

# Configuring Provisioning for PowerDMS

***This integration with Okta is currently under development and is not available to customers yet.***

This guide provides the steps required to configure Provisioning for PowerDMS.

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## Features

The following provisioning features are supported:

- Create Users
  - New users created through OKTA will also be created in the third-party application.
- Create Groups
  - New groups created through OKTA will also be created in the third-party application.
- Update user attributes
  - Updates made to the user's profile through OKTA will be pushed to the third-party application.
- Update group attributes
  - Updates made to the groups (and group memberships) through OKTA will be pushed to the third-party application.
- Delete groups
  - Groups deleted from Okta or unassigned from an application will be deleted from the PowerDMS database.
- Deactivate Users

- Deactivating the user or disabling the user's access to the application through OKTA will archive the user in the PowerDMS application.
- Note: For this application, deactivating a user means removing access to login but maintaining the user's PowerDMS information as an archived user
- Reactivate Users
  - User accounts can be reactivated in the application

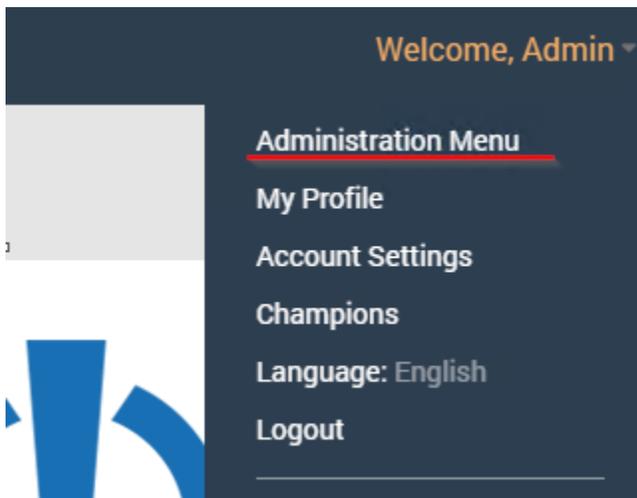
## Requirements

Before you configure provisioning for PowerDMS, you must reach out to the PowerDMS Support team to activate the feature. ([support@powerdms.com](mailto:support@powerdms.com)).

## Step-by-Step Configuration Instructions

To get started, reach out to the PowerDMS Support team and let them know you want to use Okta for user provisioning. ([support@powerdms.com](mailto:support@powerdms.com)). After that, you will need to acquire a token to configure provisioning.

1. Log in to the PowerDMS site.
2. Navigate to the **Administration Menu** in the upper right corner.



3. Navigate to the **User Sync section**.
4. In the form, you need to enter valid credentials for a user who has Site Administration privileges. *Note:* all actions performed during provisioning will be done on behalf of this user. Also, this user will be listed in the Event Log as one making changes.

- ▼ Site Configuration
  - ▶ Settings
    - Workflow Templates
  - ▶ Code Tables
    - Tags
    - Licensing
  - Standards Manual Communities
  - User Sync**
- ▼ Utilities
  - Document Export
  - PowerDMS Backup
  - Bulk Update Data
  - Document Conversion
  - Email Health Check

User Sync

JWT token:

Username:

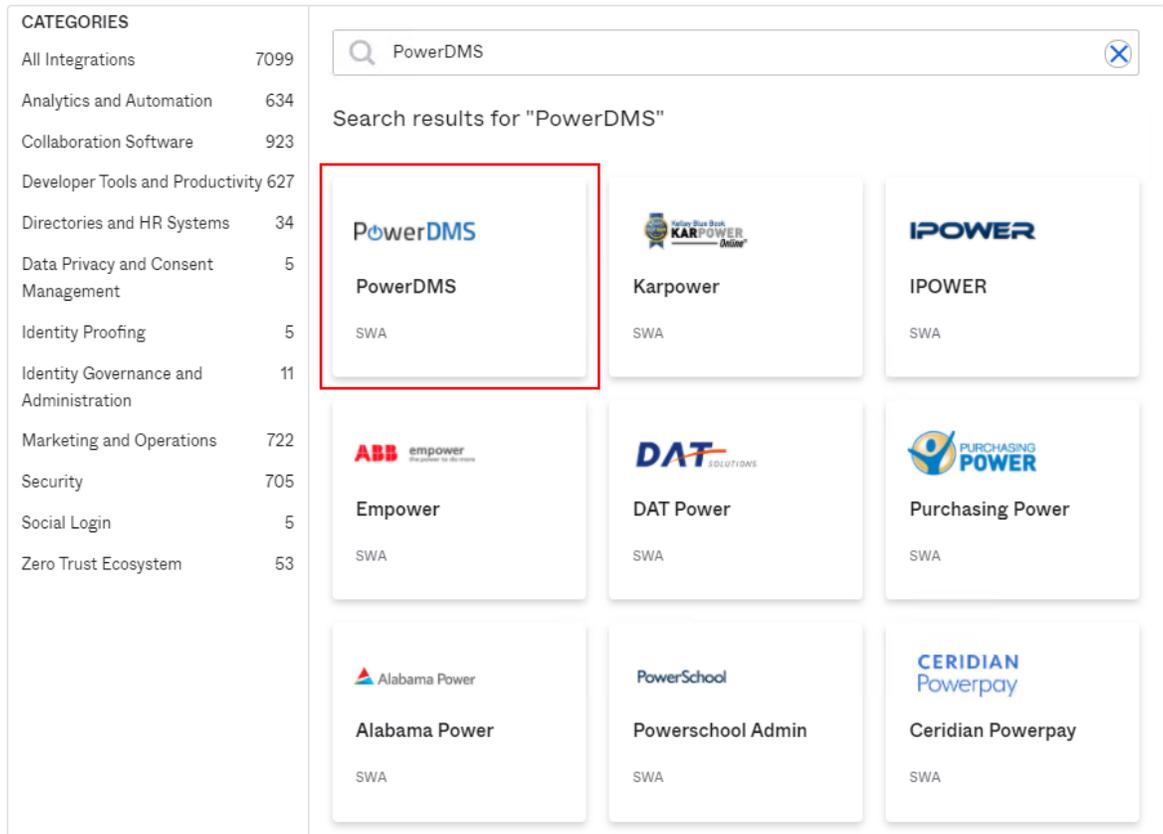
Password:

**Request JWT token**

5. Click **Request JWT Token**, and it will be output into **JWT token** textbox. It will be needed at a later step.
6. Create a new application in Okta. If you already created one - go to step #7. Choose the "PowerDMS" application in OIN Portal.

## Add Application

Create New App



The screenshot shows the 'Add Application' interface. On the left is a 'CATEGORIES' list with counts. On the right is a search bar containing 'PowerDMS' and a search button. Below the search bar, the text 'Search results for "PowerDMS"' is displayed. A grid of application cards is shown, with the first card, 'PowerDMS', highlighted with a red border. Other cards include Karpower, IPOWER, Empower, DAT Power, Purchasing Power, Alabama Power, PowerSchool Admin, and Ceridian Powerpay. Each card displays the application's logo, name, and 'SWA' status.

Category	Count
All Integrations	7099
Analytics and Automation	634
Collaboration Software	923
Developer Tools and Productivity	627
Directories and HR Systems	34
Data Privacy and Consent Management	5
Identity Proofing	5
Identity Governance and Administration	11
Marketing and Operations	722
Security	705
Social Login	5
Zero Trust Ecosystem	53

Search results for "PowerDMS"

- PowerDMS** (SWA)
- Karpower** (SWA)
- IPOWER** (SWA)
- Empower** (SWA)
- DAT Power** (SWA)
- Purchasing Power** (SWA)
- Alabama Power** (SWA)
- PowerSchool Admin** (SWA)
- Ceridian Powerpay** (SWA)

7. Set application name and provide site key for the application. If you are interested in registering an application as a Secure Web application - follow this [link](#) to configure the rest of the fields.
8. Open your app and navigate to **Provisioning > Integration**. Check **Enable API Integration**.
9. Fill the **API Token** field with the token obtained from step 5.
10. Click **Test API Credentials** to ensure the validity of configuration and **Save** the options.

**Settings**

Integration

**PowerDMS: Configuration Guide**

Provisioning Certification: Okta Verified

This provisioning integration is partner-built by PowerDMS

Contact partner support: support@powerdms.com

[Cancel](#)

**PowerDMS was verified successfully!**

**Enable API integration**

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

API Token

[Test API Credentials](#)

[Save](#)

11. Navigate to **Provisioning > To App**. Ensure that options “Create users,” “Update Users,” and “Deactivate Users” are enabled. Save the changes.

The screenshot shows the 'Provisioning' tab in the Okta admin console. At the top, there is a navigation bar with tabs: General, Sign On, Mobile, Provisioning (selected), Import, Assignments, and Push Groups. Below the navigation bar is a sidebar with 'Settings' and sub-items: 'To App' (selected), 'To Okta', and 'Integration'. The main content area is titled 'Provisioning to App' and features a diagram showing 'Okta' on the left and 'PowerDMS' on the right, connected by a right-pointing arrow. Below the diagram, there are three sections, each with a title, a description, and an 'Enable' checkbox:

- Provisioning to App** (Cancel button)
- Create Users** (Enable checkbox checked):  
Creates or links a user in PowerDMS 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 checkbox checked):  
Okta updates a user's attributes in PowerDMS when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in PowerDMS.
- Deactivate Users** (Enable checkbox checked):  
Deactivates a user's PowerDMS 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.

A blue 'Save' button is located at the bottom right of the configuration area.

12. You can now assign users and groups to the application.

## Adding more fields

If you want to add more fields to the provisioning, you need to do the following steps:

1. Go to the application > **Provisioning > To App**. Click on the “**Go to Profile Editor.**”
2. Add attributes to the Profile Editor as mentioned in the Okta [guide](#). An attribute's name must be compliant with the SCIM User schema [definition](#).
3. Map Okta attributes to Profile editor as described [here](#).

**Note:** Incorrect attributes (according to SCIM schema definition) will cause errors during provisioning. Following SCIM headers are not supported in the PowerDMS and will be ignored:

- honorificPrefix
- honorificSuffix
- nickName
- profileUrl
- country

- locale
- timezone
- userType
- employeeNumber
- costCenter
- organization
- division
- department
- managerValue
- managerDisplayName
- entitlements
- roles

## Troubleshooting Tips

- Initial activation of Okta provisioning in PowerDms requires contacting PowerDMS Support ([support@powerdms.com](mailto:support@powerdms.com)). Please reach out with any questions during your configuration process.
- PowerDMS does not support password sync.
- Note: When users are deactivated in Okta, they will be archived in PowerDMS. Users will not be able to login into the application, but their data will remain available as an 'archived user.'