



# Integrating CTERA with File Access Manager

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## Capabilities

This connector enables you to use File Access Manager to access and analyze data stored in CTERA and do the following:

- Analyze the structure of your stored data.
- Classify the data being stored.
- Verify user permissions on the resources, and compare them against requirements.

See the File Access Manager documentation for a full description.

## Supported Versions

- Portal 6.0.512.2
- Gateway: 6.0.537

## Connector Overview

File Access Manager connects to the CTERA master gateway through CIFS and analyzes the share and NTFS permissions on all the folders.

There is no option to install Activity Monitoring since it is not supported for CTERA in the current release.

# CTERA Connector Prerequisites

## Configure a Master gateway

The File Access Manager connector is installed on the Master Gateway.

Before installing the connector, ask CTERA to configure a Master Gateway for your installation.

## CTERA User Permissions

The user configured in the Application configuration wizard should fit the following profile:

- A member of the local Administrators group in the CTERA master gateway.
- This user can be a local or Active Directory user.
- Share Read permissions to all shares on the file server
- NTFS Read permission to all files and folders

## Communications Requirements

Requirement	Source	Destination	Port
File Access Manager Message Broker	Permissions Collector / Data Classification Collector	RabbitMQ	5671
File Access Manager Access	Permissions Collector / Data Classification server	CTERA Master Gateway	CIFS/SMB (139, 445)

## Software Requirements

File Access Manager requires the latest ASP.NET Core 3.1.x Hosting Bundle. This bundle consists of .NET Runtime and ASP .NET Core Runtime. You can download the latest 3.1.x Hosting Bundle version from [here](#).

## CTERA Installation Flow Overview

To install the CTERA connector:

1. Configure all the prerequisites.
2. Add a new CTERA application in the Business Website.
3. Install the relevant services:
  - Permissions Collector
  - Data Classification Collector

Installing the permissions collector and data classification services is optional and should only be installed by someone with a full understanding of File Access Manager deployment architecture. The File Access Manager Administrator Guide has additional information on the architecture.

## Collecting Data Stored in an External Application

### Terminology:

#### **Connector**

The collection of features, components and capabilities that comprise File Access Manager support for an endpoint.

#### **Collector**

The “Agent” component or service in a Data Classification and or Permission Collection architecture.

#### **Engine**

The core service counterpart of this architecture.

#### **Identity Collector**

A logical component used to fetch identities from an identity store and holds the configuration, settings for that identity store, and the relations between these identities.

The identity collector has no “physical” manifest.

- The actual work is done by the Collector Synchronizer.

The list below describes the high level installation process required to collect and analyze data from an external application. Most of these should already be set up in your File Access Manager installation. See the server Installation guide for further details.

#### **Install a Data Classification central engine**

One or more central engines, installed using the server installer

#### **Install a Permission Collection central engine**

One or more central engines, installed using the server installer

#### **Create an Application in File Access Manager**

From the Business Website. The application is linked to central engines listed above.

#### **Install Permission Collectors and / or Data Classification Collector (optional)**

Optionally, you can install collectors that will run on a separate server and take some of the work from the central PC and DC engines (Where supported). When installing a collector, you attach it to an engine. If no collectors are installed, the central services act as both the engine and the collector.

For further details, see section **Application > Central Service > Collector Relations** in the File Access Manager Administrator Guide



## Adding a CTERA Application

In order to integrate with CTERA, we must first create an application entry in File Access Manager. This entry includes the identification, connection details, and other parameters necessary to create the link.

To add an application, use the **New Application Wizard**.

1. Navigate to *Admin > Applications*
2. Click **Add New** to open the wizard.

### Select Wizard Type

1. Click **Standard Application**
2. Click **Next** to open the **General Details** page.

### General Details

#### **Application Name**

Logical name of the application

#### **Description**

Description of the application

#### **Tags**

Select tags for the application from the dropdown menu, and / or type a new name, and press **Enter** to create a new tag. The dropdown list of tags filters out matching tags as you type and displays up to 50 tags.

The **tags** replace the **Logical container** field that was used when creating applications in releases before 8.2

#### **Event Manager Server**

This option is available if there are more than one event manager servers configured in the system.

Select an event manager from the drop down menu.

#### **Identity Collector**

Select from the Identity Collector dropdown menu.

- You can create identity collectors in the administrative client. **Applications > Configuration > Permissions Management > Identity Collectors**.

See section "OOTB Identity Collection" in the Collector Installation Manager File Access Manager Administrator Guide for further details.

- If adding a new identity collector, press the **Refresh** button to update the Identity Collector dropdown list.

Click **Next**. to open the Connection Details page.

## Connection Details

Complete the Connection Details fields:

### **Server Name**

The name of the CTERA Master Gateway

### **Domain Name**

The user defined in the prerequisites

### **User / Password**

Credentials of the user defined in the prerequisites (This must be an admin user on the CTERA master gateway)

Click **Next**.

## Configuring and Scheduling the Permissions Collection


Permissions can be analyzed to determine the application permissions of an out-of-the-box application, provided you have defined an identity store for File Access Manager to use in its analysis, and you have run a crawl for the application.

The permission collector is a software component responsible for analyzing the permissions in an application.

The Central Permission Collector Service is responsible for running the Permission Collector and Crawler tasks.

If the "File Access Manager Central Permission Collector" wasn't installed during the installation of the server, this configuration setting will be disabled.

### To configure the Permission Collection

- Open the edit screen of the required application.
  - a. Navigate to **Admin > Applications**.
  - b. Scroll through the list, or use the filter to find the application.
  - c. Click the edit icon  on the line of the application.
- Press **Next** till you reach the **Crawler & Permissions Collection** settings page.

The actual entry fields vary according to the application type.

When entering this page in edit mode, you can navigate between the various configuration windows using the **Next** and **Back** buttons.

### **Central Permissions Collection Service**

Select a central permission collection service from the dropdown list. You can create permissions collection services as part of the service installation process. See section "Services Configuration" in the File Access Manager Administrator Guide for further details.

### **Skip Identities Sync during Permission Collection**

Skip identity synchronization before running permission collection tasks when the identity collector is common to different connector.

This option is checked by default.

## Scheduling a Task

### Create a Schedule

Click on this option to view the schedule setting parameters.

### Schedule Task Name

A name for this scheduling task

When creating a new schedule, the system generates a default name in the following format:

{appName} - {type} Scheduler

You can override or keep this name suggestion.

### Schedule

Select a scheduling frequency from the dropdown menu.

- **Schedule Types and Intervals**

#### Once

Single execution task runs.

#### Run After

Create dependency of tasks. The task starts running only upon successful completion of the first task.

#### Hourly

Set the start time.

#### Daily

Set the start date and time.

#### Weekly

Set the day(s) of the week on which to run.

#### Monthly

The start date defines the day of the month on which to run a task.

#### Quarterly

A monthly schedule with an interval of 3 months.

#### Half Yearly

A monthly schedule with an interval of 6 months.

### **Yearly**

A monthly schedule with an interval of 12 months.

### **Date and time fields**

Fill in the scheduling times. These fields differ, depending upon the scheduling frequency selected.


### **Active check box**

Check this to activate the schedule.

Click **Next**.

## **Configuring and Scheduling the Crawler**

### **To set or edit the Crawler configuration and scheduling**

- Open the edit screen of the required application.
  - a. Navigate to **Admin > Applications**.
  - b. Scroll through the list, or use the filter to find the application.
  - c. Click the edit icon  on the line of the application.
- Press **Next** till you reach the **Crawler & Permissions Collection** settings page.

The actual entry fields vary according to the application type.

### **Create a Schedule**

Click to open the schedule panel. See [Scheduling a Task](#)


### **Setting the Crawl Scope**

There are several options to set the crawl scope:

- Setting explicit list of resources to include and / or exclude from the scan.
- Creating a regex to define resources to exclude.

### **Including and Excluding Paths by List**

#### **To set the paths to include or exclude in the crawl process for an application**

- Open the edit screen of the required application.
  - a. Navigate to **Admin > Applications**.
  - b. Scroll through the list, or use the filter to find the application.
  - c. Click the edit icon  on the line of the application.
- Press **Next** till you reach the **Crawler & Permissions Collection** settings page.


The actual entry fields vary according to the application type.

1. Scroll down to the Crawl configuration settings.
2. Click **Advanced Crawl Scope Configuration** to open the scope configuration panel.
3. Click Include / Exclude Resources to open the input fields.
4. To add a resource to a list, type in the full path to include / exclude in the top field and click + to add it to the list.
5. To remove a resource from a list, find the resource from the list, and click the x icon on the resource row.

When creating exclusion lists, excludes take precedence over includes.

### Excluding Paths by Regex

**To set filters of paths to exclude in the crawl process for an application using regex.**

- Open the edit screen of the required application.
  - a. Navigate to **Admin > Applications**.
  - b. Scroll through the list, or use the filter to find the application.
  - c. Click the edit icon  on the line of the application.
- Press **Next** till you reach the **Crawler & Permissions Collection** settings page.

The actual entry fields vary according to the application type.

1. Click **Exclude Paths by Regex** to open the configuration panel.
2. Type in the paths to exclude by Regex, See regex examples in the section below. Since the system does not collect BRs that match this Regex, it also does not analyze them for permissions.

### Crawler Regex Exclusion Example

The following are examples of crawler Regex exclusions:

**Exclude all shares which start with one or more shares names:**

Starting with `\\server_name\shareName`

Regex: `\\\\server_name\\shareName$`

---

Starting with `\\server_name\shareName` or `\\server_name\OtherShareName`

Regex: `\\\\server_name\\(shareName|OtherShareName)$`

---

**Include ONLY shares that start with one or more share names**

Starting with `\\server_name\shareName`

Regex: `^(?!\\\\server_name\\shareName($|\\.\\.*)).*`

---

Starting with `\\server_name\shareName` or `\\server_name\OtherShareName`

Regex: `^(?!\\\\server_name\\(shareName|OtherShareName)($|\\.\\.*)).*`

---

**Narrow down the selection:**

Include ONLY the C\$ drive shares: \\server\_name\C\$

Regex: `^(?!\\\\\\server_name\\C$($|\\.*)) .*`

---

Include ONLY one folder under a share: \\server\share\folderA

Regex: `^(?!\\\\\\server_name\\share\$($|\\folderA$|\\folderA\\.*)) .*`

---

Include ONLY all administrative shares

Regex: `^(?!\\\\\\server_name\\[a-zA-Z]\$($|)).*`

---

To write a backslash or a Dollar sign, add a backslash before it as an escape character.

To add a condition in a single command, use a pipe character “|” .

**Excluding Top Level Resources**

Use the top level exclusion screen to select top level roots to exclude from the crawl. This setting is done per application.

**To exclude top level resources from the crawl process**

1. Open the application screen

*Admin > Applications*

2. Find the application to configure and click the drop down menu on the application line. Select **Exclude Top Level Resources** to open the configuration panel.

3. **Run Task**

The Run Task button triggers a task that runs a short detection scan to detect the current top level resources.

Before running the task for the first time, the message above this button is:

**"Note: Run task to detect the top-level resources"**

If the top level resource list has changed in the application while you are on this screen, press this button to retrieve the updated structure.

Once triggered, you can see the task status in

*Settings > Task Management > Tasks*

This will only work if the user has access to the task page

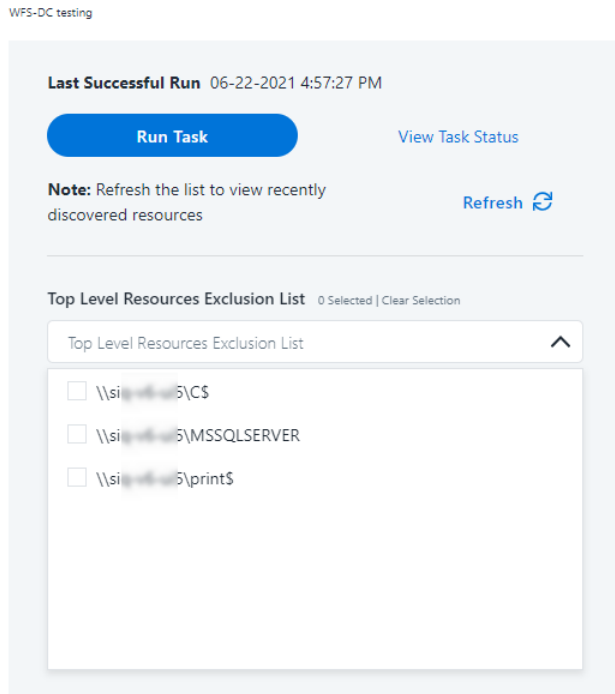
When the task has completed, press **Refresh** to update the page with the list of top level resources.

## Adding a CTERA Application

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4. Click the top level resource list, and select top level resources to exclude.
5. Click **Save** to save the change.
6. To refresh the list of top level resources, run the task again. Running the task will not clear the list of top level resources to exclude.

### Top Level Resources Exclusion



### Special Consideration for Long File Paths in Crawl

If you need to support long file paths above 4,000 characters for the crawl, set the flag

**excludeVeryLongResourcePaths**

in the Permission Collection Engine App.config file to true.

By default this value will be commented out and set to false.

This key ensures, when enabled, that paths longer than 4000 characters are excluded from the applications' resource discovery (Crawl), to avoid issues while storing them in the SQLServer database.

When enabled, business resources with full paths longer than 4000 characters, and everything included in the hierarchical structure below them, will be excluded from the crawl, and will not be collected by File Access Manager. This scenario is extremely rare.

You should not enable exclusion of long paths, unless you experience an issue.

### Background

File Access Manager uses a hashing mechanism to create a unique identifier for each business resource stored in the File Access Manager database. The hashing mechanism in SQL Server versions 2014 and earlier, is unable to process (hash) values with 4,000 or more characters.

Though resources with paths of 4000 characters or longer are extremely rare, File Access Manager is designed to handle that limitation.

### **Identifying the Problem**

When using an SQL Server database version 2014 and earlier

The following error message in the Permission Collection Engine log file:

```
System.Data.SqlClient.SqlException (0x80131904): String or binary data would be truncated.
```

In all other cases, this feature should not be enabled.

### **Setting the Long Resource Path Key**


The Permission Collection Engine App.config file is `RoleAnalyticsServiceHost.exe.config`, and can be found in the folder

`%SailPoint_Home%\FileAccessManager\[Permission Collection instance]\`

Search for the key **excludeVeryLongResourcePaths** and correct it as described above.

## Selecting and Scheduling the Data Classification Settings

### **To associate an application with a data classification service, and set the schedule**

- Open the edit screen of the required application
  - a. Navigate to **Admin > Applications**
  - b. Scroll through the list, or use the filter to find the application
  - c. Click the edit icon  on the line of the application
- Press **Next** till you reach the **Data Classification** settings page.

The actual entry fields vary according to the application type

### **Central Data Classification Service**

Associate the application with a Central Data Classification Service. This service is responsible for running the Data Classification tasks.

If the “Central Data Classification” wasn’t installed during the installation of the server, this field is disabled.

### **Disabling Data Classification**

To disable data classification, delete the entry from the central data classification field.

Disabling data classification can also be achieved by setting the scheduler to be inactive (which is the default setting for data classification).

### **Create a Schedule**



This option is enabled only if a central data classification service is selected.

See [Scheduling a Task](#)

See the chapter “Data Classification” in the File Access Manager Administrator Guide for more information

Click **Next** or **Finish**.

### Data Privacy

A user can associate the application with a Central Data Classification Engine Service. This engine will be responsible for executed Data Privacy tasks.

Though using different processes for each, the Data Classification engine service is in charge for both Data Privacy and Data Classification discovery tasks.

You may choose the same service for both, or use a different one for each, to run them in parallel.

The fields on the Data Privacy step are the same as the Data Classification step.

## Installing Services: Activity Monitor and Collectors

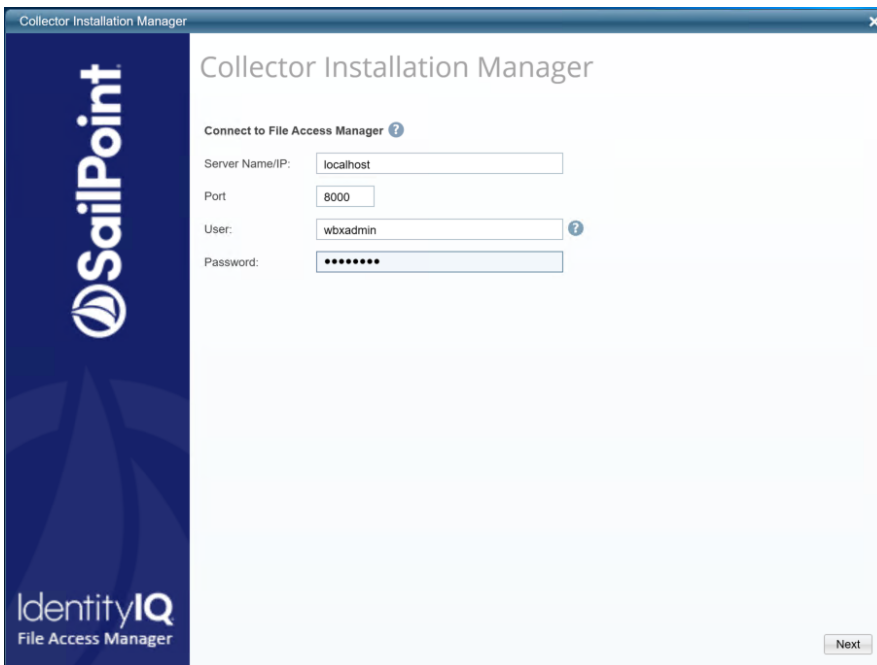
The Collector Installation Manager is part of the File Access Manager installation package. This tool is used to install the activity monitor, permission collector, and data classification collector.

### Activity Monitor

The activity monitor is installed per application, and collects SharePoint Audit entries and IIS activity logs.

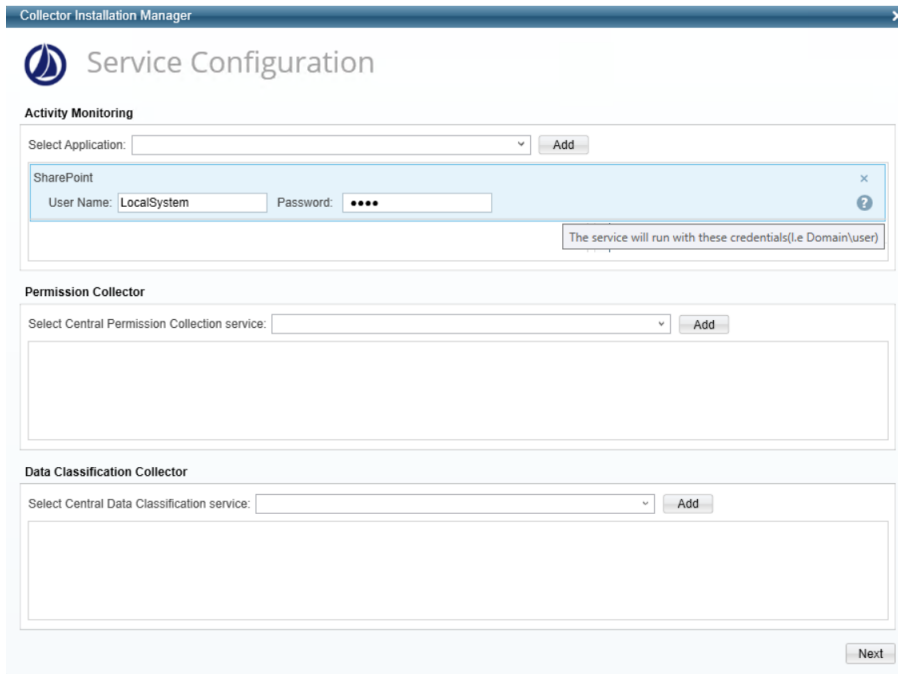
1. Run the **Collector Installation Manager** as an Administrator.  
The installation files are in the installation package under the folder **Collectors**.

The Collector Installation Manager window displays.



2. Enter the credentials to connect to File Access Manager.
  - a. ServerName/IP should be pointed to the Agent Configuration Manager service server.
  - b. An File Access Manager user with Collector Manager permission (permission to install collectors). For Active Directory authentication, use the format domain/username.
3. Click **Next**.

The Service Configuration window displays.



4. When installing a SharePoint Activity Monitor, you will be prompted for service account credentials. This service account will be used by the Activity Monitor service to run the service and authenticate against the SharePoint IIS servers to fetch the logs (“Log on as”). Make sure the service account provided has local administrator privileges on the local server (hosting the Activity Monitor service) and can access the activity logs on the IIS servers.
5. If you are installing the Permission Collector, select the Central Permission Collector to which to connect this service, and click **Add**
6. If you are installing the Data Classification, select the Central Classification Collector to which to connect this service, and click **Add**
7. Click **Next**.

The Installation Folder window displays.

If this is the first time you are installing collectors on this machine, you will be prompted to select an installation folder, in which all future collectors will also be installed.

8. Browse and select the location of the target folder for installation.
9. Browse and select the location of the folder for system logs.
10. Click **Next**.
11. The system begins installing the selected components.
12. Click **Finish**

The Finish button is displayed after all the selected components have been installed.

The *File Access Manager Administrator Guide* provides more information on the collector services.

## Verifying the CTERA Connector Installation

### Installed Services

Verify that the services installed for the connector are available and active. Using windows Service manager, or other tool, look for the File Access Manager services, and see that they are running.

for example:

- File Access Manager Central Data Classification - <Application\_Name> service is running.
- File Access Manager Central Permissions Collection - <Application\_Name> service is running.

### Log Files

Check the log files listed below for errors

- "%SAILPOINT\_HOME\_LOGS%\PermissionCollection\_<Service\_Name>.log"
- "%SAILPOINT\_HOME\_LOGS%\DataClassification\_<Service\_Name>.log"

### Permissions Collection

1. Run the Crawler and Permissions Collector tasks (*Settings > Task Management > Scheduled Tasks*)
2. Verify that:
  - The tasks completed successfully
  - Business resources were created in the resource explorer (*Admin > Applications > [application column] > Manage Resources*)
  - Permissions display in the Permission Forensics page (*Forensics > Permissions*)