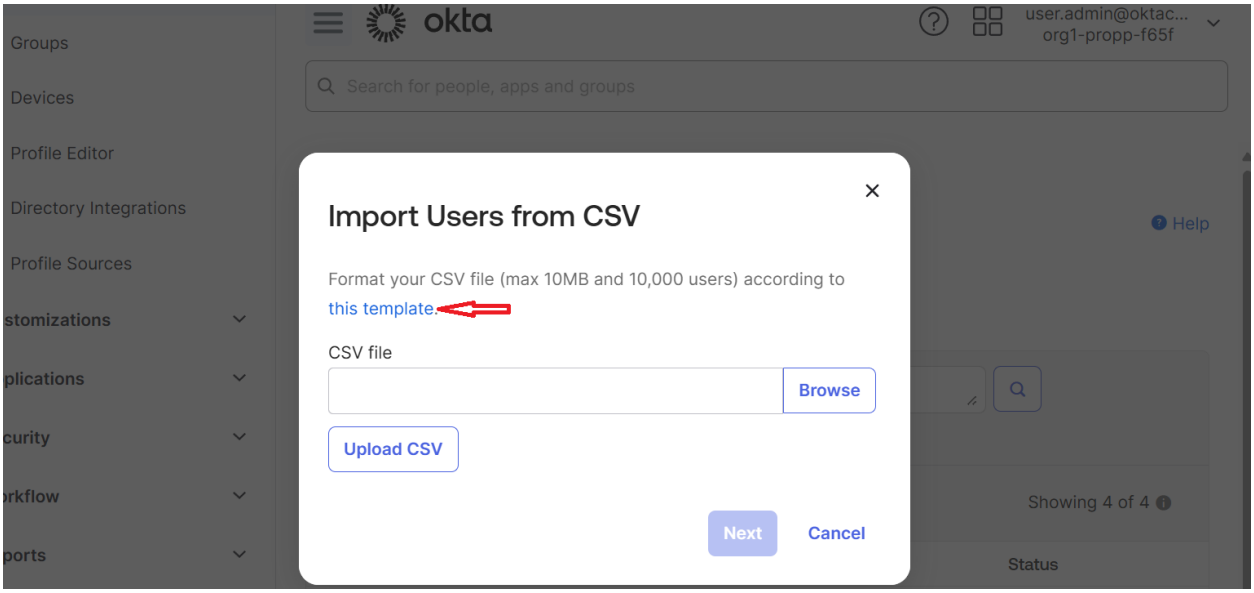


Import users into Okta, using a CSV file. Steps below:

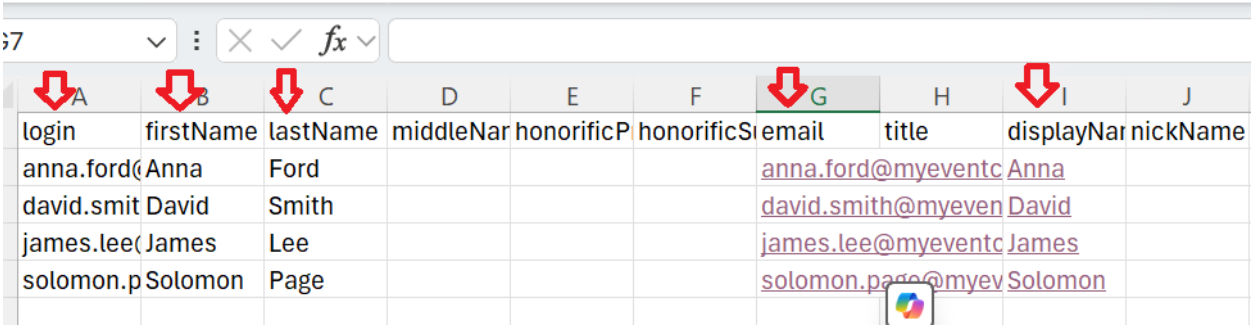
- From the super admin portal
- Click **Directory,** click **People,** click **More actions,** then **Import users from csv**



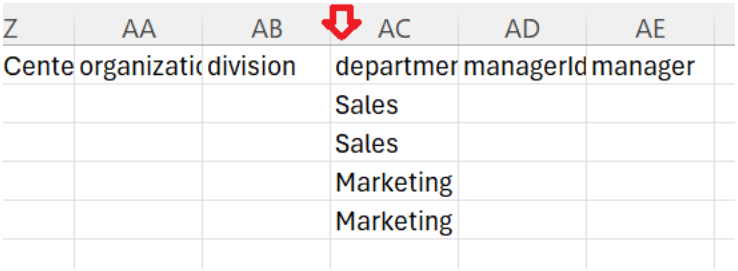
- Download the CSV template



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

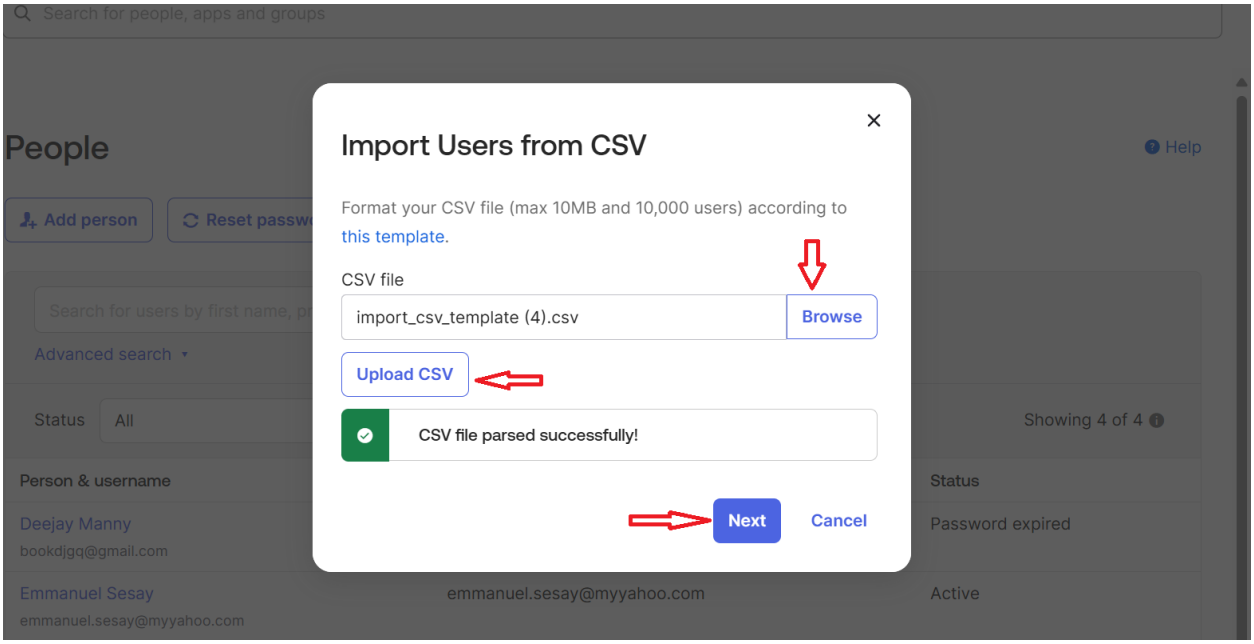


login	firstName	lastName	middleNar	honorificP	honorificSı	email	title	displayNar	nickName
anna.ford(	Anna	Ford				anna.ford@myeventc		Anna	
david.smit	David	Smith				david.smith@myeven		David	
james.lee(	James	Lee				james.lee@myeventc		James	
solomon.p	Solomon	Page				solomon.page@myev		Solomon	

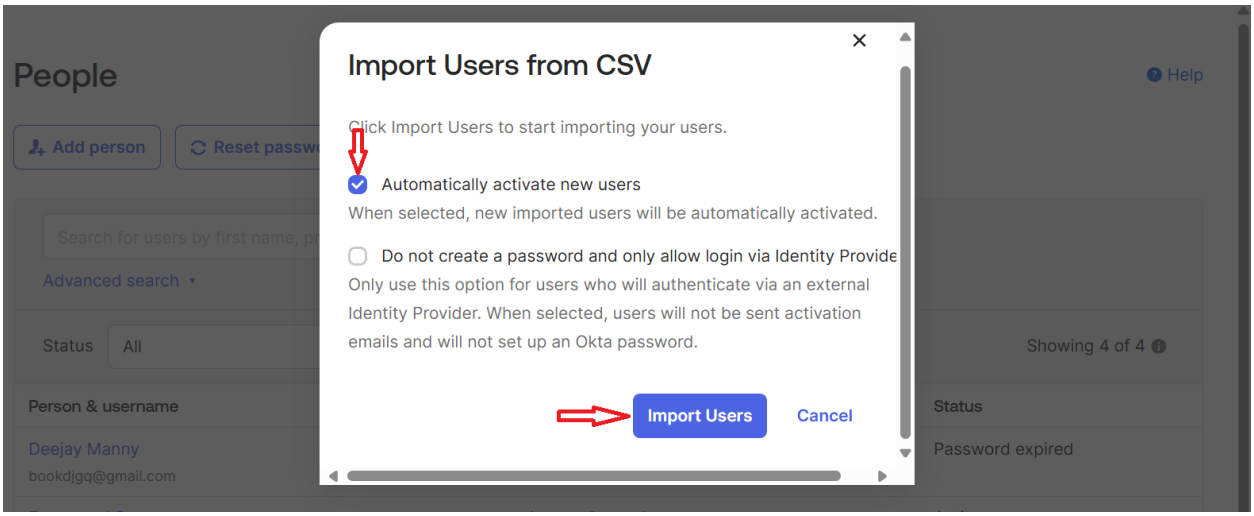


Cente	organizatic	division	departmer	managerId	manager
			Sales		
			Sales		
			Marketing		
			Marketing		

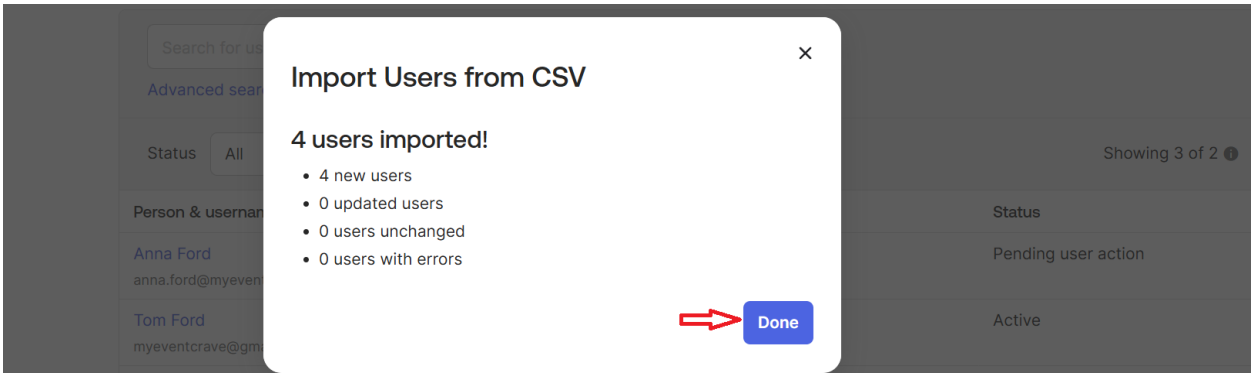
- Click **Browse,** then open cvs file, click **Upload CSV**
- Confirm successful validation and then click **Next**



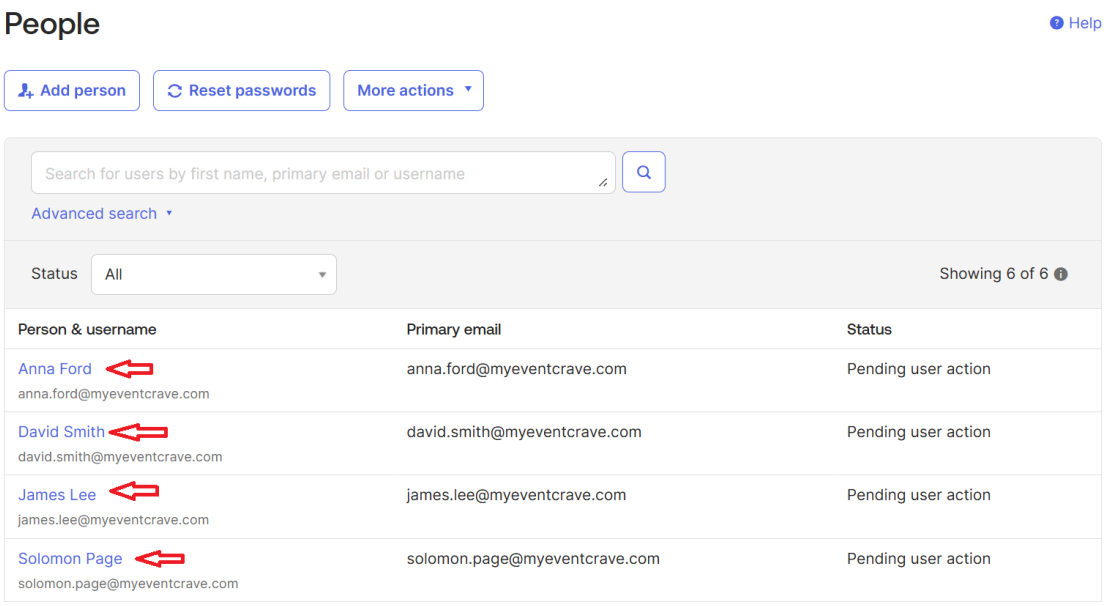
- Check **Automatically activate new users,** Click **Import Users**



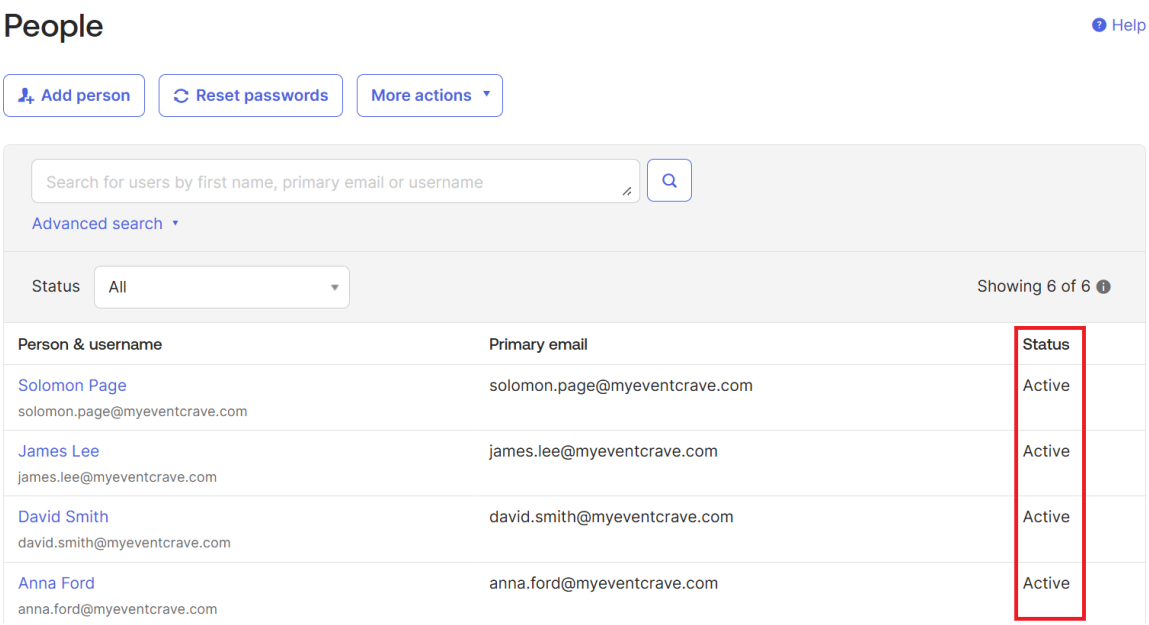
- Click **Done**



Confirm that the new users are listed on the **People** page

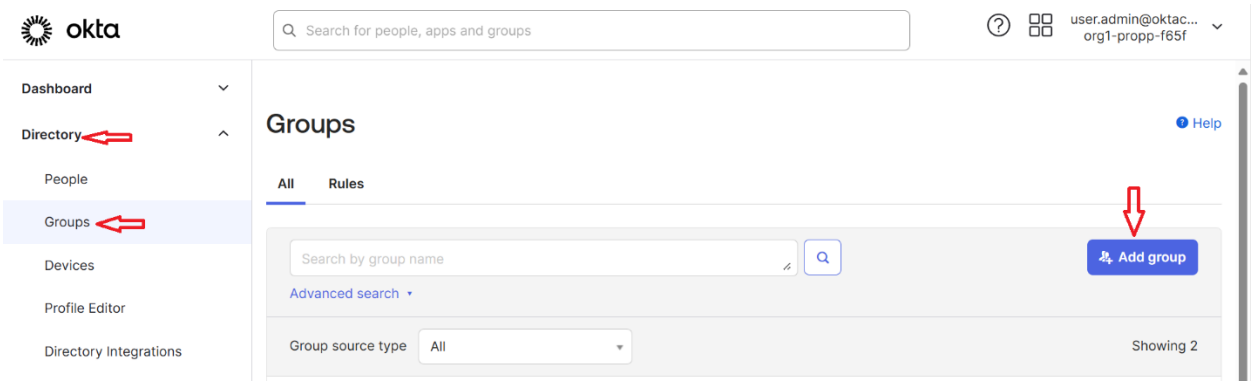


Remember to login as users to activate users accounts.

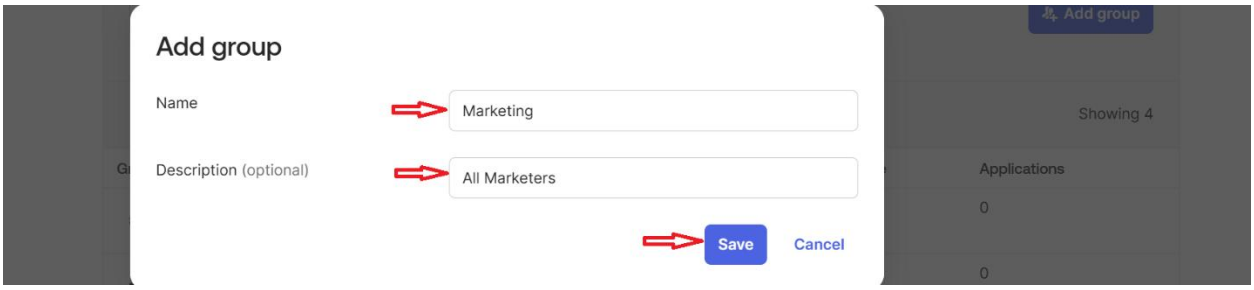


Create a group, Add users to group by rule, And also add users to group manually. Steps blow:

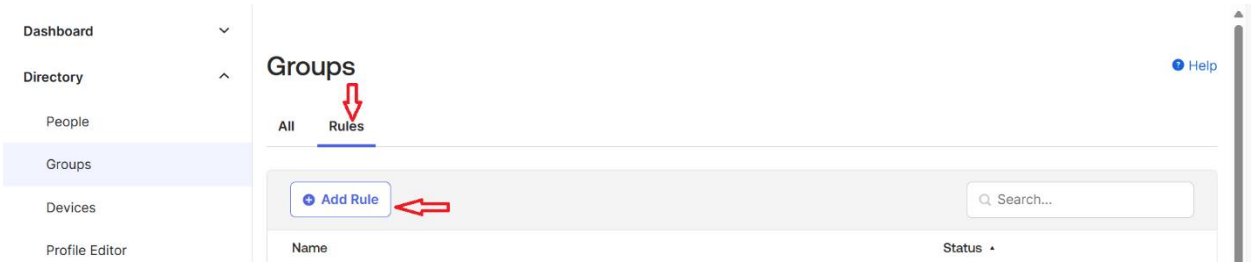
- From the portal, click on **Directory,** Click on **Groups** and then **Add group**



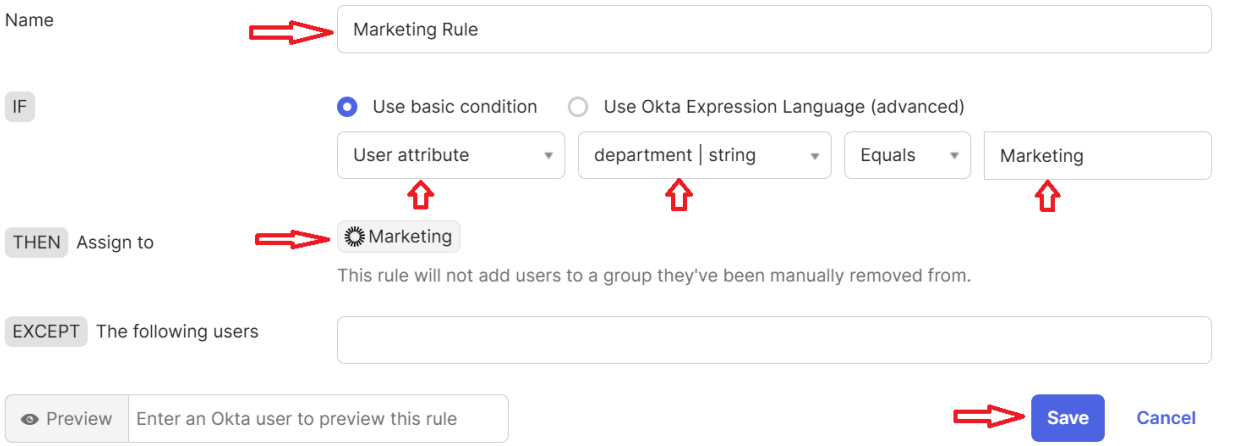
- Populate **Name, Group Description,** then click **Save**



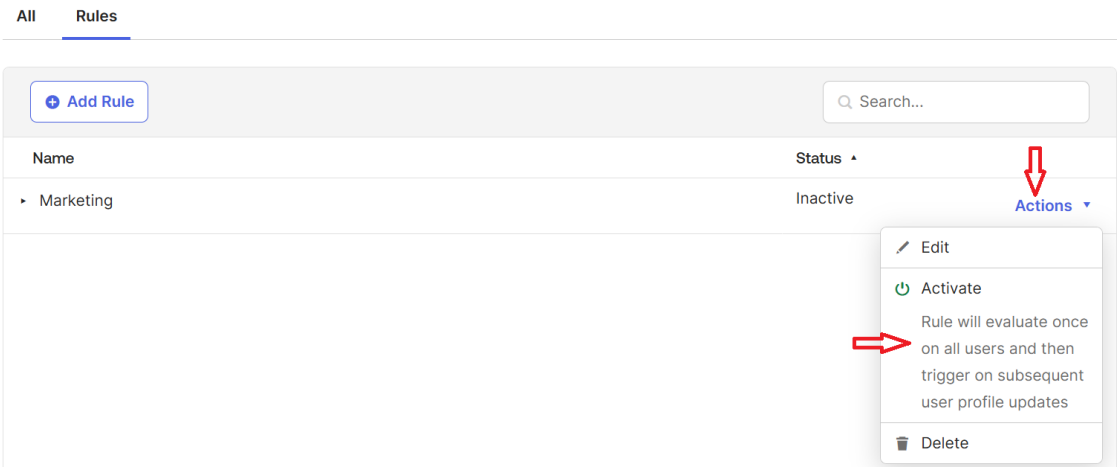
- click on **Rules,** then click **Add Rule**



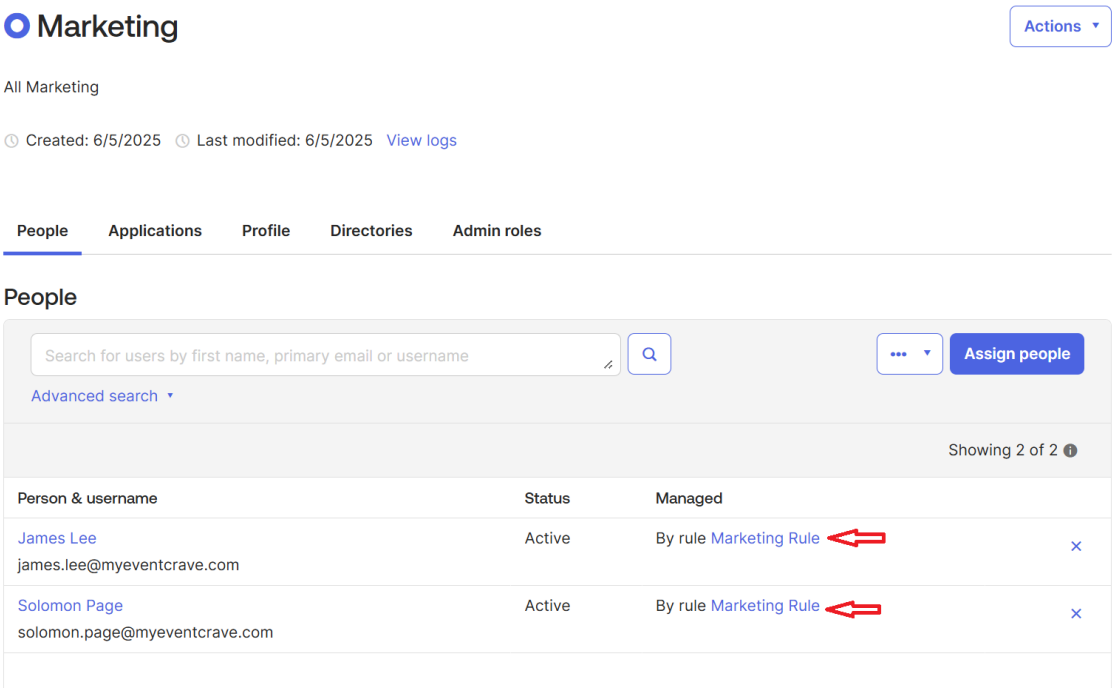
- Name: **Marketing Rule**, Select User attribute, select **department | string,** populate **Marketing,** Assign to **All Contractors,** Click on **save**



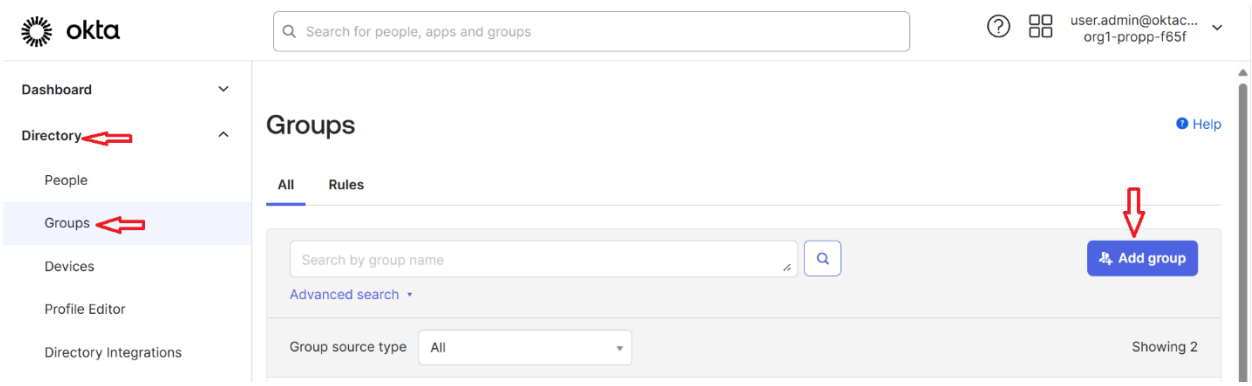
- Click **Action**, then click **Activate**



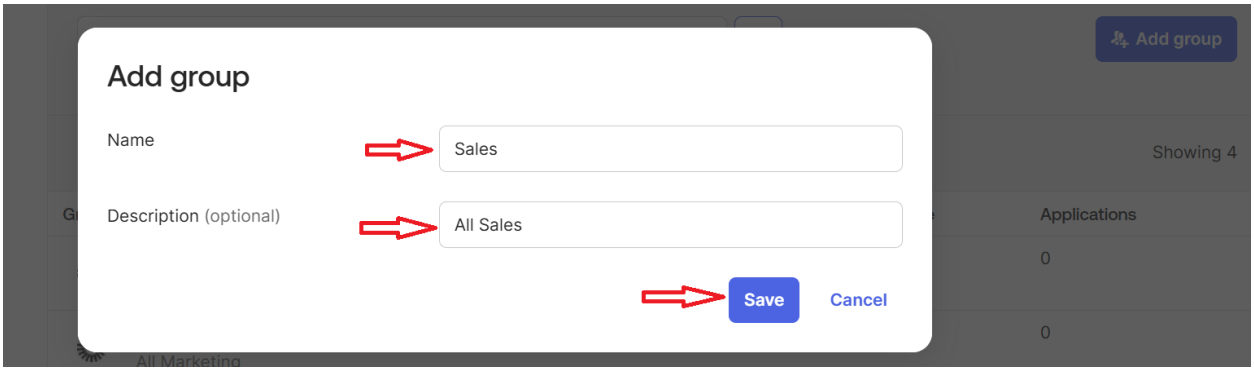
- Confirm users are added to **Marketing** group by rule



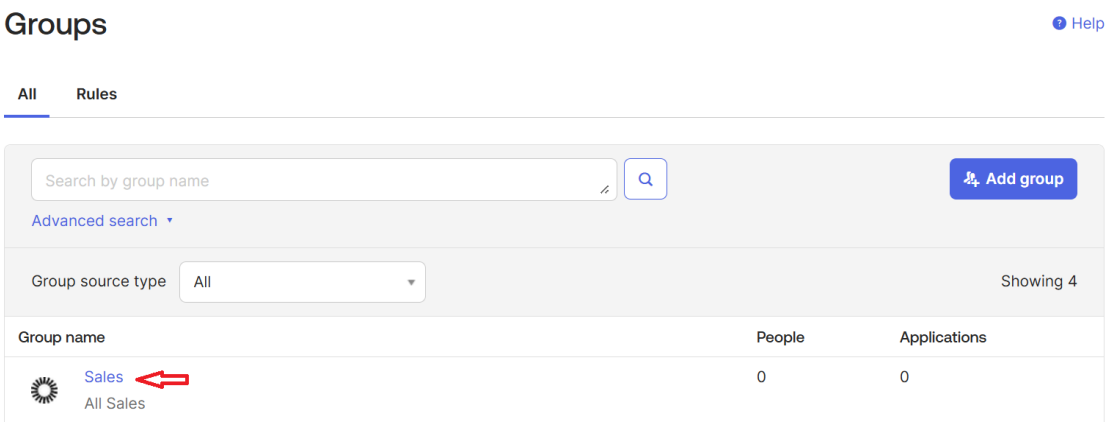
- From the portal, click on **Directory,** Click on **Groups** and then **Add group**



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

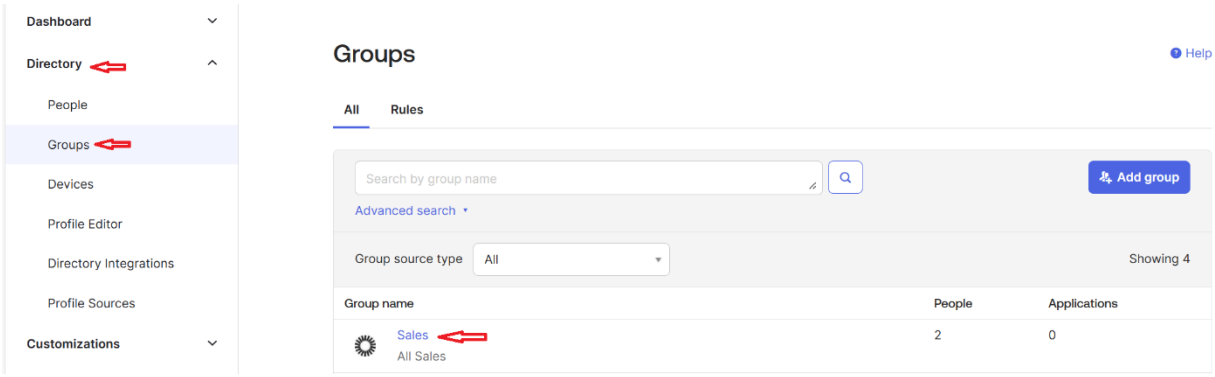


- Confirm group is created

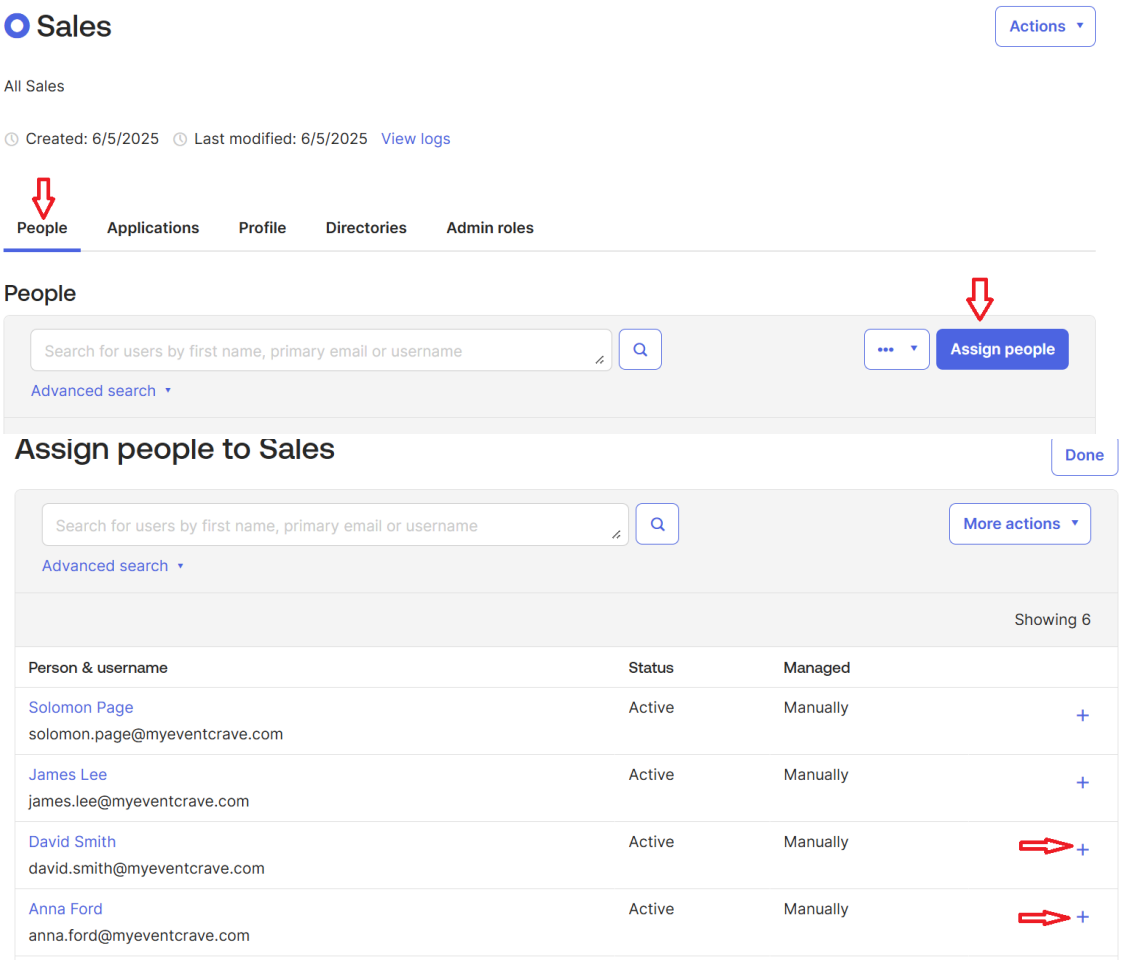
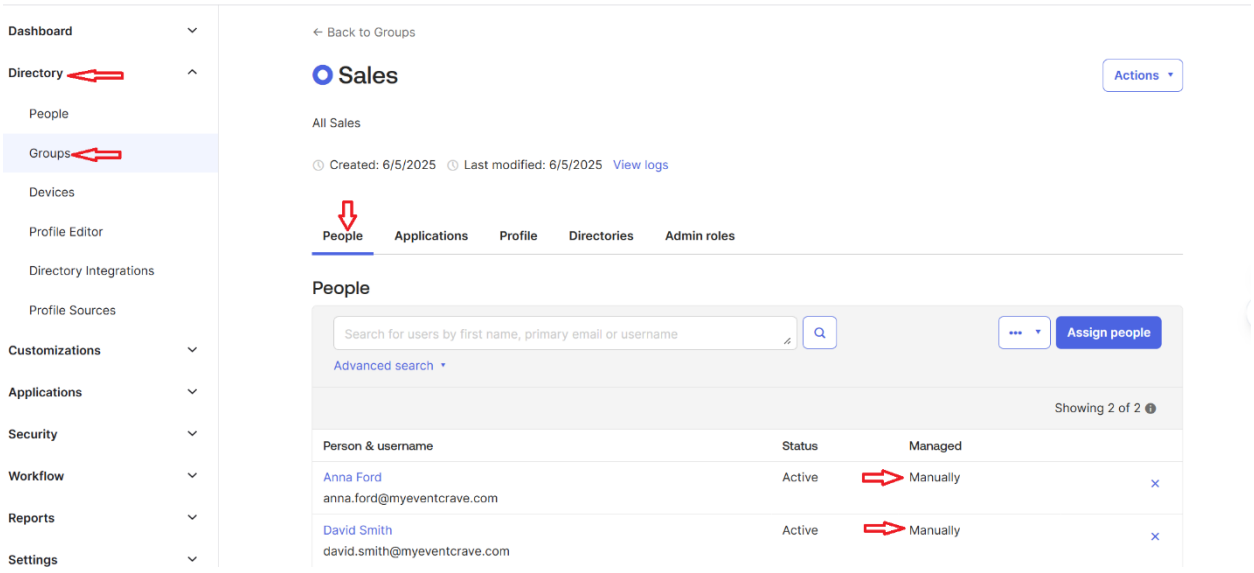


Assign users to group manually.

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



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



Confirm users were assign to group manually.