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# Roles

## Description

Soffid allows you to create roles to specify permissions that can be assigned to a user, a group, or an account. These permissions determine what operations are allowed on a resource. You can use roles to delegate access to users, applications, or services. The main goal is to achieve optimal security administration.

Roles can be defined at different levels:

- Organizational permissions.
- Application permissions.
- Low-level permissions.

When needed, generic roles can be created. When such a role is granted to any user, it is converted into a specific role by specifying an organization unit, information system, or a specific value. So, for instance, a generic emergency coordinator role can be created. The master emergency coordinator will have this role granted for the whole organization, while a remote office emergency coordinator will have this role granted for his single unit.

Note that a role can belong to an information system with a defined role definition process.

## Screen overview

Name :

babel:ADMIN \*

Description :

babel:ADMIN \*

System :

BABELTEST BABELTEST

Category :

Category

Information system name :

BABELTEST \* 🔍 BABELTEST

Domain :

No domain ▼

BPM enabled :

☒ Yes ☐ No

Approval start :

13/11/2024 08:43

Approval end :

[Preview changes](#)[↶ Undo](#)[📄 Apply changes](#)

## Related objects

1. [User](#)
2. [Groups](#)
3. [Information System](#)

## Standard attributes

### Role detail

- **Name:** name used to identify the role
- **Description:** detailed role description.
- **System:** information storage system from a technical point of view (active directory, database, CSV, ...).
- **Category**
- **Information system name:** asset or application, from a functional point of view, on which the permissions are granted or revoked.
- **Domain:** you can set a limitation of the role scope by selecting the domain. Initially, there are two domains defined, Groups and Information Systems. Soffid allows you to add more domains. (\*1) (\*2)

- **BPM enabled:** if you check this option (value selected is Yes) this role will be available in the Permissions management workflows.
- **Approval start:** at this date, Soffid will connect to the system and will assign the role. If there is no approval start, it will be assigned at the moment.
- **Approval end:** at this date, Soffid will connect to the system and will revoke the role.

### Domain example (\*1)

First, you can define the scope for one specific Role, for instance, you define role manager in Soffid System, with the scope Groups:

The screenshot shows the Soffid web interface for configuring a role. The breadcrumb trail is: Main Menu > Administration > Resources > Roles < 2 / 4 >. The 'Role details' tab is selected. The form contains the following fields:

- Name : Manager
- Description : Manager
- System : soffid (Soffid system)
- Category : Category
- Information system name : SOFFID (with a search icon and 'SOFFID Identity Manager' text)
- Domain : Groups (highlighted with a blue box)
- BPM enabled : ☒ (highlighted with a blue box)
- Approval start : (empty)
- Approval end : (empty)

Buttons at the bottom: Preview changes, Undo, and Apply changes.

Then, you can assign this role to one or more users. To do this you must indicate the scope (can be one or more scoped):

soffid

Main Menu > Administration > Resources > Users 1 / 2

Basics Groups Accounts Roles Effective Roles Shared accounts Sessions User processes Issues OTP devices Tokens

mcervantes - Miguel de Cervantes

**New role assignment**

Select role > **Optional scope** > Set membership properties > Finish

Select domain value

Writers

Singers

Select domain value

Back Set membership properties

Displayed rows: 1

So the user will have the role in the scopes indicated:

soffid

Main Menu > Administration > Resources > Users 2 / 2

Basics Groups Accounts Roles Effective Roles Shared accounts Sessions User processes Issues OTP devices Tokens

mcervantes - Miguel de Cervantes

	Risk	Role	System	Account	Information s...	Start date	End date	Domain ..
<input type="checkbox"/>		atlantida:create	ATLANTIDA	mcervantes	ATLANTIDA	28/11/2024		
<input type="checkbox"/>		atlantida:delete	ATLANTIDA	mcervantes	ATLANTIDA	28/11/2024		
<input type="checkbox"/>		Manager	soffid	mcervantes	SOFFID	28/11/2024		Writers
<input type="checkbox"/>		Manager	soffid	mcervantes	SOFFID	28/11/2024		Singers

Displayed rows: 4

If you try to assign the role without domain, this error will be displayed:

**New role assignment**

Information system

Role Name :

System :


Domain value:

Account name :

Start date :

End date :

**An error has occurred**

 A domain with name GRUPS or GRUPS\_USUARI must have a group code.

Technical data:

```
es.caib.seycon.ng.exception.SeyconException: A domain with name GRUF
at com.soffid.iam.model.RoleAccountEntityDaoImpl.rolsUsuarisToEntity
at com.soffid.iam.model.RoleAccountEntityDaoImpl.roleAccountToEntity
at com.soffid.iam.model.RoleAccountEntityDaoImpl.roleAccountToEntity
at com.soffid.iam.addon.admin.DaoMetricsInterceptor.invoke(DaoMetric
at com.soffid.iam.service.ApplicationServiceImpl.performCreateRolAcc
at com.soffid.iam.service.ApplicationServiceImpl.handleCreate(Applic
Throws exception es.caib.seycon.ng.exception.InternalErrorException:
```

Close

## Domain example (\*2)

You can define the scope for one specific Role, for instance, you define role manager in Soffid System, with the scope Information Systems:

**soffid** Search

Main Menu > Administration > Resources > Roles < 2 / 4 >

Role details Granted roles Grantee roles Grantee groups Users Role assignment rules

Name : Manager

Description : Manager

System : soffid Soffid system

Category : Category

Information system name : SOFFID SOFFID Identity Manager

Domain : Information systems

BPM enabled : ☒ Yes ☐ No

Approval start :

Approval end :

Preview changes

Undo Apply changes

Then, you can assign this role to one or more users. To do this you must indicate the scope (can be one or more scoped):

soffid

Search

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BasicsGroups

mcervantes - Miguel

Risk

▼ Role

Filter

atlant

atlant

New role assignment

Select role

Optional scope

Set membership properties

Finish

Select domain value

ATLANTIDA

BABELTEST

Select domain value

Back

Set membership properties

So the user will have the role in the scopes indicated:

soffid

Search

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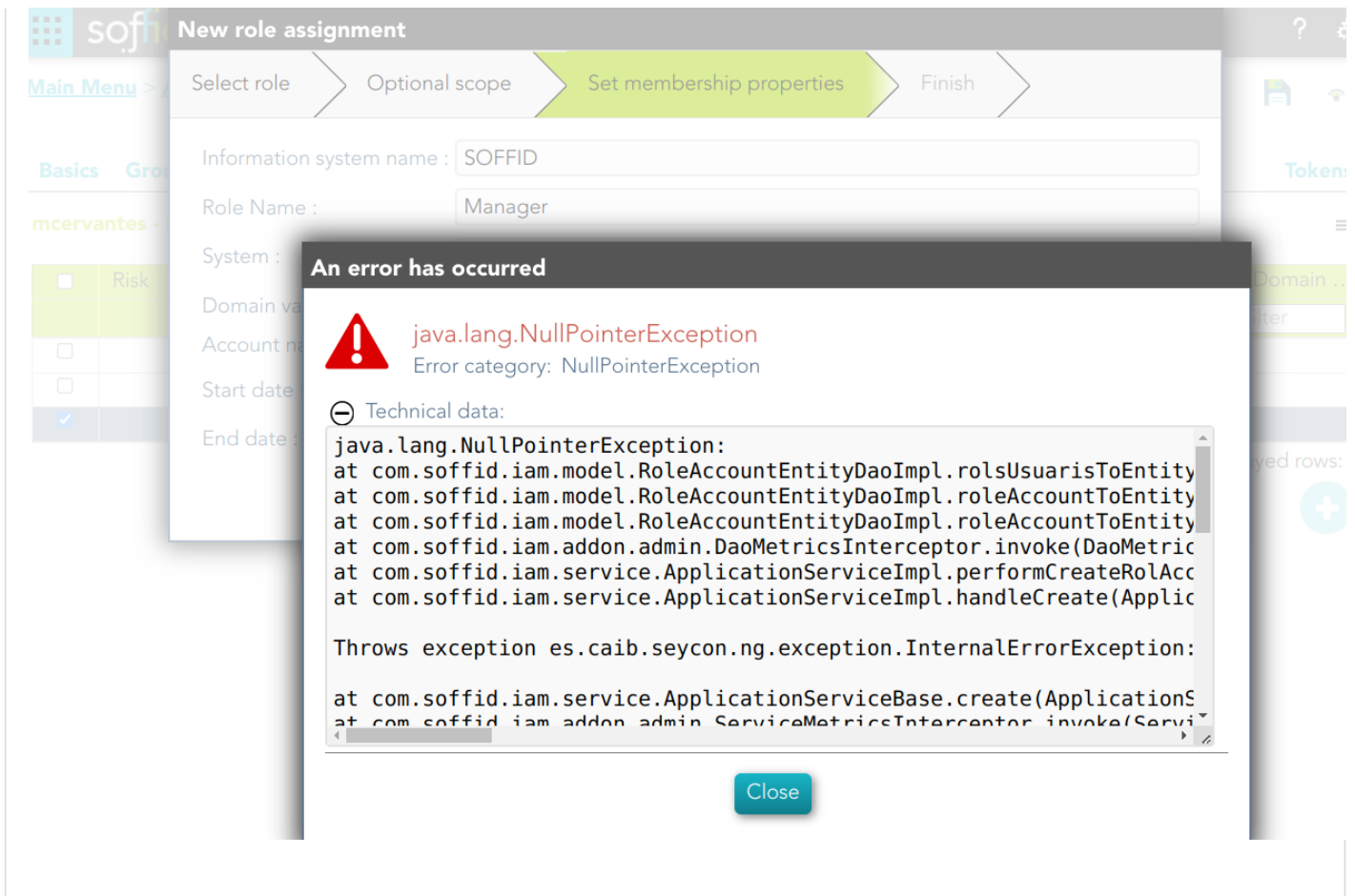
BasicsGroupsAccountsRolesEffective RolesShared accountsSessionsUser processesIssuesOTP devicesTokens

mcervantes - Miguel de Cervantes

	Risk	▼ Role	△ System	△ Account	△ Information s...	△ Start date	△ End date	△ Domain value
		Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>		atlantida:create	ATLANTIDA	mcervantes	ATLANTIDA	28/11/2024		
<input type="checkbox"/>		atlantida:delete	ATLANTIDA	mcervantes	ATLANTIDA	28/11/2024		
<input type="checkbox"/>		Manager	soffid	mcervantes	SOFFID	28/11/2024		BABELTEST
<input type="checkbox"/>		Manager	soffid	mcervantes	SOFFID	28/11/2024		ATLANTIDA

Displayed rows:

If you try to assign the role without domain, this error will be displayed:



## Granted roles

On the granted roles tab, you can assign the privileges of this role to another role in another system.

### Assign privileges

To assign privileges you should click the button with the add (+) symbol, then select the target role, the domain values when necessary, and click the finish button. At this point the record will be added to the list.

Now you can check or uncheck the mandatory field.

- **Mandatory:** the roles with this flag checked will be displayed in the user's effective roles tab.
- **No Mandatory:** roles with this flag unchecked will be displayed in the user's roles tab and can be managed. It is not automatically assigned to users who already had the parent role.

And finally, you should click the Apply changes button to save the changes. With this operation, all the permissions of this will be assigned to the target role.

## Image



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atlantida:app\_owner - atlantida:app\_owner

<input type="checkbox"/>	▼ Role	⚙ Database	⚙ Domain		⚙ Role	⚙ Database	⚙ Domain	M...
	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>		<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	
<input type="checkbox"/>	atlantida:app_owner	ATLANTIDA		→	atlantida:create	ATLANTIDA		<input type="checkbox"/>
<input type="checkbox"/>	atlantida:app_owner	ATLANTIDA		→	atlantida:read	ATLANTIDA		<input checked="" type="checkbox"/>

Displayed rows:

Preview changes

← Undo

Apply changes →

## Image

This role belong to an Information System with a defined Role definition process.

1. This assignation is pending to approve
2. This deletion is pending to approve



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babel:ADMIN - babel:ADMIN

<input type="checkbox"/>	▼ Role	⚙ Database	⚙ Domain		⚙ Role	⚙ Database	⚙ Domain	M...
	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>		<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	
<input checked="" type="checkbox"/> 1	babel:ADMIN	BABELTEST		→	atlantida:delete	ATLANTIDA		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 2	babel:ADMIN	BABELTEST		→	atlantida:read	ATLANTIDA		<input checked="" type="checkbox"/>
<input type="checkbox"/>	babel:ADMIN	BABELTEST		→	atlantida:app_owner	ATLANTIDA		<input checked="" type="checkbox"/>

Displayed rows:

Preview changes

← Undo

Apply changes →



# Revoke permissions

If you want to revoke permissions, you must select one or more records from the list and click the button with the subtraction symbol (-) and then click the Apply changes button to save the changes.

Image

sofid

Search

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⚙

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Role details

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babel:ADMIN - babel:ADMIN

≡

<input type="checkbox"/>	▼ Role	⚙ Database	⚙ Domain		⚙ Role	⚙ Database	⚙ Domain	M...
	Filter	Filter	Filter		Filter	Filter	Filter	
<input type="checkbox"/>	babel:ADMIN	BABELTEST		→	babel:read	BABELTEST		<input checked="" type="checkbox"/>
<input type="checkbox"/>	babel:ADMIN	BABELTEST		→	babel:delete	BABELTEST		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	babel:ADMIN	BABELTEST		→	babel:create	BABELTEST		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	babel:ADMIN	BABELTEST				BABELTEST		<input checked="" type="checkbox"/>

1

2

3

4

Please, confirm to delete 2 objects.

OKCancel

Displayed rows: 4

Preview changes

Undo


Apply changes

# Preview changes

In addition, you can check the preview changes, it display information about the action, the user or account, and the role or domain, and you can apply them.

Image





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**babel:ADMIN - babel:ADMIN**
≡

<input type="checkbox"/>	▲ Role	Database		▼ Role	Database	Domain	M...	▼ Informati..
	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>		<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>		<input type="text" value="Filter"/>
<input type="checkbox"/>	1 SOFFID_USER	soffid	→	babel:ADMIN	BABELTEST		<input checked="" type="checkbox"/>	SOFFID
<input type="checkbox"/>	2 SOFFID_GROUP_MGR	soffid	→	babel:ADMIN	BABELTEST		<input checked="" type="checkbox"/>	SOFFID
<input type="checkbox"/>	SOFFID_APP_OWNER	soffid	→	babel:ADMIN	BABELTEST		<input checked="" type="checkbox"/>	SOFFID

Displayed rows:
−
+

## Revoke permissions

If you want to revoke permissions, you must select one or more records from the list and click the button with the subtraction symbol (-) click the Apply changes button to save the changes.

## Preview changes

In addition, you can check the preview changes, it display information about the action, the user or account, and the role or domain, and you can apply them.

# Grantee groups

On the grantee groups tab, you can assign the privileges from a specific group to this role, or revoke the privileges.


## Assign privileges


To assign privileges you must click the button with the add symbol (+), then select the group, finish, and apply changes. Thus, the roles indicated, in the corresponding system, will be assigned to all users belonging to this group.

Now you can check or uncheck the mandatory field.

- **Mandatory:** the roles with this flag checked will be displayed in the user's effective roles tab.
- **No Mandatory:** roles with this flag unchecked will be displayed in the user's roles tab and can be managed. It is not automatically assigned to users who already had the parent role.

And finally, you should click the Apply changes button to save the changes. With this operation, all the permissions of this will be assigned to the target role.

 **Image**



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**babel:ADMIN - babel:ADMIN**

<input type="checkbox"/>	▼ Role		⬆ Role	⬆ Database	⬆ Domain	M...
	<input type="text" value="Filter"/>		<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	
<input type="checkbox"/>	babel_adm	→	babel:ADMIN	BABELTEST		<input checked="" type="checkbox"/>

Displayed rows:

-

Preview changes

← Undo

📄 Apply changes

## Revoke permissions

If you want to revoke permissions, you must select one or more records from the list and click the button with the subtraction symbol (-) click the Apply changes button to save the changes

## Preview changes

In addition, you can check the preview changes, it display information about the action, the user or account, and the role or domain, and you can apply them.

# Users

On the users tab, you can assign or revoke roles. To **assign a role** you must click the button with the add symbol (+) and choose one or more users, fill the scope when it is mandatory, and set membership properties. Each role needs an account to be applied to, so, if a user has no account on a system and a role on that system is granted, a new account will be created on this system. In case a user has more than one account on a system, you should indicate which of the suitable accounts will be granted the role.

It is also possible to **revoke roles** to the user from the entitlement details or by selecting one or more records from the list and clicking the button with the subtraction symbol.

The users with the role assigned by rules will be displayed with different colors. Soffid does not allow to revoke roles, on that page, that were assigned by rules.

Additionally, you can **download a CSV file** with the basic users data.

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soffid

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babel:ADMIN - babel:ADMIN

	Account	Description	Start date	End date	Recertificat..
	Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>	1 aretha	aretha Franklin	12/11/2024		12/11/2024
<input type="checkbox"/>	epardo	Emilia Pardo Bazan	12/11/2024		12/11/2024
<input type="checkbox"/>	2 ggalilei	ggalilei 1 Galilei	12/11/2024		12/11/2024
<input type="checkbox"/>	3 mcervantes	Miguel de Cervantes	12/11/2024		12/11/2024
<input type="checkbox"/>	rcastro	Rosalia de Castro	12/11/2024		12/11/2024
<input type="checkbox"/>	sramonycajal	Santiago Ramon y Cajal	12/11/2024		12/11/2024
<input type="checkbox"/>	wwoolf	Virginia Woolf	12/11/2024		12/11/2024

Displayed rows:

Preview changes

Undo

Apply changes

1) This assignment is pending to approve

2) This deletion is pending to approve

3) This assignment is by an assignment rule

# Role assignment rules

You can consult the Role assignment rules related to this role.

Image

soffid

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Search

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▼ Name	▲ Description
Filter	Filter
BabelRule	BabelRule

Displayed rows:

Preview changes

← Undo

Apply changes

For more information, you can visit the [Role assignment rules page](#).

# Actions

## Roles query

Query	Allows you to query roles through different search systems, <u>Quick</u> , <u>Basic</u> and <u>Advanced</u> .
Add or remove columns	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 this page.
Add new	Allows you to add a new role in the system. You can choose that option on the hamburger menu or click the add button (+). To add a new role it will be mandatory to fill in the required fields
Delete	Allows you to remove one or more roles by selecting one or more records and next clicking the button with the subtraction symbol (-). To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation.

<b>Import</b>	<p>Allows you to upload a CSV file with the role list to add or update roles to Soffid.</p> <p>First, you need to pick up a CSV file, that CSV has to contain a specific configuration. Then you need to check the content to be loaded, it is allowed to choose if you want or not to load a specific attribute. And finally, you need to select the mappings for each column of the CSV file to import the data correctly and to click the Import button.</p>
<b>Download CSV file</b>	Allows you to download a csv file with the basic roles data.
<b>Bulk actions</b>	<p>Allows massive operations to be performed on all system roles. With that operation, updates can be made to any of the role's parameters. First of all, you must select the records that you want to update, once you have selected them, you must choose the bulk action on the hamburger icon. For more information visit the <a href="#">Bulk action page</a>.</p>

## Roles detail

<b>Delete</b>	<p>Allows you to delete a role. You can choose that option on the hamburger icon.</p> <p>To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation.</p>
<b>Preview changes</b>	Shows the pending changes on users or accounts. Soffid displays the information about the user or accounts, the action and de Role. You can choose if you want to apply the changes, or close the previer changes window.
<b>Apply changes</b>	Allows you to apply the pending changes.
<b>Undo</b>	Allows you to quit without applying any changes.

## Granted roles

<b>Apply changes</b>	Allows you to update the data changes.
<b>Add</b>	<p>Allows you to add a new granted role. To add a granted role, first you need to click the add button (+). Second, you need to write or search for a role. Once you have selected the role, if it is necessary, the next step will be to set the scope. Then, you need to finish the process. And finally, you need to apply changes.</p>
<b>Delete</b>	<p>Allows you to delete one or more granted roles.</p> <p>To delete you need to select the records and then click the button with the subtraction symbol (-).</p> <p>To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation.</p> <p>And finally, you need to apply changes.</p>

<b>Preview changes</b>	Shows the pending changes on users or accounts. Soffid displays the information about the user or accounts, the action and de Role. You can choose if you want to apply the changes, or close the previer changes window.
<b>Apply changes</b>	Allows you to apply the pending changes.
<b>Undo</b>	Allows you to quit without applying any changes.

## Grantee roles

<b>Add</b>	Allows you to add a new grantee role. To add a grantee role, first you need to click the add button (+). Second, you need to write or search for a role. Once you have selected the role, if it is necessary, the next step will be to set the source scope and the scope. Then, you need to finish the process. And finally, you need to apply changes.
<b>Delete</b>	Allows you to delete one or more grantee roles. To delete you need to select the records and then click the button with the subtraction symbol (-). To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation. And finally, you need to apply changes.
<b>Preview changes</b>	Shows the pending changes on users or accounts. Soffid displays the information about the user or accounts, the action and de Role. You can choose if you want to apply the changes, or close the previer changes window.
<b>Apply changes</b>	Allows you to apply the pending changes.
<b>Undo</b>	Allows you to quit without applying any changes.

## Grantee groups

<b>Add</b>	Allows you to add a new grantee group. To add a grantee group, first you need to click the add button (+). Second, you need to write or search for a group. Once you have selected the group, if it is necessary, the next step will be to set the scope. Then, you need to finish the process. And finally, you need to apply changes.
<b>Delete</b>	Allows you to delete one or more grantee groups. To delete you need to select the records and then click the button with the subtraction symbol (-). To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation. And finally, you need to apply changes.
<b>Preview changes</b>	Shows the pending changes on users or accounts. Soffid displays the information about the user or accounts, the action and de Role. You can choose if you want to apply the changes, or close the previer changes window.



<b>Apply changes</b>	Allows you to apply the pending changes.
<b>Undo</b>	Allows you to quit without applying any changes.

## Users

<b>Add or remove columns</b>	Allows you to show and hide columns in the table.
<b>Add</b>	Allows you to add users or accounts to assign the role. To add users or accounts, first of all, you need to click the add button (+) or the "Add new" action located on the hamburger icon. Second, you need to search the users and/or accounts and select the users and/or accounts you want to add. Once you have selected the users and/or accounts, if it is necessary, the next step will be to set the scope. Then you need to fill in the membership properties and finish the process. Finally, you need to apply changes.
<b>Delete</b>	<p>Allows you to delete one or more users and/or accounts, that is, Soffid will revoke the role.</p> <p>To delete one, you can select the record and click the button with the subtraction symbol (-) or the trash button located at the end of the row.</p> <p>To delete more at the same time, you need to select the records and then click the button with the subtraction symbol (-).</p> <p>To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation.</p> <p>And finally, you need to apply changes.</p>
<b>Download CSV file</b>	Allows you to download a CSV file with all the information about users.
<b>Import</b>	
<b>Preview changes</b>	Shows the pending changes on users or accounts. Soffid displays the information about the user or accounts, the action and the Role. You can choose if you want to apply the changes, or close the preview changes window.
<b>Apply changes</b>	Allows you to apply the pending changes.
<b>Undo</b>	Allows you to quit without applying any changes.