Use Viva Goals from OKTA through AAD

The steps in the document will follow setting up [Microsoft Office 365 | Okta](#) for provisioning and federation of users from Okta to AAD. Please note that this is a plugin developed and maintained @by the OKTA team directly for the purpose of allowing setting up trust to federate and provision with AAD.

Pre-requisites

1. Purchase an AAD instance for your organization if you don't have one.
2. Ensure that you attach a domain with your AAD instance , which is not the same as the one you are going to federate. This will be the default domain on your AAD.
3. Create a Global Administrator account which is solely to be used for the purpose of enabling provisioning between OKTA and AAD.
4. Please create a user with the following roles in [admin.microsoft.com](#) and assign Global Administrator and Exchange Administrator privileges to the user. [Assign roles and permissions to users - Partner Center | Microsoft Learn](#)
5. Ensure that you have access to modify DNS records for your organization. If not, we suggest you get one for the purpose of setting up provisioning and federation.
6. Ensure that you are also an admin in your OKTA Idp
7. Please go to admin.microsoft.com as a Global Administrator or an Exchange Administrator user and verify the domain which you will use to sign on to Viva Goals. For example, if you want users like [john@contoso.com](#) with contoso.com domain to access Viva Goals, you will have to verify contoso.com domain. If you have a GoDaddy domain, azure ad will automatically update the DNS records but otherwise it would inform you to add the relevant TXT and DNS records in your domain entries. Please follow [Add a domain to Microsoft 365 - Microsoft 365 admin | Microsoft Learn](#) for exact steps.
   a. Once you add a domain, Microsoft 365 admin center will automatically make the newly added domain as your default domain. Please make sure to switch it back to your originally added domain to your AAD instance.

Setting up Federation and Provisioning

We are going to follow setup instructions as mentioned in [Microsoft Office 365 | Okta](#)

1. [Add Office 365 to Okta](#)
2. [Configure single sign on for Office 365](#)
3. [Provision users to Office 365](#) – Please follow [Provisioning options for Office 365 | Okta](#) to understand what all could be provisioned. You can also map the following as custom attributes apart from basic profile attributes.
   a. Department to user. Department
   b. Title to user. Title
4. Profile photos on Okta and Manager fields won't be synced from Okta to AAD
5. [Assign Office 365 to users and groups](#) – You can use these groups on the AAD side to attach Viva Goals / Viva Suite licenses and to control who should have access to Viva Goals
6. [Secure Office 365 using app sign-on policies](#)

Deprovisioning options for Office 355

Please follow [Deprovisioning options for Office 365 | Okta](#) to setup deprovisioning policies. We recommend that users and group provisioned from OKTA should not be modified locally in AAD or admin center. This might lead to inconsistencies and prevent proper provisioning.

OKTA Federation FAQs

Q: When an OKTA user is setting up a federation with AAD (Azure Active Directory) what will happen if the organization is already using AAD for another Microsoft product and some users are already available in it? Does the federation identify the existing users and update the data from OKTA, or will the records be duplicated?
A: The federation identifies the existing user from OKTA to AAD. There will not be any duplicate record in AAD.

Q: Do the email addresses in Ally.io need to match up with the email addresses in AAD?

A: No, the email addresses do not need to match up. Once, users are provisioned from OKTA to AAD. All the attributes will be mapped. Customers will be able to sign in by email with a new domain name in Viva Goals and other Microsoft 356 Office Apps.

Q: Do I need to have the Ally.io subscription un-federated from OKTA and change the emails before performing the migration?

A: No, you do not need to make a change in Ally, i.e. Once migration is performed – federating OKTA with Microsoft Office 365 and provision all users. Since OKTA is updated, those new user values will be provisioned in AAD. The updated users from OKTA will be pushed to AAD. The emails which are shown in the user's section in Ally.io should be the same emails that get federated and provisioned from OKTA to AAD.

[Office 365 integration FAQs | Okta](#)