# Account reservation

## Description

The **Account Reservation Process** type is used to configure the use of privileges accounts. That type of process will be launched when the end-users want to connect to a system using a privileged account through the password vault.

Soffid allows you to configure XACML policies management, here you will be able to configure when the account reservation workflows should be launched.

> For more information about XACML you can visit the XACML Book.

You can use the default template included on Soffid BPM Editor and customize it with your business needs. Also, you can import a .pardef file with the process definition.

That process is defined by default with 4 steps, but you can add new, delete and update steps to customize your business process.

- Start
- Screen
- Apply changes
- End

> We will use two concepts to explain that process, identity, and end-user. Identity will be the identity or user that will be created, updated, or deleted in Soffid Console. The end-user will be the Soffid user who requests processes using the self-service portal.

## Process editor

- **Process name**: identifier name of the workflow. This name will be used to label the workflow for the end-user.
- **Process type**:  to use this BPM editor you need to select **Account reservation.**

- **Description**: a brief description of the workflow. When an end-user starts a workflow, this text will be displayed in the Actions log tab.
- **Initiators**: here you could configure the roles or the identities that could start a new workflow from the Console. E.g. "admin" identity, "SOFFID_ADMIN" role, both separated by comma ',' as "admin, SOFFID_ADMIN" or if you want to publish the workflow to everyone, you can use the text "tothom" or the character '*'.  The users who are initiators will be able to request that process from their self-service portal.
- **Managers**: here you could configure the roles or the identities that could perform tasks in the workflow as approve permissions or cancel the workflow.
- **Observers**: here you could configure the roles or the identities that could open the workflows in read-only mode.

# Process steps

> To view the detail of each available step, you can visit the Account reservation steps chapter.

# Attributes

You could add new custom attributes in the Attributes tab. The defined attributes will be used in the Steps tab to be mapped with the Soffid data.

There are customized templates depending on the Process Type selected, for the Process management type there are one attribute defined:

- **account**: user account name.
- **systemName**: target system to which the account will be connected.
- **loginName**: login name to connect to the target system.
- **server**:
- **owners**: users authorized to use this account.
- **until**: date until the users are authorized to use the account,

You can customize attributes to adapt the workflow to your business process.

# Actions

# Process actions

| | |
|---|---|
| **Save** | Allows you to save all changes included in the workflow. That workflow can be a new or an updated workflow. |
| **Save and Publish** | Allows you to save the changes performed in the workflow setup and also publish the workflow to be used in Soffid. After this action, the last version of the workflow will be available for the end-user (with the proper permissions) in the Soffid Console and Self-service portal. |
| **Cancel** | Allows you to quit the process editor without saving changes. Soffid will ask you for confirmation to exit without saving updates |

# Attribute actions

| | |
|---|---|
| **Add attribute** | Allows you to add a new attribute. When you click the button "Add attribute" Soffid will show the fields to fill in for the new attribute. It is mandatory to fill in the code to save the process.<br>The attribute updates will save when you click the button "Save" or "Save and Publish". If you cancel, the updates will not save. |
| **Delete attribute** | Allows you to delete a defined attribute. To delete an attribute you need to click the button with the subtraction symbol (-)  located next to the label field. The attribute updates will save when you click the button "Save" or "Save and Publish". If you cancel, the updates will not save. |
| **Add value** | Allows you to add a new value to the attribute. To add a new value you need to click the button with the add symbol (+) located at the end of the "Values" label.<br>The values updates will save when you click the button "Save" or "Save and Publish". If you cancel, the updates will not save. |
| **Delete value** | Allows you to delete a value to the attribute. To delete an attribute you need to click the subtraction symbol (-) located close to the value you want to delete.<br>The values updates will save when you click the button "Save" or "Save and Publish". If you cancel, the updates will not save. |

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