


# Automatic roles - adding roles by attribute value

If you want to add a role to all users that work on the 3th floor, you can use **Automatic roles by attribute**.




Basics of roles and automatic roles can be found in [documentation](#).


From CzechIdM 7.7 onwards, there is a new main menu item **Settings → automatic roles**.


 Automatic roles

Automatic roles from organizational structure

Automatic roles based on the attribute

 Add



<input type="checkbox"/>	Role	Tree node	Recursion type	Id
<input type="checkbox"/>	 ldap files	BCV Solutions s.r.o.	Without recursion	9666699


1 - 1 of 1 records

There are two tabs:

- **Automatic roles from organizational structure**
- **Automatic roles based on the attribute**

The first one shows the list of the automatic roles that a user gets via his/her placement in the organization's structure - say, all employees working in the IT Department.


The second one shows the automatic roles that users get by means of **Rules**.


 Automatic roles

Automatic roles from organizational structure

Automatic roles based on the attribute

+ Add






Filter 



Name of automatic role or role name

Cancel filter

Filter

<input type="checkbox"/>	Name 	Concept	Role	Id
<input type="checkbox"/>	 addfa	Concept	administrátor systému	57aa7e8
<input type="checkbox"/>	 Employees - 3th floor printing	Concept	ldap files	979b306
<input type="checkbox"/>	 Role for poul	Concept	ldap files	c18aea3
<input type="checkbox"/>	 test	Concept	aasdadsa	3824dd5


1 - 4 of 4 records

## Rules for automatic roles

Rules are conditions that are evaluated on users and their contracts. If all the rules/conditions are TRUE, then the user gets the given role.

e.g. A rule can be set such that a user's contract has an attribute "floor" with value "3".

To create a new automatic role by an attribute, go to **Settings → automatic roles → Automatic roles based on the attribute**. Next, click on the green "Add" button. In the form, fill in the name of a new automatic role by attribute e.g. "Employees - 3th floor printing".

 New automatic roles based on the attribute

Name

Employees - 3th floor printing

The name is used to easily identify the automatic role.

Role

ldap files

Rules

To add individual rules, you need to save the automatic role first.

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Save and continue

Then select the Role - real CzechIdM entity e.g. "ldap files" that will be assigned if the user matches the Rules.

The basic setup for the automatic role is done now, click Save and continue.

We have specified what role shall be assigned, now we need the conditions - Rules.

## 🔑 Employees - 3th floor printing Edit automatic roles based on the attribute

<b>Name</b>
Employees - 3th floor printing <span>✖</span>
<small>The name is used to easily identify the automatic role.</small>
<b>Role</b>
Idap files <span>▼</span>
<b>Rules</b>
<div><span>+ add</span> <span>Filter</span> <span>⌵</span> <span>⌵</span></div>

Click on the green "new" button above the Rule table - the table may be empty.

## 🔑 New rule

**Type of checked attribute**  
Extended attribute of contract ✖ ▼  
For this attribute type, the value of the rule will be checked

**Form attribute**  
Floor ✖ ▼

**Comparison type**  
Equals ✖ ▼

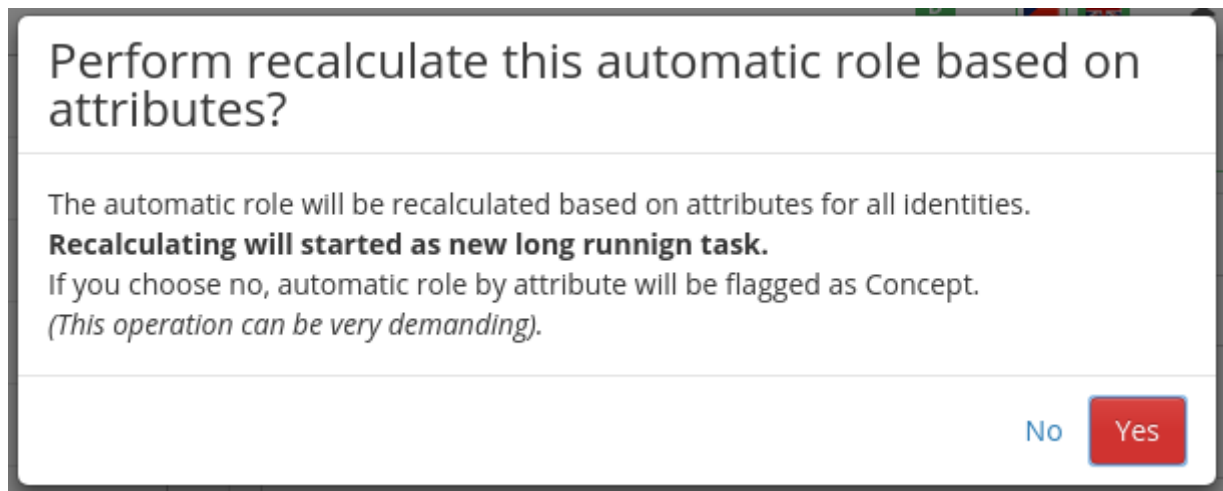
**Value**  
3 ✖ ★  
The value with which the value in the attribute will be compared.

[Back](#) Save and continue ▶

Provided that the users' contracts have EAV attribute "Floor" defined, the Rule can look like this:

- **Type of checked attribute = Extended attribute of contract**
- **Form attribute = Floor**
- **Comparison type = EQUALS**
- **Value = 3**


When you click on the "save and continue" button, you will be asked if the Automatic role should be applied now.



- **Yes** - Automatic role is evaluated for all users. Those matching the rule get the said role. Calculation is started as a long running task and its progress can be verified in the Settings → Task scheduler → All tasks.
  - Moreover, if an identity or its concept is saved - say after some manual editing done by the admin or during automatic synchronization -, the rules for automatic roles by attributes are recalculated for the respective user.
- **No** - automatic role is saved as a concept.

## Concepts of automatic roles

Automatic roles saved as concepts are not evaluated until the concepts are completed (Green button "Recalculate"). If any user is saved in gui or e.g. during synchronization, automatic roles concepts are skipped.



# Employees - 3th floor printing

 Edit automatic roles based on the attribute

Name

Employees - 3th floor printing

The name is used to easily identify the automatic role.

Role

Idap files

Automatic role is in an concept state (isn't recalculate to all users), you can return it to a consistent state by doing the recalculation.

Rules

+ Add

Filter

Name of attribute or value

Cancel filter

Filter

<input type="checkbox"/>	Type of checked attribute	Comparison type	Value	Id
<input type="checkbox"/>	<div><div></div>Extended attribute of contract</div>	<div>Equals</div>	3	bcf50be
1 - 1 of 1 records				


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Recalculation

From:  
<https://wiki.czechidm.com/> - IdStory Identity Manager

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[https://wiki.czechidm.com/tutorial/adm/automatic\\_roles\\_by\\_attribute?rev=1545923524](https://wiki.czechidm.com/tutorial/adm/automatic_roles_by_attribute?rev=1545923524)

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