

Data Owner Client

Version 6.6

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About This Guide

This guide is written to provide Data Owners the conceptual and procedural information for using the OpenText File Dynamics 6.6 Data Owner Client. This includes:

- Notifications of security changes to high-value target paths
- Recovering Data from Epochs
- Performing remediation via Workload policies
- Using Recent Files

Audience

This guide is intended for designated File Dynamics 6.6 Data Owners.

1 - Introduction

This chapter provides an introduction to the role of Data Owner in a File Dynamics deployment and how to perform tasks using the Data Owner Client.

1.1 - About the Data Owner Client

The Data Owner Client is the administrative tool used by designated Data Owners to perform specific types of data management actions. These actions include:

- Reporting on security changes to high-value target paths.
- Recovering archived data and permissions from high-value target paths.
- Importing and initiating remediation actions via File Dynamics Workload policies.

The Data Owner Client is delivered as both a desktop application that runs on a Windows desktop and web service that you can access from a modern browser on any desktop platform.

1.2 - Data Owners

Network administrators assign individuals to be Data Owners when they create the following types of File Dynamics policies:

- Security Notification policies
- Security Lockdown policies
- Security Fencing policies
- Epoch Data Protection policies
- Workload policies

In addition to direct assignments through these policies, members of the File Dynamics Admins group have permissions to perform the tasks that Data Owners can perform.

Data Owners are normally assigned based on a user's association with a folder or share that an administrator classifies as a high-value target. For example, if the Human Resources network share were to be classified as a high-value target, and the administrator were to create an Epoch Data Protection policy to archive files on that share, it would make the most sense to make a member of the HR Department a Data Owner for the policy.

1 - Introduction

Making a user who is associated with a high-value target the Data Owner, also makes sense because the user, based on his or her role, would be more familiar with the documents that need to be secured, recovered, or moved. Using the Human Resources network share again as an example, the Data Owner could view the contents of the Epochs and quickly determine which version of the file is the one to recover.

2 - Desktop Client

The Data Owner Desktop Client is a Windows application that you can install and run on a Windows desktop or server. Select the desktop client if any of the following apply to you as a Data Owner:

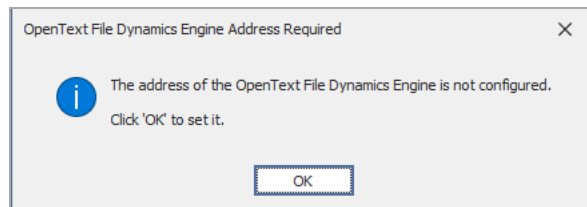
- You need to manage data via Epoch Data Protection policies —the Data Owner web client does not include support for Epoch Data Protection.
- You need to generate Security Policy reports containing several thousand pages or more in a single report.

See the following for details on installing and using the Data Owner Desktop Client:

2.1 - Installing the Data Owner Client

The Data Owner Client can be installed on any platform where .NET 7.0 can run.

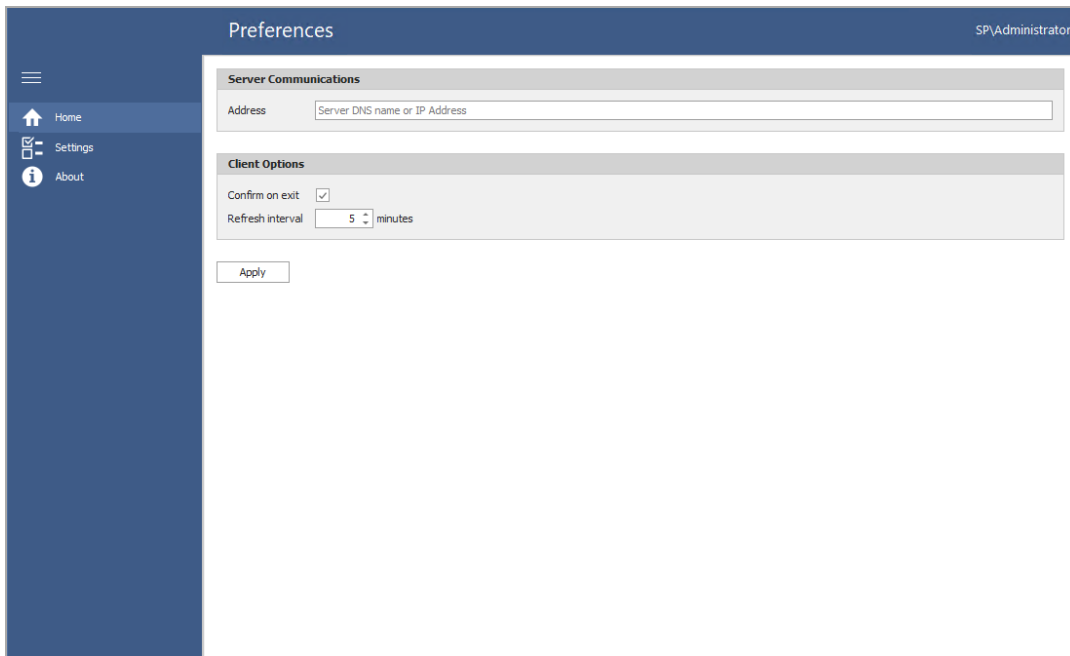
1. On the Windows server or workstation where you will run the Data Owner Client, copy to a directory the `FileDynamics_6.6.iso`.
2. Mount the `FileDynamics_6.6.iso` file.
3. At the root of the `FileDynamics_6.6.iso` image, double-click `FileDynamics-DataOwnerClient-6.6-xx.exe`.
4. Agree to the licensing terms and conditions and click *Install*.
5. When notified that the setup was successful, click *Run Data Owner Client*.
The following notification appears:



2 - Desktop Client

6. Click *OK*.

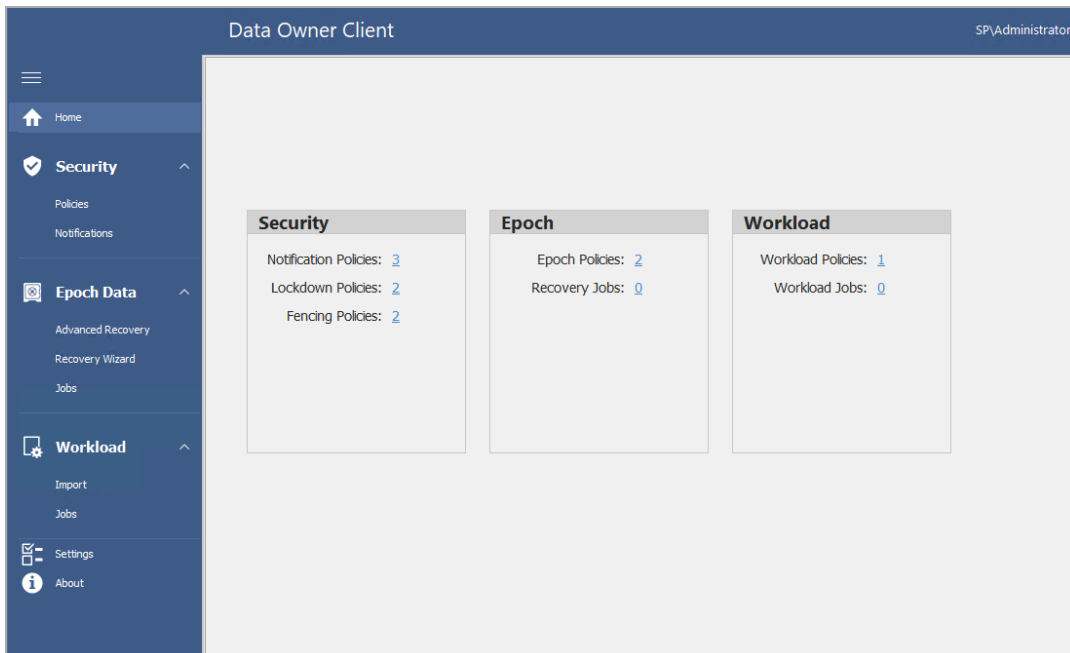
The following dialog box appears:



The screenshot shows the 'Preferences' dialog box in the SP Administrator application. The title bar reads 'Preferences' and 'SP\Administrator'. On the left is a sidebar with 'Home', 'Settings', and 'About' options. The main content area is divided into two sections: 'Server Communications' and 'Client Options'. The 'Server Communications' section has an 'Address' field with the placeholder text 'Server DNS name or IP Address'. The 'Client Options' section has a 'Confirm on exit' checkbox (checked) and a 'Refresh interval' dropdown set to '5 minutes'. An 'Apply' button is at the bottom.

7. In the *Address* field, specify the DNS name or IP address of the server hosting the File Dynamics Engine.

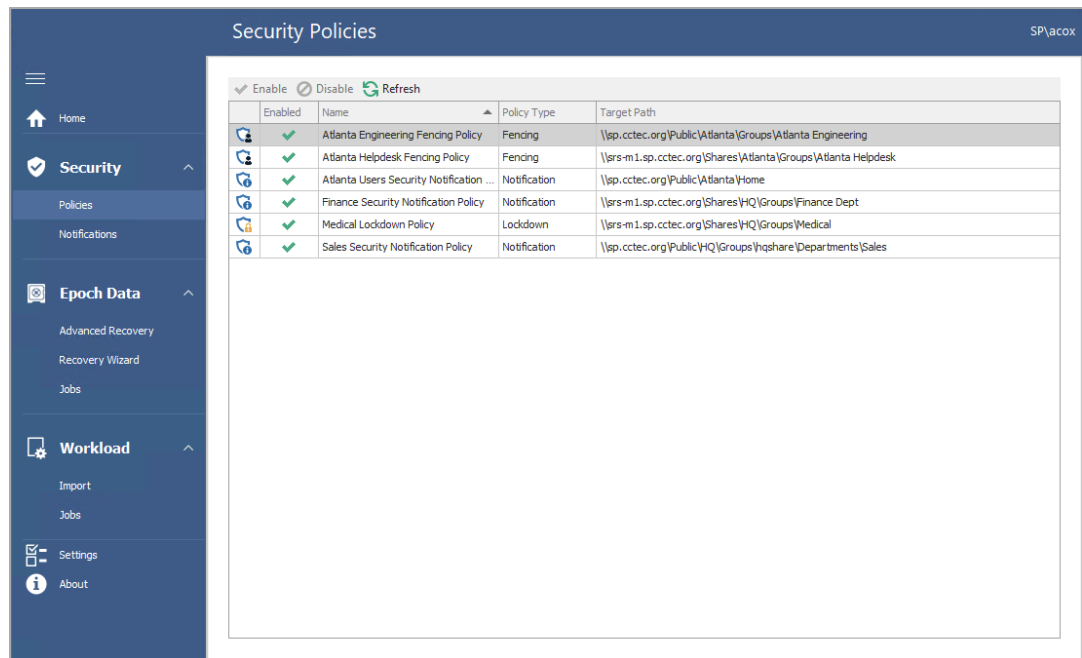
The following interface appears, indicating that the Data Owner Client is configured.



The screenshot shows the 'Data Owner Client' interface in the SP Administrator application. The title bar reads 'Data Owner Client' and 'SP\Administrator'. The left sidebar is expanded, showing 'Security', 'Epoch Data', and 'Workload' sections. The main content area displays three summary cards: 'Security' (Notification Policies: 3, Lockdown Policies: 2, Fencing Policies: 2), 'Epoch' (Epoch Policies: 2, Recovery Jobs: 0), and 'Workload' (Workload Policies: 1, Workload Jobs: 0).

In the example above, Amanda Cox was specified previously as a Data Owner for Security, Epoch, and Workload policies, and each policy has been run at least once (resulting in a stored scan). If a user has not yet been specified for as a Data Owner in a policy, or has, but the policies have not yet been run, the right pane will be empty.

The numbers associated with each listed policy specify the number of policies of that type of which the logged in user is a Data Owner. For example, Amanda Cox is the Data Owner of one Security Notification policy. Clicking a number brings up details about the policies.

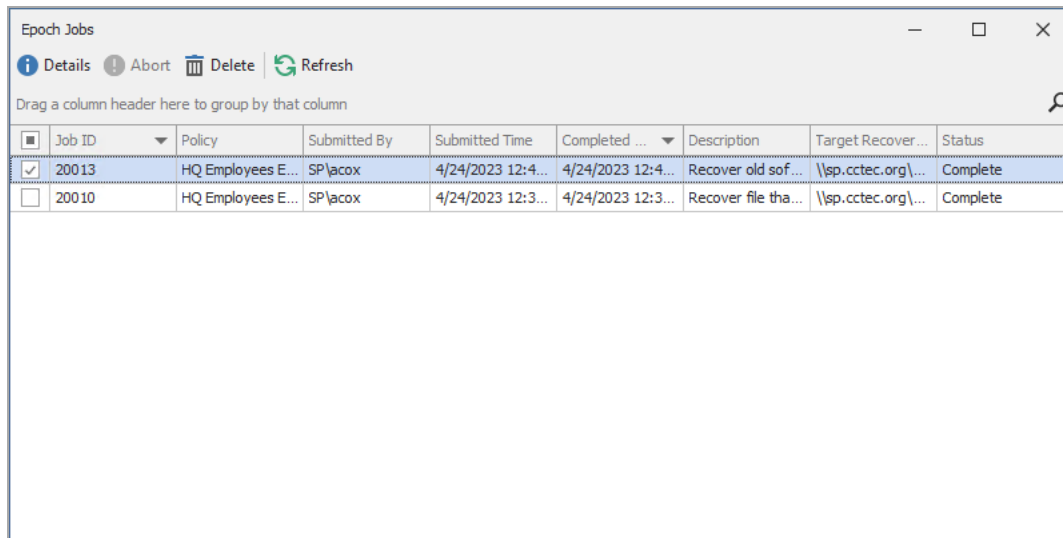


Security Policies			
<input checked="" type="checkbox"/> Enable <input type="checkbox"/> Disable <input type="button" value="Refresh"/>			
Enabled	Name	Policy Type	Target Path
	Atlanta Engineering Fencing Policy	Fencing	\\sp.cctec.org\Public\Atlanta\Groups\Atlanta Engineering
	Atlanta Helpdesk Fencing Policy	Fencing	\\srs-m1.sp.cctec.org\Shares\Atlanta\Groups\Atlanta Helpdesk
	Atlanta Users Security Notification ...	Notification	\\sp.cctec.org\Public\Atlanta\Home
	Finance Security Notification Policy	Notification	\\srs-m1.sp.cctec.org\Shares\HQ\Groups\Finance Dept
	Medical Lockdown Policy	Lockdown	\\srs-m1.sp.cctec.org\Shares\HQ\Groups\Medical
	Sales Security Notification Policy	Notification	\\sp.cctec.org\Public\HQ\Groups\hqshare\Departments\Sales

In the example above, Amanda Cox can view the Security policies for which she is a Data Owner.

2 - Desktop Client

The numbers associated with jobs specify the number of jobs that have been run. Clicking the number brings up details of all of the jobs.



The screenshot shows a window titled "Epoch Jobs" with a toolbar containing "Details", "Abort", "Delete", and "Refresh" buttons. Below the toolbar is a text prompt "Drag a column header here to group by that column" and a search icon. The main area contains a table with the following data:

<input type="checkbox"/>	Job ID	Policy	Submitted By	Submitted Time	Completed ...	Description	Target Recover ...	Status
<input checked="" type="checkbox"/>	20013	HQ Employees E...	SP\acox	4/24/2023 12:4...	4/24/2023 12:4...	Recover old sof...	\\sp.cctec.org\...	Complete
<input type="checkbox"/>	20010	HQ Employees E...	SP\acox	4/24/2023 12:3...	4/24/2023 12:3...	Recover file tha...	\\sp.cctec.org\...	Complete

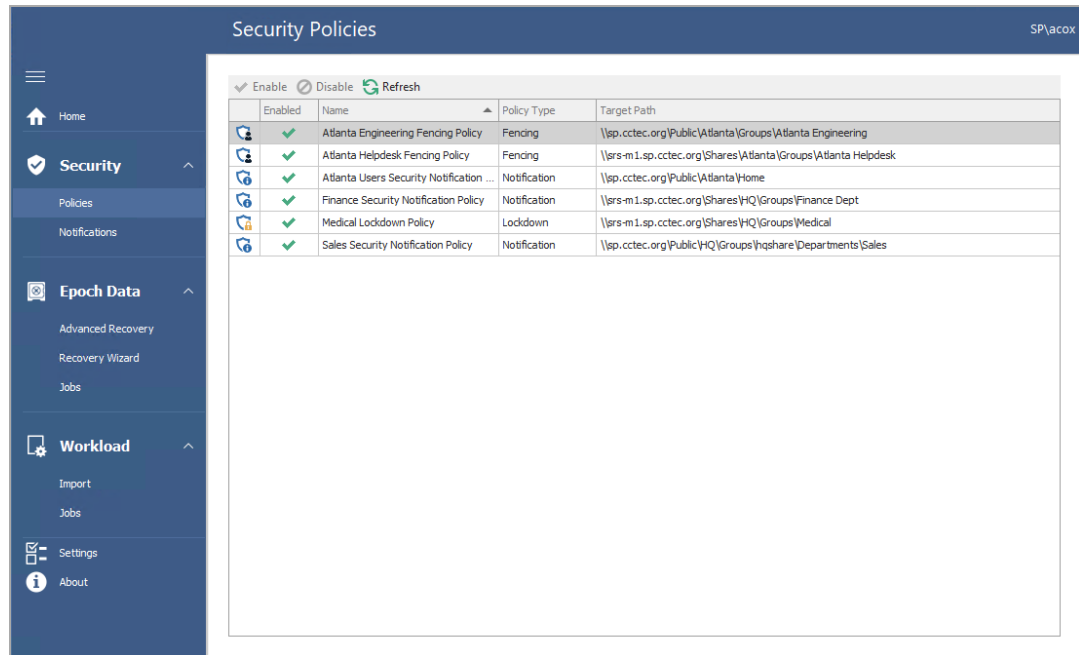
In the example above, each of the saved jobs are listed. You can get additional details about a job by double-clicking a listing from the job list.

2.2 - Security Notifications and Actions

The *Security* region of the Data Owner Client provides the means of getting notifications when access permissions for specified target paths have changed, viewing reports, and when authorized to do so, disabling and enabling a policy.

2.2.1 - Viewing Security Policies

1. Click *Security > Policies* to view a list of Security policies to which you have been assigned as a Data Owner.



- Click each listing individually to see if you have been authorized to enable or disable a policy.

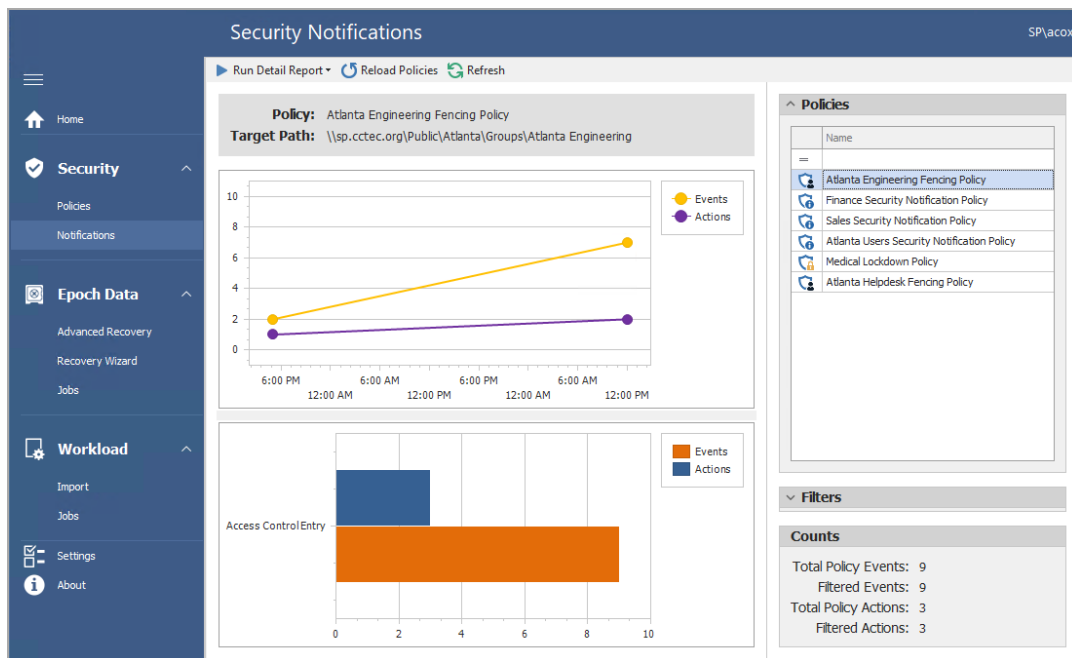
In the graphic above, Amanda Cox is authorized to disable the Medical Lockdown policy.

2.2.2 - Viewing Notifications

Notifications in the Data Owner Client display graphically security-specific events and resulting actions according to the filters you specify. Events take place in the network file system, actions are what File Dynamics did as a result.

2 - Desktop Client

1. Click *Security > Notifications* to access the Security Notifications page.

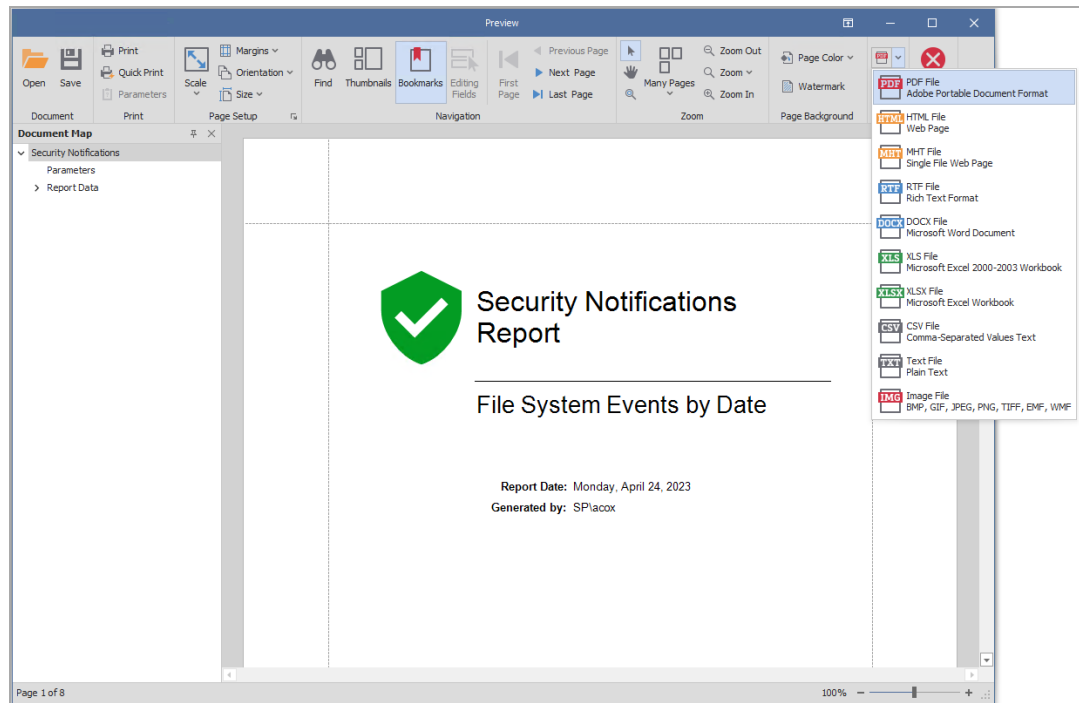


2. From the *Policies* list, select the policy for which you want to see graphical information and reported in the Detail Report.

If the policies are not displayed, you can click *Reload Policies* and select the security policy types to display.

3. From the *Filters* region, specify the options you want displayed in the graphs and reported in the Detail Report.
4. In the same region, specify the date range you want displayed in the graphs and reported in the Detail Report.
5. From the *Run Detail Report* drop-down menu, choose one of the following options:
 - **File System Events:** Generates a preview report of file system events that have taken place within the parameters you have specified in the right-hand portion of the Security Notifications page.
 - **Group Membership Events:** Generates a preview report of group membership events that have taken place within the parameters you have specified in the right-hand portion of the Security Notifications page.

- From the report dialog box, export or email the report in the format you want.



2.2.3 - Generating Detail Reports

The Data Owner Client notifies the Data Owner of security changes for target paths through generated reports. The Data Owner Client generates the following reports.

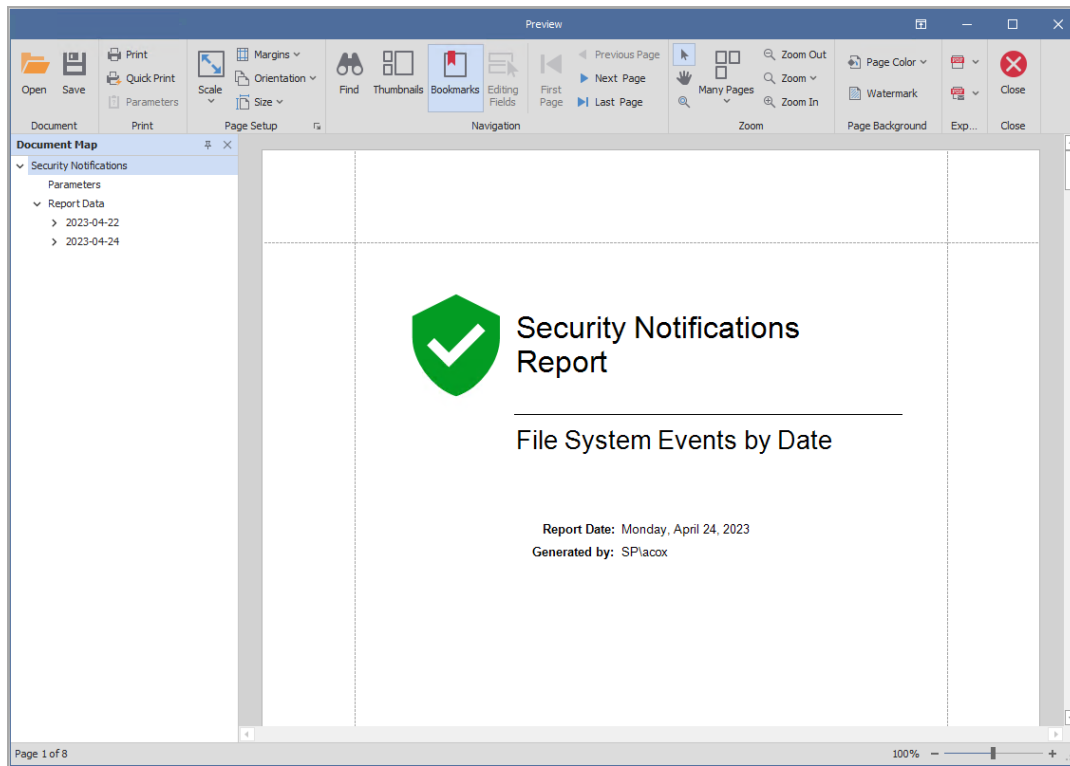
File System Events Reports

File System Events reports detail the changes in permissions that have taken place within the designated target path.

- Click *Security > Notifications* to access the Security Notifications page.
- In the *Filters* region of the page, specify if you want the report to include Events, Actions, or both by selecting the appropriate check boxes.
- From the *Run Detail Report* drop-down menu, select *File System Events*.

2 - Desktop Client

The report is generated in preview mode where it can be printed or saved into a variety of formats.

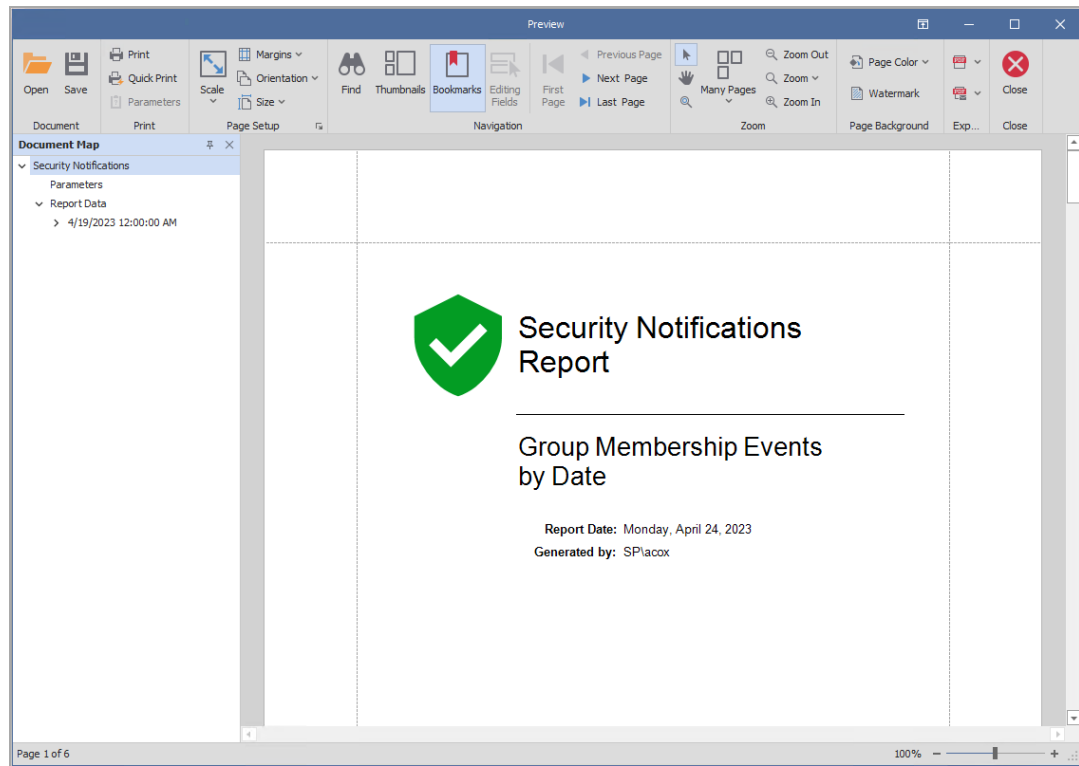


Group Membership Events Reports

Group Membership Events reports detail the changes in group memberships that have taken place for groups that have access to the designated target path.

1. Click *Security > Notifications* to access the Security Notifications page.
2. In the *Filters* region of the page, specify if you want the report to include Events, Actions, or both by selecting the appropriate check boxes.
3. From the *Run Detail Report* drop-down menu, select *Group Membership Events*.

The report is generated in preview mode where it can be printed or saved into a variety of formats.



2.2.4 - Disabling a Policy

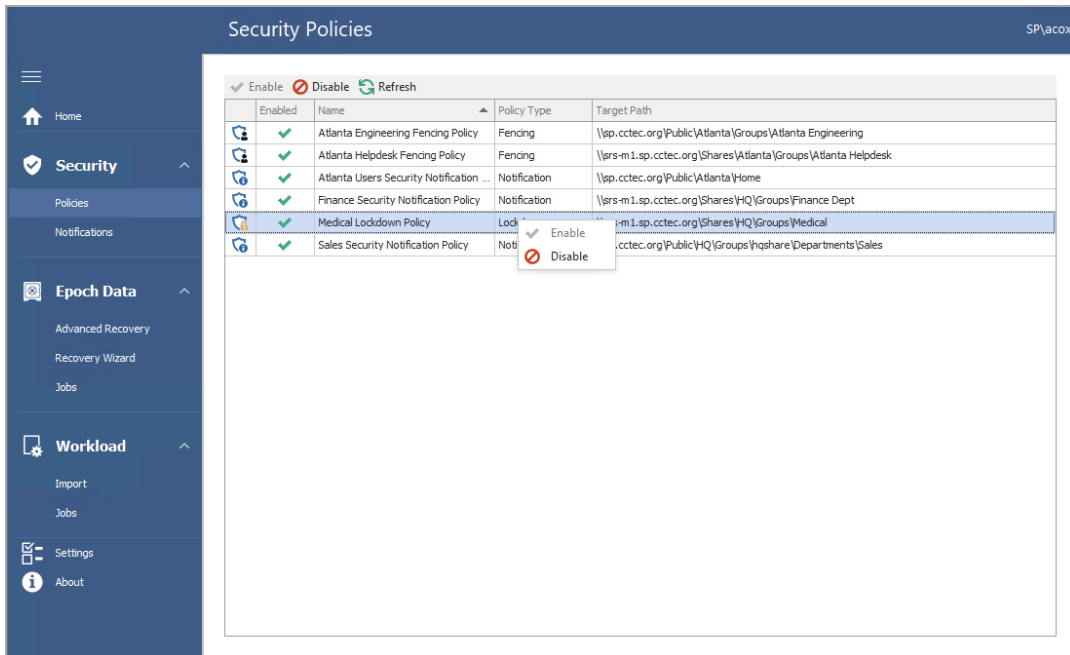
Data Owners authorized to disable a policy will normally do so when access permissions to a high-value target need to be temporarily overridden or modified.

Disabling a policy stops all scheduled security scans until it is enabled.

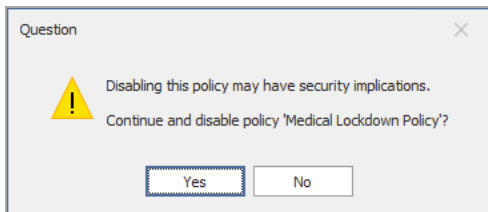
A Data Owner that has been authorized to disable a policy is also authorized to enable a policy.

1. From the list of security policies, select the policy you want to disable, right-click and select *Disable*.

2 - Desktop Client

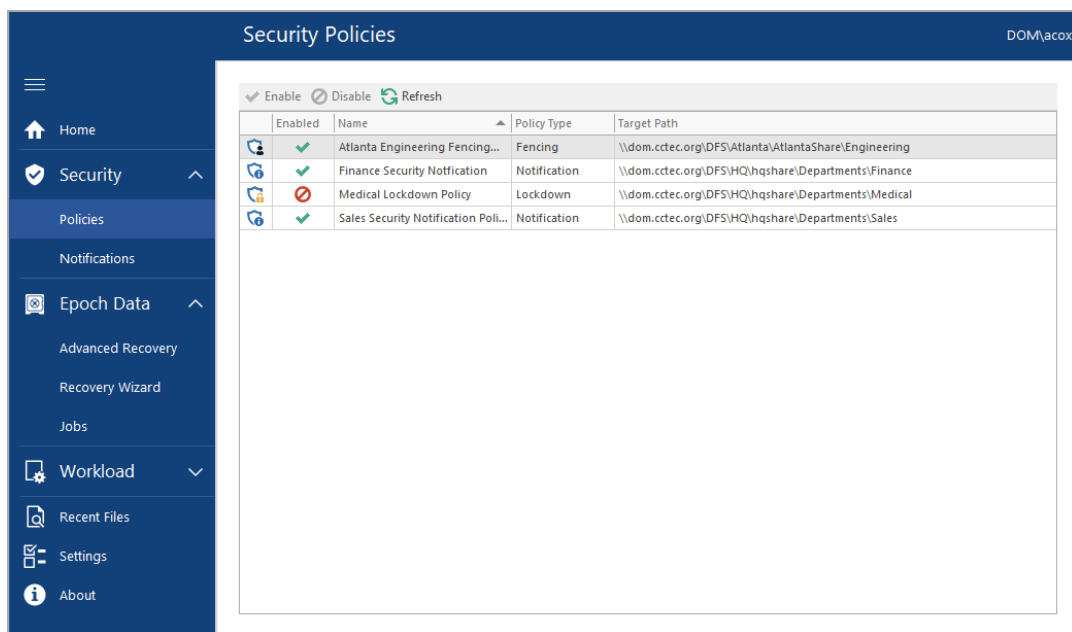


The following dialog box appears:



2. Click Yes.

The policy is displayed as disabled.

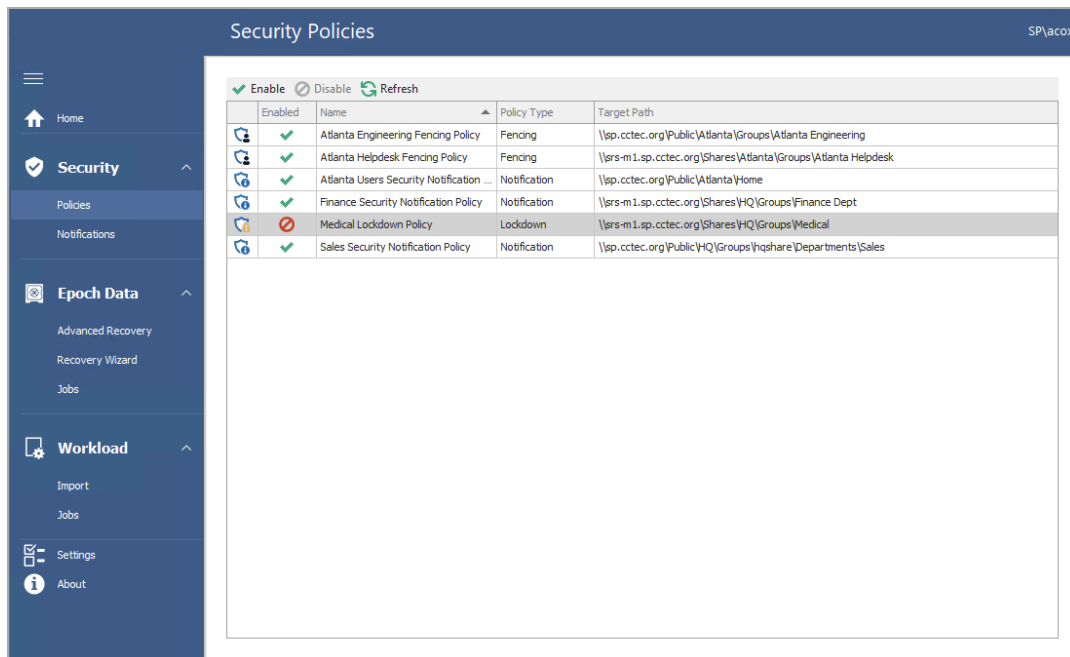


2.2.5 - Enabling a Policy

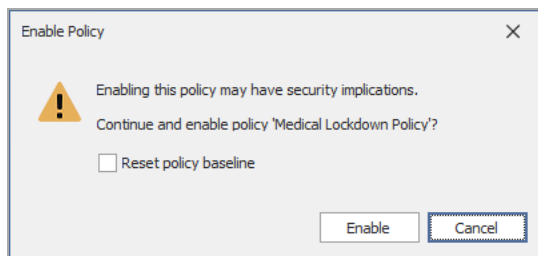
Once the IT department has concluded its need for disabling the policy, an authorized Data Owner can enable the policy using the Data Owner Client.

1. From the list of security policies, select the policy you want to enable, right-click and select *Enable*.

2 - Desktop Client



The following dialog box appears:



2. Do one of the following:

- If you want to keep the original baseline permissions for the target path before the policy was disabled, click *Enable*.
- If you want establish the new permissions specified in the policy for the target path, select the *Reset* policy baseline check box and click *Enable*.

This option removes previous security scans from the database and initiates a new security scan that will serve as the baseline.

2.3 - Epoch Data Protection

The Data Owner Client provides two methods of recovering data:

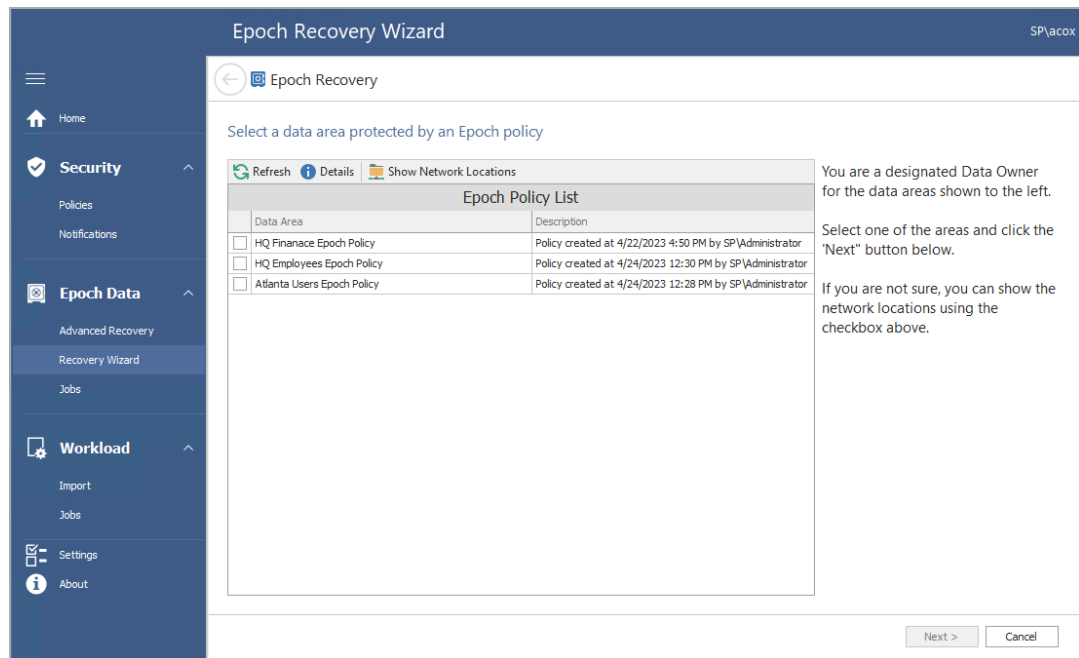
- The Recovery Wizard
- The Advanced Recovery interface

There are specific advantages to both interfaces and an explanation of these advantages precedes the procedures linked below.

2.3.1 - Recovering Data Using the Recovery Wizard

The Recovery Wizard allows you to recover data through step-by-step instructions provided in a wizard interface. For Data Owners that don't recover data very often, this might be the fastest means of recovering data, due to the easy-to-follow interface.

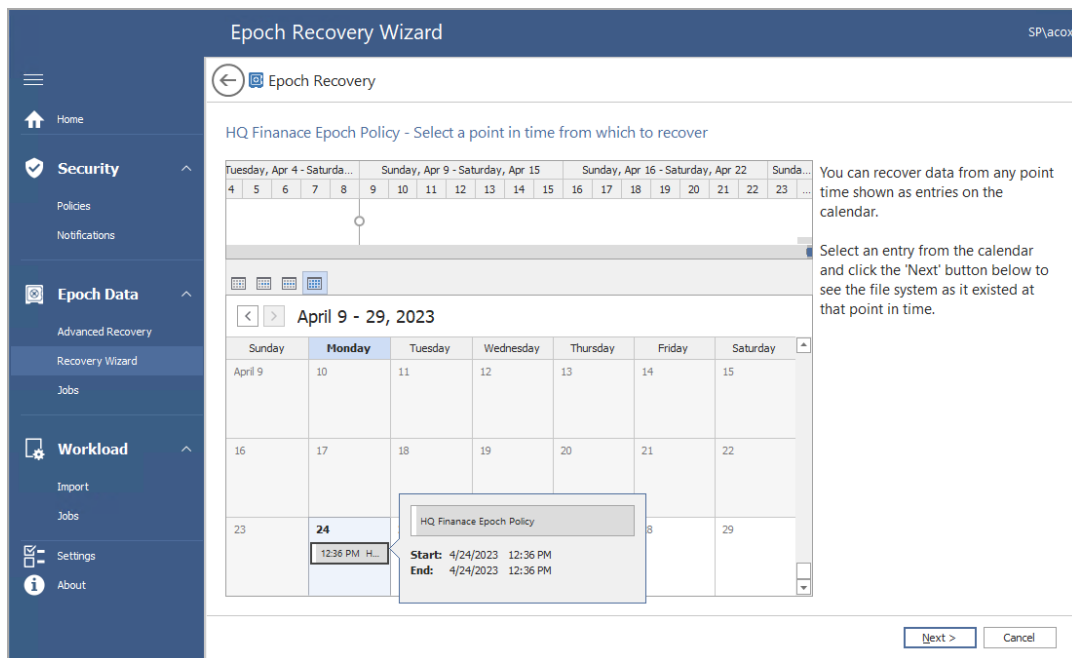
1. From the list of Epoch Data policies, select the one from which you will be recovering data.



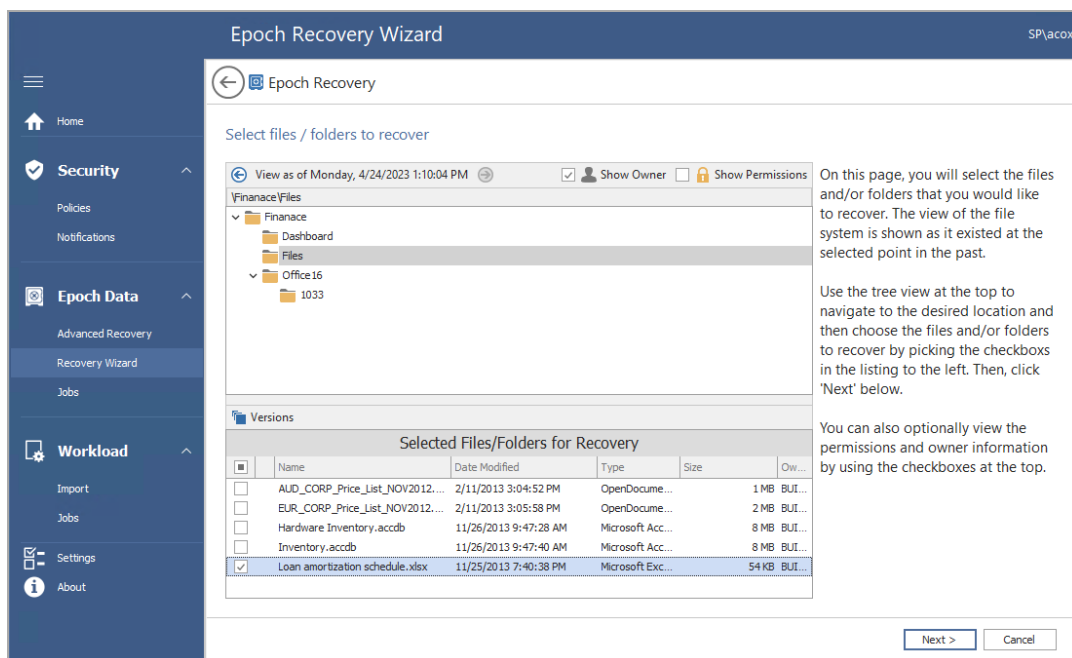
2. Click *Next*.

2 - Desktop Client

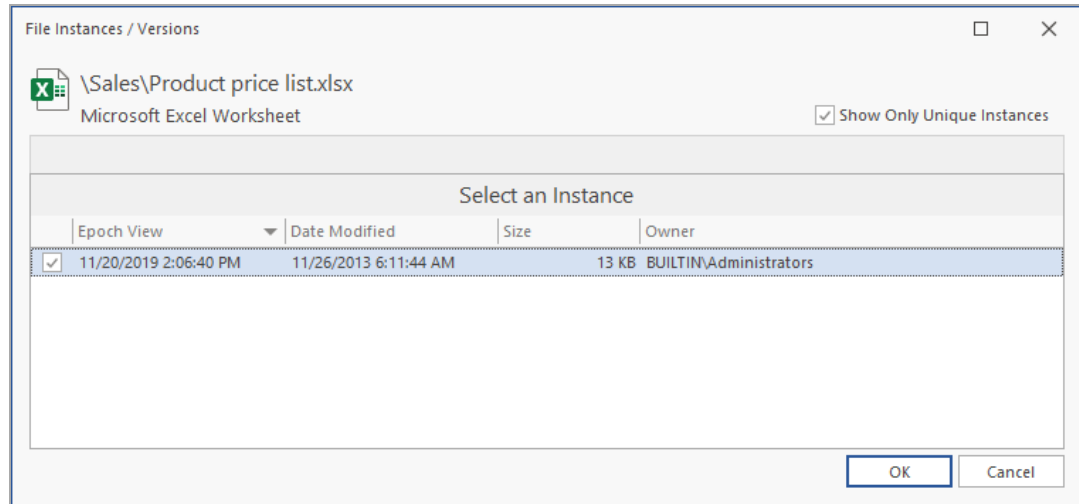
3. From the calendar, select the Epoch from which you want to recover data.



4. Click *Next*.
5. In the *Selected Files / Folders for Recovery* region of the page, select the files and folders to recover.

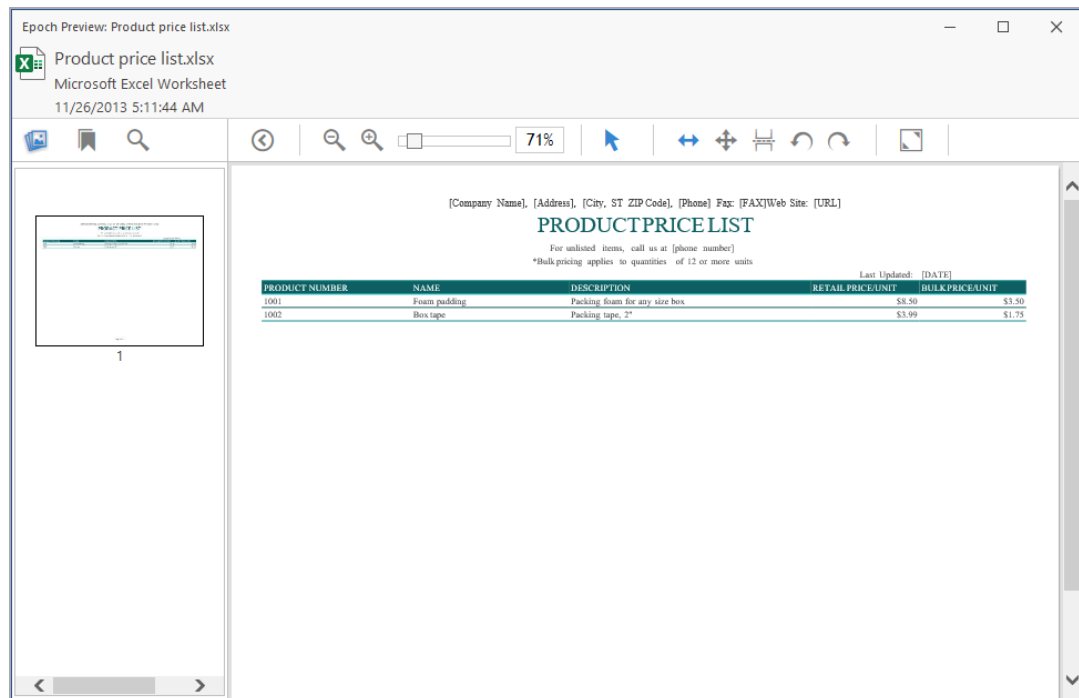


If there is another version of the selected document in another epoch, the *Versions* button becomes active.



- Double-click the selected file to view a rendering of the file and verify that it is the file you want to recover.

A rendering of the selected file appears.



- Verify that the rendered file is the file you want to recover.

2 - Desktop Client

8. Close the rendered file.
9. In the Recovery Wizard, click *Next*.

The screenshot shows the 'Epoch Recovery Wizard' window. The title bar includes the text 'Epoch Recovery Wizard' and 'DOM\jacob'. On the left is a dark blue sidebar with a menu containing: Home, Security (with a sub-menu for Policies and Notifications), Epoch Data (with sub-menus for Advanced Recovery, Recovery Wizard (highlighted), and Jobs), Workload (with sub-menus for Import and Jobs), Recent Files, Settings, and About. The main content area is titled 'Epoch Recovery' and contains the instruction 'Choose where selected files / folders should be recovered'. It features two sections: 'Selected Recovery Source' with fields for 'Epoch' (Sales Records and Projections at 11/20/2019 2:06:40 PM) and 'Path' (\\dom.ctec.org\DFS\HQ\hqshare\Departments\Sales); and 'Recovery Location' with a checked checkbox for 'Recover To Original Location'. At the bottom right are 'Next >' and 'Cancel' buttons.

If the Epoch Data Protection policy allows for data recovery to a different location, you can deselect the *Recover to Original Location* check box to specify a location in the file system where the recovered file will be stored.

10. Click *Next*.
11. In the *Recovery Options* region of the wizard page, specify whether to overwrite data or not, whether to overwrite or merge permissions, and whether to recover the original file ownership settings.

12. In the *Description* field, provide a description of this recovery instance.

The screenshot shows the 'Epoch Recovery Wizard' window. The left sidebar contains navigation links: Home, Security (Policies, Notifications), Epoch Data (Advanced Recovery, Recovery Wizard, Jobs), Workload (Import, Jobs), Settings, and About. The main content area is titled 'Epoch Recovery' and 'Select recovery options'. It includes sections for 'Recovery Options' (with checkboxes for 'Recover Data' and 'Recover File Owners'), 'File Data Overwrite Options' (with radio buttons for 'Never' and 'Always'), and a 'Description (required)' text box containing 'recover spreadsheet'. On the right, instructional text explains the purpose of the options and the description. At the bottom right are 'Next >' and 'Cancel' buttons.

13. Click *Next*.

The screenshot shows the 'Epoch Recovery Wizard' window at the 'Finish / See Results' stage. The left sidebar is the same as in the previous screenshot. The main content area displays a summary of the recovery request. It includes a 'Description' section with the text 'recover spreadsheet', a 'Selected for Recovery' section showing 'Total Files: 1', 'Total Folders: 0', and 'Total Size: 55,259 bytes', and a 'Recover' section with 'From' and 'To' paths. Below these is the 'Finish Recovery Options' section, which includes checkboxes for 'Recover Data' and 'Recover File Owners', and 'File Data Overwrite Options' (radio buttons for 'Never' and 'Always'). On the right, instructional text guides the user to confirm details and submit the request. At the bottom right are 'Submit' and 'Cancel' buttons.

14. Review the specifications of the recovery request.

2 - Desktop Client

If you need to make any corrections you can go back to previous pages to do so.

15. Click *Submit*.

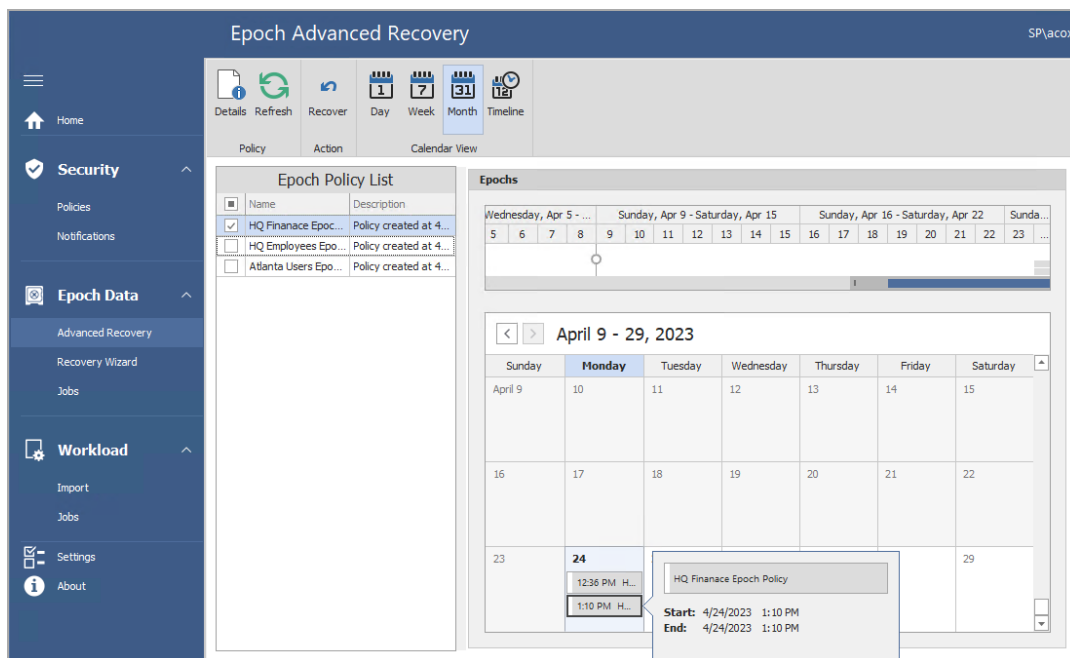
The Manage Recovery Jobs dialog box appears with the new recovery job located at the top, along with details of the data recovery.

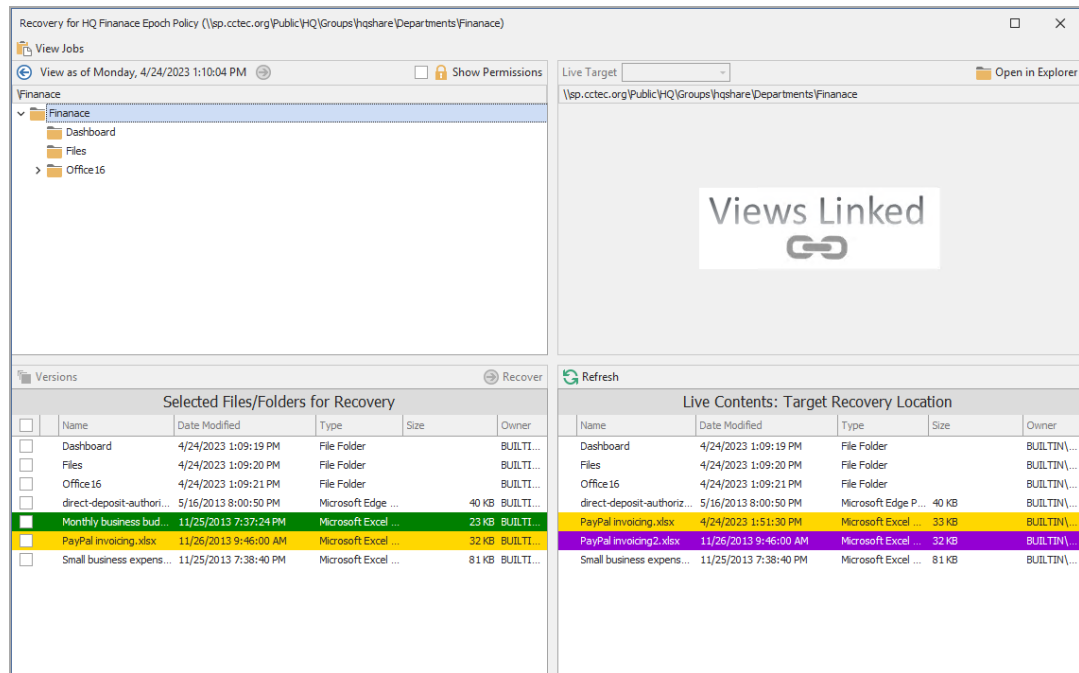
16. In the Manage Recovery dialog box, click *Refresh* to get an update of the status of the recovery.

2.3.2 - Recovering Data Using Advanced Recovery

The Advanced Recovery interface provides more advanced options for recovering data. Data Owners who frequently recover data and consequently, become quite familiar with the Advanced Recovery interface, might want to use this as the means of data recovery.

1. Click *Epoch Data > Advanced Recovery*.
2. From the Epoch Policy List, select an Epoch policy.
3. From the calendar, select an Epoch.



4. Click *Recover*.

This interface features a side-by-side view of the selected Epoch (on the left) and the live file system's target recovery location (on the right).

Yellow highlighted files indicate that a file with the same name exists in both the Epoch and the live file system. These files are highlighted because if you recover the file from the Epoch, you might possibly overwrite the version of the file you actually want.

Green highlighted files indicate that the file only resides in the Epoch and that there is no chance of overwriting a file with the same name on the live file system.

Purple highlighted files indicate that these files exist only in the live file system and not in the Epoch.

Orange highlighted files indicate that the file is the live file system is older than the file in the epoch.

View Jobs: Clicking this accesses the Manage Recovery Jobs dialog box that lists all recovery jobs performed. Clicking an individual job listing opens a Recovery Jobs Detail dialog box that provides specific information about the recovery job.

Show Permissions: When selected, this specifies all users and groups that have permissions to a selected folder from the Epoch, and what those specific permissions are. This information is useful to have before you recover a folder because when you do so, you can specify to keep the existing permissions or to overwrite them with the permissions (including inherited) that exist in the live network.

Live Target: If the Epoch Data Protection policy specifies that files can be recovered to an Alternate path or Anywhere, these options appear in the drop-down menu. Selecting either of these options lets you then specify a location where the recovered file will be stored.

Open in Explorer: This provides the ability to open files in the live file system. You might want to use this before a recovery when you need to compare the differences between a rendered file from the Epoch with the same named file in the live file system.

Versions: When a single file is selected from an Epoch, you can view specific metadata of the file by clicking this.

Preview: When a single file is selected from an Epoch, you can click *Preview* to view a rendering of the file and verify that it is the file you want to recover.

Recover: This is the means of initiating the file or folder recovery.

Refresh: Refreshes the displayed contents based on any updates.

5. From the left side of the interface, select the folders or files you want to recover.

6. Click *Recover*.

Submit Recovery Job

Selected for Recovery

Total Files: 1
Total Folders: 0
Total Size: 23,318 bytes

Recover To

\\sp.cctec.org\Public\HQ\Groups\hqshare\Departments\Finanace

Recovery Options

☒ Recover Data

File Data Overwrite Options

☐ Never
☒ Always

☒ Recover File Owners

Description (required)

Submit Cancel

Selected for Recovery: Displays the number of selected files and folders, along with the total size.

Recover To: Displays the path where the folders and files will be located once they are recovered.

Recovery Options: This region allows you to specify parameters for the recovery.

Recover Data: If the items in the *Selected Files/Folders for Recovery* list do not include folders, this option is selected and cannot be overridden. If your selected items include folders, you can deselect this check box, meaning that you are only want to recover the permissions on the same named folder in the live file system.

File Data Overwrite Options: Lets you specify what to do with recovered files from the Epoch when there are files with the same name on the target. Selecting *Never* means that the file will not be recovered. *Always* means that the file will be recovered and will overwrite the file on the target – even if the file is newer.

Recover File Owners: Selecting this check box specifies that the owners for all recovered files and folders will remain the owners when the Epoch was saved. Deselecting this check box will leave the owner as it exists in the live file system.

Recover Folder Security: This check box is displayed only when the selected data for recovery includes folders. Selecting this check box specifies that you want recovered folders to maintain the folder permissions.

Security Overwrite Options: Lets you specify what to do with recovered folders from the Epoch when there are folders with the same name on the target. Selecting *Merge* will merge the permissions of the recovered folder with those of the same named folder in the live file system. Selecting *Overwrite* will overwrite the permissions of the same named folder on the live file system and replace those permissions with those of the recovered folder.

Description: Lets you provide a description of this recovery instance. You must provide a description before the *Submit* button is activated.

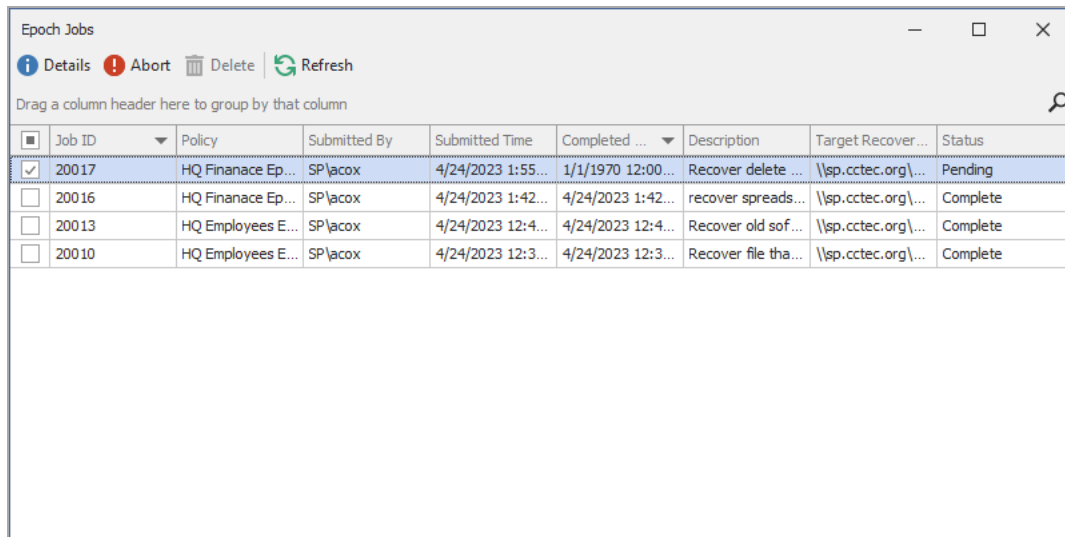
7. Specify your recovery options in the Submit for Recovery Job dialog box and click *Submit*.
8. When the confirmation dialog box appears, click *Yes*.

The Manage Recovery Jobs dialog box appears with the new recovery job located at the top, along details of the data recovery.

9. In the Manage Recovery dialog box, click *Refresh* to get an update of the status of the recovery.

2.3.3 - Managing Recovery Jobs

Clicking the *Jobs* tile brings up a list of recovery jobs.



The screenshot shows a window titled "Epoch Jobs" with a toolbar containing "Details", "Abort", "Delete", and "Refresh" buttons. Below the toolbar is a search bar and a prompt to drag a column header for grouping. The main area contains a table with the following data:

	Job ID	Policy	Submitted By	Submitted Time	Completed ...	Description	Target Recover ...	Status
<input checked="" type="checkbox"/>	20017	HQ Finanace Ep...	SP\acox	4/24/2023 1:55...	1/1/1970 12:00...	Recover delete ...	\\sp.cctec.org\...	Pending
<input type="checkbox"/>	20016	HQ Finanace Ep...	SP\acox	4/24/2023 1:42...	4/24/2023 1:42...	recover spreads...	\\sp.cctec.org\...	Complete
<input type="checkbox"/>	20013	HQ Employees E...	SP\acox	4/24/2023 12:4...	4/24/2023 12:4...	Recover old sof...	\\sp.cctec.org\...	Complete
<input type="checkbox"/>	20010	HQ Employees E...	SP\acox	4/24/2023 12:3...	4/24/2023 12:3...	Recover file tha...	\\sp.cctec.org\...	Complete

From here, you can double-click a job to see more details, abort a pending job, or remove jobs from the list.

2.4 - Workload Actions

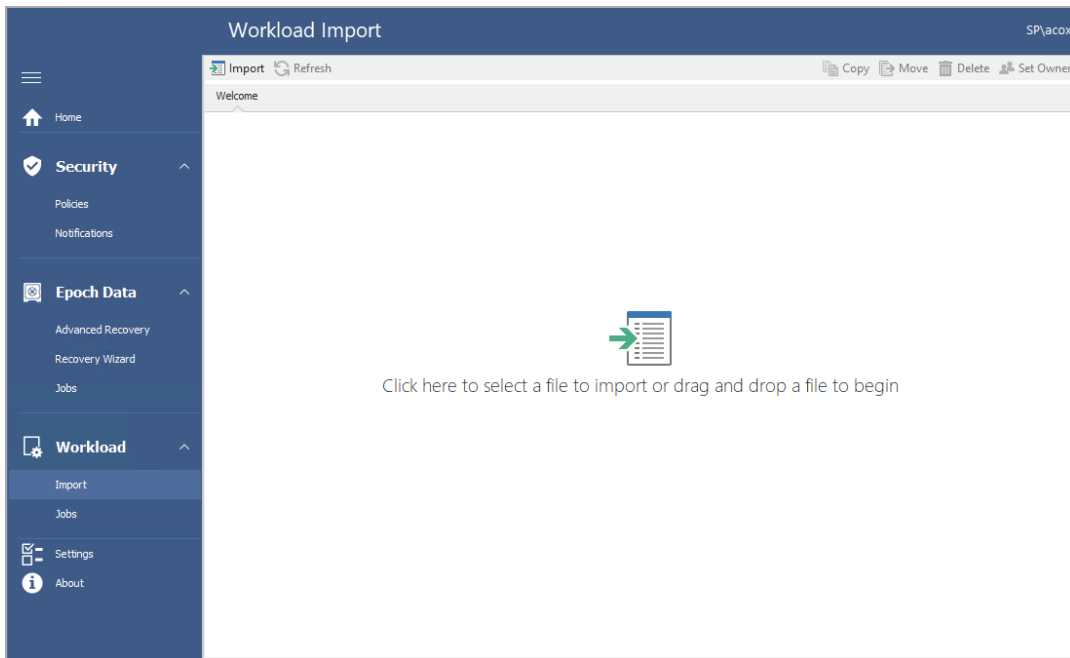
Workload policies in File Dynamics provide the ability to handle work processes initiated from other applications. For example, reports generated in OpenText OpenText File Dynamics that specify the location of sensitive files can be imported into the Data Owner Client where a designated Data Owner can remediate the location of these sensitive files. This approach empowers organizations to provide automated network file system security remediation approved by a gatekeeper familiar with the files.

Imported files can be in either CSV or TXT format.

2 - Desktop Client

2.4.1 - Running Workload Jobs

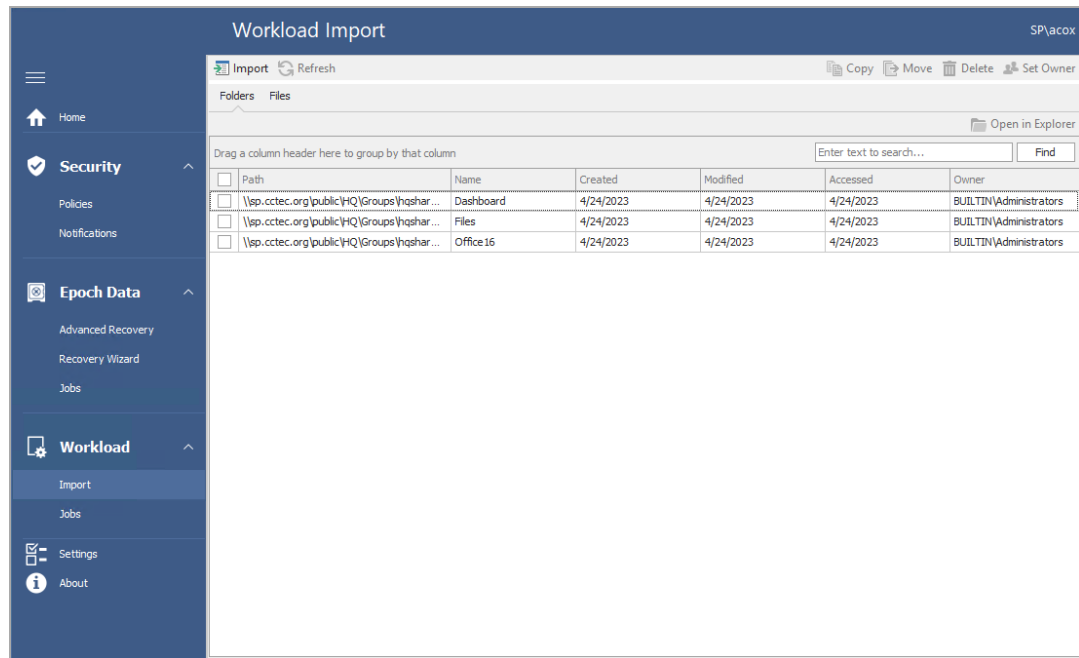
1. Click *Workload > Import*.



2. Do one of the following:

- On the Import page, drag the file you want to import.
- Click the Import page, browse and then select the file you want to import.

The Import dialog box appears with the contents of the imported file.



3. Select each of the entries you want by clicking its corresponding check box and select whether to *Copy*, *Move*, *Delete*, or *Set Owner*.

See the following sections for details on each of these operations.

2.4.2 - Copy

This option copies the files specified in each of the entries you select. The option simply duplicates the files and places the duplicate versions in a location where the Data Owner has been granted access via a Workload policy.

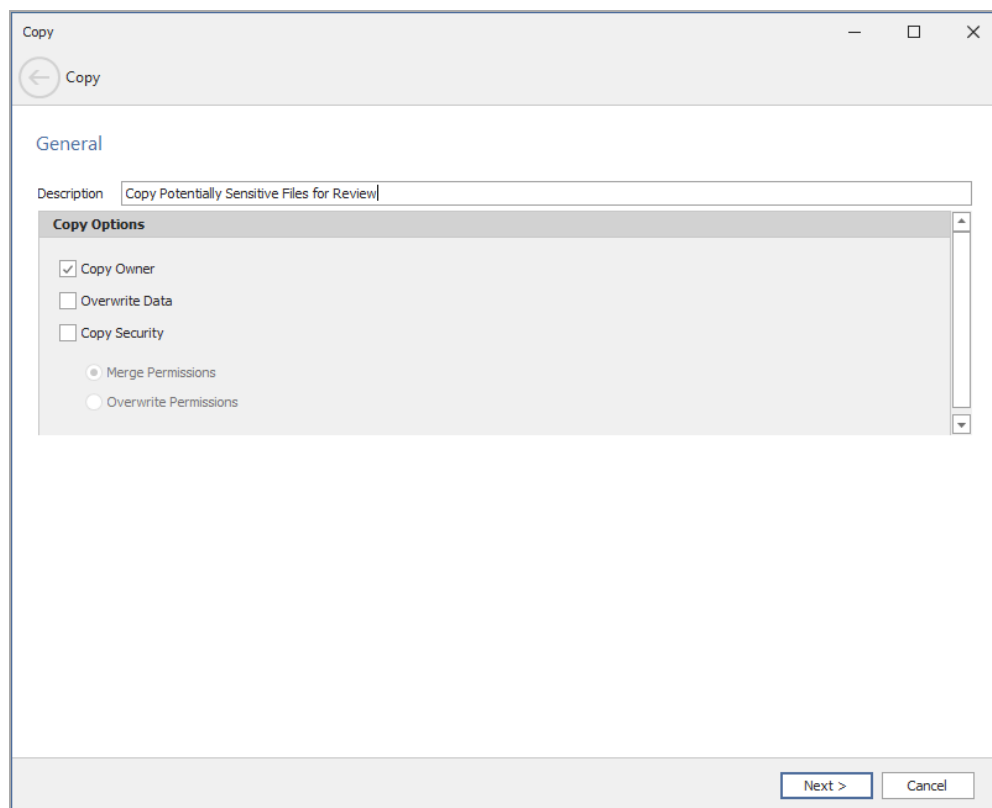
1. In the *Description* field, specify the purpose of the copy operation and click *Next*.
2. In the *Copy Options* region, specify any of the applicable options.

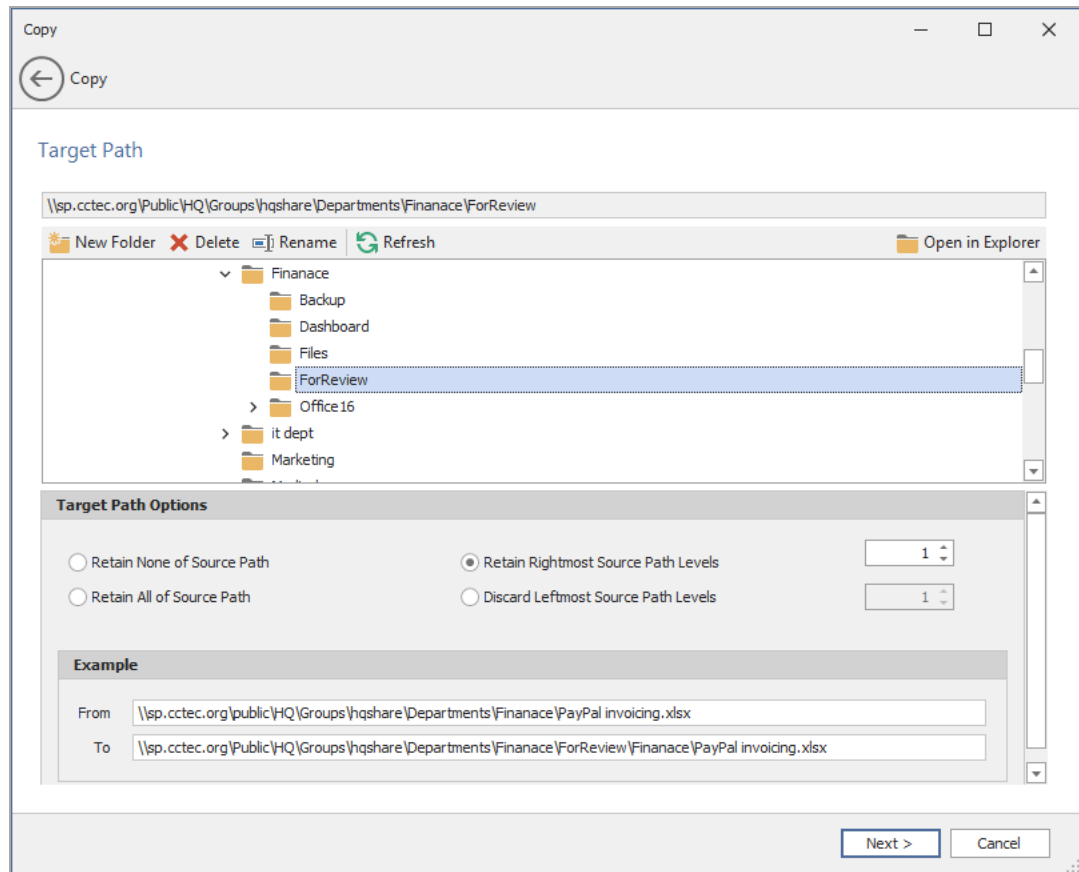
Copy Owner: Selecting this check box maintains the ownership information of the copied files. If this is not selected, the Proxy Rights group becomes the owner.

Overwrite Data: When there is a naming conflict between files, this option allows you to overwrite the existing file with the one being copied.

Copy Security: Selecting this check box maintains the security settings for the copied files. If this is not selected, the copied files inherit the security of the network file system location to where they are copied.

- **Merge Permissions:** Merges permissions from the source to the target if the target contains permissions that are not present in the source. This applies to all folders and files in the source folder structure.
- **Overwrite Permissions:** Overwrites permissions in the target with those found in the source. This applies to all folders and files in the target folder structure.



3. Click *Next*.

4. In the upper pane, browse to specify the location where the files will be copied.

5. In the *Target Path Options* region, select one of the following:

- **Retain None of Source Path:** Copies files to the specified location without creating any subdirectories to store the copied files.

For example, if you were copying files from the following location:

\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data

to

\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc
e

The copied files would be located in the Gnance folder where other files might be located.

- **Retain Rightmost Source Path Levels:** This option copies the files to a location according to the number of levels you specify.

For example, if you were copying files from the following location:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data
```

to

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e
```

and you select *Retain Rightmost Source Path Levels* and specify 1,

the files would be copied to a new folder one level deeper in the path.

The name of the new folder comes from the folder name one level higher in the current file path. So the files would be copied to:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e\Data
```

- **Retain All of Source Path:** This option copies the files to a subdirectory in the specified folder using a duplicate path where the files are stored.

For example, if you were copying files from the following location:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data
```

to

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e
```

the files would be copied to:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\
```

- **Discard Leftmost Source Path Levels:** This option copies files to a subdirectory in the specified folder, based on the path where the files are stored, and the specified levels in the leftmost portion of the file path that you discard.

For example, if you were copying files from the following location:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data
```


to

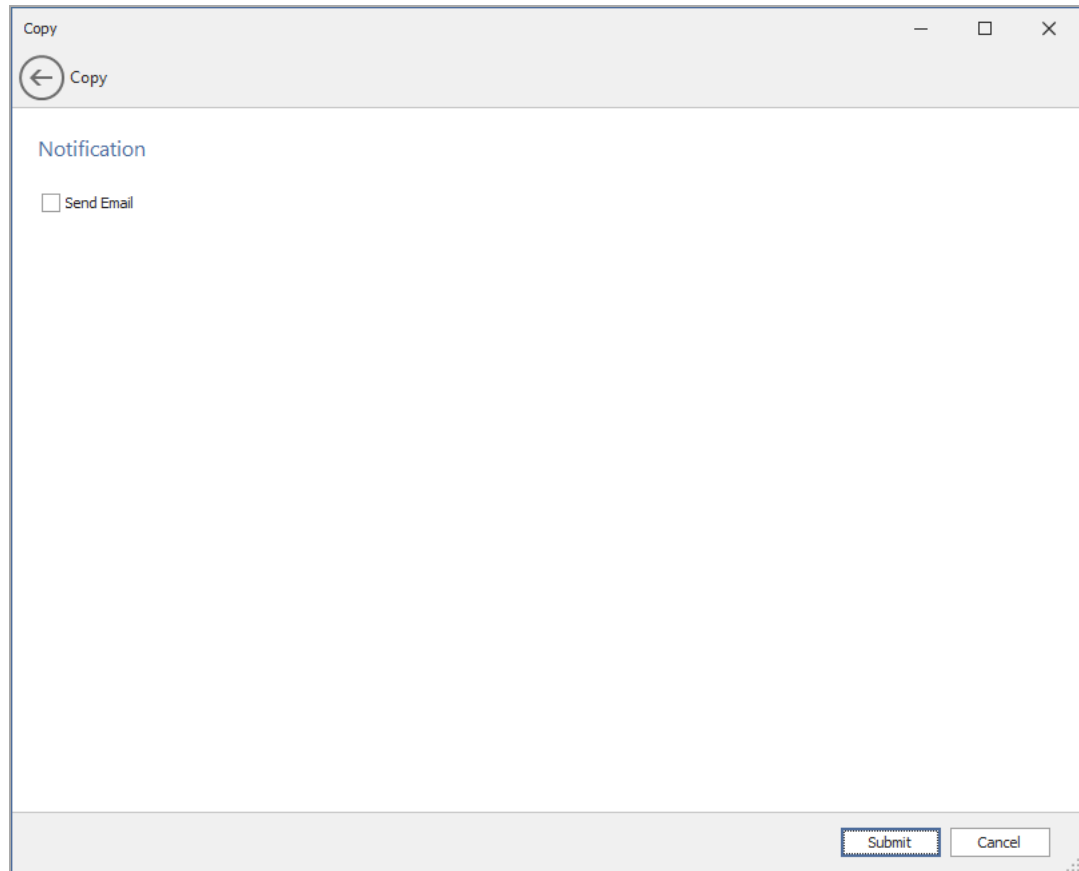
```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e
```

and you select *Discard Leftmost Source Path Levels* and specify 2, the files would be copied to:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e\HQ\HQSHARE\Finance\Data\
```

The fields in the *Example* region will specify where files will be copied according to the options you select.

6. Click *Next*.



Copy

← Copy

Notification

☐ Send Email

Submit Cancel

7. (Optional) If you want an email notification sent to someone once the files have been copied, specify the recipients and the email message in the fields provided.

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Copy

← Copy

Notification

☒ Send Email

Email

To Comma or semicolon separated email addresses

Cc Comma or semicolon separated email addresses

Subject Copy Potentially Sensitive Files for Review

(Optional) A default message will be provided when the job is complete.

Submit Cancel

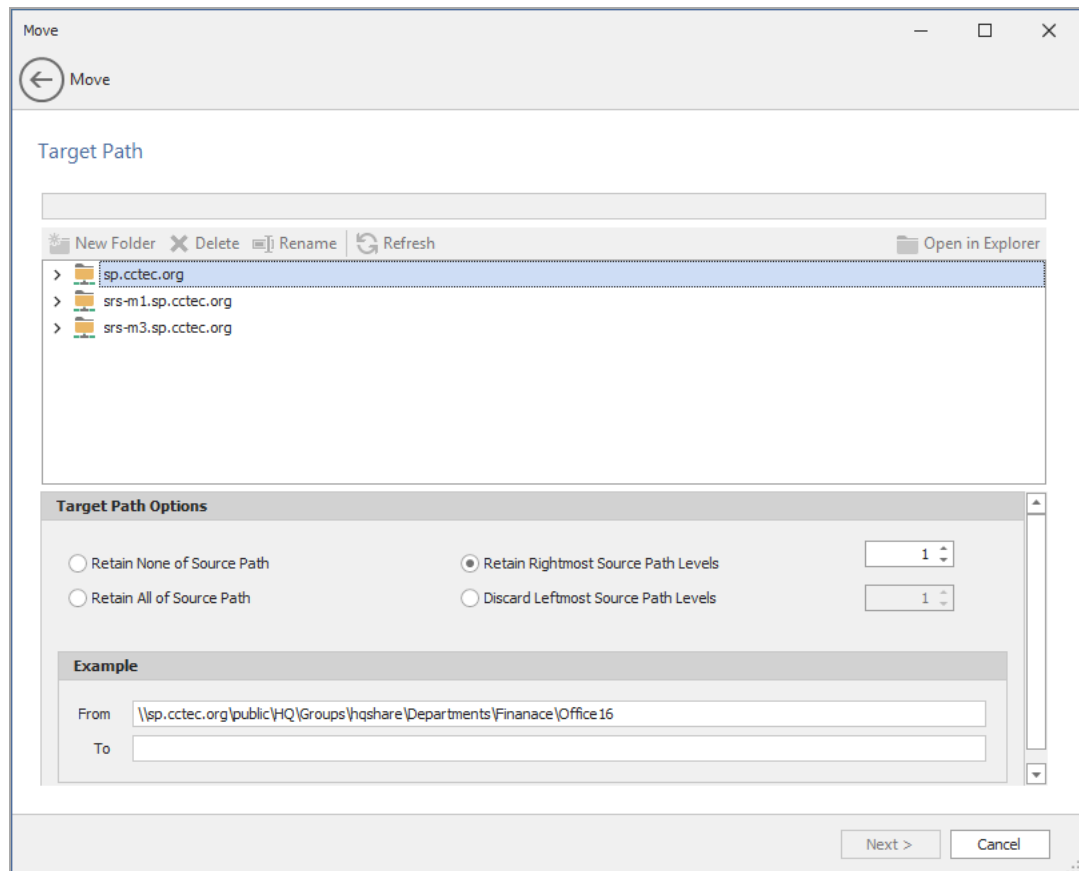
8.

9. Click *Submit*.

2.4.3 - Move

This option moves files specified in each of the entries you select to a new a location where the Data Owner has been granted access via a Workload policy.

1. In the *Description* field, specify the purpose of the move operation and click *Next*.



2. In the upper pane, browse to specify the location where the files will be moved.
3. In the *Target Path Options* region, select one of the following:

- **Retain None of Source Path:** Moves files to the specified location without creating any subdirectories to store the moved files.

For example, if you were moving files from the following location:

`\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data`

to

`\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc
e`

The moved files would be located in the `Gnance` folder where other files might be located.

- **Retain Rightmost Source Path Levels:** This option moves the files to a location according to the number of levels you specify.

For example, if you were moving files from the following location:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data
```

to

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e
```

and you select *Retain Rightmost Source Path Levels* and specify 1,

the files would be moved to a new folder one level deeper in the path. The name of the new folder comes from the folder name one level higher in the current file path. So the files would be moved to:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e\Data
```

- **Retain All of Source Path:** This option moves the files to a subdirectory in the specified folder using a duplicate path where the files are stored.

For example, if you were moving files from the following location:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data
```

to

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e
```

the files would be moved to:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\
```

- **Discard Leftmost Source Path Levels:** This option moves files to a subdirectory in the specified folder, based on the path where the files are stored, and the specified levels in the leftmost portion of the file path that you discard.

For example, if you were moving files from the following location:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data
```

to

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e
```

and you select *Discard Leftmost Source Path Levels* and specify 2,

the files would be moved to:

```
\\sp.cctec.org\Public\HQ\HQSHARE\Finance\Data\Gnanc  
e\HQ\HQSHARE\Finance\Data\
```

The fields in the *Example* region will specify where files will be moved according to the options you select.

4. Click *Next*.
5. (Optional) If you want an email notification sent to someone once the files have been moved, specify the recipients and the email message in the fields provided.
6. Click *Submit*.

2.4.4 - Delete

This option deletes files and folders specified in each of the entries you select.

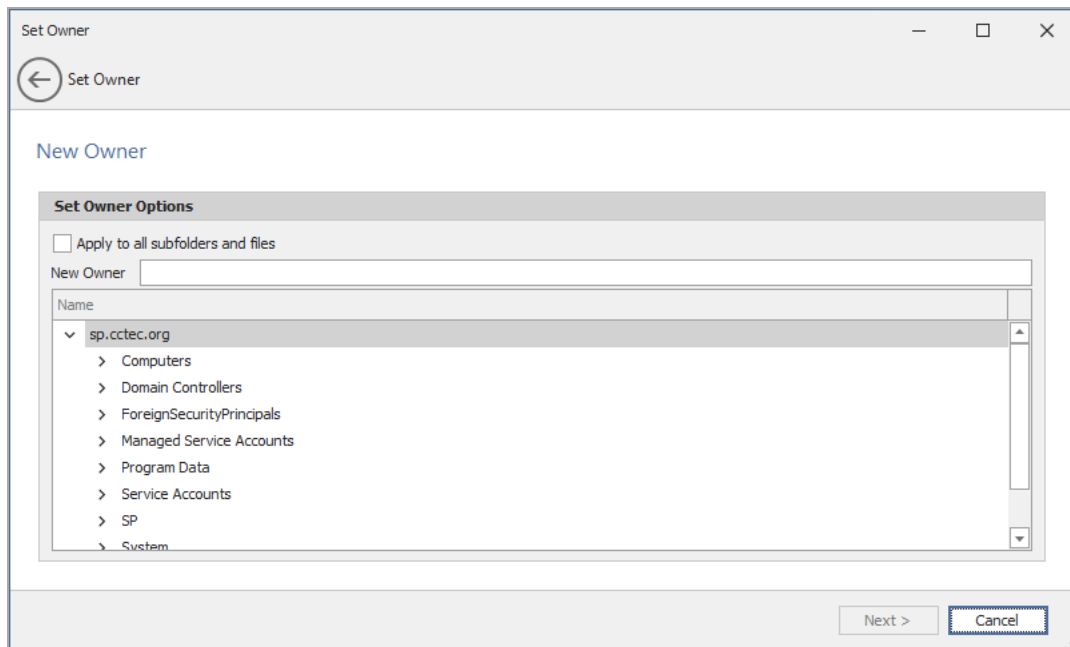
1. In the *Description* field, specify the purpose of the delete operation and click *Next*.
2. (Optional) If you want an email notification sent to someone once the files have been deleted, specify the recipients and the email message in the fields provided.
3. Click *Submit*.

2.4.5 - Set Owner

This option allows the Data Owner to change the ownership of selected folders.

1. In the *Description* field, specify the purpose of the Set Owner operation and click *Next*.

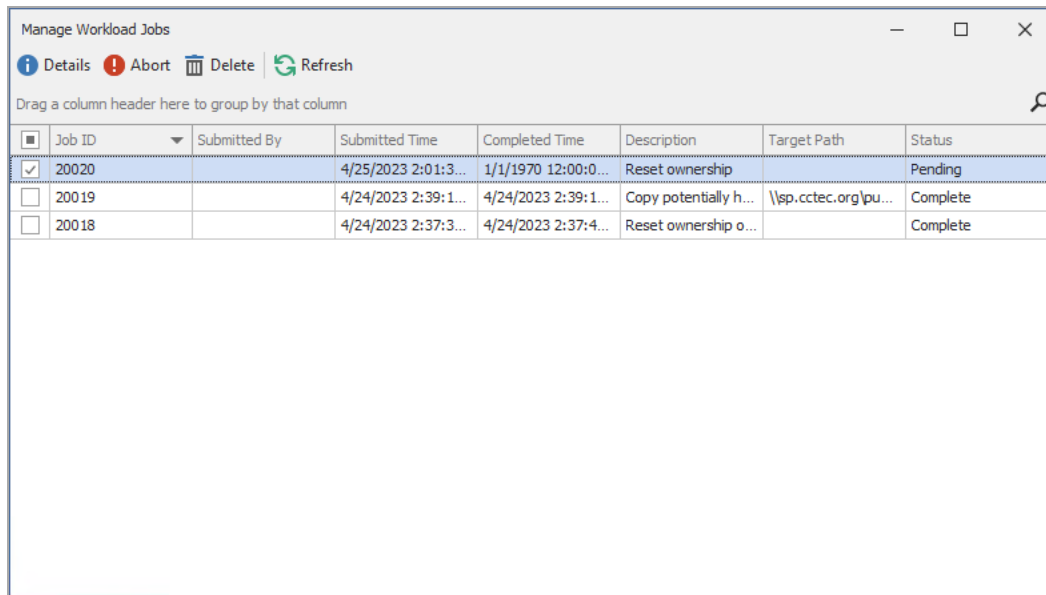
2 - Desktop Client



2. Specify the new owner by either typing the username or locating the User object.
 - a. Click *Apply to Subfolders* if you want the user you specify to be the owner of all of the folder's subfolders.
3. Click *Next*.
4. (Optional) If you want an email notification sent to someone once the file ownership has been changed, specify the recipients and the email message in the fields provided.
5. Click *Submit*.

2.4.6 - Managing Workload Jobs

Clicking the *Jobs* tile brings up a list of Workload jobs.



The screenshot shows a window titled "Manage Workload Jobs" with a toolbar containing "Details", "Abort", "Delete", and "Refresh" buttons. Below the toolbar is a search bar and a table of jobs. The table has columns for Job ID, Submitted By, Submitted Time, Completed Time, Description, Target Path, and Status. Three jobs are listed: Job ID 20020 (Pending), Job ID 20019 (Complete), and Job ID 20018 (Complete). The first job is selected.

<input type="checkbox"/>	Job ID	Submitted By	Submitted Time	Completed Time	Description	Target Path	Status
<input checked="" type="checkbox"/>	20020		4/25/2023 2:01:3...	1/1/1970 12:00:0...	Reset ownership		Pending
<input type="checkbox"/>	20019		4/24/2023 2:39:1...	4/24/2023 2:39:1...	Copy potentially h...	\\sp.cctec.org\pu...	Complete
<input type="checkbox"/>	20018		4/24/2023 2:37:3...	4/24/2023 2:37:4...	Reset ownership o...		Complete

From here, you can double-click a job to see more details, abort a pending job, or remove jobs from the list.

If you're a member of the File Dynamics Admins group, you will see the jobs for all users. If you are a regular user, you will see only the jobs that you have submitted.

3 - Web Client

The Data Owner Web Client is web application that may be accessed by assigned Data Owners via a modern web browser. Select the desktop client the following applies to you as a Data Owner or systems administrator:

- You do not manage data via Epoch Data Protection policies
- You require or prefer web based access over installing a desktop client.
- You require access to the Data Owner functions from a system other than Windows

See the following for details on using the Data Owner Web Client:

3.1 - Accessing the Data Owner Service

To access the Data Owner web service:

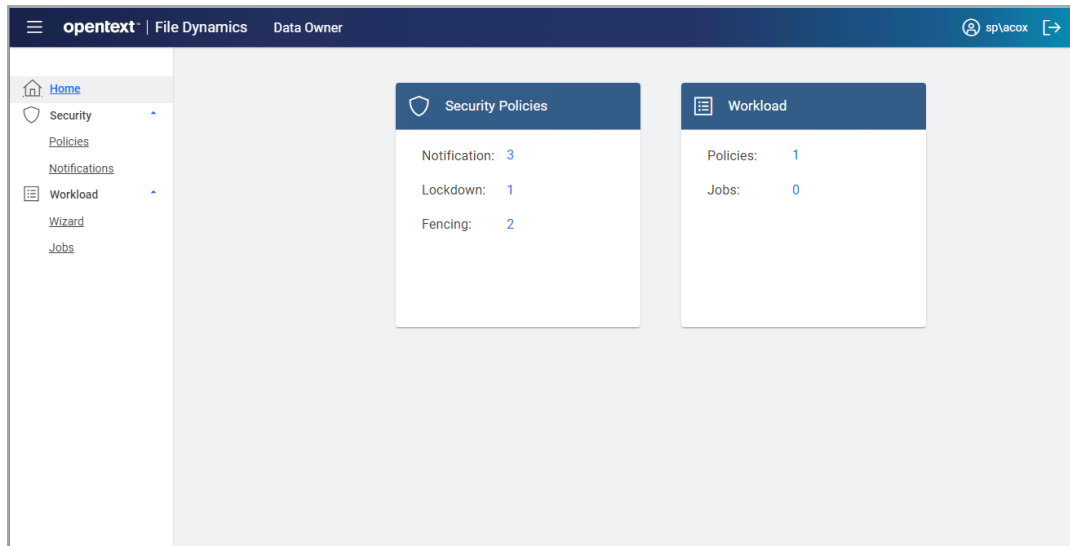
1. In a web browser, go to the Data Owner web service URL provided by your administrator. For example, <https://dataowner.sp.cctec.org:3079>.


2. Enter your Active Directory username and password. The username may be entered using *Domain\Account* or User Principal Name (UPN) format.

For example, *SP\acox* or *acox@sp.cctec.org*.

3. Click **Sign In** to authenticate.

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4. After initial login, the Home page will appear showing basic counts for Security Policies and Workload jobs.
5. Proceed to manage either [Security Notifications and Actions \(page 42\)](#) or [Workload Actions \(page 50\)](#).
6. To sign out, click the sign out link  in the header.

3.2 - Security Notifications and Actions

The *Security* region of the Data Owner Client provides the means of getting notifications when access permissions for specified target paths have changed, viewing reports, and when authorized to do so, disabling and enabling a policy.

3.2.1 - Viewing Security Policies

1. Click *Security > Policies* to view a list of Security policies to which you have been assigned as a Data Owner.

The screenshot shows the 'opentext | File Dynamics Data Owner' web interface. On the left is a navigation menu with 'Home', 'Security', 'Policies' (selected), 'Notifications', 'Workload', 'Wizard', and 'Jobs'. The main area has a 'REFRESH' button and a text prompt 'Drag a column header here to group by that column'. Below this is a table of policies.

Policy Type	Enabled	Policy Name	Policy Target Path
Fencing	<input checked="" type="checkbox"/>	Atlanta Engineering Fenci...	\\sp.cctec.org\Public\Atlanta\Groups\Atlanta Engineering
Fencing	<input checked="" type="checkbox"/>	Atlanta Helpdesk Fencing ...	\\srs-m1.sp.cctec.org\Shares\Atlanta\Groups\Atlanta Helpdesk
Notification	<input checked="" type="checkbox"/>	Atlanta Users Security Not...	\\sp.cctec.org\Public\Atlanta\Home
Notification	<input checked="" type="checkbox"/>	Finance Security Notificati...	\\srs-m1.sp.cctec.org\Shares\HQ\Groups\Finance Dept
Lockdown	<input checked="" type="checkbox"/>	Medical Lockdown Policy	\\srs-m1.sp.cctec.org\Shares\HQ\Groups\Medical
Notification	<input checked="" type="checkbox"/>	Sales Security Notificatio...	\\sp.cctec.org\Public\HQ\Groups\hqshare\Departments\Sales

At the bottom of the table, there is a page indicator '1' and a 'Page Size: 20' dropdown menu.

- Click each listing individually to see if you have been authorized to enable or disable a policy.

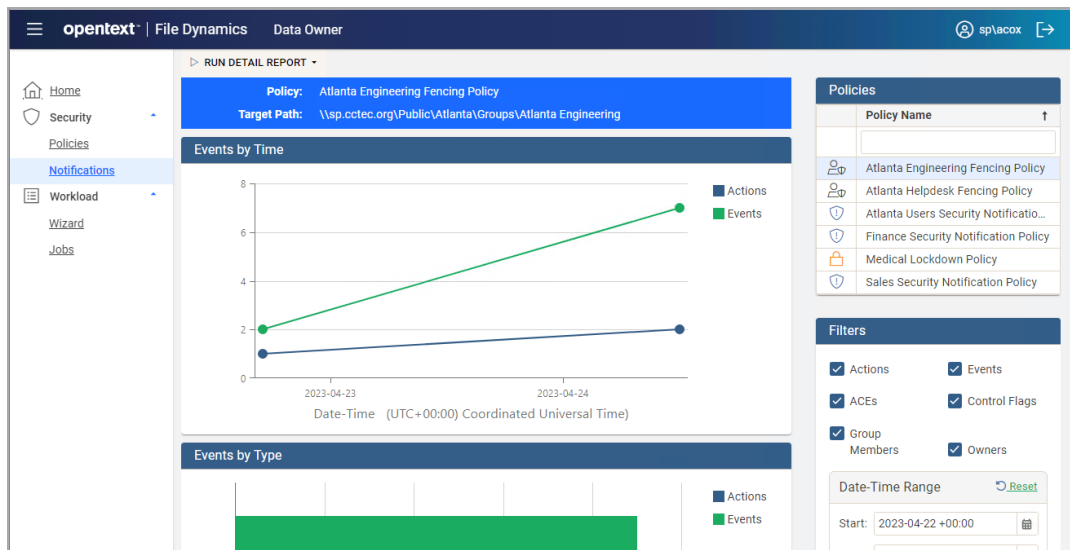
In the graphic above, Amanda Cox is authorized to disable the Medical Lockdown policy.

3.2.2 - Viewing Notifications

Notifications in the Data Owner Client display graphically security-specific events and resulting actions according to the filters you specify. Events take place in the network file system, actions are what File Dynamics did as a result.

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1. Click *Security > Notifications* to access the Security Notifications page.

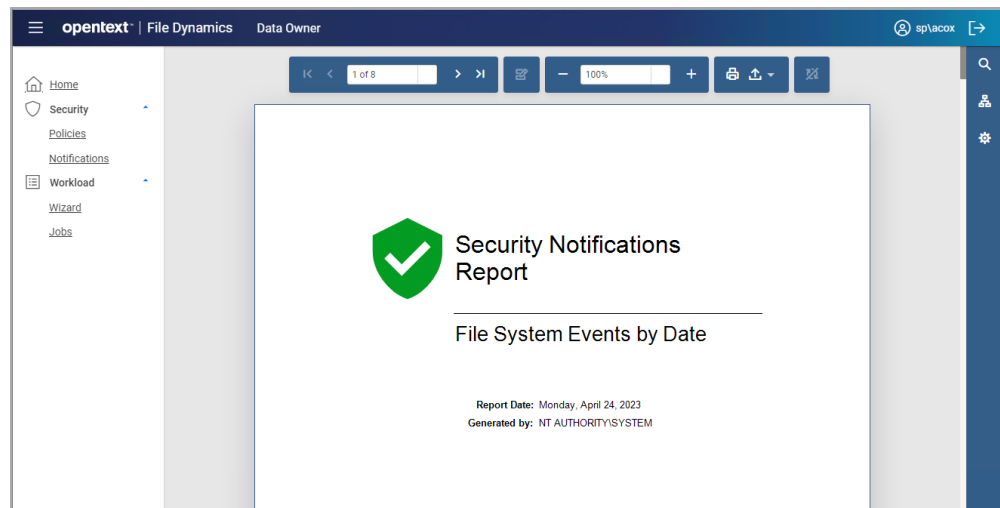


2. From the *Policies* list, select the policy for which you want to see graphical information and reported in the Detail Report.

If the policies are not displayed, you can click *Reload Policies* and select the security policy types to display.

3. From the *Filters* region, specify the options you want displayed in the graphs and reported in the Detail Report.
4. In the same region, specify the date range you want displayed in the graphs and reported in the Detail Report.
5. From the *Run Detail Report* drop-down menu, choose one of the following options:
 - **File System Events:** Generates a preview report of file system events that have taken place within the parameters you have specified in the right-hand portion of the Security Notifications page.
 - **Group Membership Events:** Generates a preview report of group membership events that have taken place within the parameters you have specified in the right-hand portion of the Security Notifications

page.



6. From the report dialog box, export or email the report in the format you want.

3.2.3 - Generating Detail Reports

The Data Owner Client notifies the Data Owner of security changes for target paths through generated reports. The Data Owner Client generates the following reports.

File System Events Reports

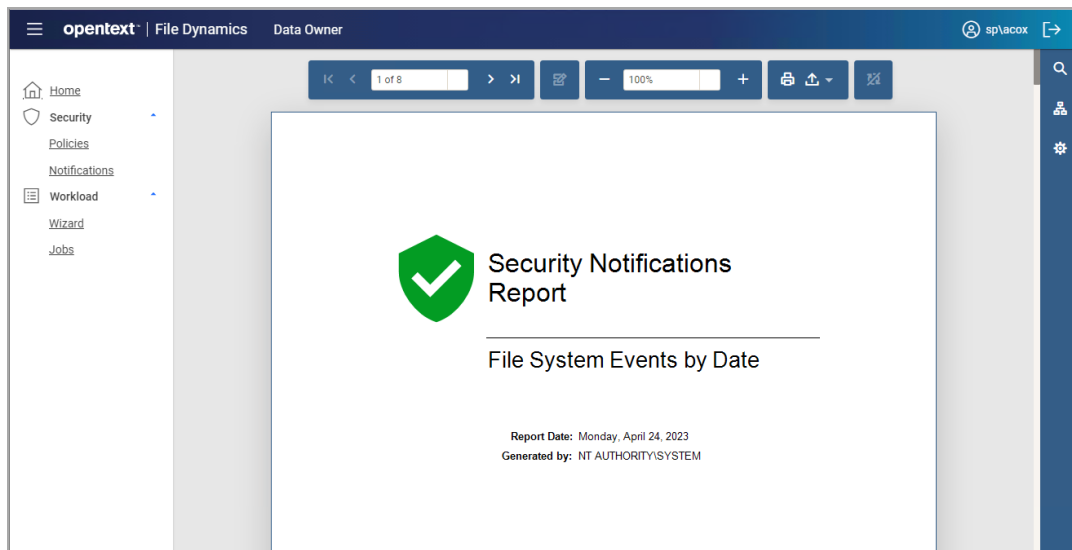
File System Events reports detail the changes in permissions that have taken place within the designated target path.

1. Click *Security > Notifications* to access the Security Notifications page.
2. In the *Filters* region of the page, specify if you want the report to include Events, Actions, or both by selecting the appropriate check boxes.
3. From the *Run Detail Report* drop-down menu, select *File System Events*.

The report is generated in preview mode where it can be printed or saved

3 - Web Client

into a variety of formats.

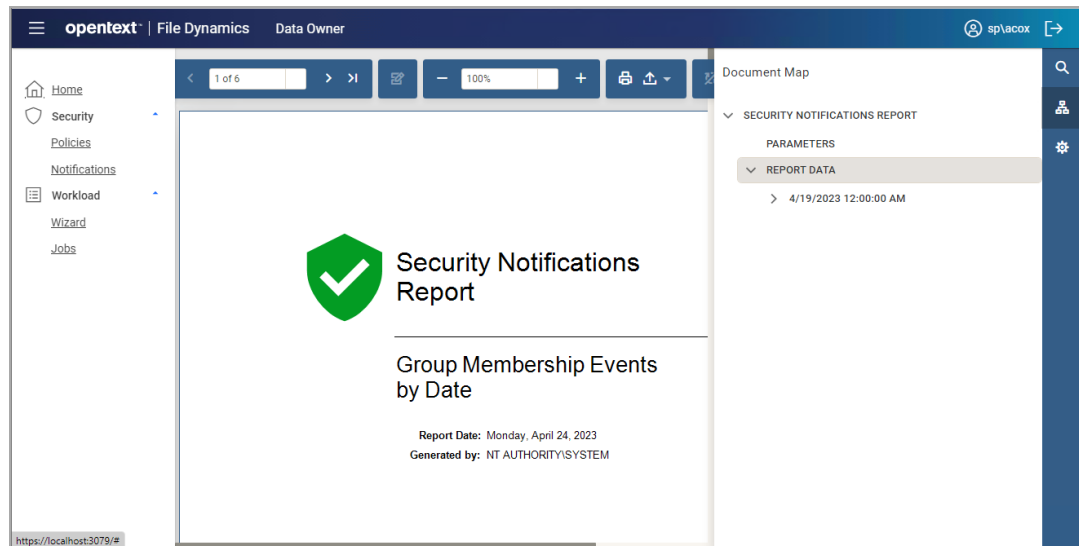


Group Membership Events Reports

Group Membership Events reports detail the changes in group memberships that have taken place for groups that have access to the designated target path.

1. Click *Security > Notifications* to access the Security Notifications page.
2. In the *Filters* region of the page, specify if you want the report to include Events, Actions, or both by selecting the appropriate check boxes.
3. From the *Run Detail Report* drop-down menu, select *Group Membership Events*.

The report is generated in preview mode where it can be printed or saved into a variety of formats.



3.2.4 - Disabling a Policy

Data Owners authorized to disable a policy will normally do so when access permissions to a high-value target need to be temporarily overridden or modified.

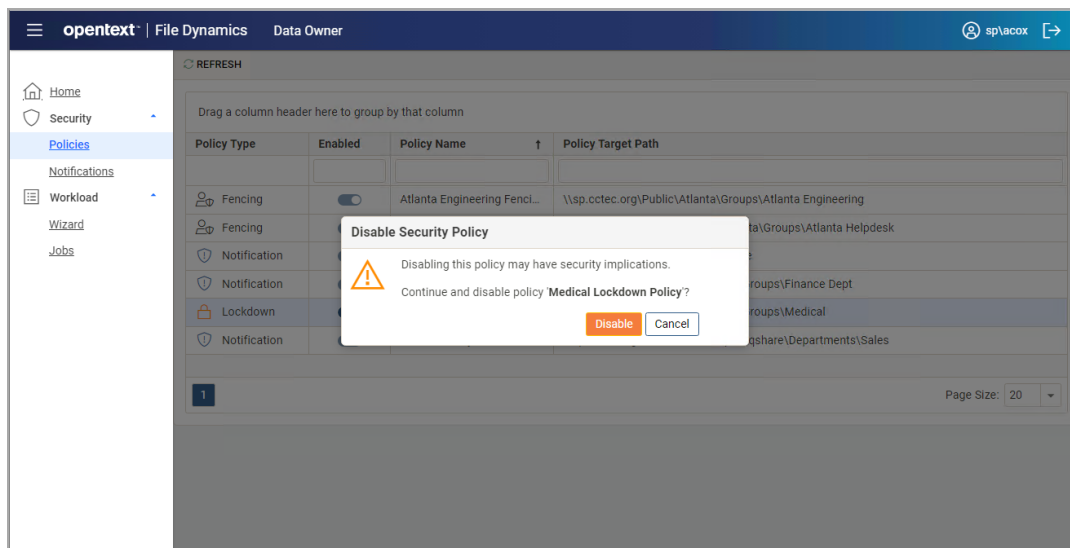
Disabling a policy stops all scheduled security scans until it is enabled.

A Data Owner that has been authorized to disable a policy is also authorized to enable a policy.

1. From the list of security policies, click toggle button of the enabled policy you wish to disable.

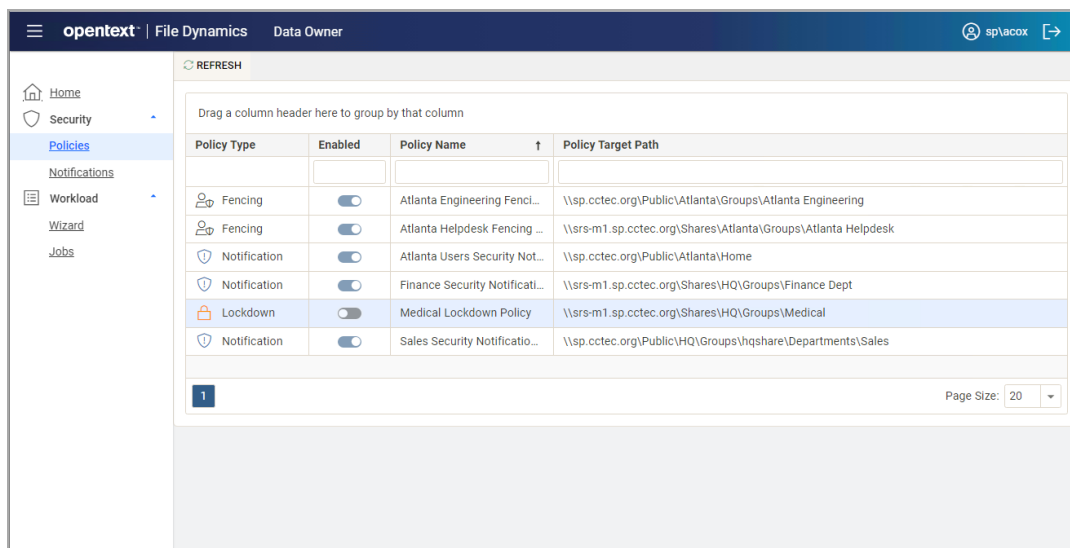
3 - Web Client

The following dialog box appears:



2. Click *Disable*.

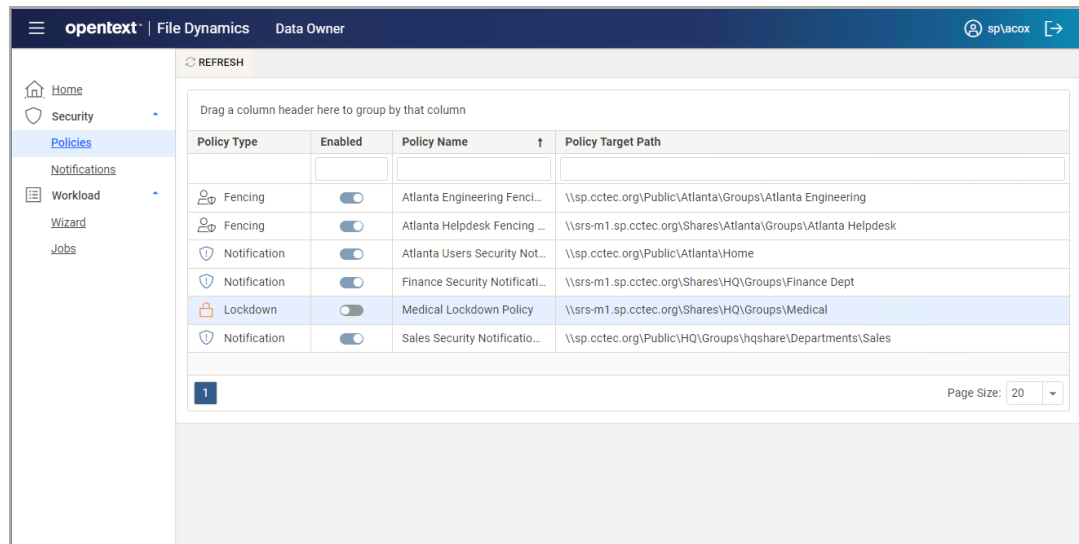
The policy is displayed as disabled.



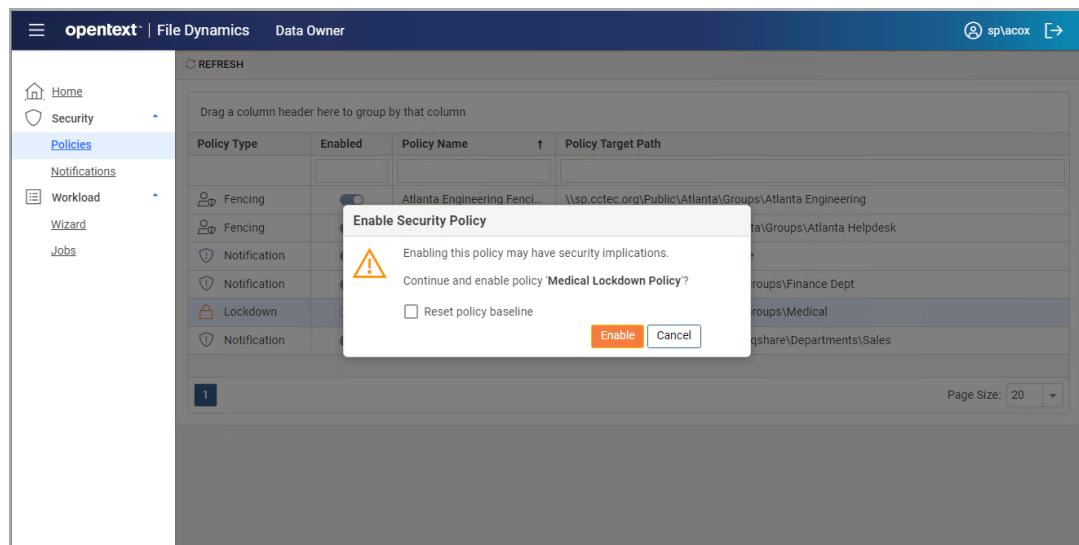
3.2.5 - Enabling a Policy

Once the IT department has concluded its need for disabling the policy, an authorized Data Owner can enable the policy using the Data Owner Client.

1. From the list of security policies, click toggle button of the disabled policy you wish to enable.



The following dialog box appears:



2. Do one of the following:
 - If you want to keep the original baseline permissions for the target path before the policy was disabled, click *Enable*.

3 - Web Client

- If you want establish the new permissions specified in the policy for the target path, select the *Reset* policy baseline check box and click *Enable*.

This option removes previous security scans from the database and initiates a new security scan that will serve as the baseline.

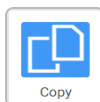
3.3 - Workload Actions

Workload policies in File Dynamics provide the ability to handle work processes initiated from other applications. For example, reports generated in OpenText OpenText File Dynamics that specify the location of sensitive files can be imported into the Data Owner Client where a designated Data Owner can remediate the location of these sensitive files. This approach empowers organizations to provide automated network file system security remediation approved by a gatekeeper familiar with the files.

Imported files can be in either CSV or TXT format.

3.3.1 - Running Workload Jobs

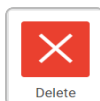
1. Click *Workload > Wizard*.
2. Click the desired operation to start the associated wizard:



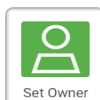
Copy (page 50): copy one or more paths to a designated target path



Move (page 54): move one or more paths to a designated target path



Delete (page 56): delete one or more paths

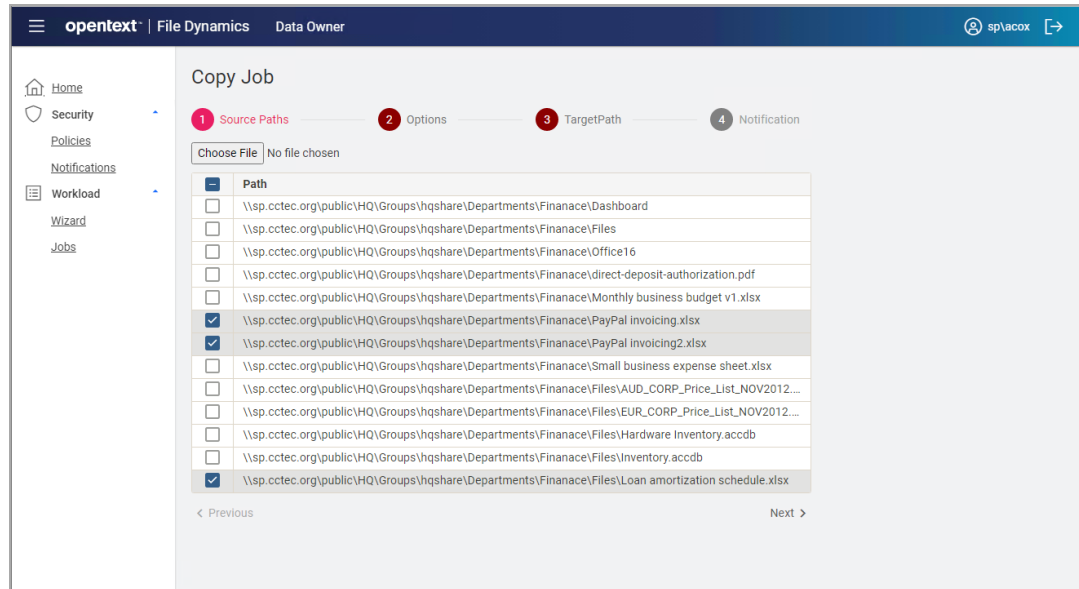


Set Owner (page 59): set the owner for one or more paths

3.3.2 - Copy

This option copies selected entries to a designated target path.

1. From the Data Owner web client, select *Workload > Wizard > Copy*.



2. Click *Choose File* and select a paths import file.



NOTE: Currently, only a plain-text file with a list of UNC paths, one per line, is supported. CSV file support will be added in a future update.

3. Select one or more source paths from the list that you wish to copy.
4. Click *Next*.

3 - Web Client

The screenshot shows the 'Copy Job' wizard in the OpenText File Dynamics Data Owner interface. The wizard has four steps: 1. Source Paths, 2. Options (current step), 3. TargetPath, and 4. Notification. The 'Options' step contains the following fields and controls:

- Description:** A text area with the value 'Copy Potentially Sensitive File For Review'.
- Copy Owner:** A checked checkbox.
- Overwrite Data:** An unchecked checkbox.
- Copy Security:** A checked checkbox, with two radio button options: 'Merge Permissions' (selected) and 'Overwrite Permissions'.

Navigation buttons at the bottom include '< Previous' and 'Next >'.

5. In the *Options* panel, specify any of the applicable options.

- **Description:** enter a description for this job. This is a required field.
- **Copy Owner:** Selecting this check box maintains the ownership information of the copied files. If this is not selected, the Proxy Rights group becomes the owner.
- **Overwrite Data:** When there is a naming conflict between files, this option allows you to overwrite the existing file with the one being copied.
- **Copy Security:** Selecting this check box maintains the security settings for the copied files. If this is not selected, the copied files inherit the security of the network file system location to where they are copied.
- **Merge Permissions:** Merges permissions from the source to the target if the target contains permissions that are not present in the source. This applies to all folders and files in the source folder structure.
- **Overwrite Permissions:** Overwrites permissions in the target with those found in the source. This applies to all folders and files in the target folder structure.

6. Click *Next*.

The screenshot shows the 'Copy Job' wizard in the opentext File Dynamics web client. The wizard is at the 'TargetPath' step (3 of 4). The 'Target Path' field contains a UNC path and is marked as 'Valid'. Navigation buttons 'Previous' and 'Next' are visible.

7. In the *Target Path*, enter a valid UNC path where the files will be copied.8. (Optional) Click **Validate** to validate the entered target path. Note that changing focus from the *Target Path* field will also auto-validate this path.9. Click *Next*.

The screenshot shows the 'Copy Job' wizard in the opentext File Dynamics web client. The wizard is at the 'Notification' step (4 of 4). The 'Send Email' checkbox is checked. The 'Email' form has fields for 'To', 'Cc', 'Subject', and 'Message'. A 'Submit Job' button is visible. Navigation buttons 'Previous' and 'Next' are visible.

3 - Web Client

10. (Optional) If you want an email notification sent to someone once the files have been copied, check the check box for **Send Email** and then specify the recipients and the email message in the fields provided.
11. Click *Submit Job*.

3.3.3 - Move

This option moves selected entries to a designated target path.

1. From the Data Owner web client, select *Workload > Wizard > Move*.

Path	
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Dashboard	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files	<input checked="" type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Office16	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\direct-deposit-authorization.pdf	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Monthly business budget v1.xlsx	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\PayPal Invoicing.xlsx	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\PayPal Invoicing2.xlsx	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Small business expense sheet.xlsx	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\AUD_CORP_Price_List_NOV2012...	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\EUR_CORP_Price_List_NOV2012...	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\Hardware Inventory.accdb	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\Inventory.accdb	<input type="checkbox"/>
\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\Loan amortization schedule.xlsx	<input type="checkbox"/>

2. Click *Choose File* and select a paths import file.



NOTE: Currently, only a plain-text file with a list of UNC paths, one per line, is supported. CSV file support will be added in a future update.

3. Select one or more source paths from the list that you wish to move.
4. Click *Next*.

opentext | File Dynamics Data Owner sp\vacox

Home Security Policies Notifications Workload Wizard Jobs

Move Job

1 Source Paths 2 Options 3 TargetPath 4 Notification

Description: Move files for backup, before they get overwritten

< Previous Next >

5. In the *Options* panel, specify any of the applicable options.

- **Description:** enter a description for this job. This is a required field.

6. Click *Next*.

opentext | File Dynamics Data Owner sp\vacox

Home Security Policies Notifications Workload Wizard Jobs

Move Job

1 Source Paths 2 Options 3 TargetPath 4 Notification

Target Path: \\sp.cctec.org\public\HQ\Groups\hqshare\Departments\Finan... Validate

✓ Valid

< Previous Next >

7. In the *Target Path*, enter a valid UNC path where the files will be copied.

3 - Web Client

8. (Optional) Click **Validate** to validate the entered target path. Note that changing focus from the *Target Path* field will also auto-validate this path.

The screenshot displays the 'Move Job' wizard in the OpenText File Dynamics web client. The top navigation bar includes the OpenText logo, 'File Dynamics', 'Data Owner', and a user profile 'sp\vacox'. The left sidebar contains a menu with 'Home', 'Security', 'Policies', 'Notifications', 'Workload', 'Wizard', and 'Jobs'. The main content area shows the 'Move Job' wizard with a progress bar indicating four steps: 1. Source Paths, 2. Options, 3. TargetPath, and 4. Notification. The 'Notification' step is currently active. Below the progress bar, there is a 'Send Email' checkbox and an 'Email' form with fields for 'To', 'Cc', 'Subject', and 'Message'. The 'Submit Job' button is at the bottom left, and 'Previous' and 'Next' navigation links are at the bottom center.

9. (Optional) If you want an email notification sent to someone once the files have been moved, check the check box for **Send Email** and then specify the recipients and the email message in the fields provided.
10. Click *Submit Job*.

3.3.4 - Delete

This option deletes selected file and folder entries.

1. From the Data Owner web client, select *Workload > Wizard > Delete*.

opentext | File Dynamics Data Owner sp\acox

Home Security Policies Notifications Workload Wizard Jobs

Delete

1 Target Paths 2 Options 3 Notification

Choose File filelist.txt

	Path
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Dashboard
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Office16
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\direct-deposit-authorization.pdf
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Monthly business budget v1.xlsx
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\PayPal Invoicing.xlsx
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\PayPal Invoicing2.xlsx
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Small business expense sheet.xlsx
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\AUD_CORP_Price_List_NOV2012...
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\EUR_CORP_Price_List_NOV2012...
<input checked="" type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\Hardware Inventory.accdb
<input checked="" type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\Inventory.accdb
<input type="checkbox"/>	\\sp.cctec.org\\public\\HQ\\Groups\\hqshare\\Departments\\Finance\\Files\\Loan amortization schedule.xlsx

< Previous Next >

2. Click *Choose File* and select a paths import file.



NOTE: Currently, only a plain-text file with a list of UNC paths, one per line, is supported. CSV file support will be added in a future update.

3. Select one or more source paths from the list that you wish to delete.
4. Click *Next*.

3 - Web Client

The screenshot shows the 'Delete' wizard in the OpenText File Dynamics web client. The interface has a dark blue header with the OpenText logo, 'File Dynamics', and 'Data Owner' tabs. A user profile 'splacox' is in the top right. A left sidebar contains navigation links: Home, Security, Policies, Notifications, Workload, Wizard, and Jobs. The main area is titled 'Delete' and features a progress bar with three steps: 1 Target Paths, 2 Options (current), and 3 Notification. Below the progress bar is a 'Description' text area. At the bottom are '< Previous' and 'Next >' navigation buttons.

5. In the *Options* panel, specify any of the applicable options.

- **Description:** enter a description for this job. This is a required field.

6. Click *Next*.

The screenshot shows the 'Delete' wizard in the OpenText File Dynamics web client, now at the 'Notification' step. The progress bar shows steps 1 Target Paths, 2 Options, and 3 Notification (current). Below the progress bar is a 'Send Email' checkbox. If checked, an 'Email' form is displayed with fields for 'To', 'Cc', 'Subject', and a 'Message' text area. Each email field has a placeholder: 'Enter one or more email addresses separated by comma or semicolon'. A blue 'Submit Job' button is located below the email form. At the bottom are '< Previous' and 'Next >' navigation buttons.

7. (Optional) If you want an email notification sent to someone once the files have been deleted, check the check box for **Send Email** and then specify the

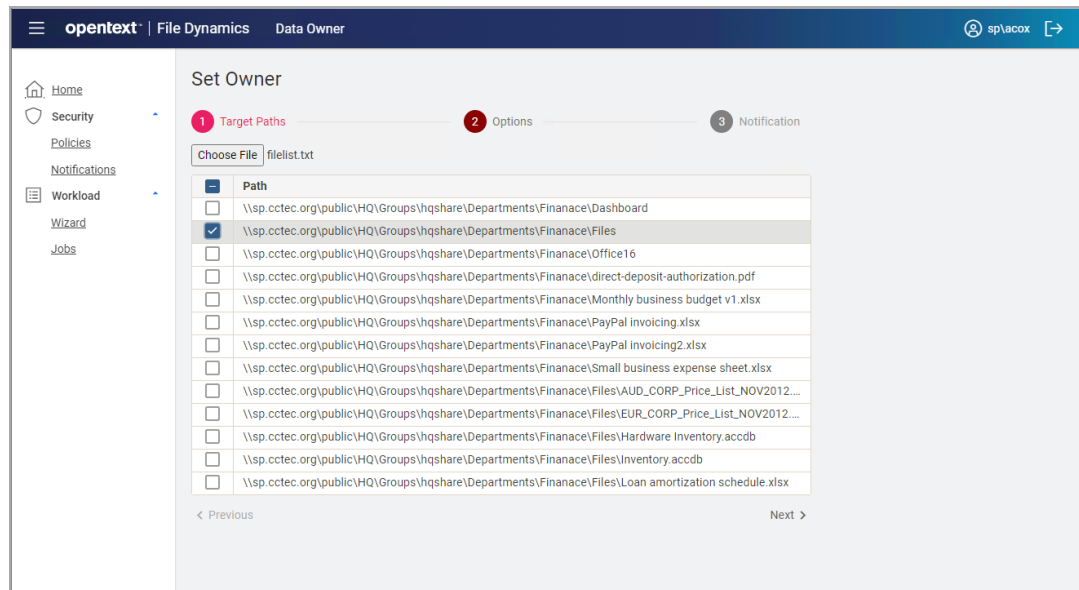
recipients and the email message in the fields provided.

8. Click *Submit Job*.

3.3.5 - Set Owner

This option sets the owner for selected file and folder entries.

1. From the Data Owner web client, select *Workload > Wizard > Set Owner*.



2. Click *Choose File* and select a paths import file.



NOTE: Currently, only a plain-text file with a list of UNC paths, one per line, is supported. CSV file support will be added in a future update.

3. Select one or more source paths from the list for which you wish to modify the owner.
4. Click *Next*.

3 - Web Client

The screenshot shows the 'Set Owner' wizard in the opentext File Dynamics Data Owner web client. The interface includes a sidebar with navigation links: Home, Security, Policies, Notifications, Workload, Wizard, and Jobs. The main content area displays the 'Set Owner' wizard with three steps: 1. Target Paths, 2. Options (current step), and 3. Notification. The 'Options' step contains a 'Description' field with the text 'Reset ownership of file to new manager', a checked checkbox for 'Apply to all subfolders and files', and a 'New Owner' field with the text 'Username in Domain/S/'. Navigation buttons for '< Previous' and 'Next >' are located at the bottom of the wizard.

5. In the *Options* panel, specify any of the applicable options.

- **Description:** enter a description for this job. This is a required field.
- **Apply to all subfolder and files:** Select this check box to apply the specified owner to all subfolders and files of each path.
- **New Owner:** Enter the new owner using Domain\Account format such as BUILTIN\Administrators or SP\acox or by using a valid Security Identifier (SID) such as S-1-5-32-544.

6. Click *Next*.

opentext | File Dynamics Data Owner

Home Security Policies Notifications Workload Wizard Jobs

Set Owner

1 Target Paths 2 Options 3 Notification

Send Email ☐

Email

To

Cc

Subject

Message

Submit Job

< Previous Next >

- (Optional) If you want an email notification sent to someone once the file and folder owners have been updated, check the check box for **Send Email** and then specify the recipients and the email message in the fields provided.

- Click *Submit Job*.

3.3.6 - Managing Workload Jobs

From the Data Owner web client, select *Workload* > *Jobs* to bring up the list of Workload jobs.

opentext | File Dynamics Data Owner

Home Security Policies Notifications Workload Wizard Jobs

REFRESH

Drag a column header here to group by that column

	Job Id	Job Type	Owner	Submitted	Completed	Descr...	Target Path	State
Details Delete	20,018	Set DI...	SP\acox	2023-04-24 14:37:31	2023-04-24 14:37:43	Reset ...		Comp...
Details Delete	20,019	Copy ...	SP\acox	2023-04-24 14:39:11	2023-04-24 14:39:13	Copy ...	\\sp.cctec.org\public\HQ\Groups\hqshar...	Comp...

<< < 1 of 1 > >>

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Click the following links for a job to perform actions on that job:

3 - Web Client

- **Details:** displays a detail form for the job
- **Abort:** aborts a currently running job
- **Delete:** deletes the associated job

If you're a member of the File Dynamics Admins group, you will see the jobs for all users. If you are a regular user, you will see only the jobs that you have submitted.