

# Self service portal

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# Introduction to Self Service Portal

## What is Self-Service Portal?

Soffid Console provides the Self-Service Portal, where the **end-users** can consult or change their credentials, request new permissions or access to applications, manage their profile, or launch applications. All from a single point of entry.

Another purpose of the Self-Service Portal is to reduce the workload of the **IT department**, as well as improve the overall security of the IT system.

Soffid allows administrator users to configure access to the different options depending on the end-users roles defined to use Soffid. In this way, end-users will be able to access the Self-Service Portal to manage their own requirements always depending on the defined business processes.

## Screen overview



My tasks



My requests



Process Search



My applications



My accounts

My authentication  
My OTP devices, My certificates an...

# Brief description of each option

## My tasks

My tasks display all the tasks in which the user is involved, like a supervisor, manager, or person who has to approve or deny that task.

For more information, [visit My Task page](#)

## My issues

My issues display all the issues that the user will be able to check, and the option allows the user to manage these issues.

For more information, [visit My Issues page](#)

# My request

My requests display all the processes or workflows that the user will be able to run, and the option allows the user to consult the status of the requests.

The Query request status displays all the processes that the user has initiated and allows the user to consult all the information about the workflow.

For more information, [visit My Request page](#)

# Process Search

That functionality allows to users search for processes initiated or requested by themselves. Here the users will be able to consult all the information related to the processes and their status and if there are any pending tasks to be completed. If there are pending tasks, the user will be able to browse the task and manage it.

Administrator users will be able to consult all the information about all the processes which have been executed by any user.

For more information, [visit the Process search page](#)

# My Applications

My applications display all the **corporate applications** and **third-party applications** as well to which the user has permission to connect. Those applications have to be configured into Soffid Console

The **password vault folder** will be displayed as well. In this folder, the users will be able to find the shared accounts on the Soffid vault folder and will be able to save their personal accounts.

For more information, [visit My Applications page](#)

# My Accounts

My Accounts display all the personal user accounts registered into Soffid Console and with which the user will log into the target system.

[Visit My Accounts page](#)

# My authentication

## My OTP devices

My OTP devices display all the OTP devices configured by the user and allow to the user config new ones.

For more information, [visit My OTP devices page](#)

## My certificates and FIDO tokens

My certificates and FIDO token display all the configured certificates and allow to the user config new ones.

For more information, [visit My certificates and FIDO tokens page](#)

# My Profile

My Profile allows to end-users config their own profile, update the user info and preferences, change the password, and recovery questions.

For more information, [visit My Profile page](#)

# My tasks

## Description

Displays the task in which the user is involved like a supervisor, manager, or person who has to approve or deny that task.

My task provides information about the process, the task, the start and due date and the assigned user. By clicking a record, it will be shown the task details and to perform actions will be allowed.

Manual tasks are assigned to named users, groups or roles. Whatever strategy is followed, each one of the assigned users will see that task at their tasks page.

You can differentiate tasks by their highlighted style:

- **Normal**: started task
- **Highlighted Blue**: due task
- **Highlighted Bold**: new task

The purpose of My tasks as a part of **Self Service Portal** is to reduce the workload of IT department, as well as improve overall security of IT system. Soffid console is concerned about task delegation and workflow management.

## Screen overview

<https://www.youtube.com/embed/HyNx0ehHGXY?rel=0>

## Custom attributes

### My Task List

- **Process ID**: unique process identifier in the system.

- **Process:** generic process name.
- **Task:** generic task name.
- **Start Date:** date and time when the process was started.
- **Due Date:** date and time when the process will finish.
- **Assigned:** user to whom the task is assigned

## Task detail

### Task

Shows information about the job done in this task. This information depends on the process launched.

### Action Logs

The action logs tab shows basic information about the process and a list with the summary of all the successive phases through which the task has passed.

- **Start date:** date and time the task starts
- **Last task date:** date of last task update.
- **End date:** date and time the process ends.
- **Status:** shows the point of the task (pending, on going or End/Completed)
- **Approve pending permissions:** Summary of all the successive phases through which the task has passed, providing information on the start date and time of the phase, the user assigned, and the action that was done.

## Attachments

Displays the documents attached to the task, in some cases, files are attached to the tasks.

Allows you to download those documents and to verify any digital signature attached to them. Some tasks even allow the user to upload documents.

### Comments

Displays the comments list added during the business process execution. Displays the comments list added during the task execution providing information about the user who wrote the comment, the date and time of that writing, and the comment that was written.

# Actions

## My task query actions

<b>Reload</b>	This action reload the task list with the current data.
<b>Download CSV File</b>	This action allows you to download a csv file with the list of all tasks. You can open the hamburger icon and Download CSV File.
<b>Open task</b>	By clicking on a record, the task detail will be shown.

## My task detail actions

<b>Close</b>	Allows you to closes the task window, you can add new comments and those will be saved.
<b>Take ownership</b>	Enables the user to self-assign the task to authorize or deny it.
<b>Schedule</b>	Allows you to schedule the task execution.
<b>Delegate</b>	Allows you to to reassign the task to another user, who will must approve or deny it.
<b>Approve</b>	Allows you to authorize the task. When you authorize a task all defined operations for this task will be performed.
<b>Reject</b>	Allows you to deny the task. When you deny a task none defined operations for this task will be performed.

# My issues

## Description

Soffid provides a tool to manage all issues and allows you to perform the operations available for each type of task. The actions to be performed will depend on each kind of task.

## Screen overview

[Main Menu](#) > [My issues](#)



Issue type Any  Description Any  [Add criteria](#)

[Quick](#) [Basic](#) [Advanced](#)

<input type="checkbox"/>	Issue type	Description	Status	Created on
	Filter	Filter	Filter	Filter
<input type="checkbox"/>	login-not-recognized	Unknown user aaaaaaa trying to log in	New	26/7/2023 06:51
<input type="checkbox"/>	login-not-recognized	Unknown user bob trying to log in	New	26/7/2023 06:51
<input type="checkbox"/>	otp-failures	Too many OTP failures for user bob	New	25/7/2023 09:33
<input type="checkbox"/>	otp-failures	Too many OTP failures for user bob	New	25/7/2023 09:31
<input type="checkbox"/>	otp-failures	Too many OTP failures for user bob	Acknowledged	25/7/2023 09:30
<input type="checkbox"/>	otp-failures	Too many OTP failures for user bob	New	25/7/2023 07:48
<input type="checkbox"/>	pam-violation	PAM rule \${pamRule} violation by user admin on	New	26/7/2023 13:27
<input type="checkbox"/>	pam-violation	PAM rule \${pamRule} violation by user admin on	New	26/7/2023 13:18
<input type="checkbox"/>	risk-increase	Risk for user bob increased to H	New	26/7/2023 08:25
<input type="checkbox"/>	security-exception	Security exception Unable to execute AdditionalDataService.findCustomObjectTypeByName. Required roles: [customObjectType:query]	New	26/7/2023 07:36

Displayed rows: 25

## Standard attributes

- **Issue type:** issue list defined by Soffid.
- **Description:** a brief description of the issue.
- **Status:** possible task status. There are three available statuses:
  - **New**
  - Acknowledged
  - Solved
- **Created on:** date of creation

# Actions

## Issues query action

<b>Download CSV file</b>	Allows you to download a CSV file with the issue data.
<b>Add or remove columns</b>	Allows you to show and hide columns in the table. You can also set the order in which the columns will be displayed. The selected columns and order will be saved for the next time Soffid displays the page.

## Issue detail

<b>Close</b>	Allows you to quit without applying any changes.
<b>Acknowledge</b>	Allows you to check as Acknowledged
<b>Solve issue</b>	Allows you to mark as solved the issue.
<b>Send custom email</b>	Allows you to send a custom email to one recipient.
<b>Add Comments</b>	Allows you to add comments to the Action logs.

## account-created

 **Image**

Issue number : 11

Created on : 3/8/2023 14:38

Issue type : account-created

Description : Created account usu01@%@mysqlAgent in target system mysqlAgent

Times : 1

Status : New

System : mysqlAgent

Account : usu01@%@mysqlAgent usu01@%

Actor : SOFFID\_USER@soffid

Actions log : 2023-08-03 14:38:22 null Created

[✓ Acknowledge](#) [Send custom email](#) [Unlock account](#) [Lock affected accounts](#) [Disable user](#) [Add comment](#) [← Close](#)

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.

## Disable user

If you click this option, Soffid will disable the user.

## disconnected-system

### Image

Issue number : 1  
Created on : 8/8/2023, 2:17 PM  
Issue type : disconnected-system  
Description : System ActiveDirectory is offline  
Times : 1  
Status : New  
System : ActiveDirectory  
Actor : SOFFID\_ADMIN@soffid  
Actions log : 2023-08-08 14:17:07 iam-sync-35.soffidnet Created

[✓ Acknowledge](#)

[Send custom email](#)

[Add comment](#)

[← Close](#)

## discovered-host

### Image

Issue number : 171  
Created on : 9/29/2023 07:04  
Issue type : discovered-host  
Description : Discovered host \_gateway  
Times : 1  
Status : N  
Actor : SOFFID\_ADMIN@soffid  
Hosts : \_gateway Discovered host \_gateway  
Actions log : 2023-09-29 07:04:45 - Created

[✓ Acknowledge](#)

[Send custom email](#)

[Add comment](#)

[← Close](#)

## discovered-system

### Image

# duplicated-user

## Image

Issue number : 22  
Created on : 07/8/2023 11:13  
Issue type : duplicated-user  
Description : Duplicated user galileo ggalilei Gregor.Mendel  
Times : 1  
Status : New  
Actor : SOFFID\_ADMIN@soffid

Users :

User name	External id	Action
galileo		Unknown
ggalilei		Unknown
Gregor.Mendel		Unknown

Actions log : 2023-08-07 11:13:03 pgarcia Created

requester : pgarcia@soffid Patricia García

[Acknowledge](#) [Send custom email](#) [Merge users](#) [Add comment](#) [Close](#)

## Mege users

If you click this option, Soffid will allow you to merge the identities by selecting the data of each of them.

### Image

#### Merge identities

	Gregor.Mendel	ggalilei	galileo
Merge	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User name		ggalilei	galileo
First name		Galileo	galileo
Last Name		Galilei	galilei
Type		Internal user	External user
Primary group		scientist scientist	admingroup Enterprise Adm
Home server		Void host Void host	
Profile server		Void host Void host	
eMail			pgarcia@soffid.com
Mail server		Void host Void host	
Enabled		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Multi session		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Back](#) [Next](#)

# failed-job

## Image

Issue number : 12  
 Created on : 3/8/2023 14:43  
 Issue type : failed-job  
 Description : Failed job Run Test Acc script  
 Times : 2  
 Status : New  
 Exception : Unexpected error on ScriptRunnerService.runScript caused by Sourced file: inline evaluation of: ``// failed-job accList = serviceLocator.getAccountService().findAccountByJsonQue ... ``  
 jobName : Run Test Acc script  
 Actor : SOFFID\_ADMIN@soffid  
 Actions log : 2023-08-03 14:43:47 null Created

[✓ Acknowledge](#)
[Send custom email](#)
[Add comment](#)
[← Close](#)

## enabled-account-on-disabled-user

**Image**

Issue number : 169  
 Created on : 9/29/2023 06:41  
 Issue type : enabled-account-on-disabled-user  
 Description : The account stevie@soffid has been enabled for inactive user stevie  
 Times : 1  
 Status : N  
 Account : stevie@soffid Stevie Wonder  
 Actor : SOFFID\_ADMIN@soffid

Users :

⚙ User name	⚙ External id	⚙ Action
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>
stevie		Unknown

Displayed rows

Actions log : 2023-09-29 06:41:14 pgarcia Created

requester : pgarcia@soffid Patricia Garcia

[✓ Acknowledge](#)
[Send custom email](#)
[Unlock account](#)
[Lock affected accounts](#)
[Add comment](#)
[← Close](#)

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.

## global-failed-login

**Image**

Issue number : 10  
Created on : 3/8/2023 14:26  
Issue type : global-failed-login  
Description : Number of failed login ratio 1.0%  
Times : 1  
Status : New  
Percentage of failed logins : 1.0  
Actor : SOFFID\_ADMIN@soffid  
Actions log : 2023-08-03 14:26:36 anonymous Created

[✓ Acknowledge](#) [Send custom email](#) [Add comment](#) [← Close](#)

## integration-errors

 **Image**

Issue number : 3  
Created on : 3/8/2023 09:10  
Issue type : integration-errors  
Description : Error acting on system ActiveDirectory  
Times : 3  
Status : New  
System : ActiveDirectory  
Exception : Failed to connect to LDAP server soffid.pat with base domain dc=soffid,dc=pat : (soffid\administrator) caused by LDAPException: Unable to connect to server soffid.pat:389 (91) Connect Error  
Actor : SOFFID\_ADMIN@soffid  
Actions log : 2023-08-03 09:10:35 iam-sync-35.soffidnet Created  
2023-08-03 09:14:09 admin Add comment: test

[✓ Acknowledge](#) [Send custom email](#) [Add comment](#) [← Close](#)

## locked-account

 **Image**

Issue number : 25  
 Created on : 7/8/2023 12:46  
 Issue type : locked-account  
 Description : Account frank@soffid has been locked

Times : 1  
 Status : New  
 Account : frank@soffid Frank Sinatra  
 Actor : SOFFID\_ADMIN@soffid

Users :

⚙ User name	⚙ External id	⚙ Action
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>
frank		Unknown

Actions log : 2023-08-07 12:46:31 \$\$INTERNAL\$\$ Created

Displayed rows:

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## login-different-country

 **Image**

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Issue number : 167  
 Created on : 9/28/2023 11:08  
 Issue type : login-different-country  
 Description : Login from a different country \${country}

Times : 1  
 Status : N  
 Actor : SOFFID\_ADMIN@soffid  
 Hosts : 172.20.0.1\_1695899287831

Users :

⚙ User name	⚙ External id	⚙ Action
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>
pgarcia		Unknown

Actions log : 2023-09-28 11:08:07 anonymous Created

Displayed rows:

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## login-from-new-device

**Image**

Issue number : 7

Created on : 3/8/2023 10:40

Issue type : login-from-new-device

Description : User bobm login from a new device

Times : 1

Status : New

Actor : SOFFID\_ADMIN@soffid

Hosts : 172.20.0.1\_1691058967706 Autocreated on 8/3/23, 10:36:07 AM

Users :

⌵ User name	⌵ External id	⌵ Action
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>
bobm		Unknown

Displayed rows:

Actions log : 2023-08-03 10:40:27 anonymous Created

[✓ Acknowledge](#)
[Send custom email](#)
[Unlock account](#)
[Lock affected accounts](#)
[Disable user](#)
[Lock affected host](#)
[Unlock host](#)
[← Close](#)

[Add comment](#)

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## login-not-recognized

**Image**

Issue number : 4

Created on : 3/8/2023 09:24

Issue type : login-not-recognized

Description : Unknown user master\aaaaaa trying to log in

Times : 1

Status : New

Actor : SOFFID\_ADMIN@soffid

Users :

User name	External id	Action
Filter	Filter	Filter
master\aaaaaa		Unknown

Actions log : 2023-08-03 09:24:19 \$\$INTERNAL\$\$ Created

Displayed rows:

[✓ Acknowledge](#)
[Send custom email](#)
[Unlock account](#)
[Lock affected accounts](#)
[Disable user](#)
[Lock affected host](#)
[Unlock host](#)
[← Close](#)

[Add comment](#)

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## otp-failures

**Image**

Issue number : 9

Created on : 3/8/2023 14:26

Issue type : otp-failures

Description : Too many OTP failures for user bobm

Times : 1

Status : New

OTP device : Security number

Actor : SOFFID\_ADMIN@soffid

Users :

User name	External id	Action
Filter	Filter	Filter
bobm		Unknown

Actions log : 2023-08-03 14:26:35 anonymous Created

Displayed rows:

[✓ Acknowledge](#)
[Send custom email](#)
[Unlock account](#)
[Lock affected accounts](#)
[Disable user](#)
[Lock affected host](#)
[Unlock host](#)
[← Close](#)

[Add comment](#)

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## pam-violation

**Image**

Issue number : 19

Created on : 07/8/2023 07:04

Issue type : pam-violation

Description : PAM rule sudo violation by user pgarcia on

Times : 1

Status : New

com.soffid.iam.api.PamRu

Actor : SOFFID\_ADMIN@soffid

Users :

User name	External id	Action
Filter	Filter	Filter
pgarcia		Unknown

Displayed rows

Actions log : 2023-08-07 07:04:26 anonymous Created

✓ Acknowledge
Send custom email
Unlock account
Lock affected accounts
Disable user
Lock affected host
Unlock host

Close

Add comment

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## password-changed

**Image**

## permissions-granted

## Image

Issue number : 13  
Created on : 3/8/2023 15:03  
Issue type : permissions-granted  
Description : Granted permission APP\_TEST101@APP\_TEST101 to  
Times : 1  
Status : New  
System : mysqlAgent  
Role grant : APP\_TEST101 - APP\_TEST101  
Actor : SOFFID\_ADMIN@soffid  
Actions log : 2023-08-03 15:03:28 null Created

[Acknowledge](#) [Send custom email](#) [Unlock account](#) [Lock affected accounts](#) [Disable user](#) [Add comment](#) [Close](#)

### Unlock account

If you click this option, Soffil will unlock the account.

### Look affected accounts

If you click this option, Soffil will lock affected accounts.

### Disable user

If you click this option, Soffid will disable the user.

## risk-increase

## Image

Issue number : 63  
Created on : 2023/8/10 14:35  
Issue type : risk-increase  
Description : Risk for user freddie increased to H  
Times : 1  
Status : New  
Risk : High  
Role grant : Account Operators - Members can administer domain user and group accou  
Account : freddie@ActiveDirectory Freddie Mercury  
Actor : SOFFID\_ADMIN@soffid

User name	External id	Action
freddie		Unknown

Displayed rows:

Actions log : 2023-08-10 14:35:39 admin Created

requester : admin@soffid Soffid Administrator

[Acknowledge](#) [Send custom email](#) [Unlock account](#) [Lock affected accounts](#) [Disable user](#) [Add comment](#) [Close](#)

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.

## robot-login

**Image**

[Main Menu](#) > [Administration](#) > [Monitoring and reporting](#) > [Issues](#) < 2 / 2

Issue number : 161  
 Created on : 9/27/2023 09:39  
 Issue type : robot-login  
 Description : Robot login detected from null

Times : 8  
 Status : N  
 Actor : SOFFID\_ADMIN@soffid

Hosts :

User name	External id	Action
Filter	Filter	Filter
<zxc		Unknown

Displayed rows

Actions log : 2023-09-27 09:39:16 anonymous Created

✓ Acknowledge
Send custom email
Unlock account
Lock affected accounts
Disable user
Lock affected host
Unlock host
Add comment
↩ Close

<b>Unlock account</b>	If you click this option, Soffil will unlock the account.
<b>Look affected accounts</b>	If you click this option, Soffil will lock affected accounts.
<b>Disable user</b>	If you click this option, Soffid will disable the user.
<b>Lock affected host</b>	If you click this option, Soffid will lock the affected host.
<b>Unlock host</b>	If you click this option, Soffid will unlock the host.

## security-exception

**Image**

Issue number : 16

Created on : 4/8/2023 09:21

Issue type : security-exception

Description : Security exception The bean encountered a non-application exception; nested exception is:  
java.lang.SecurityException: Unable to execute IssueService.listManualActions. Required roles: [issue:query]

Times : 1

Status : New

Exception : The bean encountered a non-application exception; nested exception is:  
java.lang.SecurityException: Unable to execute IssueService.listManualActions. Required roles: [issue:query]

Actor : SOFFID\_ADMIN@soffid

Users :

△ ▾ User name	△ ▾ External id	△ ▾ Action
Filter	Filter	Filter
aretha		Unknown

Displayed rows:

Actions log : 2023-08-04 09:21:08 aretha Created

requester : aretha@soffid Aretha Franklin

[✓ Acknowledge](#)
[Send custom email](#)
[Disable user](#)
[Add comment](#)
[← Close](#)

<b>Disable user</b>	If you click this option, Soffid will disable the user.
---------------------	---

# My applications

## Description

My application is a part of a Soffid Self-service portal that allows end-users to start **corporate applications** and **third party applications**. Also, the end-user can view and use the **shared accounts** available for the user defined on the Password vault.

## Applications

That option shows to each user, all the Corporate and Third party Applications to which the user can connect and the applications with public access. These applications have to be configured on the Application Access Tree option by an administrator user.

For more information you can visit the [Application access tree page](#).

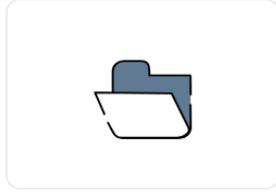
## Password Vault

My Applications option shows the **PasswordVault** folder. On the vault folder you can find two kind of folders, one a **personal folder** and other a **shared folder**.

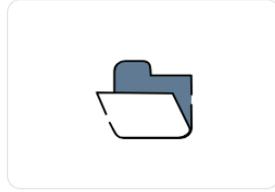
Inside the personal folder, you can create your own accounts, those accounts will not be shared with any other user. The shared folders could be used or managed by the owner/manager/SSO users.

For more information you can visit the [Password vault page](#).

## Screen overview



Corporate applications



vault

# My requests

## Description

Soffid provides a complete workflow engine that allows you to incorporate business processes or define new business processes as needed. End-users with the appropriate permissions will be able to request these processes. You can visit [Self service portal examples page](#) for more information.

My request screen allows to users: on the one hand, consult the processes they have executed and view the process details and status, [Query request status](#); on the other hand, they will be able to execute the processes for which they have been assigned the proper permissions.

More information about process and workflows on [BPM Editor Book](#)

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## Screen overview



Query request status



Permissions Request (N)



Update my data



User registration



User request

# Query request status

## Description

Displays a table with all the processes performed by the end-user. The end-user can consult processes detail and perform actions depending on the user permissions. You can visit [Self service portal examples page](#) for more information.

## Custom attributes

- **Process ID:** unique process identifier in the system.
- **Process Name:** generic process name
- **Status:** displays the point in progress on the defined process diagram. Depend on the process status, you could perform some operations or others.
- **Start date:** date and time the process starts
- **End date:** date and time the process ends. A process without end date it is a process in progress

To view all the attributes of one process, you can access [Process attributes](#) to consult the custom attributes. Be in mind, the processes have custom attributes depending on the business process definition.

# Actions

The operations to be performed depend on the user permission and the business processes defined with the workflow engine.

You can find documentation about the business processes on [BPM Editor Book](#).

## Query request status actions

<b>Reload</b>	Allows you to reload the processes list with updated data.
<b>Download CSV file</b>	Allows you to download a CSV file with all the information of the processes list.
<b>Query Filters</b>	Allows you to filter data in each column of the table.

## Process actions

The actions to perform to each process, depend on the business process definition and the user permissions.

You can find more information about the most commons process actions if you go to [Process detail actions](#)

# Process Search

## Description

A process is a series of actions, connected by transitions. An action could be either an automatic action or a manual task.

Soffid console is concerned about task delegation and workflow management. Any user is able to create new processes or any user can be assigned as an actor for a task belonging to a process.

Process Search page allows users to search process by different criteria, to view the process details and to perform the proper actions depending on the user roles.

In order to view a task, a security constraint must be accomplished. The user must have granted the observer or administrator role on the specific project version or has been assigned as a potential actor of it at some time.

## Screen overview

<https://www.youtube.com/embed/bXsMOMItL-g?rel=0>

## Custom attributes

### Search attributes

The search can be performed by setting certain parameters, which are as follows:

- **Search text:** search by a certain text, as user name or application, etc.
- **Process ID:** all the processes have an assigned an identifier ID.
- **Start date:** allows you to establish a date range when the process was started.

- **Include completed:** by default, tasks that have not yet been completed are displayed. By marking this flag, those who have concluded will also be shown. If you mark this flag, you could select a date range about the End date.
- **End date** of the process. These filters will be available if you check the Include completed option.

## Process attributes

Each process has common attributes and specific attributes depending on the business process definition.

You can find documentation about the business processes on [BPM Editor Book](#)

## Commons process attributes

- **Process Id:** each process has a unique identifier.
- **Name:** shows process name and the version of the add-on you are using.

## Other process information

- **Specific process attributes:** these attributes depend on the process definition.
- **Work in progress:** details the specific point in which the process and associated tasks are. You can find information about the process ID, the job description for each one of them, the start date and time, and the current status. The users with the proper roles could view the task details, browse and perform actions by clicking on it.
- **Actions log:** summary of all the successive phases through which the process has passed, providing information on the start date and time of the phase, the user (task manager) assigned, and the action that was done. Also when it is defined, the diagram of the workflow is displayed.
- **Attachments:** in some cases, for example in massive user upload processes using a CSV file, files are attached to the process so that it can be executed. These files can be consulted, by downloading or opening them directly, from this page. Additionally, if needed, it is possible to see the certificates used by the process owner.
- **Comments:** displays the comments added by the user who initializes or performs actions on the process.

# Actions

## Process query actions

Actions to be performed on the process list:

<b>Search</b>	Allows you to query the processes with the indicated parameters.
<b>Download CSV file</b>	Allows you to download a CSV file with the list of processes. You can open the hamburger icon and Download CSV File.
<b>Table Filters</b>	Allows you to filter data in each column of the table.

## Process detail actions

Each process has a specific action defined on the business process definition.

You can find documentation about the business processes on [BPM Editor Book](#)

The most commons actions are below:

<b>Close</b>	Allows you to close the process detail page and return to the previous page.
<b>Reload</b>	Allows you to reload all process data with the updated data.
<b>Take ownership</b>	Allows you to take the ownership to approve o deny the process.
<b>Approve</b>	Allows you to approve the process and perform the actions defined for that process.
<b>Deny</b>	Allows you to reject the process.

## Work in progress actions

<b>Edit task</b>	Allows you to edit a task by clicking on the record. When you click the task, you will browse to the task detail and it will be allowed to perform actions defined to users with the proper permissions.
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## Attachments

<b>Download</b>	Allows you to download the available attached files.
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# My accounts

## Description

My Account is a part of Soffid's self-service portal that allows end-users to access and manage their personal accounts. That option displays to each user, all their personal accounts and allows to set and query the password of each account.

## Screen overview

System	System description	Name	Actions
Filter	Filter	Filter	
IdP	Soffid Identity Provider	admin	<a href="#">Set password</a> <a href="#">Query password</a>
oracle	oracle	admin	<a href="#">Set password</a> <a href="#">Query password</a>
soffid	Soffid system	admin	<a href="#">Set password</a> <a href="#">Query password</a>
SQLServer	SQLServer	admin	<a href="#">Set password</a> <a href="#">Query password</a>
BABELTEST	BABELTEST	admin	<a href="#">Set password</a> <a href="#">Query password</a>
AD soffid.pat	Discovered host WIN-6O4SNJ52GPC	admin	<a href="#">Set password</a> <a href="#">Query password</a>

Displayed rows: 6

## Standard user attributes

- **System:** target sistem for which this account has been created
- **System description:** a brief description of the system.
- **Name:** user account name.
- **Actions:** available actions.

## Actions

<b>Set password</b>	Allows you to set a new password for this account. That change will apply to different target systems. The new password must comply with the password policies defined.
<b>Query password</b>	Allows you to query and copy the password and the user name.
<b>Download CSV file</b>	Allows you to download a CSV file with all the information about your accounts.

# My OTP devices

## Description

My OTP devices are part of a Soffid Self-service portal that allows end-users to access their OTP devices configured.

That option display to each user, all their OTP devices and also allows you to manage those and add new OTP devices.

Soffid Administrator user can configure the available OTP types. For more information, you can visit [the OTP settings page](#).

This option will only be available if the OTP addon is installed in the Soffid console. Visit the [Two factor authentication book](#) for more information

## Screen overview

<https://www.youtube.com/embed/faw-C7dwYYc?rel=0>

## Standard attributes

- **Name:** automatic name assigned to the OTP device
- **Created:** created date and time.
- **Last use:** last used date and time.
- **Status**
  - Created
  - Enabled
  - Locked
  - Disabled

# Actions

<b>Add</b>	Allows you to add a new OTP device. To add new OTP devices you need to click the add button (+), then Soffid will display a new wizard to config the OTP devices. First of all, you need to select the OTP device Type, once the type is selected, you need to fill in the required fields, which depend on the Type selected. If you select an Event-based or Time-based HMAC Token, you will need to scan the QR code and write the PIN. Finally, you must Apply changes.
<b>Delete</b>	Allows you to delete one or more OTP devices. To delete OTP devices first select the devices, then click on the subtract button (-), then Soffid will ask you to confirm or cancel the operation.

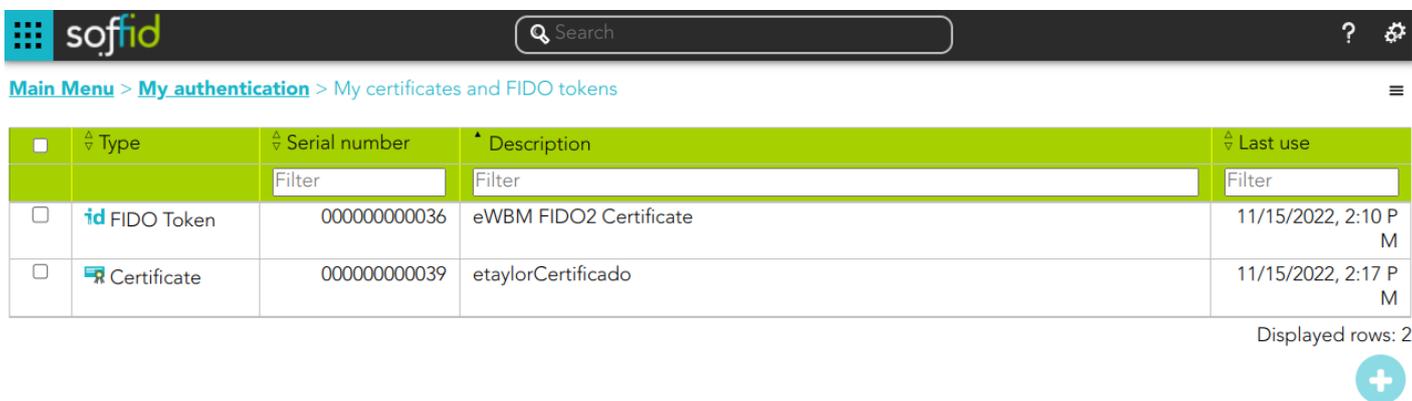
# My certificates and FIDO tokens

## Description

My certificates and FIDO tokens are part of a Soffid Self-service portal that allows end-users to access their OTP devices configured.

That option displays to each user, all their certificates and FIDO tokens and allows also to manage those and add new certificates and FIDO tokens.

## Screen overview



The screenshot shows the Soffid Self-service portal interface. At the top, there is a search bar and a navigation menu. The main content area displays a table with the following columns: Type, Serial number, Description, and Last use. The table contains two rows of data. Below the table, it indicates 'Displayed rows: 2' and a plus sign icon for adding new items.

<input type="checkbox"/>	Type	Serial number	Description	Last use
<input type="checkbox"/>	id FIDO Token	000000000036	eWBM FIDO2 Certificate	11/15/2022, 2:10 P M
<input type="checkbox"/>	Certificate	000000000039	etaylorCertificado	11/15/2022, 2:17 P M

Displayed rows: 2

## Standard attributes

- **Type:** there are two available options:
  - Certificate.
  - FIDO token.

- [Soffid Authenticator](#)

# Actions

<b>Add</b>	<p>Allows you to add new certificates and FIDO tokens. To add new ones you need to click the add button (+), and then Soffid will display a new wizard to configure the certificates and FIDO tokens.</p> <p>First of all, you need to select the Type, once the type is selected, you need to follow the required steps which depend on the Type selected.</p>
<b>Delete</b>	<p>Allows you to delete one or more certificates and FIDO tokens. To delete certificates or FIDO tokens first you must select the certificate or FIDO token, then click on the subtract button (-), then Soffid will ask you to confirm or cancel the operation.</p>

# My Profile

## Description

My Profile is a part of a Soffid Self-service portal that allows to end-users config their own profile, update the user info and preferences, change their password, and recover questions.

To display My Profile page you need to click on the config icon and then click My Profile on the options menu. Then Soffid displays a new window that will allow end users to configure their profiles.

## Screen overview

### Basic tab

**Basics** Authorizations Application consents

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**User Info:**

Last login:	12/13/21 13:37
Last IP connection:	172.20.0.1

If desired, you can change your password [Change Password](#) [Password recovery questions](#)

**Preferences:**

Language	English
Time zone	Greenwich Mean Time (GMT)
Date format	M/d/yy
Sample	12/13/21
Time format	HH:mm
Sample	13:37

[Apply changes](#)

### Change password

### New Password

Current password	Current password	
New password	New password	
New password	New password	
Password policy	The password will be valid for 365 days past change	

OK
Cancel

# Authorizations tab

**Permissions:**

These authorizations control the permissions each user.

If the listing does not appear in any domain value mean that you have permission to set authorization for all the domain.

If in the domain value appears a group code (lowercase), mean that you have the permission users who belong to this group (either as primary or secondary group).

Here you can view your authorizations:

Role	Authorization [domain value]	ITS Scope	Dom...
Filter	Filter	Filter	Filter
SOFFID_ADMIN	Query all access logs	Access logs	*
Account Operators	Query all access logs	Access logs	*
SOFFID_ADMIN	Change shared account password	Accounts	*
SOFFID_ADMIN	Create shared accounts	Accounts	*
SOFFID_ADMIN	Delete shared accounts	Accounts	*
SOFFID_ADMIN	Query shared accounts	Accounts	*
SOFFID ADMIN	Update shared accounts	Accounts	*

# Application consents tab

Application	Date	
Filter	Filter	
anonymous	4/14/21 16:25	—
http://soffid.bubu.lab:9090/soffid-iam-console	12/26/20 21:35	—
https://samltest.id/saml/sp	12/15/20 15:36	—

Displayed rows: 3

# Standard attributes

## Basic

### User Info

- **Last login:** date and time of the user's last login.
- **Last IP connection:** IP of the user's last login.
- **Change password:** allows end-users to change their password.
- **Password recovery questions:** allows end-users to config their own questions to recover their passwords.

For more info about password recovery, you can visit the [Password recovery questions page](#).

### Preferences

- **Language:** allows end-users to select their preferred language.
- **Time Zone:** allows end-users to select their time zone.
- **Date format:** allows end-users to select the format date.
- **Sample:** displays how the date will be displayed in Soffid Console
- **Time format:** allows end-users to select the format time
- **Sample:** displays how the time will be displayed in Soffid Console

## Authorizations

Display a list with the user authorizations.

- **Role**
- **Authorization [domain value]**
- **Scope**
- **Domain value**

## Application consents

Displays a list of all the user's consents given, and the user can see all of them. Users can remove the consent at any time as well.

When the user connects to a new application, the IdP will indicate which data will be shared with this application. That information is defined in the Attribute sharing policies page of the Federation.

For more info about password recovery, you can visit the [Attribute sharing policies page](#).