

System for Cross-domain identity management configuration

The document elaborates how to set up and use provisioning to sync users and groups from Okta to DevRev.

Overview

Provisioning users and groups from Okta to DevRev helps minimize the manual addition of each employee or group to DevRev. This process reduces administrative errors, saves time, and ultimately cuts costs.

The Okta to DevRev provisioning features streamline the following tasks:

- **Push New Users:** Users created in Okta are automatically added to DevRev.
- **Push Profile Updates:** Profile changes made in Okta are seamlessly synced to DevRev.
- **Push User Deactivation:** Deactivating or removing a user in Okta disables the user in DevRev.
- **Push Groups:** Groups created or updated in Okta are automatically reflected in DevRev.
- **Import Users:** Import users from DevRev SCIM and map DevRev users to their corresponding Okta User accounts.

Pre-requisites

1. Get admin access to the Okta dashboard.
2. Get admin access to the respective organization in DevRev.
3. SSO is enabled for the respective organization. For details see: <https://devrev.ai/docs/product/sso-saml>

Set up Provisioning in Okta

1. Set up DevRev SCIM app in Okta
 - If you haven't already, log into Okta as an admin, go to **Applications > Applications**.

- Go to DevRev SSO/SCIM App or SCIM 2.0 Test App from Catalog :

General settings- Required

Application label	<input type="text" value="DevRev"/>
This label displays under the app on your home page	
Connection Name	<input type="text" value="DEV-XYZ-devrev-okta-app"/>
Application Visibility	<input type="checkbox"/> Do not display application icon to users
	<input type="checkbox"/> Do not display application icon in the Okta Mobile App
<div>CancelDone</div>	

Fig1: Configure DevRev app

Enter a valid app name (ex: DevRev) and connection name configured while setting up SSO (<https://devrev.ai/docs/product/sso-saml#identity-providers>). Click Done.

- Add the integration and configure the basic details. Click on **Done**. Add Application username format as **Email**, since user email is a unique identifier in DevRev and treated as userName.

Credentials Details	
Application username format	Email
Update application username on	Create and update
Password reveal	<input type="checkbox"/> Allow users to securely see their password (Recommended)
<div>C Update Now</div>	

Fig2: Credentials Details for SCIM app.

- Under the **Provisioning** Tab, click on **Configure API Integration** and enable it.

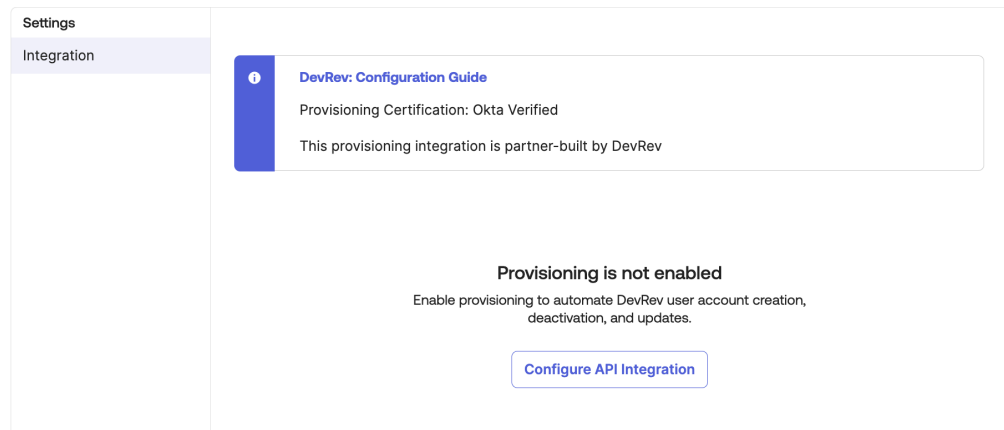


Fig3: Provisioning tab

- Click on **Configure API Integration**
- To fetch the API Token go to **Settings>Security** in your DevRev organization and **Enable SCIM**. Copy the API token value.

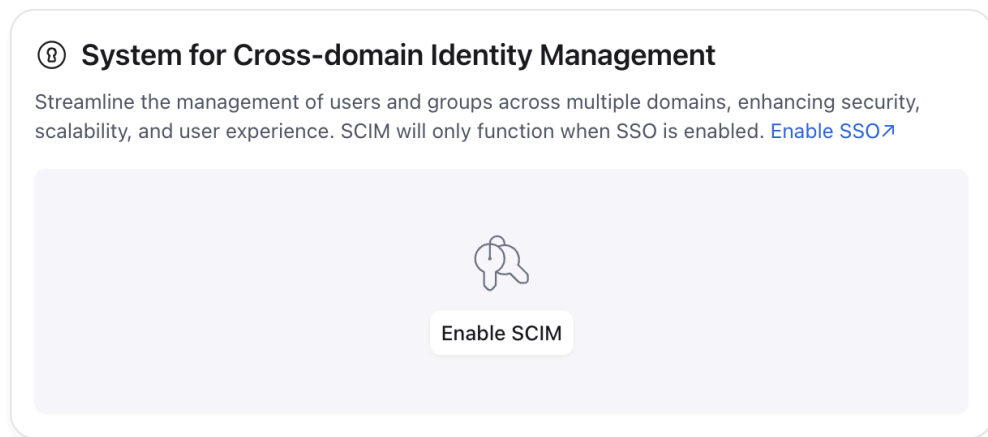


Fig4: Enable SCIM

8

System for Cross-domain Identity Management

Streamline the management of users and groups across multiple domains, enhancing security, scalability, and user experience. SCIM will only function when SSO is enabled. [Enable SSO](#)

Copy the base URL and API token and paste it in your identity provider. Make sure to copy your API token now. You won't be able to see it again!

Base URL

https://api.devrev.ai/scim/v2

Copy

API Token

Copy

Activated

Disable SCIM

Fig5: SCIM configuration details

- Paste the copied API Token to Okta. Test the API Credentials and click Save on success.

Settings

Integration

DevRev: Configuration Guide

Provisioning Certification: Okta Verified

This provisioning integration is partner-built by DevRev

Cancel

☒ Enable API integration

Enter your DevRev credentials to enable user import and provisioning features.

API Token

.....

Test API Credentials

Save

Fig6: Configure SCIM on Okta

Settings

Integration

DevRev: Configuration Guide

Provisioning Certification: Okta Verified

This provisioning integration is partner-built by DevRev

[Cancel](#)

DevRev was verified successfully!

☒ **Enable API integration**

Enter your DevRev credentials to enable user import and provisioning features.

API Token

.....

[Test API Credentials](#)

[Save](#)

Fig7: Test API Credentials

- Enable the below 3 options for the **To App** syncing in Okta
 1. Create Users
 2. Update User Attributes
 3. Deactivate Users

Settings

To App

To Okta

Integration

okta →

Provisioning to App [Edit](#)

Create Users ☐ Enable

Creates or links a user in DevRev when assigning the app to a user in Okta.

The [default username](#) used to create accounts is set to **Okta username**.

Update User Attributes ☐ Enable

Okta updates a user's attributes in DevRev when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in DevRev.

Deactivate Users ☐ Enable

Deactivates a user's DevRev account when it is unassigned in Okta or their Okta account is deactivated. Accounts can be reactivated if the app is reassigned to a user in Okta.

Fig8: Provisioning to App configuration.

- Following fields are supported for the Okta>DevRev sync, the rest of them can be removed by clicking on the cross button.











Attribute	Attribute Type	Value	Apply on		
Username userName	Personal	Configured in Sign On settings			
Given name givenName	Personal	user.firstName	Create and update		
Family name familyName	Personal	user.lastName	Create and update		
Email email	Personal	user.email	Create and update		
Primary email type emailType	Personal	(user.email != null && user.email != "") ? 'work' : "	Create and update		
Display name displayName	Personal	user.displayName	Create		
Show Unmapped Attributes					

Fig9: Okta>DevRev allowed fields for sync

2. Provisioning Users from Okta to DevRev

- Select the **Assignments** tab.
- Choose the **Assign** drop-down menu and select **Assign to People**.
- In the **Search...** box, enter the name of the user you want to send to DevRev.
- Select **Assign**.
- You can enter more details about the user. Select **Save and Go Back**.

The provisioned user in Okta would be created in **Shadow** state in DevRev. To locate the same, go to **Settings>Users**. It would become **Active** on login to the app.

Note:

- For email updates, DevRev uses the userName as the source of truth, as it's the unique identifier within DevRev. An email update in DevRev would be reflected by a userName change in Okta. Therefore, we expect users to update both their email and userName simultaneously.
- DevRev treats Display name as a user preference. Therefore, while it is synced upon initial user creation, subsequent updates from Okta will not modify it. This allows users to retain their preferred display names within the DevRev.

3. Provisioning Groups from Okta to DevRev

- Click to the top and click the tab for **Push Groups > Push Groups > Find Groups by name**.
- In the **Enter a group to push...** box, enter the group name and select it.

- Select **Save**.

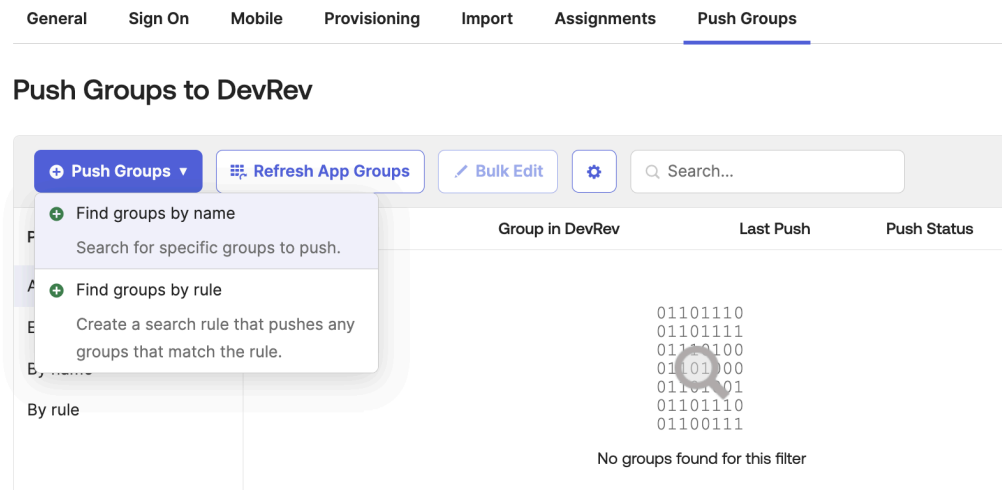


Fig10: Push Groups

The provisioned group in Okta would be created in DevRev with members associated with it. To locate the same go to **Settings>Groups**.

Note:

- Import functionality for Groups is currently not supported.
- DevRev has a unique constraint on Group names i.e more than 1 group can not have the same name. Hence, users should click on **Refresh App Groups** before pushing a new group to prevent an error if the group already exists in DevRev.

Troubleshooting and Tips

For questions, email support@devrev.ai and we would be happy to help.