



# File Access Manager Goals

Version: 8.4

Revised: March 27, 2023

---

## Copyright and Trademark Notices

### Copyright © 2023 SailPoint Technologies, Inc. All Rights Reserved.

All logos, text, content, including underlying HTML code, designs, and graphics used and/or depicted on these written materials or in this Internet website are protected under United States and international copyright and trademark laws and treaties, and may not be used or reproduced without the prior express written permission of SailPoint Technologies, Inc.

"SailPoint," "SailPoint & Design," "SailPoint Technologies & Design," "Identity Cube," "Identity IQ," "IdentityAI," "IdentityNow," "SailPoint Predictive Identity" and "SecurityIQ" are registered trademarks of SailPoint Technologies, Inc. None of the foregoing marks may be used without the prior express written permission of SailPoint Technologies, Inc. All other trademarks shown herein are owned by the respective companies or persons indicated.

SailPoint Technologies, Inc. makes no warranty of any kind with regard to this manual or the information included therein, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. SailPoint Technologies shall not be liable for errors contained herein or direct, indirect, special, incidental or consequential damages in connection with the furnishing, performance, or use of this material.

Patents Notice. <https://www.sailpoint.com/patents>

Restricted Rights Legend. All rights are reserved. No part of this document may be published, distributed, reproduced, publicly displayed, used to create derivative works, or translated to another language, without the prior written consent of SailPoint Technologies. The information contained in this document is subject to change without notice.

Use, duplication or disclosure by the U.S. Government is subject to restrictions as set forth in subparagraph (c) (1) (ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 for DOD agencies, and subparagraphs (c)(1) and (c)(2) of the Commercial Computer Software Restricted Rights clause at FAR 52.227-19 for other agencies.

Regulatory/Export Compliance. The export and re-export of this software is controlled for export purposes by the U.S. Government. By accepting this software and/or documentation, licensee agrees to comply with all U.S. and foreign export laws and regulations as they relate to software and related documentation. Licensee will not export or re-export outside the United States software or documentation, whether directly or indirectly, to any Prohibited Party and will not cause, approve or otherwise intentionally facilitate others in so doing. A Prohibited Party includes: a party in a U.S. embargoed country or country the United States has named as a supporter of international terrorism; a party involved in proliferation; a party identified by the U.S. Government as a Denied Party; a party named on the U.S. Department of Commerce's Entity List in Supplement No. 4 to 15 C.F.R. § 744; a party prohibited from participation in export or re-export transactions by a U.S. Government General Order; a party listed by the U.S. Government's Office of Foreign Assets Control as ineligible to participate in transactions subject to U.S. jurisdiction; or any party that licensee knows or has reason to know has violated or plans to violate U.S. or foreign export laws or regulations. Licensee shall ensure that each of its software users complies with U.S. and foreign export laws and regulations as they relate to software and related documentation.

---

# Contents

---

- Goals Introduction** ..... 1
- Creating Goals** ..... 2
- Completed Goals** ..... 8
- Running Goals** ..... 14
  - Goal Status and Details ..... 16

## 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.

Note: 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).

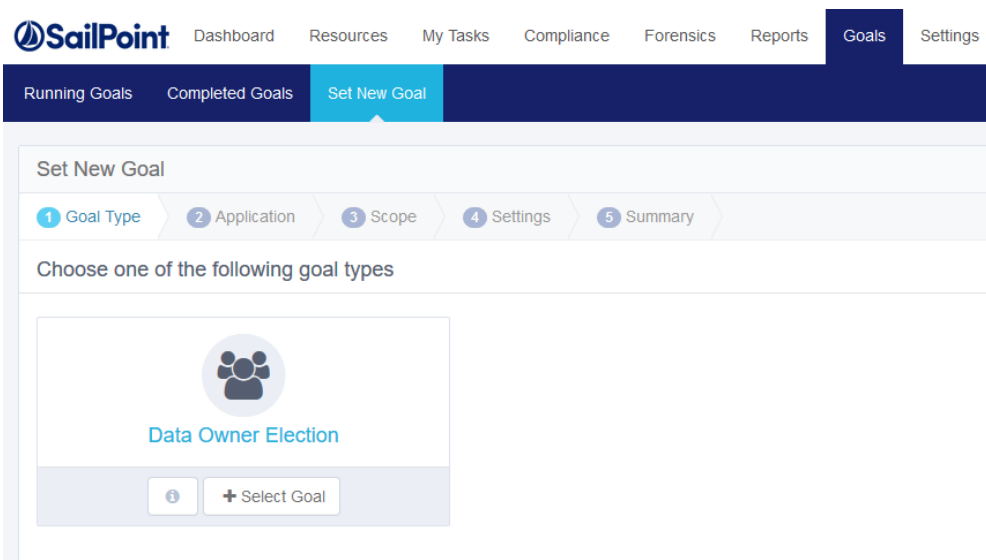
# Creating Goals

The Set New Goal process consists of the following steps:

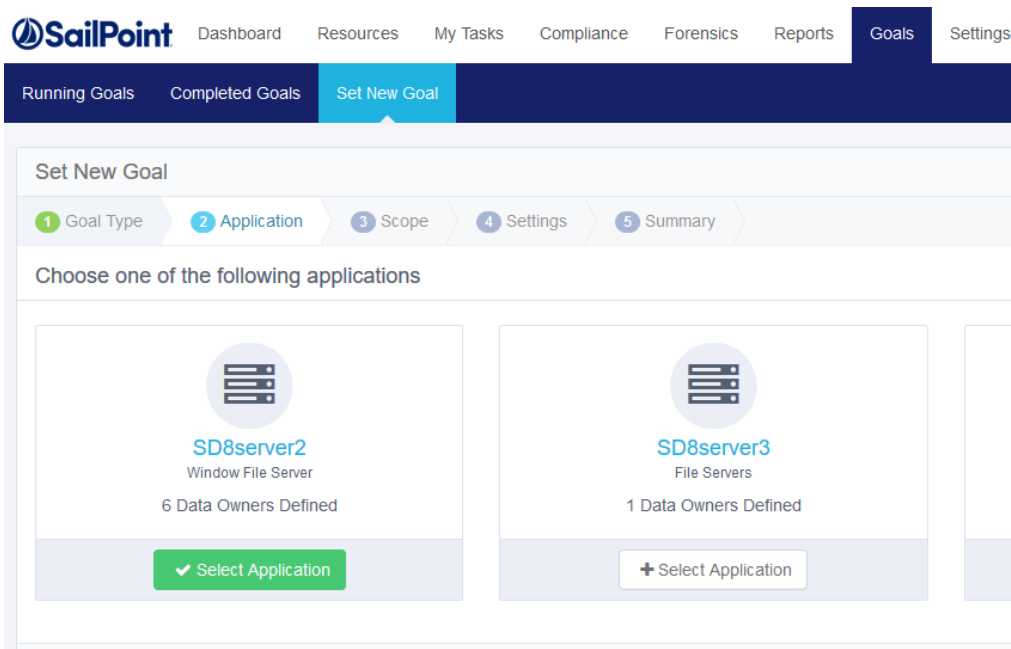
- Goal Type
- Application
- Scope
- Settings
- Summary

To set a new goal:

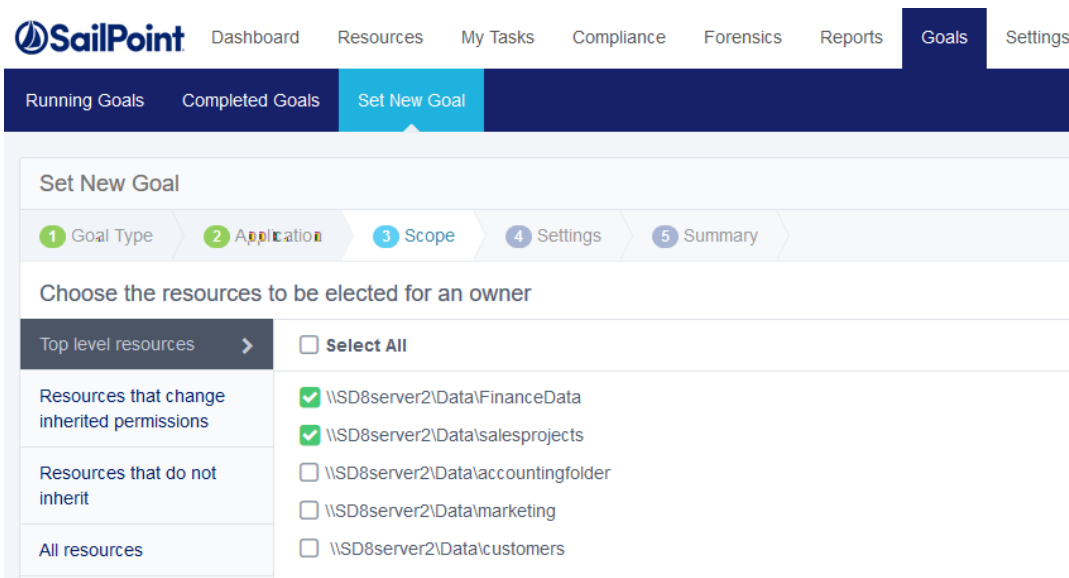
1. Navigate to **Goals > Set New Goal**.
2. Select the relevant goal type from the available types.



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

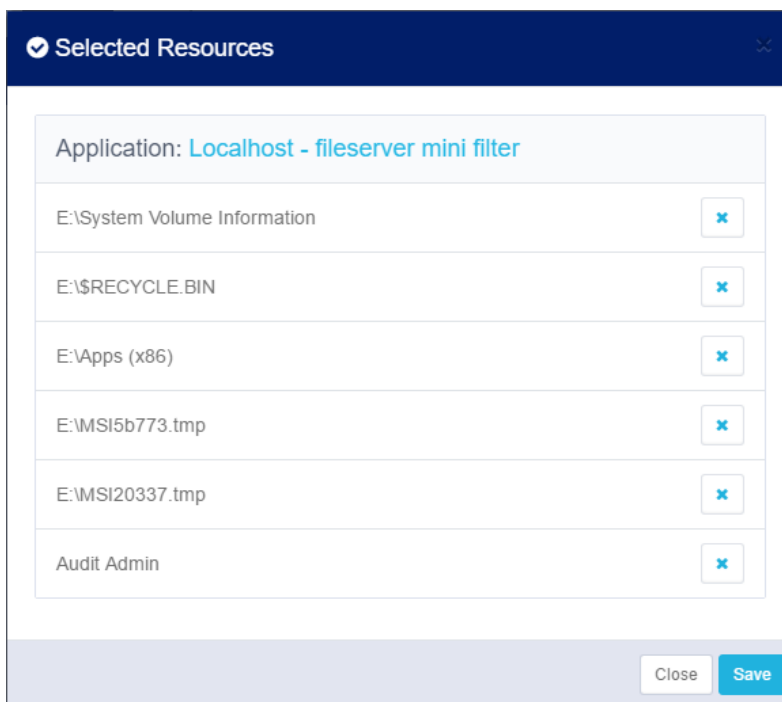


4. Select one of the applications displayed. The resources for this goal will be from the selected application.
5. Click **Next** to set the scope.



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***

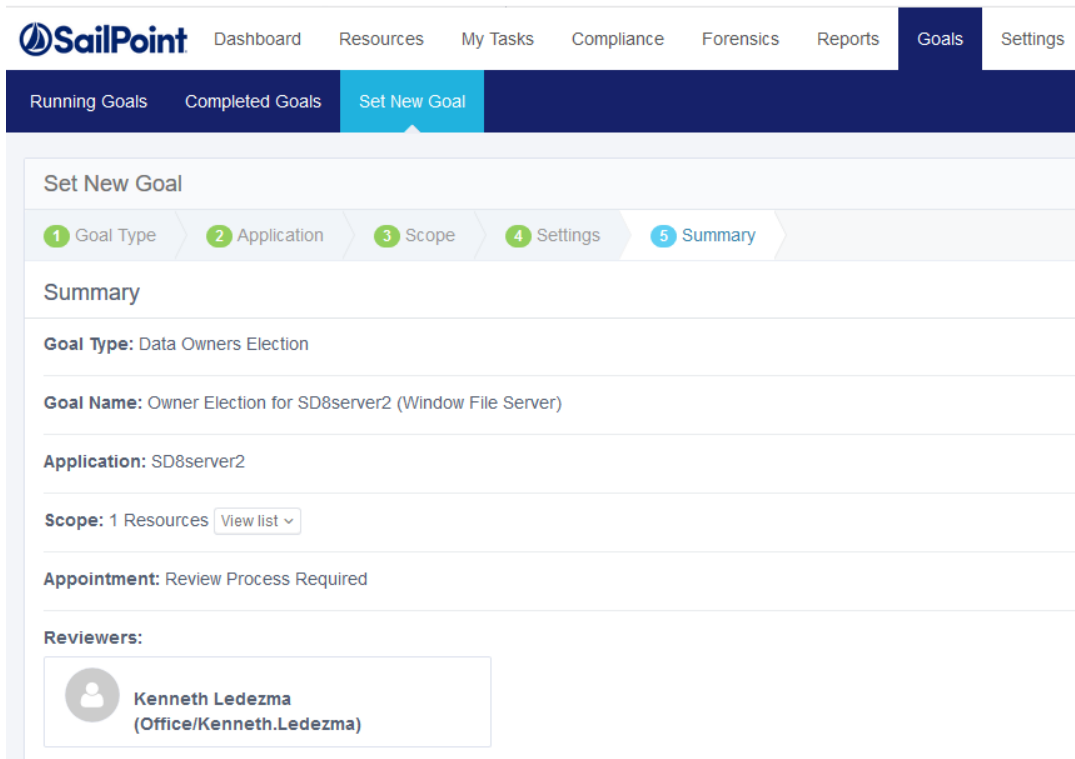
Appoint selected data owners without a review based on the votes of the participants

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 screenshot displays the 'Set New Goal' process in SailPoint. The top navigation bar includes 'Dashboard', 'Resources', 'My Tasks', 'Compliance', 'Forensics', 'Reports', 'Goals', and 'Settings'. Below this, a sub-navigation bar shows 'Running Goals', 'Completed Goals', and 'Set New Goal'. The main content area is titled 'Set New Goal' and features a progress indicator with five steps: 1. Goal Type, 2. Application, 3. Scope, 4. Settings, and 5. Summary. The 'Summary' section contains the following information:

- Goal Type:** Data Owners Election
- Goal Name:** Owner Election for SD8server2 (Window File Server)
- Application:** SD8server2
- Scope:** 1 Resources (with a 'View list' dropdown)
- Appointment:** Review Process Required
- Reviewers:** Kenneth Ledezma (Office/Kenneth.Ledezma)

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 screenshot shows the SailPoint user interface. At the top, there is a navigation bar with the SailPoint logo and links for Dashboard, Resources, My Tasks, and Compliance. Below this is a secondary navigation bar with three tabs: Running Goals, Completed Goals (which is active), and Set New Goal. The main content area is titled 'Completed Goals' and displays a list of goals. The first goal is 'Owner Election for server\_v443 (file server)'. To the right of this goal entry is a dropdown menu with four options: View Details, Refresh, Reinitialize Goal, and Delete.

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.

### 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' results for 'server\_v423'. The interface includes a navigation bar with 'SailPoint' and various menu items. The main content area has tabs for 'Election (Finished)' and 'Appointment (In Process)'. The 'Current Results' section shows the following data:

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

The screenshot displays the 'Data Owners Election' status for 'server\_v423'. The interface includes a navigation bar with 'SailPoint' and various menu items. The main content area has tabs for 'Election (Finished)' and 'Appointment (In Process)'. The 'Final Participants' section shows the following data:

Name (office)	Status
Juan Peterson (office juanpeterson)	Review Pending
Tyler Garza (office tylergarza)	Review Pending

The 'Reviewers' section shows the following data:

Name (office)	Status	Action
Kenneth Ledezma	Review Pending	Remind

## Completed Goals

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.

Note: 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.)

Note: 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:

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

## Resources Tab

The screenshot shows the 'Data Owners Election' goal status page. On the left, the 'Resources' section lists three items: 'C:\\$Recycle.Bin' (In Election), 'C:\inetpub' (Finished), and 'C:\PerfLogs' (In Election). The main content area is titled 'Current Results (2 out of 5 participants voted)' and features two tabs: 'Election (Finished)' and 'Appointment (In Process)'. Under the 'Election' tab, there are three columns: 'First Place' with Juan Peterson (Development) at 78% Votes, 'Second Place' with Tyler Garza (Development) at 56% Votes, and 'Runners up' with James Petter (Development) at 40% Votes, Johnson Smith (Development) at 20% Votes, and Amanda Conlan (Development) at 15% Votes. A search bar and pagination controls are visible at the bottom of the resources list.

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

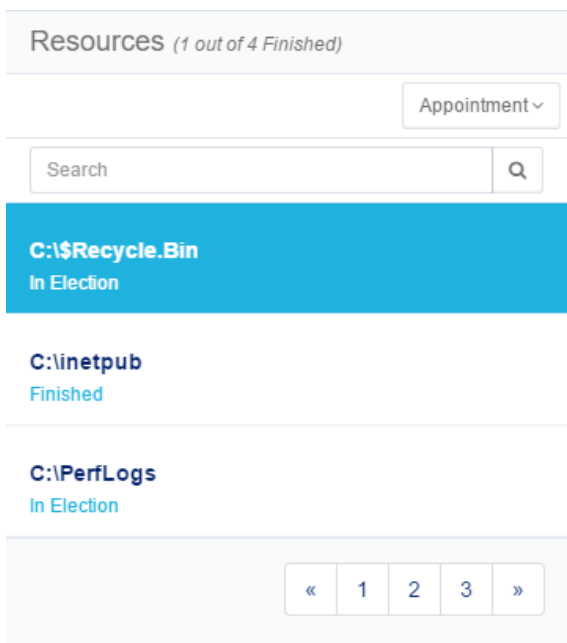
Displays activities in the Election state (pending completion of voting)

### Appointment

Displays resources in the Appointment state (pending review)

### Finished

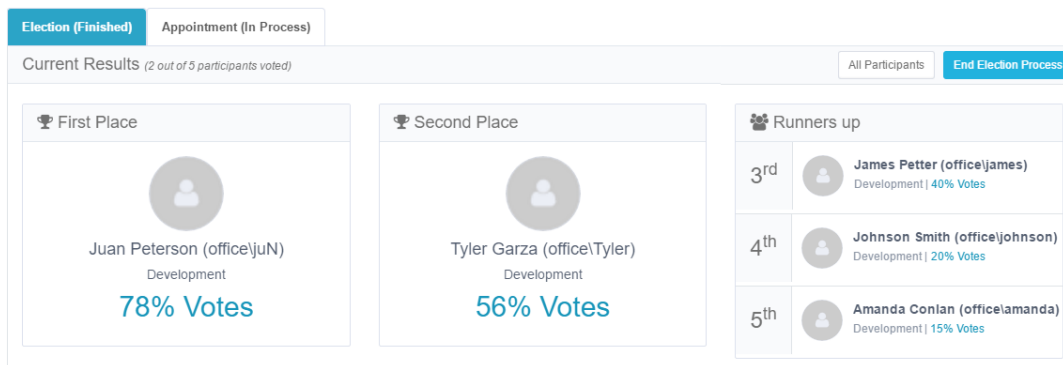
Displays all the resources for which the Election and Appointment processes have been completed.



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.



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

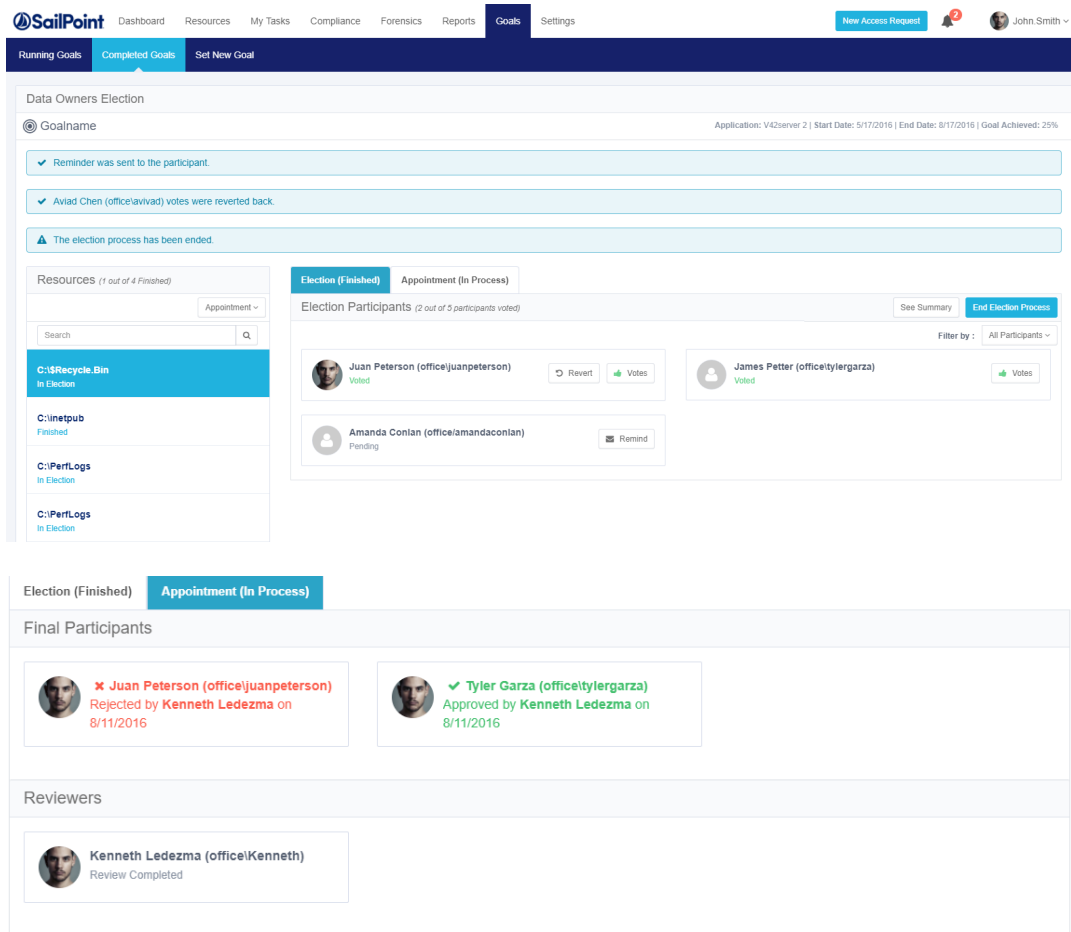
A summary of the election participants displays.

The viewing options are:

## Completed Goals

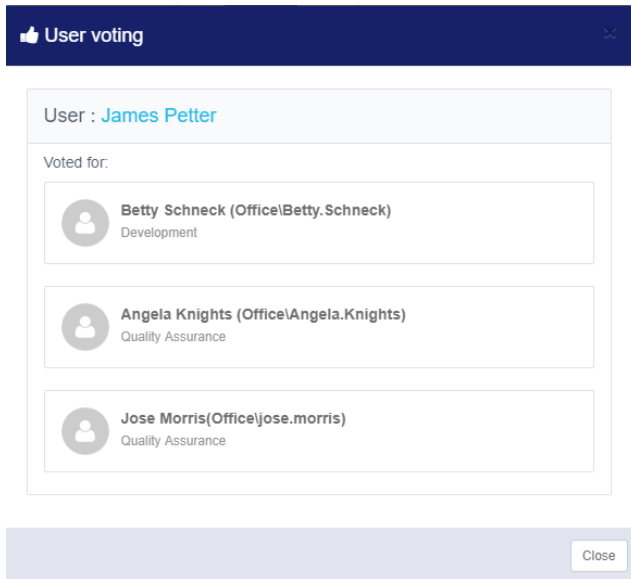
- All Participants
- Voted – The number of all participants who have already voted.
- Pending – The number of all participants whose vote is still pending.

Note: 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'. A 'New Access Request' button and user profile 'John Smith' are visible. The 'Completed Goals' section is active, showing a goal overview with status indicators: 'Reminder was sent to the participant', 'Aviad Chen (office\aviad) votes were reverted back', and 'The election process has been ended'. A 'Resources' list on the left shows items like 'C:\Recycle\_Bin' and 'C:\inetpub'. The main area features 'Election Participants' with tabs for 'Election (Finished)' and 'Appointment (In Process)'. Under 'Election (Finished)', participants are listed: Juan Peterson (Voted), James Petter (Voted), and Amanda Conlan (Pending). Below this, 'Final Participants' shows Juan Peterson (Rejected) and Tyler Garza (Approved). The 'Reviewers' section shows Kenneth Ledezma (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

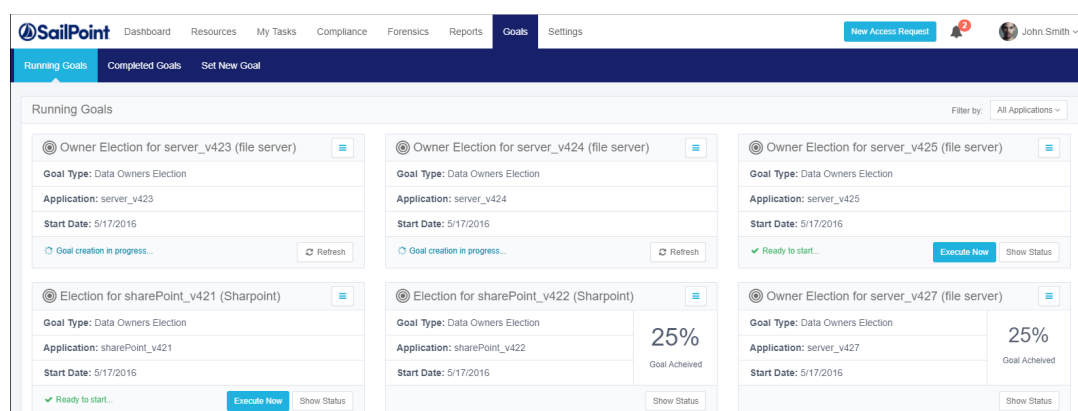
A running goal is a goal in process, in which no owner has yet been assigned to the goal resource. Any number of running goals may be displayed at any given time.

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.

Note: 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 goal titled "Data Owners Election". The goal is for "Owner Election for server\_v423 (file server)" and is currently in the "Election (Finished)" state. The interface displays a list of resources on the left, including "C:\\$Recycle.Bin", "C:\inetpub", and "C:\PerfLogs". The main area shows "Current Results (2 out of 5 participants voted)" with a table of candidates and their vote percentages:

Rank	Candidate	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.

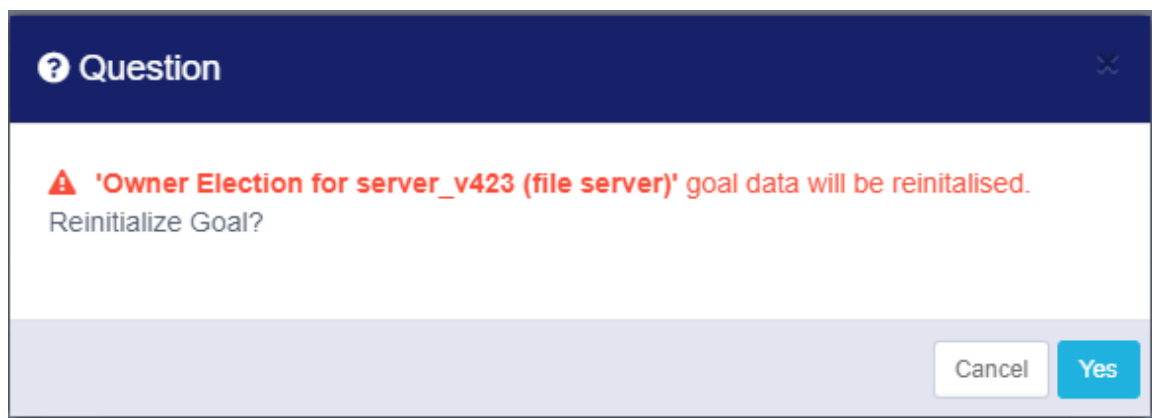
The screenshot shows the SailPoint interface. At the top, there is a navigation bar with the SailPoint logo and links for Dashboard, Resources, My Tasks, and Compliance. Below this is a secondary navigation bar with three tabs: Running Goals (highlighted in blue), Completed Goals, and Set New Goal. The main content area is titled 'Running Goals' and contains a single goal card. The goal card has a title 'Owner Election for server\_v423 (file server)' with a menu icon to its right. Below the title, there are four rows of information: 'Goal Type: Data Owners Election', 'Application: server\_v423', 'Start Date: 5/17/2016', and 'Goal creation in progress...'. A dropdown menu is open to the right of the goal card, containing four options: 'View Details' (with an eye icon), 'Refresh' (with a refresh icon), 'Reinitialize Goal' (with a circular arrow icon), and 'Delete' (with a trash icon).

## 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

Note: 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.

Note: 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