

# Recertification

## Recertification

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# What is the Recertification process?

## What is the Recertification process?

Recertification is a business process consisting of a periodic assessment carried out internally by a company to verify that it continues to comply with the standards of a regulation, management system or its own internal processes, ensuring that its processes, knowledge, assets and data are kept up to date, with the highest possible quality and avoiding problems and information leaks.

Each company decides which assets require greater focus and therefore greater control. This control can come from implementing workflows to control which people can perform which actions, who has authorisation over which data, or simply who is responsible for each asset.

Recertification is a manual, guided, or automated process to ensure that all individuals have the appropriate responsibility for their assets, and that users of those assets also have the correct access to them.

In summary, recertification is a control and updating mechanism for maintaining valid permits and certifications, adapting to changing standards and ensuring the competence or necessity of the right granted.

# Introduction to the Recertification addon

## What is the Recertification addon?

The **Recertification addon** provides the functionality to review access rights to make sure the users have access only to what they need.

This Soffid's functionality increases security, mitigates access risk, reduces review times, reduce the cost and also becomes the process auditable and compliant.

Recertification allows you to take immediate action to correct inconsistent or unauthorized permissions to prevent unwarranted access. These changes will be applied **in real time with our provisioning** solution in the source systems.

## Concepts

Soffid uses three different concepts:

- 1. Recertification policies:** the first step is to define and configure the different recertification processes based on the type and scope of the recertification process and the users involved in it.
- 2. Recertification campaign:** once we have the policies, we can create recertification campaigns for each of them, identifying the groups and information systems in which to search for roles or accounts to recertify.
- 3. Recertification to do:** this is the list of pending recertification campaigns along with the internal tasks that still need to be completed.

# How to install Recertification addon in Soffid

## Installation

### Introduction

To use an addon in Soffid, you must download and install it in the Console. There are two ways to do this.

- 1.** The first option is to use the **Soffid 4 marketplace**. You can download and upload it directly from the [Licence and plugin](#) page.
- 2.** The second option is to download the file from the Soffid **download** page and then **upload** it to the Console.

### Soffid 4 marketplace

Soffid 4 allows you to install and update plugins through the new Addons marketplace feature.

To access the marketplace, you must have a valid token to use Soffid and have configured the Console via https. Please check the [License and plugin](#) page.

- 1.** Please **log in** to IAM Console.

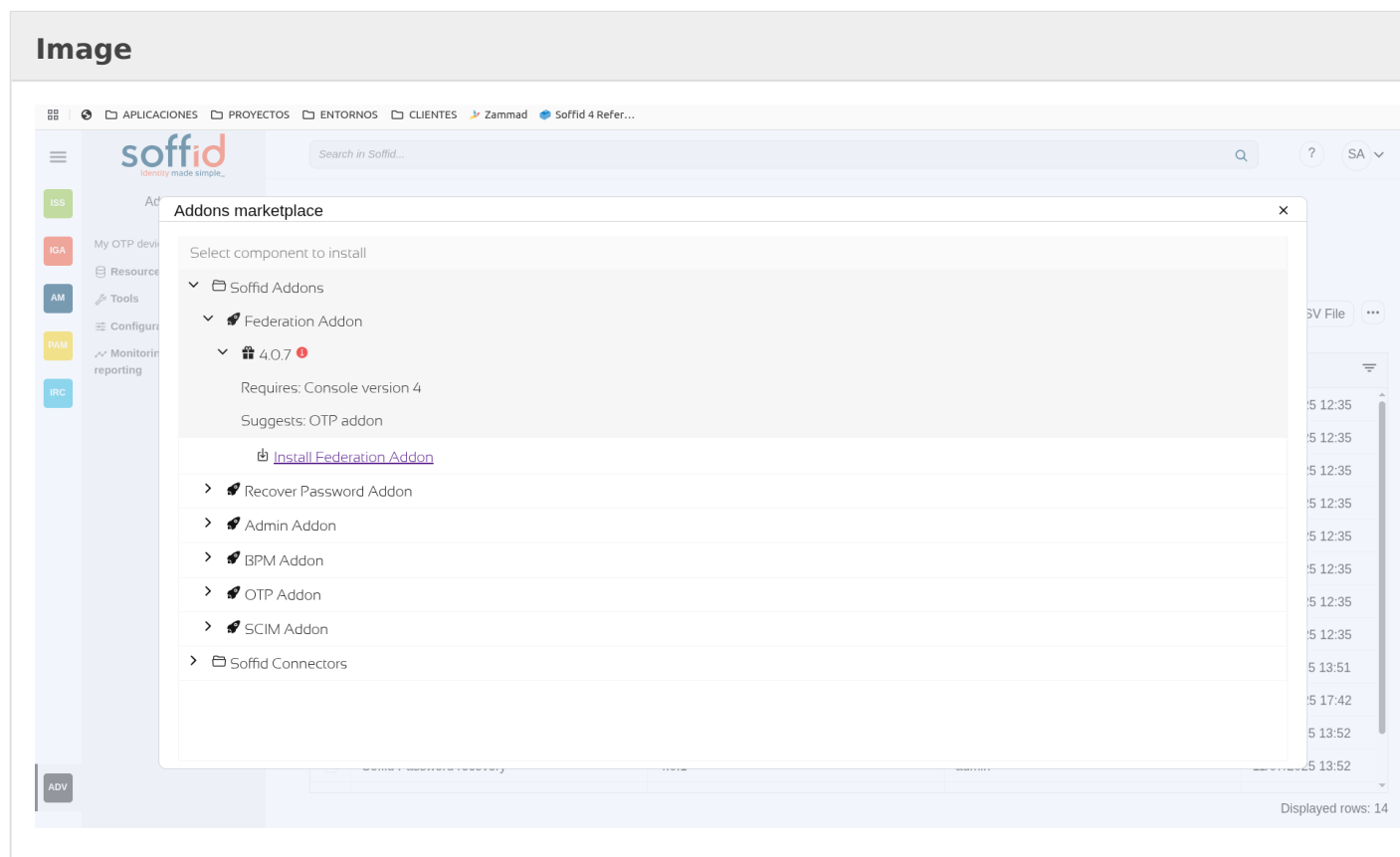
You need to be an **administrator** user of the Soffid console or a user with permission to upload addons.

It is recommended to upload the addons to the **master**, this is the way to maintain updated all, master and tenants if there are.

2. In the Soffid console, please **go to** the License and plugin page.

Main Menu > Configuration > Global Settings > License and plugin

3. Then, click the add button "**Add new**" button, open the "Soffid Addons" section and select the "Instlla addon" option, Soffid will upload the addon file.



APLICACIONES PROYECTOS ENTORNOS CLIENTES Zamrad Soffid 4 Refer...

soffid  
Identity made simple.

Search in Soffid...

ISS  
IGA My OTP dev  
AM Resource  
PAM Tools  
IRC Configur  
Monitoring reporting

ADDONS marketplace

### Plugin installation.

Please, confirm to install 'Federation Addon' in your platform

Install now

SV File ...

5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 12:35  
5 13:51  
5 17:42  
5 13:52  
5 13:52

ADV

Displayed rows: 14

APLICACIONES PROYECTOS ENTORNOS CLIENTES Zamrad Soffid 4 Refer...

soffid  
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ISS  
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Monitoring reporting

ADDONS marketplace

### Plugin installation.

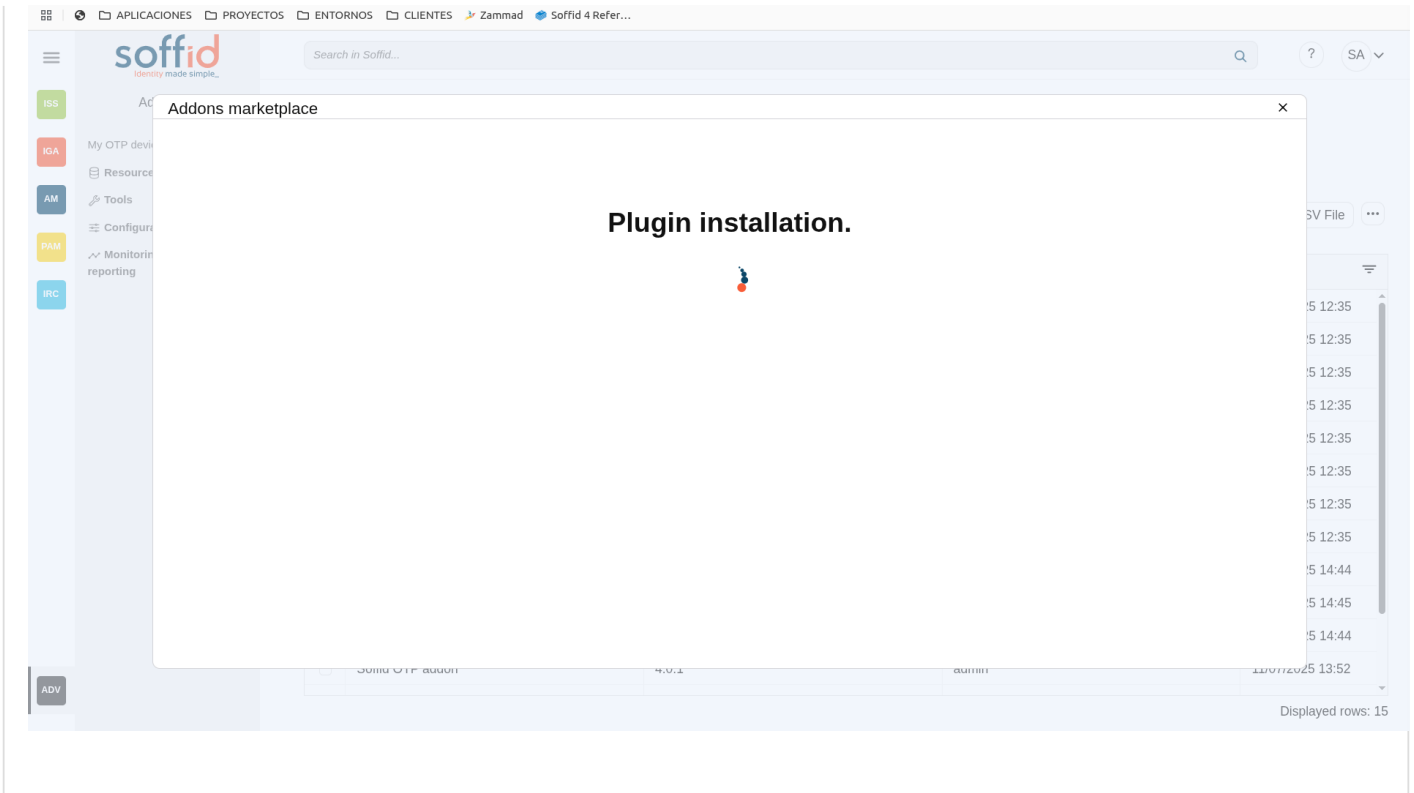
46%

SV File ...

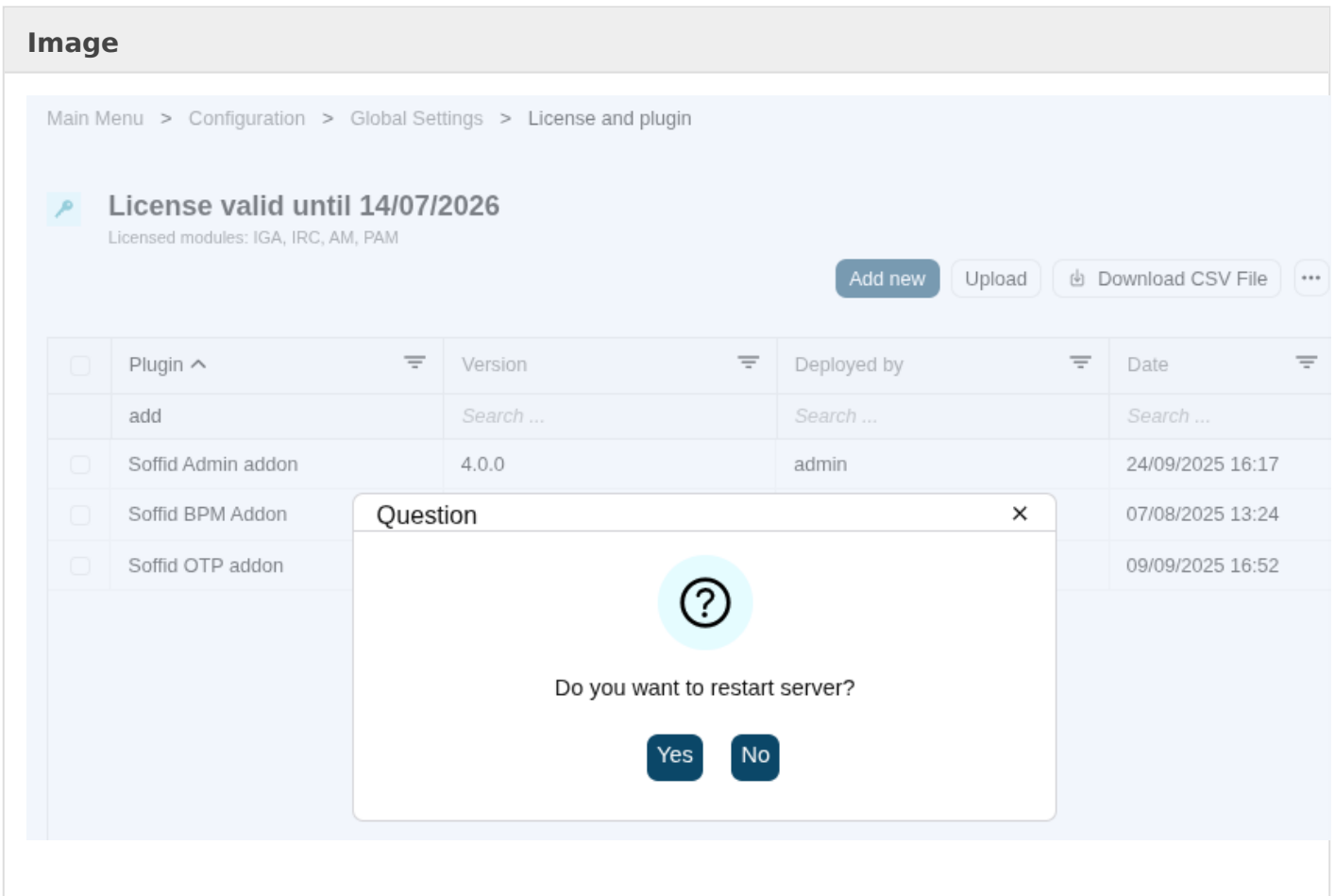
5 12:35  
5 12:35  
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5 12:35  
5 12:35  
5 12:35  
5 13:51  
5 17:42  
5 13:52  
5 13:52

ADV

Displayed rows: 14



4. Finally, when the addon is installed, the Consola has to be **restarted**, a popup will be displayed to perform this action, you can choose to do it now or later.



5. Once the Soffid console has restarted, you can **check** if the plugin was correctly uploaded on the "License and plugins" page.

Main Menu > Configuration > Global Settings > License and plugin

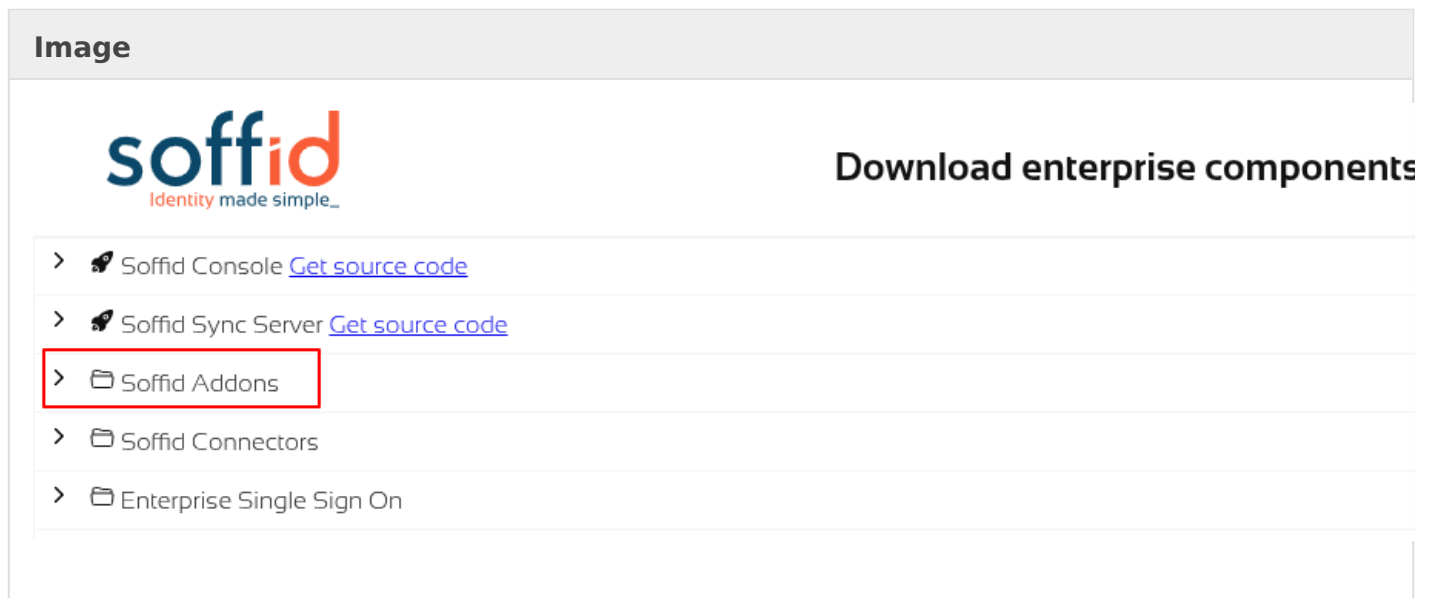
6. Now, you can **configure** the addon.

## Download an upload

1. You could **download** the addon at the following link

<http://www.soffid.com/download/enterprise/> if you have a Soffid user with authorization, or in the following <http://download.soffid.com/download/> by registering.

The addons are in the Addon section.



2. Once the addon is downloaded, please **log in** to IAM Console.

You need to be an **administrator** user of the Soffid console or a user with permission to upload addons.

It is recommended to upload the addons to the **master**, this is the way to maintain updated all, master and tenants if there are.

3. In the Soffid console, please **go to** the [License and plugin](#) page.

Soffid 3:

Main Menu > Administration > Configuration > Global Settings > Plugins

Soffid 4:

Main Menu > Configuration > Global Settings > License and plugin

4. Then, click the add button "**Upload**" and pick the file and click the "Select" button and Soffid will upload the addon file.


The screenshot shows the Soffid web interface. The top navigation bar includes a search bar and user information. The left sidebar contains navigation options like 'Advanced', 'My OTP devices', 'Resources', 'Tools', 'Configuration', 'Monitoring and reporting', and 'IRC'. The main content area displays the 'License and plugin' page, which shows a license valid until 14/07/2026 and a table of installed plugins. The 'Upload' button is highlighted with a red box. Below the main interface, an 'Open File' dialog box is open, showing a file explorer view of the 'addons' directory. The dialog box has 'Cancel' and 'Select' buttons. The file list in the dialog box is as follows:

Name	Size	Type	Modified
admin-addon-4.0.0.jar	293,1 kB	Archive	7 ago
admin-addon-4.0.2.jar	305,5 kB	Archive	3 nov
admin-addon-4.0.3.jar	306,2 kB	Archive	11 dic
backup-addon-4.0.2.jar	124,3 kB	Archive	3 nov
bpm-addon-4.0.1.jar	729,5 kB	Archive	11 jul
bpm-addon-4.0.3.jar	731,7 kB	Archive	5 ago

5. Finally, when the addon is installed, the Consola has to be **restarted**, a popup will be displayed to perform this action, you can choose to do it now or later.

## Image


Main Menu > Configuration > Global Settings > License and plugin

 **License valid until 14/07/2026**  
Licensed modules: IGA, IRC, AM, PAM

[Add new](#) [Upload](#) [Download CSV File](#) [...](#)

<input type="checkbox"/>	Plugin ^	Version	Deployed by	Date
	add	<i>Search ...</i>	<i>Search ...</i>	<i>Search ...</i>
<input type="checkbox"/>	Soffid Admin addon	4.0.0	admin	24/09/2025 16:17
<input type="checkbox"/>	Soffid BPM Addon			07/08/2025 13:24
<input type="checkbox"/>	Soffid OTP addon			09/09/2025 16:52

Question



Do you want to restart server?

[Yes](#) [No](#)

**6.** Once the Soffid console has restarted, you can **check** if the plugin was correctly uploaded on the "License and plugins" page.

Main Menu > Configuration > Global Settings > License and plugin

**7.** Now, you can **configure** the addon.

# Recertification policies

## Description

Soffid allows you to establish some policies to define the scope of the recertification process.

## Menu option

Main Menu > Administration > Configuration > Security settings > Recertification policies

## Screen overview

[Main Menu](#) > [Administration](#) > [Configuration](#) > [Security settings](#) > [Recertification policies](#) < 7 / 7

Name :	<input type="text" value="sharedAccountEntitlements"/>
Type :	<input type="text" value="Shared account entitlements"/>
Filter :	<input type="text" value="Filter"/>
Step 1 expression :	<pre>account = serviceLocator.getAccountService().findAccountById(grant.accountId); StringBuffer sb = new StringBuffer(); for (owner : account.ownerUsers) {     if (sb.length() &gt; 0)         sb.append(" "); }</pre>
Step 2 expression :	<pre>account = serviceLocator.getAccountService().findAccountById(grant.accountId); StringBuffer sb = new StringBuffer(); for (owner : account.ownerUsers) {     if (sb.length() &gt; 0)         sb.append(" "); }</pre>
Step 3 expression :	<input type="text" value="Step 3 expression"/>
Step 4 expression :	<input type="text" value="Step 4 expression"/>
Mail template :	<input #"="" type="text" value="Dear \${fullName} Follow this link to complete the &lt;a href="/> review process"/>

## Custom attributes

- **Name:** name to identify the policy
- **Type:** list of available recertification types.
  - **User entitlements:** the recertification process will be conducted to review user access rights.
  - **Role definitions:** the recertification process will be conducted to review the relationship between roles.

- **Share account entitlements:** the recertification process will be conducted to review access rights to shared accounts.
- **Filter:** this allows you to define a script to identify the grant list to which to apply the recertification process. The **grant object** (\*1) is always available. You can use the Enumeration SoDRisk to compare:
  - **SOD\_LOW**
  - **SOD\_HIGH**
  - **SOD\_FORBIDDEN**
  - **SOD\_NA**
- **Step 1 expression:** this allows you to define a script to determine who is or are in charge to approve or deny the recertification process in the first level.
- **Step 2 expression:** this allows you to define a script to determine who is or are in charge to approve or deny the recertification process after the first level of approval.
- **Step 3 expression:** this allows you to define a script to determine who is or are in charge to approve or deny the recertification process after the second level of approval.
- **Step 4 expression:** this allows you to define a script to determine who is or are in charge to approve or deny the recertification process after the third level of approval.
- **Mail Template:** this allows you to define a template to send an email to the people in charge to approve or deny. Be in mind, that to work fine, the review process link must be `#{url}`

(\*1) **grant object** is a [com.soffid.iam.api.RoleAccount](#) object.

## Examples

Some sample scripts for the filters and approval steps are shown below

### Filter

Return all grants with risk.

```
return grant.sodRisk != null
return grant.sodRisk != es.caib.seycon.ng.comu.SoDRisk.SOD_NA;
```

### Steps

```
account = serviceLocator.getAccountService().findAccountById(grant.accountId);
StringBuffer sb = new StringBuffer();
```

```

for (owner : account.ownerUsers) {
  if (sb.length() > 0)
    sb.append(" ");

  sb.append(owner);
}
if (sb.length() > 0)
  return sb.toString();
else
  return "admin";

```

```

com.soffid.iam.api.Role role =
serviceLocator.getApplicationService().findRoleByNameAndSystem(grant.roleName, grant.system);
StringBuffer sb = new StringBuffer();
List owners = role.getAttributes().get("owner");
if (owners != null) {
  for (owner : account.ownerUsers) {
    if (sb.length() > 0)
      sb.append(" ");

    sb.append(owner);
  }
}

if (sb.length() == 0)
  return "admin";
else
  return sb.toString();

```

## Mail template

The screenshot shows a web-based JavaScript Editor interface. At the top, there is a search bar and a toolbar with various icons for editing. Below the toolbar, there is a text area containing a mail template. The template starts with a paragraph containing a link URL input field with a placeholder "\${url}" and a green checkmark and red X icon. The text below the input field reads: "Dear \${fullName}, Follow this link to complete the [review process](#)". In the bottom right corner of the editor, there is a small green circular icon with a white 'G' and a yellow notification bubble with the number '1'.

# Actions

## Recertification policies query

<b>Add new</b>	Allows you to add a new Recertification policy. You can choose that option on the hamburger menu or click the add button (+). To add a new it is necessary to fill in the required fields.
<b>Delete</b>	Allows you to remove one or more Recertification policies 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>	Allows you to upload a CSV file with the Recertification policies to add or update the attribute definition to Soffid. 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 click the Import button.
<b>Download CSV file</b>	Allows you to download a CSV file with the basic information of all Recertification policies.
<b>Add or remove columns</b>	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 the page to the user.

## Recertification policies details

<b>Apply changes</b>	Allows you to <b>save</b> the data of a new policy or to update the data of a specific policy <b>and quit</b> . To save the data it will be mandatory to fill in the required fields.
<b>Save</b>	Allows you to <b>save</b> the data of a new policy or to update the data of a specific policy. To save the data it will be mandatory to fill in the required fields.
<b>Delete</b>	Allows you to remove a specific policy. You can choose that option on the hamburger icon. To perform that action, Soffid will ask you for confirmation, you could confirm or cancel the operation.
<b>Undo</b>	Allows you to quit without applying any changes.

---

<https://download soffid.com/doc/console/latest/uml/es/caib/seycon/ng/comu/SoDRisk.html>

# Recertification campaigns

## Description

Soffid allows you to define new campaigns to review the users' access rights and to assign who has to recertify or revoke their entitlements.

You can create a campaign related to a previously defined recertification policy. Depending on the policy type selected, you will have to fill in some required information to create a new campaign.

To create a new campaign, will be mandatory that one or more accounts for recertification exist.

When a campaign is created, the initial status will be **Preparation**. This status will change to **Active** automatically. The **Finished** status will be when the proper users approve or deny the recertifications

## Menu option

Main Menu > Administration > Resources > Recertification campaigns

## Screen overview

The screenshot displays the Soffid interface for a recertification campaign. The top navigation bar includes the Soffid logo, a search bar, and a user profile icon. The breadcrumb trail is: Main Menu > Administration > Resources > Recertification campaigns < 3 / 12 >. The campaign details are as follows:

- Name: campaign25
- Start date: 5/25/22, 11:43 AM
- Finish date: 5/25/22, 11:47 AM
- Status: Finished

Below the details are two tables: **Groups** and **Applications**.

Group	Status	% done
marketing	Finished	100

Displayed rows: 1

Application	Status	% done
Operation/RemoteSystem	Preparation	

Displayed rows: 1

A **Show details** button is visible. The details view shows a table with the following columns: Group, User, Entitlement, Previous endorsement, Pending e..., and Comments.

Group	User	Entitlement	Previous endorsement	Pending e...	Comments
marketing	Elizabeth Taylor	TEST RECERTIFICACIÓN	<input checked="" type="checkbox"/> frank - Frank Sinatra 5/25/22, 11:44 AM <input checked="" type="checkbox"/> bob - Bob Dylan 5/25/22, 11:45 AM		Frank Sinatra:
marketing	Lauren Bacall	TEST RECERTIFICACIÓN	<input checked="" type="checkbox"/> frank - Frank Sinatra 5/25/22, 11:46 AM <input checked="" type="checkbox"/> bob - Bob Dylan 5/25/22, 11:47 AM		Frank Sinatra:

# Custom attributes

## Basic

- **Name:** name to identify the campaign.
- **Template:** select the policy that will be applied. That has to be defined previously on the [Recertification policies page](#).
- **Groups:** list of user groups where the campaign will be applied. You can choose one or more.
- **Information Systems:** list of information systems where the campaign will be applied. You can choose one or more.

## Others

- **Start date:** date and time when the campaign started. This field is generated automatically.
- **Finish date:** date and time when the campaign finished. This field is generated automatically.
- **Status:** recertification campaign process status. Three statuses are available:
  - **Preparation:** it is the first status when the campaign is created.
  - **Active:** it is the status when the recertification campaign is ready to be applied.
  - **Finished:** it is the status when the recertification campaign ends.
- **Groups:** users groups list to which the campaign will be applied.
  - **Group name**
  - **Status**
  - **% done**
- **Applications:** application list to which the campaign will be applied.
  - **Application name**
  - **Status**
  - **% done**
- **Group members:** list of users who belong to the selected group.
  - **Active**
  - **User**
  - **Creation date**
  - **Status**
  - **Step 1**
  - **Step 2**
  - **Step 3**
  - **Step 4**

# Actions

## Recertification campaigns query

<b>Add new</b>	Allows you to add a new Recertification policy. You can choose that option on the hamburger menu or click the add button (+). To add a new it is necessary to fill in the required fields.
<b>Delete</b>	Allows you to remove one or more Recertification policies 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>	Allows you to upload a CSV file with the Recertification policies to add or update the attribute definition to Soffid. 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 click the Import button.
<b>Download CSV file</b>	Allows you to download a CSV file with the basic information of all Recertification policies.
<b>Add or remove columns</b>	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 the page to the user.

## Recertification campaigns details

<b>Click group</b>	By clicking a record group, Soffid will display the group members' list.
<b>Show details</b>	Displays a detailed list with the recertification data for each user to recertificate.
<b>Delete</b>	Allows you to delete a recertification campaign. You can select this option on the hamburger menu. It is not allowed to delete a recertification process once it has been started.

## Recertification details

<b>Delegate</b>	Allows you to delegate to another user the recertification by clicking a record group or by selecting one or more records, Soffid will display the group members' list.
-----------------	---

**Back**

Allows you to delegate the operation to approve or deny the process. Once you click the delegate option, Soffid will allow you to select one or more users to delegate the process.

# Recertifications to do

## Description

When a campaign is run, the pending recertifications will be displayed in the Recertifications to-do list of the proper user who has to Accept or Deny the recertification. The user who has to manage the recertification can delegate it as well to another user to manage it.

## Menu option

Main Menu > Recertifications to do

## Screen overview

The screenshot shows the Sofid application interface. At the top, there is a search bar and a breadcrumb trail: "Main Menu > Recertifications to do 1 / 3". Below this is a table with the following columns: Group, User, Entitlement, Previous e..., Pending..., and Comments. The table contains 7 rows of data. At the bottom of the table, there is a "Delegate" button and a "Displayed rows: 7" indicator. At the bottom right, there are "Back" and "Apply now" buttons.

<input type="checkbox"/>	Group	User	Entitlement	Previous e...	Pending...	Comments
<input type="checkbox"/>	Movie Stars	Elizabeth Taylor	SOFFID Administrator		<input checked="" type="checkbox"/>	asdfg
<input type="checkbox"/>	Movie Stars	Elizabeth Taylor	SOFFID_DEV		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Music	Frankaaa Sinatra	SOFFID Administrator		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Music	Frankaaa Sinatra	SOFFID_DEV		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Music	Frankaaa Sinatra	SOFFID_HRMANAGER		<input checked="" type="checkbox"/>	asfg
<input type="checkbox"/>	Music	Freddie Mercury	SOFFID_HRMANAGER		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	scientist	Galileo Galile	SOFFID Administrator		<input checked="" type="checkbox"/>	

## Custom attributes

### Recertifications campaign list

- **Name:** name to identify the campaign.

- **Start date:** date and time when the campaign started.

## Recertifications to do list



- **Group:** group to which recertification applies.
- **User:** user to whom permissions will be assigned or not. If you click the user, Soffid will display a new page with the user data.
- **Entitlement:** the role that you can assign or not to the user. If you click the role, Soffid will display a new page with the role data.
- **Previous endorsement:** status previous endorsement.
- **Pending endorsement:** allows you to select the option to approve or deny.
- **Comments:** this allows you to write a comment.

# Actions

## Recertifications campaign

<b>Click recertification</b>	If you click one campaign record, Soffid will display the recertifications to do list.
------------------------------	--

## Recertifications to do list

<b>Pending endorsement</b>	<p>In the pending endorsement column, you can approve or deny the recertification for each user who appears on this list. You can approve or deny by clicking on the proper check</p> <ul style="list-style-type: none"> <li>• approve -&gt; </li> <li>• deny -&gt; </li> </ul>
<b>Apply changes</b>	<p>Allows you to <b>save</b> the recertifications accepted and denied. Before applying changes, you need to select for each recertification if you approve or deny it. Also, you can write a comment.</p> <p>Once you apply changes, the recertifications executed will be removed from the recertifications to do list.</p>
<b>Back</b>	Allows you to quit without applying any changes.

<b>Delegate</b>	Allows you to delegate the operation to approve or deny the process. Once you click the delegate option, Soffid will allow you to select one or more users to delegate the process.
<b>Browse user</b>	By clicking the user, Soffid will open a new window with the user data.
<b>Browse entitlement</b>	By clicking the entitlement, Soffid will open a new window with the role data

# Recertification Examples

Recertification Examples

Recertification Examples

# Shared account entitlements

<https://www.youtube.com/embed/F4SWomWhOes>