

Module - Recertification

What do you need before you start

- You need to have **CzechIdM 9.7.0** (or higher) installed.
- You need to be logged in as **admin** (or an identity with superAdminRole).
- You need to enable the **Recertification** module.
- For hard recertification you will need plan new LRT - *RecertificationRemoveRolesTaskExecutor* (since module version 3.2.0)



Two new agendas were created under main menu **Roles→Recertification**:

- **Recertification requests** - contains created recertification requests.
- **Recertification** - contains created recertification actions. It contains requests grouped by recertification action executed by bulk actions.

Dashboard

Dashboard with recertification requests was created - it shows unresolved requests, which can be approved by a logged user with appropriate rights. The table of recertification request is the same as below - the default filter shows the currently logged user and only unresolved requests. The dashboard is hidden when no requests are found.

Role recertifications for approval

<div><div>Filter</div><div></div></div>							
<input type="checkbox"/>	State	Role recertification for	Due date	Created	Recertification type	Items	Id
<input type="checkbox"/>	 Created	 superAdminRole	31.08.2019	01.08.2019 13:23:44	Approve by role authorizer	1	ID:401e5c0 TI:0a06bcf
1 - 1 of 1 records							

Recertification requests

Request table:

Recertification

Recertification request

Date

State

Cancel filter

Filter

Username or role code (like)


Filter

<input type="checkbox"/>	State	Role recertification for	Due date	Created	Recertification type	Items	Id
<input type="checkbox"/>	<div><div>Created</div></div>	<div><div></div><div>John Doe, Director</div></div>	30.08.2019	31.07.2019 12:18:03	<div>Approve by identity contracted position</div>	20	ID:4eb1bde TI:0852f8c
<input type="checkbox"/>	<div><div>Executed</div><div></div></div>	<div><div></div><div>John Doe, Director</div></div>	30.08.2019	31.07.2019 12:17:28	<div>Approve by identity contracted position</div>	20	ID:fd1f82b TI:c896433
<input type="checkbox"/>	<div><div>Executed</div><div></div></div>	<div><div></div><div>Update3 (10 sdfUp), Two22 (two), next one</div></div>	30.08.2019	31.07.2019 09:51:41	<div>Approve by identity contracted position</div>	1	ID:70299f2 TI:27c07c1
<input type="checkbox"/>	<div><div>Executed</div><div></div></div>	<div><div></div><div>Jan Admin (admin, 4896578965), Root organization (root), aaa</div></div>	30.08.2019	31.07.2019 09:51:40	<div>Approve by identity contracted position</div>	2	ID:860c5c1 TI:27c07c1
<input type="checkbox"/>	<div><div>Blocked</div><div></div></div>	<div><div></div><div>table, d</div></div>	30.08.2019	31.07.2019 09:51:40	<div>Approve by identity contracted position</div>	1	ID:df1c97b TI:27c07c1
<input type="checkbox"/>	<div><div>Executed</div><div></div></div>	<div><div></div><div>manualBulkTwo, Default</div></div>	30.08.2019	31.07.2019 09:51:40	<div>Approve by identity contracted position</div>	1	ID:351dc8f TI:27c07c1
<input type="checkbox"/>	<div><div>Executed</div><div></div></div>	<div><div></div><div>Update3 (10 sdfUp), Two22 (two), next one</div></div>	30.08.2019	31.07.2019 09:09:57	<div>Approve by identity contracted position</div>	1	ID:d065f8c TI:abdfef84
<input type="checkbox"/>	<div><div>Executed</div><div></div></div>	<div><div></div><div>Jan Admin (admin, 4896578965), Root organization (root), aaa</div></div>	30.08.2019	31.07.2019 09:09:57	<div>Approve by identity contracted position</div>	2	ID:44b3fa9 TI:abdfef84
<input type="checkbox"/>	<div><div>Blocked</div><div></div></div>	<div><div></div><div>table, d</div></div>	30.08.2019	31.07.2019 09:09:57	<div>Approve by identity contracted position</div>	1	ID:b73ba0a TI:abdfef84
<input type="checkbox"/>	<div><div>Blocked</div><div></div></div>	<div><div></div><div>manualBulkTwo, Default</div></div>	30.08.2019	31.07.2019 09:09:57	<div>Approve by identity contracted position</div>	1	ID:660337e TI:abdfef84

1 - 10 of 10 records


On the recertification request detail there are following tabs:

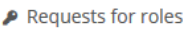
- with items - contains basic information about the request and items to approve.
- with approvers - shows current available approvers by recertification type (contract managers or role guarantee defined by user or role).
- with role requests - when assigned role represented by a recertification item is removed, the assigned role is removed by role request. You can see the state of this request.

 John Doe, Director

recertification request detail

○ Recertification items

 Approvers

 Requests for roles


Basic information

Recertification type

Approve by identity contracted position

Recertification will be approved (solved) by user guarantee (by contracted position).



Contracted position

 John Doe, Director


Recertification for user contracted position.

Due date

30.08.2019



User

 John Doe

Recertification for user.

Created














31.07.2019 12:18

Result

○ Running

Recertification items

Role	Valid from	Valid till	Actions	Id
  VPN access (10_vpn test) (2)				ID:c43ebce TI:0852f8c
  Tabulka (table production) (2)				ID:6120902 TI:4b8a42c
 tableTwo (production)				ID:7c96e45 TI:0852f8c
  Vpn 5 (vs) (1)				ID:ce48039 TI:0852f8c
 Vpn 6 (vs)				ID:151cb7f TI:0852f8c

1 - 5 of 5 records

Back

Approve

Recertification actions

Contains requests grouped by recertification action executed by bulk actions.







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

Recertification

Recertification

Recertification request

Filter

<input type="checkbox"/>	Recertification name	Due date	Created	Recertification type	Items	Id
<input type="checkbox"/>	 Role: superAdminRole (Due date: 31.08.2019)	31.08.2019	01.08.2019 12:16:33	<div>Approve by role authorizer</div>	1	ID:e10e7e6 TI:6692fe2
<input type="checkbox"/>	 Role: roleRecertificationSecurity (Due date: 31.08.2019)	31.08.2019	01.08.2019 12:14:13	<div>Approve by role authorizer</div>	1	ID:648c66a TI:07b021b
<input type="checkbox"/>	 Identity: John Doe (Due date: 30.08.2019)	30.08.2019	31.07.2019 12:18:03	<div>Approve by identity contracted position</div>	1	ID:4e07758 TI:0852f8c
<input type="checkbox"/>	 Identity: John Doe (Due date: 30.08.2019)	30.08.2019	31.07.2019 12:17:27	<div>Approve by identity contracted position</div>	1	ID:1d95147 TI:c896433
<input type="checkbox"/>	 Identity: 111ua, bbulk-130, bbulk-201, bbulk-73, bbulk-74, bbulk-76, bbulk-77, bbulk-800, bbulk-803, bbulk-806, bbulk-939, notificationOne, protectedOne, roleOne, rrrrrrr ... (Due date: 30.08.2019)	30.08.2019	31.07.2019 09:51:33	<div>Approve by identity contracted position</div>	4	ID:7571352 TI:27c07c1
<input type="checkbox"/>	 Identity: 111ua, bbulk-130, bbulk-201, bbulk-73, bbulk-74, bbulk-76, bbulk-77, bbulk-800, bbulk-803, bbulk-806, bbulk-939, notificationOne, protectedOne, roleOne, rrrrrrr (Due date: 30.08.2019)	30.08.2019	31.07.2019 09:09:49	<div>Approve by identity contracted position</div>	4	ID:29078b1 TI:abdfe84

1 - 6 of 6 records

Identity and role detail

Tab with recertified assigned roles was added to role and identity detail.

John Doe

User details

John Doe

Personal data

Example tab

More information

Password

Roles

Role recertification

Positions

Subordinates

Authorize roles

Accounts

Provisioning

Audit

Entity events

Directly assigned roles without automatic roles

Filter

Role	Contracted position	Valid from	Valid till	Recertification date	Id
tableTwo (production)	Director			01.08.2019	ID: c1f4436 TI: 2a58de2
Vpn 5 (vs) (1)	Director			01.08.2019	ID: 66135f4 TI: 2a58de2
Vpn 6 (vs)	Director			01.08.2019	ID: 18ccf39 TI: 2a58de2
VPN access (10_vpn test) (2)	Director			01.08.2019	ID: 8893f60 TI: 2a58de2
autoBulk-100	Director				ID: 387e2ea TI: 2a58de2
manual-bulk-61	Director				ID: b646661 TI: ..



READ permission for recertification items is needed. Transitive authorization evaluators (by recertification request and action) were prepared, see the security chapter.

Identity and role table

Bulk action for starting a recertification action is available on identity and role table.

Roles

Select folder

1 (1)

2

3

4

7

aaa (aaaa) (3)

aaaaaa (aaa) (1)

afghhj (a) (1)

dddd (dddd)

rsdaddfg (r)

x

y

Operation with (4) selected records:

Duplicate role

Recalculate accounts and provision

Recertify assigned roles

Remove

Environment

Environment

recertificationExecute recertificationExecute

recertificationRead recertificationRead

Bulk action modal window

Recertify assigned roles

Performing the bulk action [Recertify assigned roles] on 5 records: [Custom role (customRole), Delegation (delegationRole), garant, Helpdesk (helpdeskRole), @KU-HKRA/Skartacni_rizeni]

Recertify directly assigned currently valid identity roles for selected roles.

[7] assigned roles will be recertified.

Recertification type *

Approve by role authorizer

Recertification will be approved (realized) by identity guarantee or by role authorizer.

Due date *

26.07.2023

Due date for recertification approval.

☐ Hard recertification

After the due date , all roles that have not been recertified by the Due date for recertification will be removed.

CLOSE

EXECUTE

- Recertification action name will be filled automatically by selected roles or identities (if more than 15 records is selected, the name will be truncated to prevent long names).
- Recertification due date is required and prefilled by configuration.

Notification before recertification ends

Configurable task is standard long running task, configuration is set in task planner. Task search for recertifications with due date near end and send notification.

Configuration

- Number of days before recertification ends - ie. 5
- Script - script for overload recipient search. Without script (default behavior) LRT finds recertification approver. With custom search script different recipients can be found, input is `RecRecertificationDto`, output is `List<IdmIdentityDto>`.
- Notification topic - Topic for notification, default value is:
rec:recertificationDueDateWarning (notification with url), second one is **rec:recertificationDueDateWarningSubordinates** (information about recertification approvers etc.).
- Merge notification for one identity - information about all recertifications are sorted by identity (recipient), each identity get one notification with list of all recertifications where it is recipient.

With module, 2 standard script for search recipients are provided:

- `recFindIdentitiesWithHelpdeskRole` - find all active identities with role.
- `recFindRecertificationApproversManagers` - find recertification approvers and for every identity finds its manager.

Hard (force) recertification

For every recertification (since 3.2.0 module version) can be setup boolean flag "Hard recertification". Every recertification will be after the due date checked and all not processed recertification will be processed with new task (`RecertificationRemoveRolesTaskExecutor`) and **role will be removed**.



Long running task `RecertificationRemoveRolesTaskExecutor` isn't planned by default. For hard recertification is required to plan the task at least one per day.

For project that updates from older versions will be for all recertification setup the new hard recertification flag to false = hard recertification disabled.

Long running task `RecertificationRemoveRolesTaskExecutor` has only one configuration - days after. The parameter days after is for configuration how long after due date by recertification will be roles removed. By default is the parameter zero. This is equivalent to remove roles directly after due date.

Task details

Task type *

📅

RecertificationRemoveRolesTaskExecutor

Remove roles after recertification request was expired (due date).

Description

Instance *

idm-primary

Execute on server (instance identifier)

Task parameters

days after *

0

CLOSE

SAVE

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https://wiki.czechidm.com/tutorial/adm/module_recertification

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