Agenda

- Discuss the "Why?"
- Review the User Record Expiration Process
- Review Configuration Options
- Discuss Implementation Considerations
- Review Lock Out after Failed Log-on Attempts Feature

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ATLAS SYSTEMS

Why Expire? User Record Expiration

User Record Expiration

Rationale for User Record Expiration

- Adding functionality to information that is currently available
- Provide updated user information for improved communication
- Provide updated user information for improved reporting





User Status and the System Manager A C - System Manager checks User Expiration Date every 12 hours Past expiration date = User Record Cleared Status will change to EXP or BLOCKED



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Primary Settings

AutoExpireUsers

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• On-Off Switch

- Should users automatically expire
- Valid Entries: Yes or No
- Default = **No** • If set to yes, User cleared status change to the value in AutoExpireUsersClearedValue

AutoExpireUsersClearedValue

- · The Cleared Status set when the User expires
- · Trigger to send users to update their profiles
- The default value = **EXP**
- Note: Used only when **AutoExpireUsers** is set to Yes
- Valid Entries: EXP (expired) or B (Blocked)

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Primary Settings

RenewedUsersClearedValue

- The Cleared Status set after users review and update their records
- Valid Entries: Yes or No
 - Default = No
 - No = User will need to be cleared after updating record
 Yes = User will not need to be cleared after updating record
- Used only when AutoExpireUsers = Yes

AutoUpdateExpiration

- · Determines if the expiration date will be updated after users update their records
- i.e. Reset the expiration date
- Valid Entries: Yes or No
- Default = **No**

Best Practice: Automated

- AutoExpireUsers = Yes
- AutoExpireUsersClearedValue = EXP
- RenewedUsersClearedValue = Yes
- AutoUpdateExpiration = Yes

After expiration date, user prompted for update upon log-in. After updating, the user record clears automatically & new expiration date is set.

Best Practice: Manual

- AutoExpireUsers = **Yes**
- AutoExpireUsersClearedValue = **EXP**
- RenewedUsersClearedValue = **No**
- AutoUpdateExpiration = No

After expiration date, user prompted for update upon log-in. After updating, the user record must be cleared by staff & new expiration date is set manually by staff.

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Caution

• AutoExpireUsersClearedValue = B

• RenewedUsersClearedValue = No

AutoUpdateExpiration = No

· Users would need to contact you to reinstate their record

You will need to clear the user after record update

Set to Yes if manually changing expiration date



Implement E	xpired User Page	
Copy ChangeUser	Information.html	
 Change name of c Edit as needed 	copy to ExpiredUsers.html	
• Add new entries t	o web validation table	
		1
	Demonstration	
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Implementation Considerations User Record Expiration ATLAS SYSTEMS



Summary

- Force Users to update contact and other user information
- New cleared value
- EXP = expired
- Not turned on by default
- Set to Expire or Block
- Can add alternate landing page for Expired users to update records
- Status-specific expiration

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