

Configuring Provisioning for Plumm

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

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Features

The following provisioning features are supported:

- Push New Users
 - New users created through OKTA will also be created in the Plumm application.
- Push Profile Updates
 - Updates made to the user's profile through OKTA will be pushed to the Plumm application.
- Push User Deactivation
 - Deactivating the user or disabling the user's access to the application through OKTA will deactivate the user in the Plumm application.
 - Note: For this application, deactivating a user means removing access to login, but maintaining the user's Plumm information as an inactive user.
- Reactivate Users
 - User accounts can be reactivated in the application.

Requirements

Before you configure provisioning for Plumm, you must reach out to the Plumm Support team to activate the feature. (ramiz@plummhealth.com)

Step by Step Configuration Instructions

To get started, reach out to the Plumm Support team and let them know you want to use Okta for login and user provisioning. (ramiz@plummhealth.com) A Support representative will provide you with an API token specific to your organization.

1. Check the **Enable provisioning features** box.
2. Click **Configure API Integration**.
3. Check the **Enable API integration** box.
4. Enter the **API Token** provided by Plumm Support.
5. Click **Test API Credentials**; if successful, a verification message appears at the top of the screen.
6. Click **Save**.
7. Select **To App** in the left panel, then select the **Provisioning Features** you want to enable.

The screenshot shows the Okta administration console's provisioning settings for an application named 'Plumm'. The navigation tabs at the top are General, Sign On, Mobile, Provisioning (selected), Import, and Assignments. The left sidebar shows 'Settings' with 'To App' selected. The main content area is titled 'Provisioning to App' and includes an 'Edit' link. It features three sections, each with an 'Enable' checkbox:

- Create Users**: Enable. Description: 'Creates or links a user in Plumm when assigning the app to a user in Okta. The default username used to create accounts is set to Email.'
- Update User Attributes**: Enable. Description: 'Okta updates a user's attributes in Plumm when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in Plumm.'
- Deactivate Users**: Enable. Description: 'Deactivates a user's Plumm 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.'

8. Click **Save**.
9. select **Email** for the **Application username format** on the Sign On application tab in Okta.

Credentials Details

Application username format

Update application username on

Password reveal Allow users to securely see their password (Recommended)

i Password reveal is disabled, since this app is using SAML with no password.

Save

10. You can now assign people to the app (if needed) and finish the application setup.

Troubleshooting Tips

- Initial activation of Okta provisioning in Plumm requires contacting Plumm Support, (ramiz@plummhealth.com). Please reach out with any questions during your configuration process.
- Plumm does not support modifications to the username or email address.
- Note: When users are deactivated in Okta, they will be deactivated in Plumm. Users will not be able to login to the application, but their data will remain available as an 'inactive user'. To permanently delete user data, contact Plumm Support, (ramiz@plummhealth.com).
- **Disclaimer:** This integration with Okta is currently under development and is not available to customers yet. Contact Plumm Support (ramiz@plummhealth.com) to learn more.