



SSF Tools: Certification Closer User Guide

Document Revision History

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Introduction

Access reviews that are part of IdentityIQ certifications can transition through several phases, depending on how they are configured. They reach the End phase after all of the time periods for other configured phases (e.g. Active, Challenge, Revocation phases) are concluded, regardless of whether all of the approve/reject decisions have been made by the certifier. At this point, the certification campaign is technically over. However, if the certification was not configured for auto-closing and decisions have not been made on any items, the following will be true:

- The certifier will still have work items for the access review in their IdentityIQ inbox
- The overall certification (represented by a CertificationGroup object) will remain with a status of Active

This is often not the desired outcome, and customers sometimes need a way to close the certification off, removing the work items and setting the status of the overall certification to Complete. The Certification Closer task was built for this purpose.

Installation

The Certification Closer task ships with the SSD and is deployed by default as part of the build process. Deployment of the Task Definition used by the tool can be switched on or off with the “deployCertificationCloser” property in the build.properties file. Set this to “true” to enable deployment, or “false” to disable.

Components

The tool includes a TaskDefinition object:

- config/SSF_Tools/CertificationCloser/Source/TaskDefinition/TaskDefinition_CertificationCloser.xml

In addition, there is a Java class for the Task Executor. After compilation by the build process, the Java class can be found here:

- WEB-INF/classes/sailpoint/services/standard/task/CertificationCloser.class

How to Use the Certification Closer

To use the task, it is necessary to create an instance of it from the template TaskDefinition. To do this, go to **Setup -> Tasks** (or **Monitor -> Tasks** in versions of IdentityIQ earlier than 7.0). Click **New Task** and choose **Certification Closer**.

The screenshot below shows the task details:

New Task

Standard Properties

*Indicates a required field.

Name*	Close Certifications
Description	Close active certifications that have ended.
Allow Concurrency	<input type="checkbox"/>
Require Signoff	<input type="checkbox"/>
Host	
Number of Runs	0
Average Run Time	0:00:00

Previous Result Action

Delete

Reset Run Statistics

Email Task Alerts

Email Notification Disabled

Certification Closer Options

Select active certifications or leave blank for all.

- Account Group Membership Certification [9/14/17 4:08:27 PM BST]
- Account Group Permissions Certification [9/14/17 4:08:10 PM BST]
- Manager Certification [9/22/17 7:58:31 PM BST]
- Manager Certification [9/22/17 7:58:35 AM BST]
- Manager Certification [9/22/17 7:59:09 AM BST]
- Manager Certification [9/22/17 7:59:31 AM BST]
- Role Composition Certification [9/14/17 4:07:59 PM BST]
- Role Membership Certification [9/14/17 4:05:32 PM BST]

Save Save and Execute Cancel Refresh

The multi-select box in the **Certification Closer Options** section lists all the CertificationGroup objects that currently have a status of Active. Select any that you want to close, or select none in order to process all of them. CertificationGroups will only be processed by the task if they have access reviews that are in the End phase.

Save and execute the task. The task will set each certification to automatically close if all the access reviews are in the End phase. Any decisions that have not been made on items in the access reviews will be set to Approved, and a comment will be added to each one indicating that the Certification Closer task has closed the certification. Any decisions that were previously made to items in the access review will remain, along with any comments that were added.

The closing of the certification will not be completed until the Perform Maintenance task next runs. By default, it runs every five minutes, or you can manually run it at any time. When this has finished, the overall certification will have its status set to Complete and the work items will no longer be present in the IdentityIQ inbox of the certifiers.

The Perform Maintenance task can take a long time to run for multiple certifications where there are large numbers of certification items. If you have a lot of certifications to close, you may wish to process them in smaller batches to avoid tying up the Perform Maintenance task for too long.