

# Demo Outline 3 (Account Linking)

1. Configure CO Enrollment Flow
2. Existing person re-enrolls
3. Confirm email address
4. Authenticate with second ID
5. Login to application

## Background

This script utilizes two roles intended to demonstrate account linking using CManage Registry:

1. **U1**: An existing member of the Demo CO, with an existing login (**U1 login-1**) and a new login (**U1 login-2**) to be added.
2. **P1**: The Demo CO Admin

The login identity or EPPN (such as *foo@idp.protectnetwork.org* or *bar@internet2.edu*) associated with each role will be referred to as a "login" for short, eg: **U1 login**.

The "Demo IDMS" refers to the CManage Registry demonstration installation available at <https://demo.co.internet2.edu/registry>.

The "Demo Wiki" refers to the Dokuwiki demonstration installation available at <https://demo.co.internet2.edu/dokuwiki>.

## Presenter Requirements

The following must be done for each presenter once (not once per presentation):

1. Each presenter who will perform **P1** must have the organizational identity for the **P1 login** they will use for the demo added to or used to login to the Demo IDMS.
  - a. "Organizational Identities" -> "Add a New Organizational Person"
  - b. Be sure to add an email address (so the identity can be invited to *MyCO*).
  - c. Be sure to add the EPPN as an identifier and check the "login" box so it can be used to login to the Demo IDMS.
2. Each **P1 login** organizational identity must be invited to *Demo*.
3. Each **P1 login** MyCO identity must be added to the group *Demo:admin*.

## Pre-Demo Checklist

1. Remove the organizational identity **U1 login-2** from *Demo*.
2. Remove the *Link My Account* enrollment flows from previous demos.
3. Confirm **U1 login-1** exists and is valid.

## Browser Setup

It may facilitate the demo to use two different browsers. **U1** should use the presenter workstation's default browser, so clicking on the email link will work "intuitively". **U1** should also be logged into webmail to simplify receiving the confirmation link.

## Introduction (5 min)

1. roll call
2. validation of sound quality
3. review of purpose of the demo
4. pause for questions at end of every section

## Domain and Language (10 min)

1. Explain what we mean by account linking

## CManage Technical demo (25 min)

1. **P1** logs into Registry
2. **P1** retrieves **U1**'s CO and Org Identities, showing existing login identifier
3. **P1** creates a new Enrollment Flow
  - a. Name: **Link My Account**
  - b. Enrollment Authz: **CO Person**
  - c. Identity Matching: **Self**
  - d. Require Approval: **No**
  - e. Require Confirmation: **Yes**
  - f. Require Authentication: **Yes**
  - g. Define attributes
    - i. Name, Official, Org Identity

- ii. Email, Home, Org Identity
  - iii. Organization, Org Identity (with comment to type in name of identity provider)
4. **U1 login-1** logs into Registry
  5. **U1 login-1** executes new Enrollment Flow ("CO Enrollment Flows" > "Link My Account")
  6. **U1** checks email for link and clicks on it
  7. **U1 login-2** accepts invitation and authenticates to Registry
  8. **P1** retrieves **U1**'s CO and Org Identities, showing new login identifier
  9. **U1** attempts to login to some application? **XXX**

## Other

*Optional items if applicable to audience*

1. Discuss how to use linked identities

## Closing (10 min)

1. final questions
2. review utility of the demo - was this useful?
3. set up another call in 1-2 weeks to answer any questions that might have come up

## Post-Demo Checklist

1. If **P1 login** ordinarily has CMP Admin privileges (ie: is a member of *COmanage:admin*), but they were removed in the Pre-Demo Checklist, add a *COmanage:admin* group membership.
2. Perform the cleanups described in the Pre-Demo Checklist so they don't have to be done next time