

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

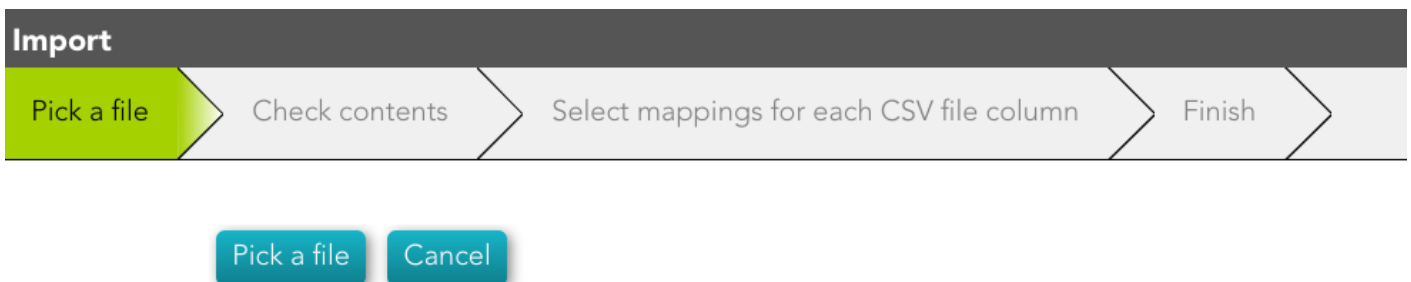
← Undo

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.



[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



Organization

*

- 100%
- 100%
- 100%

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

User status

- **WCD**
- **WCD**
- **WCD**

No

No

— — — — —

Revision #19

Created 17 February 2023 09:29:46 by pgarcia@soffid.com

Updated 30 May 2023 08:53:07 by pgarcia@soffid.com