
BPM editor page

Description

BPM is a technology that allows modeling, implementing, and executing processes automatically to enhance efficiency and productivity in support of enterprise goals.

Soffid includes a BMP (Business Process Management) in its Smart Engine to provide useful workflows integrated with the processes and the policies.

The **BPM Editor Addon** allows you to create, configure and publish business processes very easily for the Soffid administrators.

The BPM Editor addon provides some templates to create new workflows, these templates depend on the process type selected when you are adding a new business process. Nowadays there are the following templates available:

- User management
- Permissions management
- Account reservation
- Permissions request
- Delegate roles

You can find additional information by visiting [Process types chapter](#).

Once a workflow is published with the proper configuration, the users with the correct permissions could start, approve or observe the workflow from the "My Request" option. You can find more información on [My Requests page](#).

When a workflow is deleted in the BPM editor, that workflow continues to be available to be executed. If you do not want that a workflow will be executed, you must disable that process on the "Business process definition" page. If you disable a workflow, processes initiated and pending can be finalized, but no longer than workflow could be started.

A workflow could be updated with a new version. Processes started with the previous version, will be performed with the previous definition (previous version). And the processes those start with the new version will be performed with the new version.

We will use two concepts to explain the 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** is referred to an user of Soffid that will request processes using the self-service portal.

Screen overview

The screenshot displays the Soffid console interface. On the left is a navigation sidebar with the Soffid logo and tagline 'Identity made simple'. The sidebar contains several menu items: ISS, IGA, AM, PAM, IRC, and ADV. The main content area shows a search bar at the top with the text 'Search in Soffid...'. Below the search bar is a breadcrumb trail: 'Main Menu > Configuration > Workflow settings > BPM editor'. To the right of the breadcrumb are buttons for 'Add new' and 'Import'. The main content area is a table with two rows: 'Process' and 'Request permissions'. At the bottom right of the table, it says 'Displayed rows: 1'.

Process
Request permissions

The screenshot displays the Soffid BPM editor interface. On the left is a navigation menu with categories like ISS, IAM, AM, PAM, and IRC, and sub-items such as 'My OTP devices', 'Resources', 'Tools', 'Configuration', 'Global Settings', 'Integration engine', 'Workflow settings', 'Configure Workflow engine', 'Business process definition', 'BPM editor', 'Security settings', 'Configuration wizard', 'Custom scripts', 'Web SSO', and 'Monitoring and reporting'. The main area shows a workflow diagram titled 'Request permissions' with a 'permission' attribute. The diagram starts with a 'Start' node, followed by a 'Request' task. From 'Request', there are two paths: one labeled 'Cancel' leading to an 'End' node, and another leading to a 'Grant permission' task. The 'Grant permission' task has an 'Approve' path leading to an 'Apply changes' task, and a 'Reject' path leading to an 'End' node. The 'Apply changes' task also leads to an 'End' node. The interface includes a search bar at the top, a breadcrumb trail 'Main Menu > Configuration > Workflow settings > BPM editor', and buttons for 'Save', 'Save and Publish', and 'Cancel'.

Related objects

1. [Configure Workflow engine](#) : where the workflow engine is configured
2. [Business process definition](#) : where workflows are published
3. [BPM editor](#) : where to create or modify workflows
4. [My tasks](#) : pending workflows where the user has to perform an action in order to continue their workflow.
5. [My requests](#) : The workflows that the user can initiate are listed here.
6. [My requests > Query request status](#) : to search for all processes started by oneself
7. [Process Search](#) : to search for all processes
8. [Metadata](#) : to add attributes to display in the search tables
9. [Scheduled jobs](#) : shows active workflows pending asynchronous tasks

Standard attributes

Processes list

The list of the processes already created or imported.

- **Process:** identifier name of the workflow

Summary tab

That area of the form displays the general information about the business workflow and the main operations to perform. The actions to perform are defined by flowing that link [Process editor actions](#)

- **Process name:** identifier name of the workflow. This name will be used to label the workflow for the end-user. BPM editor allows you to manage the process into folders, you can type the folder name following by "/" .


Image


Configuration: folder/name


Main Menu > Configuration > Workflow settings > BPM editor Add new Import

<input type="checkbox"/>	Process	☰
	/	
<input type="checkbox"/>	Users/Create a new user	

My request with the Users folder

 Query request status


 Create a new user

 Request roles massive

 Users

→ Create a new user

Users folder with the workflow

 Create a new user

- **Process type:** allows categorizing the process. There are three different types of processes, each one with its own template.
 - Use management: used to create and update identities and their attributes.
 - Permissions management: used to create, update and remove permissions and account to identities.
 - Permissions request: used to request permissions.
 - Account reservation: to use privileges account. In this case, initiators must be -nobody-, that is nobody can start the process directly.
 - Delegate roles: used to delegate permissions to other user.
- **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 and Selfservice. 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 '*'. When you are configuring an Account reservation process, that value must be -nobody-, that is nobody can start the process directly.
- **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.

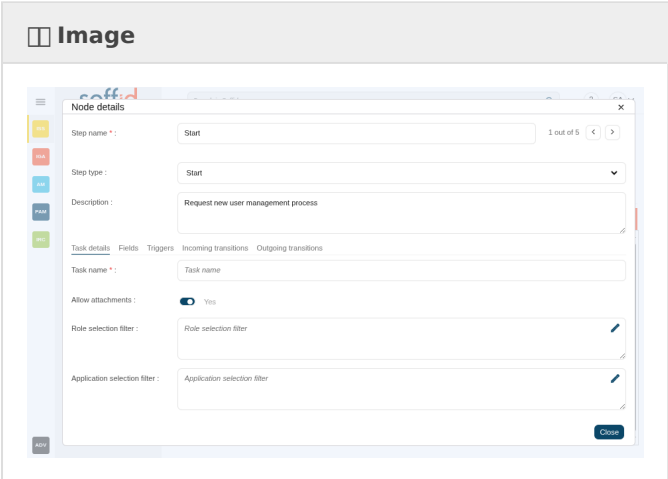
Diagram tab

This tab displays the workflow diagram. The editor allows you to perform many actions as edit a node, edit a transition, add nodes and transitions, or redistribute the diagram.

Steps

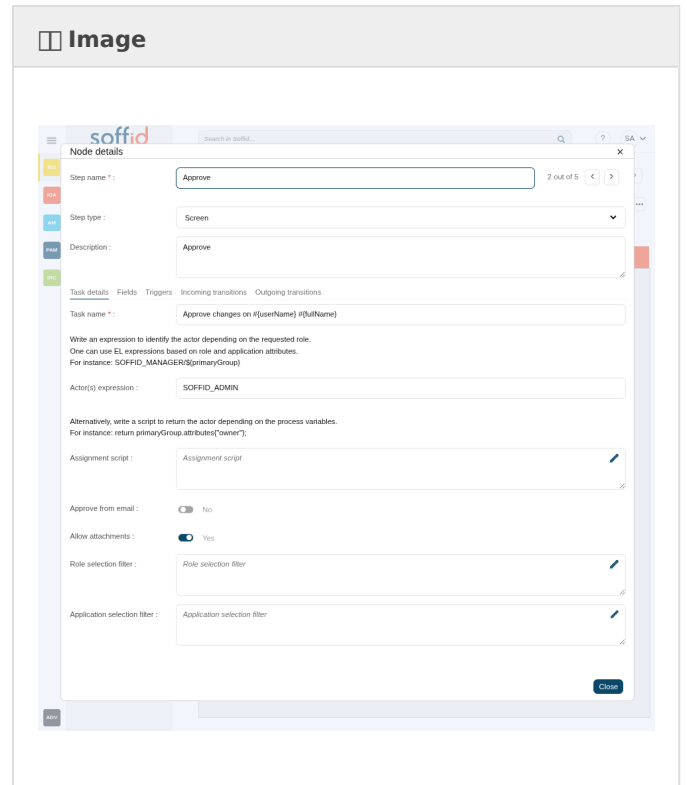
There are some available step types to define the properties and behavior of the process. Depending on the selected type, there are common properties to all types and specific properties for each one of them.

The workflows have default steps defined, those steps can be deleted or updated, and other steps can be added. Each step has detail to set up its properties and its behavior. The default steps are below:

<p>Start</p>	<p>This step is used to define the beginning of the workflow.</p> 
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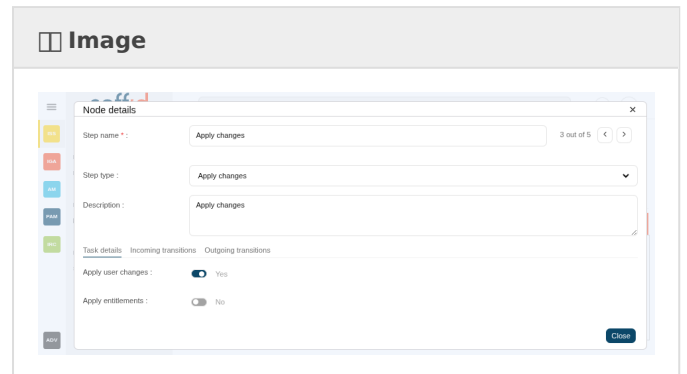
Screen

This step is used to define a form that must be filled in by the end-user.



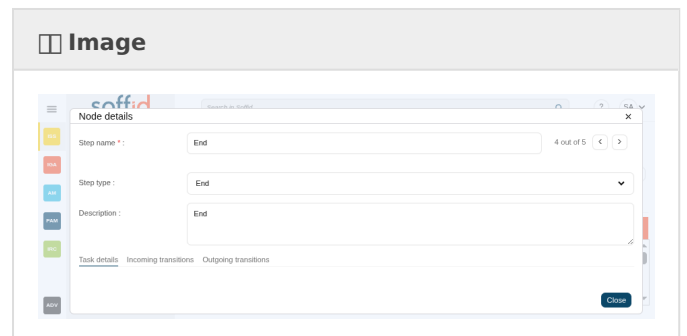
Apply changes

This step is used to show the manager a form with the changes that must be approved.



End

This step is used to define the finish of the workflow.



Other available steps to custom your business process:

Detect duplicated user

This step is used to detect duplicated users.

The screenshot shows the configuration interface for a step named 'Detect duplicated user'. The 'Step name' is 'Process node' and the 'Step type' is 'Detect duplicated user'. The 'Description' field is empty. Below this, there are tabs for 'Task details', 'Fields', 'User queries', 'Incoming transitions', and 'Outgoing transitions'. The 'Task name' field is empty. A section titled 'Write an expression to identify the actor depending on the requested role.' provides instructions on using EL expressions based on role and application attributes, with an example: 'SOFFID_MANAGER\${primaryGroup}'. Below this is the 'Actor(s) expression' field. Another section titled 'Alternatively, write a script to return the actor depending on the process variables.' provides instructions on using process variables, with an example: 'return primaryGroup.attributes.owner;'. Below this is the 'Assignment script' field. A final section titled 'In next tab, you can define many different queries to search for similar users, and each query has a weight. If a user is found in one or more queries, the weight of each one of these queries are added. If the total weight is equal or greater than current threshold, the user is considered a user match.' includes a 'Weight threshold' field. A 'Close' button is located at the bottom right.

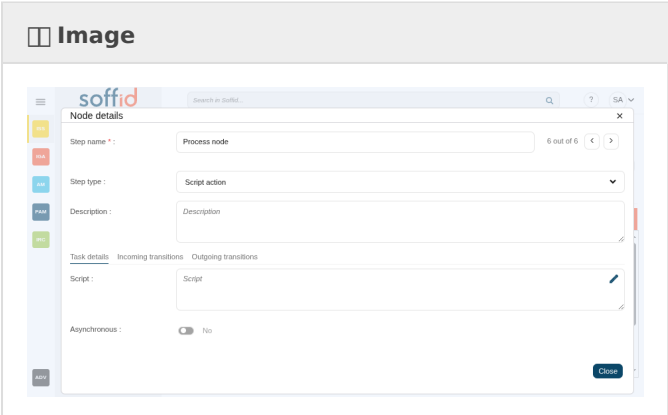
Grant approval

This step is used to show the manager a form with the changes that must be approved.

The screenshot shows the configuration interface for a step named 'Grant approval'. The 'Step name' is 'Process node' and the 'Step type' is 'Grant approval'. The 'Description' field is empty. Below this, there are tabs for 'Task details', 'Fields', 'Incoming transitions', and 'Outgoing transitions'. The 'Task name' field is empty. A 'Permission request screen type' dropdown menu is present. A section titled 'Write an expression to identify the actor depending on the requested role.' provides instructions on using EL expressions based on role and application attributes, with an example: '\$role.attributes[owner] or APPLICATION_OWNER\${application name}'. Below this is the 'Actor(s) expression' field. Another section titled 'Alternatively, write a script to return the actor depending on the requested role.' provides instructions on using task variables, role and application objects, with an example: 'return role.attributes[owner]; or return APPLICATION_OWNER+application name;'. Below this is the 'Assignment script' field. At the bottom, there is an 'Approve from email:' field with a toggle switch set to 'No'. A 'Close' button is located at the bottom right.

Script action

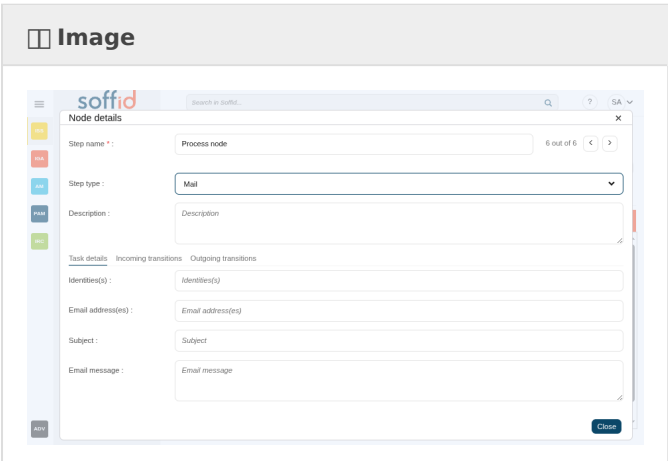
This step allows you to define a script to be executed at this point. This process can be configured as asynchronous.



The screenshot shows the 'soffid' Node details form. The 'Step name' is 'Process node' (6 out of 6). The 'Step type' is 'Script action'. The 'Description' field is empty. Under 'Task details', the 'Script' field is empty. The 'Asynchronous' checkbox is checked, with the label 'No' next to it. A 'Close' button is at the bottom right.

Mail

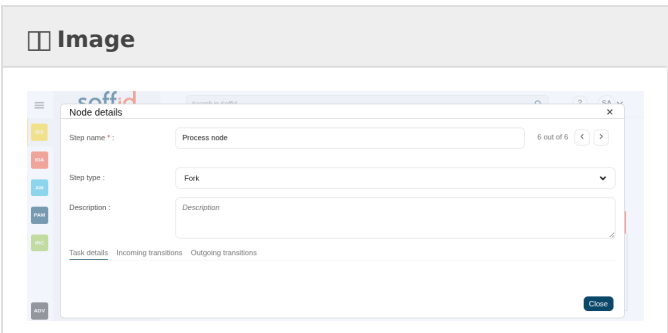
This step is used to configure sending mail.



The screenshot shows the 'soffid' Node details form. The 'Step name' is 'Process node' (6 out of 6). The 'Step type' is 'Mail'. The 'Description' field is empty. Under 'Task details', the 'Identifiers(s)', 'Email address(es)', 'Subject', and 'Email message' fields are empty. A 'Close' button is at the bottom right.

Fork

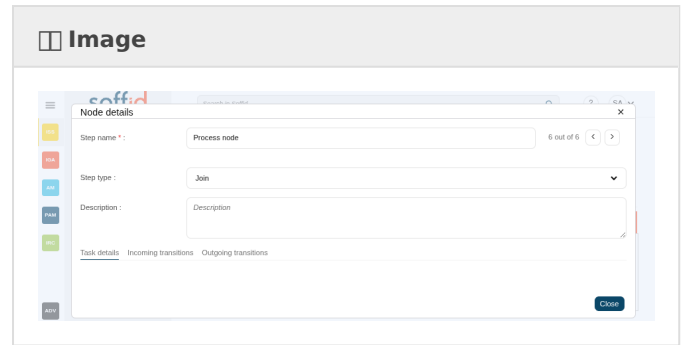
The process is split into two or more paths that are run in parallel, allowing multiple activities to run simultaneously.



The screenshot shows the 'soffid' Node details form. The 'Step name' is 'Process node' (6 out of 6). The 'Step type' is 'Fork'. The 'Description' field is empty. Under 'Task details', the 'Incoming transitions' and 'Outgoing transitions' fields are empty. A 'Close' button is at the bottom right.

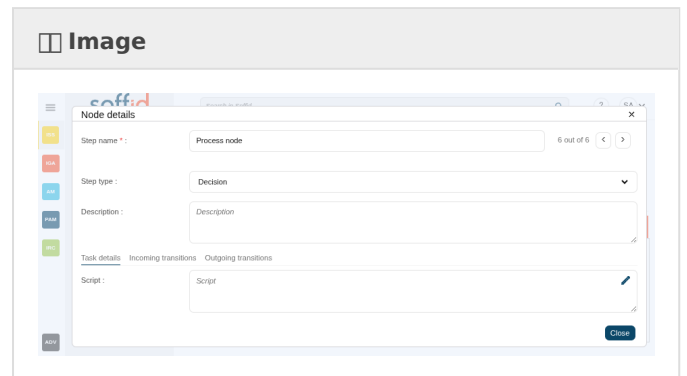
Join

Two or more parallel sequence flow paths are combined into one sequence Flow path.



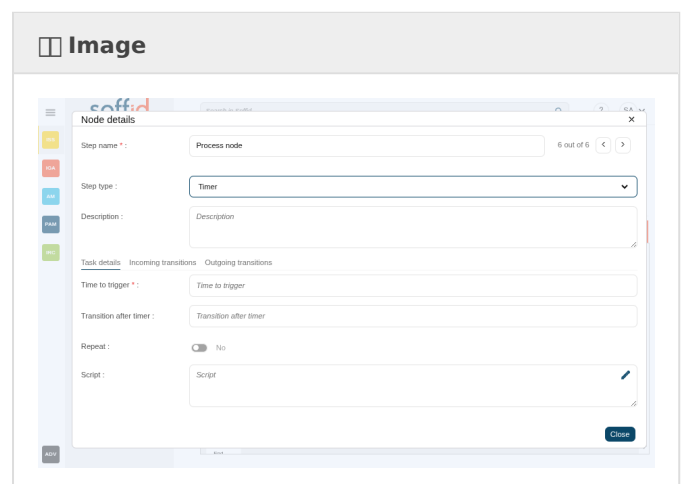
Decision

This step allows you to define a script to decide which will be the next step. You must configure the next step by typing the transition name as part of the return command (e.g. return "transitionName").



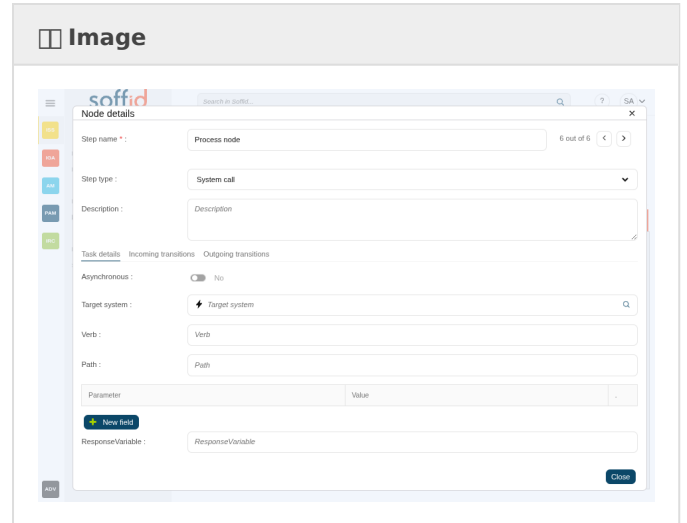
Timer

This option can be an independent node or as a part of an existing node. This allows you to determine the time to run the action. For Time to trigger field, the available options are hours, minutes, seconds, days, or a date `# {fecha}`



System call

This step allows you to set up a call to a specific system. You can find more information about the [Invoker for Shell connector](#) and the [Invoker for Active directory connector](#).



Step details

All steps have some detailed data:

- **Step name:** identifier name of the step.
- **Step type:** step to be configured.
- **Description:** a brief description of the step.

Step tabs

All steps have some tabs for more detailed configuration, the tabs depend on the step type:

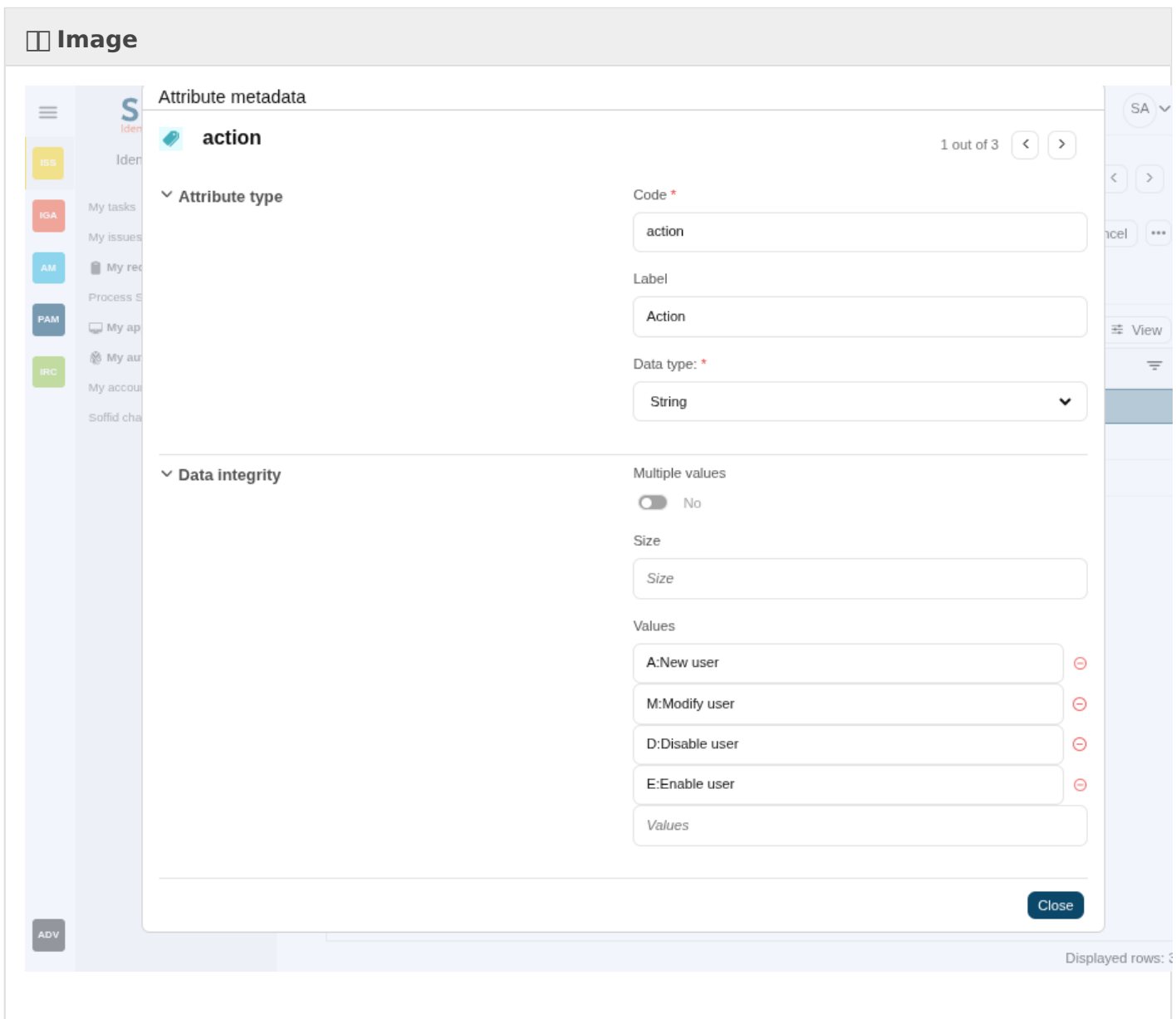
- **Task details:** tab with more custom attributes that depend on the step type
- **Fields:** objects attributes to be managed in the workflow form
- **Triggers:** scripts to be executed depending the trigger selected
- **User queries:** user queries
- **Incoming transitions:** tab to manage the incoming transitions and also manage actions
- **Outgoing transitions:** tab to manage the outgoing transitions and also manage actions

Attributes tab

The Attributes tab is allowed for creating custom attributes to be used to configure the workflow. The defined attributes will be used in the Steps tab to be mapped with the Soffid data.

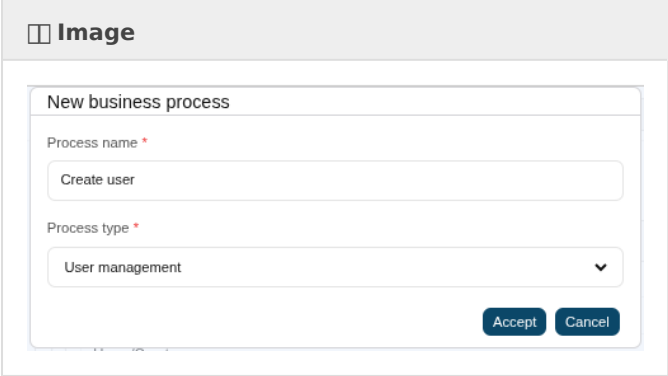
There are customized templates depending on the Process Type selected, those give you default attributes that you can customize.

- **Code:** code is used internally as an identifier by the system. Try to create a short one without spaces and with uppercase to separate words.
- **Label:** label displayed on the web page. This may be a name or a short description.
- **Data type:** data type of the value of the metadata attribute. The data type includes:
 - Basic data types as String or Boolean.
 - Extended data types as Photo or E-mail.
 - Default Soffid objects as User or Group.
 - Your own custom objects are created in Soffid.
- **Multiple values:** (Optional) If this flag is enabled, the metadata may contain more than one value.
- **Size:** (Optional) Set the maximum length of the value.
- **Values:** (Optional) Allows creating a set of values to provide to the user as a list.



Actions

Process list actions


Add new	<p>Allows you to add a new workflow to Soffid. You need to set a name and select the process type and accept. Then Soffid opens the Process editor, which allows you to configure the process. And finally, save the process configuration, or save and publish. If you cancel that operation, Soffid will not save the process definition.</p> 
Import	<p>Allows you to import a workflow from a .pardef file. That functionality is very useful for next scenarios:</p> <ul style="list-style-type: none">• To restore a workflow from a backup (a workflow previously exported).• To deploy a workflow from one environment to another (for instance from Test to Live).• To start a new workflow from a template. <p>Click the button, pick up a .pardef file, and save the process or save and publish. Soffid will ask you for confirmation, If you confirm, finally, Soffid will import the process definition. If you cancel that operation, Soffid will not upload and save the process definition.</p> <div data-bbox="815 1346 1485 1462" style="background-color: #f9e79f; padding: 10px;"><p>Note that with this option you only can load workflows defined by the BPM editor.</p></div>
"Edit process"	<p>Allows you to edit a workflow to update it by clicking the process row. Then you can update the process definition and save, or save and publish the updates.</p>
Delete process definition	<p>Allows you to delete a workflow. Select a process row to enable the delete button. When a process is deleted, that process continues to be available to be executed. If you want that process is not available, you must disable that process on the Business process definition page.</p>

Summary tab actions

The action that can be performed in the process are detailed below

Save	Allows you to save all changes included in the workflow. That workflow can be a new or an updated workflow.
Save and Publish	<p>Allows you to save the changes performed in the workflow setup and also publish the workflow to be used in Soffid.</p> <p>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 on the My requests page.</p> <p>This latest version has been saved internally on the Business process definition screen.</p>
Cancel	Allows you to quit the process editor without saving changes. Soffid will ask you for confirmation to exit without saving updates
Export process	Allows you to export a workflow to a .pardef file. You can choose that option clicking the "three points" icon. Automatically Soffid will download a .pardef file with the process definition.

Diagram tab actions

"Transition icons"	<p>Allws you to add or update transitions.</p> <ul style="list-style-type: none"> • Select • Pan • Connect • Connect <div data-bbox="810 1624 1484 1809" style="border: 1px solid #ccc; padding: 5px;"> <p>Image</p>  </div>
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"Edit icons"

Allows you to delete an existing step. To delete a step you must click "trash" icon, the last of the edit icons.

- Undo
- Redo
- Cut
- Copy
- Paste
- Delete

Image



"Step icons"

Allows you to add a new step to the workflow by selecting the action from the tool bar. When a new step is added, it will be mandatory to configure it.

- Start state
- End state
- Fork
- Join
- Decision
- System
- Node
- Task
- Mail
- Timer

Image



"Size icons"

Allows you to change the size view of the diagram.

- Zoom out
- Zoom in
- Fit
- Actual size

Image

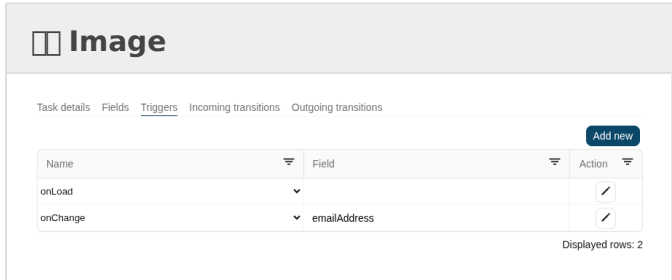


Diagram tab > step node > fields tab actions

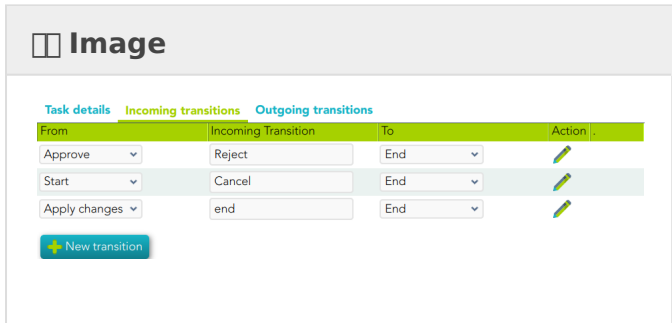
<p>Add new</p>	<p>Allows you to add a new attribute on the Attribute tab. You need to click the "New field" button and Soffid will show a new row to fill in. For each new field you may define:</p> <ul style="list-style-type: none"> • Label: allows you to give a name to that field. That label will be shown on the process form to final users. • Name: allows you to select an identity attribute or specific attribute defined for that process. That will be the field type (e.g. selector, input field, date field...) • ReadOnly: allows you to determine if this field could be updated. • Required: allows to enable an attribute as a mandatory • Validation: this allows you to add a custom script with validation rules. • Visibility: this allows you to add a custom script to determine the visibility of that field. • SCIM Filter: allows you to define a SCIM filter to get the data (e.g. userType eq "E") <div data-bbox="810 1178 1485 1467" data-label="Image"> <table border="1"> <thead> <tr> <th>Task details</th> <th>Fields</th> <th>Triggers</th> <th>Incoming transitions</th> <th>Outgoing transitions</th> </tr> <tr> <th>Ord#</th> <th>Label</th> <th>Name</th> <th>Read only</th> <th>Required</th> <th>Validation</th> <th>Visibility</th> <th>SCIM filter</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Action</td> <td>action</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>Select user</td> <td>userSelector</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td></td> <td></td> </tr> <tr> <td>3</td> <td>comments</td> <td>comments</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>	Task details	Fields	Triggers	Incoming transitions	Outgoing transitions	Ord#	Label	Name	Read only	Required	Validation	Visibility	SCIM filter	1	Action	action	<input type="checkbox"/>	<input type="checkbox"/>				2	Select user	userSelector	<input type="checkbox"/>	<input type="checkbox"/>				3	comments	comments	<input type="checkbox"/>	<input type="checkbox"/>			
Task details	Fields	Triggers	Incoming transitions	Outgoing transitions																																		
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<p>Delete</p>	<p>Allows you to delete a field. To delete a field you must click on the subtract icon (-) that is at the end of the same line.</p>																																					
<p>Order (icon)</p>	<p>Allows you to sort the fields using drag and drop.</p>																																					
<p>Validation (icon)</p>	<p>Allows you to add a new customized script with validation rules</p>																																					
<p>Visibility (icon)</p>	<p>Allows you to add a new customized script to determine the visibility of that field.</p>																																					

SCIM query (icon)	Allows you to define a SCIM filter to get the data
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Triggers

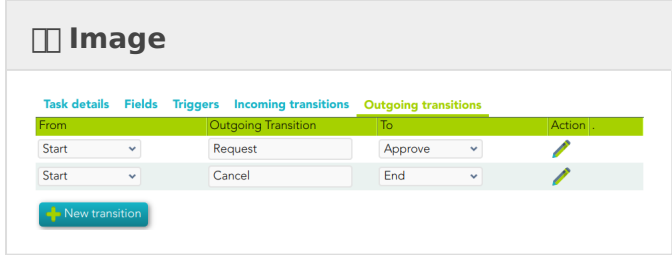
Add new	<p>Allows you to add a new trigger to perform actions.</p> 
Delete	Allows you to delete a trigger.
Action (icon)	Allows you to add a new customized script.

Incoming transition

New transition	<p>Allows you to add a new incoming transition. You need to click the "New transitions" button, then Soffid will show a new row to fill in. For each new incoming transition you may define:</p> <ul style="list-style-type: none"> • From: this allows you to select where the workflow comes from. • Incoming transition: brief name to identify the transition. • To: current step. • Action: allows creating a custom script to perform specific actions. 
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Delete transition	Allows you to delete an incoming transition. To delete an incoming transition you must click on the subtract icon (-) that is at the end of the same line.
Action	Allows you to add a new customized script by clicking the pencil icon.

Outgoing transition

New transition	<p>Allows you to add a new outgoing transition.</p> 
Delete transition	Allows you to delete an outgoing transition. To delete an outgoing transition you must click on the subtract icon (-) that is at the end of the same line.
Action	Allows you to add a new customized script by clicking the pencil icon.

Attributes tab actions

Add new	Allows you to add a new attribute to use to configure the step.
View	<p>Allows you to show and hide columns in the table.</p> <p>You can also set the order in which the columns will be displayed.</p>
Delete	Allows you to delete an attribute. To enable the delete button you must select one attribute.
Add value	Allows you to add a new value to the attribute.
Delete value	Allows you to delete a value. To delete a value you must click on the subtract icon (-) that is at the end of the same line.

Resources tab actions

Upload resources	Allows you to add files in a zip file as external resources to be used in the scripts
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Others

Workflow to import as examples

- User management --> [User.pardef](#)
- Permissions management --> [Permissions+request.pardef](#)
- Account reservation --> [Account+reservation.pardef](#)
- Permissions request
- Delegate roles

Revision #38

Created 4 June 2024 13:25:39

Updated 10 March 2026 07:49:38 by David Gómez