

Create identities (manually, CSV file or authoritative source)

Description

You need to register the identities to manage and protect them. This wizard allows you to choose the easiest way to do it.

Step-by-step

1. First, you must select one option to register the identities. Soffid allows you three options.

Load identities

You need to register the identities to manage and protect. Here you have some ways to do it:

- ☐ Load from a CSV file
- ☐ Configure an authoritative data source to always have up-to-date information
- ☐ Register them manually

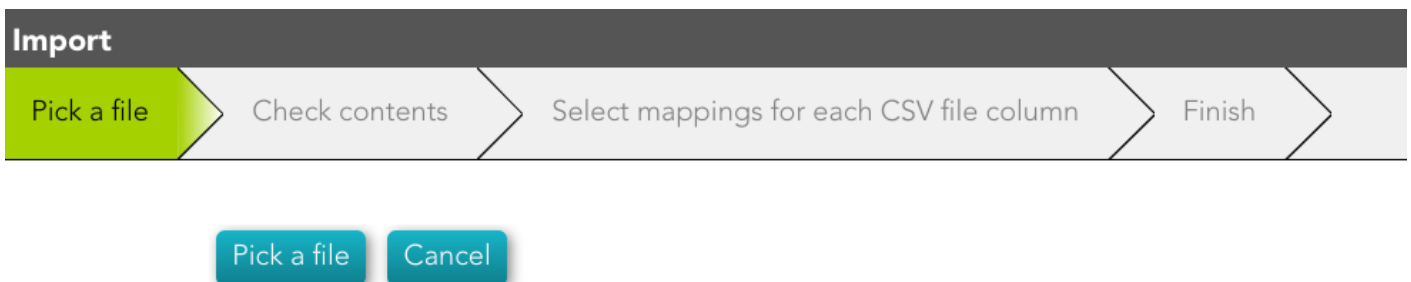
← Undo

Next

2. You must follow the steps, depending on the selected option:

2.1. Load from a CSV file: this option allows you to load identities from a CSV file.

2.1.1. First of all, you need to pick up the CSV file.



2.1.2. Second, Soffid will display the file data to check contents

Import

Pick a file

Check contents

Select mappings for each CSV file column

Finish

Character set :

UTF-8

Separator :

,

Quote character :

"

Escape character :

\

Contains header row :

Yes



Reload

Picture	User...	Full ...	Prim...	Ena...	Birth...	First ...	Last ...	Mid...	Type
	rfranklin	Rosalind Franklin	scientist	Si		Rosalind	Franklin		I
	aeinstein	Albert Einstein	scientist	Si		Albert	Einstein		I

← Back

→ Next

2.1.3. Then you must select the proper mapping for each CSV file column. And finally, click the Import Button and Soffid will add the identities to the platform.

Import

Pick a file

Check contents

Select mappings for each CSV file column

Finish


Select mappings for each CSV file column

CSV column	Target object attribute
Picture	Don't load
User name	User name
Full name	Full name
Primary group	Primary group
Enabled	Enabled
Birth Date	Don't load
First name	First name
Last Name	Last Name
Middle name	Middle name
Type	Type

Back

Import

2.1.4. Soffid will display the result of the process.

 soffid

Search

?

⚙

[Main Menu](#) > [Administration](#) > [Resources](#) > Users

User name Any

First name Any

Last Name Any

Primary group Any

Add criteria

Quick Basic Advanced

☐


▼ User name


⬆ Full name

⬆ Primary group

⬆ Enabled

Displayed rows: 0



 Added 0 new rows, 2 rows updated, 0 rows removed and 0 rows without any change

OK

2.2. Configure an authoritative data source to always have up-to-date information: this option allows you to configure an Active Directory agent, or a Relational database agent to load the identities.

For more information about the agents, you can visit [the Agents page](#).

Load identities

Please, select a the type of data source to fetch identities from

- ☐ Active Directory
- ☐ Relational database (SQL)

 Undo

Next

2.2.1. Active Directory

- To configure the AD connection you must fill in the required fields and click the Next button.
- Then Soffid will run the Authoritative load and the Reconcile process
- Finally, you could check the result on the [Scheduled tasks](#) page.

Configure connection

Load users information

Load users permissions

Active directory name :

dc=soffid,dc=pat

*

User name :

SOFFID\Administrator

*

Password :

●●●●●●●●●●



← Undo

→ Next

2.2.2. Relational database (SQL)

✱

❄



→ Next

?

3

*

*

- 100%
- 100%
- 100%

- **WED**
- **WED**
- **WED**

- **RED**
- **RED**
- **RED**

No

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