How to Configure
File Server Resource Manager
in Windows Server 2012 R2
and Above



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## Introduction

Windows File Server Resource Manager (FSRM) enables you to classify your most important and sensitive data in your File Servers. Add the FSRM role from the File & Storage Services in the "Add roles and features wizard".

You can refer to the following to configure FSRM so that it works with LepideAuditor. Once properly configured, you will be able to see the records in LepideAuditor itself.

## Installing the role

1. Go to Server Manager and click on "Add roles and features" to bring the following window:

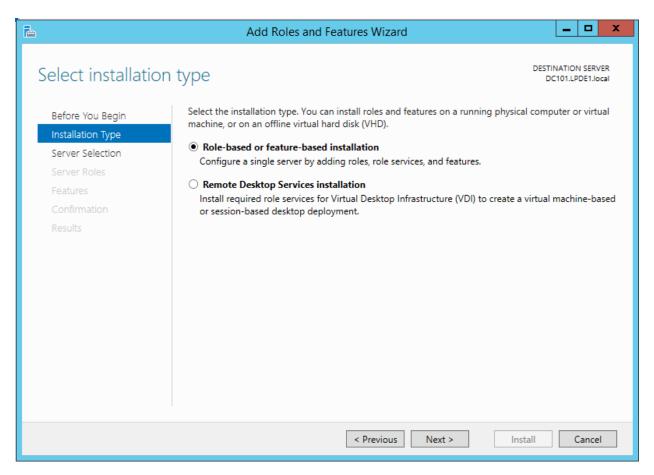


Figure 1: Add Roles and Features Wizard

2. Click Next and Select your Domain Controller from the list.

3. Scroll down to "File and Storage Services" and expand "File and iSCSI Services" to see "File Server Resource Manager".

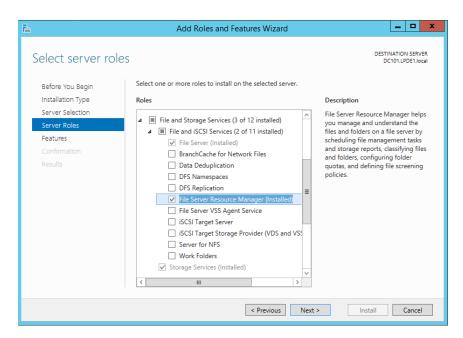


Figure 2: Server Roles in the Roles and Features Wizard

4. Click Next and install the role.

# Initial Configuration

Now that File Server Resource Manager is installed on the server, there's some initial configuration that you'll need to perform first.

1. First, open the FSRM administrative tool. Right-click on File Server Resource Manager (local) and then Configure Options.

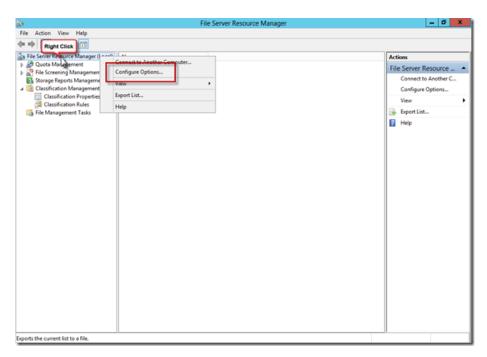


Figure 3: Configuring Options in File Server Resource Manager

2. The first tab you'll be presented with is the Email Notifications. Here's where you'll want to specify your SMTP server and other default email settings. The Default administrator recipients can be used in other areas of FSRM as a variable. If you need to customize who receives which notifications (for example, one person receives quota notices and another receives storage reports), you'll be able to configure that later.

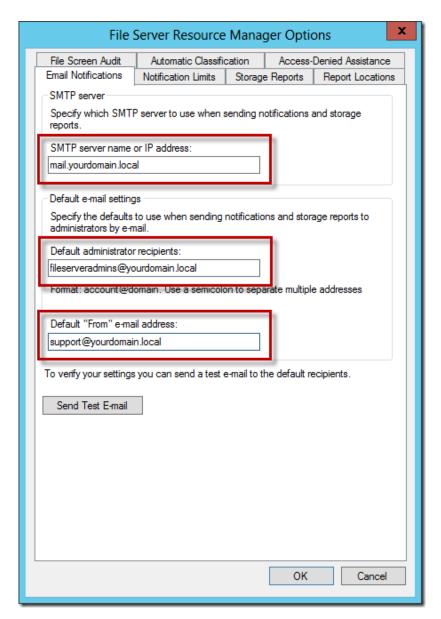


Figure 4: File Server Resource Manager Options

3. The Notification Limits tab allows you to limit how often notifications are generated. Typically, the defaults have worked well for me personally, but your mileage may vary.

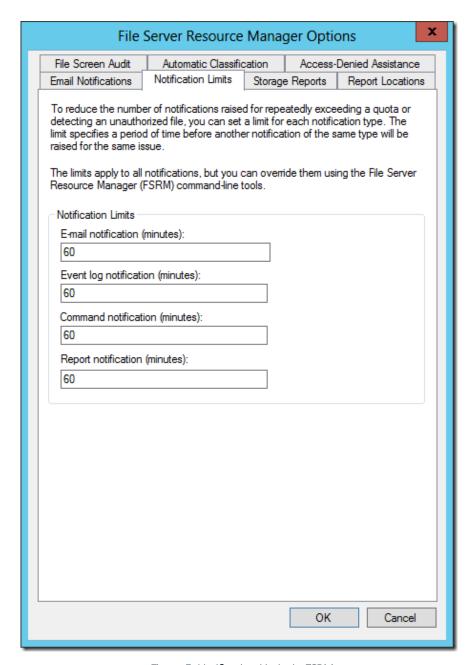


Figure 5: Notification Limits in FSRM

4. The Storage Reports tab allows you to customize default parameters on the various storage reports FSRM generates. These defaults can be overridden, but let you set baselines or defaults so you don't have to constantly change your parameters if you're using the same thing over and over. Typically, we don't make changes here until we've been able to baseline a particular file server.

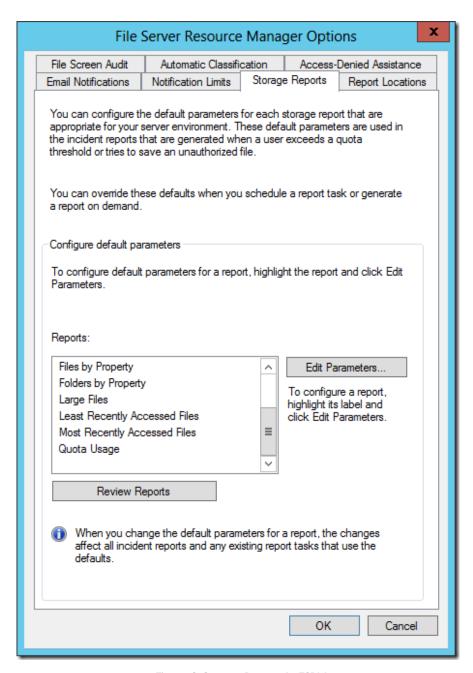


Figure 6: Storage Reports in FSRM

5. The Report Locations tab, as the name implies, lets you change where reports generated by FSRM are stored. Do not make any changes to these locations as these will also be entered in the LepideAuditor console.

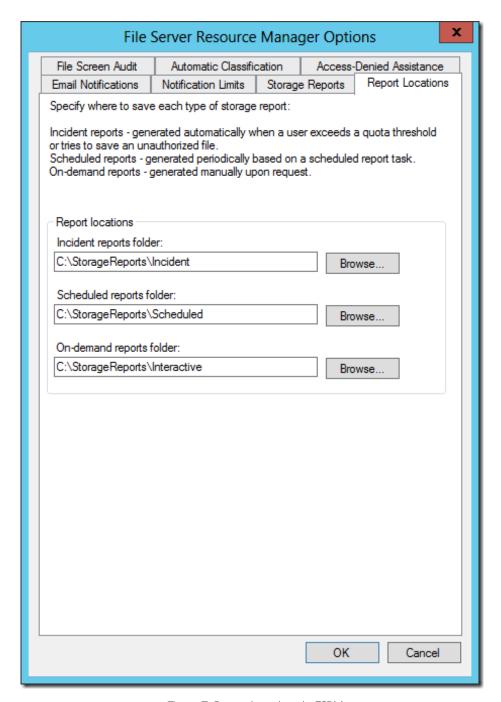


Figure 7: Report Locations in FSRM

6. The File Screen Audit tab lets you enable storing of file screening activity in an auditing database. There is not much use for this feature. However, depending on your environment, this could be very valuable to enable if you need to track files that are being blocked form your file server.

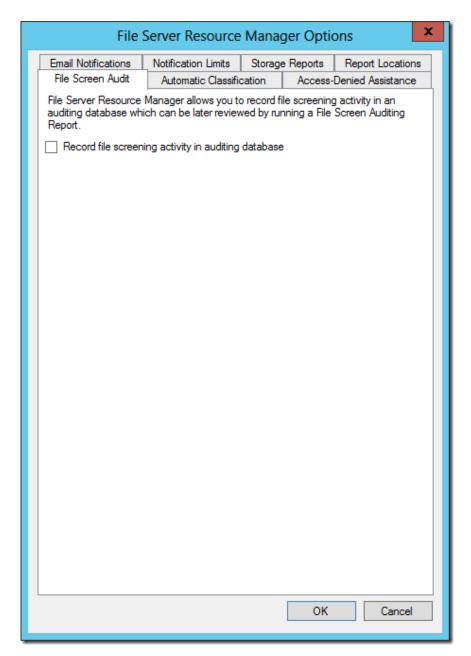


Figure 8: File Screen Audit in FSRM

7. The Automatic Classification tab allows you to set a schedule for your file classifications to run. If you're planning on using this feature, you'll need to visit this tab at some point to set up a schedule.

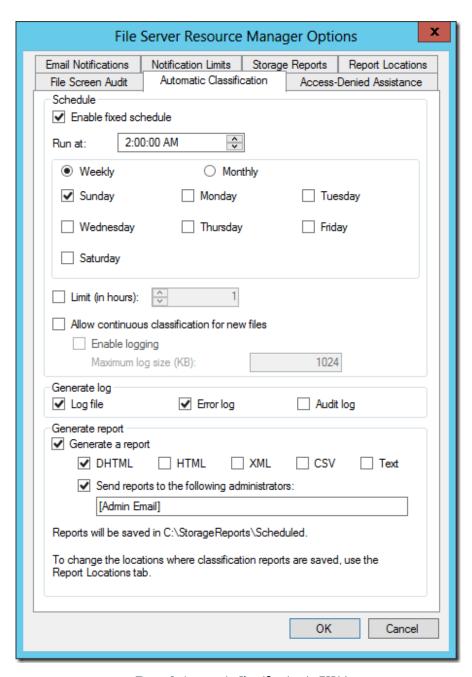


Figure 9: Automatic Classification in FSRM

# Creating a Classification Property

In this section we'll discuss File Classification Management and how it can be used to better manage files on your file server. File Classification allows you to set additional file attributes outside of what are normally associated with a file. Files typically have attributes like author, last saved, company, owner, etc.

File Classification allows you to supplement those attributes with additional information that may be industry or organization specific based on classifications you perform manually or automatically. File Classification has been greatly improved in Server 2012. Many of the features discussed below like which users can classify files, the UI in Explorer, and automatic classification aren't available in Server 2008 R2.

1. In the FSRM administrative tool, go to the Classification Management area. Expand Classification Management and click on Classification Properties. Now click on Create Local Property.

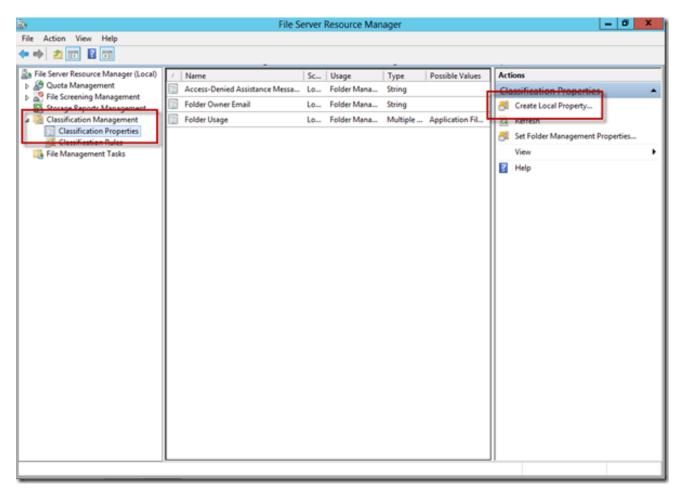


Figure 10: Classification Properties in FSRM

2. Set a Name, Description, and Property type. Property types can be Yes/No, Date/Time, Numbers, Multiple Choice Lists, Ordered Lists, Single Choice, String, and Multi-String. In the example here, we've used Social Security Number since that is a very common piece of data, companies in the US consider sensitive and want to identify.

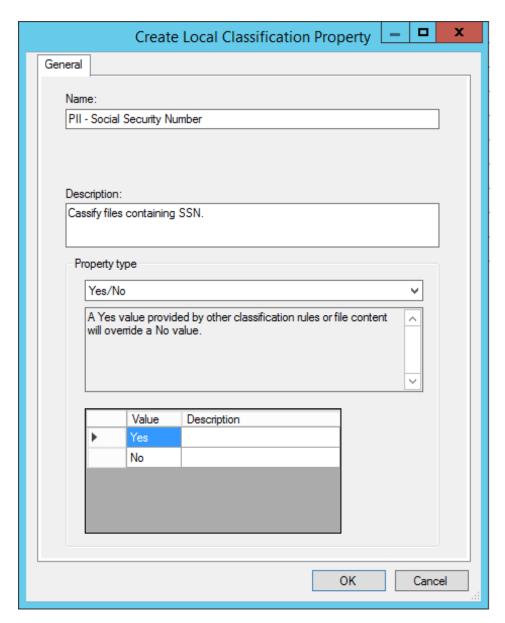


Figure 11: Creating a Local Classification Property

# Creating a Classification Rule

1. Now that we've created a file classification, we can configure the classification to be applied to files automatically via a schedule or on an ongoing basis. In the FSRM administrative tool, go to Classification Rules under the Classification Management Area, and click on Create Classification Rule.

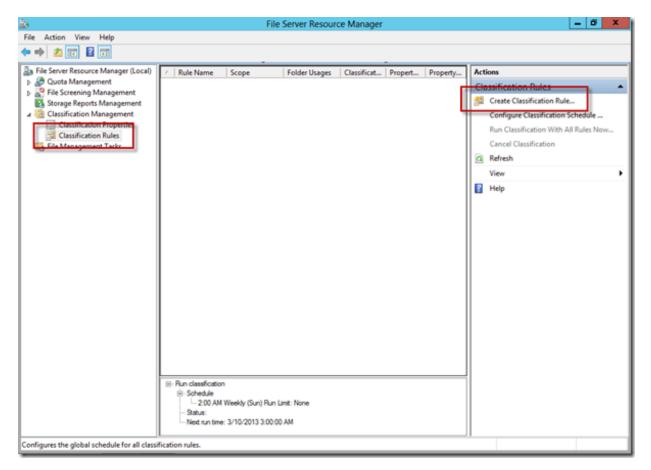


Figure 12: Classification Rules in FSRM

2. In the General tab, set a Rule name and ensure that Enabled is checked.

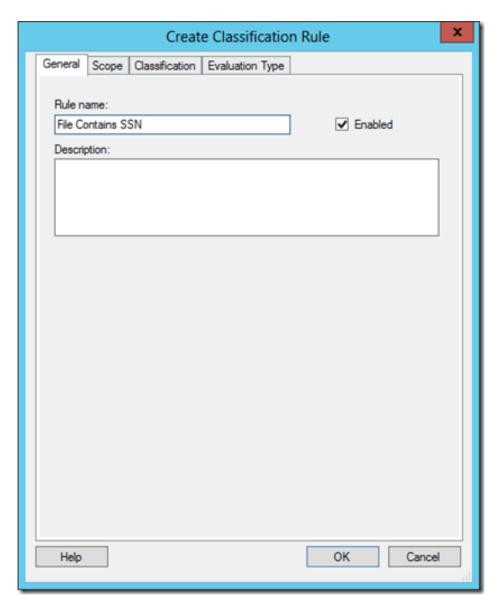


Figure 13: General Section of Classification Rule

3. In the Scope tab, set the type of data and folders that will be scanned.

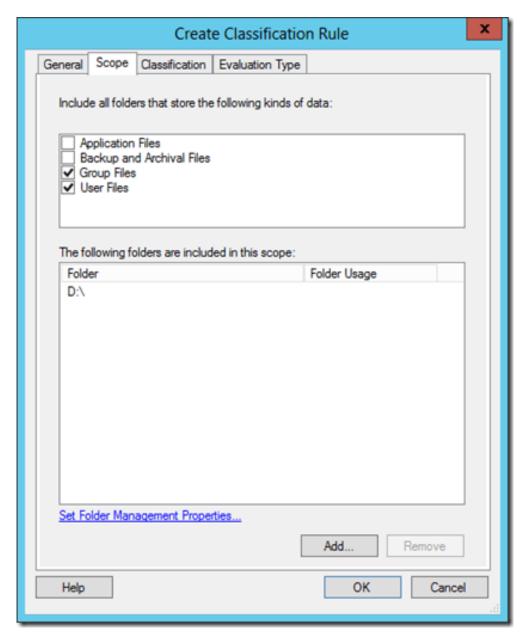


Figure 14: Scope of Classification Rule

4. In the Classification tab, set the Classification method to Content Classifier. In Property, choose the classification and set the value. In Parameters, click Configure. In the Classification Parameters, you'll have to set the logic that will be used for finding information inside files. In the case of our example, Social Security Numbers always follow the pattern 3 numbers, 2 numbers, 4 numbers. In addition to use regular expressions, you can also use a string value (both case-sensitive and case-insensitive).

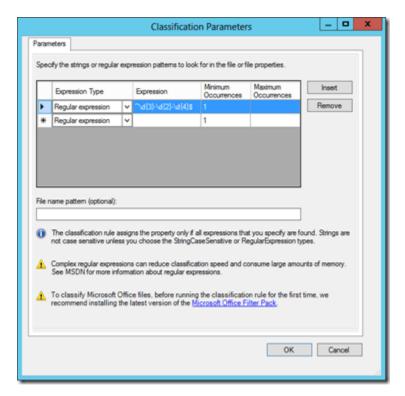


Figure 15: Classification Parameters

5. In the Evaluation Type tab, determine whether files should be re-evaluated or whether they should be evaluated only once. Also determine whether you want to overwrite or keep old values and click OK.

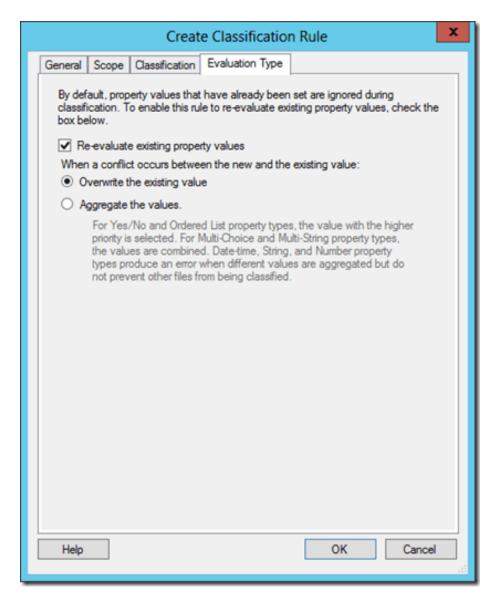


Figure 16: Evaluation Type in Classification Rule

6. You may have also noticed the option, Configure Classification Schedule in the Classification Rules area. If you're updating your classification rules, you will need to revisit these settings. If you're planning on automatically classifying files, your business needs are going to dictate how often you need the process to run. An initial pass over a large data set can take quite some time... so definitely set the schedule to run during off hours and setting the limit.

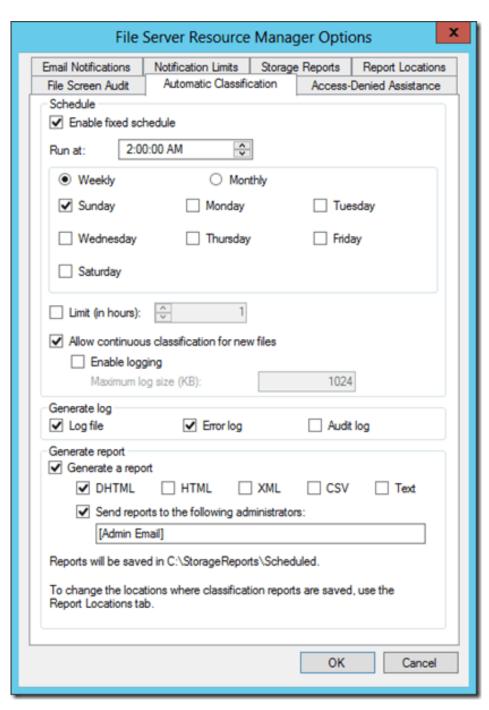


Figure 17: Automatic Classification in FSRM

## Creating/Modifying a Storage Report

1. To create a new storage report for any property, select 'Storage Reports Management' and either right click in the work area to select 'Schedule a New Report Task' or click on the same option from the 'Action' page in the right.

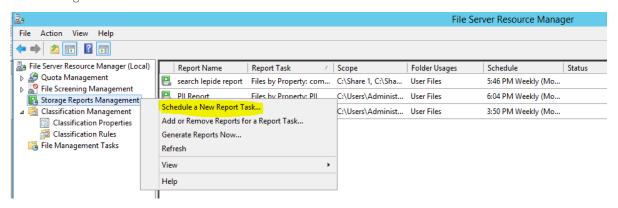


Figure 18: Scheduling a New Report Task

2. Enter a Report Name. Uncheck all other reports and check only 'Files by Property' in the 'Report Data' section. Adjust the 'Maximum Number' if needed. Check 'XML' in Report Formats and click on 'Edit Parameters'

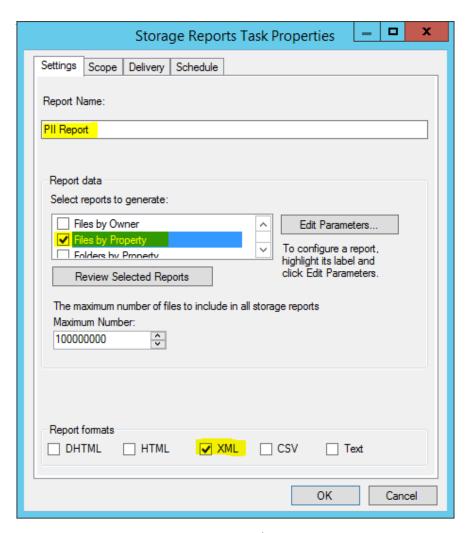


Figure 19: Storage Reports Task Properties

3. In the 'Report Parameters' window, select a Property from the drop down, modify any additional settings if necessary and click on 'Ok'.

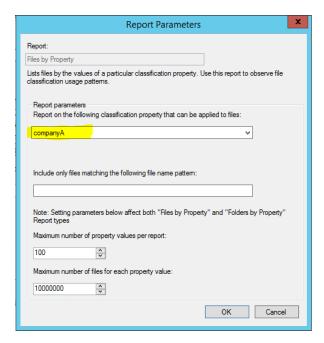


Figure 20: Report Parameters

4. Configure the 'Scope' and 'Delivery' tab options as needed: Select the folders in which reports should be generated.

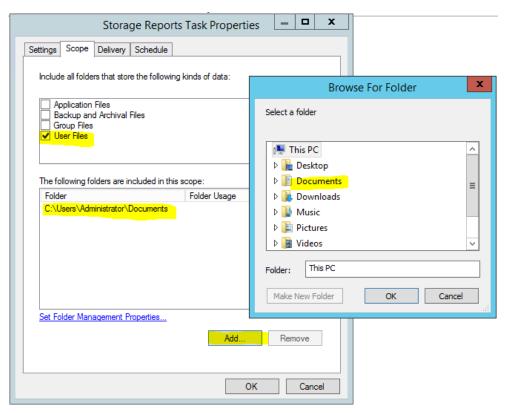


Figure 21: Browsing for Folder in Storage Reports Task

## Steps to Extend the Limits

1. Right click on the 'File Server Resource Manager (Local)' node and select 'Configure Options':

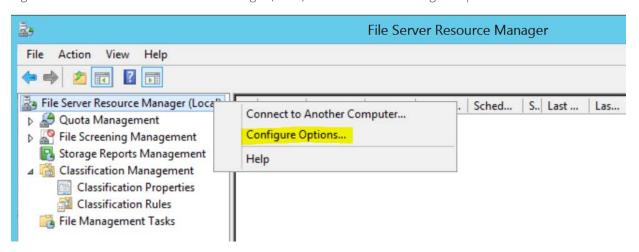


Figure 22: Configure Options in FSRM

2. Go to 'Storage Reports' tab:

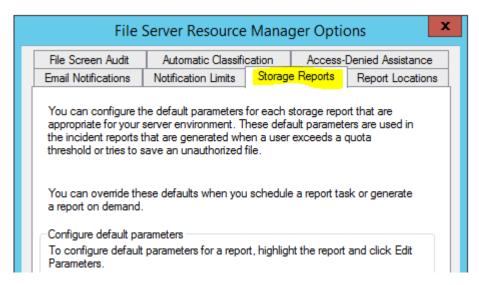


Figure 23 Storage Report Tab in FSRM

3. Change the 'Maximum Number' value shown below to a higher one (e.g. 1,000,000).

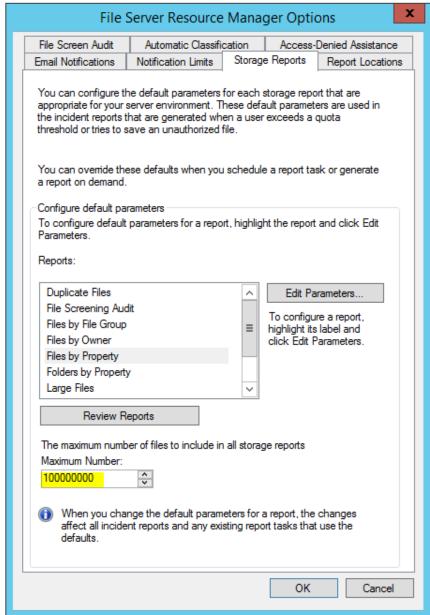


Figure 24: Maximum Number in FSRM Storage Reports

4. Select 'Files by Property' in the Reports list box and click on the 'Edit Parameters' button to open the 'Report Parameters' window.

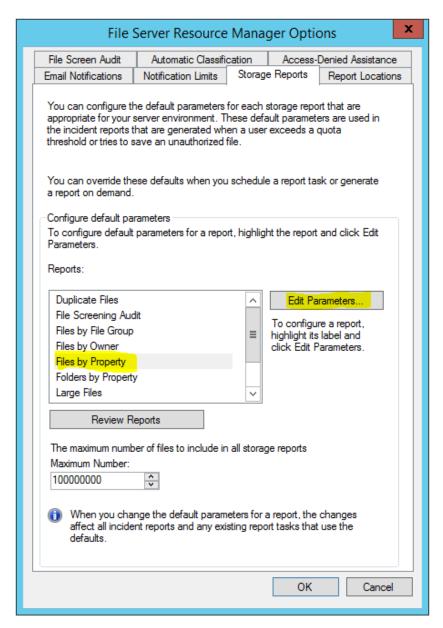


Figure 25: Editing Parameters in FSRM Storage Reports

5. Change the values in the 'Maximum number of property values per report' and 'Maximum number of files per each property value' fields to a higher one (e.g. 50 and 1,000,000 respectively) and click on 'Ok' button.

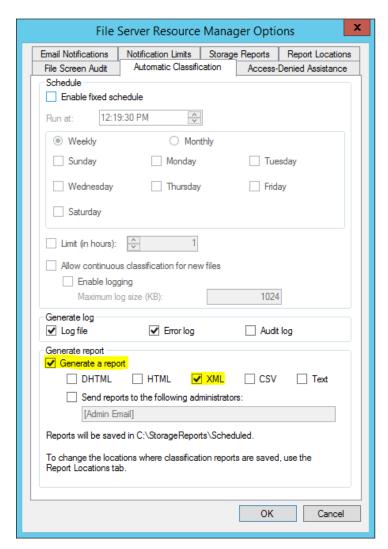


Figure 26: Automatic Classification in FSRM

## Selecting the Report Format

To select the proper format of the report used by LepideAuditor, we need to manage it from following two locations:

- A. From the "Automatic Classification" Tab in Configure Options window
- B. From the "Storage Report Task Properties" Window

#### A. From the "Automatic Classification" Tab in the Configure Options window

To set the report type, go to the 'Automatic Classification' tab and check the 'Generate a Report' and 'XML' check boxes, as displayed. (Note: XML reports are mandatory).

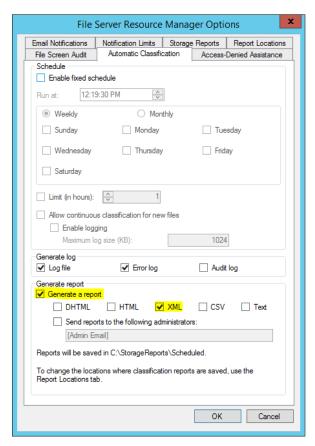


Figure 27: Generating a Report in FSRM

#### B. From the "Storage Report Task Properties window

This must be done either whilst creating a storage report or editing an existing storage report:

- 1. Select an existing Storage Report and double click to open its properties.
- 2. In the settings tab, select XML from the "Report Formats" and click "OK".

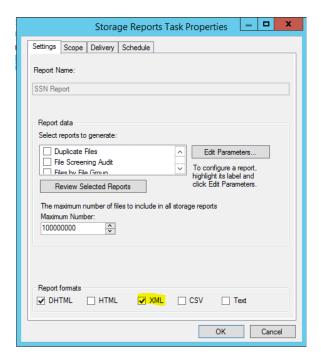


Figure 28: Report Formats in Storage Reports Task Properties

## Setting a Schedule

A schedule must be set in two sections in FSRM:

- A. In the "Automatic Classification" Tab of the Configure Options Window
- B. In the "Storage Report Task Properties" Window

#### A. In the "Automatic Classification" Tab of the Configure Options Window

- 1. Check the 'Enable fixed schedule' box.
- 2. Set a time in the 'Run at' time field.
- 3. Select a routine: Weekly or Monthly.
- 4. Check the days on which classification rules should run.

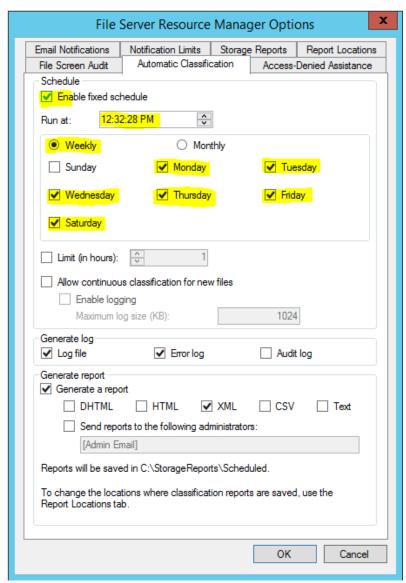


Figure 29: Schedule for Automatic Classification

5. To classify files on the fly as soon as they are created, check the 'Allow continuous classification for new files' box, as shown below:

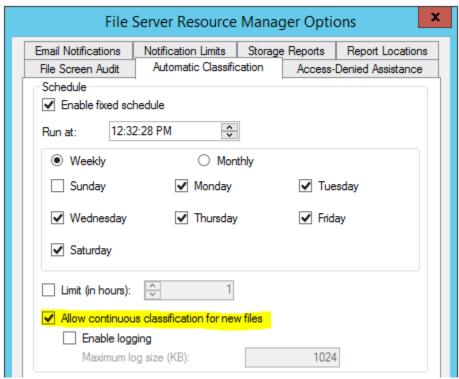


Figure 30: Continuous Classification for New Files

#### B. In the "Storage Report Task Properties" Window

Go to the "Schedule" tab in the Storage Report Task Properties window and select the Time, Frequency (Weekly or Monthly) and Days and click "OK".

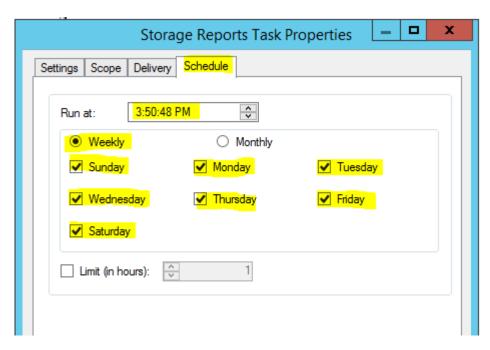


Figure 31: Storage Reports Task Properties Schedule

# Changing the Default Location of Storage Reports

By Default, storage reports are located at C:\Storage Reports. To change the default storage location for FSRM reports, go to the 'Report Locations' tab and select the desired folders in the highlighted fields shown below. (Make sure the same folders are selected in the Lepide configuration).



Figure 32: Report Locations in FSRM

## On Demand (Manual) Report Generation

Run automatic classification reports by right clicking the 'Classification Rules' node and selecting the below highlighted option OR selecting the node and clicking on said option in the 'Action' pane.

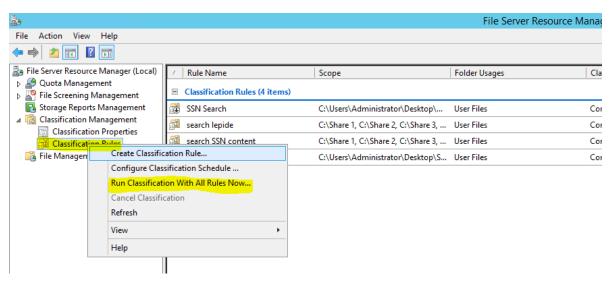


Figure 33: Running Classification with All Rules

2. Run on demand storage reports by right clicking on each report and selecting the 'Run Report Task Now' or by clicking on the same option from the 'Actions' pane after selecting the respective report.

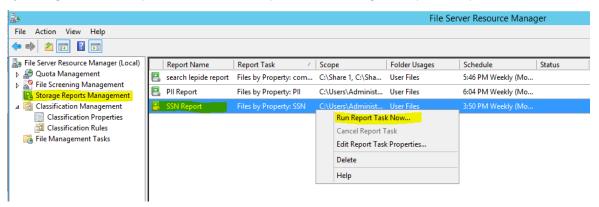


Figure 34: Running Report Tasks

## Declassification of the Files

To clear any classification property from files which no longer have any sensitive data, configure the below option whilst creating or editing classification rules.

- 1. Check the 'Re-evaluate existing property values'.
- 2. Select 'Overwrite the existing value' and check both the boxes below it.

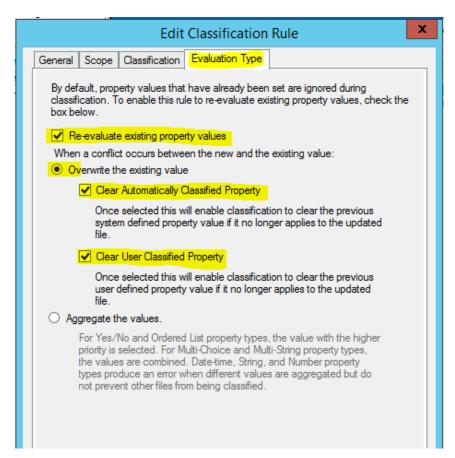


Figure 35: Evaluation Types

# Important Info for Windows Server 2008 R2 and Server 2012:

The flexibility of being able to increase the maximum number of files displayed in a report is not available in Windows server 2008 R2 and 2012. However, there are many scripts available online to remove these limits.

## Support

If you are facing any issues whilst installing, configuring or using the solution, you can connect with our team using the below contact information.

#### Product experts

USA/Canada: +1-800-814-0578

UK/Europe: +44 (0) -845-594-3766

Rest of the World: +91 (0) -991-004-9028

### Technical gurus

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sales@Lepide.com

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