

# UI common actions

UI common actions

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# Search types

## Description

Throughout the Soffid you will be able to perform searches on the different objects that make up the application.

You will be able to search in the system by applying different ways of searching.

Main Menu > Resources > Users

The screenshot shows the search interface for 'Users'. At the top, there is a breadcrumb trail: 'Main Menu > Resources > Users'. Below this, there are three tabs: 'Quick', 'Basic', and 'Advanced'. The 'Quick' tab is highlighted with a red box. To the right of the tabs are several action buttons: 'Add new' (dark blue), 'Download CSV File' (light blue with a download icon), 'Import' (light blue with an import icon), and a three-dot menu icon. Below the tabs, there are four search criteria buttons: 'User name', 'First name', 'Last Name', and 'Primary group', each with a dropdown arrow. To the right of these criteria are two more buttons: 'Add criteria' and a search button with a magnifying glass icon. Finally, there is a 'View' button with a list icon.

## Quick

This option allows a quick search by fields that have been defined in the application metadata. You can find the metadata configuration on the [Metadata](#) page.

### Attribute metadata configuration

Attribute metadata

**Builtin user object**  
com.soffid.iam.base.api.User

Delete 2 out of 24

Expand all Collapse all

Attribute type :

Code \* : userName

Label : User name

Data type : String

User interface :

Letter case \* : Keep as entered by the user

User hint : User hint

Description : Description

Required :  Yes

**Include in quick search :  Yes**

You only have to type in the field provided for this purpose and press enter or click on the magnifying glass icon, then Soffid will display the list with the objects that complian the criteria typed.

You can include some characters as ",", "." and "/" as word separators in the search text. Check textual index page for more information.

## Examples

Quick Basic Advanced Add new Download CSV File Import ...

test  View

<input type="checkbox"/>	User name ^	Primary group v	Enabled f	Last Name f	First name f	Full name f
<input type="checkbox"/>	test	world	Yes	test	test	test test
<input type="checkbox"/>	testImport	world	Yes	Rotas Paz	Leo Angel	Leo Angel R...

Quick Basic Advanced Add new Download CSV File Import ...

te,t  View

<input type="checkbox"/>	User name ^	Primary group v	Enabled f	Last Name f	First name f	Full name f
<input type="checkbox"/>	aeinstein	franchises	Yes	Einstein	Albert	Albert Einstein
<input type="checkbox"/>	test	world	Yes	test	test	test test
<input type="checkbox"/>	testImport	world	Yes	Rotas Paz	Leo Angel	Leo Angel R...

## Basic

This is the default option. It provides some default search criteria and other criteria can be added from the add criteria option. These criteria will depend on the entity or object on which the search is being performed.

Remember, each criteria will be added to the previous ones. Each search criteria will have different search forms depending on the type of data in the particular field. For instance, a text field provides four different options to search, "Contains", "Start with", "Ends with" and "Equals", a date field provides the date "Since" and date "Until".

## Search criterias

Text

× User name | Contains "test" ▾ × First name ▾ × La

Filter by User name ×

Contains ▾ test

Clear Accept

Date

× User name | Contains "test" ▾ × First name ▾ × Last Name ▾

× Created on ▾ Add criteria 🔍

Filter by Created on ×

Since Until

📅 Since 📅 Until

⏪ < September 2025 > ⏩ ⏪ < September 2025 > ⏩

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

12 : 00

12 : 00

Clear Accept

Boolean

The image shows two screenshots of the Soffid interface. The top screenshot displays a user list with columns for 'User name', 'Primary group', and 'Enabled'. Filters include 'User name' (Contains 'test'), 'First name', 'Created on', 'Type', and 'Enabled'. A 'Filter by Enabled' dialog is open, allowing selection of 'Yes' or 'No' with 'Clear' and 'Accept' buttons. The bottom screenshot shows a system list with columns for 'Name', 'Description', 'System', and 'Type'. An 'Add criteria' button with a magnifying glass icon is present. A 'Filter by System' dialog is open, listing system types: ActiveDirectory, CustomApplication, Employee database, IdentityProvider, SSO, Soffid IDP, SoffidLDAP, soffid, test, and test2, with 'Clear' and 'Accept' buttons.

Soffid allows you to add criteria by clicking on the "Add criteria" button, then Soffid will display a list with all the criteria available and allows you to select to add a new one. To delete criteria you only have to click on the "Equis" icon (x) on the left side of the criteria, then automatically Soffid will remove the criteria and run the search without the removed criteria.

The criteria depend on the object list where you are working, so for instance the criteria are not the same for the user's list and the group's list.

**Example**

Quick Basic Advanced Add new Download CSV File Import ...

X User name | Contains "test" X First name X Last Name Add criteria View

<input type="checkbox"/>	User name ^	Primary group ^	Enabled ^	Last Name ^	First name ^	Full name ^
<input type="checkbox"/>	test	world	Yes	test	test	test test
<input type="checkbox"/>	testImport	world	Yes	Rotas Paz	Leo Angel	Leo Angel R...

If you want to clear a value of the criteria, select the criteria and click the "Clear" button.

**Clear button**

Quick Basic Advanced Add new

X User name X First name X Last Name X

X Email | Contains "a" Add criteria

Filter by Email X

Contains a

Clear Accept

## Advanced

This option allows an advanced search system using the SCIM query syntax. You can type the query to search the info using the SCIM standard.

You can access to SCIM Book for more information

### Examples

Quick Basic **Advanced**

Add new

Download CSV File

Import



userName co "n" AND active eq "true"



View

<input type="checkbox"/>	User name ^	Primary group v	Enabled	Last Name	First name	Full name
<input type="checkbox"/>	admin	admingroup	Yes	Administrator	Soffid	Soffid Admi...
<input type="checkbox"/>	aeinstein	franchises	Yes	Einstein	Albert	Albert Einstein
<input type="checkbox"/>	inewton	consultants	Yes	Newton	Isaac	Isaac Newton
<input type="checkbox"/>	ncopernico	headquarters	Yes	Copérnico	Nicolás	Nicolás Cop...

Quick Basic **Advanced**

Add new

Download CSV File

Import



not userName sw "n" AND not primaryGroup co "world"



View

<input type="checkbox"/>	User name ^	Primary group v	Enabled	Last Name	First name	Full name
<input type="checkbox"/>	admin	admingroup	Yes	Administrator	Soffid	Soffid Admi...
<input type="checkbox"/>	aeinstein	franchises	Yes	Einstein	Albert	Albert Einstein
<input type="checkbox"/>	ggalilei	suppliers	Yes	Galilei	Galileo	Galileo Galilei
<input type="checkbox"/>	inewton	consultants	Yes	Newton	Isaac	Isaac Newton

Quick

Basic

Advanced

Add new

Download CSV File

Import



emailAddress pr



View

<input type="checkbox"/>	User name ^	Primary group	Enabled ▾	Last Name ▾	First name ▾	Full name ▾	E-Mail ▾
<input type="checkbox"/>	ggalilei	suppliers	Yes	Galilei	Galileo	Galileo ...	ggalilei@...
<input type="checkbox"/>	inewton	consultants	Yes	Newton	Isaac	Isaac Ne...	inewton...
<input type="checkbox"/>	test	world	Yes	test	test	test test	test@sof...

# Column selector

## Description

Throughout the Soffid Console, we can find a large number of list-type components. These lists are used to display the corresponding objects data in each case, for instance users, accounts, etc.

The "**View**" component allows you to **add** or **remove** columns, but also allows you to **sort** by the name of the columns to display them in the list. Be in mind, the columns are the attributes of an object (an user, or an account...).

It is easy to use, once you click on the "View" button, Soffid will display a popup with the available columns for the object, then add, remove or drag and drop them in the order you want and click outside the popup, Soffid will refresh the list with the attributes with the changes that you defined.

Main Menu > Resources > Users

The screenshot shows a web interface for managing users. At the top, there is a breadcrumb trail: "Main Menu > Resources > Users". Below this, there are three tabs: "Quick", "Basic", and "Advanced". To the right of the tabs are several buttons: "Add new", "Download CSV File", "Import", and a three-dot menu. Below the tabs is a search bar and a "View" button. The main content is a table with columns: "User name", "Primary group", "Enabled", "Last Name", and "First Name". The table contains several rows of user data. A "View" popup is open, showing a list of columns that can be selected or deselected. The selected columns are: "User name", "Primary group", "Enabled", "Last Name", "First name", "Full name", and "EMail". The unselected columns are: "Middle name", "Type", and "Home server".

<input type="checkbox"/>	User name ^ v	Primary group	Enabled	Last Name	First Name
<input type="checkbox"/>	admin	admingroup	Yes	Administrator	Sc
<input type="checkbox"/>	aeinstein	franchises	Yes	Einstein	Alk
<input type="checkbox"/>	ggalilei	suppliers	Yes	Galilei	Ge
<input type="checkbox"/>	inewton	consultants	Yes	Newton	Isa
<input type="checkbox"/>	ncopernico	headquarters	Yes	Copérnico	Ni
<input type="checkbox"/>	test	world	Yes	test	tes
<input type="checkbox"/>	testImport	world	Yes	Rotas Paz	Le

- User name
- Primary group
- Enabled
- Last Name
- First name
- Full name
- EMail
- Middle name
- Type
- Home server

# Download CSV file & Import

## Description

On many pages of the Console, you may see the option "Download CSV file", and on a few pages, you may see the "import" button.

Main Menu > Resources > Users



## Download CSV file

Soffid allows you to download all data objects displayed in tables in a CSV file with the "**Download CSV file**".

If you require additional attributes, add them first using the "**View**" option.

This CSV file can be very useful for the "**Import**" option, as you can edit its values or add new rows.

## Import

Soffid allows you to upload a CSV file with the data list to **add**, **update** or **delete** information to the data table. The operations that can be performed with the data import depend on the table on which the process is being performed.

To "**Import**" data from a CSV file, first of all it will be to pick the file to import. Once the file has been selected, the data will be displayed to check contents. If the content is correct, then it is allowed to set up the mappings for each CSV file column, "Don't load" option is available. Finally it is allowed to perform the import process.

When the import process finishes, Soffid will show a message with the result of the process execution.

## Example

### Import

Pick a file

The file will be loaded into soffid database

Check contents

You can change the separators and encoding

Select mappings for each

You can select how to map e

Pick a file

Cancel

admin

admingroup

Yes

Administrator

Soffid

Soffid Admin

## Import

soffid database

**Check contents**  
You can change the separators and encoding

**Select mappings for each CSV file column**  
You can select how to map each column in the CSV file

Character set :

UTF-8

Separator :

,

Quote character :

"

Escape character :


\

Contains header row :

Yes

 Reload

User name	Primary group	Enabled	Last Name	First name	Full name	EMail
admin	admingroup	Yes	Administr...	Soffid	Soffid Ad...	
aeinstein	franchises	Yes	Einstein	Albert	Albert Ei...	
ggalilei	suppliers	Yes	Galilei	Galileo	Galileo G...	ggalilei@...
inewton	consultants	Yes	Newton	Isaac	Isaac Ne...	inewton...
ncopernico	headquar...	Yes	Copérmico	Nicolás	Nicolás C...	
test	world	Yes	test	test	test test	test@soff...
testImport	world	Yes	Rotas Paz	Leo Angel	Leo Ange...	

 Back

Next

# Import

soffid database

## Check contents

You can change the separators and encoding

## Select mappings for each CSV file column

You can select how to map each column in the CSV file

### Select mappings for each CSV file column

CSV column	Target object attribute
User name	User name ▼
Primary group	Primary group ▼
Enabled	Enabled ▼
Last Name	Last Name ▼
First name	First name ▼
Full name	Don't load ▼
E-Mail	E-Mail ▼

← Back

Import

Search in Soffid...



Main Menu > Resources > Users

Quick

Basic

Advanced

Add new

Download CSV File

Import

Notice



Added 0 new rows, 0 rows updated, 0 rows removed and 7 rows without any change

OK

<input type="checkbox"/>	User name ^v						E-Mail
<input type="checkbox"/>	admin						mi...
<input type="checkbox"/>	aeinstein						inst...
<input type="checkbox"/>	ggalilei						Gal... ggalilei@
<input type="checkbox"/>	inewton						ewton inewton
<input type="checkbox"/>	ncopernico	headquarters	Yes	Copérnico	Nicolás	Nicolás Co...	
<input type="checkbox"/>	test	world	Yes	test	test	test test	test@sc
<input type="checkbox"/>	testImport	world	Yes	Rotas Paz	Leo Angel	Leo Angel ...	

# Bulk actions

## Description

Allows massive operations to be performed on the selected records. With that operation, updates can be made to any of the object parameters.

You can access this option through the "three points" icon from a few of the Soffid pages, like users list or accounts list.

- 1.** First of all, you need to **select the records** that you want to update from the list, once you have selected them, you must choose the **bulk action** button on the **three points** icon.
- 2.** Then Soffid display a popup where you can select one by one the attributes that will be updated.

The first dropdown list displays the attributes of the object, for instance, the user attributes.

The second dropdown list displays the operation to be performed on the selected attribute. The operation can be **change the value** or **clear the value**, and if it is necessary the new value.

The type of the third field will depend on the attribute type selected previously.

**Image**

The image shows a user management interface with a table of users and a detailed edit form for a selected user.

**Table of Users:**

<input type="checkbox"/>	User name ^v	Primary group ^v	Enabled ^v	Last Name ^v	First name ^v	Full name ^v	E-Mail ^v
<input checked="" type="checkbox"/>	admin	admingroup	Yes	Administrator	Soffid	Soffid Admi...	
<input checked="" type="checkbox"/>	aeinstein	franchises	Yes	Einstein	Albert	Albert Einst...	
<input checked="" type="checkbox"/>	ggalilei	suppliers	Yes	Galilei	Galileo	Galileo Gal...	ggalilei@co...
<input checked="" type="checkbox"/>	inewton	consultants	Yes	Newton	Isaac	Isaac Newton	inewton@p...

**User Edit Form (Selected User: admin):**

- Country:** AT: Austria
- Enabled:**  No
- Middle name:** Dummy value

The interface includes a progress bar with steps: Select actions (highlighted), Confirm actions, and Finish. Navigation buttons for Back and Next are present.

**3.** Soffid shows a confirmation message with the number of records that will be updated. Finally, you can choose apply or come back. If you apply the changes, the attributes of the selected records will be updated

**Image**

Select actions

Confirm actions

Finish

Country

Change value

AT: Austria

Enabled

Change value

Enabled

No

Country

Clear values

Middle name

Change value

Middle name

Dummy value

4 change(s) are going to be applied to 4 objects

← Back

✓ Apply now



ncopernico

headquarters

Yes

Copérnico

Nicolás

Nicolás Co...