Remote IDM indexing of SharePoint documents using WebDAV

This chapter includes the following topics:

- About remote IDM indexing of SharePoint documents using WebDAV
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- Troubleshooting

About remote IDM indexing of SharePoint documents using WebDAV

With Symantec Data Loss Prevention version 11.1, you can index documents stored on a remote SharePoint server using WebDAV.

WebDAV (Web-based Distributed Authoring and Versioning) is a standard that provides extensions to the HTTP 1.1 protocol, allowing users to collaboratively edit and manage files on remote Web servers. Microsoft IIS deployments that host SharePoint instances can be enabled to accept WebDAV connections from Web clients.

Once you have enabled WebDAV for SharePoint, you can use the "Remote SMB Share" option available during IDM index configuration to index the remote documents. Symantec Data Loss Prevention supports remote IDM indexing using WebDAV for SharePoint 2007 and SharePoint 2010 instances.

Indexing remote SharePoint documents using WebDAV

Complete the following tasks to implement remote indexing of SharePoint documents using WebDAV.

Table 1-1   Indexing remote documents on SharePoint using WebDAV

Step	Task	Description
1	Enable WebDAV for SharePoint.	See "Enabling WebDAV for IIS" on page 3.
2	Start the WebClient service.	From the computer where the Enforce Server is installed, start the **WebClient** service using the "Services" console. If this service is "disabled," right-click it and select **Properties**. **Enable** the service, set it to **Manual**, then **Start** it. **Note:** You must have administrative privileges to enable this service.
3	Access the SharePoint instance.	From the computer where your Enforce Server is installed, access SharePoint using your browser and the following address format: `http://<server_name>:port`. For example, `http://protect-x64:80`.
4	Log on to SharePoint as an authorized user.	You do not need to have SharePoint administrative privileges.
5	Locate the documents to scan.	In SharePoint, navigate to the documents you want to scan. Often SharePoint documents are stored at the **Home > Shared Documents** screen. Your documents may be stored in a different location.
6	Find the UNC path for the documents.	In SharePoint for the documents you want to scan, select the option **Library > Open with Explorer**. Windows Explorer should open a window and display the documents. Look in the **Address** field for the path to the documents. This address is the UNC path you need to scan the documents remotely. For example: `\\protect-x64\Shared Documents`. Copy this path to the Clipboard or a text file.

Table 1-1   Indexing remote documents on SharePoint using WebDAV
(continued)

Step	Task	Description
7	Create the IDM Index.	To configure the remote indexing source: ■ For the **Document Source** field, select the **Use Remote SMB Share** option. ■ For the **UNC Path**, paste (or enter) the address you copied from the previous step. For example: `\\protect-x64\Shared Documents`. ■ For the **User Credentials**, enter your SharePoint user name and password, or select the same from the **Saved Credentials** drop-down list. ■ Select the option **Submit Indexing on Save** and click **Save**. **Note:** To create the IDM index, refer to the topic in the online Help or the *Symantec Data Loss Prevention Administration Guide* titled "Creating and modifying Indexed Document Profiles."
8	Verify success.	At the **Manage > Data Profiles > Indexed Documents** screen you should see that the index was successfully created. Check the "Status" and the number of documents indexed. If the index was successfully created you can now use it to create IDM policies. See "Troubleshooting" on page 4.

Enabling WebDAV for IIS

There are various methods for enabling WebDAV. The following steps provide one approach, in this case for a Windows Server 2008. This approach is provided as an example only. Your approach and environment may differ.

Enable WebDAV for SharePoint

1 Log on to the SharePoint system where you want to enable WebDAV.

2 Open the Internet Information Services (IIS) Manager console.

3 Select the server name in the IIS tree.

4 Expand the tree, click the **Web Sites** folder and expand it.

5 Select the SharePoint instance from the list.

6 Right-click the SharePoint instance and select **New > Virtual Directory**.

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7   The Virtual Directory Creation Wizard will appear. Click **Next**.

8   Enter a name in the **Alias** field (such as "WebDAV") and click **Next**.

9   Enter a directory path in the **Web Site Content Directory** field. It can be any directory path as long as it exists. Click **Next**.

10 Select **Read access** and click **Next**.

11 Click **Finish**.

12 Right-click the virtual directory that you created and select **Properties**.

13 In the **Virtual Directory** tab, select the option "A redirection to a URL" and click **Create**. The alias name is populated in the **Application Name** field.

14 Enter the SharePoint site URL in the "Redirect to" field and click **OK**. WebDAV is now enabled for this SharePoint instance.

See "Indexing remote SharePoint documents using WebDAV" on page 2.

Troubleshooting

If you cannot connect the Enforce Server computer to the SharePoint Server computer after enabling WebDAV, make sure that you have started the WebClient service on the Enforce Server computer. You must start this service and test the WebDAV connection before you configure IDM indexing.

If you plan to re-index SharePoint documents periodically as they are updated, it may be useful to map the remote network resource to the local computer where the Enforce Server is installed. You can use the "net use" MS-DOS command to map SharePoint using the UNC path. For example:

■   `net use`
    This command without parameters retrieves and displays a list of network connections.

■   `net use s: \\sharepoint_server\Shared Documents`
    This command assigns (maps) the SharePoint server to the local "S" drive.

■   `net use * \\sharepoint_server\Shared Documents`
    This command assigns (maps) the SharePoint server to the next available letter drive.

■   `net use s: /delete`
    This command removes the network mapping to the specified drive.

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