



IDENTITY
AUTOMATION

People Module

Sponsored Accounts



Agenda

- 01 People Module Overview
- 02 Understand Sponsored Accounts
- 03 Sponsorship Attributes
- 04 Sponsorship Settings
- 05 Sponsorship Templates



People Module Overview

- Manage account Profiles via Delegations
- Enable self-service actions on the MY delegation type
- Enable Actions, including change password and reset authentication
- Override active/disable status
- People Module Settings & Configuration



Understanding Sponsored Accounts

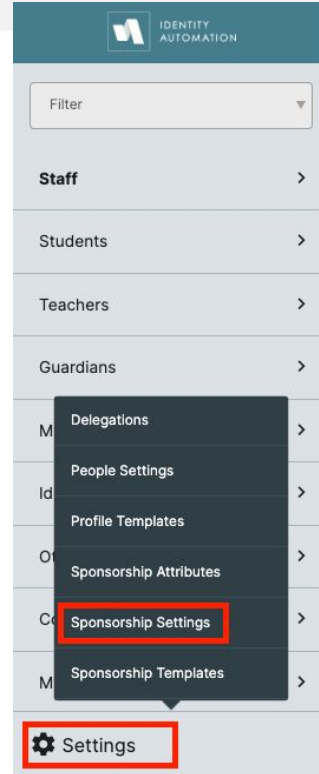
- Accounts that do not originate in SIS or HRMS
 - Generic Email Accounts
 - Contractors
 - Consultants
 - Service Accounts
 - Vendor Access Accounts
- Differences from SIS/HRMS Accounts
 - Have a Sponsor or Owner
 - Have an Expiration Date
- RapidIdentity Cloud
 - Out of the Box Accounts are in RapidIdentity Only
 - Can have Connect Logic to create AD, Google, O365, etc.

	FIRST NAME	LAST NAME	EMAIL ADDRESS	SPONSOR	EXPIRATION DATE	CLAIM CODE	EMPLOYEE TYPES	DEPARTMENT CODES
<input type="checkbox"/>	Test	Demo	TDemo@local	Rieland Kaseman	Tue Dec 20 2022	134454	Sponsored	101
<input type="checkbox"/>	jane	smith	jsmith@local	Rieland Kaseman	Tue Jan 17 2023	315465	Staff	
<input type="checkbox"/>	test	noexpire	tnoexpire@local	Rieland Kaseman	No Expiration			



Sponsorship Settings - General

- General
 - Expiration Date
- Sponsorship Naming Convention
 - Forward
 - Mbayless
 - Reverse
 - BaylessM
 - Email
 - Mbayless@email.com
- Naming Prefix/Suffix
- Preload
- Access Control



Sponsorship Settings

General | **Attributes** | Actions

Sponsorship General Settings

MAXIMUM EXPIRATION DAYS

90

REQUIRE EXPIRATION DATES

REQUIRE EMAIL ADDRESS

USER OBJECT NAMING CONVENTION

FORWARD

USER OBJECT NAMING PREFIX

c-

USER OBJECT NAMING SUFFIX

User Object Naming Suffix

PRELOAD SPONSORS

PRELOAD SPONSORED ACCOUNTS

ENABLE WILDCARD (*) SEARCHES

ACCESS CONTROL *

None

Cancel Save



Sponsorship Settings - Attributes

- Duplicate matching filter
 - First Name
 - Last Name
 - Email
 - UserName

The screenshot displays the Identity Automation interface. On the left, a sidebar menu lists various settings: Filter, Staff, Students, Teachers, Guardians, Delegations, People Settings, Profile Templates, Sponsorship Attributes, Sponsorship Settings (highlighted with a red box), and Sponsorship Templates. At the bottom of the sidebar, a gear icon labeled 'Settings' is also highlighted with a red box. On the right, the 'Sponsorship Settings' dialog box is open, showing the 'Attributes' tab. Under 'Sponsorship Attributes', there are four checkboxes: 'USE FIRST NAME IN DUPLICATE MATCHING FILTER' (unchecked), 'USE LAST NAME IN DUPLICATE MATCHING FILTER' (unchecked), 'USE EMAIL ADDRESS IN DUPLICATE MATCHING FILTER' (checked), and 'USE USER NAME IN DUPLICATE MATCHING FILTER' (checked). The dialog box has 'Cancel' and 'Save' buttons at the bottom.

Sponsorship Settings - Actions

- My Sponsored Accounts
 - Allowed Actions
- Other Sponsored Accounts
 - Allowed Actions

Refresh Delete Expire Certify Transfer Export Print

The screenshot displays the Identity Automation interface. On the left, a sidebar menu is visible with a 'Settings' icon at the bottom, highlighted with a red box. A dropdown menu is open from the 'Settings' icon, listing various options: Delegations, People Settings, Profile Templates, Sponsorship Attributes, Sponsorship Settings (highlighted with a red box), and Sponsorship Templates. The main content area shows a list of categories: Staff, Students, Teachers, Guardians, M, Id, O, C, M. On the right, a 'Sponsorship Settings' dialog box is open, showing the 'Actions' tab. It contains two sections: 'Allowed Actions - My Sponsored Accounts' and 'Allowed Actions - Other Sponsored Accounts'. Each section has a list of actions with checkboxes: CREATE ACCOUNT, EDIT ACCOUNT, TRANSFER ACCOUNT, EXPIRE ACCOUNT, CERTIFY ACCOUNT, and DELETE ACCOUNT. The 'My Sponsored Accounts' section has all actions checked, while the 'Other Sponsored Accounts' section has only 'CREATE ACCOUNT', 'EDIT ACCOUNT', and 'TRANSFER ACCOUNT' checked. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons.

Sponsorship Attributes

Identity Automation

Filter

- Staff
- Students
- Teachers
- Guardians
- My Team Profiles
- Delegations
- People Settings
- Profile Templates
- Sponsorship Attributes**
- Sponsorship Settings
- Sponsorship Templates
- Settings

Edit Attributes

LIST OF ATTRIBUTES

- Claim Code
- Claimed
- Mobile Numbers
- Job Title
- Account Type
- Usernames
- Birthdate

Edit Attribute

ATTRIBUTE: Claim Code

DISPLAY NAME: Claim Code

ALLOW EDITING

SHOW IN LIST

SHOW IN DETAILS

INCLUDE IN DUPLICATE ACCOUNT DET

Cancel Update

My Sponsored Accounts

Search My Sponsored Accounts

1 Result

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL ADDRESS	SPONSOR	EXPIRATION DATE
<input type="checkbox"/>	Melissa	Bayless	test@test.com	Melissa Bayless	Wed Nov 30 2022

Cancel Save

Sponsorship Attributes

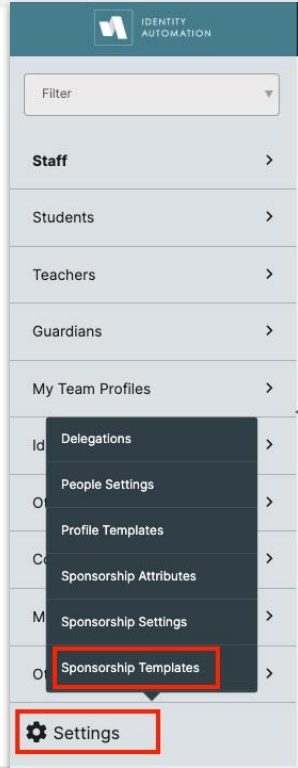
The screenshot displays the Identity Automation interface with several key components:

- Left Navigation Panel:** Contains a 'Settings' icon at the bottom and a dropdown menu with 'Sponsorship Attributes' highlighted.
- Central Panel:** Titled 'Edit Attributes', it lists various attributes such as 'Claim Code', 'Claimed', 'Mobile Numbers', 'Job Title', 'Account Type', 'Usernames', and 'Birthdate'. The 'Mobile Numbers' attribute is selected, and its configuration window is open.
- 'Edit Attribute' Window:** Shows the 'Mobile Numbers' attribute with the following settings:
 - ATTRIBUTE: Mobile Numbers
 - DISPLAY NAME: Mobile Numbers
 - ALLOW EDITING (highlighted with a red box)
 - REQUIRED
 - SHOW IN LIST
 - SHOW IN DETAILS
 - INCLUDE IN DUPLICATE ACCOUNT DETECTION
- Right Panel:** A 'New Person' form for creating a user profile, including fields for First Name, Last Name, Email Address, and Sponsor (Melissa Bayless).
- Buttons:** 'ADD PERSON' (blue), 'Save' (orange), 'Update' (orange), and 'Create' (orange).



Sponsorship Settings - Templates

- Automated emails on Sponsorship actions



Sponsorship Templates

7 Results

NAME	↑	DESCRIPTION
Add Account		This email message will be sent to the Sponsor when a new Sponsored Account is created.
Certify Account		This email message will be sent to the Sponsor when a Sponsored Account is Certified.
Delete Account		This email message will be sent to the Sponsor when a Sponsored Account is deleted.
Edit Account		This email message will be sent to the Sponsor when a Sponsored Account is edited.
Expiration Warning		This email will be sent to a Sponsor when they have at least one Sponsored Account expiring within a week.
Expire Account		This email message will be sent to the Sponsor when a Sponsored Account is expired.
Transfer Account		This email message will be sent to both the Old Sponsor and the New Sponsor when a Sponsored Account is transferred.



Questions

