



File Access Manager

Goals

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Goals Introduction

Currently, the only goal available is the Data Owner's Election. Data Owners are responsible for protecting the data within a specific resource. Administrators use the Goals process so that those who are the most knowledgeable regarding the use of a specific resource can elect (via a crowd sourcing process) the most suitable data owners for a specific resource.

The right to view the Goals tab is assigned by default only to the administrator capability.

A *running goal* refers to each determination of a data owner of a resource in a crowd sourcing process, while a *goal* refers to a collection of all the determinations of data owners of resources in a crowd sourcing process. Therefore, a *goal* is a collection of *activities*.

For example, if the goal is to determine the identity of the data owners for five business resources in a file server application, that goal consists of five running goals – one for each resource.

The goal lifecycle stages are:

Goal creation

First, an administrator creates goal activities, specifying the goal type, application, scope, and settings.

Goal is Pending for Execution

After goal creation, but before the system sends emails to participants, an administrator checks the goal status, including the goal participants selected, and the data owner candidates selected, to validate successful goal creation.

Election

After goal execution, participants (who were decided upon in the creation process) vote for data owners.

Appointment

Reviewers review the selected data owners (unless the administrator chooses the automatic selection of data owners).

Completed

A goal is completed when all the goal activities have been completed (for example, all data owners have been assigned).

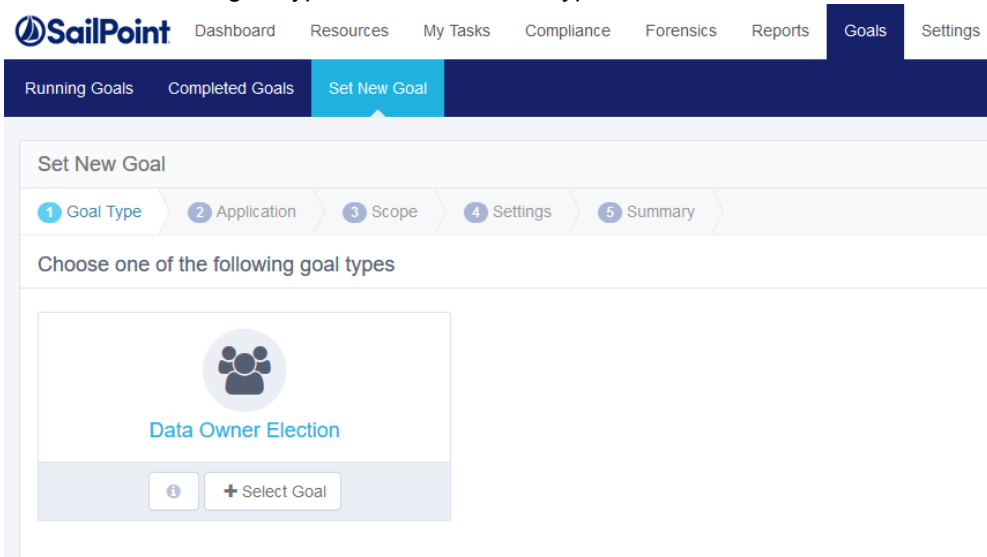
Creating Goals

The Set New Goal process consists of the following steps:

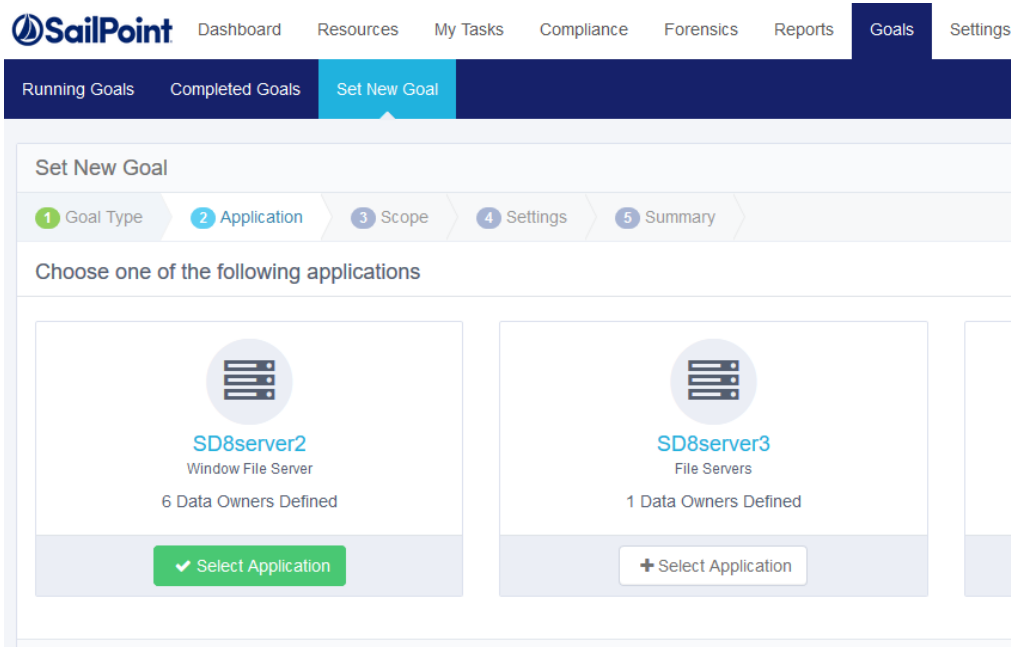
- Goal Type
- Application
- Scope
- Settings
- Summary

To set a new goal:

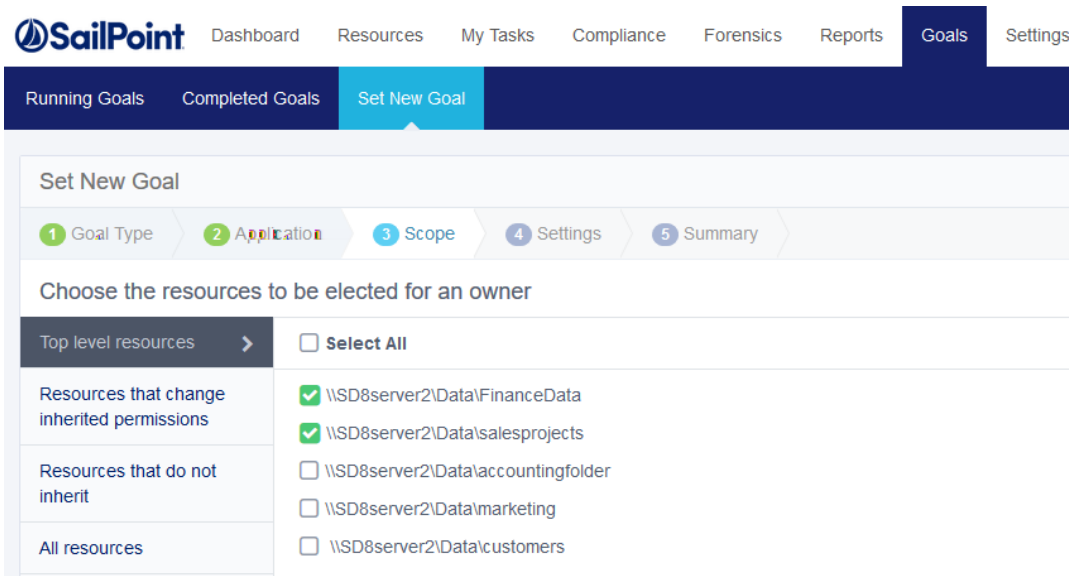
1. Navigate to **Goals > Set New Goal**.
2. Select the relevant goal type from the available types.



3. Click **Next** to select the Application .



4. Select one of the applications displayed. The resources for this goal will be from the selected application.
5. Click **Next** to set the scope.



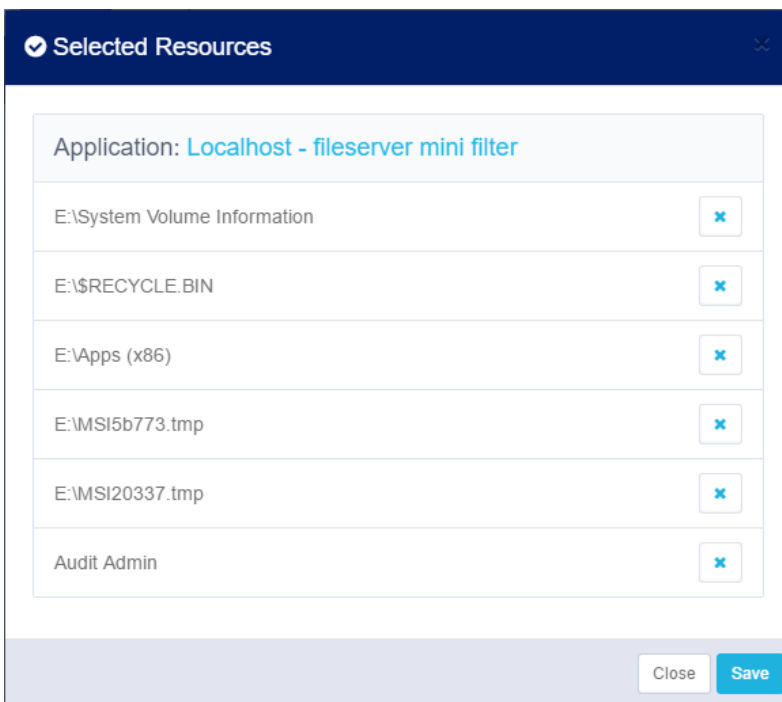
6. Select resources (one or more) from any of the categories, including:
 - Top level resources – Resources for a specific application from the top level of the resource tree
 - Resources that change inherited permissions – Resources that inherit permissions, with permissions added to those inherited permissions

- Resources that do not inherit – Resources that break an inheritance
 - All resources – Resources from the entire resource tree
7. Check the check box next one or more resources to select that resource, then click **Add** under the resource list to add the resource as a new activity in the current goal.

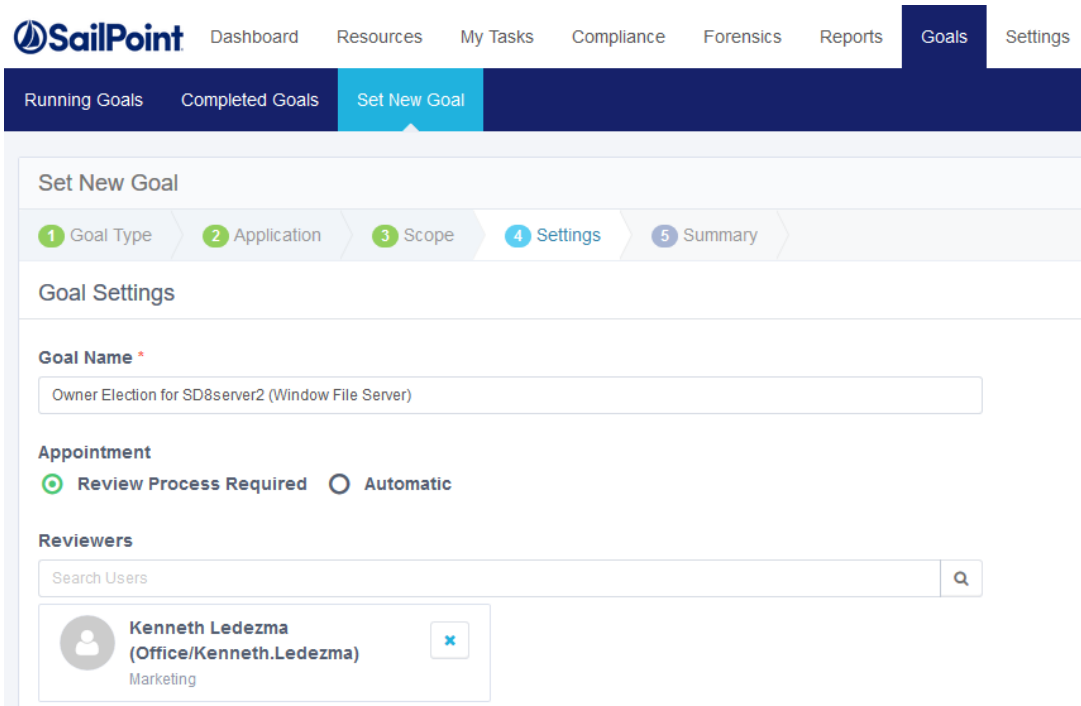
Check the **Select All** check box to select all the resources listed under each category.

The number of resources selected displays in parentheses in “Resources Added”, and the added resources are unchecked in the original resource list.

8. Click **Resources Added** to display a list of Selected Resources.
9. Click the blue **X** to the right of any selected resource in the list of resources to deselect that resource.
10. Click **Save** to save the revised selection of resources.



11. Click **Next** to open the Settings screen.



12. In the **Goal Name** text box, type an appropriate name for the goal.

13. There are two methods of finalizing data owners:

Review Process Required

A reviewer has to either approve or reject the selected data owners who were voted for, before their final appointment.

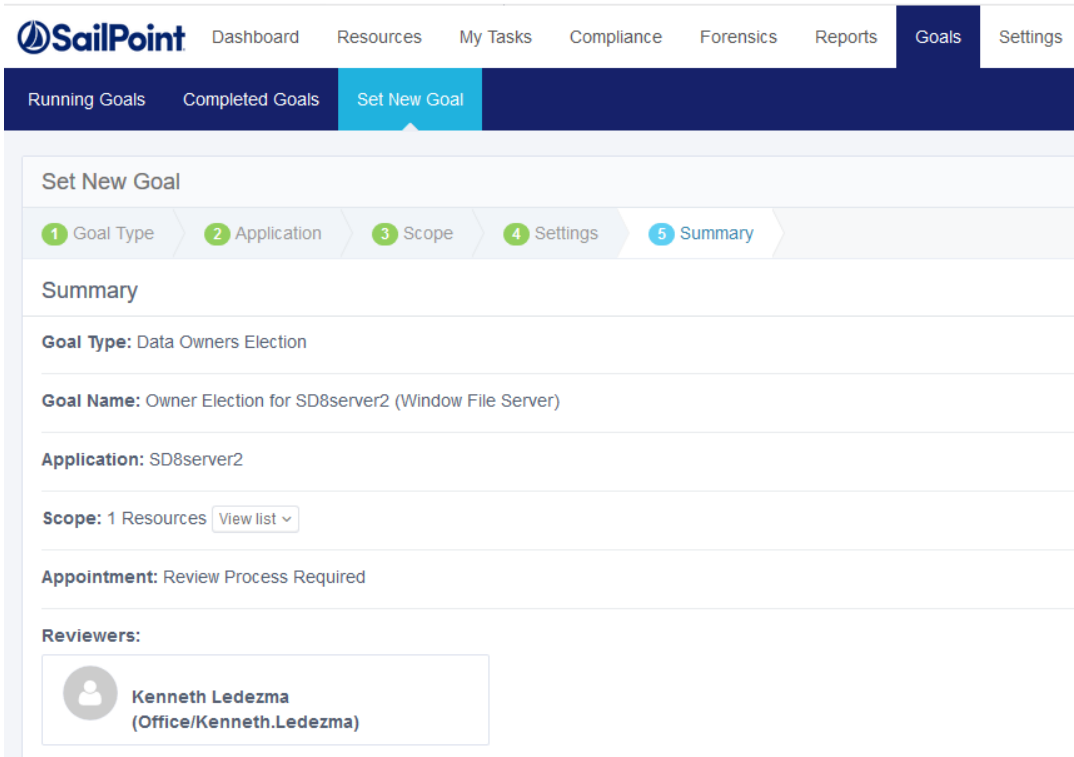
Automatic

Appoint selected data owners without a review based on the votes of the participants

14. If you select “Review Process Required”:

- a. Select a reviewer by starting to type in the **Reviewers** text box.
- b. Select the **blue x** to the right of any selected reviewer in the reviewer list to deselect a reviewer.

15. Click **Next** to open the Summary screen.



The goal **Summary** screen lists the following information:

Goal Type

The goal type, for example, Data Owners Election

Goal Name

The name selected for the goal

Application

The application for which a data owner is to be selected

Scope

Number of resources

Appointment Method

Either “Review Process Required” or “Automatic”

Reviewers

Names of reviewers if the appointment method is “Review Process Required”

Click “View List” in Scope to view the selected resources.

16. Click **Create Goal** at the bottom right of the *Summary* screen.

17. A Success dialog displays, indicating that the goal was created successfully, and requesting that you execute the goal in "Running Goals".
18. Click **OK**.

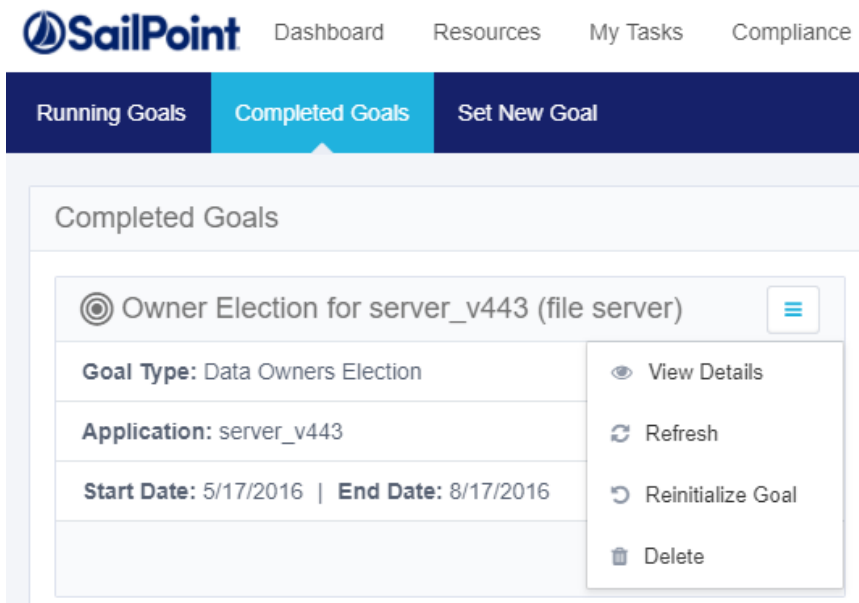
Completed Goals

A completed goal is a goal to which an owner has been assigned to the goal resource.

The Completed Goals tab displays a summary of the completed goals displays, including the following information:

- Goal Type
- Application
- Start Date
- End Date
- Percentage of Goal Completed

Click the menu button on the right top of the Completed Goals window to display a dropdown menu of status activities.



The Completed Goals status actions include:

View Details

Displays all the goal details.

Refresh

Updates the screen display.

Reinitialize Goal

Starts the goal creation process from the beginning. The status will be “Ready for Execution” and the system will delete all votes. This action cannot be undone.

When you click Reinitialize, a Question dialog displays, asking if you are sure you want to reinitialize the goal, and reminding you that proceeding will result in the permanent loss of all the data for that goal. Click Yes to reinitialize, or No to return to the Running Goals screen.

Completed Goals

Delete

Deletes the goal. This action cannot be undone.

When you click Delete, a Question dialog displays, asking if you are sure you want to delete the goal. Click Yes to delete, or No to return to the Running Goals screen.

Show Status

Click **Show Status** at the bottom right of the Completed Goals box.

The screenshot displays the 'Data Owners Election' goal in the SailPoint interface. The goal is titled 'Owner Election for server_v423 (file server)' and is marked as 'Completed' with a goal achievement of 25%. The 'Current Results' section shows two candidates: Juan Peterson (78% Votes) and Tyler Garza (56% Votes). A 'Runners up' section lists three other candidates: James Petter (40% Votes), Johnson Smith (20% Votes), and Amanda Conlan (15% Votes). The interface includes a navigation bar with 'Goals' selected, a search bar, and a 'Set New Goal' button.

The screenshot displays the 'Data Owners Election' goal in the SailPoint interface. The goal is titled 'Owner Election for server_v423 (file server)' and is marked as 'Completed' with a goal achievement of 25%. The 'Final Participants' section shows two candidates: Juan Peterson (Review Pending) and Tyler Garza (Review Pending). The 'Reviewers' section shows one reviewer: Kenneth Ledezma (Review Pending). The interface includes a navigation bar with 'Goals' selected, a search bar, and a 'Set New Goal' button.

There are two final candidates pending the review of one reviewer. After a user (for whom a review process was required) has voted, the system will add a review task to the reviewer's task list.

One user can be both a final candidate and a reviewer.

If a goal is ready for execution, you can view the status of that goal before executing it, by clicking the **Show Status** button (to the right of the "Execute Now" button at the bottom right of each goal marked "Ready for Execution".)

If goal creation is in progress, the Execute Now and Show Status buttons are not available. The only available button is Refresh.

To view status details for a newly created goal:

Completed Goals

Click **Show Status**. The Data Owners Election displays.

Resources Tab

The screenshot displays the 'Data Owners Election' interface. At the top, it shows 'Goalname' and 'Application: V42server2 | Start Date: 5/17/2016 | End Date: 8/17/2016 | Goal Achieved: 25%'. The 'Resources' section on the left lists four items: 'C:\\$Recycle.Bin' (In Election), 'C:\inetpub' (Finished), 'C:\PerfLogs' (In Election), and a search bar. The 'Election (Finished)' tab is active, showing 'Current Results (2 out of 5 participants voted)'. The results are as follows:

Rank	Name (office)	Department	Votes
1st Place	Juan Peterson (office\juN)	Development	78% Votes
2nd Place	Tyler Garza (office\Tyler)	Development	56% Votes
Runners up	James Petter (office\james)	Development	40% Votes
3rd	Johnson Smith (office\johnson)	Development	20% Votes
4th	Amanda Conlan (office\amanda)	Development	15% Votes
5th			

The Resources section of the Show Status screen displays how many of the total activities (resources) for the displayed goal have been finished.

In the Status dropdown menu under Resources, the following options are available:

All

Displays all the resources in this goal

Election

Displays activities in the Election state (pending completion of voting)

Appointment

Displays resources in the Appointment state (pending review)

Finished

Displays all the resources for which the Election and Appointment processes have been completed.

Completed Goals

Resources (1 out of 4 Finished)

Appointment ▾

Search

C:\\$Recycle.Bin
In Election

C:\inetpub
Finished

C:\PerfLogs
In Election

« 1 2 3 »

The bottom right of the Resources section 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).

The Election Tab

The Election section of the Show Status screen displays the “Current Results”, which is the number of participants (out of the total number of participants) who have voted. Up to five data owner candidates may be displayed, with their names, place, and percentage of votes received. However, the first and second place data owner candidates are given prominence.

Election (Finished) Appointment (In Process)

Current Results (2 out of 5 participants voted) All Participants End Election Process

First Place

Juan Peterson (office\juN)
Development
78% Votes

Second Place

Tyler Garza (office\Tyler)
Development
56% Votes

Runners up

3rd James Petter (office\james)
Development | 40% Votes

4th Johnson Smith (office\johnson)
Development | 20% Votes

5th Amanda Conlan (office\amanda)
Development | 15% Votes

Click **All Participants** at the top right of the Election Participants section.

A summary of the election participants displays.

The viewing options are:

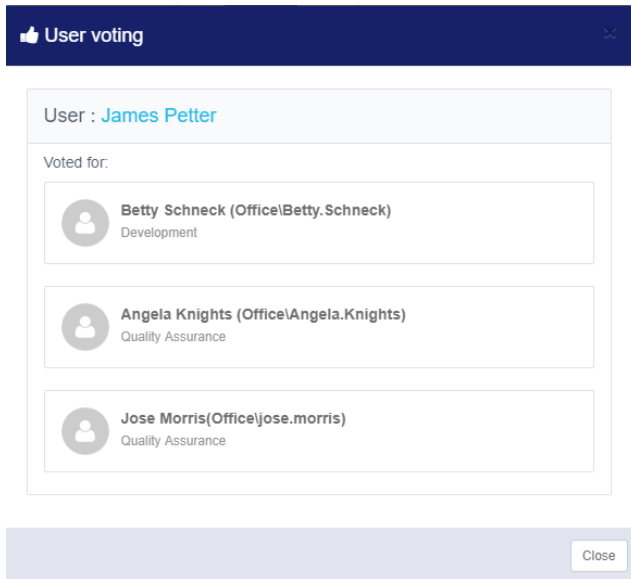
- All Participants
- Voted – The number of all participants who have already voted.
- Pending – The number of all participants whose vote is still pending.

Completed Goals

Navigation in the All Participants view of Election section of the Show Status screen is the same as in the Resources section of the Show Status screen.

The screenshot displays the SailPoint interface for a 'Data Owners Election' goal. The top navigation bar includes 'SailPoint', 'Dashboard', 'Resources', 'My Tasks', 'Compliance', 'Forensics', 'Reports', 'Goals', and 'Settings'. The 'Goals' section is active, showing 'Completed Goals' and 'Set New Goal' options. The goal summary indicates 'Application: V42server 2 | Start Date: 5/17/2016 | End Date: 8/17/2016 | Goal Achieved: 25%'. The goal name is 'Data Owners Election'. The goal progress is shown as 'Reminder was sent to the participant.', 'Aviad Chen (office/aviad) votes were reverted back.', and 'The election process has been ended.'. The 'Resources' section shows '1 out of 4 Finished' resources: 'C:\\$Recycle.Bin' (In Election), 'C:\inetpub' (Finished), 'C:\PerfLogs' (In Election), and 'C:\PerfLogs' (In Election). The 'Election Participants' section shows '2 out of 5 participants voted'. The participants are: 'Juan Peterson (office/juanpeterson)' (Voted), 'James Petter (office/tylergarza)' (Voted), and 'Amanda Conlan (office/amandaconlan)' (Pending). The 'Appointment (In Process)' section shows 'Final Participants': 'Juan Peterson (office/juanpeterson)' (Rejected by Kenneth Ledezma on 8/11/2016) and 'Tyler Garza (office/tylergarza)' (Approved by Kenneth Ledezma on 8/11/2016). The 'Reviewers' section shows 'Kenneth Ledezma (office/Kenneth)' (Review Completed).

- Click **Remind** next to a user who has not yet voted to remind that user to vote.
- Click **Votes** next to a user who has voted to see a list of the people for whom that user voted.



- Click **See Summary** in the top right of the Election section to return to the Summary view.
- Click **End Election Process** in the top right of the Election section to end the election process even if it does not include 100% of the votes.

A Question dialog displays, asking whether you want to end the election process.

Click **Yes** to end the election process or **No** to return to the previous screen.

Running Goals

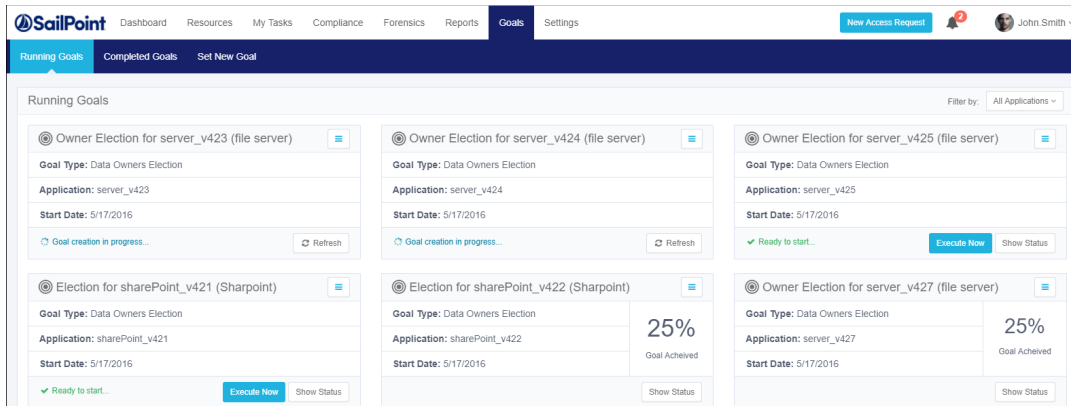
A running goal is a goal in process, in which no owner has yet been assigned to the goal resource. Any number of running goals may be displayed at any given time.

Administrators can manage goals more efficiently by viewing the status of the goals before executing them.

To view goal status details, perform the following steps:

1. Web Client Navigate to **Goals > Running Goals**.

The Running Goals screen displays.



Important general notifications display immediately under the “Running Goals” title. Examples of notifications include any goals that have been deleted or that have been reinitialized and are ready to start.

All goals display:

- Goal Type
- Application
- Start Date

If a goal is being created, “Goal creation in progress...” displays in blue at the bottom left of the goal display.

2. Click **Refresh** in any goal being created to refresh the goal creation progress status.

If a goal has been created, and is ready to start, “Ready to start...” displays in green at the bottom left of the goal display.

3. Click **Execute Now** to start the goal

Execution of the goal begins.

4. Click **Show Status** to show the goal status.

If a goal has already been started, the percentage of the goal achieved displays.

5. Click **Show Status** to show the goal status.

Running Goals

Whether you click Goal Status in a goal that is ready to start (or in a goal that has already started) the status of the running goals displays, based on one of the following filtered statuses (the default being “All”):

- All – Displays all the resources in this goal
- Election – Displays resources in the Election state (pending completion of voting)
- Appointment – Displays resources in the Appointment state (pending review)
- Finished – Displays all the resources for which the Election and Appointment processes have been completed.

The screenshot shows the SailPoint interface for a 'Data Owners Election' goal. The navigation bar includes 'Goals' and 'Settings'. The main content area displays the election details for 'server_v423 (file server)'. On the left, there is a 'Resources' list with a dropdown menu for 'Appointment' showing options: 'All', 'Election', 'Appointment', and 'Finished'. The 'Election (Finished)' tab is active, showing 'Current Results (2 out of 3 participants voted)'. The results are displayed in a grid format:

Rank	Name (office)	Department	Votes
1st	Juan Peterson (office juN)	Development	78% Votes
2nd	Tyler Garza (office Tyler)	Development	56% Votes
3rd	James Petter (office james)	Development	40% Votes
4th	Johnson Smith (office johnson)	Development	20% Votes
5th	Amanda Conlan (office amanda)	Development	15% Votes

If no candidates were selected as data owners for a given resource, the message “There were no eligible candidates for the selected resource” displays to the right of the list of resource statuses.

6. Click the menu button on the right top of the Running Goals window to display a dropdown menu of status activities.



Running Goals

Completed Goals

Set New Goal

Running Goals

🎯 Owner Election for server_v423 (file server)



Goal Type: Data Owners Election

👁 View Details

Application: server_v423

🔄 Refresh

Start Date: 5/17/2016

🔄 Reinitialize Goal

🔄 Goal creation in progress...

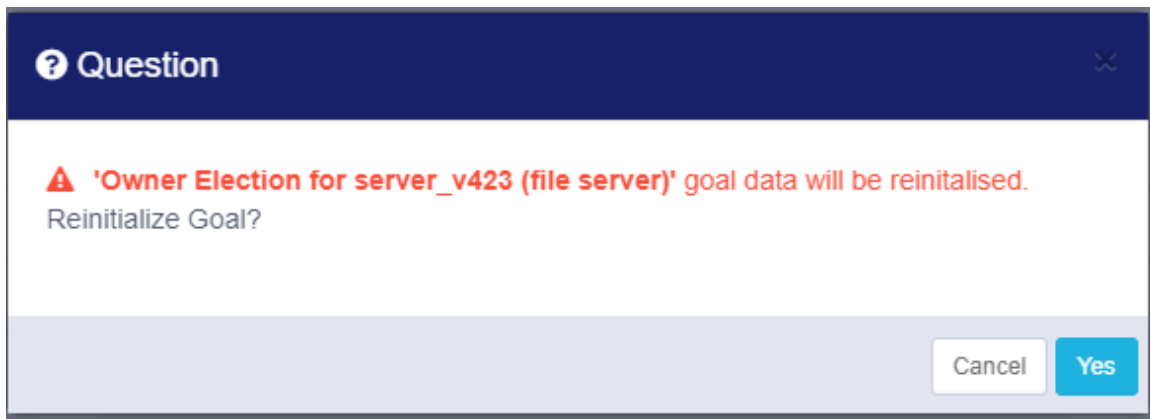
🗑 Delete

Goal Status and Details

The following are listed in the dropdown as Goal activities:

- View Details – Displays all goal details
- Refresh – Updates goal status
- Reinitialize – Starts the goal creation process from the beginning. The status will be “Ready for Execution” and the system will delete all votes. This action cannot be undone.
- Delete – Deletes the goal

When you click Reinitialize, a Question dialog displays, asking if you are sure you want to reinitialize the goal. Click Yes to reinitialize, or No to return to the Running Goals screen.



- Delete – Deletes the goal. This action cannot be undone.

When you click Delete, a Question dialog displays, asking you to confirm deletion of the goal. Click Yes to delete, or No to return to the Running Goals screen.

Goal Details ✕

Goal Name: [Owner Election for server_v423 \(file server\)](#)

Goal Type: Data Owners Election


Goal Type: Data Owners Election

Application: server_v423

Scope: 1 Resources View list

Appointment: Review Process Required

Reviewers:

 **Kenneth Ledezma**
(office\Kenneth)

Close