User management

Description

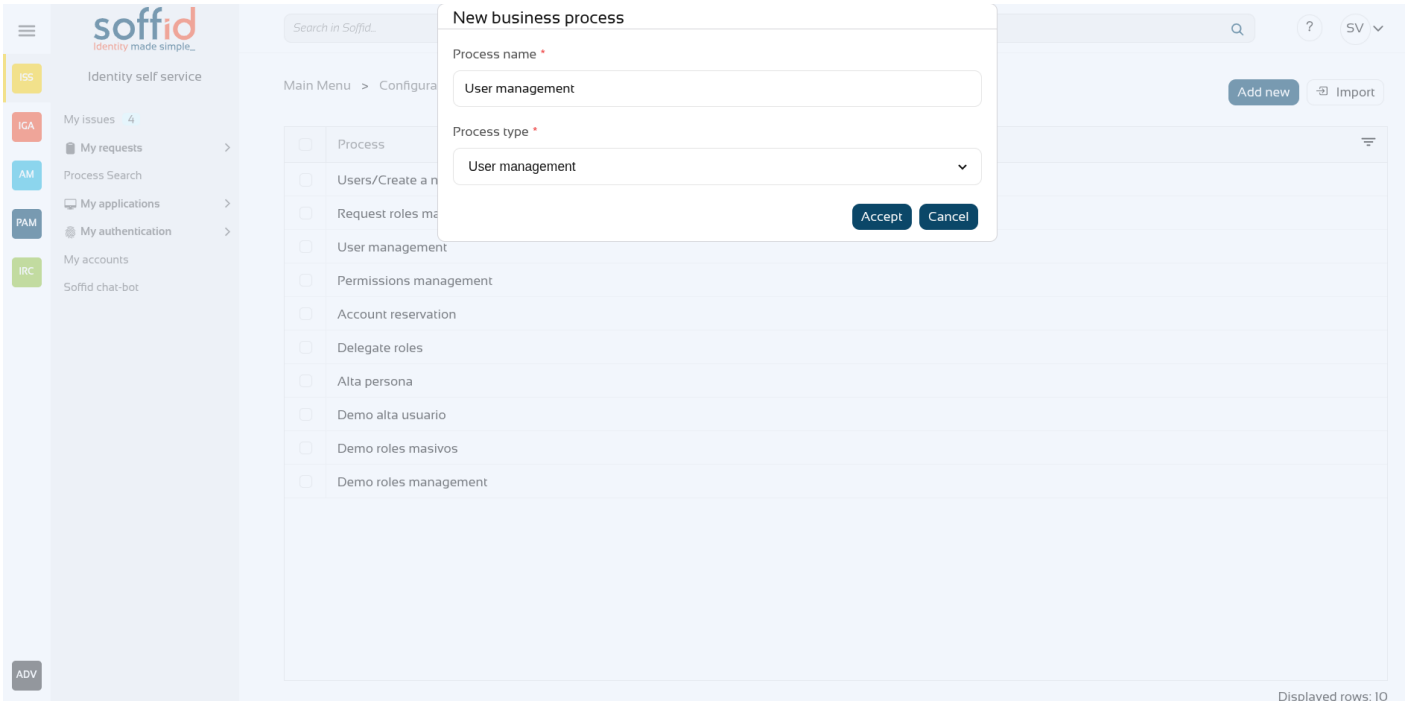
The **User Management Process** type is used to define business processes to create and update identities and their attributes.

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.

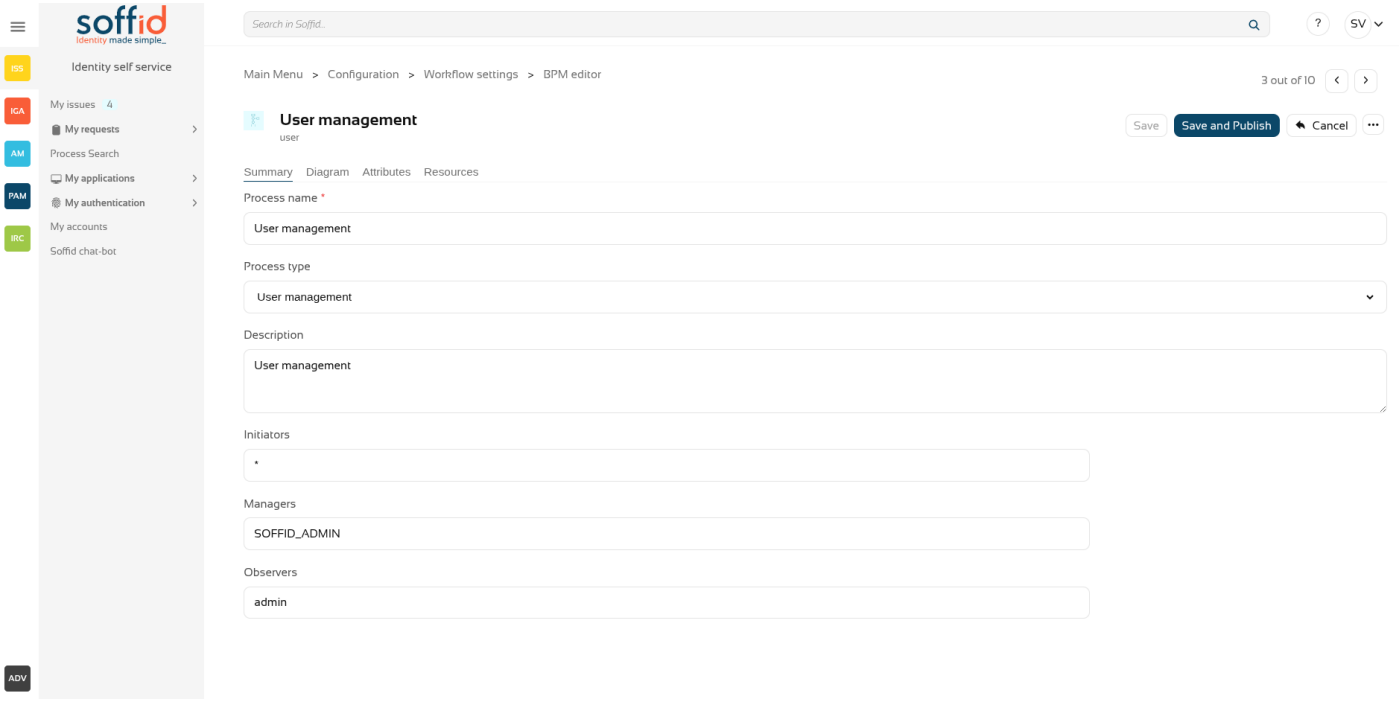
- Start
- Screen
- Apply changes
- End

> 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.



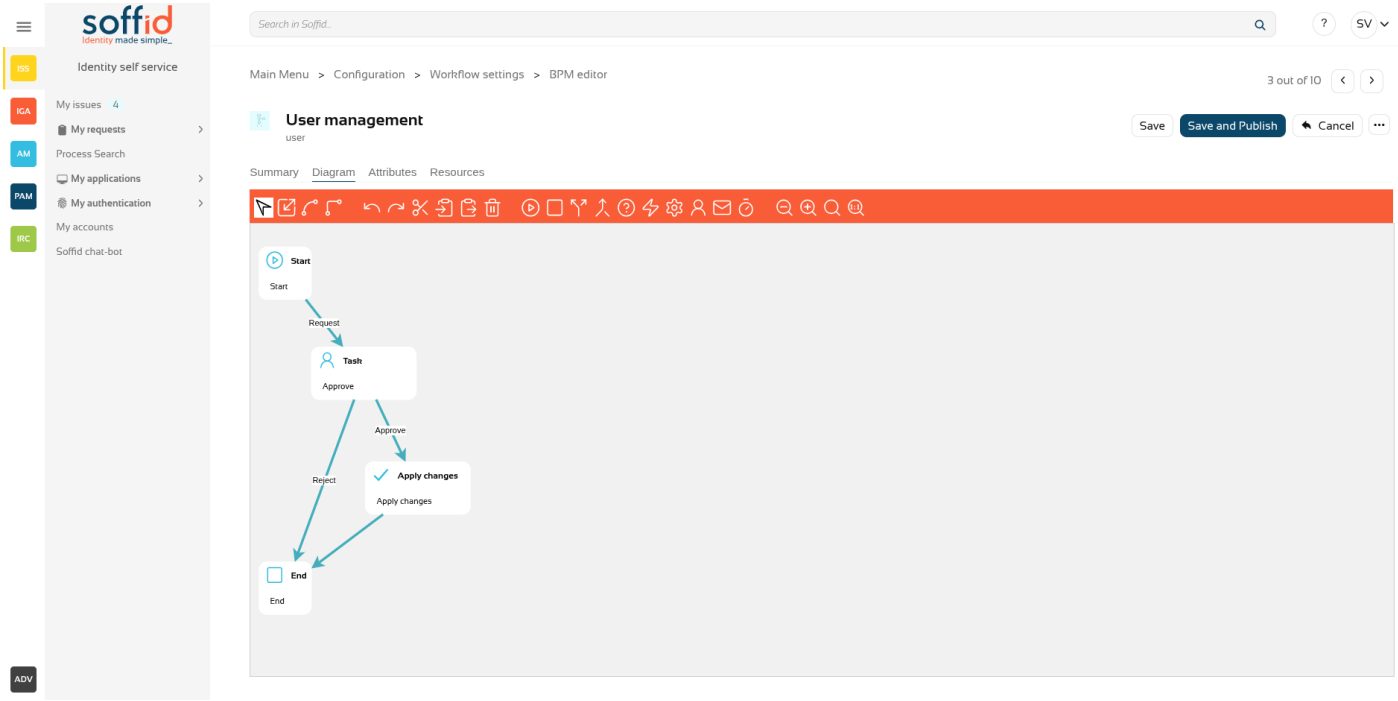
Process editor

- **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 **User 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 see and start this process from their identiry 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 User management steps chapter.



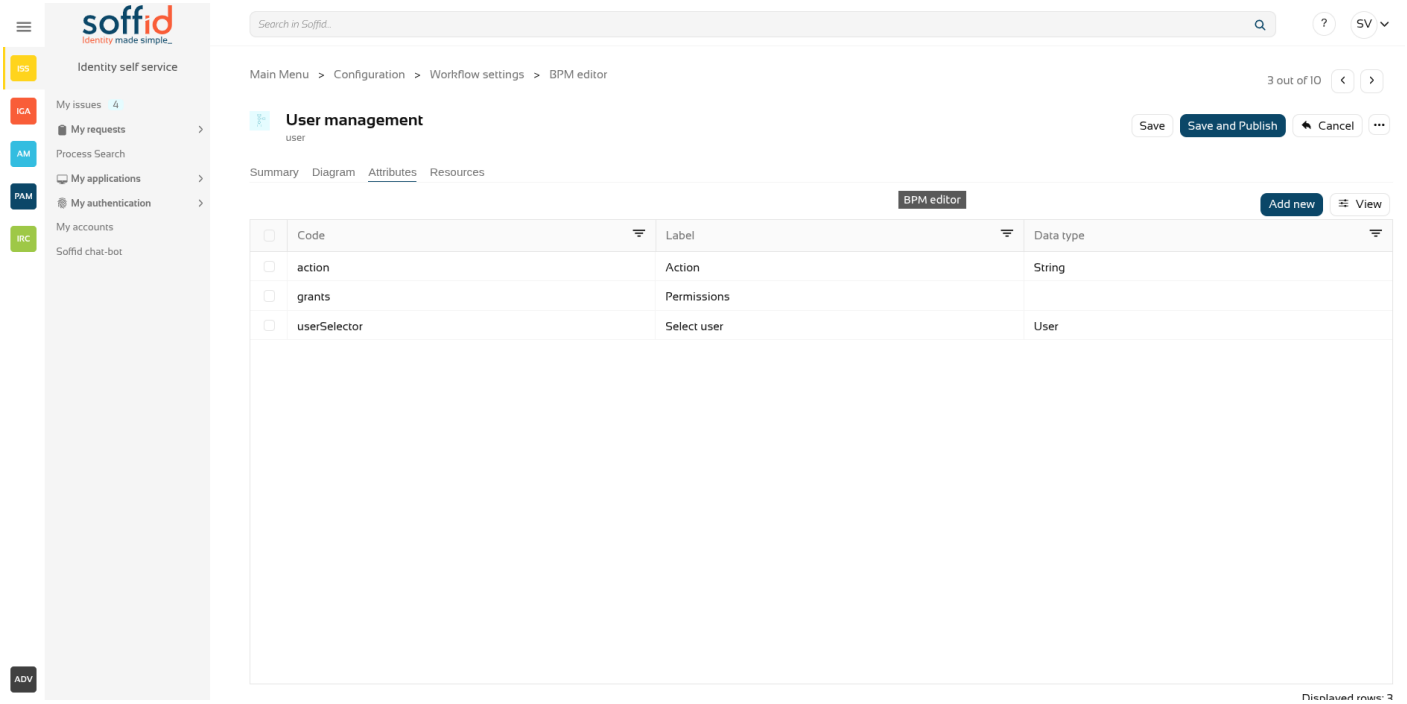
Attributes

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 User management type there are three attributes defined:

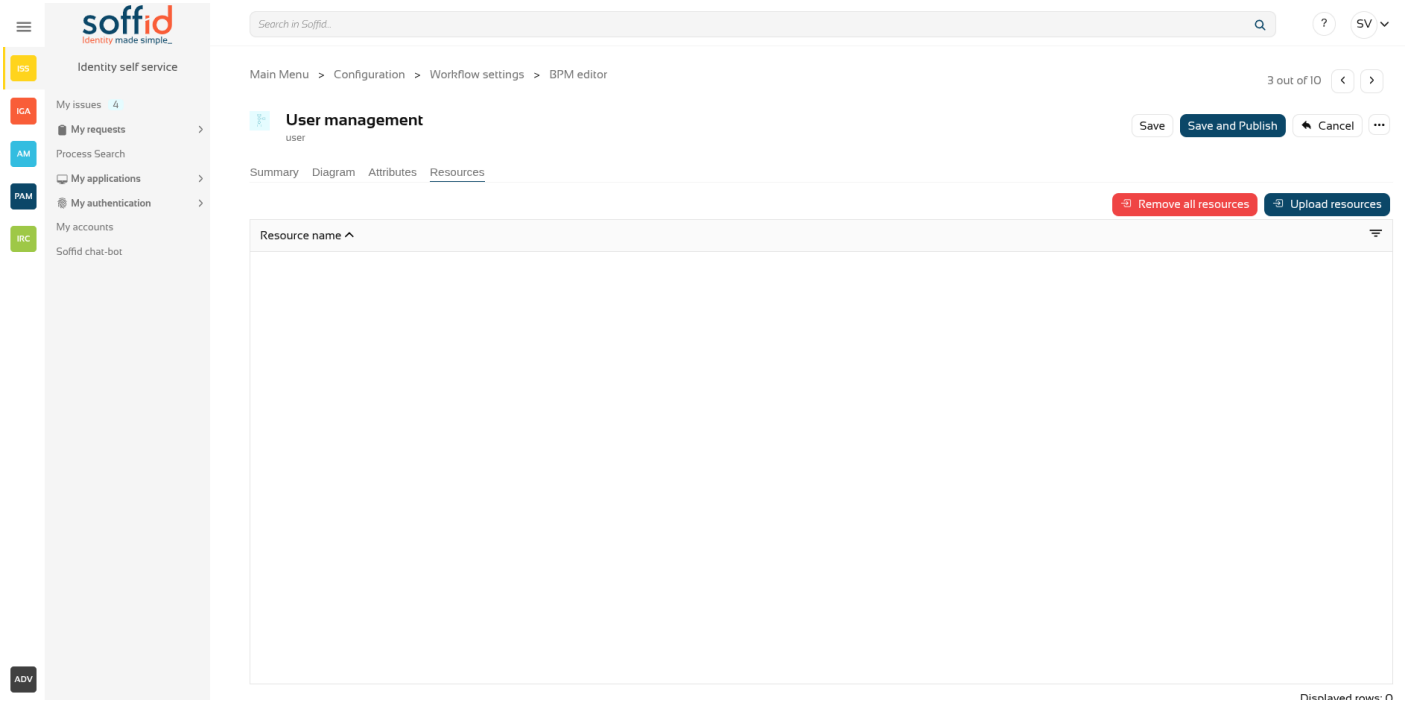
- **action**: by default, there are 4 operations defined, but you can customize these options, adding, removing and updating these:
  - Add user: this allows you to add a new identity to the systems.
  - Enable user: this allows you to enable an identity that is disabled.
  - Modify user: this allows you to modify the attributes for an existing identity.
  - Disable user: this allows you to disable an identity that is enabled.
- **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. You can add new attributes, and update or delete the default attributes. For each new attribute, you need to indicate, at least, the code, the label, and the data type.



Resources

If your workflow requires the use of extra libraries with their own classes and methods, you can upload a jar file so that Soffid can load it and it can be used from the scripts.



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
Export process	Allows you to export this workflow to a file in .partdef format. This file can be useful as a backup or for migration to another environment.

Attribute actions

Add new	Allows you to add a new attribute. When you click the button "Add new" Soffid will show the fields to fill in for the new attribute. It is mandatory to fill in the code and data type 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	Allows you to delete a defined attribute. First select one or more attributes and the click the "Delete" button. The attribute 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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