File Access Manager

My Tasks

Version: 8.3 Revised: March 29, 2022

Contents

Managing Access Certification Campaigns

The following section provides in depth detail for users to manage certain aspects of their Access Certification campaigns. This section will include:

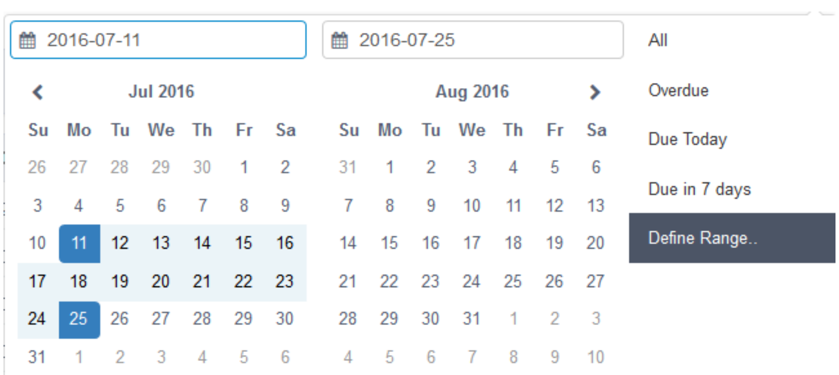
- Viewing Access Requests
- Reviewing the History of an Access Request
- Utilizing Bulk Action
- Filtering Your View
- Viewing Results as Graphs

Viewing Access Certifications

To filter campaigns displayed by default, perform the following steps:

1. Click the Access Certification tab.
2. Click **Filters** at the top right of the displayed list.
3. Select one of the following options from the Applications dropdown menu:
    - All
    - [Name of Relevant Application]
4. Select one of the following options from the Current Status dropdown menu:
    - All
    - In Process
    - Closed
5. Select one of the following options from the Due Date dropdown menu:
    - All
    - Overdue
    - Due Today
    - Due in 7 Days
    - Define Range …
      If you select “Define Range …”, a two-month calendar view displays, as shown in the figure below.
        a. Select a start date.
        b. Select an end date.

        > The selected date range displays in the Due Date dropdown box.

    Two-Month Calendar View for Define Range…

6. Select the **Reset** button below the dropdown menus, on the far right of the screen, to reset all the filters.

> Once you have selected the Applications, Current Status, and Due Date filters, the word “Filters” in the Filters button changes from gray lettering on a white background to white lettering on a green background.

The filtered Access Certification tasks display in a table below the dropdown menus, with the following columns:

Due Date

In mmddyyyy format – Displays Expired (in red), Expires soon (in yellow), or is empty

Name

The name of the campaign

Application

The application related to the campaign

Current Status

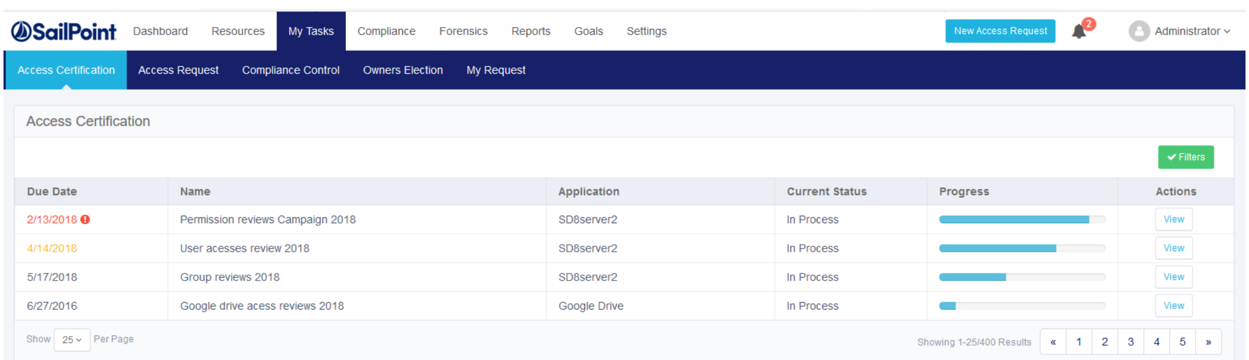
The current status of the campaign

Progress

A progress bar, showing the relative progress made in the campaign

Actions

Selection of the **View** button in the same row as a given campaign to display the access certification details.

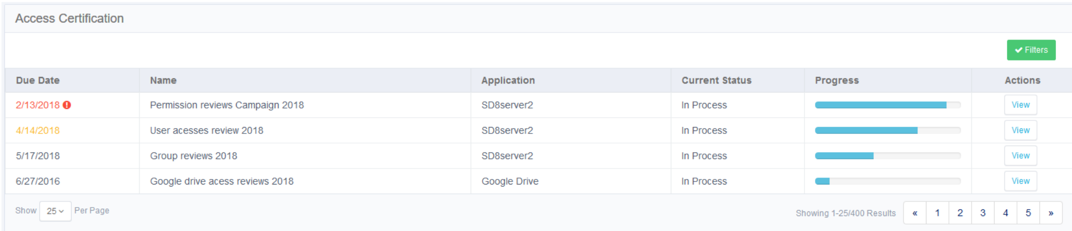


Access Certification Task Details

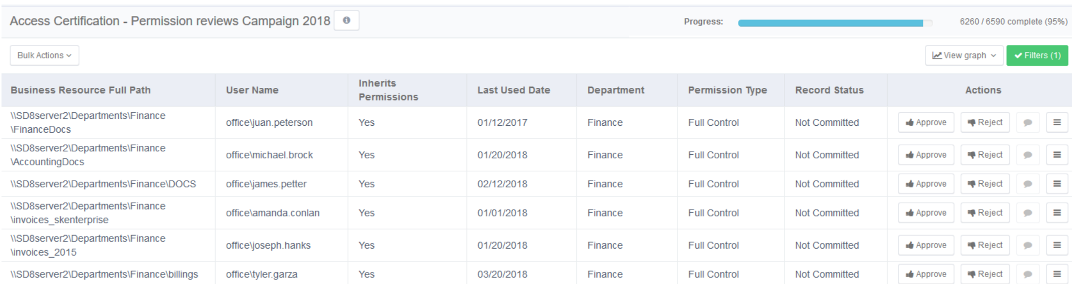
Administrators execute campaigns that generate access certification tasks for the campaigns’ reviewers. This window gives a business user an easy and intuitive way to approve/reject hundreds of thousands of permissions in the selected campaign, and features advanced filtering capabilities and representation of the permissions, based on grouping criteria, in chart form.

To view access certification details for a selected task, click **View** under the Actions column of the task to be viewed.

The Access Certification detailed task screen shows permissions for the business data owner to review. This screen is similar to the task screens for Access Request . The displayed columns vary, based upon the administrator’s selections. An administrator can set other columns in an Object’s template in the Administrative Client.



A detailed task screen of the selected task displays.



Detailed Task Screen

If a campaign has instructions, the left side of the Access Certification detailed task screen first row displays the name of the campaign and a link to display the campaign’s instructions.

The right side of the first row contains a progress bar that displays how far this task as progressed.

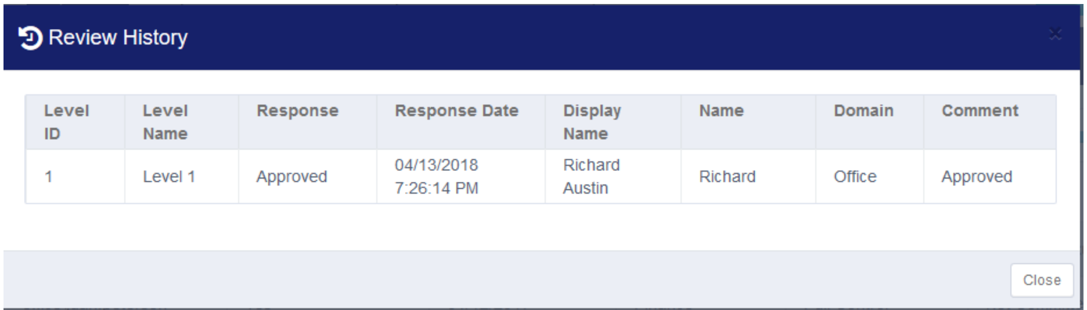
The columns in the main Access Certification detailed task screen are dynamic.

The Actions column options are: Approve, Reject, Comment, and Select.
The Select options are: Review History and User’s Permission Paths.

> Sort a column in alphabetical or numerical order by selecting any of the column headings

Reviewing the History of an Access Certification

When you click Review History, the Review History box displays.



The Review History columns include:

- Level ID
- Level Name
- Response
- Response Date
- Display Name
- Name
- Domain
- Comment

> If no history is available, the window displays the following text: “There is no Review History to show”. All a reviewer’s selections (approve, reject, comment, history) display the next time the reviewer checks My Tasks.

When you select User’s Permission Paths, the permission paths display.

- When finished filtering, click **Approve** to approve the filters, or **Reject** to reject the filters.
- Click **Commit** to save changes or **Close** to close without saving changes.

To navigate within the Detailed Task List:

The bottom of the Detailed Task screen displays the previous (Prev) or next (Next) screen, and the number of the total number of screens displayed (for example, 1/2 indicates that the first of two screens displays).

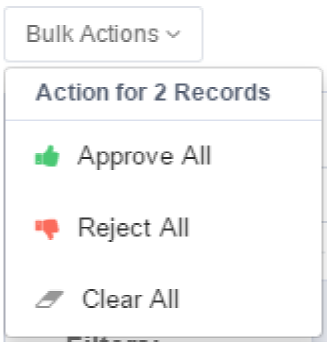
- To see more results per page (the default is 10), select the dropdown menu on the left side of the screen to choose 10, 25, 50, or 100 results per page.

- To navigate from the current page to the previous page, click **Prev** or **<** at the bottom right of the page.
- To navigate from the current page to the next page, click **Next** or **>** at the bottom right of the page.

Utilizing Bulk Actions

To execute bulk actions on all permissions in a current filter, perform the following steps:

1. Click **Bulk Actions**. A dropdown menu displays, showing the number of records in the filter results, with the following options:
    - Approve All – Changes all Pending Decision status rows in the current filter results to Pending Commit status
    - Reject All – Changes all Pending Decision status rows in the current filter results to Pending Commit status
    - Clear All – Changes all Pending Decision status rows in the current filter from Pending Commit status to Pending Decision status. You cannot revert committed rows.

2. Click **Yes** to clear all records, or click **No** to return to the previous screen.

Filtering the Filters

Click **Filters** at the far right to filter table rows, based on displayed fields, operators, and values, as follows:

Fields

This includes all the column headings listed above.

The static fields that do not display in the table columns are: 1. Record Action – options are Approved\Rejected.and 2. Record Status – options are “Pending decision”, “Pending Commit”, “Committed” and “Not Committed”.

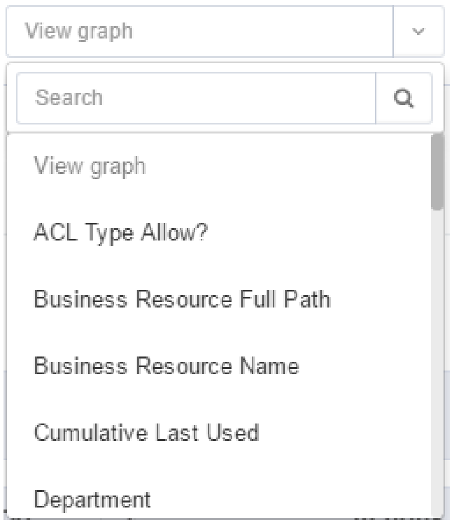
Operators

- Contains – free text
- Equals – auto-completes the value (the only choice for the static fields listed above)
- Starts with – free text
- Empty – no value
- Value – Values based upon the operator selected

Viewing Results as Graphs

To the right of the Bulk Actions dropdown menu is a View Graph dropdown menu that provides various selections of graph views.

Graphs are a convenient way to view the results of filtering, and are available from the dropdown menu, immediately to the right of **Bulk Actions**. The graph groups filtered results per the selected field in the menu. There are as many chart views as there are fields.



To view filters as a graph, perform the following steps:

1. Click the **View Graphs** dropdown menu, and select a chart view. A bar chart view displays, with different colored columns and a key to the chart.

In Viewing Access Certifications, **Department** was selected as the chart view and separate bar charts display for Dept1, Dept2, and Null (No department).

Viewing Access Certifications shows a magnified view of the chart key for the chart in Viewing Access Certifications, in which different colors are used for tasks that are Pending (gray), Approved (dark green), Approved and Committed (light green), Rejected (dark red), and Rejected and Committed (light red).

2. Click a chart column.
   A pop up screen displays an entire column (with the number of items in parentheses) or a portion of the column (with the number of items in parentheses).

3. Click Pending for Action.
   A dialog displays with the following options:

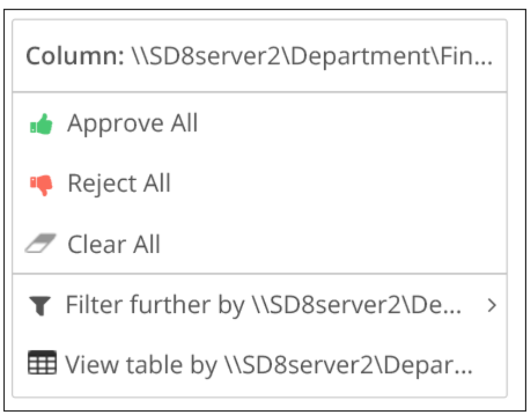
   - Approve All
   - Reject All
   - Clear All

4. Click Approve All, Reject All, or Clear All. A Question Dialog displays, asking for confirmation, and providing space for a free text comment (only for Approve All or Reject All).

5. Click **Yes** to confirm, or click **No** to return to the previous screen.

6. Alternatively, click **Entire Column**.
   A dialog displays with the following options:

   - Approve All
   - Reject All
   - Clear All
   - Filter further by (filtered item) – Displays additional selected filtering
   - View table by (filtered item) – Displays the table with the applied filters



7. Select Chart Filtered by (filtered item).
   A dialog displays with field options for chart groups.

8. Click a field for chart groups.

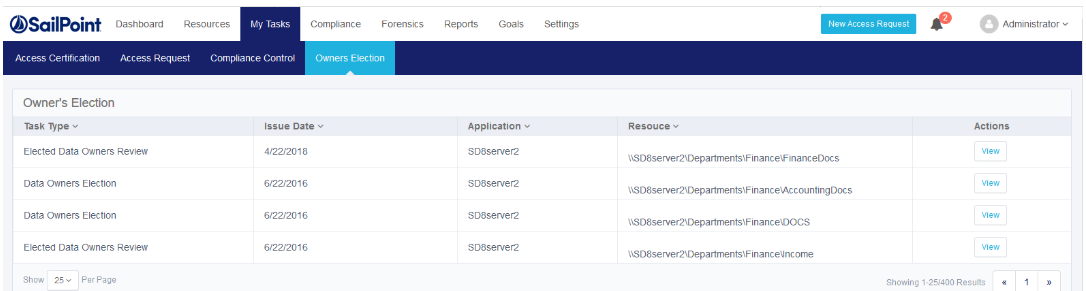
> After selecting a field, the chart displays, grouped by the new field and filtered by the selected value (in this case, Dept2). This is not a bulk action.

Data Owners Election

To view Owners Election tasks displayed by default, click the Owners Election tab.

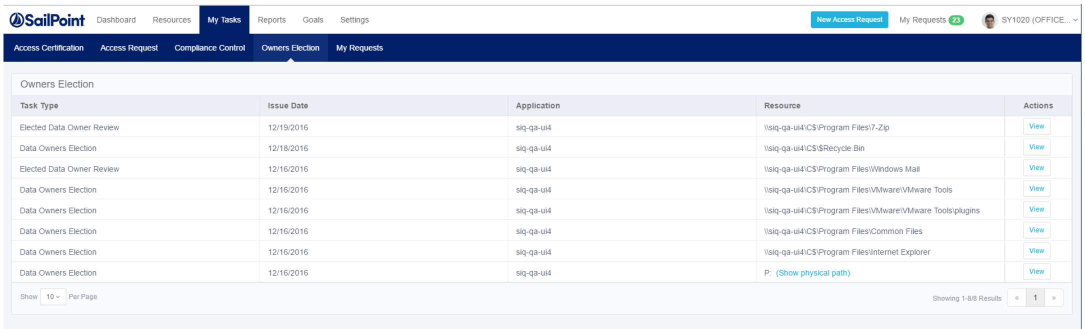
The Owners Election tasks display in a table with the following columns:

- Task Type – Displays the task type (for example, Elected Date Owner Review or Data Owners Election)
- Issue Date – The date of the election or review, in mm/dd/yyyy format
- Application – The application of the resource for which a data owner was elected
- Resource – The resource for which a data owner was elected
- Actions – Click the **View** button in the same row as a given access certification to display the details of that access certification.



Owners Election Task Details

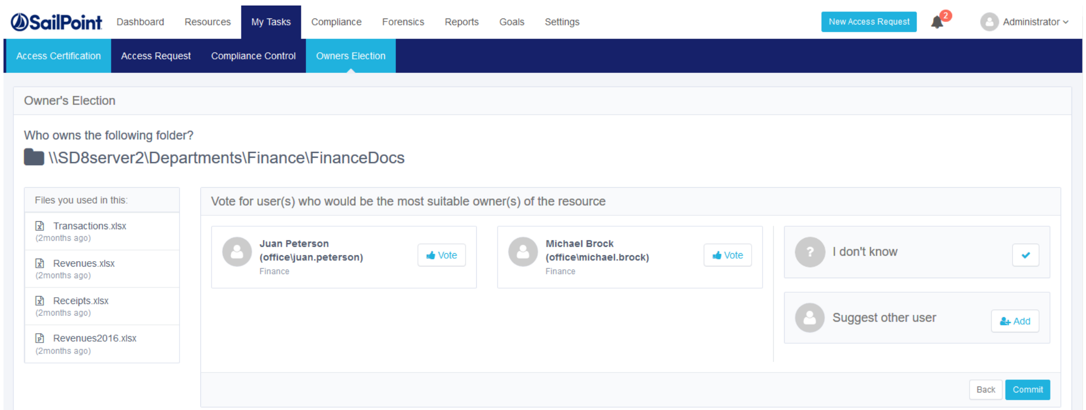
After an administrator has executed one or more goals, those goals will be displayed in the main screen of **My Tasks > Owners' Election** for the user to act.



Data Owners Election

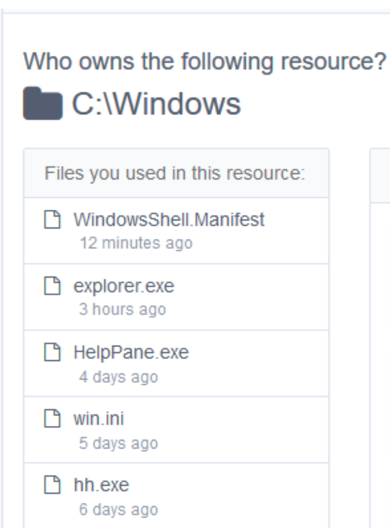
Navigate to **My Tasks > Owners' Election**.

Click the **View** button under Actions on the far right of one of the "Data Owners Election" task types to display the "Who owns the following resource?" screen for that task.



The resource name displays at the top left of the screen. In "Who owns the following resource?" Screen, the resource is **C:\Windows**.

Under the resource is a list of files that the logged-in user used and an indication of how long ago each file was used.



To vote for a probable data owner:

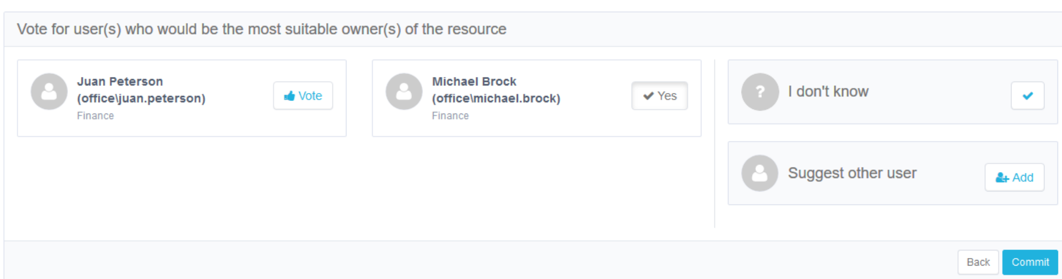
1. Click the Vote button to vote for one or more of the displayed probable data owners.
   The probable data owner's status changes from a blue thumbs-up with "Approve" on a white background to a white check mark with "Yes" on a green background.
2. Click **Yes** again (which is a toggle switch between "Vote" and "Yes") to withdraw your vote.

3. Click **Add** to the right of *Suggest other user* to select a prospective data owner whose name is not already displayed.

4. The *Please choose a user* search box displays.
5. Type the account name, or the first few characters of the name, in the search box.
   A list of accounts displays below the search box, with an indication of the number of results (a maximum of 50 results) displayed.
6. Select a user's name.
7. Click **Add**.
   The user's name displays, with a green "Yes" button and a blue x to the right of the user's name. If you click the x, it removes the suggested candidate data owner.

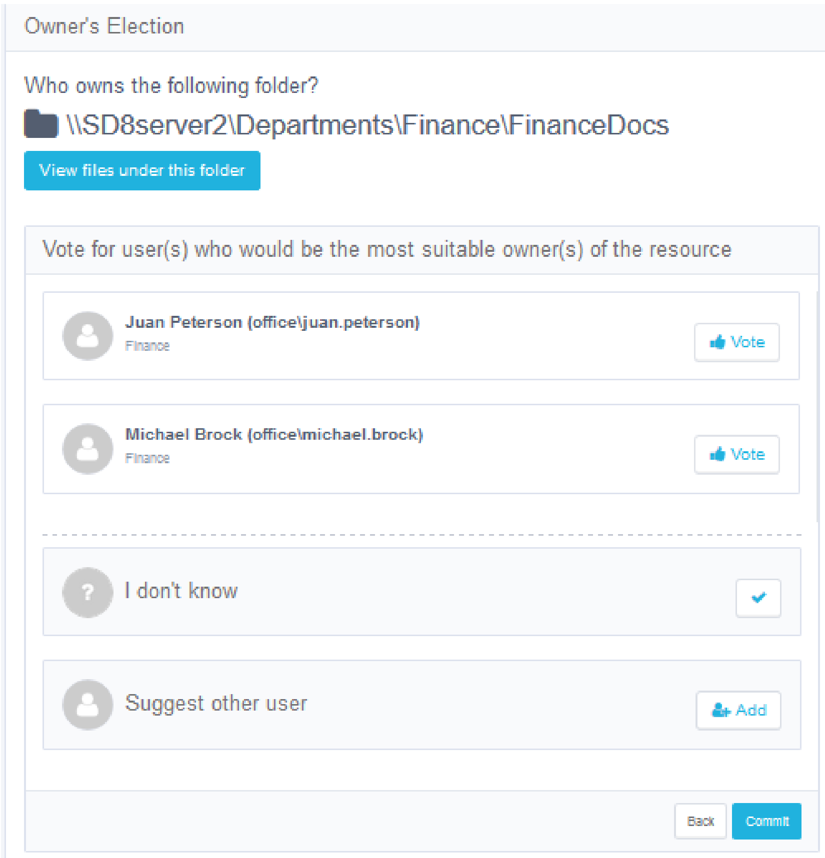
> After you have selected a name for the "Other" probable data owner, a new "Other" probable data owner displays, as shown in New "Other" Suitable Data Owner (Michael). You can vote for up to two "Other" data owner candidates.

> If you attempt to vote for more than two "Other" data owner candidates, the following error message displays: "You cannot add more than two other users."



8. Click **I Don't Know** if you do not know for whom to vote.
   Selecting "I Don't Know" cancels all the votes.
9. Click **Commit** in the *Who owns the following folder* screen to complete the election process. Otherwise, click **Discard** in that screen to discard the voting results. The Commit choice is not available until you have voted for at least one candidate.
10. If you click **Discard**, a Question dialog displays, asking whether you want to discard all actions taken. click **Yes** to discard all the actions or click **No** to return to the "*Who owns the following folder?*" page.

If a smaller screen is used, the display adjusts responsively to accommodate the information differently, as shown in the figure below. You can view the files used by selecting “Files you used in this resource”.



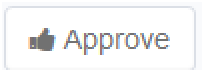
Elected Data Owner Review

To review the results from the Data Owners Election, and to make a final decision for a probable data owner:

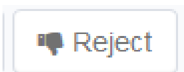
1. Navigate to **My Tasks > Owners' Election**.
   The Elected Data Owner Review task displays.

2. Click **View** under Actions to the far right of "Elected Data Owner Review" task type.

   The "Review Owners' Election" screen displays. The left and middle portions of the screen display the names of the first and second place candidates (as well as the third and fourth place candidates, depending upon the system settings) and the percentage of eligible voters who completed voting for those candidates. The right portion of the screen displays the names of the runner-up candidates.

3. Click 

   under the name of an elected owner to approve of that elected owner.

4. Click 

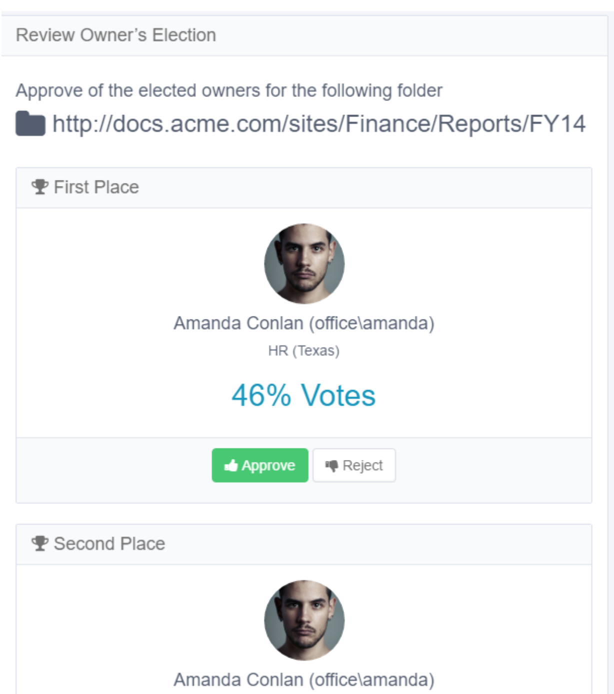
   under the name of an elected owner to disapprove of that elected owner.

   > Since each approval or disapproval is independent of the others, it is possible to approve or disapprove of some or all the elected owners, and it is possible to click Approve or Reject under the same candidate if you change your mind.

5. Click **Commit**.

   > It is not possible to click Commit until you have approved or rejected all the candidates (not the runners-up).

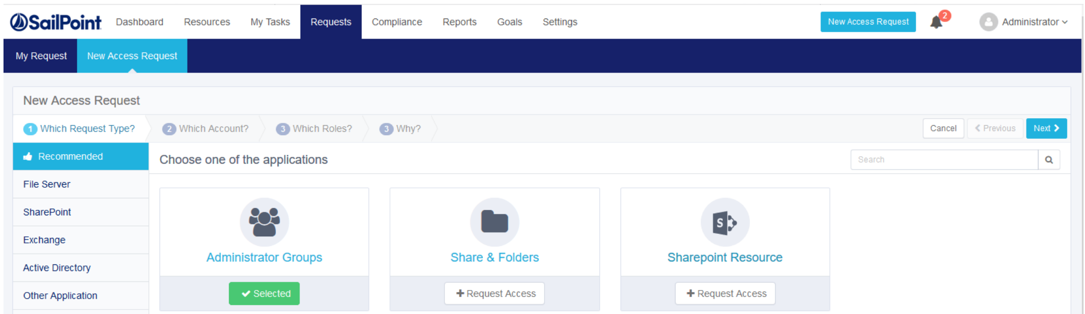
If a smaller screen is used, the display adjusts responsively to accommodate the information differently.



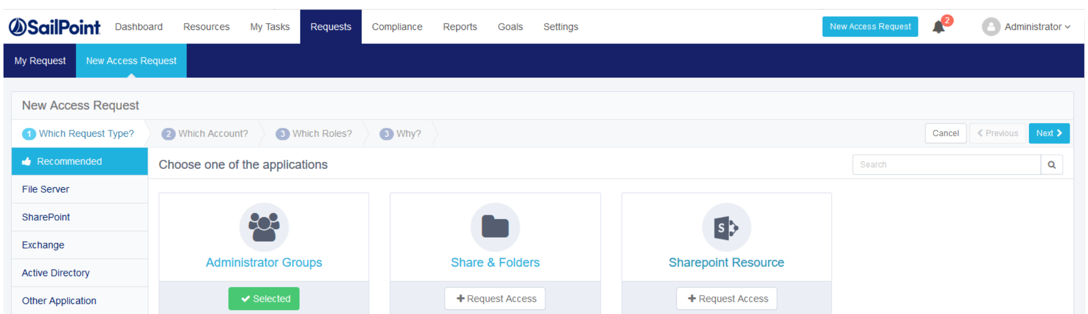
New Access Request Wizard

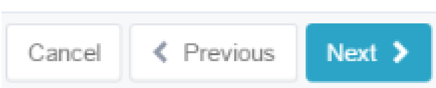
The New Access Request Wizard assists users in submitting new access requests, either for resource permissions, group memberships, or both.

Access the New Access Request Wizard by selecting New Access Request at the top right of the main window.



At any step (after the first step) of the New Access Request Wizard, you can return to the previous step by selecting **Previous** or you can cancel the wizard by selecting Cancel (both on the bottom right of the New Access Request window).

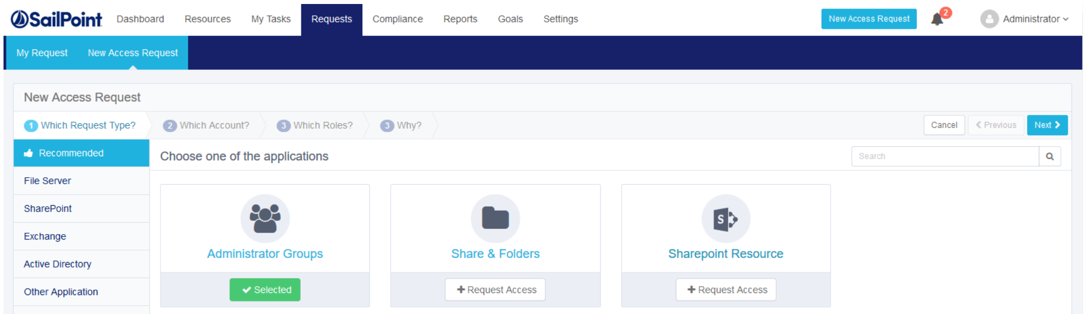




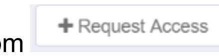
To run the New Access Request Wizard, perform the following steps:

1. Click **New Access Request**.
2. The **Which Request Type?** window displays.
3. Select Recommended from the list under “Which Request Type” (the default choice).
4. Click one of the request types: Administrative Groups (group membership), Shares & Folders (resource permissions), or SharePoint Resources (SharePoint resources permissions).

New Access Request Wizard

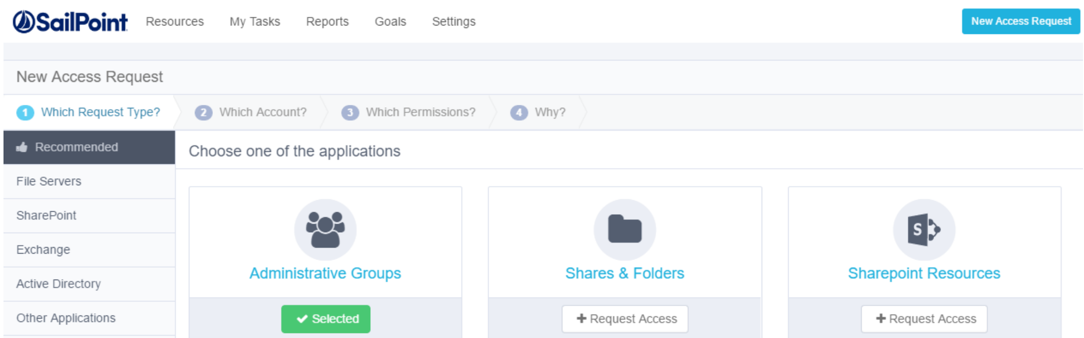


Administrative Groups

1. Click **+Request Access** under **Administrative Groups**. The button changes from 

(gray letters on a white background) to 

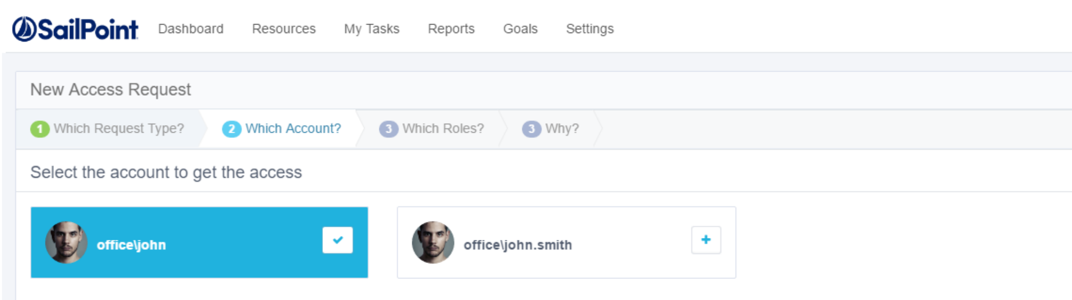
(white letters on a green background) to indicate that this access requested is now selected.



2. Click **Next** at the bottom right of the screen.

> At the bottom right of each screen, click:
> Cancel to cancel all your selections on this screen, or
> Previous, to return to the previous screen or
> Click one of the path milestones at the top of the screen, immediately under “New Access Request”, or
> Next to proceed to the next screen

3. The **Which Account?** window displays.



> If the logged-in user is associated with more than one account the wizard displays those accounts in the “Which Account? window. The logged-in user will be associated with more than one account if the administrator configured the “Unique User Account Mapping” in the Identity Collector configuration in the administrative client. If there is only one account, the wizard skips the Which Account? step, and displays the Which Groups? step.

4. Select the account to access by clicking the + sign to the right of the name of the account.

5. The plus sign next to the selected account changes to a check mark, and the account changes from gray letters on a white background to white letters on a blue background.

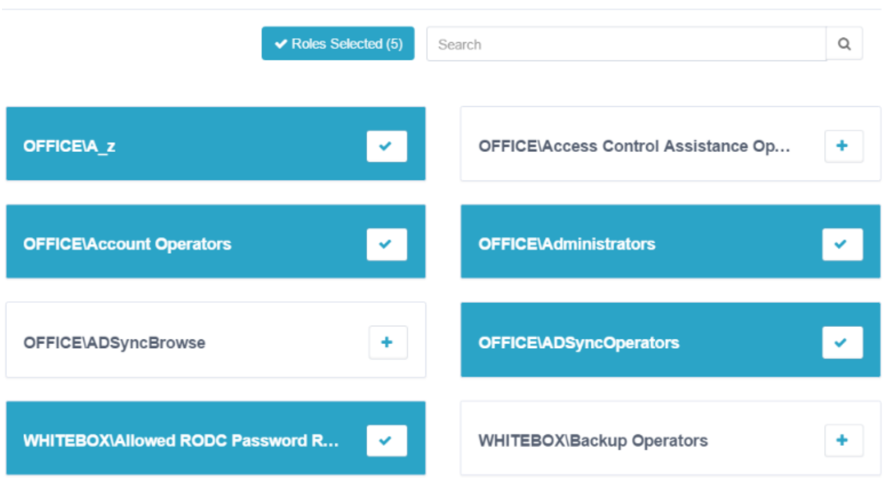
> Deselect accounts by unchecking the check mark next to the selected account.

The selected account name displays after the word “Selected” at the top of the window.

6. Click **Next**.
7. The **Which Groups?** window displays, with the top 50 results of available groups. These groups are all from the Authentication Store, which is the main domain, containing all users and groups.

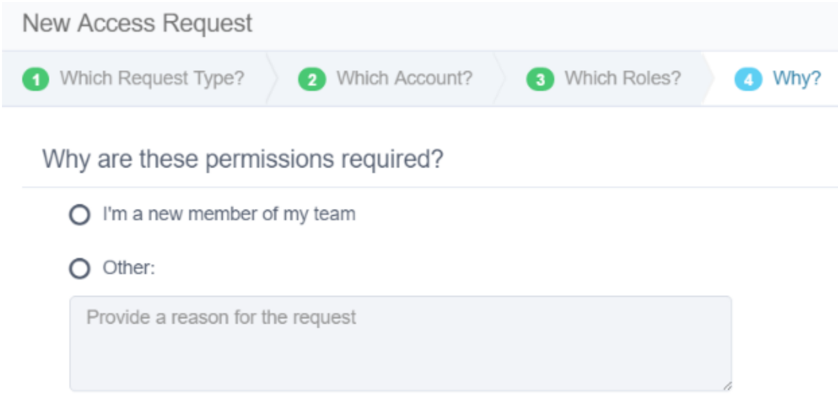
> You can also search for a group by typing the name of the group in the Search box at the top of the list of available groups.

8. Select the groups by clicking the **+** sign next to the name of each group to be selected.
9. The plus sign next to the selected groups changes to a check mark, and the number of selected groups displays in the Groups Selected box, to the left of the Search box.



> Deselect groups by unchecking the check mark next to the selected groups.

10. The selected group names display after the word “Selected” at the top of the window.
11. Click **Next**.
*The **Why?** window displays.*

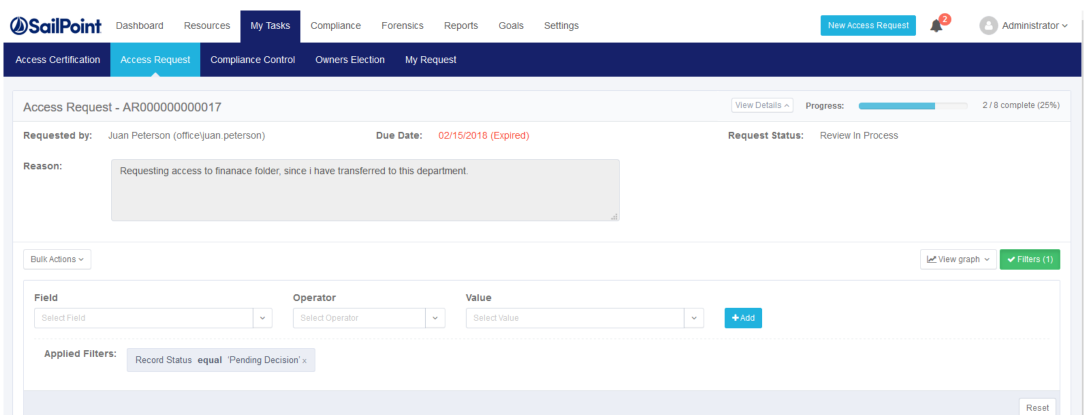


12. Click **I'm a new member of my team** or **Other**.
If you click "Other" provide a reason for the request in the box below "Other".

13. Click **Finish** at the bottom right of the window.
If the access request process succeeds, an Information dialog displays, noting that "Your request was successfully submitted".

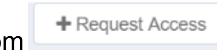
14. Click **OK**.
The "My Requests" button shows the updated total number of requests.

15. Click **View** on the right side of each request to view the details of that request.



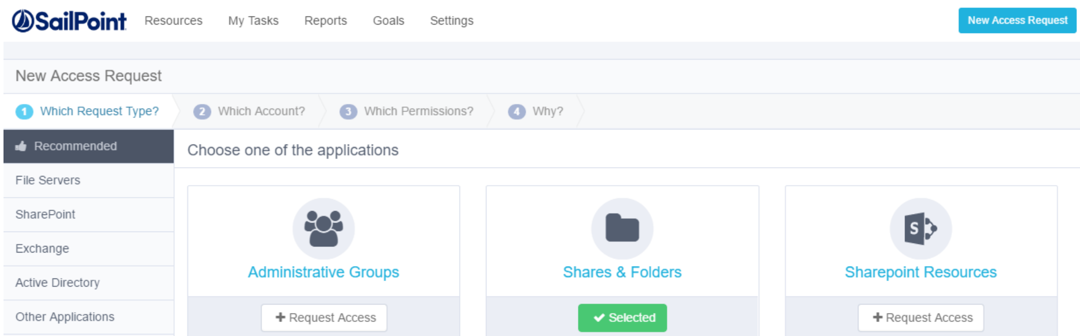
The File Access Manager Administrator Guide provides additional information the section Permissions / Access Requests.

Shares & Folders

1. Click **+Request Access** under **Shares & Folders**. The button changes from 

(gray letters on a white background) to 

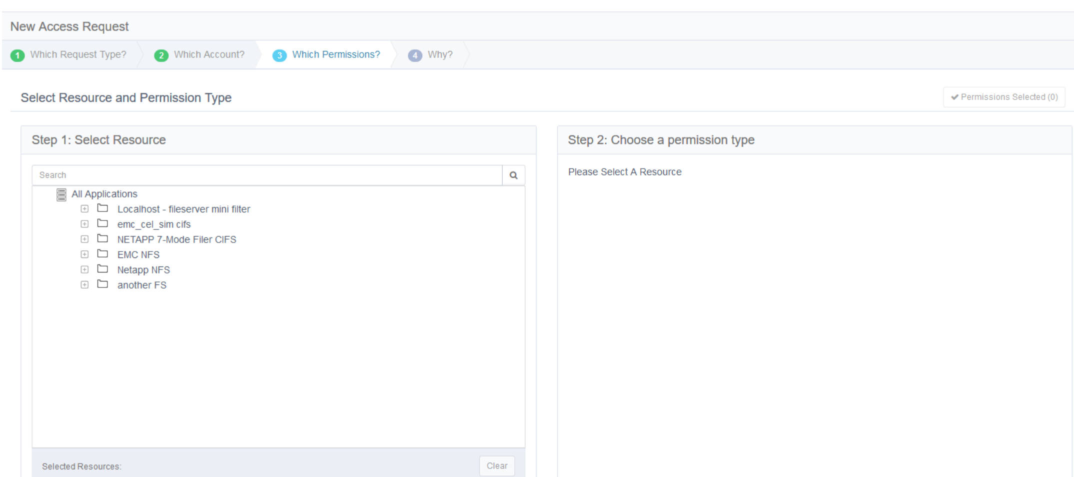
(white letters on a green background) to indicate that this access requested is now selected.



2. Follow Steps 2-5 in Administrative Groups .

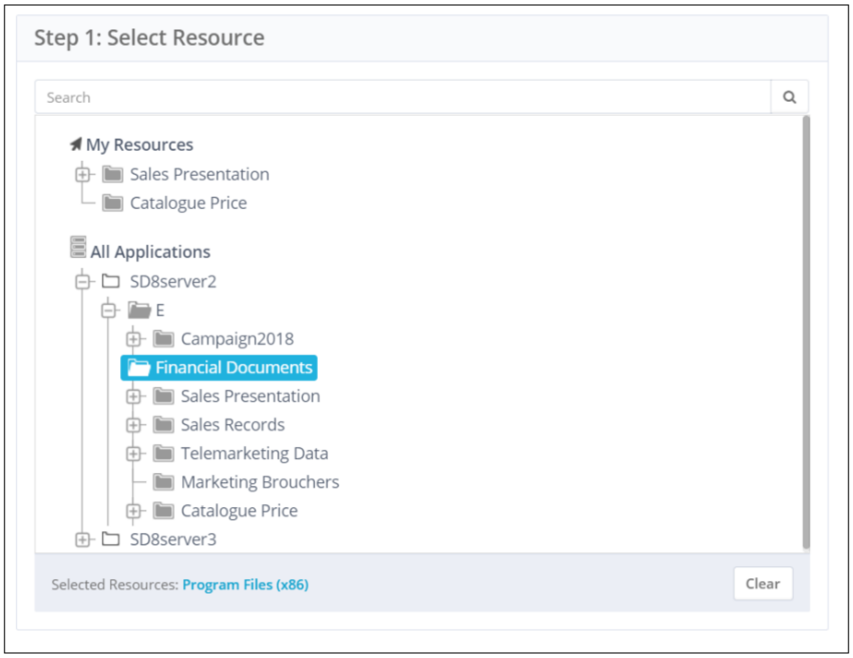
> If there is only one account, the wizard will skip the Which Account? step, and will display the Which Permissions? step.

3. Click **Next**.
The **Which Permissions?** window displays.

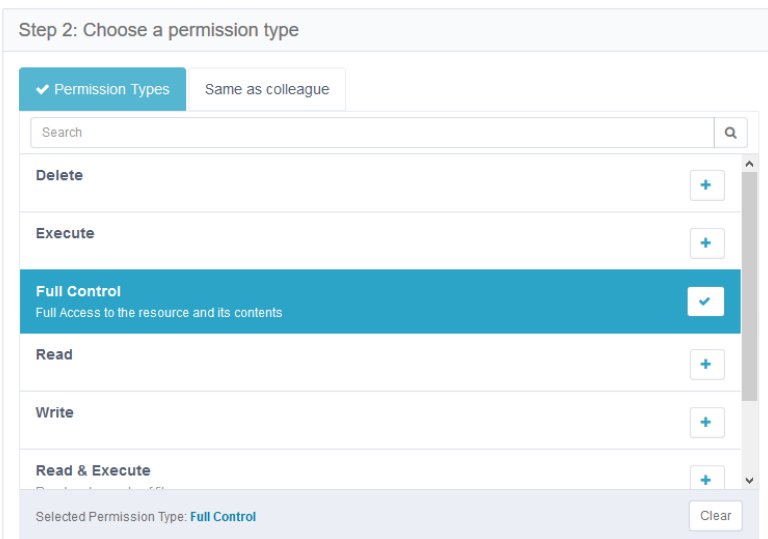


4. From **Step 1: Select Resource**, select a resource or type the name of the resource in the search box above the list of resources.

> Click **Clear** at the bottom right of the Step 1 window to clear the selection and select another resource.

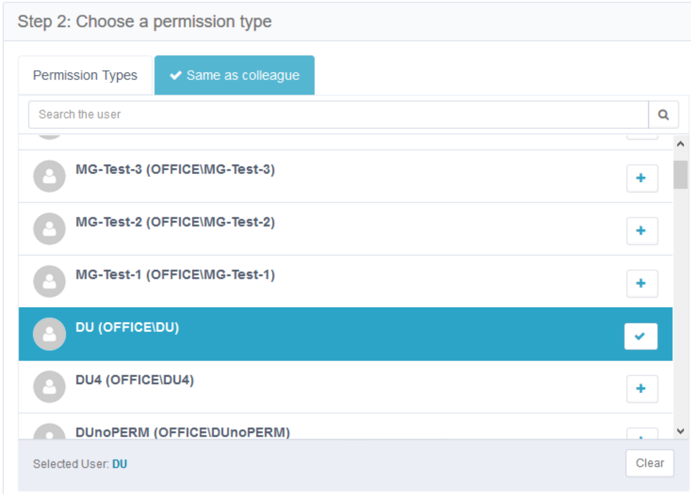


5. From **Step 2: Choose a permission type**, select a permission type or select the same permissions as those of a colleague (another user).
6. If you select **Permission Types**, select one of the available types.



7. If you click **Same as colleague**, either select one of the users (only if that user has relevant permissions) in the list or type the name of a user in the search box above the list of users.

> Click **Clear** at the bottom right of the Step 2 window to clear the selection and select another user.

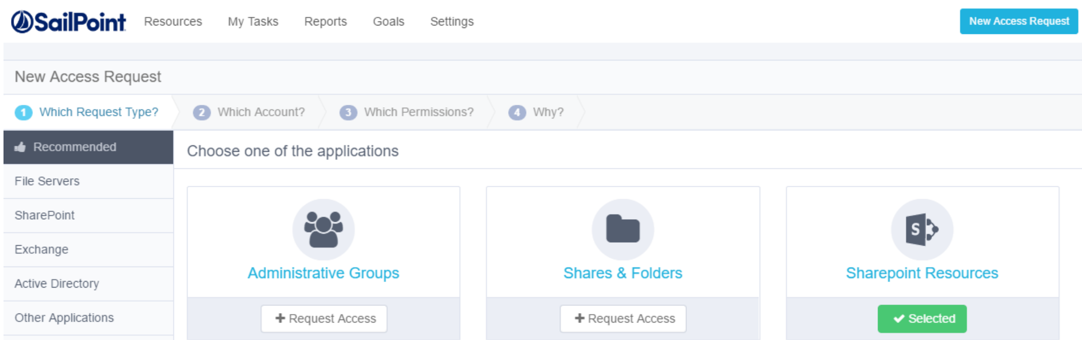


At the bottom right of each screen, click:
Cancel to cancel all your selections on this screen, or
Previous, to return to the previous screen or
Click one of the path milestones at the top of the screen, immediately under “New Access Request”, or
Add Another Permission to add an additional permission, or
Next to proceed to the next screen

1. Follow Steps 8-13 in Administrative Groups .

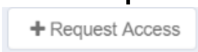
SharePoint Resources

1. Click **+Request Access** under **SharePoint Resources**. The button changes from + Request Access (gray letters on a white background) to ✔ Selected (white letters on a green background) to indicate that this access requested is now selected.



2. Follow Steps 2-8 in Shares & Folders.

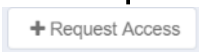
File Servers Tab

1. Click **+Request Access** under one of the displayed file server applications. The button changes from 

(gray letters on a white background) to 

(white letters on a green background) to indicate that this access requested is now selected.
2. Follow Steps 2-8 in Shares & Folders.

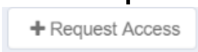
SharePoint Tab

1. Click **+Request Access** under one of the displayed SharePoint applications. The button changes from 

(gray letters on a white background) to 

(white letters on a green background) to indicate that this access requested is now selected.
2. Follow Steps 2-8 in Shares & Folders .

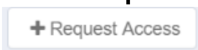
Exchange Tab

1. Click **+Request Access** under one of the displayed SharePoint applications. The button changes from 

(gray letters on a white background) to 

(white letters on a green background) to indicate that this access requested is now selected.
2. Follow Steps 2-8 in Shares & Folders .

Active Directory Tab

1. Click **+Request Access** under one of the displayed SharePoint applications. The button changes from 

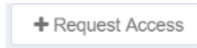
(gray letters on a white background) to 

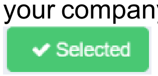
(white letters on a green background) to indicate that this access requested is now selected.

2. Follow Steps 2-8 in Shares & Folders.

> Regarding Step 6, select one of the following permission types:
> CreateChild, DeleteChild, ListChildren, ReadProperty, WriteProperty, DeleteTree, ListObject, Delete, ReadControl, WriteDacl, and WriteOwner.

Other Applications Tab

1. Click **+Request Access** under one of the other applications (which depends on the applications available in your company). The button changes from 

(gray letters on a white background) to 

(white letters on a green background) to indicate that this access requested is now selected.
2. Follow Steps 2-8 in Shares & Folders.

> Regarding Step 6, select one of the available permission types, which vary, depending upon the application selected.

Viewing My Requests

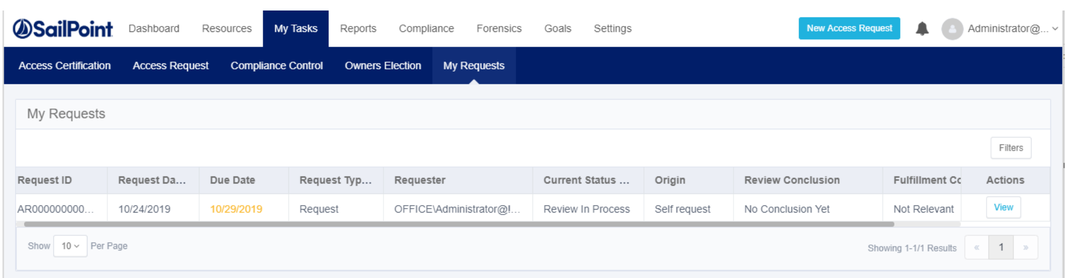
My Requests displays a list of requests pending review. A user can filter the list based on …

To filter My Requests tasks displayed by default, perform the following steps:

1. Click the My Requests tab.
2. Select one of the options from the Request Type dropdown menu.
3. Select one of the options from the Status dropdown menu.
4. Select one of the options from the Review Conclusion dropdown menu.
5. Select one of the options from the Fulfillment Conclusion dropdown menu.
6. Select one of the options from the Request Date dropdown menu.
   If you select “Define Range …”, a two-month calendar view displays, as shown inViewing Access Certifications.
   - Select a start date.
   - Select an end date.
7. The selected date range displays in the Due Date dropdown box.
8. Click the **Reset** button below the dropdown menus, on the far right of the screen, to reset all the filters.

> After you have selected the Applications, Status, and Due Date filters, the word “Filters” in the Filters button changes from gray lettering on a white background to white lettering on a green background.

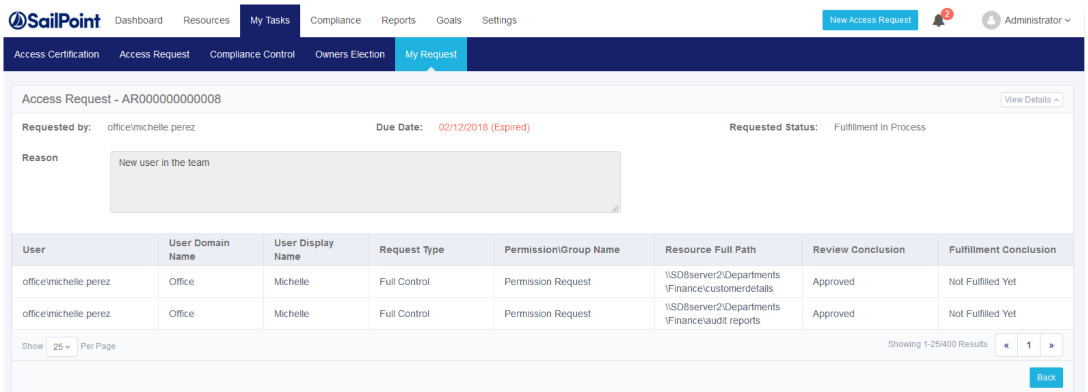
9. The filtered My Requests tasks display in a table below the dropdown menus.



My Requests Task Details

To view request details for a selected task, perform the following steps:

1. Click **View** under the Actions column of the task to be viewed.
2. The “My Requests” view screen displays.



My Requests ViewThe first line contains the name of the access request (granting or revoking a request or a group of requests) on the left, and a View Details button on the right.

1. Click **View Details** to view the details of the access request.

The second line lists the following information from left to right:

- Requested by – The user requesting the access request
- Due Date – The date the request was initiated
- Current Status – The status of the request, for example, “Review in Process”

The third line lists the reason(s) for the request.

The details of the request are in a table under the third line, with the following columns:

- User
- User Domain Name
- User Display Name
- Request Type
- Permission/Group Name
- Resource Full Path
- Review Conclusion
- Fulfillment Conclusion

> The following entities may view an access request:
> The user who submitted the request
> The user for whom access was requested.