Novell Dynamic File Services 2.0 Retention Review Quick Start

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Retention Review Service

The Novell Dynamic File Services Retention Review Service provides a Web interface for reviewing files in a retention repository. Reviewers determine the disposition of retained files in accordance your company's data retention policy. A reviewer can take no action, delete files from the repository, or move files from the repository back to their original location. This quick start provides an overview of the review process for non-administrator reviewers.

What is a retention pair?

Dynamic File Services links two storage areas to form a *retention pair*:

- **Primary path:** Contains data that is actively used.
- **Secondary path:** Contains a retention repository for data that is no longer actively used.

A retention pair helps you retain older data that is not needed for everyday operations but might occasionally need to be accessed. For example, files in the repository might be kept for historical reference, or to comply with contractual or legal requirements.

Administrator-controlled policies are enforced periodically to move files from the primary path to the repository. The administrator can also use the Manual Move option to move selected folders and files to the repository. The files that are moved during a policy run or manual move are stored in a time-stamped folder. The data structure in the folder is relative to the root of the primary path, and is structurally the same.

Who can perform reviews?

Members of the `Dynamic File Services Retention Review` group can review retention data by using the Retention Review Web interface. Administrator privileges on the server are not required for membership. When reviewers work in the Web interface, they have all of the file access privileges necessary to restore or delete the retained files. They cannot open or use the files.

Contact your administrator if you need to perform retention reviews, and ask to be added as a member of the group.

Can I be notified to perform a review?

The Dynamic File Services administrator configures notifications to be sent periodically to reviewers. The notification schedule is based on your company's retention review policy. The message contains a URL to the data retention repository and information about the original location of the data.

Notifications can be sent to an e-mail address or to a Twitter account that has been configured to receive notices. Contact your administrator if you want to receive notifications about retention reviews.

Accessing the Retention Review Web Interface

The Retention Review Web interface is available on the server where Dynamic File Services is installed and running. Reviewers can access the review site via a Web browser.

Before you begin a retention review session, modify your Web browser settings to allow pop-up messages for the target site.

The Retention Review Notification message provides a link to the Web interface for a specific retention pair. The connection is made via the secure HTTP protocol (HTTPS). The URL is in the form:

```
https://<ndfs_ip_or_dns_name>:<ndfs_port>/
folders.html?pair=<retention_pair_name>
```

To access the Retention Review site:

1 Launch a Web browser, then click the link in the Review Notification message to open the Retention Review Web interface.

You can also copy the URL and paste it in the Location field of your Web browser.

2 If you are prompted to do so, accept and install the Dynamic File Services certificate in your Local Computer certificate store.

3 In the *Login* dialog box, type your username and password, then click *OK*.

In an Active Directory domain, use your domain credentials. In a Workgroup, use your server credentials for the target server.

On successful login, the *Retention Review Folders* list is displayed.

Access is denied if the login identity is not an authorized reviewer. Make sure your username is added as a reviewer in the `Dynamic File Services Retention Review` group, then try again. To log in with a different identity, clear the browser cache to remove your old credentials, then refresh the Retention Review page to access the *Login* dialog box.

Navigating the Retention Repository

A Dynamic File Services retention pair stores retained data in retention review folders. Each folder contain a set of files that were moved in a single policy run or a manual run for the primary location in a retention pair. A review folder's name includes the date and time of that policy run.

The data structure in a review folder is relative to the root of the primary path, and is structurally the same. You can click a folder's name link to navigate down through the file tree. The path for the *Review Folder* is displayed at the top of the page to help you keep track of where you are in the structure. You can click a previous directory in the path to navigate back up the tree, or you can click any directory in the path to jump directly to it. Click the pair name to return to the top of its repository.

Folders and files in the structure are paged to display 1000 entries at a time. The files are listed alphabetically as you might see them in a Windows Explorer browser, with the folders grouped above the files. Use the *Next* and *Previous* buttons to move from page to page. Click a page number to jump directly to a page.

For example, the first page displays the first 1000 storage objects in the folder, according to the alphabetical listing in the source folder. The second page displays the second 1000 storage objects, and so on.

On each page, the list provides information about the files and folders. Each row includes the name, the type as a file extension or folder, the last date modified, the file owner, and the file size. Folder sizes are not reported (that is, the cell contains "`---`" instead of a value).

Dynamic File Services keeps a database of usernames and their Security Identifiers (SIDs) as files are moved to a retention repository. A strikethrough for an owner name indicates that the username is invalid and no longer exists as a user or group on the server or in the Active Directory domain (if present). If the file is restored to its original location, the NTFS file system sees the SID, but the file is an orphan file without a valid owner. An owner name of *Unknown* indicates that the file was an orphan file when it was moved to the repository, and the SID is unknown to the Username-SID database.

The default sort order per page is alphabetical by the *File or Folder Name* column. You can click a column heading to sort the displayed files in ascending order (click once) or descending order (click again). The sort order changes only for the files and folders that are currently displayed on the page. Numbers in filenames are sorted as text, not as numbers.

A subfolder is automatically removed from the repository and display when all of the files in it have been permanently deleted or have been restored to the primary. A policy run or manual move folder is also removed when it no longer contains files.

Understanding the Review Process

The Retention Review group can have any number of members. Each reviewer assesses retained files independently of the other reviewers. If multiple reviewers concurrently access the repository, their actions are processed on a first-come, first-served basis.

A reviewer's restore and delete actions are not executed immediately. The Retention Review Service creates a one-time action job for the selected files and folders, then queues the job to be executed in turn with any other actions taken for the retained data. The files are removed immediately from the reviewer's display when the page refreshes, but the action might not be processed until several seconds or minutes later.

Because the review actions are queued, it is possible that a prior action in the queue can override a subsequent action or some portion of an action. For example, if one reviewer deletes a file, and another restores the same file at almost the same time, the resulting action depends on which request is processed first.

The review page is refreshed every 10 seconds to display the current status of the repository. The following states are reported:

- **Idle:** No policies are running.New actions are queued to run within seconds.
- **Policy run (or Manual Move) is in progress:** A normal policy run or a manual move is in progress, which can take several minutes to several hours. Any number of previous actions might be queued behind it.
- **Restore/Move file job (or Delete file job) is in progress:** A restore action job is busy moving files from the repository to their original location in the primary path, or a delete action is deleting files from the repository. The job might be one that was submitted by any of the current or previous reviewers.

When the repository status returns to an idle state, the reviewer knows that all action jobs are complete.

It is not necessary to remain logged in after your actions are queued. It is not possible to stop queued actions.

Deleting Files or Folders

The Delete function purges selected files or folders from a selected retention review folder. The file is no longer available on the storage media, and you cannot use the Restore function to restore it.

A reviewer can delete one or more files, folders, or review folders at a time. Deleting a folder also recursively deletes its contents. It can take a few minutes to completely delete the contents of a folder, depending on how many files and folders it contains.

1 On a page in the Retention Review Web interface, select the check box next to one or more files, folders, or review folders.
2 Click *Delete Selected*.
3 When you are prompted, click *OK* to confirm the deletion, or click *Cancel* to abandon the action.

All delete actions are logged in the Review Transaction History for the retention pair. The history is available to the Dynamic File Services administrators. Contact your administrator if you need a copy of the log files.

Restoring Files or Folders

The Restore function moves selected files or folders from a retention review folder back to the original path on the primary location. The restored file or folder is no longer available in the review folder.

A reviewer can restore one or more files or folders at a time. Each object returns to its original path on the primary location. Restoring a folder also recursively restores its contents. It can take a few minutes to complete the move, depending on how many files and folders are involved, and the size of the files to be moved.

1 On a page in the Retention Review Web interface, select the check box next to one or more files, folders, or review folders.
2 Click *Restore Selected*.
3 When you are prompted, click *OK* to confirm the restore, or click *Cancel* to abandon the action.

All restore actions are logged in the Review Transaction History for the retention pair. The history is available to the Dynamic File Services administrators. Contact your administrator if you need a copy of the log files.