Delegation Roles

Description

The **Delegation Roles Process** type is used to allow the users to delegate temporary their own permissions.

That process is defined by default with 3 steps, but you can add new, delete and update steps to customize your business process.

- Start
- Apply changes
- End

You could add new steps, delete steps, and custom steps to define your process workflow.

> 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 **Use management.**
- **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 '*'. 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 Delegation roles 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 is one attribute defined:

- **grants**: allows you to select an information system and assign or revoke permissions.
- **userSelector**: allows you to select an existing identity. That component will be available when the action selected will be "Enable user", "Modify user" or "Disable user", in other cases, that component will not be displayed. That component allows to end-user to search identities by writing in an input field o searching with the searching view.

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. 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. 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. 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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