Quest

Metalogix® Sensitive Content Manager 2.2

Administration Guide

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Legend

CAUTION: An information icon indicates supporting information.

IMPORTANT, NOTE, TIP, MOBILE OR VIDEO: An information icon indicates supporting information.

Metalogix® Sensitive Content Manager
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Version 2.2

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1

Metalogix Sensitive Content Manager

Metalogix Sensitive Content Manager (SCM) provides a reliable, accurate and flexible solution for detecting sensitive information such as Personally Identifiable Information (PII), Protected Health Information (PHI) and Payment Card Industry (PCI) in English, German, Spanish, Italian, French and Portuguese, within enterprise content management systems.

This guide contains instructions for the administration of Sensitive Content Manager.

Integration with Metalogix ControlPoint and Microsoft SharePoint

SCM can leverage the existing security, compliance and administration capabilities of Metalogix ControlPoint to enforce policies using the full range of Microsoft SharePoint's permissions management, auditing and user activity reporting. With on-demand scanning, administrators can flag specific libraries, sites, or site collections for content discovery, or use real-time content shield by analyzing files as they are created, modified, moved, or destroyed. The combination of SCM and Metalogix ControlPoint offers a powerful Data Loss Prevention (DLP) solution that uses customizable and intelligent scanning subsystems to identify, track, and secure documents. This ensures a more robust level of information governance inside increasingly complex enterprise environments.

Integration with Metalogix Essentials

Essentials and SCM together allow a customer to selectively migrate file-share content based on the sensitive nature of the content after analysis with SCM.

SCM Architecture

Metalogix SCM uses a microservices architecture that is comprised of several services that can be deployed on a single server or distributed across several servers. These services work together to analyze documents using regular expressions and machine learning. The SCM components are described below:

SCM Databases

Each service has its own database which together form the SCM Databases and represent the central repository for the configuration, analysis results and operational metrics of the Metalogix SCM.

Service Bus

Metalogix SCM uses RabbitMQ as the service bus. It provides the intelligent message routing, event queuing and sequencing needed by SCM to analyze the files.

SCM Services (IIS)

- **Admin Portal** - The *SCMAdminPortal* service manages the SCM Administration Center.
- **Admin Services** - These are back-end services that feed information about other services to the SCM Administration Center.
  - *SCMAdminService* is used for license management, monitoring the system health and other administrative operations of SCM.
  - *SCMAdminService-Analytics*
  - *SCMAdminService-Notifications*
  - *SCMAdminService-Profiles*
  - *SCMAdminService-Scans*
  - *SCMAdminService-Subquestions*
- **File Upload Service** - When integrated with Metalogix ControlPoint, the *SCMFileUploadService* receives the requests to analyze one or more files. It stores these files and submits a request to the queue to analyze these files.
- **Profile Service** - A profile is a named collection of content search and analysis guidelines. Each profile is made up of sub-questions, weights and file thresholds. The *SCMProfileService* serves the profiles that are needed for content analysis.
- **Result Service** - When integrated with Metalogix ControlPoint, a REST API call requests the *SCMResultsService* to return the metrics and results of the files that were analyzed by the Analysis Service. Results are kept for a limited period.
- **Subquestion Service** - A sub-question is a search term used to identify a specific kind of sensitive content. The *SCMSubquestionService* serves the entire collection of sub-questions available for use within profiles.
- **Scan Service** - The process of analyzing files in a file-share and the generated report is called a *scan*. The *SCMScanService* allows you to submit, cancel or delete scans, and serves metadata about running scans and scan reports.
- **Analytics Service** - The *SCMAnalyticsService* collects and stores data about analysis throughput. Collected data supports the dashboard experience and is only kept for a limited period.
- **Notification Service** - The *SCMNotificationService* provides live-updates for scan progress, health and notifications within the SCM Administration Center.

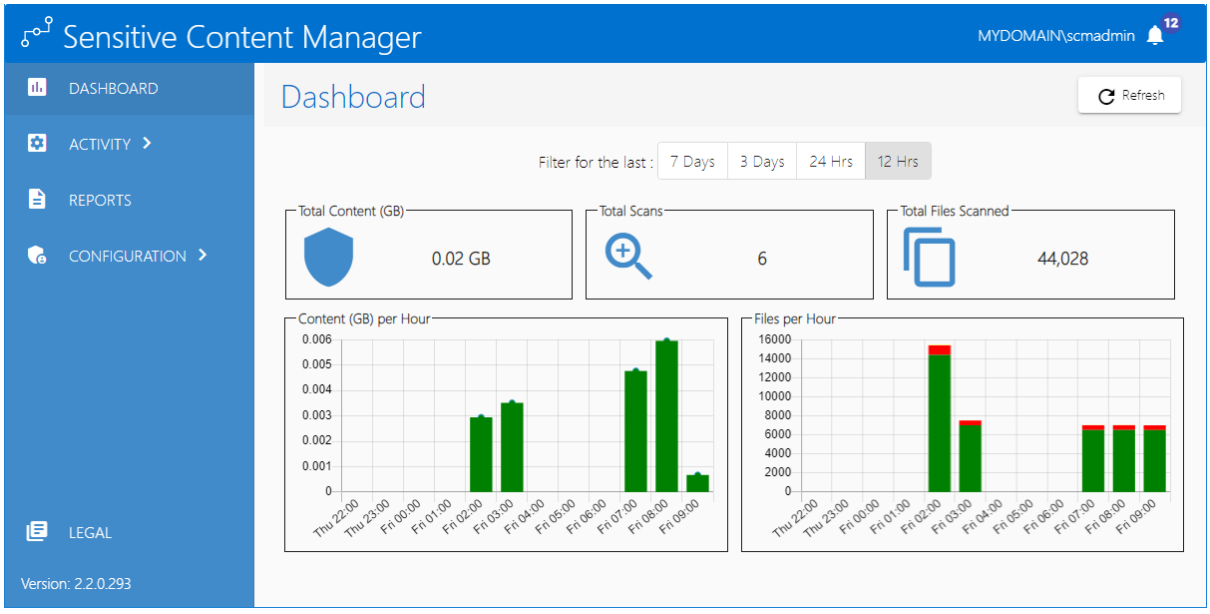
SCM Services (Windows)

- **Document Routing Service** - When files are uploaded for analysis, they are stored in a specific *temporary folder* on the SCM Server. The *Metalogix SCM Document Routing Service* inspects each file from the folder to check whether these files are single files or complex files like compressed files or emails with attachments. Since only single files can be analyzed, this service submits complex files to the **Archive Extraction Service** to extract individual files for analysis. You can analyze the following file types: *Compressed files, Microsoft Office Files, Open Document Text, Portable Document Format, Rich Text Format,* and *Text Document*.
- **Archive Extraction Service** - When complex files are submitted for analysis, the *Metalogix SCM Extraction Service* extracts individual files from the file set.
- **Document Processing Service** - When single files are ready for analysis the *Metalogix SCM Document Processing Service* extracts the content from the files.
- **Analysis Service** - The *Metalogix SCM Analysis Service* analyzes the content in each file using regular expressions and machine learning technology. Sensitive files are permanently deleted from the *temporary folder* when the analysis is completed.
- **Crawler Service** - The *Metalogix SCM Crawler Service* inspects the contents of a file-share and the sub-folder hierarchy for supported files that are submitted for analysis.

SCM Administration Center

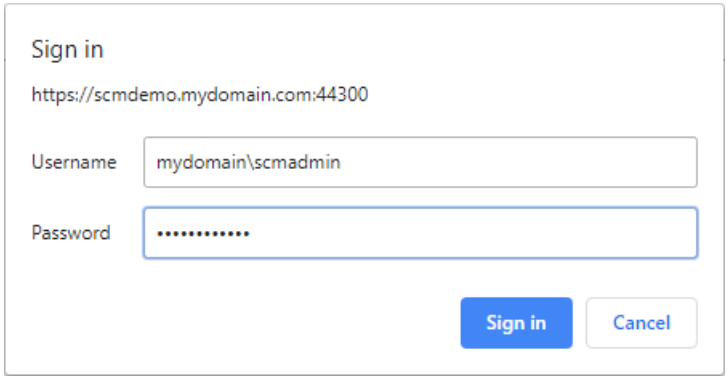
The SCM Administration Center provides an overview of the scan results and lets administrators manage licenses, monitor the system health, and work with system logs to analyze the health of services with greater granularity.

NOTE: The installed version is indicated at the bottom of the navigation panel.



Steps to open the SCM Administration Center

1. Log in to the SCM Server.
2. Double-click the desktop shortcut to open the SCM Administration Center. You can also enter the URL directly in a browser. To get the URL for your own installation see Steps to get the URL for the SCM Administration Center.
3. In the *Sign in* dialog that opens, enter the credentials of the SCM Administrator.



4. Click **Sign In**. The *License Information* page opens by default.
5. You can navigate to any administration feature accessible with your license.

2

Dashboard

The Dashboard is the default page that opens when you log in to the SCM Administration Center. It provides a snapshot of the scan results over a pre-selected period and helps you to inspect the scans in greater detail.

Refreshing the dashboard data

Since the Dashboard presents a snapshot of the scans, you must click Refresh to update the snapshot to view the performance of any scans that are in progress.

Dashboard filters

The Dashboard provides four preset filters to present data about past and present scans. Click any preset filter to get the data for that period.

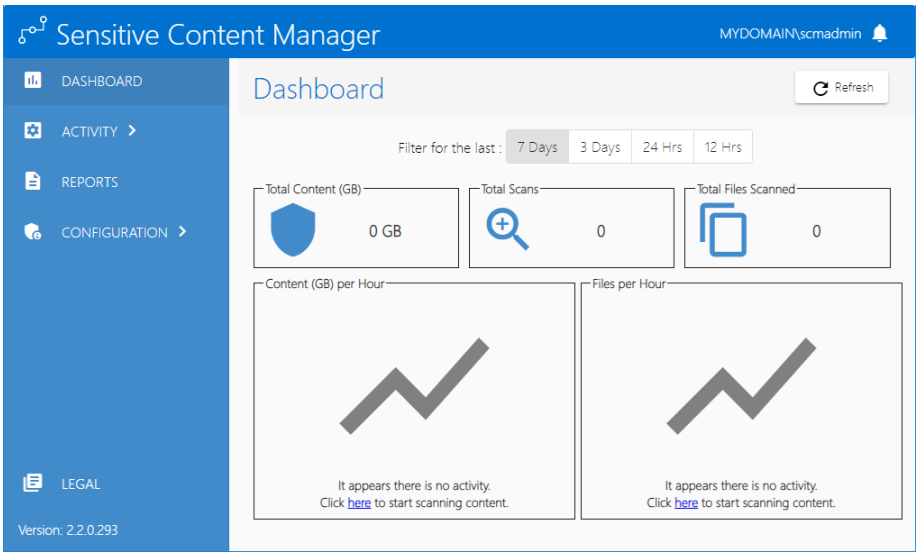
7 Days - presents scan data from the scans that started within the last seven days. This is the default selection.

3 Days - presents scan data from the scans that started within the last three days.

24 Hrs - presents scan data from the scans that started within the last 24 hours.

12Hrs - presents scan data from the scans that started within the last 12 hours.

NOTE: If there are no scans that are in progress or completed within the period filter that you select, you will see empty panels in the Dashboard.



Click the hyperlink in the line **Click here to start scanning content** to submit a scan report and start a scan.

Dashboard panels

There are five panels on the Dashboard as described below:

Total Content (GB)

This panel displays the latest snapshot of the total size of data (in GB) processed within the period selected from the filter.

Total Scans

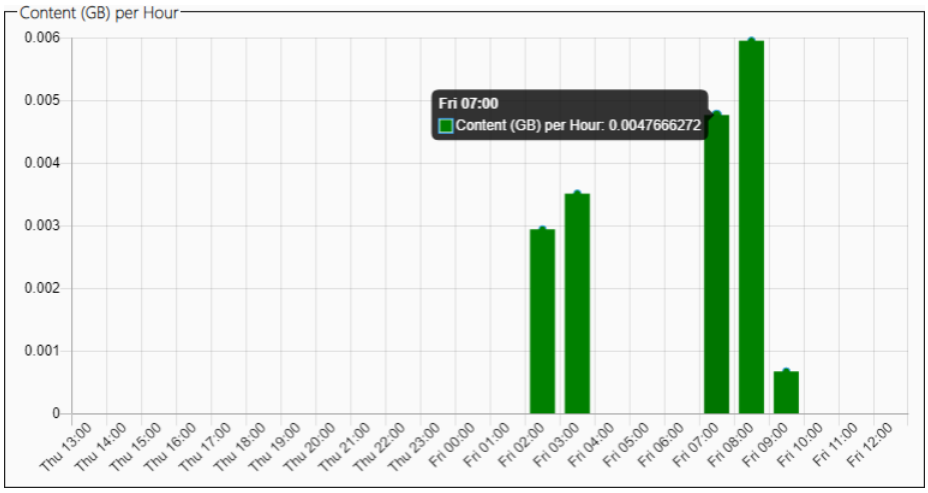
This panel displays the latest snapshot of the number of scans that started within the period selected from the filter. When the snapshot is taken, the scans could be in one of the following states: *In Progress*, *Canceling*, *Canceled*, or *Completed*.

Total Files Scanned

This panel displays the latest snapshot of the total number of scanned files within the period selected from the filter.

Content (GB) per Hour

This chart displays the latest snapshot of the total size of the data (in GB) processed per hour within the period selected from the filter. A line chart is displayed if the period filter is either **7 Days** or **3 Days**. A bar chart is displayed if the period filter selected is either **24 Hrs** or **12 Hrs**. When you hover your mouse over a line or bar, the **Content (GB) per hour** parameter is displayed.



Files per Hour

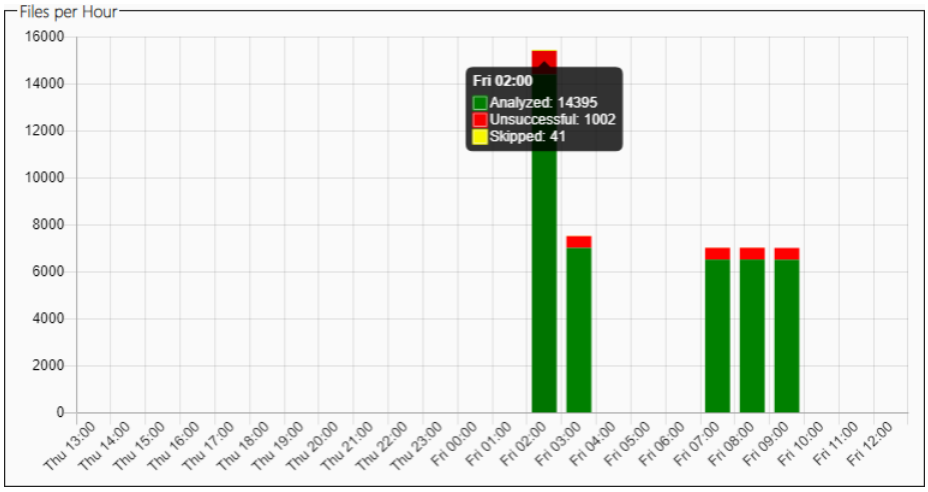
This chart displays the latest snapshot of the total number of files processed per hour within the period selected from the filter. A line chart is displayed if the period filter is either **7 Days** or **3 Days**. A stacked bar chart is displayed if the period filter is either **24 Hrs** or **12 Hrs**.

The line or bar chart has three data points. When you hover your mouse over a line or bar, the following data points are displayed:

a. **Analyzed** - indicates the number of files that were successfully analyzed.

b. **Unsuccessful** - indicates the number of files that could not be analyzed.

c. **Skipped** - the number of files that could not be submitted and were not processed any further. There could be several reasons why files are skipped. For example, files may be skipped because the file type is not supported, there is a problem reading the contents of the file, there is low disk space on the server, or the file upload service was unavailable.



Content Processed by Service

To access this chart, click the **Content (GB) per Hour** chart in the Dashboard.

This chart displays the latest snapshot of the total size of the data (in GB) processed by each service per hour within the period selected from the filter. A line chart is displayed if the period filter is either **7 Days** or **3 Days**. A grouped bar chart is displayed if the period filter is either **24 Hrs** or **12 Hrs**.

If you have a distributed deployment, an additional filter is available that lets you select the server node to inspect the performance of services installed on that node.

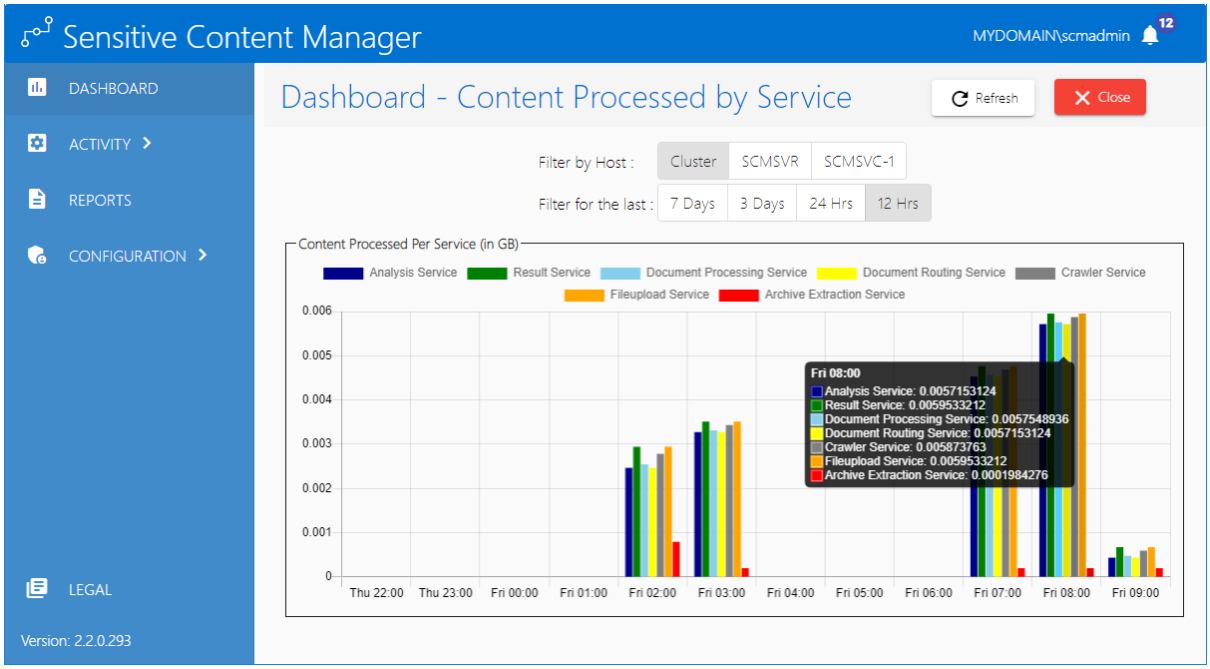


Chart operations:

1. Hover your mouse over a line or bar to view the number of files processed by each service. You can inspect the performance for all the services or you can choose specific services that you want to inspect.
2. Click any service or its color code that you want to exclude from the chart. The service name that is excluded will be indicated with a *strikethrough*.

3. Click the service (or its color code) that was previously excluded and you want to include in the chart. The *strikethrough* disappears from service names that are included in the chart.
4. Click **Refresh** to get a fresh snapshot of the chart data.
5. Click **Close** to return to the Dashboard.

Files Processed by Service

To access this chart, click the **Files per Hour** chart in the Dashboard.

This is a detailed chart that displays the latest snapshot of the total number of files processed by each service per hour within the period selected from the filter. A line chart is displayed if the period filter is either **7 Days** or **3 Days**. A grouped bar chart is displayed if the period filter is either **24 Hrs** or **12 Hrs**.

If you have a distributed deployment, the **Filter by Host** is an additional filter that is available that lets you select the server node to inspect the performance of the services installed on that node. The default is **Cluster** which includes services from the primary SCM server as well as the server nodes.

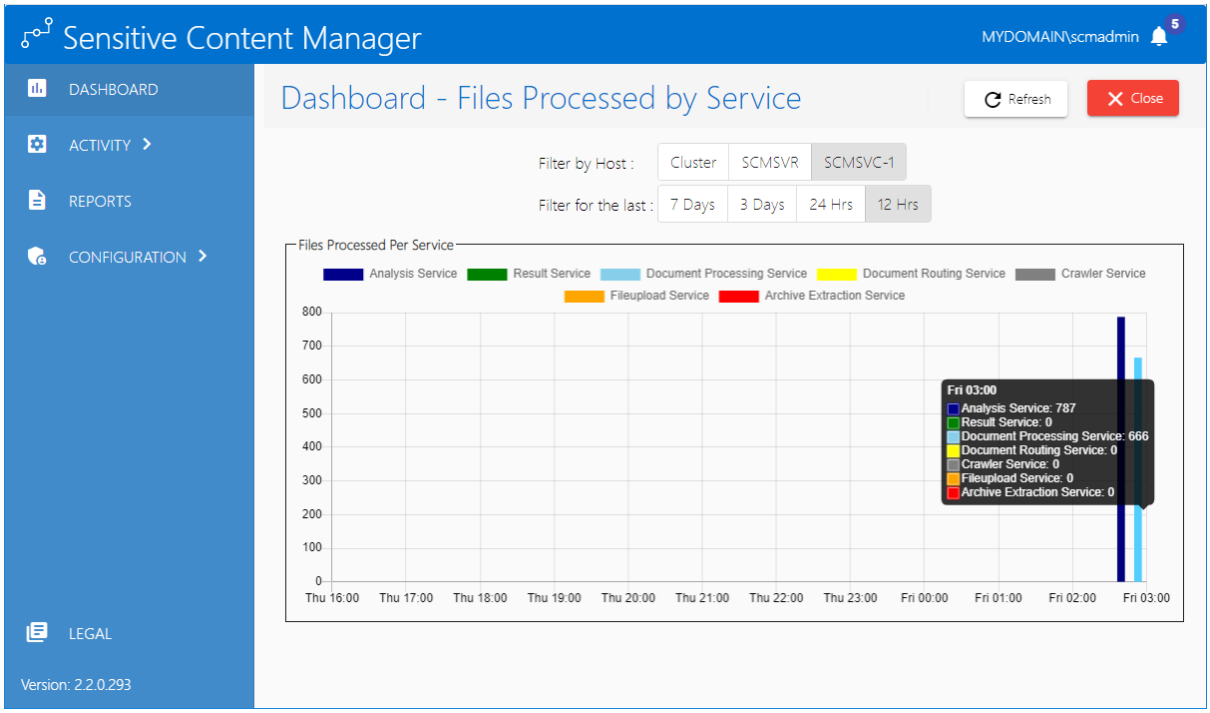


Chart operations:

1. Hover your mouse over a line or bar to view the number of files processed by each service. You can inspect the performance for all the services or you can choose specific services that you want to inspect.
2. Click any service (or its color code) that you want to exclude from the chart. The service name that is excluded will be indicated with a *strikethrough*.

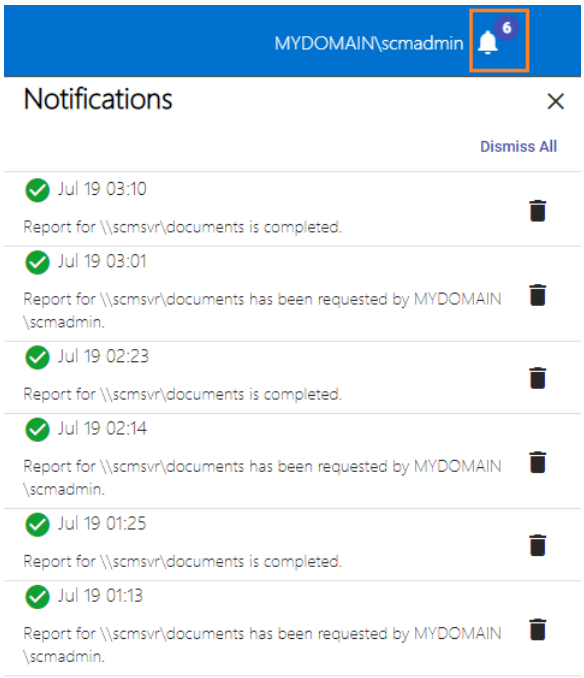
3. Click the service (or its color code) that was previously excluded that you want to include in the chart. The *strikethrough* disappears from service names that are included in the chart.
4. Click **Refresh** to get a fresh snapshot of the chart data.
5. Click **Close** to return to the Dashboard.

3

Notifications

Notifications are messages about the progress of scan reports.

To view the notifications click the notification icon at the top right corner of the SCM Administration Center. The notification icon all indicates the number of messages in the notification panel.



The *Notifications* panel displays the date and time the message was posted and the message. The You can perform the following actions in the *Notifications* panel:

1. Click **X** to close the panel.
2. Click **Dismiss All** to clear all the messages from the panel.
3. Click 🗑 to delete a single message.

4

License Management

The *License Information* page of the SCM Administration Center lets you to register your product and view your license details. When you download and install a trial version of Metalogix SCM you get a free 30-day trial license. If you would like to purchase a license, contact Quest to get your license key and follow the instructions presented here.

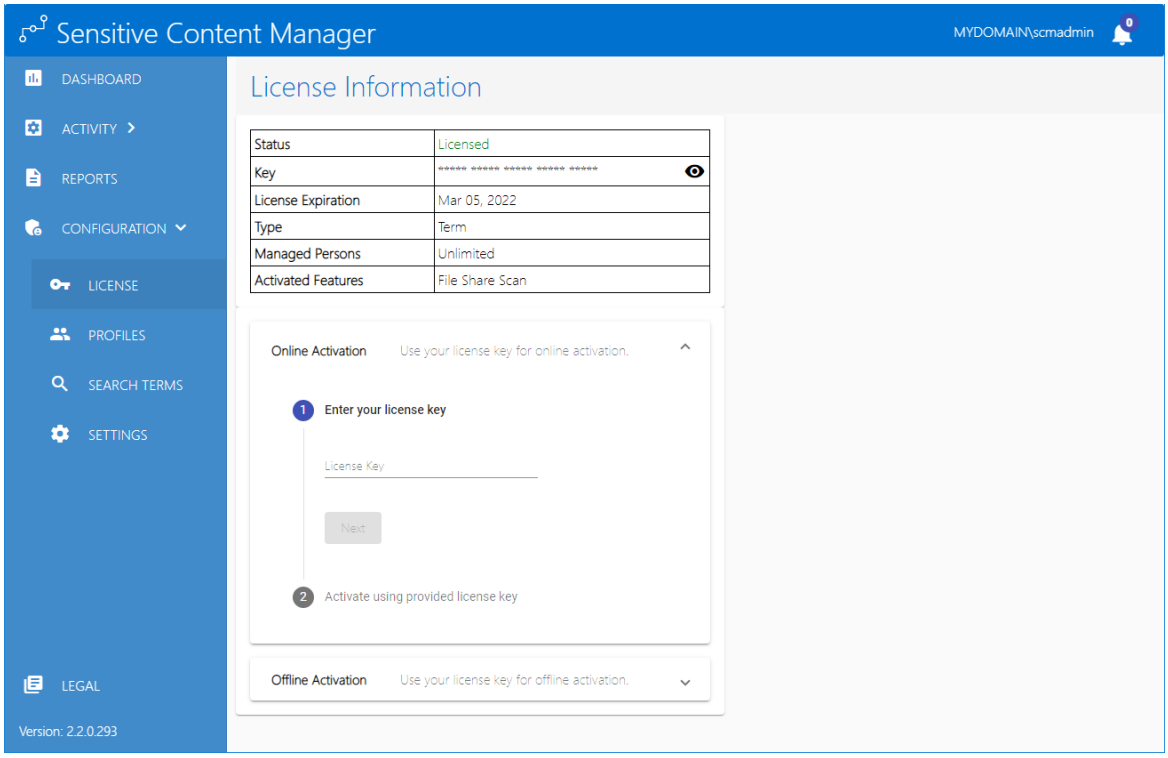
NOTE: You must reactivate your license after an upgrade to ensure new license-linked features are synchronized with your license.

In this topic

- Steps to view the license information
- About the trial License
- Steps to activate your license online
- Steps to activate your license offline

Steps to view the license information

1. From the navigation panel click **LICENSE**. The *License Information* page opens.



The information about the license that is displayed on this page is described below:

Status - the current state of your license. Valid values are **Licensed** and **Unlicensed**.

Key - The encrypted license key that controls the features activated in SCM. Click the eye icon to view the password.

License Expiration - Date when the license will expire.

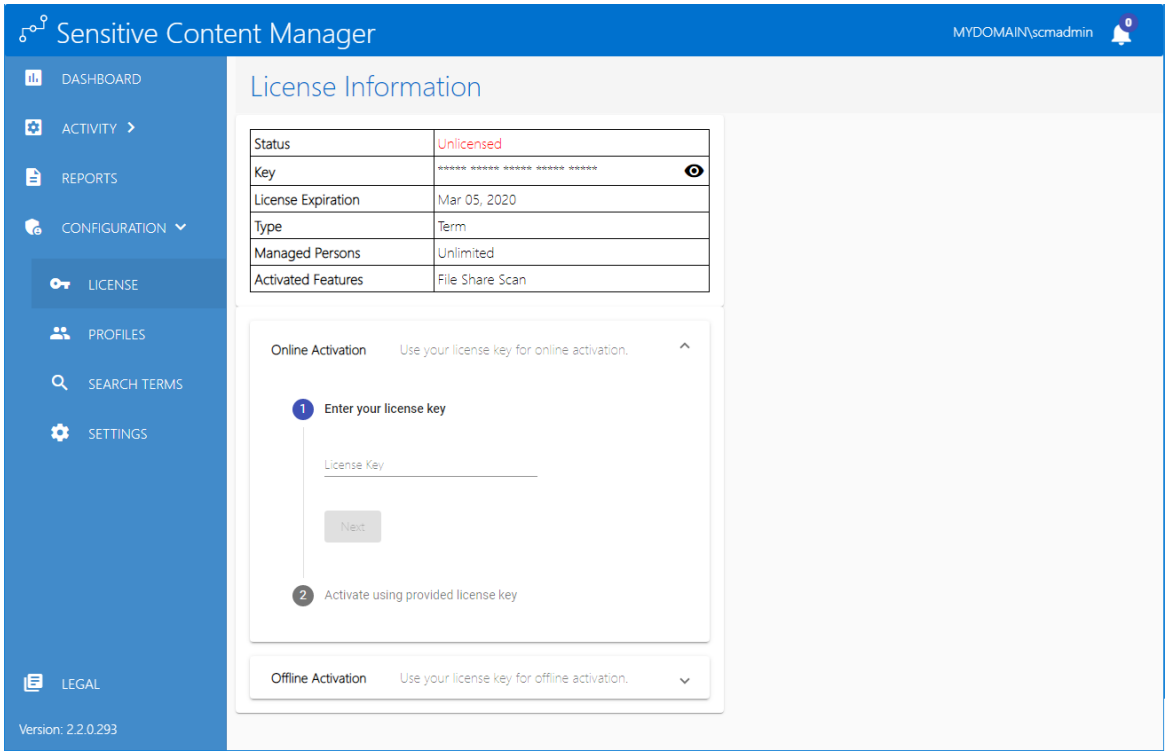
Type - Nature of the license. A **Term** license indicates that a specific end date is present.

Managed Persons - number of licensed users.

Enabled Features - Indicates that the **File Share Scan** feature has been activated through the license. When this feature is activated, the Reports section in the navigation panel will be displayed. For more information see Reports.

> **NOTE:** When you upgrade your version, you must reactivate your license key to activate the new features. For example, when the **File Share Scan** feature is activated, the *License Information* panel displays additional information like **Managed Persons** and **Enabled Features**. In addition to these, the **Reports** section in the navigation panel will be displayed. For more information see Reports.

2. If the license has expired, the *License Information* page will indicate the details of the expired license.



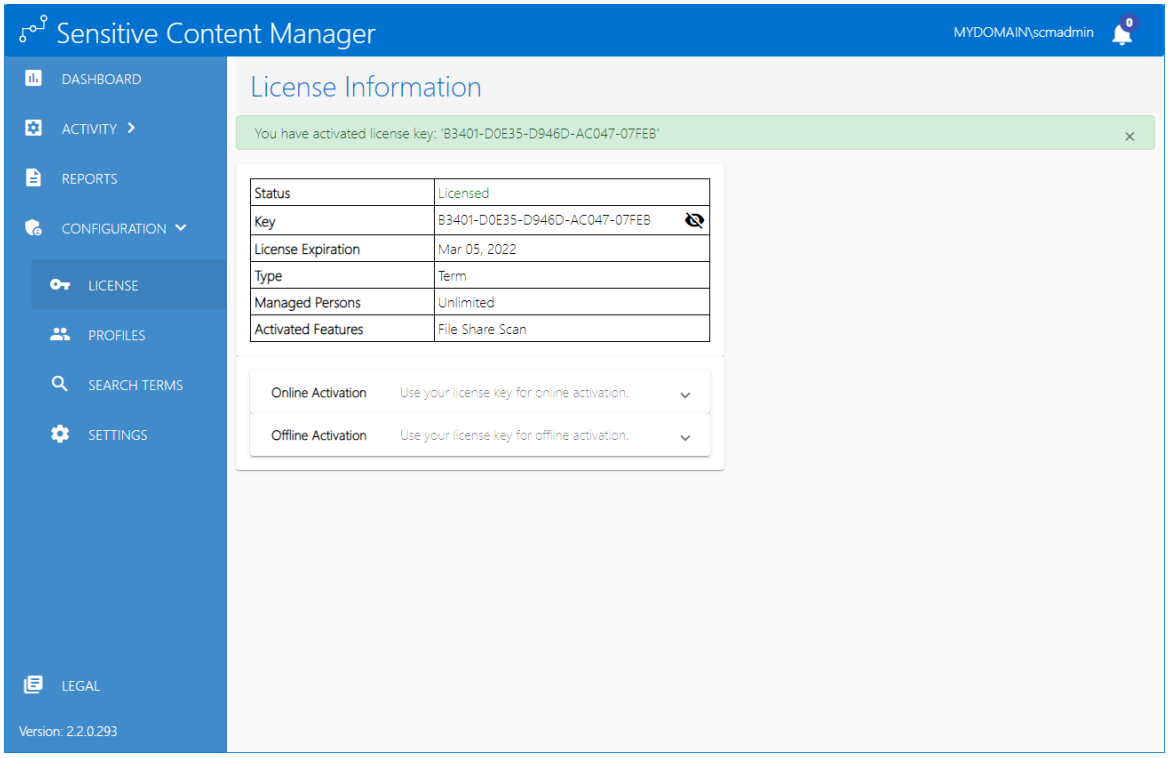
3. Contact your Quest sales representative to renew your license.

About the trial License

- When you register and download a trial version of the Metalogix SCM, the trial license key is specified in the email that is sent to you.
- When you activate the trial license, the *License Information* page opens.
- The **Type** field indicates *Trial*.
- It is valid for 30 days (date of license issue + 29 days) and you can try all the features that are available.
- The Analysis service and the File Upload service will stop functioning after 30 days.

Steps to activate your license

1. Log in to the SCM Administration Center and click **License** from the navigation panel. The *License Information* page opens.
2. Enter you license key in the **License Key** field.
3. Click **Next**. The **Activate using provided license key** step is activated**.**
4. Click **Activate Online**. If the **License Key** is valid, The **Activation Complete** step is activated.



5. Click **Finish**. Refresh the page to update the license status and access the licensed features.

Steps to activate your license offline

This option lets you access the Quest offline activation web site when you have a working internet connection.

1. Log in to the SCM Administration Center and click **License** from the navigation panel. The License Information page opens.
2. Expand the **Offline Activation** section.
3. **Step 1: Enter your license key**
   a. In the **License Key** field, enter your license key and click **Next**.
4. **Step 2: Get Activation Data**
   a. Click **Get Activation Data**.
   b. When the data is available, the next step is activated
5. **Step 3: Copy/Save activation data**
   a. Select from the two options described below:

   Option 1: Click **Save Activation Data to Clipboard**. The activation data is saved to memory. Use this option if you plan to follow through with the subsequent steps immediately.

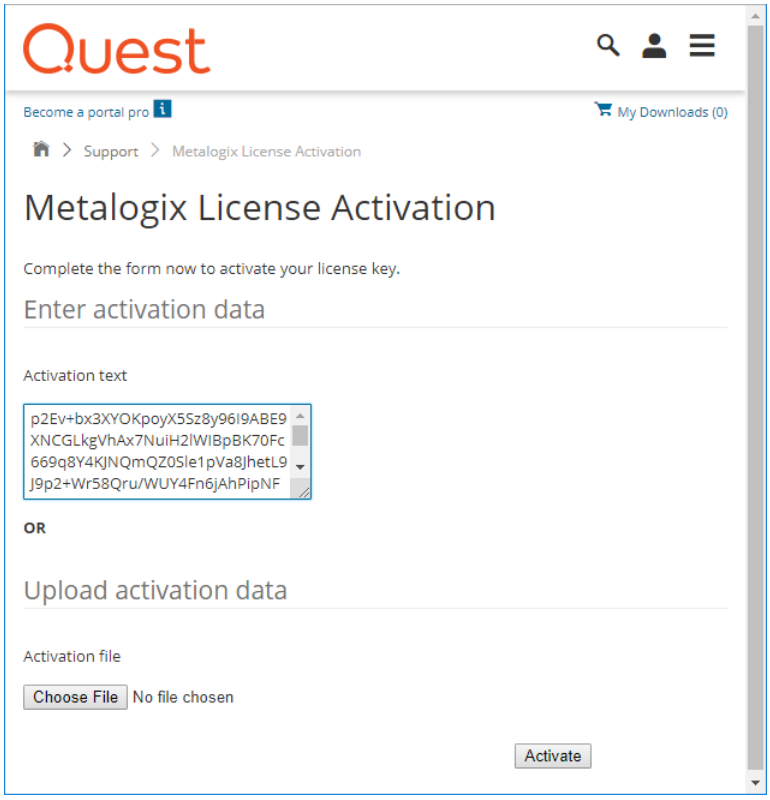
   Option 2: Click **Save Activation Data to File**. The Windows File dialog opens. Use this option if you plan to activate the license later. Specify a file name for the activation data file and click **Save** to save the file to a location of your choice.

6. **Step 4: Submit Activation Data**

   a. Using your alternate internet connection navigate to https://support.quest.com/offline-activation.

   b. In the previous step, if you opted to click **Save Activation Data to Clipboard**, place your cursor in the **Activation text** field and click **Ctrl-V** to paste the activation data.

   c. In the previous step, if you opted to click **Save Activation Data to File**, click **Choose File** and locate the saved activation data file.

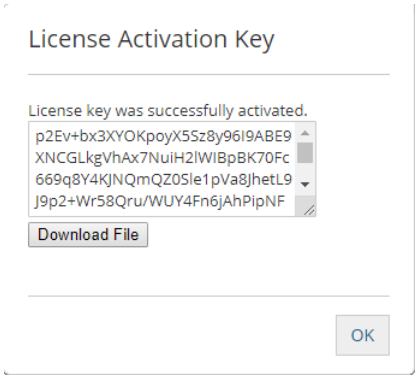


   d. Click **Activate**. The *License Activation Key* dialog opens.

   e. Copy the encrypted activation key to memory by selecting the activation key and using Ctrl-C

   or

   Click **Download File** which will download the **LicenseActivationResponse.dat** file to your computer. If you downloaded the file to a location that is on another computer, make sure you copy the file to the computer where you are installing the Metalogix SCM software.



f. Return to the *License Information* page in the SCM Administration Center.

7. **Step 5: Apply Activation Response**

   a. Click **Ctrl + V** to paste the activation response if you copied the activation response to clipboard.

   or

   b. Click **Choose File**. The Windows file dialog opens.

   c. Locate the activation key file that you saved if you followed step 6b and click **Open**. The file name opens next to the **Choose File** button.

   d. Click **Complete Activation** to complete the activation process.

8. **Step 6: Activation Complete**

   a. Click Finished to acknowledge the license activation.

   b. Log out and log in again to access all the licensed features.

5

Activity

This section describes the information that is collected about the system. The following topics are described in this chapter:

- Services Health
- Work In Progress
- Logs

Services Health

The *Services Health* page presents information about the servers, services and service status that comprise a standalone or distributed SCM deployment in your organization.

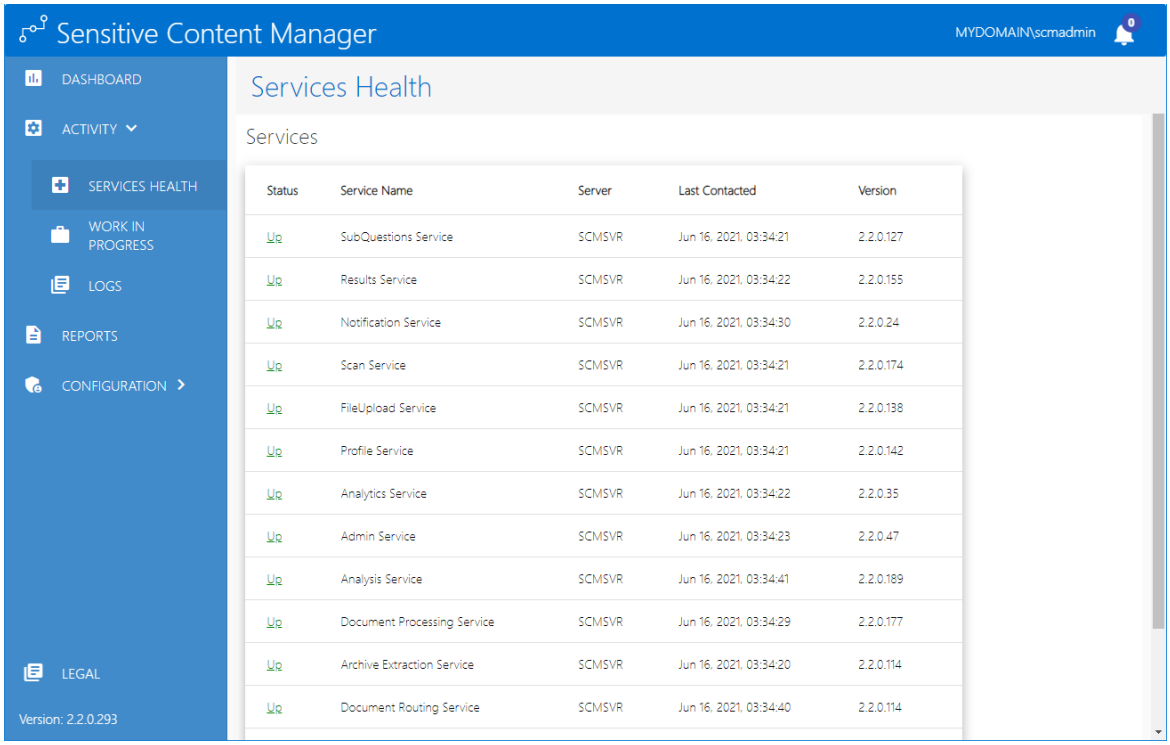
In this topic

Steps to view the Services Health page

About the Services Health page

Steps to view the Services Health page

1. From the navigation panel, expand **ACTIVITY** and then click **SERVICES HEALTH**. The Services *Health* page opens.



About the Services Health page

The *Services Health* page presents a snapshot of the overall health of the system. It is frequently updated with the latest status from the SCM repository. This section displays the following information about the SCM services.

a. **Status** - indicates the health of the service. The two possible values are: **Up** and **Down**. Click the status link to view details about the service. For the *Analysis Service* and the *Document Processing Service*, the details also include the set of documents that are currently being processed.

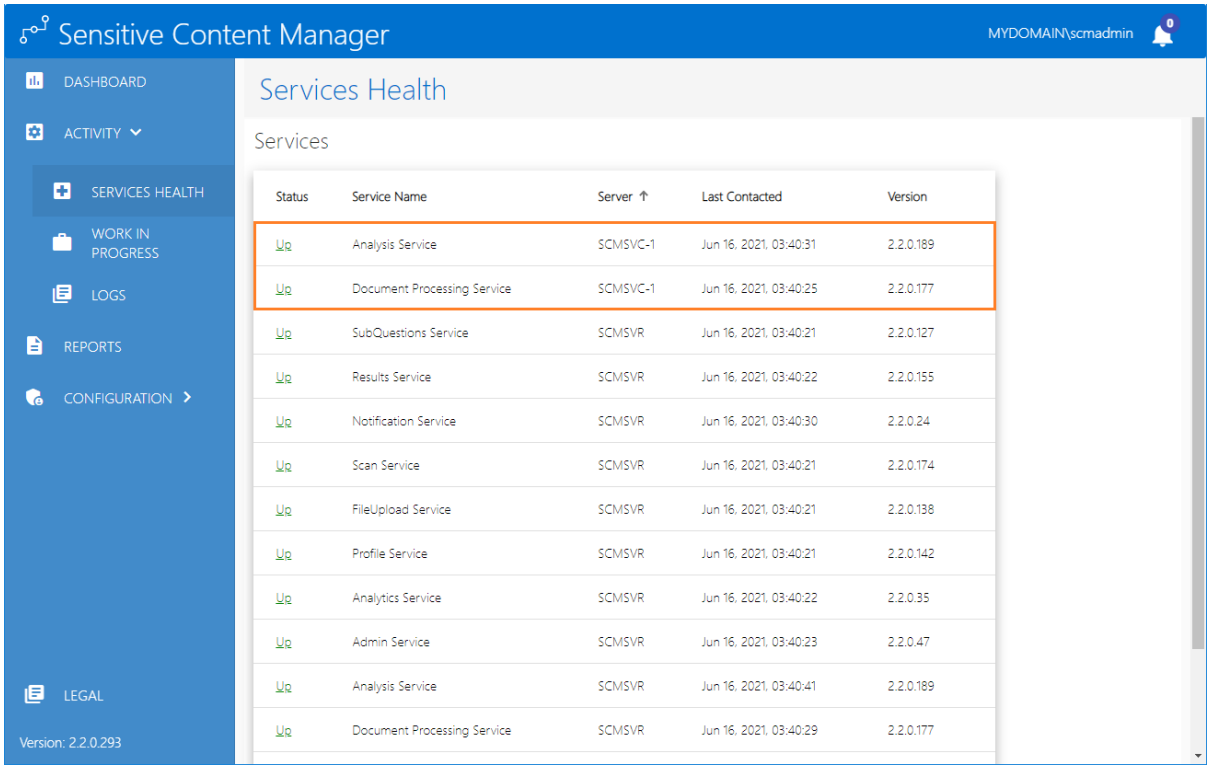
b. **Service Name** - name of the service.

c. **Server** - name of the server where the service is installed.

d. **Last Contacted** - most recent date and time when the service published health information.

e. **Version** - the version of the service that is installed on the server.

In a distributed environment, additional servers that are deployed to host one or more services will also be displayed along with the service and other health information.


Sensitive Content Manager
MYDOMAIN\scmadmin
DASHBOARD
ACTIVITY
SERVICES HEALTH
WORK IN PROGRESS
LOGS
REPORTS
CONFIGURATION
LEGAL
Version: 2.2.0.293
Services Health
Services
Status
Service Name
Server
Last Contacted
Version
Up
Analysis Service
SCMSVC-1
Jun 16, 2021, 03:40:31
2.2.0.189
Up
Document Processing Service
SCMSVC-1
Jun 16, 2021, 03:40:25
2.2.0.177
Up
SubQuestions Service
SCMSVR
Jun 16, 2021, 03:40:21
2.2.0.127
Up
Results Service
SCMSVR
Jun 16, 2021, 03:40:22
2.2.0.155
Up
Notification Service
SCMSVR
Jun 16, 2021, 03:40:30
2.2.0.24
Up
Scan Service
SCMSVR
Jun 16, 2021, 03:40:21
2.2.0.174
Up
FileUpload Service
SCMSVR
Jun 16, 2021, 03:40:21
2.2.0.138
Up
Profile Service
SCMSVR
Jun 16, 2021, 03:40:21
2.2.0.142
Up
Analytics Service
SCMSVR
Jun 16, 2021, 03:40:22
2.2.0.35
Up
Admin Service
SCMSVR
Jun 16, 2021, 03:40:23
2.2.0.47
Up
Analysis Service
SCMSVR
Jun 16, 2021, 03:40:41
2.2.0.189
Up
Document Processing Service
SCMSVR
Jun 16, 2021, 03:40:29
2.2.0.177

Work In Progress

The *Work in Progress* page presents information about the queues that transport data in a standalone or distributed SCM deployment in your organization.

In this topic

[Steps to view the Work In Progress page](#)

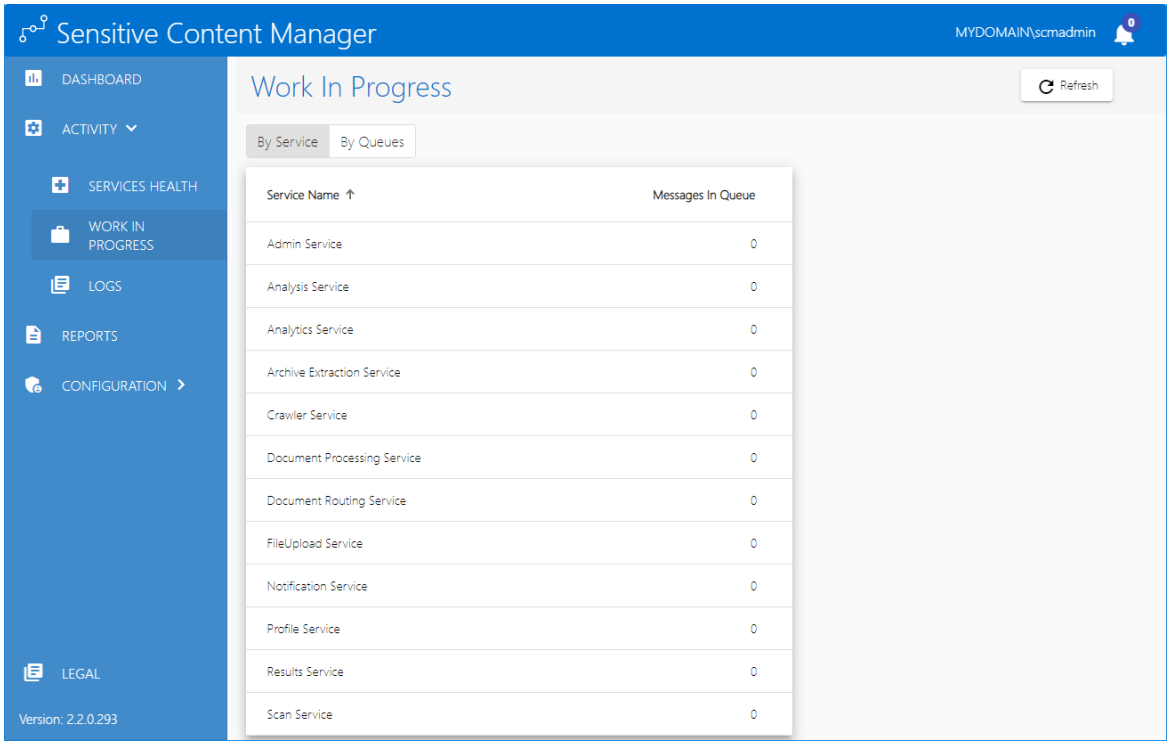
[About the Work In Progress page](#)

Steps to view the Work In Progress page

1. From the navigation panel, expand **ACTIVITY** and then click **WORK IN PROGRESS**. The *Work In Progress* page opens.
2. Click **By Service** tab to view the messages in the service queues.

   -or-

   Click **By Queues** tab to view the messages in each queue.



About the Work In Progress page

The *Work In Progress* page presents a snapshot of the number of messages in various queues. Click **Refresh** to retrieve and display the latest message counts from the SCM repository. This page has two sections as described below:

By Service

This tab displays the following information about the service queues. A service queue could have one or more message queues that transport data.

a. **Service Name** - name of the service queue.

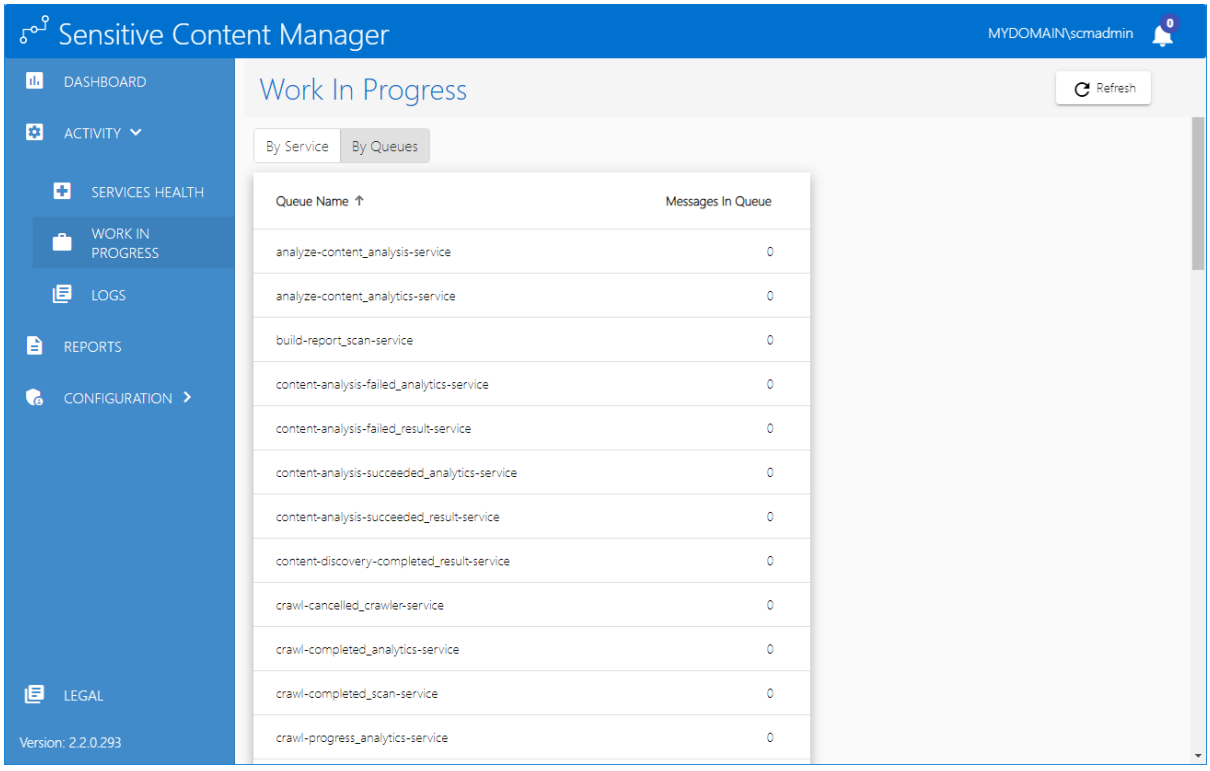
b. **Messages in Queue** - number of messages across all the queues in the service. Click **Refresh** to update the information on this page.

By Queues

This tab displays the following information about the service queues.

a. **Queue** - name of the message queue. The format of the name is *message-category_service-name*.

b. **Messages in Queue** - number of messages in the queue. Click **Refresh** to update the information on this page.



Click **Refresh** to update the information on this page.

Logs

The *Logs* page displays collected details about application service events.

In this topic

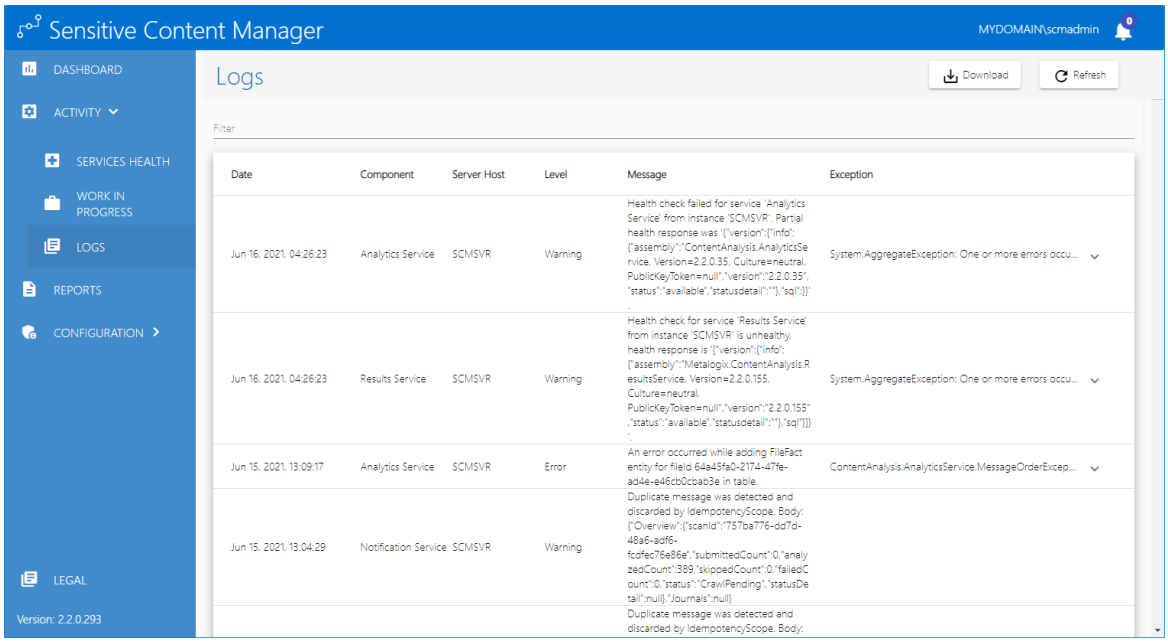
[Steps to view the Logs page](#)

[About the Logs page](#)

[Exporting Logs](#)

Steps to view the Logs page

1. From the navigation panel, expand **ACTIVITY** and then click **LOGS**. The *Logs* page opens.



About the Logs page

The **Logs** list presents the information about the system and services as described below. You can sort and filter each column in the **Logs** list. The filter recognizes a keyword and does not support logical operators or wildcard characters. The columns in the **Logs** list are described below:

a. **Date** - local date and time when the log entry was written.

b. **Component** - name of the SCM service.

c. **Server Host** - name of the saver where the SCM service is hosted.

d. **Level** - granularity level of the log. See Settings for more information about managing the log level.

e. **Message** - information about the log entry.

f. **Exception** - detailed error description when the log level is an **Error**.

- To customize the number of items displayed on the page, click the **Items per page** drop down below the list and choose the number of items you wish to display. If there are more profiles than the list can display, you can use the navigation links below the list to browse through more profiles.
- Enter a keyword in the **Filter** field above the list to filter the logs by the keyword entered.
- Click **Refresh** to retrieve and display the latest log entries from the SCM repository.

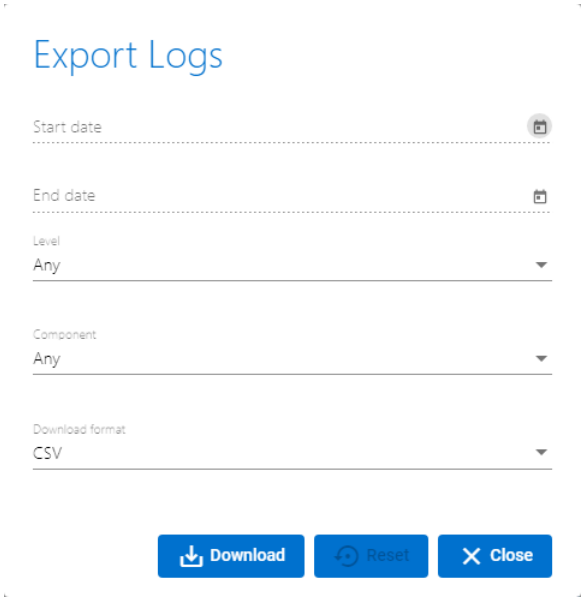
Exporting Logs

The *Export Logs* dialog provides a filter with which a user can specify the criteria for exporting SCM log data.

- Steps to export Logs
- About the Export Logs search criteria

Steps to export Logs

1. From the navigation panel, click **ACTIVITY** and then click **LOGS**. The *Logs* page opens.
2. Click **Download**. The *Export Logs* dialog open.



3. Specify the export criteria and click **Download.** The data is exported to the *exportLogs.csv* or *exportLogs.json* file as specified in the **Download format** field.

About the Export Logs search criteria

The search criteria are described below.

a. **Start Date** - date from when the logs will be exported.

b. **End Date** - date until when the logs will be exported.

c. **Level** - log level to export. Possible choices are: **Any**, **Verbose**, **Debug**, **Information**, **Warning**, **Error** and **Fatal**.

d. **Component** - name of the SCM Service. Possible choices are: **Any**, **Admin Service**, **Analysis Service**, **Archive Extraction Service**, **Crawler Service**, **Document Routing Service**, **Document Processing Service**, **File Upload Service**, **Profile Service**, **Results Service**, **SubQuestions Service** and **Scan Service**.

e. **Download format** - select from CSV or JSON.

f. Click **Export** to export the results or **Reset** to clear the criteria. Click **Close** to close the *Export Logs* dialog.

6

Reports

Reports are the results of a scan across one or more files that is initiated from the *Reports* page.

In this chapter

- About Active Reports
- Steps to create a new report
- Steps to cancel a report
- Steps to delete a report
- Steps to view report details
- Working with the Report Details page

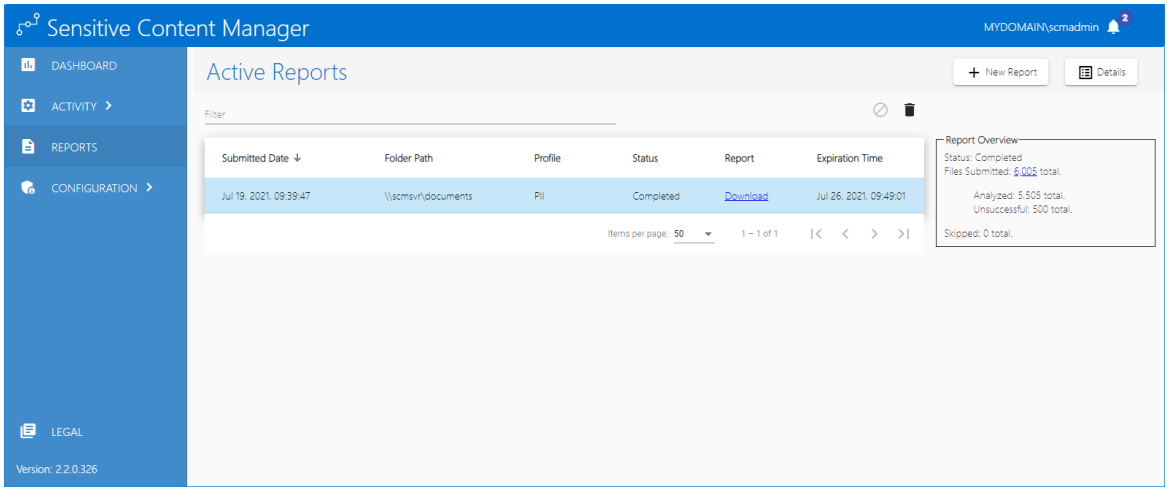
About Active Reports

1. From the navigation panel on the left, click **REPORTS**. The *Active Reports* page opens.

   The Active Reports page lists both in-progress and completed scans with a high-level overview of the scans. For scans that are in-progress, this overview provides information about the current progress. For completed scans, this overview provides information about the result of the scan. The scan reports are retained in the system with links to download the associated report for scans that were completed.

   Common scan management actions like creating, canceling or deleting a scan are available from this page.

   This page also provides links to interactive scan details for each file for a selected scan report.



- To customize the number of items displayed on the page, click the **Items per page** drop down below the list and choose the number of items you wish to display. If there are more scan reports than the list can display, you can use the navigation links below the list to browse through more scan reports.
- Enter a word in the **Filter** field above the list to filter the set of scan reports by the word entered.

The columns in the list are as follows:

a. **Submitted Date** - date and time when the scan was submitted.

b. **Folder Path** - the UNC location of the root folder that contains one or files or folders to be analyzed.

c. **Profile** - Name of the profile used in the scan.

d. **Status** - indicates the state of the scan. Valid values are *In Progress, Canceling, Canceled* and *Completed*.

e. **Report** - link to download the report. If the report status indicated **In Progress** or **Canceled**, the link does not appear because the report does not exist.

f. **Expiration Time** - the date and time until when the report will be active. This date and time depend on the retention period that you selected when the scan was created.

Report Overview

a. **Status** - indicates the state of the scan. Valid values are *In Progress, Canceling, Canceled* and *Completed*.

b. **Files Submitted** - the number of files that could be analyzed and have been submitted for analysis by the system. When the **Status** indicates *In Progress*, this value will be incremented every time a file is submitted for analysis. When the **Status** indicates *Completed*, this value will indicate the total number of files that were submitted for analysis.

c. **Analyzed** - indicates the subset of the **Files Submitted** that were successfully analyzed. When the **Status** indicates *In Progress*, this value will be incremented every time a file is successfully analyzed. When the **Status** indicates *Completed*, this value will indicate the total number of files that were successfully analyzed.

d. **Unsuccessful** - indicates the subset of the **Files Submitted** that could not be analyzed. When the **Status** indicates *In Progress*, this value will be incremented every time a file could not be analyzed. When the **Status** indicates *Completed*, this value will indicate the total number of files that could not be analyzed.

e. **Skipped** - the number of files that could not be submitted and were not processed any further. There could be several reasons why files are skipped. For example, files may be skipped because there was a problem reading the contents of the file or due to low disk space on the server, or the file upload service was unavailable.

NOTE: The information presented can be used to verify the scan in the following ways:

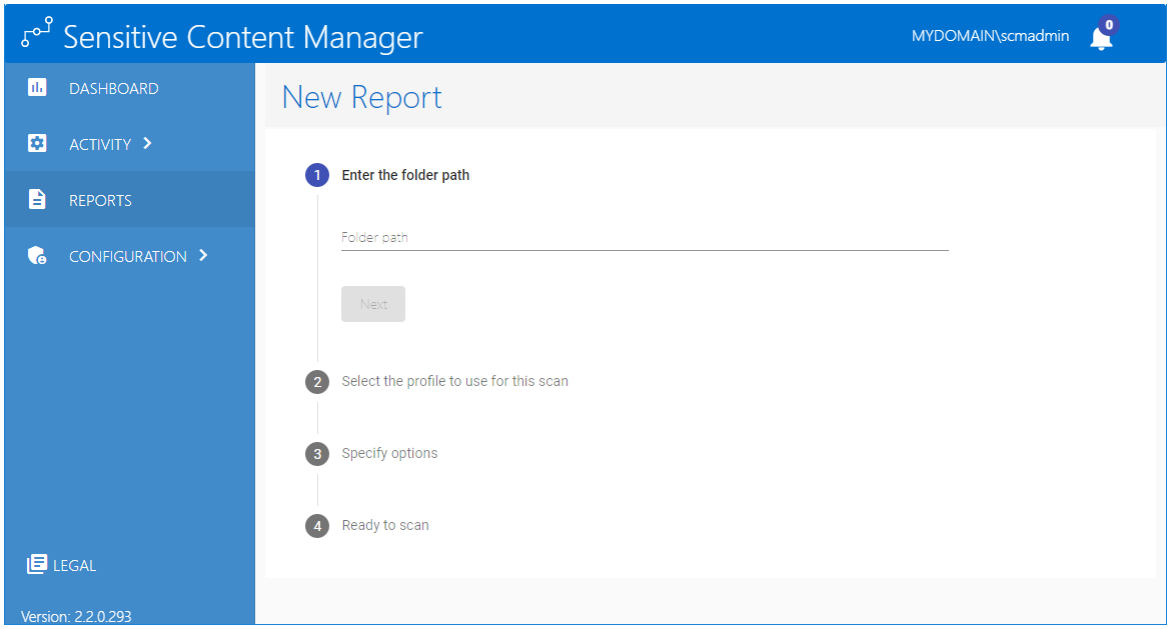
a. **Submitted** + **Skipped** should equal the number of files on the target share unless the scan service was denied accessing in one or more sub-folders due to permissions set on those sub-folders.

b. **Analyzed** + **Unsuccessful** should equal the **File Submitted** count.

2. Click the **Download** link of a report to export the details in a CSV file or click **Details** to view the information about the scan.

Steps to create a new report

1. From the navigation panel on the left, click **REPORTS**. The *Active Reports* page opens.
2. Click **New Report**. The New Report page opens. This page presents the information that is necessary to create the scan necessary for the report.



Specify the information for the scan as described below:

a. **Enter the folder path** - enter the UNC path to the root folder that contains the documents or sub-folders with documents that must be scanned. Then click **Next**.

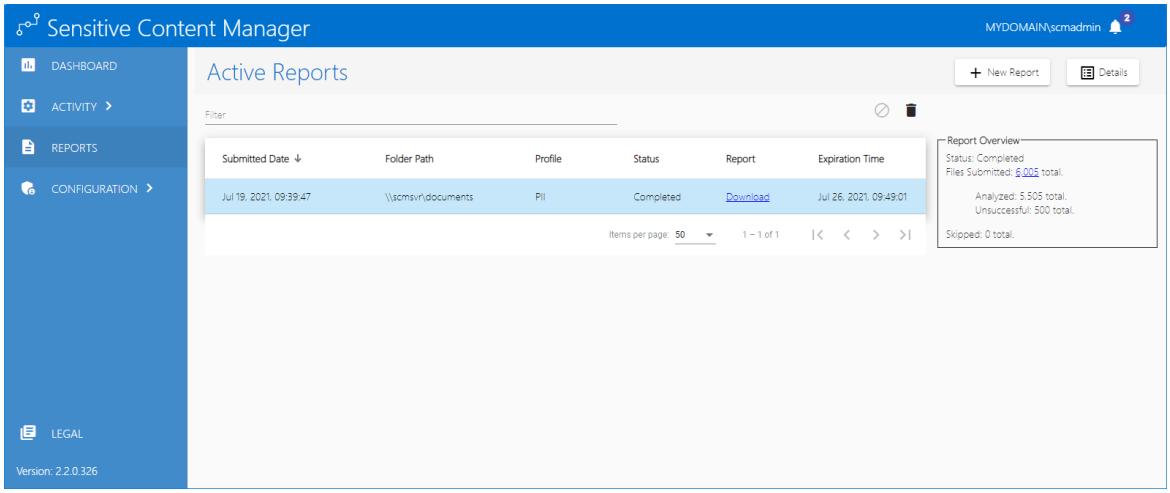
b. **Select the profile to use for this scan** - click the drop down to select from a list of standard or custom profiles that will be used for the scan. Then click **Next**.

c. **Specify options** - select a retention period which is the number of days that the report will be retained. Then click **Next**.

d. **Ready to scan** - click **Scan Now** to begin the scan.

NOTE: You can review or revise your settings by clicking the edit icon for any of the previous settings.

3. The *Active Reports* page that opens will display the status of the scan.



Steps to cancel a report

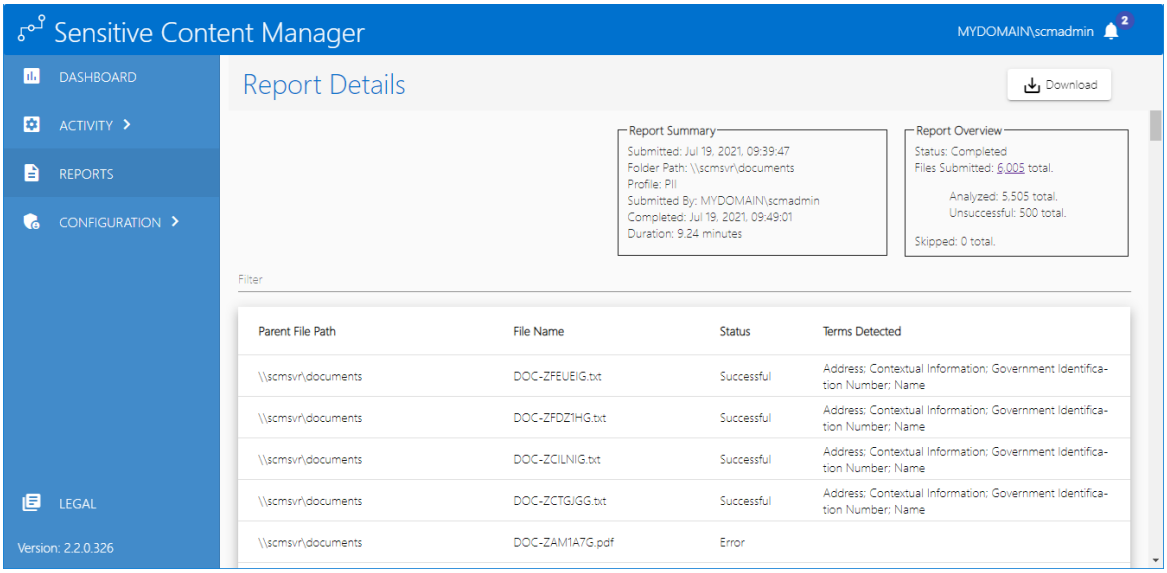
1. From the navigation panel on the left, click **REPORTS**. The *Active Reports* page opens.
2. Select a report where the status indicates *In Progress.* You cannot cancel a report with any other status.
3. Click **Cancel Scan** ⊘. The *Confirmation* dialog opens.
4. Click **Yes** to confirm or **No** to prevent the cancellation. If you click **Yes**, the status will briefly change to *Canceling* and then to *Canceled*.

Steps to delete a report

1. From the navigation panel on the left, click **REPORTS**. The *Active Reports* page opens.
2. Select a report where the status indicates *Canceled or Completed.* You cannot delete a report with any other status.
3. Click **Delete Scan** 🗑. The *Confirmation* dialog opens.
5. Click **Yes** to confirm or **No** to prevent the deletion. If you click **Yes**, the report will be deleted.

Steps to view report details

1. From the navigation panel on the left, click **REPORTS**. The *Active Reports* page opens.
2. Select a report and click **Details** to view the information about the scan. The *Report Details* page opens.



The information displayed on this page is described below:

Report Summary

a. **Submitted** - date and time when the scan was submitted.

b. **Folder Path** - the UNC location of the root folder that contains one or files or folders to be analyzed.

c. **Profile** - name of the profile used in the scan

d. **Submitted By** - identity of the user who submitted this report in the format `domain\username`

e. **Completed** - date and time when the scan was completed.

f. **Duration** - the time taken to complete the scan.

Report Overview

a. **Status** - indicates the state of the job. Valid values are *In Progress, Canceling, Canceled* and *Completed*.

b. **Files Submitted** - the number of files that could be analyzed and have been submitted for analysis by the system. When the **Status** indicates *In Progress*, this value will be incremented every time a file is submitted for analysis. When the **Status** indicates *Completed*, this value will indicate the total number of files that were submitted for analysis.

c. **Analyzed** - indicates the subset of the **Files Submitted** that were successfully analyzed. When the **Status** indicates *In Progress*, this value will be incremented every time a file is successfully analyzed. When the **Status** indicates *Completed*, this value will indicate the total number of files that were successfully analyzed.

d. **Unsuccessful** - indicates the subset of the **Files Submitted** that could not be analyzed. When the **Status** indicates *In Progress*, this value will be incremented every time a file could not be analyzed. When the **Status** indicates *Completed*, this value will indicate the total number of files that could not be analyzed.

e. **Skipped** - the number of files that could not be submitted and were not processed any further.

List of analyzed files

a. **Parent File Path** - the UNC path of the file that has been submitted for analysis.

b. **File Name** - name of the file that has been submitted for analysis.

c. **Status** - the result of the analysis. Valid values are *Successful* and *Unsuccessful*.

d. **Terms Detected** - a semi-colon delimited list of the terms detected.

Working with the Report Details page

Managing items per page

To customize the number of items displayed on the page, click the **Items per page** drop down below the list and choose the number of items you wish to display. If there are more report detail records than the list can display, you can use the navigation links below the list to browse through more search terms.

NOTE: A maximum of 10,000 detail records can be viewed across all pages. If the number of files in the scan exceed 10,000 you can download the full or filtered list as a CSV file and use Excel or a similar desktop tool to view the results.

Filtering scan results

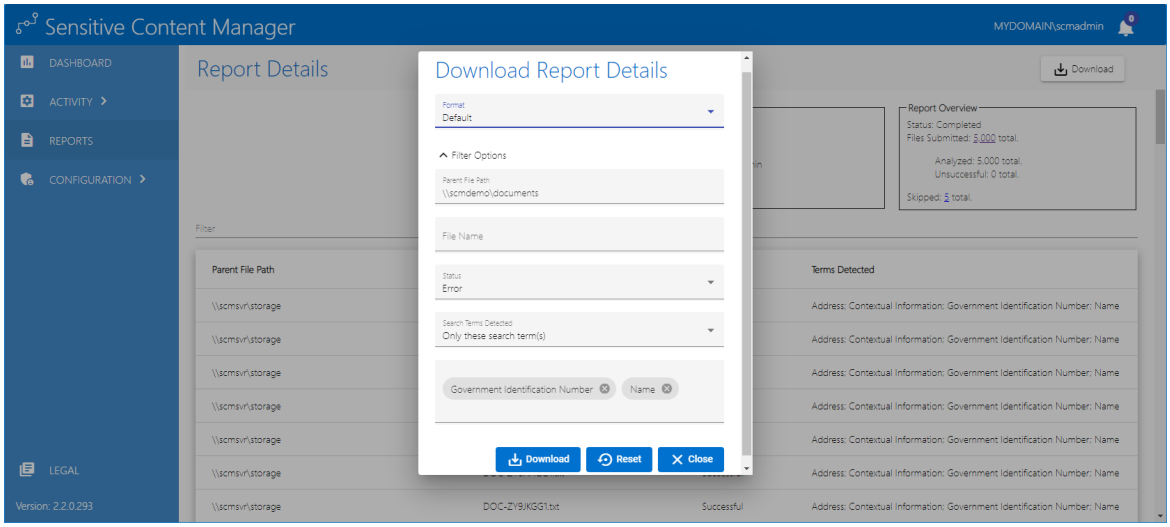
Enter a word in the **Filter** field above the list to filter the set of report detail records by the word entered.

Updating scan results

Click **Refresh** to retrieve and display the most recent set of file results from the SCM repository.

Downloading scan results

1. Click **Download**. The *Download Report Details* dialog opens.



2. Expand the *Filter* section to download a subset of the scan results if needed. Then enter the information as described below:

   a. **Format** - Choose an export format from the following option: **Default** or **Metalogix Essentials**

   b. **Parent Folder Path** - enter the folder path which contains the files to download. All sub-folders in the specified folder will be part of the filter criteria.

   c. **File Name** - enter a file name to download.

   d. **Status** - Choose from one of the following status values: **Any**, **Error**, **Successful** or **Warning**. For example, if you choose **Error** as the status, then the scan results where the status indicates an **Error** will be included in the filter criteria.

   e. **Search Term** - Select the search term from the drop down list that appears that you want to include in the filter. For example, if you enter **Government Identification Number** as the search term, then the scan results where the **Government Identification Number** was detected will be included in the filter criteria. You can also include a custom search term manually. For example, *Medical ID* could be custom search term. Custom search terms may be listed in the search terms list if they are part of a current profile. Custom search terms will not be listed if you removed the term from a profile and you must enter it manually.

3. Click **Download** to export the scan results to a CSV file with the specified export **Format**. Click **Reset** to clear the filter or **Close** to confirm and exit the dialog.

7

Configuration

This section describes the components and properties that control the functionality of SCM. The following topics are described in this section:

- Profiles
- Search Terms
- Settings

Profiles

A profile is a named collection of content search and analysis specifications. Each profile is made up of search terms and regular expressions that can detect sensitive content in English, German, Spanish, Italian, French and Portuguese. SCM ships with 4 default profiles:

- General Data Protection Regulation (GDPR)
- Personally Identifiable Information (PII)
- Protected Health Information (PHI)
- Payment Card Information (PCI)

The file search and analyAVION Medical Numbersis criteria requirements for your organization may differ from the system profiles that are available. For example, you may want to create a custom profile to group a different subset of the predefined search terms, add custom search terms for sensitive data types, or analyze data that falls outside common definitions of PII, PHI or financial data. Custom profiles created with the SCM profile wizard can be made available to both SCM and ControlPoint users.

With the standard or custom profiles, SCM allows you to analyze the following file types -

- Compressed files (ZIP, 7z, TAR, RAR etc.)
- Comma Separated Values (CSV)
- Log Files
- Microsoft Excel
- Microsoft Excel 2007
- Microsoft Outlook Express Mail Message
- Microsoft Outlook Message
- Microsoft PowerPoint Presentation

- Microsoft PowerPoint Presentation 2007
- Microsoft PowerPoint Show
- Microsoft PowerPoint Show 2007
- Microsoft Word Document
- Microsoft Word Document 2007
- Open Document Text
- Portable Document Format (PDF)
- Rich Text Format (RTF)
- Text Document

In this topic

[Steps to view profiles](#)

[Steps to create a new profile](#)

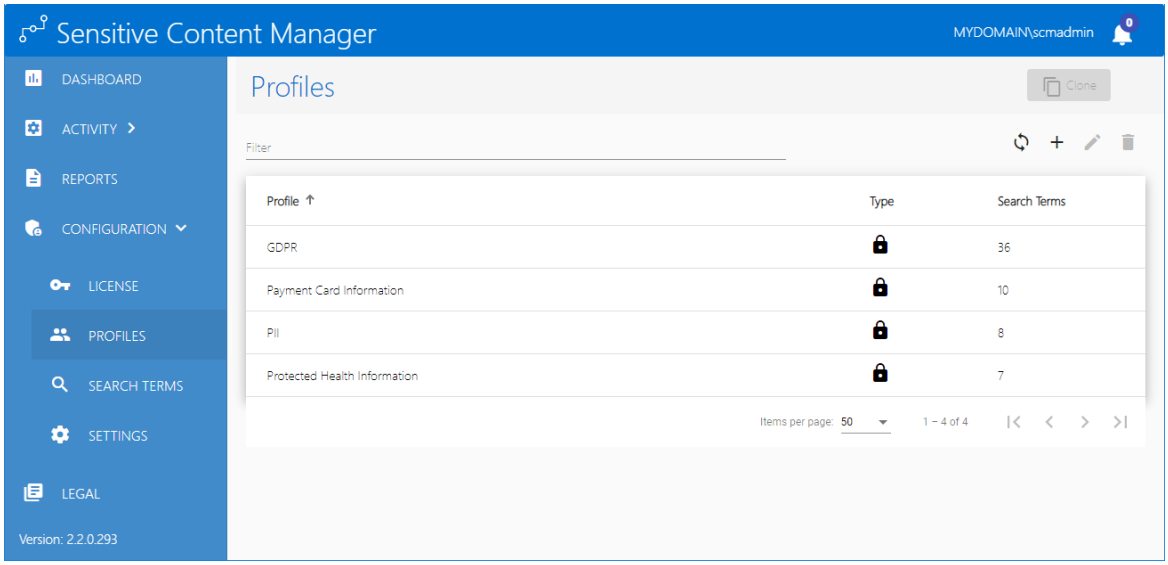
[Steps to edit a profile](#)

[Steps to delete a profile](#)

[Steps to customize a system profile](#)

Steps to view profiles

1. From the navigation panel, click **CONFIGURATION** and then click **PROFILES**. The *Profiles* page opens.



   The columns in the list are as follows:

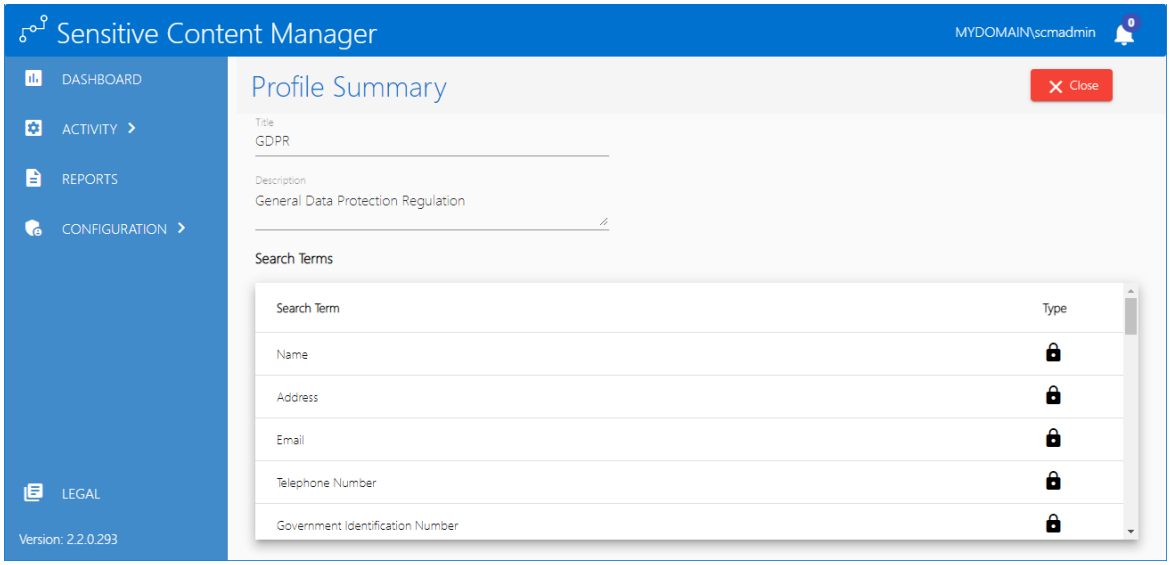
   a. **Profile** - a named set of search terms

b. **Type** - indicates whether the profile is a system profile or a custom profile. System profiles cannot be edited but can be cloned to create custom profiles.

c. **Search Term** - indicates the number of search terms in the profile.

- To customize the number of items displayed on the page, click the **Items per page** drop down below the list and choose the number of items you wish to display. If there are more profiles than the list can display, you can use the navigation links below the list to browse through more profiles.
- Enter a keyword in the **Filter** field above the list to filter the set of profiles by the keyword entered.
- Click **Refresh** to retrieve and display a fresh set of profiles from the SCM repository.

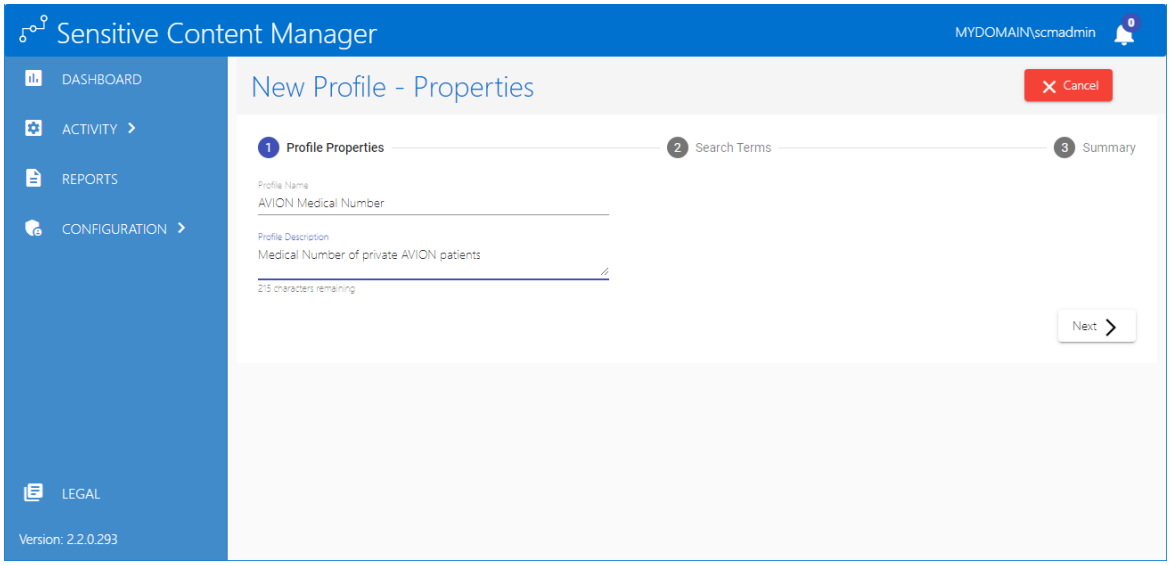
2. Click a profile link to view the profile details. The *Profile - Summary* page opens.



3. Click **Close** to return to the *Profiles* page.

Steps to create a new profile

1. From the navigation panel on the left, click **CONFIGURATION** and then click **PROFILES**. The *Profiles* page opens.
2. Click **Create** + to open the new profile wizard. The *New Profile - Properties* page opens.



Specify the property values as described below:

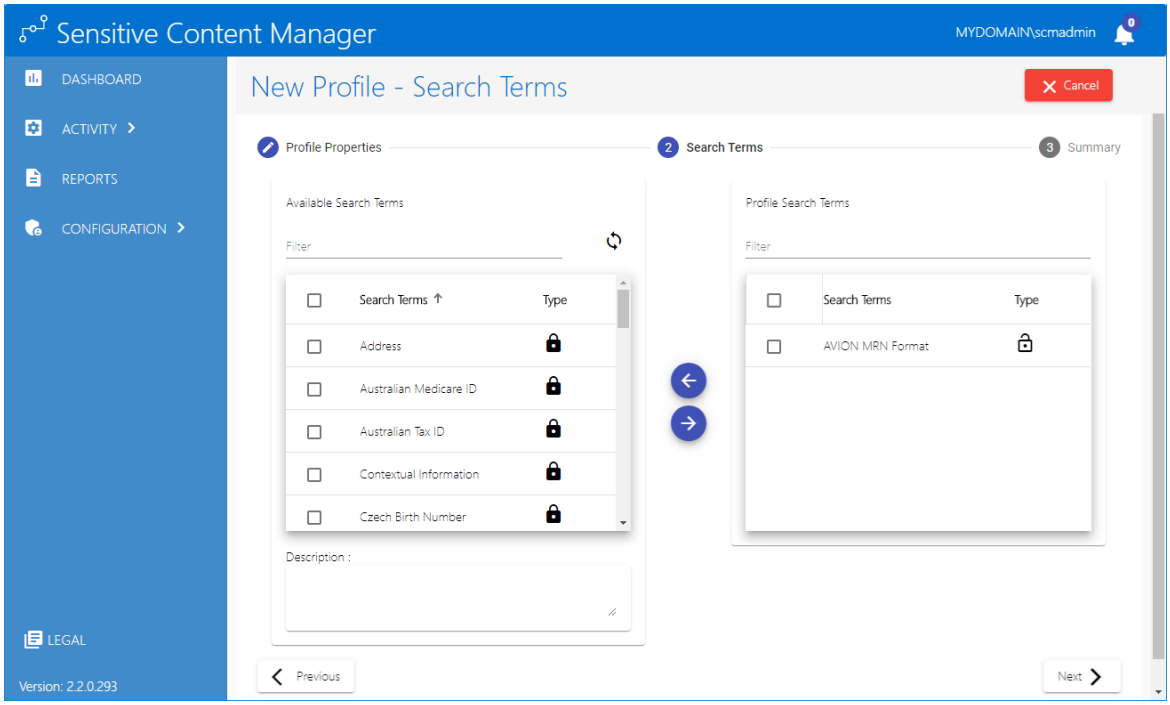
a. **Profile Name** - enter a unique profile name. The profile name cannot exceed 100 characters.

b. **Profile Description** - enter a description of the profile. The description text should not exceed 256 characters.

3. Click **Next**. The *New Profile - Search Terms* page opens.

4. From the *Available Search Terms* list, select one or more check boxes to choose the search terms for the profile. You can filter the list by entering a key word in the **Filter** field of the *Available Search Terms* list. If the key word exists in the name or the description of the search term, you will see the result set in the list. To include custom search terms in the list, see Search Terms.

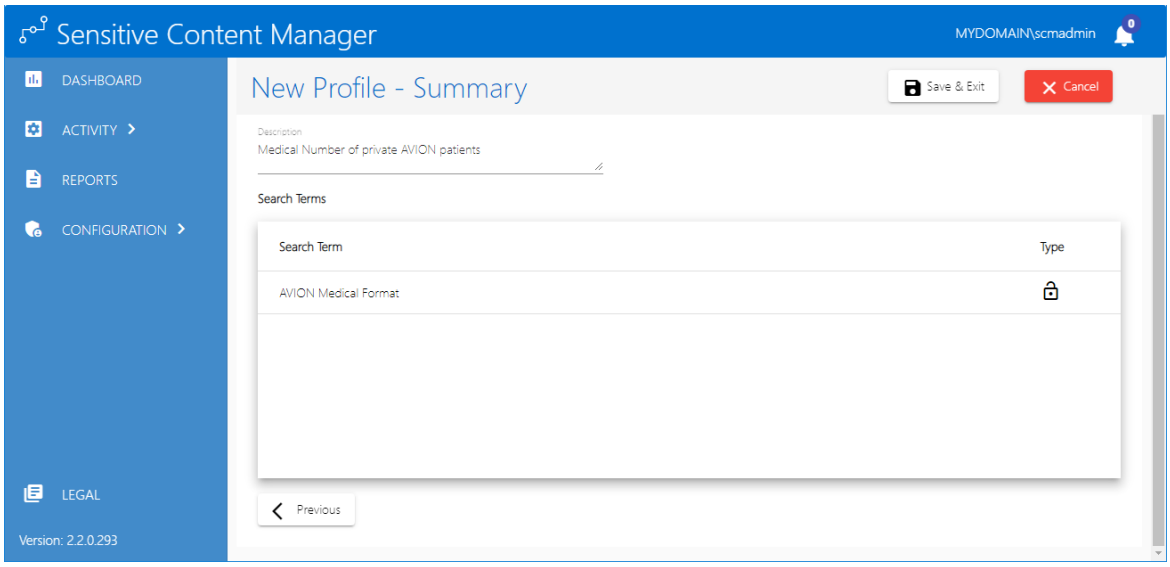
5. Click to move the selected search terms to the *Profile Search Terms* list.



6. To remove a search term from the *Profile Search Terms* list, select one or more check boxes in the *Profile Search Terms* list. You can filter the list by entering a key word in the **Filter** field of the *Profile Search Terms* list. If the key word exists in the name or the description of the search term, you will see the result set in the list.

7. Click to move the selected search terms back to the *Available Search Terms* list.

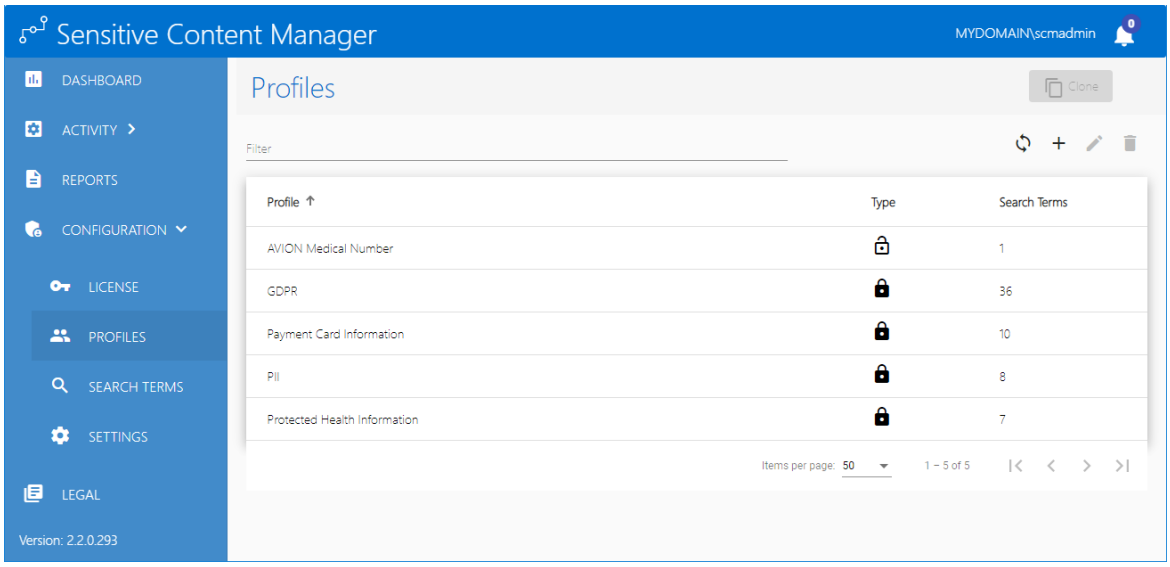
8. When you complete the selection of search terms as displayed in the *Profile Search Terms* list, click **Next**. The *New Profile - Summary* page opens.



9. Verify the new profile properties and search terms, and then click **Save & Exit**. You can click **Cancel** to exit the wizard or click **Previous** to revise the profile.

Steps to edit an existing profile

1. From the navigation panel on the left, click **CONFIGURATION** and then click **PROFILES**. The *Profiles* page opens.
2. Select a custom profile that you want to edit. You cannot edit a system profile.



3. Click **Edit** to open the profile editor. The *Edit Profile - Properties* page opens.
4. Review and revise the properties as needed.
5. Click **Next**. The *Edit Profile - Search Terms* page opens.
6. From the *Available Search Terms* list, select one or more check boxes to choose the search terms for the profile. You can filter the list by entering a key word in the **Filter** field of the *Available Search Terms* list. If the key word exists in the name or the description of the search term, you will see the result set in the list.
7. Click to move the selected search terms to the *Profile Search Terms* list.
8. To remove a search term from the *Profile Search Terms* list, select one or more check boxes in the *Profile Search Terms* list. You can filter the list by entering a key word in the **Filter** field of the *Profile Search Terms* list. If the key word exists in the name or the description of the search term, you will see the result set in the list.
9. Click to move the selected search terms back to the *Available Search Terms* list.
10. When you complete the revision of search terms as displayed in the *Profile Search Terms* list, click **Next**. The *Edit Profile - Summary* page opens.
11. Verify the revised profile properties and search terms, and then click **Save & Exit**. You can click **Cancel** to exit the wizard or click **Previous** to revise the profile.

CAUTION: If a profile is modified while files are being scanned with the same profile, the scan will continue. All remaining files that are scanned will use the revised profile.

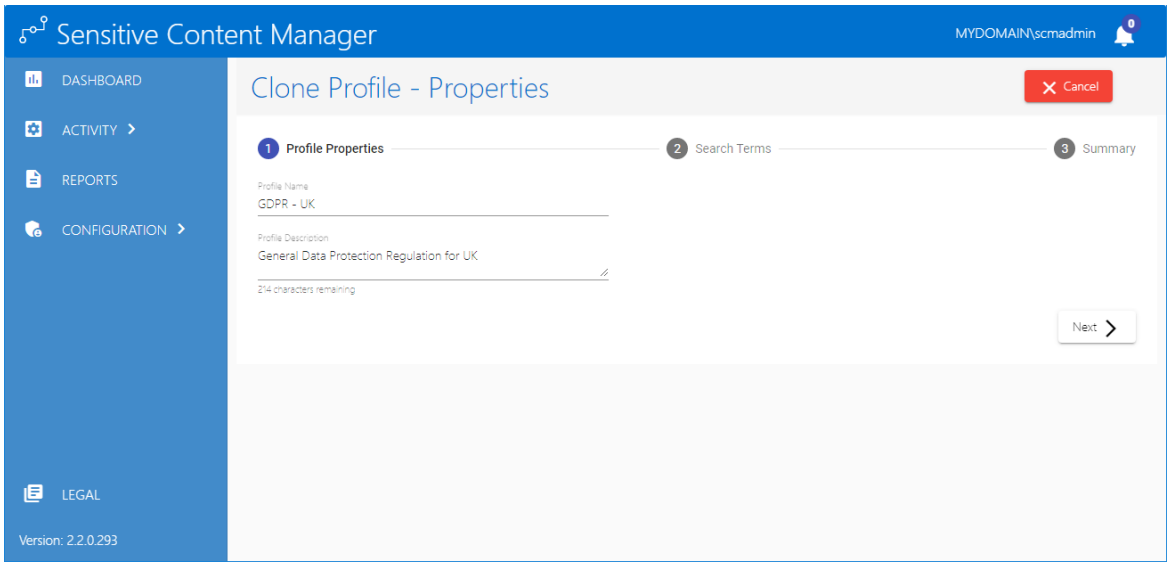
Steps to delete an existing profile

1. From the navigation panel on the left, click **CONFIGURATION** and then click **PROFILES**. The *Profiles* page opens.
2. Select a custom profile that you want to delete. You cannot delete a system profile.
3. Click **Delete** and then click **Yes** in the confirmation dialog to confirm the deletion.

> **CAUTION:** If a profile is modified while files are being scanned with the same profile, the scan will continue. All remaining files that are scanned after the profile is deleted, will produce a failed result and include no term matches.

Steps to customize a system profile

1. From the navigation panel on the left, click **CONFIGURATION** and then click **PROFILES**. The *Profiles* page opens.
2. Select a system profile.
3. Click **Clone** to open the new profile wizard. The *Clone Profile - Properties* page opens.

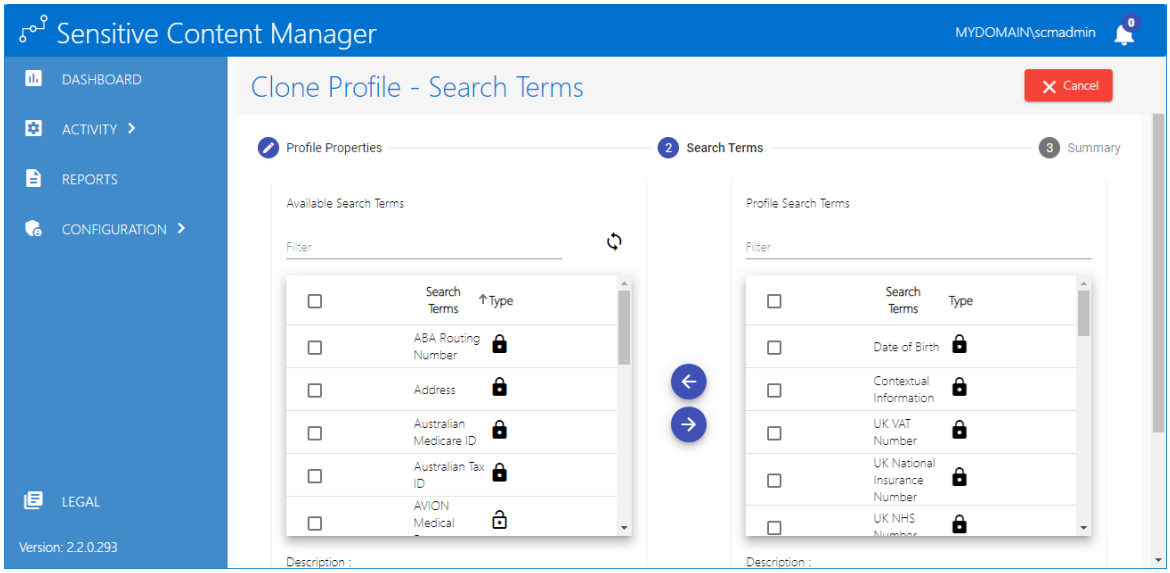


Change the property values as described below:

a. **Profile Name** - enter a unique profile name. The profile name cannot exceed 100 characters.

b. **Profile Description** - change the description of the profile. The description text should not exceed 256 characters.

4. Click **Next**. The *Clone Profile - Search Terms* page opens in edit mode with the same search terms as in the original profile.



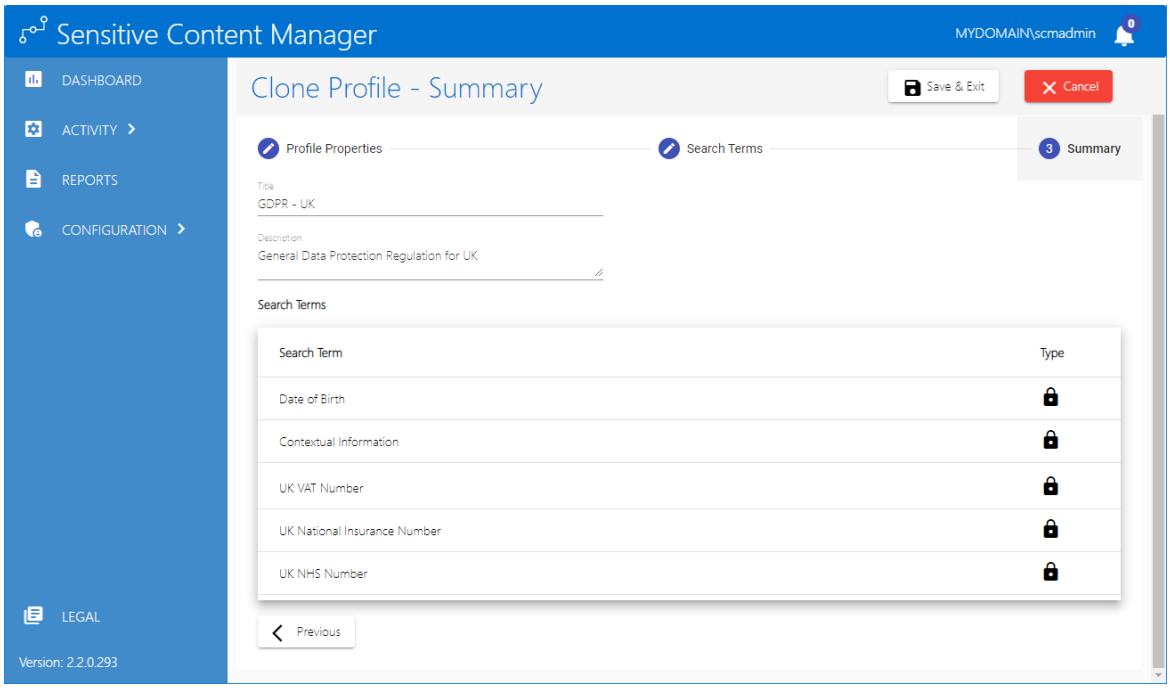
5. From the *Available Search Terms* list, select one or more check boxes to choose additional search terms for the custom profile. You can filter the list by entering a key word in the **Filter** field of the *Available Search Terms* list. if the key word exists in the name or the description of the search term, you will see the result set in the list.

6. Click to move the selected search terms to the *Profile Search Terms* list.

7. To remove a search term from the *Profile Search Terms* list, select one or more check boxes in the *Profile Search Terms* list. You can filter the list by entering a key word in the **Filter** field of the *Profile Search Terms* list. If the key word exists in the name or the description of the search term, you will see the result set in the list.

8. Click to move the selected search terms back to the *Available Search Terms* list.

9. When you complete the selection of search terms as displayed in the *Profile Search Terms* list, click **Next**. The *Clone Profile - Summary* page opens.



10. Verify the new profile properties and search terms, and then click **Save & Exit**. Click **Previous** to revise the profile. Click **Cancel** and then click **Yes** in the confirmation dialog to exit the wizard.

Search Terms

A search term is a named entity for a regular expression that is used in a profile to scan files for matching patterns.

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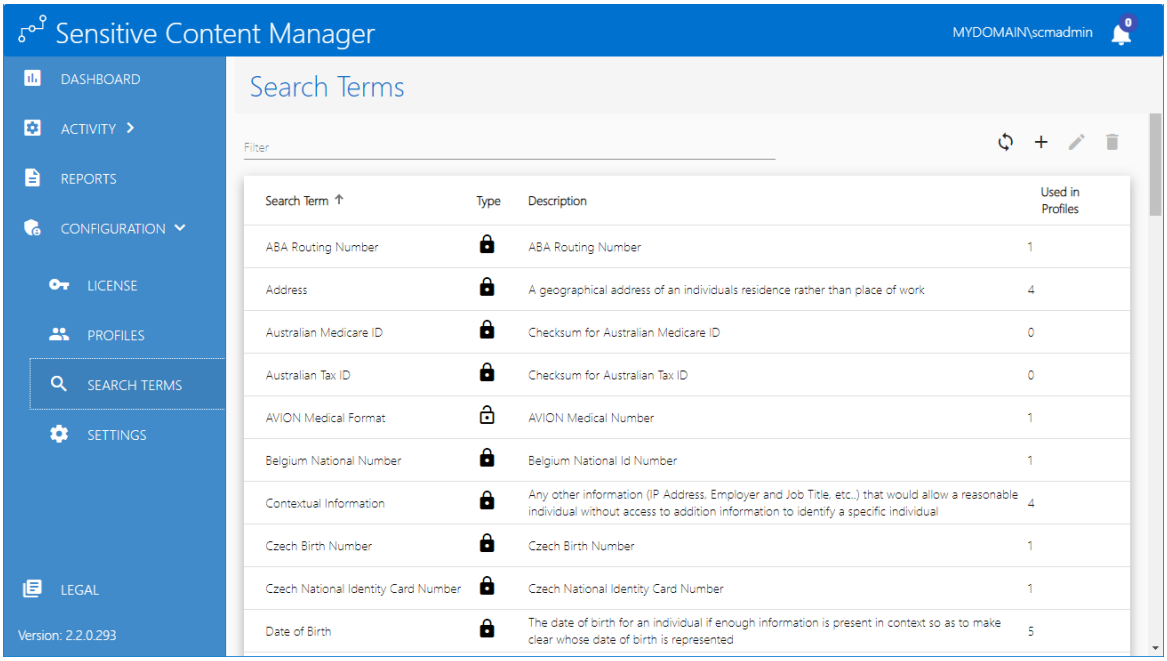
Steps to view search terms

1. From the navigation panel on the left, click **CONFIGURATION** and then click **SEARCH TERMS**. The *Search Terms* page opens.



The columns in the list are as follows:

a. **Search Term** - name of the search term

b. **Type** - indicates whether the search term is a standard search term or a custom search term . Standard search terms cannot be edited.

c. **Description** - explanation of the search term.

d. **Used in Profiles** - integer value that indicates the number of profiles that use the search term.

- The list can be customized to display more or less items on the page. Click the **Items per page** drop down below the list and choose the number of items you wish to display. If there are more search terms than the list can display, you can use the navigation links below the list to browse through more search terms.
- Enter a keyword in the **Filter** field above the list to filter the set of search terms by the keyword entered.
- Click **Refresh** to retrieve and display a fresh set of search terms from the SCM repository.

2. Click a search term to view its details.

Steps to create a new search term

1. From the navigation panel on the left, click **CONFIGURATION** and then click **SEARCH TERMS**. The *Search Terms* page opens.
2. Click **Create** + to open the *Custom Search Term* window.

   Specify the property values as described below:

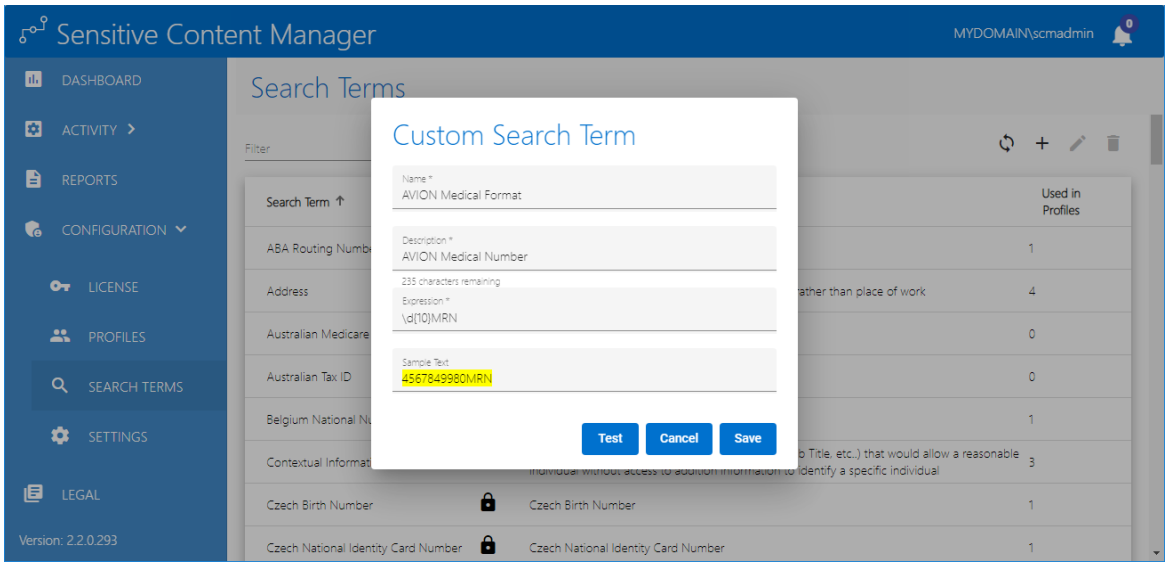
   a. **Name** - enter a unique search term name. The profile name cannot exceed 100 characters.

   b. **Description** - enter a description of the search term. The description text should not exceed 256 characters.

   c. **Expression** - enter a regular expression to match a text pattern in a file.

   d. **Sample Text** - enter any text that contains the pattern you want to match.

3. Click **Test**. If a pattern match occurs in the **Sample Text** field, the matching pattern will be highlighted.



4. Click **Save** to save the new search term. Verify that it is listed in the *Search Terms* list. You can click **Cancel** to exit the window.

Steps to edit an existing search term

1. From the navigation panel on the left, click **CONFIGURATION** and then click **SEARCH TERMS**. The *Search Terms* list page opens.
2. Select a custom search term that you want to edit. You cannot edit a standard search term.
3. Click **Edit** to open the *Custom Search Term* window.
4. Review and revise the properties as needed.
5. If you revise the regular expression it is recommended that you enter some appropriate text in the **Sample Text** field and click **Test** to verify the regular expression.
6. Click **Save** to save the new search term. You can click **Cancel** to exit the window.

> **CAUTION:** If a search term is modified while files are being scanned with a profile that contains the same search term, the scan will continue and all remaining files that are scanned will use the revised search term.

Steps to delete an existing search term

1. From the navigation panel on the left, click **CONFIGURATION** and then click **SEARCH TERMS**. The *Search Terms* list page opens.
2. Select a custom search term that you want to delete. You cannot delete a standard search term.
3. Click **Delete** and then click **Yes** in the confirmation dialog to confirm the deletion.

> **CAUTION:** If a search term is deleted while files are being scanned with a profile that contains the same search term, the scan will continue but none of the remaining files will be checked for patterns that match the deleted search term.

Settings

Log files that are generated by the application have different levels of severity. The *Settings* page lets you specify the logging level of system messages.

Steps to set the logging level

1. From the navigation panel on the left, click **CONFIGURATION** and then click **SETTINGS**. The *Settings* page opens.
2. From the **Logging Level** drop down, select one of the following log levels listed below by descending severity:

- **Verbose -** Logs that contain the most detailed messages. These messages may contain sensitive application data. These messages are deactivated by default and should never be activated in a production environment.
- **Debug** - Logs that are used for interactive investigation during development. These logs should primarily contain information useful for debugging and have no long-term value.
- **Information** - Logs that track the general flow of the application. These logs should have long-term value.
- **Warning** - Logs that highlight an abnormal or unexpected event in the application flow, but do not otherwise cause the application processes to stop.
- **Error** - Logs that highlight when the application processes stop due to a failure. These should indicate a failure in the current activity, not an application-wide failure.
- **Fatal** - Logs that describe an unrecoverable application or system crash, or a catastrophic failure that requires immediate attention.

NOTE: The level you choose will also include all levels below it. For example, if you choose **Verbose**, all the other log levels will also be tracked. If you choose **Warning**, then the only the log levels **Warning**, **Error** and **Fatal** will be tracked.
When a log level is changed, you must allow between two to five minutes for the new log level to be distributed to all the services. If scans are in progress, the new log level will be applied only when the services are able to register the new log level.

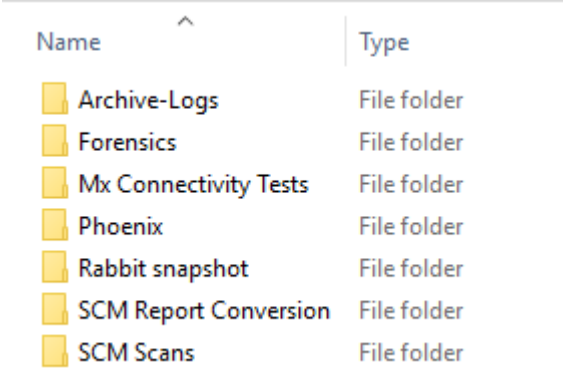
8

Support Tools

Support Tools are provided with the installation media.

To access the support tools:

1. Download the installation ZIP file and extract all the files on the machine on which you are planning to install the SCM components.
2. Open the Support Tools folder.



A summary of each tool is provided below. Each folder contains a *ReadMe.txt* file that provides detailed information about the tool.

Archive-Logs

A PowerShell script to create a copy of all the log files for SCM into a single .zip file.

Forensics

PowerShell scripts to visualize the time line of verbose SCM log entries for better troubleshooting.

Mx Connectivity Tests

PowerShell script and aspx page to troubleshoot the connectivity to SQL server.

Phoenix

Command-line program that helps you to process RabbitMQ dead-letter messages. Helps you to capture content to SQL, resubmit, or move messages to a new Queue.

Rabbit Snapshot

PowerShell script to import and export a RabbitMQ configuration from one machine to another.

SCM Report Conversion

PowerShell script to convert the exported scan report to an Essentials format for integration. In SCM 2.1.1 and later versions, report conversion is possible directly from the Administration Center.

SCM Scans

PowerShell scripts to submit a file share scan and download the resulting CSV report. The script requires a *Profile Id*. To get the *Profile Id* of a standard or custom profile:

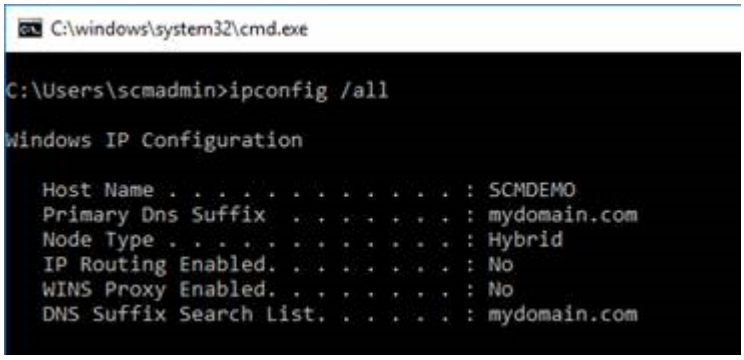
1. From the navigation panel in the Administration Center, click CONFIGURATION and then click PROFILES. The *Profiles* page opens.
2. Click a profile link. The *Profile - Summary* page opens.
3. Get the *Profile Id* from the URL. For example, for the Personally Identifiable Information (PII) profile, the *Profile Id* is 1 (`https://<domain:port>/#/profile/view/1`)

9

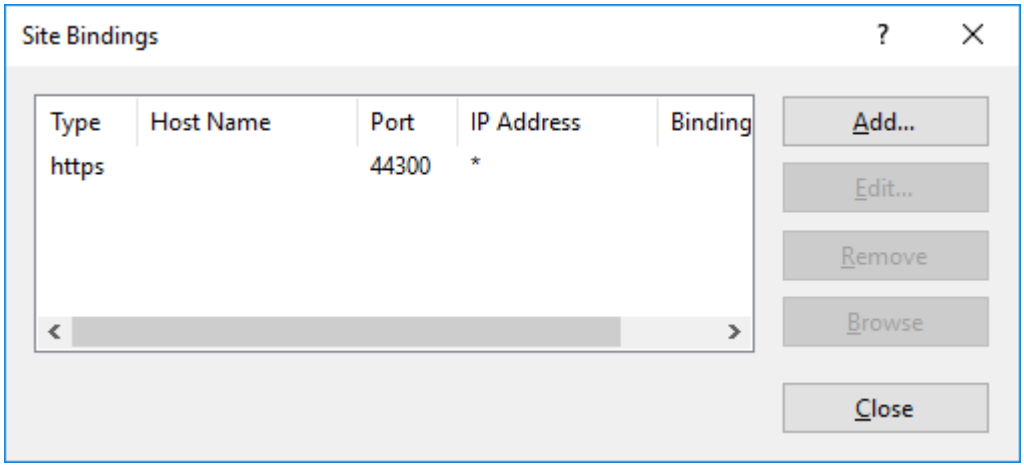
Appendix

Steps to get the URL for the SCM Administration Center

1. Log in to the SCM Server and open the **Command** console.
2. Run the command `ipconfig /all`



3. Get the FQDN of the server from the windows command prompt. This gives you **[Hostname]**. **[Primary Dns Suffix]**. For example, `SCMDEMO.mydomain.com`
4. Open **IIS Manager** to get the protocol and port.
   a. Expand the server node.
   b. Expand the **Sites** node and select **SCMAdminPortal**
   c. From the *Actions* pane click **Bindings**. This will give you [protocol] and [port]. For example, the protocol is **https** and the port binding is **44300**.



Gather all this information together to construct the URL **[protocol]**:// **[Hostname]**.**[Primary Dns Suffix]**:**[Port]**. For example, `https://SCMDEMO.mydomain.com:44300`

10

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

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Technical Support Resources

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The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal lets you:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product