Clearswift IGS Client Application

File Server Resource Manager Integration Guide

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1. Introduction

This document describes how the IGS Client Application can be integrated with the Windows File Server Resource Manager (FSRM) feature to automatically register classified data with the IG Server.

The FSRM is designed to set up server-side file management pipelines. For further information about how to configure and use the FSRM, refer to the following:

https://docs.microsoft.com/en-us/windows-server/storage/fsrm/fsrm-overview

Prerequisites

To integrate the IGS Client Application with the FSRM, you will need the following:

- An Ubuntu 14.04 Server with the latest IG Server installed
- A Windows 2012 R2 Server (or above), which:
    - Is a member of the same domain (or a trusted domain) as used by your IG Server
    - Has the FSRM feature installed
    - Has the IGS Client Application installed

2. Server configuration

Configuring your IG Server

Follow these steps to grant your Windows Server permission to communicate with the IG Server:

1. Log in to the IG Server Admin UI as an Administrator.
2. Navigate to **System** > **Security** > **Client Application Access**.
3. Add the IP address of your Windows Server.
4. Copy the Client Application access token to your clipboard.

Configuring your Windows Server

To configure your Windows Server, you must first install the File Server Resource Manager (FSRM) feature using the **Server Manager** > **Add Roles and Features** wizard.

Install the IGS Client Application by opening the installation wizard then:

1. Click **Settings**.
2. Set the installation directory to **C:\IGSClient**.
3. Set the IG Server host address and access token, using the token you copied in step 4 of Configuring your IG Server.
4. Click **Install** to start the installation process.
5. On completion, double-click the desktop shortcut to confirm that the IGS Client Application can communicate with your IG Server.
6. Configure the security permissions on the installation directory following the instructions in the note below.

> (i) Due to the FSRM security policy, the IGS Client Application must be set to writable by Administrators or System only. This requires you to install the IGS Client Application to an isolated folder so you can modify the folder permissions without destabilizing other applications.
>
> Follow the steps below to remove the writable permission from any other user:
>
> a. In Windows Explorer, open the properties on **C:\IGSClient**.
> b. Select **Security** > **Advanced**.
> c. Select **Change Permissions** > **Disable Inheritance** >

Convert to convert the inherited permissions into explicit permissions on this object.

d. Remove the writable permission for any non-Administrator or System users.

3. File Server Resource Manager configuration

To add the rules to FSRM that will classify and register items with the IG Server, you can use the PowerShell Cmdlet *Set-IGSClassificationRules*.

To add a new classification rule:

1. Open a PowerShell console as an Administrator.

2. Execute the Cmdlet using the command:

```
Set-IGSClassificationRules -classification <classification> -
folderPath <folderPath> -owner <domainUser>
```

where

<classification>	must match a classification description in your IG Server Policy
<folderPath>	must be a valid path to the folder you want to monitor
<domainUser>	must be the username of a valid domain user whom you want to own any items registered with the IG Server

3. For each rule added, the files in the **<folderPath>** are registered on the IG Server as follows:

    - The collection name will be **<folderPath>**
    - The classification will be **<classification>**
    - The owner will be **<domainUser>**

4. Repeat step 2 for each folder you want to monitor and register.

4. Viewing and customizing the ruleset

The ruleset that is created by the script can be further customized by using the File Server Resource Manager (FSRM) user interface, available from **Server Manager** > **Tools** > **File Server Resource Manager**.

This allows logging and reporting to be enabled and customized to your user requirements.

5. Troubleshooting

If you are having problems, review the following tips:

1. In **File Management Tasks**, you can enable logging using the rule **Report** tab. This generates a log file in:

    - **C:\StorageReports\Interactive** (if you run the task now)
    - **C:\StorageReports\Scheduled** (if you run using the FSRM Schedule)

2. See the activity.log in **<SYSTEMDRIVE>:\users\default\appdata\roaming\Clearswift\IGS Client** for diagnostic information about any items registered by the FSRM rules you configure.