

Netwrix Data Classification for Dropbox Quick-Start Guide

Version: 5.6.1
8/12/2021



Table of Contents

1. Introduction	4
2. Configure Dropbox for Crawling	5
3. Install Netwrix Data Classification	8
4. Initial Product Configuration	10
4.1. Select Processing Mode	11
4.2. Processing Settings	11
4.3. Add Taxonomy	12
4.4. Review Your Configuration	12
5. Add Database Source	13
5.1. Database Configuration Wizard	14
5.1.1. Introduction	14
5.1.2. Tables	15
5.1.3. Exceptions	15
5.1.4. Summary	16
6. Add Dropbox	17
7. Review Reports and Browse Classified Documents	19

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1. Introduction

This guide is intended for the first-time users of Netwrix Data Classification for Dropbox. It can be used for evaluation purposes, therefore, it is recommended to read it sequentially, and follow the instructions in the order they are provided. After reading this guide you will be able to:

- Prepare your IT infrastructure for scanning
- Install and configure Netwrix Data Classification
- Add a source to start crawling Dropbox
- Review classification results
- Leverage reporting capabilities and export results for custom reports

NOTE: This guide only covers the basic configuration and usage options for crawling Dropbox with Netwrix Data Classification. For advanced installation scenarios and configuration options, as well as for information on various reporting possibilities and other product features, refer to [Netwrix Data Classification Online Help Center](#).

2. Configure Dropbox for Crawling

Netwrix Data Classification connects to and crawls a Dropbox source via a custom Dropbox app, created within Dropbox management console.

You will need to create a Dropbox App and authorize it. Do the following:

1. Create a new App - see See [To create a new app](#) for more information.
2. Generate Access token - See [To authorize your app](#) for more information.

To create a new app

To create a new app, you should sign in to Dropbox cloud using a Dropbox Business account with administrative rights. Refer to [Dropbox documentation](#) for more information on the accounts and rights.



1. Navigate to <https://www.dropbox.com/developers/apps/create>
2. On the **Choose an API** step, select **Scoped Access**.
3. On the **Choose the type of access you need** step, select **Full Dropbox** type.
4. Provide a name for your App. For example, *Netwrix Data Classification*.

NOTE: Remember to agree with Dropbox API Terms and Conditions.

5. Click Create app.

Create a new app on the DBX Platform

1. Choose an API

<input type="radio"/> Dropbox API For apps that need to access files in Dropbox. Learn more		<input checked="" type="radio"/> Dropbox Business API For apps that need access to Dropbox Business team info. Learn more	
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2. Choose the type of access you need

[Learn more about Business access types](#)

<input type="radio"/> Team information – Information about the team and aggregate usage data.
<input type="radio"/> Team auditing – Team information, plus the team's detailed activity log.
<input checked="" type="radio"/> Team member file access – Team information and auditing, plus the ability to perform any action as any team member.
<input type="radio"/> Team member management – Team information, plus the ability to add, edit, and delete team members.

3. Name your app

To authorize your app

1. Once your App has been created, navigate to the **Permissions** tab.
2. Select the following permissions and click submit.
 - account_info.read
 - files.metadata.write
 - files.metadata.read
 - files.content.write
 - files.content.read
 - sharing.read
 - team_info.read
 - team_data.member
 - team_data.team_space

- files.team_metadata.write
 - members.read
3. Navigate to the **Settings** tab then scroll down to **OAuth2** option and set the members.read **Access token expiration** to *'No expiration'* then click **Generate** under **Generated access token**.

NOTE: If you change the app's permissions you will need to regenerate this token.

4. Copy the token to a clipboard. You will need it later when adding a Dropbox source in Netwrix Data Classification administrative web console.

Netwrix Data Classification

Settings Branding Analytics

Status Development Apply for production

Development teams 0 / 1 Enable additional teams Unlink all teams

Permission type Team member file access ⓘ

App key e14z47h81tgg15o

App secret Show

OAuth 2

Redirect URIs

Add

Allow implicit grant ⓘ

Generated access token ⓘ

Generate

Chooser / Saver / Embedder domains Add

If using the [Chooser](#), the [Saver](#), or the [Embedder](#) on a website, add the domain of that site.

Webhooks

Webhook URIs ⓘ

Add

Delete app Delete app

3. Install Netwrix Data Classification

1. Run `Netwrix_Data_Classification.exe`.
2. Review minimum system requirements and then read the License Agreement. Click **Next**.
3. Follow the instructions of the setup wizard. When prompted, accept the license agreement.
4. On the **Product Settings** step, specify path to install Netwrix Data Classification. For example, `C:\Program Files\NDC\`.
5. On the **Configuration** step, specify the directory where **Index files** reside. For example, `C:\Program Files\NDC\Index`.
6. On the **SQL Database** step, provide SQL Server database connection details.

Complete the following fields:

Option	Description
Server Name	Provide the name of the SQL Server instance that hosts your NDC SQL database. For example, " <code>WORKSTATIONSQ\SQLSERVER</code> ".
Authentication Method	Select Windows or SQL Server authentication method.
Username	Specify the account name.
Password	Provide your password.
Database Name	Enter the name of the SQL Server database. Netwrix recommends using NDC_database name.

7. On the **Licensing** step, add license. You can add license as follows:
 - Click the **Import** button and browse for your license file
OR
 - Open your license file with any text editor, e.g., **Notepad** and paste the license text to the **License** field.
8. On the **Administration Web Application** step, review default IIS configuration.
9. On the **Services** step, configure Netwrix Data Classification services:

- Select all services to be installed.
- **File System Path**—Use default path or provide a custom one to store Netwrix Data Classification's Services files. For example, *C:\Program Files\NDC Services*.
- Provide user name and password for the product services service account.

NOTE: This account is granted the **Logon as a service** privilege automatically on the computer where NDC is going to be installed.

- Select additional service options, if necessary.
10. On the **Pre-Installation Tasks and Checks** step, review your configuration and select **Install**.
 11. When the installation completes, open a web browser and navigate to the following URL: *http://localhost/conceptQS* where **localhost** is the name or IP address of the computer where Netwrix Data Classification is installed. For example, *http://workstationndc/conceptQS*.

4. Initial Product Configuration

The **Product Configuration Wizard** allows you quickly configure basic Netwrix Data Classification settings such as processing mode, taxonomies, etc.

In your web browser, navigate to the following URL: `http://hostname/conceptQS` where **hostname** is the name or IP address of the computer where Netwrix Data Classification is installed and perform initial configuration steps.

On the **Instance** step, provide the unique name for your Netwrix Data Classification instance. For example, *"Production"*.

Product Configuration Wizard

Instance > Processing Settings > Taxonomies > Security > Summary

Instance: Set the instance name
Processing Settings: Configure how content is processed and classified
Taxonomies: Optionally add pre-defined taxonomies
Security: Restrict product access
Summary: Confirm and save product configuration

What should this instance be called?
Choose a unique name for this instance. For example: 'Production', 'Development', or 'UAT'.

Send anonymous usage statistics?
When enabled Netwrix Data Classification will upload a small amount of information on the way the product is being used to better improve our offering in the future. Personal/company information/data will not be sent.

Send Don't Send

Click **Next** to proceed. See also:

- [Select Processing Mode](#)
- [Processing Settings](#)
- [Add Taxonomy](#)
- [Security](#)
- [Configure Health Alerting](#)
- [Review Your Configuration](#)

4.1. Select Processing Mode

At this step of the wizard, select processing (indexing) mode for your environment.

Product Configuration Wizard

The screenshot shows the 'Processing Settings' step of the Product Configuration Wizard. The navigation bar includes: Instance (Set the instance name), Processing Settings (Configure how content is processed and classified), Taxonomies (Optionally add pre-defined taxonomies), Security (Restrict product access), and Summary (Confirm and save product configuration). The 'Processing Settings' step is highlighted with a red underline. Below the navigation bar are three selectable options:

- No Index**: A full classification experience with the core search capabilities disabled. (Icon: Tag)
- Keyword**: A full classification experience with a simple keyword based search. (Icon: Magnifying glass)
- Compound Term**: Compound term enriched Search and Classification experience. (Icon: Magnifying glass with plus sign)

For starter and evaluation purposes, select **Keyword** mode.

4.2. Processing Settings

On the **Processing Settings** step, review options for data processing and classification. For test and evaluation purposes, Netwrix recommends use default values.

Product Configuration Wizard

The screenshot shows the 'Processing Settings' step of the Product Configuration Wizard, specifically the 'Text Extraction' section. The navigation bar is the same as in the previous screenshot. The 'Text Extraction' section contains the following settings:

- Should OCR be used on image files?**

OCR is used to extract text from images. This is useful if the content being collected contains a large number of scanned documents (for example, image file extensions will be automatically added to the list of "Files Included" if this setting is enabled).

Yes No

Information
OCR requires the Visual C++ Redistributable for Visual Studio 2015, which is available from the following [link](#).
- Should images embedded in documents be processed?**

Images inside office documents (e.g. .DOC and .XLS files) or PDF files can be processed using OCR. Any text extracted will be appended to the document text. Note that this option can dramatically affect the processing speed of content.

Yes No
- Should the collection process optimise text storage by re-using text offsets?**

This reduces the storage requirements for the local database (stored text) by sharing and reusing the stored text when matches are identified. However, this does result in a small increase in sql database demands.

Yes No

The 'Classification Configuration' section contains the following settings:

- Should default clues be automatically created?**

When enabled a clue will automatically be created when a taxonomy is registered from SharePoint or a term is created. The new clue will either be a standard clue matching the term name or a metadata clue depending on the configuration specified at the taxonomy level settings.

Yes No
- Should boosted phrasematch scoring be enabled?**

When switched on, the score of any phrasematch clues will be boosted if the phrase appears multiple times in the document.

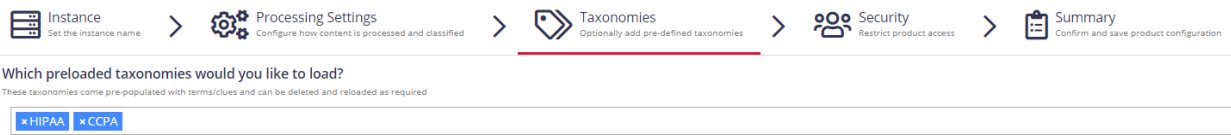
Yes No
- Should boosted regex scoring be enabled?**

Proceed with adding taxonomies.

4.3. Add Taxonomy

On this step, you are prompted to load predefined taxonomies.

Product Configuration Wizard



The screenshot shows the 'Product Configuration Wizard' with five steps: Instance, Processing Settings, Taxonomies, Security, and Summary. The 'Taxonomies' step is currently active and highlighted with a red underline. Below the steps, the question 'Which preloaded taxonomies would you like to load?' is displayed, followed by a search bar containing 'HIPAA' and 'CCPA'. A small note below the search bar states: 'These taxonomies come pre-populated with terms/clues and can be deleted and reloaded as required.'

Click the search bar and select one or several taxonomies you want to add. See [Built-in Taxonomies Overview](#) for the full list of built-in taxonomies supported by Netwrix Data Classification.

4.4. Review Your Configuration

On this step, review your configuration. Once you complete the wizard, you can:

- Add a Source
- Add a Taxonomy
- Take the Product Tour
- Get Help

5. Add Database Source


The **Database** source configuration screen allows you to enable the crawling and classification of content stored in your Microsoft SQL Server, MySQL, and Oracle databases.

Content must either be configured / crawled using the configured service accounts (IIS Application Pool User, Windows Services) or by using specific connection details.


Once connected it is possible to create an intelligent content mapping, crawling certain fields as unstructured index text, and other fields as mapped metadata. For more information please see the [Database Configuration Wizard](#) section.

If you wish to make other configuration changes before collection of the source occurs ensure you tick the checkbox "*Pause source on creation*".

➔ Add

 What do you want to crawl?
Select a source type to crawl

>

 Source Configuration
Define how this source should be crawled

Connection Type: MS SQL MySQL Oracle PostgreSQL

Server: **Database Name:**

Authentication Method: Integrated Sql

OCR Processing Mode: ⓘ Default (Disabled)

Source Group: SQL sources

Pause source on creation:

Complete the following fields:

Option	Description
Connection Type	Select your connection type: MS SQL, MySQL, or Oracle.
Server	Specify the server name of the database system to be crawled ("." can be used to indicate the local server).
Database Name	Specify the database that will be crawled. It is possible to configure multiple databases from the same server.
Authentication Method	Select authentication method: Integrated or SQL . <ul style="list-style-type: none"> • With Integration option selected, database will be accessed under the account currently logged on. • With SQL option selected, specify user name and password to be used when accessing the database.
OCR Processing Mode	Select processing mode for images in the documents:

Option	Description
	<ul style="list-style-type: none"> • Disabled – documents' images will not be processed. • Default – defaults to the source settings if configuring a path or the global setting if configured on a source. • Normal – images are processed with normal quality settings. • Enhanced – upscale images further to allow more accurate results. This will provide better accuracy but can lead to longer processing time if the images do not contain text.
Source Group	If you want to add database to a source group, select existing, or create a new one.
Pause source on creation	Select to make other configuration changes before the initial data collection starts.

After the source configuration is completed, you will be prompted to launch SQL crawling configuration wizard. See [Database Configuration Wizard](#) for more information.

5.1. Database Configuration Wizard

For the database sources, you can enable security-based crawling, that is, finding sensitive data (which logically will either be stored in text or binary-based columns). It is possible to create an intelligent content mapping, crawling certain fields as unstructured index text, and other fields — as mapped metadata.

This section explains how to use the **Database Configuration Wizard** for configuring the crawling process. You can run this wizard when adding the data source, or you can later open the **Source** tab, select your database source and click **Launch Wizard**.

IMPORTANT! If you want to crawl a target database in your MS SQL replication model, you must backup your database before running the configuration wizard.

See next:

- [Introduction](#)
- [Tables](#)
- [Exceptions](#)
- [Summary](#)

5.1.1. Introduction

On this step, provide matching rules to search in the database for data that match exactly or are similar to a specific pattern. You can indicate both: exact or partial matches over the database strings.

5.1.2. Tables

On this step, review the grid of the tables in the database that are not currently enabled for crawling (if already enabled then don't show in this grid) and have at least one text/binary column. Configure your crawling scope considering the following:

Column	Description
Table	Contains the list of all tables in the database, followed by alphabetically.
Text Columns	Contains the number of text/binary columns for each table. Click the number link to review the full list.
Metadata Columns	Contains the number of non-text/binary columns for each table. Click the number link to review the full list.
Primary Key	Contains the primary key for each table. Review the following Microsoft article for more information on SQL Server primary keys: Primary Keys Constraints .
Modified Filter	To improve performance the product performs automatic re-indexing against a field in each table that indicates the last modified date of the row. Where possible, the product will automatically map this based upon the exact match or inclusion of one of the below values within the field name. Additional values can be added below in order to support other naming conventions for modified fields (different language or internal convention).
Include?	Select if you want to disable crawling for this table. NOTE: You can disable crawling for all listed tables using the Include none option in the upper right corner of the wizard or enable crawling accordingly with the Include all .
View Sample	Shows a table of the top 15 rows allowing to view if the table is one to exclude.

5.1.3. Exceptions

On this step, review tables with missing primary keys and/or missing modified filters.

- **Missing primary keys** – only shows if users have tables that are missing primary keys where the user can select the primary key from a dropdown of all the columns. This step does not show if there are no missing primary keys.
- **Missing modified filters** – only shows if there are tables missing modified filters. Here tables are shown that are missing a modified and that have a datetime (or equivalent) typed column to select. If there are none this stage is skipped.

5.1.4. Summary

At this step, review your database configuration.

- **Overview** – review a high-level overview of the number of configured tables and excluded tables with their details.
- **Configured Tables** – double-check the configuration of tables to be crawled.
- **Excluded Tables** – review the full list of the tables to be excluded from classification scope with exclusion reason.


When the database configuration has been completed you will be redirected to the **Advanced Source Configuration**, this allows you to define how the database will be crawled. It is possible to crawl either specific tables, or crawl custom queries (defined select statements, which may use JOIN statements across multiple tables). See [Database](#) for more information.

6. Add Dropbox

The **Dropbox** source configuration screen allows you to enable the crawling and classification of content stored in Dropbox cloud storage.


IMPORTANT! Make sure you created App for Dropbox crawling before start adding the source. See the [Installation and Configuration Guide](#) for more information.

➔ Add



What do you want to crawl?
Select a source type to crawl

>



Source Configuration
Define how this source should be crawled

Access Token:

Access Shared Team Folders as:

OCR Processing Mode: ⓘ

Source Group:

Pause source on creation:

Complete the following fields:

Option	Description
Access Token	Provide the token you generated when authorizing your App. See To authorize your app for more information.
Access Shared Team Folder as:	<p>If you have team folders in your Dropbox namespace and you want to crawl one or more of these folders with Netwrix Data Classification, provide the email address of an account that has access to the desired team folders.</p> <p>For personal folders, this option is not required.</p> <p>For more information, refer to Dropbox Namespace guide.</p>
OCR Processing mode	(missing or bad snippet)
Source Group	Netwrix recommends creating a dedicated source group for Dropbox.

Option	Description
Pause source on creation	Select if you want to make other configuration changes before collection of the source occurs.


7. Review Reports and Browse Classified Documents

Once your documents are classified, you can identify sensitive information and reduce its exposure. Netwrix recommends starting with the **Document Tagging** report to see automatic and manual classifications of the documents within the reporting set. Further, you can browse your documents to see a list of documents achieving the minimum score set for classification in the term. Review the following for additional information:

- [To browse classification results](#)
- [To review the Document Tagging report](#)


To browse classification results

1. In administrative web console, navigate to **Taxonomies** → **Term Management**.
2. Select **Taxonomy** in the dropdown on the left and then expand specific term you are interested in.
3. Switch to **Browse** tab:






Small (10-100kb)  Source Filter: (None)


Clues Search **Browse** Working Set Related Graph Settings Logs

Find:






Filter by URL: Show  movements?

Add custom filter SEARCH

  SUGGEST CLUES  ADD TO WORKING SET  ADD TO NEGATIVE WORKING SET  RE-INDEX

 RE-CLASSIFY

Showing 2 of 2 record(s) Suggest clues for Search

1 **TestTW** (100%)     

4. Click **Filter** to start browsing your documents.

To review the Document Tagging report

1. In administrative web console, navigate to **Reports** and expand the **Document Reports** set.
2. Select the **Document Tagging** report and click **Show filters** to narrow report scope.

Filter	Description
Taxonomy	By default, the report shows results for all taxonomies. Select the taxonomy you are interested in to restrict report scope.
Score Range	Select the score. Review Scoring for more information.
Classification	By default, the report shows results for all terms within a taxonomy. Limit your results by selected term.
Page URL	Filter your results by selected page URL.
Source	Select source group you created for Google Drive.

3. Click **Generate** and review results.
4. You can also export displayed page to .csv and .xlsx table or download the whole results.

TIP: Upon export, you will be prompted to include any associated document metadata to the report. It can be useful if you want to generate custom security reports. Specify metadata fields and click **Export** to download report.