

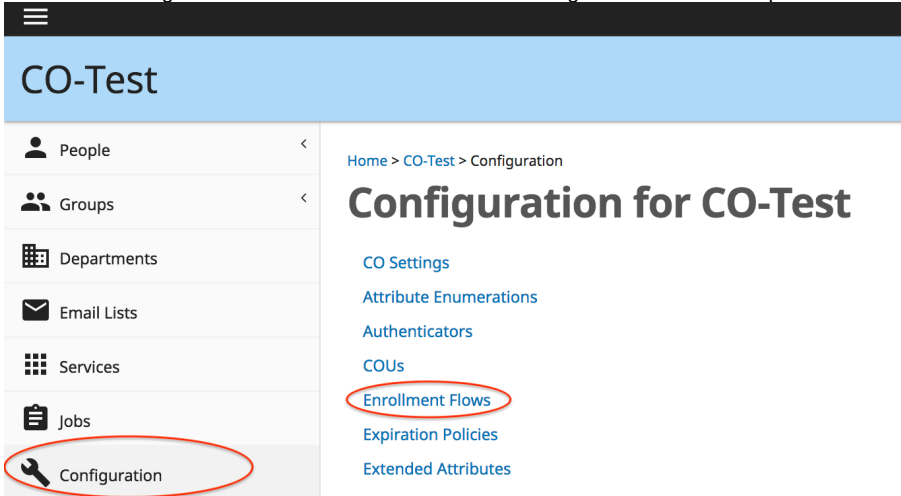
Example invite flow configuration

This example shows how to set up an enrollment based on an Invitation, using SAML as authoritative source. Please see [Configuring COmanage Enrollment Flows](#) for more details about configuring enrollment flows.

The key difference between self-signup and invitation flows is the fact that for invitation flows, COmanage creates a so-called Organisational-Identity (OI) based on the values entered by the petitioner (ie: the person starting the invitation enrollment). The values that petitioner uses for the invitation may not match the values passed by the identity-provider of the person invited (the enrollee). In order to store both types of values, COmanage needs at least two container objects (the Organisational Identities).

Howto setup the enrollment invite-flow?

1. Login to COmanage.
2. Click on your CO where you want to configure the flow.
3. Select the "Configuration" from the menu. And click on configuration. Select the option: Enrollment Flows.



4. Select the Invitation enrollment Flow (Template) and duplicate it before making adjustments.

Home > CO-Test > Enrollment Flows

Enrollment Flows Add Enrollment Flow Add/Restore Default Templates

Name	Status	Petitioner Enrollment Authorization	Actions
Account Linking (Template)	Template	CO Person	✓ Edit Duplicate Delete
Additional Role (Template)	Template	CO or COU Admin	✓ Edit Duplicate Delete
Conscription With Approval (Template)	Template	CO or COU Admin	✓ Edit Duplicate Delete
Invitation	Active	None	Begin ✓ Edit Duplicate Delete
Invitation (Template)	Template	CO or COU Admin	✓ Edit Duplicate Delete
Self Signup With Approval	Active	None	Begin ✓ Edit Duplicate Delete
Self Signup With Approval (Template)	Template	None	✓ Edit Duplicate Delete

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5. Click on Edit of the new created flow template and you can start with the configuration of the flow.

Enrollment invite-flow recommended configuration options

Edit Invitation (Template)

[Edit Enrollment Attributes](#) [Duplicate](#)

Name	Invitation (Template)
Status *	Active
Petitioner Enrollment Authorization <small>Authorization required to execute this enrollment flow, see Enrollment Authorization for details</small>	CO or COU Admin
Identity Matching <small>Identity Matching policy for this enrollment flow, see Identity Matching for details</small>	None
Require Approval For Enrollment <small>If administrator approval is required, a Petition must be approved before the Enrollee becomes active.</small>	<input checked="" type="checkbox"/> Require Approval For Enrollment Approvers: Members of this Group are authorized approvers (or else CO/COU admins by default)
Email Confirmation Mode <small>See Email Verification for mode definitions</small>	Review
Invitation Validity (Minutes) <small>When confirming an email address (done via an "invitation"), the length of time (in minutes) the confirmation link is valid for (default is 1 day = 1440 minutes)</small>	1440
Verification Email Message Template <small>Message template used for email sent as part of verification step</small>	<input type="checkbox"/>
Subject For Verification Email <small>Subject line for email message sent as part of verification step.</small>	Invitation to join (@CO_NAME)
Verification Email Body <small>Body for email message sent as part of verification step. Max 4000 characters.</small>	You have been invited to join (@CO_NAME). Please click the link below to accept or decline. {@INVITE_URL}
Require Enrollee Authentication <small>Require enrollee to authenticate in order to complete their enrollment</small>	<input checked="" type="checkbox"/> Require Enrollee Authentication
Duplicate Enrollment Mode <small>How to handle automatically detected duplicate enrollments</small>	Create New Role If Different COU
From Address For Notifications <small>Email address notifications will come from</small>	
Notification Group <small>Group to notify on new petitions and changes of petition status. (This is an informational notification. Separate notifications will be sent to approvers and enrollees, as appropriate.)</small>	
Notify On Approved Status <small>Notify enrollee when Petition is approved</small>	<input checked="" type="checkbox"/> Notify On Approved Status
Approval Email Message Template <small>Message template used for email sent as part of approval step</small>	<input type="checkbox"/>
Subject For Approval Email <small>Subject line for email message sent after Petition is approved.</small>	Petition to join (@CO_NAME) has been approved
Approval Email Body <small>Body for email message sent after Petition is approved. Max 4000 characters.</small>	Your petition to join (@CO_NAME) as been approved. You may now log in to the platform.
Notify on Finalization <small>Notify enrollee when Petition is finalized</small>	<input checked="" type="checkbox"/> Notify On Finalization
Finalization Email Message Template <small>Message template used for email sent after finalization step</small>	<input type="checkbox"/>
Introduction <small>Optional text to display at the top of a Petition form</small>	
Conclusion <small>Optional text to display at the bottom of a Petition form, before the Submit button</small>	
Terms and Conditions Mode * <small>How to handle Terms and Conditions at enrollment, if any are defined. See Terms and Conditions</small>	Ignore
Submission Redirect URL <small>URL to redirect to after Petition is submitted by someone who is not already in the CO.</small>	
Confirmation Redirect URL <small>URL to redirect to after the email address associated with the Petition is confirmed. Leave blank for account linking enrollment.</small>	
Finalization Redirect URL <small>URL to redirect to after processing of the enrollment has completed.</small>	
Return URL Whitelist <small>Permitted regular expressions (one per line) for return parameter, which if specified overrides Finalization Redirect URL</small>	
Theme	

[SAVE](#)

Important fields in this form:

- who can start the flow: administrators, or administrators of a specific COU
- require enrollee authentication (set 'on')

After configuring this form, perform the following steps:

- add enrollment attributes, copying attributes to either the OrgIdentity and/or the COPerson records. Please note that due to how invite flows work, the system cannot determine IdP attributes to fill out enrollment attribute defaults: the petitioner OrgIdentity is not the record you would want the defaults of, and the enrollee has not received any notification yet).
- add the SamlSource Organizational Identity Source (OIS). An option to manage OIS-es should be available at the top of the above configuration form (although not visible on this specific screenshot). Please see [Configuring CManage Enrollment Flows](#) for details on how to configure the relevant OIS