



# BeyondTrust

## **BeyondInsight 24.1 User Guide**

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# BeyondInsight User Guide

BeyondInsight is a central management, policy, reporting, and analytics console for many products within the BeyondInsight portfolio. BeyondInsight enables IT and security professionals to collaboratively reduce user-based risks, mitigate threats to information assets, address security exposures across large, diverse IT environments, and comply with internal, industry, and government mandates.

This guide provides instructions and procedures for using BeyondInsight.

## Components

### Discovery Scanner

The Discovery Scanner is the scan engine responsible for scanning the assets in your environment. The Discovery Scanner agent receives instructions from the Central Policy service.

A security certificate is required by the Events Client to communicate with the agent. This certificate is created during the BeyondInsight installation.

### Manager Service

This component is the BeyondInsight web interface.

The Manager Service also acts as a background service that gathers information from the Events Client, which retrieves information from the agents. The events are then encrypted and sent to the database.

### Application Bus (AppBus)

The AppBus provides communications between BeyondTrust components and receives events to insert in the BeyondInsight database. This function can also be performed by a dedicated Event Server for scalability.

### Events Client

The Events Client is responsible for forwarding information gathered by the Discovery Scanner agent.

The Events Client sends the information to the Manager Service. The Events Client is installed when a Discovery Scanner agent is installed.

### Events Client Certificate

Generate security certificates to ensure secure transmission of data between clients and BeyondInsight. Use the BeyondInsight Configuration Tool to export certificates.

 For more information, please see the [BeyondInsight Installation Guide](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/install/configuration-tool.htm) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/install/configuration-tool.htm>.

## Central Policy Server

Central Policy is a service that sends Discovery Scanner agents their settings. Central Policy is the component responsible for sending the agents job information.

For example, the Discovery Scanner agent needs to know the scan targets. This information is selected in the BeyondInsight management console. When the scan starts, the Central Policy sends the job information to the agent.

## Scheduling Service

Responsible for contacting the update server and downloading the latest product updates.

# Log In to the BeyondInsight Console

The admin credentials used to log in to the BeyondInsight console for the first time are configured during the installation process. Afterward, the credentials you use to log in to the console depend on the type of authentication configured for your BeyondInsight system. Logging into the console varies depending on the type of authentication configured for your system.

The following authentication types can be used:

- **BeyondInsight:** Create local users in BeyondInsight and add them to groups to assign permissions to features. Local users can log in to the console from the BeyondInsight login page.
- **Active Directory:** Add Active Directory users in BeyondInsight and add them to groups to assign permissions to features. Active Directory users can log in to the console from the BeyondInsight login page.
- **Microsoft Entra ID:** Add Entra ID users in BeyondInsight and add them to groups to assign permissions to features. Entra ID users can log in to the console from the BeyondInsight login page.



**Note:** To use Entra ID credentials for logging into BeyondInsight, the accounts must use SAML authentication. For more information on configuring Entra ID SAML with BeyondInsight, please see [Configure Microsoft Entra ID SAML with BeyondInsight SAML](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/security-provider.htm#configure-entra-id) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/security-provider.htm#configure-entra-id>.

- **LDAP:** Add LDAP users and add them to groups to assign permissions to features. LDAP users can log in to the console from the BeyondInsight login page.
- **Two-Factor Authentication:** Configure two-factor authentication with a RADIUS server or time-based one-time password (TOTP) authenticator app, and assign it to users in BeyondInsight. Users are prompted for their two-factor login options after providing their credentials on the BeyondInsight login page.
- **Smart Card:** Configure BeyondInsight to allow authentication using a smart card PIN. Users can bypass the BeyondInsight login page and navigate to the smart card site access URL provided by the administrator to use smart card authentication.
- **SAML Authentication:** Configure SAML identity providers in BeyondInsight to use authentication for web tools that support SAML 2.0 standard, such as PingID, Okta, and ADFS. Users can authenticate with the default SAML identity provider configured in BeyondInsight by clicking the **Use SAML Authentication** link on the BeyondInsight login page. To log in using a SAML identity provider other than the default provider, users can navigate to the SAML site access URL provided by the administrator.
- **Claims-Aware:** Configure a claims-aware website to bypass the current BeyondInsight login page and authenticate against any configured Federated Service that uses SAML to issue claims.



**Note:** When working in the console, the times displayed match the web browser on the local computer unless stated otherwise.

To log in:

1. Open a browser and enter the URL for your BeyondInsight / Password Safe instance:  
**`https://<hostname>/WebConsole/index.html`**



**Note:** You might need to accept a pre-login message, if one has been configured on your system.

2. Enter your username and password. The default username is **Administrator**, and the password is the administrator password you set in the Configuration Wizard.
3. If applicable, select a domain or LDAP Server from the **Log in to** list.



**Tip:** The **Log in to list** is only displayed on the **Login** page when there are either AD or LDAP user groups created in the BeyondInsight console. The **Log in to list** is displayed by default, but may be disabled / enabled by an admin user by toggling the **Show list of domains/LDAP servers on login page** setting from **Configuration > System > Site Options** page.

4. Click **Log In**.
5. To log in using SAML Authentication, click the **Use SAML Authentication** link below the **Log In** button. You are redirected to the single sign-on access site for the default SAML identity provider configured by your administrator in BeyondInsight.



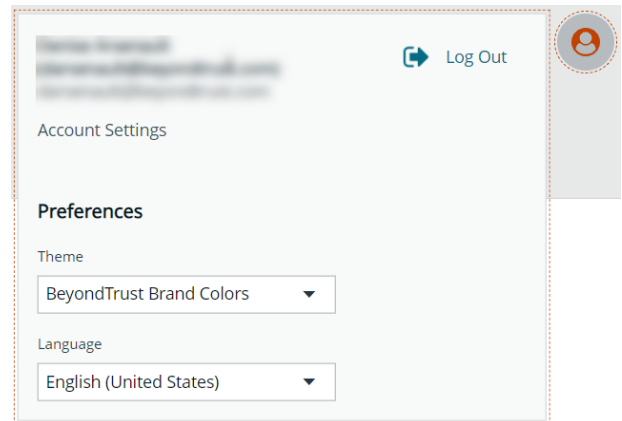
**Note:** If the initial login attempt fails, and two-factor authentication (2FA) is enabled, the user is taken to the 2FA page for security reasons.



For more information, please see the [BeyondInsight and Password Safe Authentication Guide](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/index.htm) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/index.htm>.

## Log Out of the Console

To log out of the console, click **Profile and preferences** in the top-right corner, and then click **Log Out**.



## Select a Display Language

BeyondInsight and Password Safe can be displayed in the following languages:

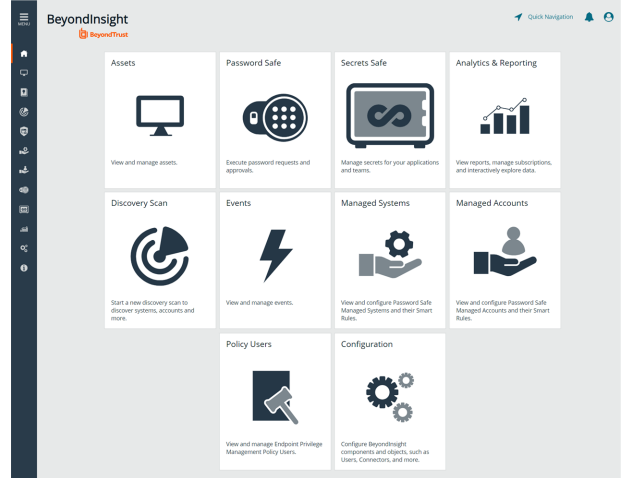
- English
- French
- German
- Japanese
- Korean
- Portuguese
- Spanish

If the **Show language picker** option is enabled in **Configuration > System > Site Options > Localization**, you can select a language from the list on the **Log In** page or by clicking the **Profile and preferences** button, and then selecting it from the **Language** dropdown.

## Navigate the Console

Once logged into the BeyondInsight console, you are taken to the **Home** page, where the suite of features is easily accessible using any of the following methods:

- Click the container cards.
- Click the icons in the left sidebar.
- Click **Menu** in the left sidebar to expand it, and then click your desired feature.
- Click **Quick Navigation** in the top-right corner or press **CTRL+K** to access a list of the commonly used features and your favorites.
  - Locate your desired feature from the list by typing at least 3 characters.
  - Click the star next to any of the features in the list to add them to your favorites. Favorites are displayed at the top of the list.
  - Click the star next to any favorite to remove it as favorite.



## Container Cards

You can quickly access the following functionality from the container cards:

- View and manage assets.
- Access Password Safe to execute password requests and approvals.
- Access Secrets Safe to view and manage team secrets.
- Access reports on collected data.
- Initiate a discovery scan to discover new systems and accounts.
- View and manage Endpoint Privilege Management events.
- View and edit managed systems.
- View and edit managed accounts.
- View and manage Endpoint Privilege Management policy users.
- Access configuration settings for BeyondInsight and Password Safe components and objects.

## Left Sidebar

The following features are available from the left sidebar:

- **Dashboard (Preview):** Customize your dynamic dashboards using the **Dashboard Editor**.
- **Assets:** Display and manage all assets. Access the **Smart Rules** page to create and manage Smart Groups. Add assets to Password Safe management.
- **Smart Rules:** View and manage Smart Rules.
- **Discovery:** Run and schedule discovery scans, review active, completed, and scheduled scans, and view the list of discovery scanners.



- **Endpoint Privilege Management:** View and manage Endpoint Privilege Management events, policies, policy users, agents, file integrity monitoring, and session monitoring, if you have an Endpoint Privilege Management license.
- **Managed Systems:** View and configure properties for Password Safe managed systems, managed databases, managed directories, managed applications, and their associated Smart Rules.
- **Managed Accounts:** View and configure properties for Password Safe managed accounts and their associated Smart Rules.
- **BeyondInsight for Unix & Linux:** View and manage hosts, settings, logs, policies, license information, and jobs for BeyondInsight for Unix & Linux.
- **Password Safe:** Access the Password Safe web portal to request passwords and remote access sessions and to approve requests.
- **Privileged Remote Access:** View Privileged Remote Access session data in a dashboard, if you have a Privileged Remote Access license and have the integration with BeyondInsight configured.
- **Secrets Safe:** View and manage team secrets.
- **Analytics & Reporting:** Access reports on collected data.
- **Configuration:** Configure BeyondInsight and Password Safe components and objects, such as users and groups, authentication settings, connectors, and much more.
- **About:** Access helpful links and support tools, such as generating a support package and analysis to send to BeyondTrust Technical Support. View the current BeyondInsight version information, as well as the history of installed versions. View version information for currently installed plugins. View the maintenance expiry date and disable or enable the **Maintenance Expiry Warning Banner**.

## Manage Toast Messages and Notifications in BeyondInsight

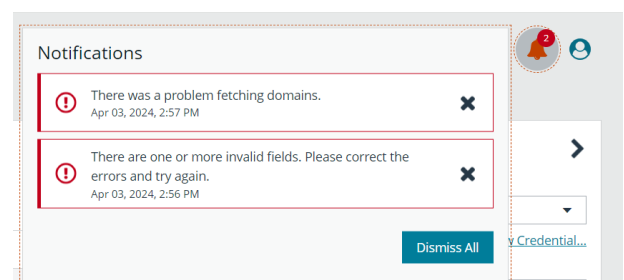
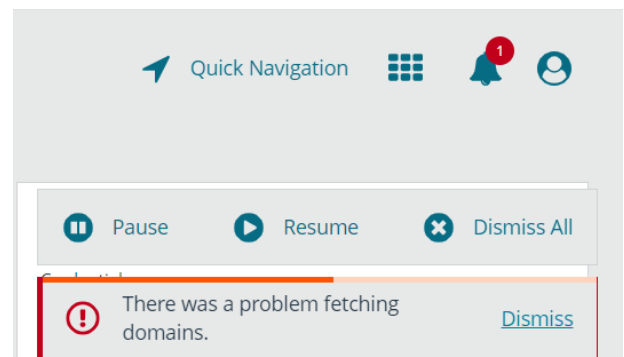
During your session, BeyondInsight displays toast messages to indicate successes, failures, warnings, and errors for actions you have taken. Toast messages auto-dismiss after 8 seconds based on a timer. There may be multiple messages displayed at once. A control bar displays above the message(s) that can be used to control the message timer. You can control the messages as follows:

- Click **Dismiss** directly in a message to dismiss that specific message immediately.
- Use the control bar above the message(s) to pause all timers, resume all timers, or dismiss all messages.

Toast messages that you haven't dismissed but instead have timed out can be reviewed in the Message Notification Center by clicking the **Notifications** (bell) icon in the top right of the console. This allows you to view more details for errors or warnings if they exist, and dismiss them.

More details about the Message Notification Center are as follows:

- Success messages are not sent to the notification center, whether or not they were dismissed.
- A max of 6 messages can be displayed at once and a scroll bar is provided to view more as needed.
- The notification center can show up to 100 of the most recent notifications, sorted from newest to oldest.
- Notifications that are older than 1 hour are not available.
- Once you log out of BeyondInsight, any notifications that existed in the notification center are cleared and are no longer available.





**Note:** A warning banner displays at the top of the screen if your maintenance contract for BeyondInsight is close to expiry or has expired. Click **More Details** to go to the **About** page, where you can disable and re-enable the warning.

A warning banner displays at the top of the screen if your installation includes any Discovery Agents earlier than version 20.1. These must be updated by the end of 2021. You can go to **Discovery > Discovery Scanners** to view all scanners in the system, and their version.

Click **Dismiss** to hide warning banners until your next login.

## Dynamic Dashboards

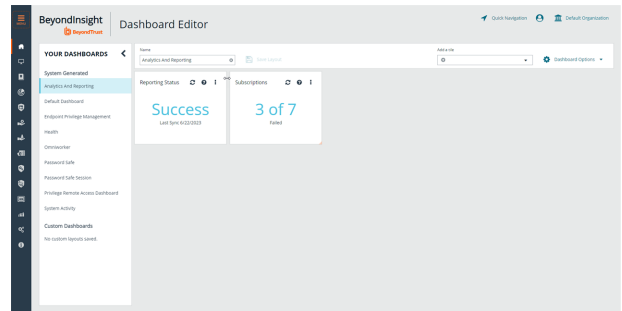


**Note:** Only admin access is supported at this time, and more features will be added in later releases.

Dynamic Dashboards provide a faster, customizable experience, allowing administrators quick access to the information that is most important to them.




To access **Your Dashboards**, click **Menu > Dashboard (Preview)**. A list of available dashboards displays on the left. BeyondInsight comes with several prebuilt dashboard cards, including:

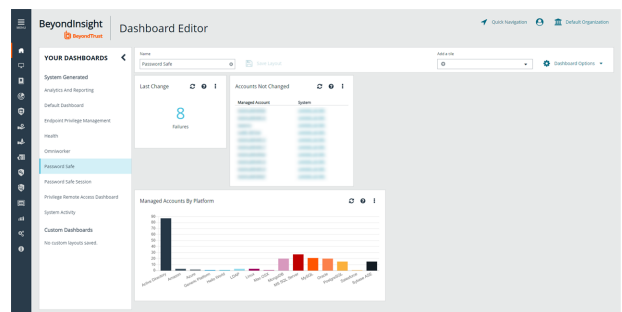
- **Analytics & Reporting**
- **Default Dashboard**
- **Endpoint Privilege Management**
- **Health**
- **Omniworker**
- **Password Safe**
- **Password Safe Session**
- **Privileged Remote Access Dashboard**
- **System Activity**



**Note:** The list of system-generated dashboards displayed can change depending on licensing, as well as data available in the system, and configuration settings. This also affects what tiles are shown in the **Add a tile** dropdown list.

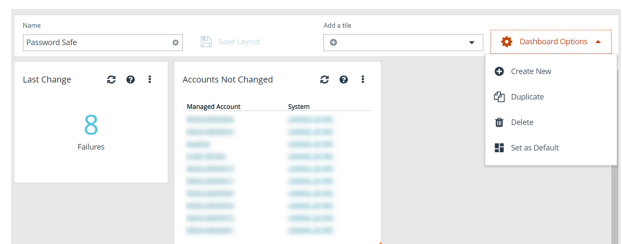
Each dashboard card comes with preset tiles, which display information for that particular feature. Icons allow you to control the tile:

-  Click to refresh information displayed.
-  Click to get information on what is displayed on the tile.
-  Click to delete the tile. You can always add the tile later if needed.



Use **Dashboard Options** to:

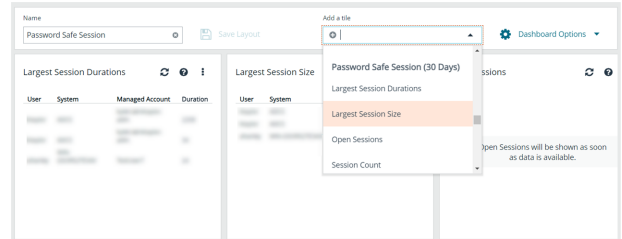
- **Create New:** Create a new empty dashboard, then add the tiles you want.
- **Duplicate:** Create a copy of the dashboard that can be modified.
- **Delete:** Delete the selected dashboard.
- **Set as Default:** Set the current dashboard as the default so it displays every time you click **Menu > Dashboards**.



## Customize a Dashboard

You can customize a dashboard to display the information that is important to you. Tiles can be deleted, added, moved, and resized to allow you a personalized and more efficient experience.

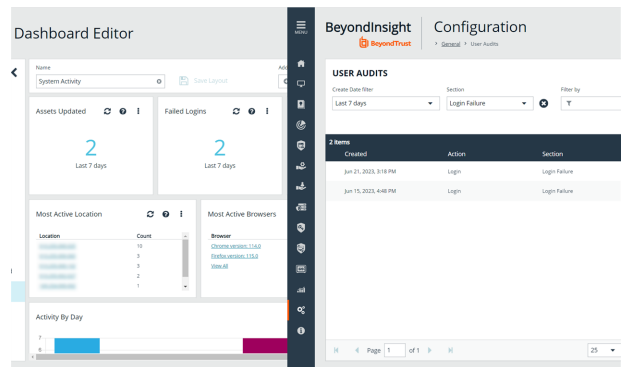
1. To create a custom dashboard, select one of the available dashboard cards. In this example we use the **Password Safe** card. If necessary, delete any of the existing tiles that come installed with that card.
2. From the **Add a tile** dropdown, select the tiles you want to add. Resize and reposition tiles in a manner that makes sense to you.
3. Next, under **Name**, give the layout a name so you can identify it.
4. Click **Save Layout**. Your custom layout now appears on the lower left side of the window, under **Custom Dashboards**.
5. If you want to make this your default layout so it opens every time you select **Menu > Dashboard**, click **Dashboard Options**, and then select **Set as Default**.



**Note:** Setting a dashboard as default causes that dashboard to be displayed when the user logs in, or every time the user clicks on **Home**, and replaces the default dashboard.

## Access Dashboard Tile Information

The information displayed on some tiles can be used to access all relevant data associated with it. In this example, by clicking on the **2** in the **Failed Logins Last 7 days** tile, you are taken directly to the **User Audits** page, where you can get full details on the 2 failed logins. The grid is automatically filtered to show login failures for the last 7 days.

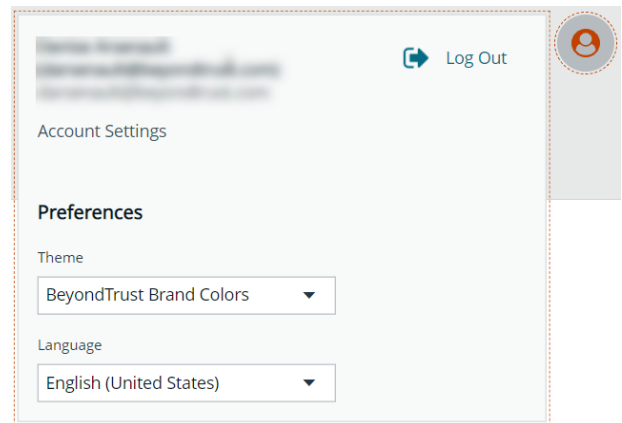


## Change and Reset Login Passwords

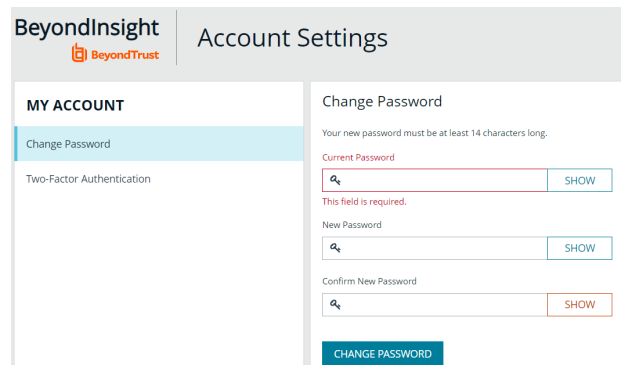
### Change Password and Two-Factor Authentication Settings

Users can maintain the security and control of their account and protect it against unauthorized access. If you are logging in with a BeyondInsight local user account, you can change your password and two-factor authentication app from the **Account Settings** page. You cannot change your password if you are logging in with Active Directory or LDAP credentials, or if your account is locked out.

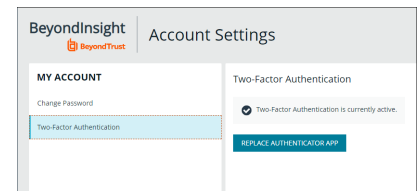
1. In the console, click the **Profile and preferences** icon in the top-right corner.
2. Click **Account Settings**.



3. Update your password, and then click **Change Password**.



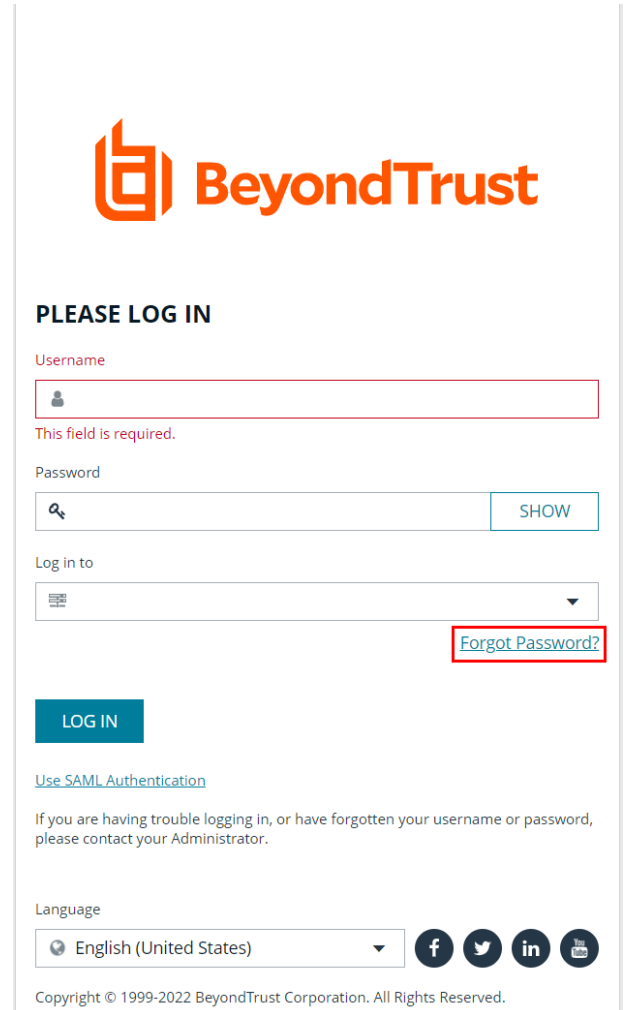
4. If your account has two-factor authentication enabled and registered with a device, you can update the authenticator app as follows:
  - Select **Two-Factor Authentication** from the **My Account** pane.
  - Click **Replace Authenticator App**.
  - Click **Reconfigure Authenticator App** to register a new authenticator app.



## Reset Password

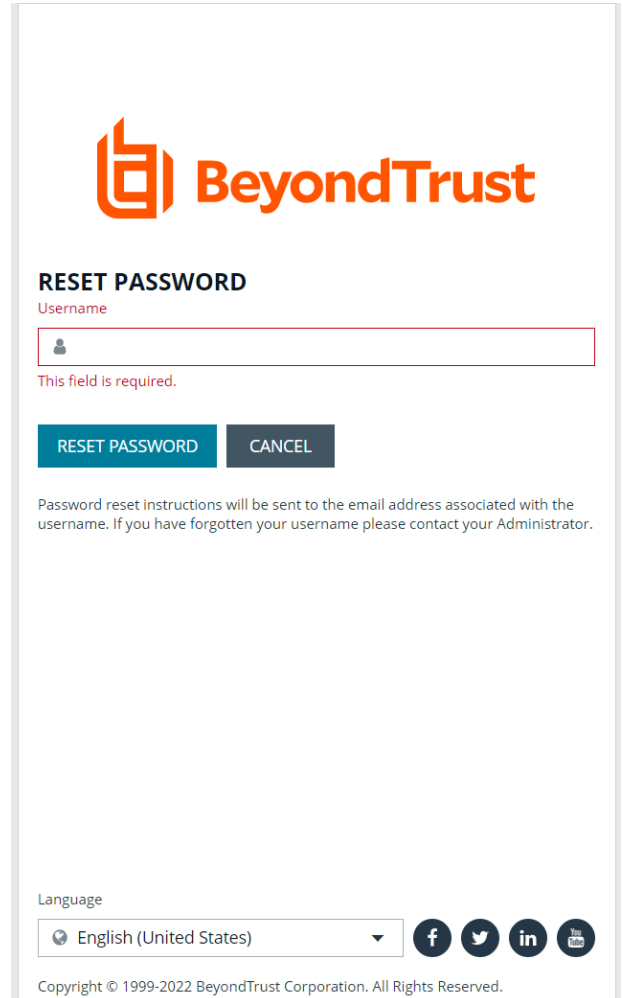
If you forget your console password, you can reset it as follows:


1. Click the **Forgot Password** link.



The screenshot shows the BeyondTrust login interface. At the top is the BeyondTrust logo. Below it is the heading "PLEASE LOG IN". There are three input fields: "Username" (with a red border and a "This field is required." error message), "Password" (with a "SHOW" button), and "Log in to" (with a dropdown arrow). A red box highlights the "Forgot Password?" link located below the "Log in to" field. Below the input fields is a blue "LOG IN" button, a link for "Use SAML Authentication", and a note: "If you are having trouble logging in, or have forgotten your username or password, please contact your Administrator." At the bottom, there is a "Language" dropdown menu set to "English (United States)" and social media icons for Facebook, Twitter, LinkedIn, and YouTube. The footer contains the copyright notice: "Copyright © 1999-2022 BeyondTrust Corporation. All Rights Reserved."

2. Enter your username, and then click **Reset Password**. An email containing a reset link is sent to the address associated with your username.





### RESET PASSWORD

Username





This field is required.

**RESET PASSWORD** **CANCEL**

Password reset instructions will be sent to the email address associated with the username. If you have forgotten your username please contact your Administrator.

Language

English (United States)

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3. Click the link in the email to be taken to the **Enter New Password** page, where you can change your password.




**Note:** Resetting the console password is not available to users logging in with Active Directory or LDAP credentials.

# Change and Set the Console Display Preferences






You can change the information displayed on BeyondInsight pages, including the columns, filters, grid size, and logos.

## Set Display Preferences

You can set display preferences on grids and pages throughout your BeyondInsight instance.

 **Note:** You can display domains and filter by domains. If the domain name is not known or the asset is not part of a domain, the field is blank. By default, the **Domain** filter is not displayed.

1. Select an area of the site, such as **Assets**.
2. Above the grid, the following options and icons are available:

- **Refresh:** Updates the displayed information with recent changes. 
- **Download:** Downloads the displayed information as a CSV file. 
- **Columns Chooser:** Select the columns to change the column headings and information displayed in the grid. 
- **Grid Configuration:** Choose the grid layout: **Compact**, **Default**, or **Expanded**. 
- **Expand Grid:** Enlarge the display area. When selected, the icon changes. It can be clicked again to **Collapse Grid**. 

 **Note:** Some options are not applicable to some grids, so fewer icons may display on those grids.

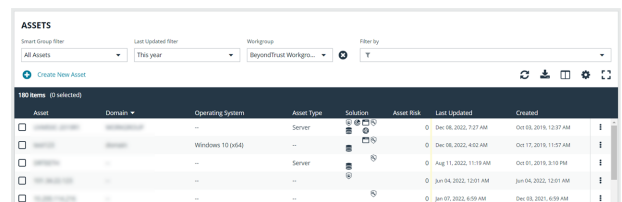
3. An option to change the number of displayed **Items per page** is located below the grid.
4. The changes appear dynamically as they are selected.

## Filter Records

Create a filter to match records you want to view on a page.

1. Select an area of the site, such as **Assets**.
2. Above the grid, there are options for filtering. The filter options available vary based on the page or grid selected. However, some common filtering options include:

- **Smart Group filter:** Select to filter information by Smart Group association.
- **Last Updated filter:** Select to filter by a specific period or a custom date range.
- **Filter by:** Choose to filter the information by **Domain**, **Operating System**, **Workgroup**, etc., or other details specific to the information displayed. For each filter selected, enter the content you want to search for in the filter box's text field.



Asset	Domain	Operating System	Asset Type	Solution	Asset Risk	Last Updated	Created
...	...	...	Server	...	...	Dec 08, 2022, 7:27 AM	Oct 01, 2016, 12:37 AM
...	...	Windows 10 (x64)	...	...	...	Dec 08, 2022, 4:52 AM	Oct 17, 2016, 11:57 AM
...	...	...	Server	...	...	Aug 11, 2022, 11:19 AM	Oct 01, 2016, 3:16 PM
...	...	...	...	...	...	Jun 14, 2022, 12:01 AM	Jun 04, 2022, 12:01 AM
...	...	...	...	...	...	Jan 07, 2022, 6:09 AM	Dec 03, 2021, 6:09 AM

3. Apply as many filters as desired.
4. The information dynamically changes to match the selections.
5. Filter selections persist if the page is reloaded. To remove a filter, click the **X** on the filter.



6. To select all records listed on all grid pages, check one box in the grid and press **Ctrl+A**.
7. To deselect all records listed on all grid pages, press **Ctrl+Shift+A**.

## Customize Console Logos

As a BeyondInsight administrator, you can add corporate logos to replace default brand logos in the management console.



**Note:** The word "BeyondInsight" remains in the footer text on the **Login** page. This cannot be changed. After an upgrade, you must repeat these steps, because the upgrade overwrites the customized images and sets them back to default.

Replace the following three SVG image files found in `<install path>/webconsole/assets/images/`:

- **app-logo-default.svg** (normal logo)
- **app-logo-darkmode.svg** (black and white version of the logo)



**Tip:** The images must be 450px × 67px.

## Role-Based Access

BeyondInsight offers a role-based delegation model so that you can explicitly assign permissions to groups on specific product features based on their role. Users are provisioned based on the permissions of their assigned groups.

You can create BeyondInsight local groups, or you can use existing Active Directory, Entra ID, or LDAP groups.



**Note:** By default, an **Administrators** user group is created. The permissions assigned to the group cannot be changed. The user account you created when you configured BeyondInsight is a member of the group.

## Create and Edit Directory Credentials

A directory credential is required for querying Active Directory (AD), Entra ID, and LDAP. It is also required for adding AD, Entra ID, and LDAP groups and users in BeyondInsight. Follow the steps below for creating each type of directory credential.



**Note:** Before you can create an Entra ID credential, you must first register and configure permissions for an application in the Entra ID tenant where the user credentials reside. For more information, please see [Register and Configure an Application in Entra ID](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/entra-id-app-registration.htm) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/entra-id-app-registration.htm>.

To create a directory credential in BeyondInsight:

1. Navigate to **Configuration > Role Based Access > Directory Credentials**.
2. Click **Create New Directory Credential**.
3. Follow the steps in the applicable section below, based on the type of directory you are creating.

## Create an Active Directory Credential

1. Select **Active Directory** for the **Directory Type**.
2. Provide a name for the credential.
3. Enter the name of the domain where the directory and user credentials reside.
4. Enable the **Use SSL** option to use a secure connection when accessing the directory.



**Note:** If **Use SSL** is enabled, **SSL authentication** must also be enabled in the *BeyondInsight* configuration tool.

4. Enter the credentials for the account that has permissions to query the directory.
5. Enable the **Use Group Resolution** option to use this credential for resolving groups from the directory.



**Note:** Only one credential can be set for group resolution per domain or server.

6. Click **Test Credential** to ensure the credential can successfully authenticate with the domain or domain controller before saving the credential.
7. Click **Create Credential**.

### New Directory Credential

➔

**Directory Type**

Active Directory

LDAP

Microsoft Entra ID

Title

Domain

Use SSL

Username

**Password**

Password  Show

Confirm Password  Show

Use Group Resolution (optional) ?

**Test Credential**

**Create Credential**

**Discard**

## Create an LDAP Credential

1. Select **LDAP** for the **Directory Type**.
2. Provide a name for the credential.
3. Enter the name of the LDAP server where the directory and user credentials reside.
4. Enable the **Use SSL** option to use a secure connection when accessing the directory.



**Note:** If **Use SSL** is enabled, **SSL authentication** must also be enabled in the *BeyondInsight* configuration tool.

5. Enter the credentials for the account that has permissions to query the directory.
6. Enable the **Use Group Resolution** option to use this credential for resolving groups from the directory.



**Note:** Only one credential can be set for group resolution per *LDAP* server.

7. Click **Test Credential** to ensure the credential can successfully authenticate with the domain or domain controller before saving the credential.
8. Click **Create Credential**.

### New Directory Credential

➤

**Directory Type**

Active Directory  
 **LDAP**  
 Microsoft Entra ID

**Title**

**LDAP Server**

**Port**

-

+

Use SSL

**Password**

**Bind DN**

**Password**

Show

**Confirm Password**

Show

Use Group Resolution (optional) ?

Test Credential

Create Credential

Discard

## Create an Entra ID Credential

1. Select **Microsoft Entra ID** for the **Directory Type**.
2. Provide a name for the credential.
3. Paste the **Client ID**, **Tenant ID**, and **Client Secret** that you copied when registering the application in your Entra ID tenant.
4. Enable the **Use Group Resolution** option to use this credential for resolving groups from the directory.



**Note:** Only one credential is supported per Entra ID tenant.

5. Click **Test Credential** to ensure the credential can successfully authenticate with the domain or domain controller before saving the credential.
6. Click **Save Credential**.

### New Directory Credential

➤

**Directory Type**

Active Directory  
 LDAP  
 Microsoft Entra ID

**Title**

**Client ID**

**Tenant ID**

**Client Secret**

Show

Use Group Resolution (optional) ?

Test Credential

Create Credential

Discard

## Edit a Directory Credential

1. From the **Directory Credentials** grid, click the vertical ellipsis for the credential, and then select **Edit**.

2. Make the changes required.



**Note:** For AD or LDAP credentials, if you change the **Domain** or **LDAP Server**, enable or disable the **Use SSL** option, or update the **Username** or **Bind DN**, you must change the password. Click **Change Password** to display fields to enter and confirm the new password.

3. Click **Test Credential** to ensure the edited credential can successfully authenticate with the domain or domain controller before saving the credential.
4. Click **Save Credential**.

### Edit Directory Credential ➤

Credentials

Title  
Active Directory ✖

Domain  
✖

Use SSL

Username  
administrator ✖

CHANGE PASSWORD

Use Group Resolution (Optional) ?

**TEST CREDENTIAL**

**UPDATE CREDENTIAL** **DISCARD CHANGES**



**Note:** To use Entra ID credentials for logging into BeyondInsight, the accounts must use SAML authentication. For more information on configuring Entra ID SAML with BeyondInsight, please see [Configure Microsoft Entra ID SAML with BeyondInsight SAML](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/security-provider.htm#configure-entra-id) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/security-provider.htm#configure-entra-id>.

## Map Directory Credentials to a Domain

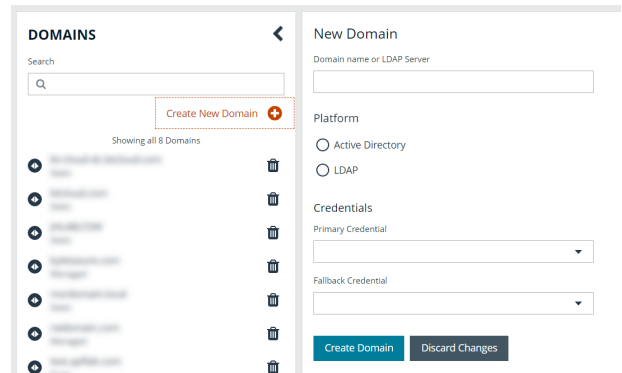
Domain management allows you to map a default primary directory credential and an optional fallback credential as preferred binding credentials used for account resolution against domains in your environment when logging in to BeyondInsight.



**Note:** If credentials are not mapped, or both mapped credentials fail, BeyondInsight attempts login following the legacy process of not using mapped credentials.

Follow these steps to add or edit primary and secondary credentials for a domain:

1. Navigate to **Configuration > Role Based Access > Domain Management**.
2. Click **Create New Domain** to create a new one.
3. Provide the name of the domain or LDAP server.
4. Select the type of platform.
5. Select a **Primary Credential** from the dropdown.
6. Select a **Fallback Credential** from the dropdown.
7. Click **Create Domain**.

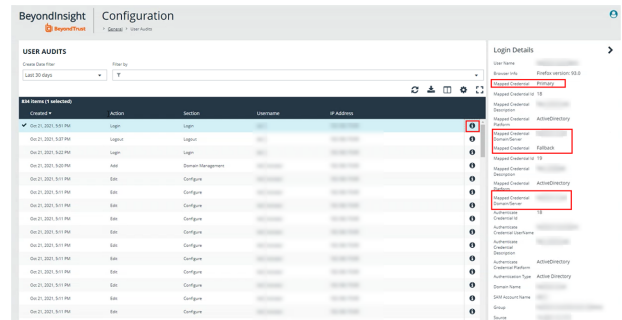


8. To edit credentials for an existing domain, select the domain from the left pane, make your edits, and then click **Save Domain**.



**Tip:** Primary and fallback credentials can include Password Safe managed accounts.

When domain management is configured for a domain and user selects the domain when logging into BeyondInsight, the specified primary and fallback credentials are used to resolve their account. The credentials used for authentication are shown in the **Login Details** for the specific login activity on the **Configuration > General > User Audits** page.



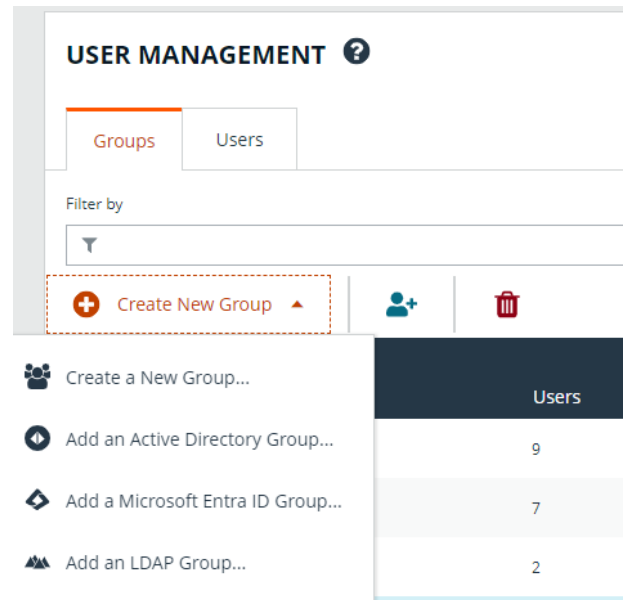


## Create and Configure Groups

Create user groups and user accounts so that your BeyondInsight administrators can log in to BeyondInsight.

When a user is added to a group, the user is assigned the permissions assigned to the group.

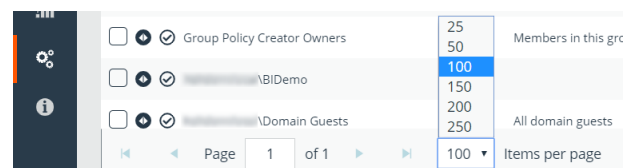
You can create BeyondInsight local groups, as well as add Active Directory, Microsoft Entra ID, and LDAP groups into BeyondInsight.



You can filter the groups displayed in the grid by type of group, name of the group, group description, and the date the group was last synchronized.



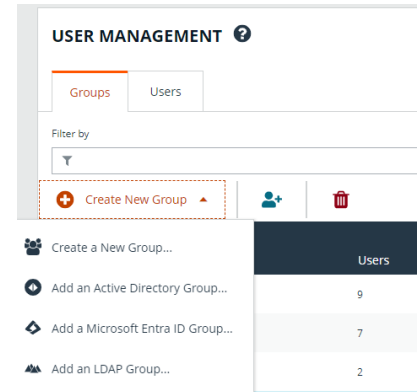
**Tip:** By default, the first 100 groups are displayed per page. You can change this by selecting a different number from the Items per page dropdown at the bottom of the grid.



## Create a BeyondInsight Local Group

To create a local group in BeyondInsight, follow the below steps:

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, click **+ Create New Group**.



3. Select **Create a New Group**.
4. Enter a **Group Name** and **Description** for the group.
5. The group is set to **Active** by default. Check the box to deactivate it, if you prefer to activate it later.
6. Click **Create Group**.

### Create New Group

Active

Group Name

New Test Group 

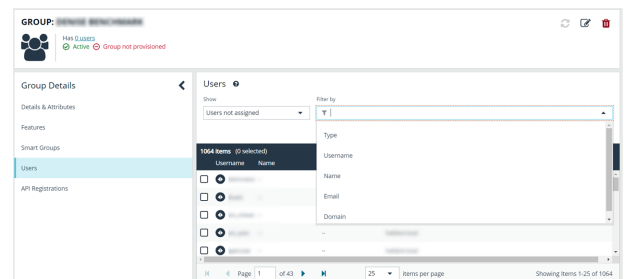
Description

New Test Group 

**CREATE GROUP**

**DISCARD**

7. Assign users to the group:
  - Under **Group Details**, select **Users**.
  - From the **Show** dropdown list, select **Users not assigned**.
  - Filter the list of users displayed in the grid by **Type**, **Username**, **Name**, **Email**, and **Domain**, if desired.



- Select the users you wish to add to the group, and then click **Assign User** above the grid.



**Note:** By default, new groups are not assigned any permissions. You must assign permissions on features and smart groups after creating a new group. For more information on permissions and how to assign them, please see "[Assign Group Permissions](#)" on page 44.



**Note:** When a local user logs in to BeyondInsight for the first time using SAML authentication, BeyondInsight provisions their account by mapping it to the groups assigned to their account.

For releases prior to 21.3, and for upgrades to the 21.3 release, if the user account's group membership has changed (in the SAML claims provided) upon subsequent logins, BeyondInsight does not deprovision the user by removing them from the groups that were initially mapped to their account. Instead, BeyondInsight maps the user to any newly assigned groups, in addition to the groups their account is already mapped to.

You can configure BeyondInsight to synchronize group membership each time a local user logs in using SAML, as follows:

1. Navigate to **Configuration > Authentication Management > Authentication Options**.
2. Under **SAML Logon for Local Users**, toggle the **Enable Group Resync** option to enable it.

For new installs of release 21.3 and later releases, this option is enabled by default.

## Add an Active Directory Group

Active Directory (AD) group members can log in to the management console and perform tasks based on the permissions assigned to the group. The group can authenticate against either a domain or domain controller. Upon logging into BeyondInsight, users can select a domain from the **Log in to** list on the **Login** page.



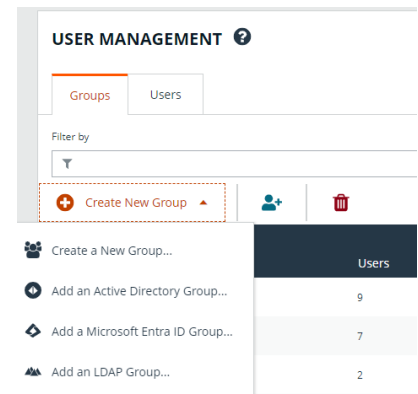
**Tip:** The **Log in to** list is only displayed on the **Login** page when there are either AD or LDAP user groups created in the BeyondInsight console. The **Log in to** list is displayed by default, but may be disabled / enabled by an admin user by toggling the **Show list of domains/LDAP servers on login page** setting from **Configuration > System > Site Options** page.



**Note:** AD users must log in to the management console at least once to receive email notifications.

Create an Active Directory Group in BeyondInsight, as follows:

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, click **+ Create New Group**.



3. Select **Add an Active Directory Group**.
4. Select a credential from the list.



**Note:** If you require a new credential, click **Create New Credential** to create one. The new credential is added to the list of available credentials.

5. If the **Domain** field is not automatically populated, enter the name of a domain or domain controller.
6. After you enter the domain or domain controller credential information, click **Search Active Directory**. A list of security groups in the selected domain is displayed.

### Active Directory Group Search ➔

Credential

[Blurred Credential]

[Create New Credential...](#)

Domain

[Blurred Domain]

Filter by Group Name

\*

Search Active Directory
Cancel



**Note:** The default filter is an asterisk (\*), which is a wild card filter that returns all groups. For performance reasons, a maximum of 250 groups from Active Directory is retrieved.

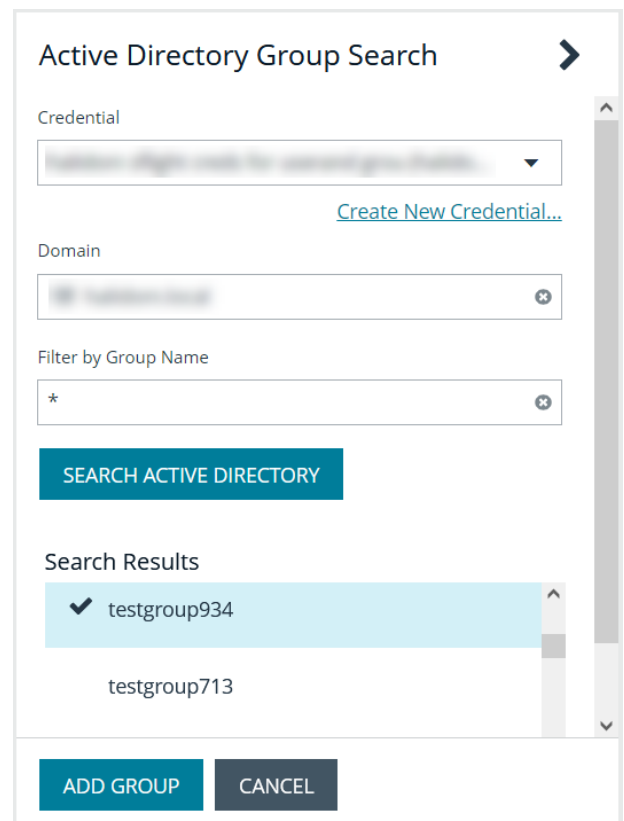
7. Set a filter on the groups to refine the list, and then click **Search Active Directory**.



**Example:** Sample filters:

- **a\*** returns all group names that start with "a"
- **\*d** returns all group names that end with "d"
- **\*sql\*** returns all groups that contain "sql" in the name

8. Select a group, and then click **Add Group**.



Active Directory Group Search

Credential

Domain

Filter by Group Name

SEARCH ACTIVE DIRECTORY

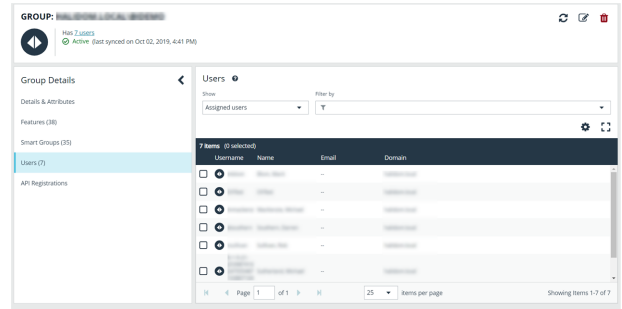
Search Results

- ✓ testgroup934
- testgroup713

ADD GROUP CANCEL

9. The group is added and set to **Active** but not provisioned or synchronized with AD. Synchronization with AD to retrieve users begins immediately.

- Once the group has been synced with AD, you can view the users assigned to the group by selecting **Users** from the **Group Details** pane.



**Tip:** Use the filters above the grid to narrow down the list of users displayed in the grid by **Type**, **Username**, **Name**, **Email**, or **Domain**, or to show users not assigned to the group.



**Note:** By default, new groups are not assigned any permissions. You must assign permissions on features and Smart Groups after creating a new group. For more information on permissions and how to assign them, please see "[Assign Group Permissions](#)" on page 44.

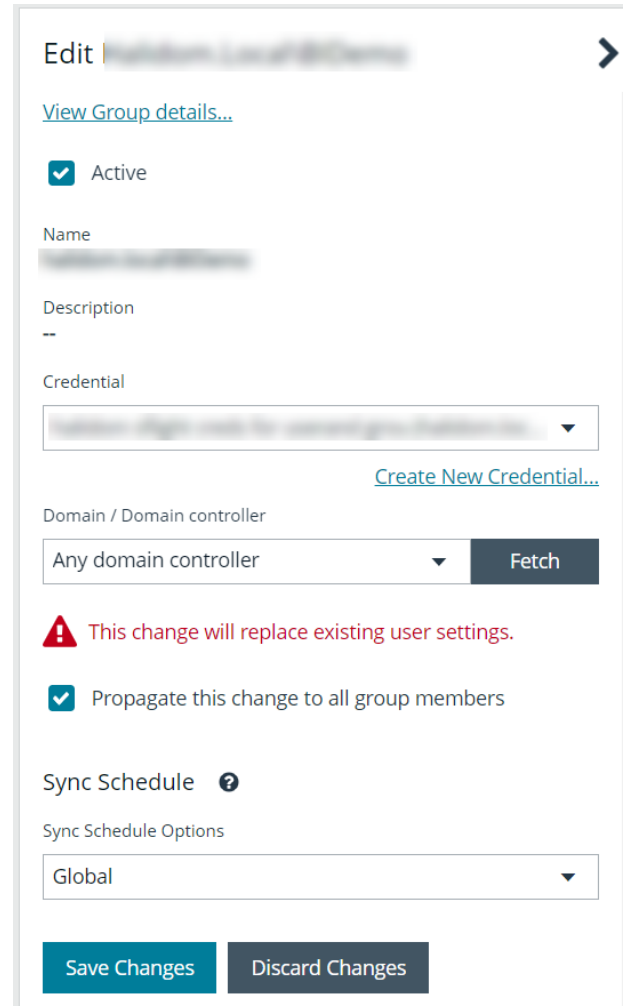


For more information on creating and editing directory credentials, please see "[Create and Edit Directory Credentials](#)" on page 23.

## Propagate Domain Changes to Group Members

Domain changes can be propagated to all users in a group by enabling the **Propagate this change to all group members** option for the group. By default, this is set to OFF. When enabled, changes to the preferred domain controller at the group level are applied to all group members.

When creating a new group, we advise turning this setting on by editing the new group details. This ensures that all users in the new group get a preferred domain controller from the initial setup of the group.



Edit [Redacted Group Name] >

[View Group details...](#)

Active


Name  
[Redacted]

Description  
--


Credential  
[Redacted] ▼

[Create New Credential...](#)

Domain / Domain controller  
Any domain controller ▼ Fetch

 This change will replace existing user settings.

Propagate this change to all group members

Sync Schedule 

Sync Schedule Options  
Global ▼

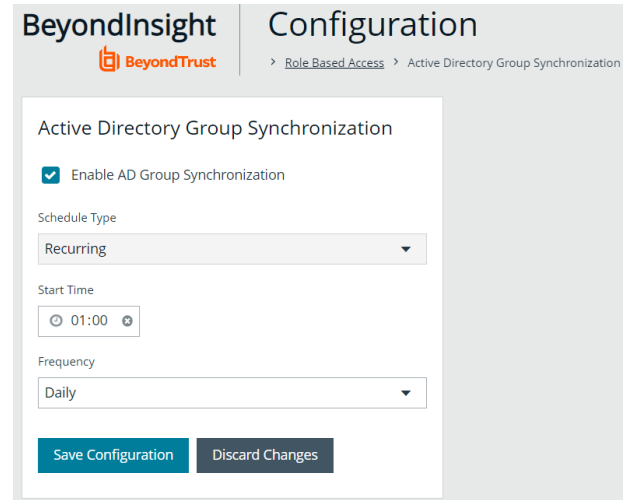
Save Changes Discard Changes

## Configure Active Directory Group Synchronization

Create and enable a recurring schedule for AD groups to automatically synchronize at a specified time and frequency. This ensures your AD groups are up to date with the latest users added to that group in Active Directory. This schedule applies globally to all AD groups in your BeyondInsight instance; however, the global schedule can be overridden at the group level and a group can be configured to be excluded from the synchronization process.

To enable **Active Directory Group Synchronization**:

1. Navigate to **Configuration > Role Based Access > Active Directory Group Synchronization**.
2. Check the **Enable AD Group Synchronization** option.
3. Specify a **Start Time**. Time is UTC.
4. Select your desired frequency of **Daily**, **Weekly**, or **Monthly**.
5. Click **Save Configuration**.



**BeyondInsight** Configuration

> Role Based Access > Active Directory Group Synchronization

Active Directory Group Synchronization

Enable AD Group Synchronization

Schedule Type

Recurring

Start Time

01:00

Frequency

Daily


Save Configuration Discard Changes


**i** For more information on overriding the global AD synchronization schedule and excluding a group from the synchronization process, please see ["Edit Basic Group Details" on page 50](#).



## Add an Entra ID Group

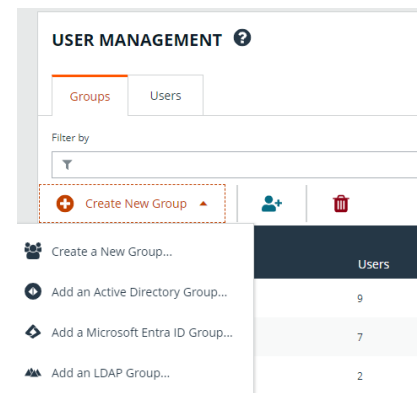
Entra ID group members can log in to the management console using SAML authentication and perform tasks based on the permissions assigned to the group. Upon logging into BeyondInsight, users can select a domain from the **Log in to** list on the **Login** page.

 **Tip:** The **Log in to** list is only displayed on the **Login** page when there are either AD or LDAP user groups created in the BeyondInsight console. The **Log in to** list is displayed by default, but may be disabled / enabled by an admin user by toggling the **Show list of domains/LDAP servers on login page** setting from **Configuration > System > Site Options** page.


 **Note:** AD users must log in to the management console at least once to receive email notifications.  
Direct Connect does not support using SAML as an authentication method. Therefore, Direct Connect is not available with Entra ID accounts.

Create an Entra ID Group in BeyondInsight, as follows:

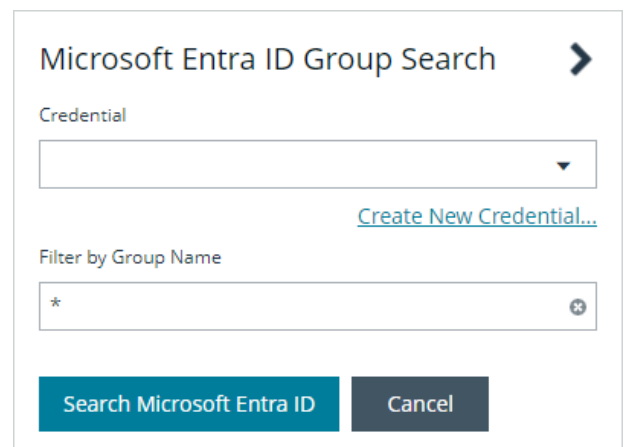
1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, click **+ Create New Group**.



3. Select **Add a Microsoft Entra ID Group**.
4. Select a credential from the list.

 **Note:** If you require a new credential, click **Create a New Credential** to create a new credential. The new credential is added to the list of available credentials.

5. Click **Search Microsoft Entra ID**. A list of security groups displays.



The screenshot shows the 'Microsoft Entra ID Group Search' dialog box. It has a 'Credential' dropdown menu, a 'Create New Credential...' link, and a 'Filter by Group Name' input field with an asterisk. At the bottom are 'Search Microsoft Entra ID' and 'Cancel' buttons.



**Note:** For performance reasons, a maximum of 250 groups from Entra ID is retrieved. The default filter is an asterisk (\*), which is a wildcard filter that returns all groups. Use the group filter to refine the list.

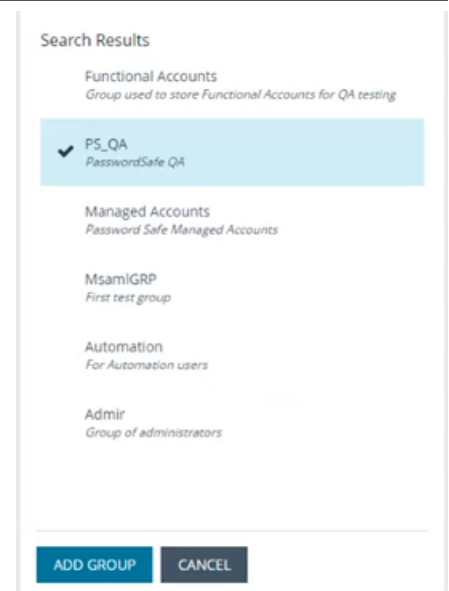
6. Set a filter on the groups that are to be retrieved, and then click **Search Microsoft Entra ID**.



**Example:** Sample filters:

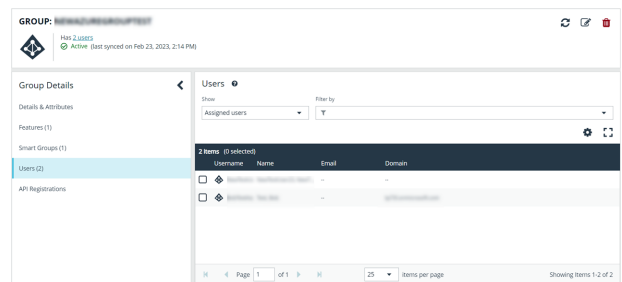
- **a\*** returns all group names that start with a.
- **\*d** returns all group names that end with d.
- **\*sql\*** returns all groups that contain sql in the name.

7. Select a group, and then click **Add Group**.



8. The group is added and set to **Active** but not provisioned or synchronized with Entra ID. Synchronization with Entra ID to retrieve users begins immediately.

9. Once the group has been synced with Entra ID, you can view the users assigned to the group, as well as unassigned users, by selecting **Users** from the **Group Details** section and then using the filters.



**Note:** By default, new groups are not assigned any permissions. You must assign permissions on features and Smart Groups after creating a new group. For more information on permissions and how to assign them, please see ["Assign Group Permissions" on page 44](#).



**Note:** To use Entra ID credentials for logging into BeyondInsight, the accounts must use SAML authentication. For more information on configuring Entra ID SAML with BeyondInsight, please see [Configure Microsoft Entra ID SAML with BeyondInsight SAML](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/security-provider.htm#configure-entra-id) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/authentication/security-provider.htm#configure-entra-id>.



For more information on creating and editing directory credentials, please see "[Create and Edit Directory Credentials](#)" on page [23](#).

## Add an LDAP Group

LDAP group members can log in to the BeyondInsight console and perform tasks based on the permissions assigned to the group. The group can authenticate against either a domain or domain controller. Upon logging in to BeyondInsight, users can select a domain or LDAP server from the **Log in to** list on the **Login** page.



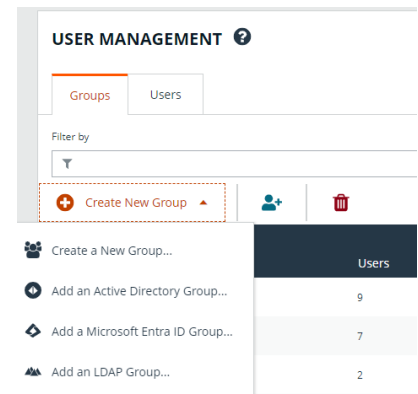
**Tip:** The **Log in to** list is only displayed on the **Login** page when there are either AD or LDAP user groups created in the BeyondInsight console. The **Log in to** list is displayed by default, but may be disabled / enabled by an admin user by toggling the **Show list of domains/LDAP servers on login page** setting from **Configuration > System > Site Options** page.



**Note:** LDAP users must log in to the BeyondInsight console at least once to receive email notifications.

Create an LDAP Group in BeyondInsight, as follows:

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, click **+ Create New Group**.



3. Select **Add an LDAP Group** from the list.

4. Select a credential from the list.



**Note:** If you require a new credential, click **Create a New Credential** to create a new one. The new credential is added to the list of available credentials.

### LDAP Group Search ➔

Credential

LDAP Cred
▼

[Create New Credential...](#)

Server

Base DN

▼

Fetch

Filter by Group Name

\*

Search LDAP

Cancel

5. Enter the name or IP address for the LDAP server.
6. Click **Fetch** to load the list of Base DNs.
7. If the **Base DN** list does not populate, manually enter the details and click **Add as New Option** to populate the list.

### LDAP Group Search ➔

Credential

LDAP Cred
▼

[Create New Credential...](#)

Server

Base DN

DC=examplelab, DC=local
▲

Fetch

Add As New Option

No options found.

Search LDAP

Cancel

8. Select the Base DN.
9. To filter the group search, enter keywords in the group filter or use a wild card.

10. Click **Search LDAP**.



**Example:** Sample filters:

- **a\*** returns all group names that start with a.
- **\*d** returns all group names that end with d.
- **\*sql\*** returns all groups that contain sql in the name.

11. Select a group, and then click **Continue to Add Group**.

### LDAP Group Search ➤

Credential  
LDAP Cred ▼  
[Create New Credential...](#)

Server

Base DN  
 Fetch

Filter by Group Name

Search LDAP

Search Results

✓ miners

Continue To Add Group Cancel

12. Select the **Group Membership Attribute** and **Account Naming Attribute**.
13. Enter a **Base Distinguished Name**, if not automatically populated.
14. Click **Add Group**.

### LDAP Group Search ➔

Active

Name  
**miners**

Description  
--

Group Membership attribute

Account Naming attribute

Base Distinguished Name

15. The group is added and set to **Active** but is not provisioned or synchronized with LDAP. Synchronization with LDAP to retrieve users begins immediately.
16. Once the group has been synced with LDAP, you can view the users assigned to the group, as well as unassigned users, by selecting **Users** from the **Group Details** section, and then using the filters.

**GROUP:** miners (ldap://dc=,dc=local)

View 12 users Active Group not provisioned Last synced on Aug 24, 2021, 8:21 PM

**Group Details**

Details & Attributes

Features

Smart Groups

**Users (12)**


API Registrations


**Users**

Show: Assigned users Filter by: T

12 items (0 selected)	Username	Name	Email	Domain
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...
<input type="checkbox"/>	...	...	...	...

Showing items 1-12 of 12

 **Note:** By default, new groups are not assigned any permissions. You must assign permissions on features and smart groups after creating a new group. For more information on permissions and how to assign them, please see ["Assign Group Permissions"](#) on page 44.

 For more information on creating and editing directory credentials, please see ["Create and Edit Directory Credentials"](#) on page 23.

## Assign Group Permissions

The following permissions may be assigned to user groups in BeyondInsight for each feature and Smart Group.

Permission	Description
No Access	Users cannot access the selected feature or Smart Group. In most cases, the feature is not visible to the users.
Read Only	Users can view selected areas, but cannot change information.
Full Control	Users can view and change information for the selected feature.

Permissions for a BeyondInsight user must be assigned cumulatively and at the group level. You must assign permissions on features and Smart Groups after creating a new group in order for users in that group to be able to access features in the product. For example, if you want a BeyondInsight administrator to manage discovery scans only, then you must assign full control for the following features:

- **Management Console Access**
- **Asset Management**
- **Reports Management**
- **Scan – Job Management**
- **Scan Management**



**Note:** In addition to the group permissions noted, for the group to be provisioned, there must be at least one enabled Smart Group for the group. This sets the scope for the features.





## Assign Features Permissions







**Note:** The features listed are based upon your BeyondInsight license. Only features relevant to your licensed installation are listed.

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, click the vertical ellipsis for the group.
3. Select **View Group Details**.
4. Under **Group Details**, click **Features**.
5. Filter the list of features displayed in the grid using the **Show** and **Filter by** dropdowns.
6. Select the features you wish to assign permissions to.
7. Click **Assign Permissions** above the grid.
8. Select **Assign Permissions Read Only**, **Assign Permissions Full Control**, or **Disable Permissions**.

The following table provides information on the features permissions you can assign to your groups.

Feature	Provides Permissions To:
Analytics & Reporting	Log in to the console and access <b>Analytics &amp; Reporting</b> to generate and subscribe to reports. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> After you create a group, go to the <b>Analytics &amp; Reporting Configuration</b> page and run the process daily cube job. Data between the management console and the reporting cube must be synchronized.</p> </div>
Appliance (U-Series) Access	Grant access to manage the U-Series Appliance as a BeyondInsight user.
Asset Management	Create Smart Rules. Edit and delete buttons on the <b>Asset Details</b> window. Create Active Directory queries. Create address groups.
Attribute Management	Add, rename, and delete attributes when managing user groups.
Credential Management	Add and change credentials when running scans and deploying policies.
Directory Credential Management	Grant access to the configuration area where directory credentials are managed. This feature must be enabled to support access to directory queries as well.
Directory Query Management	Grant access to the configuration area where directory queries are managed. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> Access to <b>Directory Credential Management</b> must also be granted.</p> </div>
Domain Management	Grants the user permission to configure mappings of bind credentials to domains for account resolution.
Endpoint Privilege Management	Grant access to the Endpoint Privilege Management features, excluding Policy Editor and Reporting.
Endpoint Privilege Management Policy Editor	Grant access to the Endpoint Privilege Management Policy Editor feature.

Feature	Provides Permissions To:
Endpoint Privilege Management Reporting	Grant access to the Endpoint Privilege Management Reporting feature.
Endpoint Privilege Management for Unix & Linux	Grant access to the Endpoint Privilege Management for Unix & Linux features.
File Integrity Monitoring	Work with <b>File Integrity</b> rules.
License Reporting	View the <b>Licensing</b> folder in <b>Analytics &amp; Reporting</b> (MSP reports, Endpoint Privilege Management for Windows, Endpoint Privilege Management for Mac true-up reports, and Assets Scanned report).
Management Console Access	Access the BeyondInsight management console.
Manual Range Entry	Allow the user to manually enter ranges for scans and deployments rather than being restricted to smart groups. The specified ranges must be within the selected smart group.
Option Management	Change the application options settings (for example, account lockout and account password settings).
Options - Connectors	Access the configuration area where connectors are managed.
Options - Scan Options	Access the configuration area where scan options are managed.
Password Safe Account Management	Grant read or write permissions to the following features on the <b>Managed Accounts</b> page and through the public API: <ul style="list-style-type: none"> <li>• Bulk delete accounts</li> <li>• Add accounts to a Quick Group</li> <li>• Remove accounts from a Quick Group</li> <li>• Add, edit, and delete accounts</li> </ul>
Password Safe Admin Session	Password Safe web portal admin sessions.
Password Safe Admin Session Reviewer	Grant a user admin session reviewer permissions only.
Password Safe Global API Quarantine	Access to the Quarantine APIs.
Password Safe Bulk Password Change	Change more than one password at a time.
Password Safe Agent Management	Grant a user administrator permissions to the <b>Configuration &gt; Privileged Access Management Agents</b> page.
Password Safe Configuration Management	Grant a user administrator permissions to the <b>Configuration &gt; Privileged Access Management</b> page.
Password Safe Domain Management	Check the <b>Read</b> and <b>Write</b> boxes to permit users to manage domains.
Password Safe Policy Management	Grant a user administrator permissions to the <b>Configuration &gt; Privileged Access Management Policies</b> page.
Password Safe Role Management	Allows a user to manage roles, provided they have the following permissions: <b>Password Safe Role Management</b> and <b>User Account Management</b> .
Password Safe System Management	Read and write managed systems through the public API.
Password Safe Ticket System Management	This feature is not presently used.

Feature	Provides Permissions To:
Reports Management	Run scans, create reports, and create report categories.
Scan - Job Management	Activate <b>Scan</b> and <b>Start Scan</b> buttons.  Activate <b>Abort</b> , <b>Resume</b> , <b>Pause</b> , and <b>Delete</b> on the <b>Job Details</b> page.
Scan - Report Delivery	Allow a user to set report delivery options when running a scan: <ul style="list-style-type: none"> <li>• Export Type</li> <li>• Notify when complete</li> <li>• Email report to</li> <li>• Include scan metrics in email (only available for All Audits Scan)</li> </ul>
Scan Management	Delete, edit, duplicate, and rename reports on the <b>Manage Report Templates</b> page.  Activate <b>New Report</b> and <b>New Report Category</b> .  Activate the <b>Update</b> button on the <b>Edit Scan Settings</b> view.
Secrets Safe	Provides access to Secrets Safe for all members of the selected group.
Session Monitoring	Use the session monitoring features.
Smart Rule Management – Asset	Grants permission to view, create, and edit asset Smart Rules; editing is limited to Smart Rules that are enabled for groups the user is a member of. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <b>Note:</b> Newly created Smart Rules created by a non-administrator are automatically enabled with full permissions for all groups where the user is a member. For more information, see "<a href="#">Use Smart Rules to Organize Assets</a>" on page 74.           </div>
Smart Rule Management – Managed Account	Grants permission to view, create, and edit managed account Smart Rules; editing is limited to smart rules that are enabled for groups the user is a member of. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <b>Note:</b> Newly created Smart Rules created by a non-administrator are automatically enabled with full permissions for all groups where the user is a member. For more information, see "<a href="#">Use Smart Rules to Organize Assets</a>" on page 74.           </div>
Smart Rule Management – Managed System	Grants permission to view, create, and edit managed system Smart Rules; editing is limited to smart rules that are enabled for groups the user is a member of. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <b>Note:</b> Newly created Smart Rules created by a non-administrator are automatically enabled with full permissions for all groups where the user is a member. For more information, see "<a href="#">Use Smart Rules to Organize Assets</a>" on page 74.           </div>
Smart Rule Management – Policy User	Grants permission to view, create, and edit policy user Smart Rules; editing is limited to smart rules that are enabled for groups the user is a member of. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <b>Note:</b> Newly created Smart Rules created by a non-administrator are automatically enabled with full permissions for all groups where the user is a member. For more information, see "<a href="#">Use Smart Rules to Organize Assets</a>" on page 74.           </div>

Feature	Provides Permissions To:
Ticket System	View and use the ticket system.
Ticket System Management	Mark a ticket as inactive. The ticket no longer exists when <b>Inactive</b> is selected.
User Accounts Management	Add, delete, or change user groups and user accounts.  A minimum of read access to Directory Credential Management must also be granted to enable creation of AD and LDAP Groups.
User Audits	View audit details for management console users on the <b>User Audits</b> page.
U-Series Appliance Administrator	Provides access to manage all aspects of the U-Series Appliance.
U-Series Appliance Backups	Provides access to manage the <b>Backup and Restore</b> options of the U-Series Appliance.
U-Series Appliance High Availability	Provides access to manage the <b>High Availability</b> features of the U-Series Appliance.
U-Series Appliance Login	Provides access to manage the U-Series Appliance as a BeyondInsight user.
U-Series Appliance Manage RDP	Provides access to manage Remote Desktop Protocol to the U-Series Appliance.
U-Series Appliance Patching	Provides access to manage updates to the U-Series Appliance.



For more information, please see the *Managed Accounts* section in the *BeyondInsight and Password Safe API Guide* at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/ps/api/password-safe/managed-accounts.htm>.

## Features Permissions Required for Configuration Options

Configuration Option	Feature and Permission
Active Directory Queries	Asset Management - Full Control.
Address Groups	Asset Management - Full Control.
Attributes	Asset Management - Full Control.
Connectors	Asset Management and Management Console Access - Full Control.
Organizations	User Accounts Management - Full Control.
Password Safe Connections	Member of the Built-In Administrators group.
Endpoint Privilege Management Module	Management Console Access and Endpoint Privilege Management - Full Control.
Scan Options	Scan Management - Full Control.
Services	Member of the Built-In Administrators group.
User Audits	User Audits - Full Control.
User Management	Everyone can access.  Users without the Full Control permission to <b>User Account Management</b> feature can edit only their user record.
Workgroups	User Accounts Management - Full Control.

## Assign Smart Groups Permissions

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, click the vertical ellipsis for the group.
3. Select **View Group Details**.
4. Under **Group Details**, select **Smart Groups**.
5. Filter the list of Smart Groups displayed in the grid using the **Show** and **Filter by** dropdowns.
6. Select the Smart Groups you wish to assign permissions to.
7. Click **Assign Permissions** above the grid.
8. Select **Assign Permissions Read Only**, **Assign Permissions Full Control**, or **Disable Permissions**.

## Edit and Delete Groups

The below sections detail how to make basic edits to the settings and options of BeyondInsight local groups, Active Directory groups, Entra ID groups, and LDAP groups using the **Edit Group** functionality, as well how to update more advanced group details such as assigning permissions, updating group members, and managing API registrations.

## Edit Basic Group Details

Administrators can edit the following basic details for groups in BeyondInsight:

### BeyondInsight Local Groups

- For BeyondInsight local groups, administrators can update the following:
  - Deactivate or activate a group by enabling or disabling the **Active** status.
  - Modify the **Group Name**.
  - Modify the **Description**.

### Active Directory Groups

For Active Directory groups, administrators can update the following:

- Deactivate or activate a group by enabling or disabling the **Active** status.
- Change the credential used to query the group in Active Directory.
- Select a new domain or domain controller used for accessing the group in Active Directory.
- Enable or disable the option to propagate domain changes to all members of the group.
- Select **Sync Schedule Options** to control how the user accounts in this group are automatically synchronized on a periodic schedule. The following options are available:
  - **Global**: This is the default setting which uses the schedule settings specified in the **Active Directory Group Synchronization** configuration section.
  - **Custom**: Select **Custom** to ignore the global synchronization schedule and specify a unique synchronization schedule for this group instead.
  - **No Custom or Global**: Select this option to omit this group from any automatic synchronization. The group can still be synchronized manually.

### Entra ID Groups


- For Entra ID groups, administrators can update the following:
  - Deactivate or activate a group by enabling or disabling the **Active** status.

## LDAP Groups

- For LDAP groups, administrators can update the following:
  - Deactivate or activate a group by enabling or disabling the **Active** status.
  - Change the credential used to query the group in LDAP.
  - Select a new **Group Membership attribute** from the list. The following options are available:
    - **member**
    - **uniqueMember** (default)
    - **memberUID**
  - Select a new **Account Naming attribute** from the list. The following options are available:
    - **mail**
    - **cn**
    - **sAMAccountName**
    - **uid**
    - **userPrincipalName**
  - Edit the **Base Distinguished Name**.

### To edit a group in BeyondInsight:

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, locate the group using the available filter options above the grid and select it.
3. Click the vertical ellipsis for the group, and then select **Edit Group**.
4. In the **Edit Group** pane, update the details as required, and then click **Update Group**.

 For more information on configuring Active Directory Group Synchronization settings, please see "[Configure Active Directory Group Synchronization](#)" on page 36.

## Edit Advanced Group Details

Administrators can edit the following advanced details for groups:

- Update the group permissions for specific BeyondInsight and Password Safe features.
- Update the group permissions for specific Smart Groups.
- Edit Password Safe roles for Smart Groups
- Add and remove users from local groups.
- Manually synchronize group users for Active Directory and LDAP groups.
- Enable and disable API Registrations for the group.

Follow these steps to access advanced details for a group:

1. Navigate to **Configuration > Role Based Access > User Management**.

2. From the **Groups** tab, locate the group using the available filter options above the grid and select it.
3. Click the vertical ellipsis for the group, and then select **View Group Details**.
4. From the **Group Details** pane, you can select **Features**, **Smart Groups**, **Users**, and **API Registrations** to make updates for the group. Specific updates you can make for each of these options are detailed in the below sections.

## Update Group Permissions for Features

Permissions provide the members of the group access to BeyondInsight system components and Password Safe features. Assign permissions to groups for specific features, as follows:

1. From the **Group Details** pane, click **Features**.
2. From the **Features** grid, select the feature.
3. Click **Assign Permissions** above the grid.
4. Click **Assign Permissions Read Only**, **Assign Permissions Full Control**, or **Disable Permissions**.

## Update Group Permissions for Smart Groups

Assign permissions to groups to provide members of the group access to smart groups as follows:

1. From the **Group Details** pane, click **Smart Groups**.
2. From the **Smart Groups** grid, select the Smart Group.
3. Click **Assign Permissions** above the grid.
4. Click **Assign Permissions Read Only**, **Assign Permissions Full Control**, or **Disable Permissions**.

## Edit Password Safe Roles for Smart Groups

Password Safe roles define the actions users can take when using the Password Safe web portal for password releases or access to applications. Assign Password Safe roles to groups as follows:

1. From the **Group Details** pane, click **Smart Groups**.
2. From the **Smart Groups** grid, click the vertical ellipsis for the Smart Group.
3. Select **Edit Password Safe Roles**.
4. Check or uncheck each role, as required.
5. Click **Save Roles**.

## Add Users to Local BeyondInsight Groups

Manually add users to local groups in BeyondInsight as follows:

1. From the **Group Details** pane, click **Users**.
2. Filter the **Users** grid to show users not assigned.
3. Select the user or users, and then click **Assign User** above the grid.



## Sync Group Users for Active Directory and LDAP Groups

To ensure your AD and LDAP groups contain the most recent group members, you can manually synchronize with AD and LDAP to retrieve the group's users. There are two methods for manually synchronizing group users, as follows:

- From the group header, above the **Group Details** pane, click the **Sync group users** icon.
- From the **User Management** page, click the vertical ellipsis for the group and select **Sync group users**.

## Manage Group API Registrations

API Registrations provide a way to integrate part of the BeyondInsight and Password Safe functionality into your applications using an API key. Manage API registrations for groups as follows:

1. From the **Group Details** pane, click **API Registrations**.
2. Check or uncheck the API registrations to enable or disable them for this group or click **Select All** to enable all of them. Changes are automatically saved.



**Tip:** Use the filter above the list to narrow down the list of API registrations or to quickly find a specific registration by its name. If you need to create a new API registration, click the **Manage API Registrations** link above the filter box to go to the **API Registrations** page where you can create a new one.



For more detailed information on features permissions, Password Safe roles, and API registrations, please see the following:

- ["Assign Group Permissions" on page 44](#)
- [Configure API Registration](#)
- [Password Safe Roles](#)

## Delete a Group



**Note:** Groups associated with a secret or credential in Secrets Safe cannot be deleted. Users attempting this action receive the following warning:



Unable to delete group, as it contains secrets which must first be removed.

[Dismiss](#)

Administrators can delete groups as follows:

1. Navigate to **Configuration > Role Based Access > User Management**.
2. From the **Groups** tab, locate the group using the available filter options above the grid and select it.
3. Click the **Delete** button above the grid.
  - Alternatively, click the vertical ellipsis for the group, and then select **Delete Group**.

## Create and Manage User Accounts

User accounts create the user identity that BeyondInsight uses to authenticate and authorize access to specific system resources. You can create local BeyondInsight users, as well as add Active Directory, Entra ID, and LDAP users into BeyondInsight.

You can also add application users, which are used to represent applications that interface with the public API. Application users cannot log in to the BeyondInsight console. They can only authenticate and interact with the public API.



**Note:** A user account must be a member of a BeyondInsight user group because permissions to features are assigned at the group level. If a user is not a member of any groups in BeyondInsight, the user cannot log in to the console, and application users cannot authenticate with the public API.

### Create a BeyondInsight Local User Account

1. Navigate to **Configuration > Role Based Access > User Management**.
2. Click the **Users** tab to display the list of users in the grid.
3. Click **Create New User** above the grid.
4. Select **Create a New User**.

5. Provide a **First Name**, **Last Name**, **Email**, and **Username** for the new user. These fields are required.



**Note:** You may use an email address for the username.

6. Provide a password and confirm it.



**Note:** The password must meet the complexity requirements as defined by your default password policy, defined at **Configuration > Role Based Access > Password Policy**.

7. Optionally, enter the user's contact information.
8. Select an **Activation Date** and an **Expiration Date** for the user account.



**Note:** These dates are based on UTC time on the BeyondInsight server and are considered during the user's login attempt. The attempt fails if the user account is not yet active or if the expiration date has passed.

9. Check **User Active** to activate the user account.
10. Leave the **Account Locked** and **Account Quarantined** options unchecked.
11. Check the two **Authentication Options**, if applicable:
  - **Override Smart Card User Principal Name:** when enabled, allows a BeyondInsight user with a smart card that has a different Subject Alternative Name to log in to BeyondInsight and maps the smart card to the user.
  - **Disable Login Forms:** when enabled, disallows SAML users from using the standard BeyondInsight log in form. Check this option only if SAML is configured in your environment. Users authenticate with third party identity provider.
12. Select a **Two-Factor Authentication** method and mapping information, if applicable.
13. Click **Create User**.

### Create New User ➤

**Identification**

First Name

Last Name

Email

Username

New Password  Show

Confirm New Password  Show

**Contact Information**

Work Phone

Home Phone

Mobile Phone

**User Status**

Activation Date

Expiration Date

User Active

Account Locked

Account Quarantined

**Authentication Options** ?

Override Smart Card User Principal Name

Disable Forms Login

Two-Factor Authentication

Create User Discard

14. The user is created and **User Details > Groups** is displayed. You can filter the list of groups displayed by type, name, or description. Select a group, and then click **Assign Group** above the grid.



**Note:** The user must belong to at least one group

- To remove the user from a group, select **Assigned Groups** from the **Show** dropdown, and then select a group and click **Remove Group**.

## Update Default Password Policy for Local Users

The default password policy defines the password complexity requirements for local BeyondInsight users. This includes the minimum and maximum length of the password and the type of characters required and permitted in the password. Update the default password policy as follows:

- Go to **Configuration > Role Based Access > Password Policy**.
- Enter a name for the policy and an optional description.
- Set the minimum and maximum password length, and set the types of characters to be used: uppercase, lowercase, numeric, and non-alphanumeric.
- Click **Update Password Policy** when done. You can also discard changes or reset to default if desired.

### Default Password Policy Details

Password Policy Name  
7 characters remaining.

Description (Optional)

Minimum length

Maximum length

**Uppercase Characters**  
 Permit uppercase characters  
 Minimum number of required uppercase characters

Allow only the following uppercase characters

**Lowercase Characters**  
 Permit lowercase characters  
 Minimum number of required lowercase characters

Allow only the following lowercase characters

**Numeric Characters**  
 Permit numeric characters  
 Minimum number of required numeric characters

Allow only the following numeric characters

**Non-Alphanumeric Characters**  
 Permit non-alphanumeric characters  
 Minimum number of required non-alphanumeric characters

Allow only the following non-alphanumeric characters

## Add an Active Directory User

Active Directory users can log in to the management console and perform tasks based on the permissions assigned to their groups. The user can authenticate against either a domain or domain controller.



**Note:** Active Directory users must log in to the management console at least once to receive email notifications.

1. Navigate to **Configuration > Role Based Access > User Management**.
2. Click the **Users** tab to display the list of users in the grid.
3. Click **Create New User** above the grid.
4. Select **Add an Active Directory User**.
5. Select a credential from the list.



**Note:** If you require a new credential, click **Create a New Credential** to create a new credential. The new credential is added to the list of available credentials.

6. If not automatically populated, enter the name of a domain or domain controller.
7. After you enter the domain or domain controller credential information, click **Search Active Directory**. A list of users in the selected domain is displayed.



**Note:** For performance reasons, a maximum of 250 users from Active Directory is retrieved. The default filter is an asterisk (\*), which is a wild card filter that returns all users. Filter by user name to refine the list.



**Example:** Sample filters:

- **a\*** returns all group names that start with a.
- **\*d** returns all group names that end with d.
- **\*sql\*** returns all groups that contain sql in the name.

8. Click **Search Active Directory**.
9. Select a user, and then click **Add User**.
10. Assign at least one group to the user.

## Add an Entra ID User

Entra ID users can log in to the management console and perform tasks based on the permissions assigned to their groups. The user can authenticate against either a domain or domain controller.

### Active Directory User Search ➔

Credential ▼

[Create New Credential...](#)

Domain ⊞

⊞ ⊞

Filter by Name ⊞

\* ⊞

SEARCH ACTIVE DIRECTORY
CANCEL



**Note:** *Entra ID users must log in to the management console at least once to receive email notifications.*

1. Navigate to **Configuration > Role Based Access > User Management**.
2. Click the **Users** tab to display the list of users in the grid.
3. Click **Create New User** above the grid.
4. Select **Add a Microsoft Entra ID User**.
5. Select a credential from the list.



**Note:** *If you require a new credential, click **Create a New Credential** to create a new credential. The new credential is added to the list of available credentials.*



**Note:** *For performance reasons, a maximum of 250 users from Entra ID is retrieved. The default filter is an asterisk (\*), which is a wild card filter that returns all groups. Filter by user name to refine the list.*



**Example:** *Sample filters:*

- *a\** returns all group names that start with a.
- *\*d* returns all group names that end with d.
- *\*sql\** returns all groups that contain sql in the name.

6. Click **Search Microsoft Entra ID**.
7. Select a user, and then click **Add User**.
8. Assign at least one group to the user.

## Microsoft Entra ID User Search

Credential

[Create New Credential...](#)

Filter by Name

**Search Microsoft Entra ID**

**Cancel**

## Change the Preferred Domain Controller for Active Directory User Accounts

The preferred domain controller for a user is set by the group they are in, provided that the group was created with the propagate option turned on, and that this action happened before the user was set up.

If you want to change the preferred domain controller for a user, edit the user, select an appropriate credential, and then select a different preferred domain controller from the list.



**Note:** Any future change to the preferred domain controller at the group level can overwrite this setting if the propagate switch is turned on.

Edit User
➤

[View User Details...](#)

First Name

Last Name

Email

Username

Account Quarantined

Credential

[Create New Credential...](#)

Domain / Domain controller  
 Fetch

Authentication Options ?

Override Smart Card User Principal Name

Disable Forms Login

Two-Factor Authentication

Update User
Discard

## Add an LDAP User

1. Navigate to **Configuration > Role Based Access > User Management**.
2. Click the **Users** tab to display the list of users in the grid.
3. Click **Create New User** above the grid.
4. Select **Add an LDAP User** from the list.

5. Select a credential from the list.



**Note:** If you require a new credential, click **Create a New Credential** to create a new credential. The new credential is added to the list of available credentials.

6. Click **Fetch** to load the list Domain Controllers, and then select one.
7. To filter the user search, enter keywords in the user filter or use a wild card.
8. Click **Search LDAP**.

### LDAP User Search ➔

Search for LDAP users to give access to the system.

Credential  

▼

[Create New Credential...](#)

Server

Domain / Domain controller  

▼
FETCH

Object class

Name attribute search

Filter by null

SEARCH LDAP
CANCEL

9. Select a user, and then click **Add User**.
10. Assign at least one group to the user.

## Add an Application User

Application users represent applications that interface with the BeyondInsight public API. Application users cannot log in to the BeyondInsight console. They can only authenticate and interact with the public API, using Client ID and Client Secret for credentials within the OAuth client credential flow.

An API Registration type of API Access Policy must be assigned to an application user, and is used for processing IP rules. To create an application user:

1. Go to **Configuration > Role Based Access > User Management > Users**.
2. Click **Create New User**.
3. Select **Add an Application User** from the dropdown list. The **Create New Application User** screen is displayed.
4. Add a username.
5. Under **API Access Policy**, select the policy.
6. Copy the information from the **Client ID** and **Client Secret** fields for later use.
7. Click **Create User**.



8. Assign the user to a group that has the required permissions to access BeyondInsight and Password Safe features.
  - Click the vertical ellipsis for the user, and then select **View User Details**.
  - From the **User Details** pane, click **Groups**.
  - Locate the group, select it, and click **Assign Group** above the grid.

## Recycle the Client Secret for an Application User

When editing an application user, you have an option to recycle their secret. Once recycled, you can copy or view the new secret. When a secret is recycled and the user account is updated with this change, the previous client secret is no longer valid.

To recycle the secret for an application user:

1. Go to **Configuration > Role Based Access > User Management > Users**.
2. Locate the application user in the grid.
3. Click the ellipsis to the right of the user, and then select **Edit User Details**.
4. Click the **Recycle** icon to the right of the **Client Secret**.
5. Click **Recycle** on the confirmation message that displays.
6. Copy the new secret for later use.
7. Click **Update User**.

## View and Update OAuth Secret Expiry

The user's secret will eventually expire. The **Users** grid has an **OAuth Secret Expiry** column, which you can use to view what is close to expiring. The default duration of a client secret is **365** days. You can adjust the lifetime of the secret from the **Authentication Options** configuration area in BeyondInsight. Updating this value only changes the secret expiry date for new application users and recycled client secrets. Older secrets cannot be updated.

To view the OAuth Secret Expiry for an application user:

1. Go to **Configuration > Role Based Access > User Management > Users**.
2. Locate the application user. The **OAuth Secret Expiry** column lists the date and time that a client secret for that user expires.

To update the duration for client secrets:

1. Go to **Configuration > Authentication Management > Authentication Options**.
2. Under **Application User Authentication Settings**, enter the new duration of the client secret in the **Client Secret Expiry** field.
3. Click **Update Application User Authentications Settings**.

## Edit a User Account

Administrators can edit user details such as change the name, username, email, and password, update active status, lock and unlock the account, and update multi-factor authentication settings as follows:

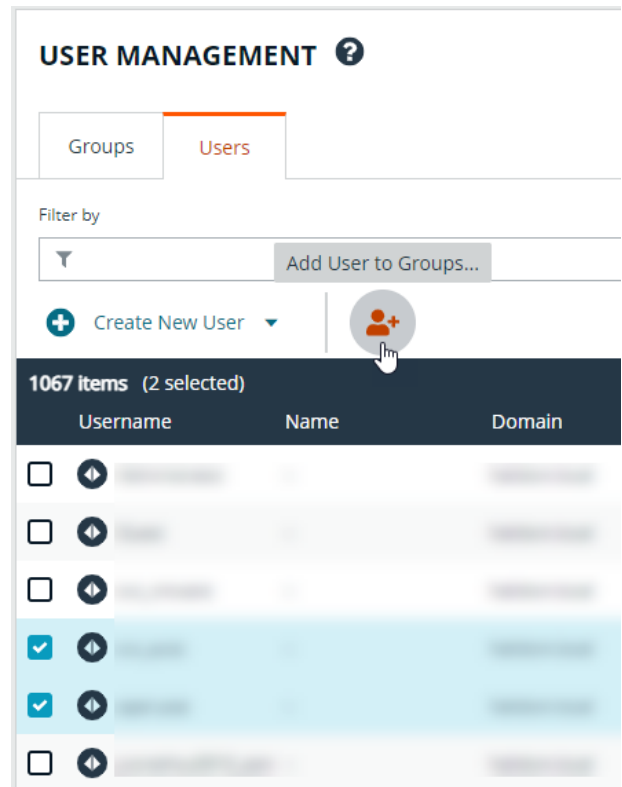
1. Navigate to **Configuration > Role Based Access > User Management**.
2. Click **Users** to display the list of users in the grid.
3. Optionally, filter the list of users displayed in the grid using the **Filter By** dropdown.

4. Select a user, click the vertical ellipsis button, and then select **Edit User Details**.
5. In the **Edit User** pane, update the details as required, and then click **Update User**.

**i** For more information on creating and editing directory credentials, please see "[Create and Edit Directory Credentials](#)" on page [23](#).

## Add User to Groups

1. From the **User Management** page, click the **Users** tab to display the list of users in the grid.
2. Optionally, filter the list of users displayed in the grid using the **Filter by** dropdown.
3. Select a user or multiple users, and then click the **Add User to Groups** button above the grid.



The screenshot shows the 'USER MANAGEMENT' interface. At the top, there are two tabs: 'Groups' and 'Users', with 'Users' being the active tab. Below the tabs is a 'Filter by' dropdown menu. To the right of the filter is a button labeled 'Add User to Groups...'. Below the filter is a '+ Create New User' button with a dropdown arrow. To the right of this is a circular icon with a person and a plus sign, which is being clicked by a mouse cursor. Below these elements is a table with the following columns: 'Username', 'Name', and 'Domain'. The table header indicates '1067 items (2 selected)'. The table contains several rows, with two rows highlighted in light blue, indicating they are selected. Each row has a checkbox on the left, which is checked for the selected rows.

4. Search for the group or groups, and then select the group or groups to assign currently selected users to the selected groups.







**Note:** If a group already contains all of the selected users, a check mark is displayed next to the group name.

### Add 2 Users To Groups ➤

Please enter three or more characters to begin searching against the Group Name or Description. If a group already contains all of the currently selected users, its result will display as checked. When one or more currently selected users are not part of a group, its result will display as unchecked. Check the box to assign all currently selected users to that group.

Search local groups

-  Administrators
-  mo-admin-reviewer
-  Non-Admin access to all
-  Unix BI Admins

## Delete a User Account

Administrators can delete user accounts as follows:

1. Navigate to **Configuration > Role Based Access > User Management**.
2. Click the **Users** tab to display the list of users in the grid.
3. Optionally, filter the list of users displayed in the grid using the **Filter by** dropdown.
4. For local accounts, select the user, click the **Delete** button above the grid, and then click **Delete** to confirm.
5. For directory accounts, select the user, click the vertical ellipsis, select **Delete User**, and then click **Delete** to confirm.



**Note:** For auditing purposes, if a user account is linked to any Password Safe session recordings, you cannot delete the account; however, you may disable the account.



**Note:** Directory accounts may be deleted only if they do not belong to any groups.

## Audit Console Users in BeyondInsight

You can track the following activities of users logging into the console:

- Login and logout times
- IP address from where the user logged in
- Password change events
- Other actions taken such as configuring user settings

To view user audit data:

1. Go to **Configuration > General > User Audits**.
2. User the filters above the grid to easily locate specific items listed. You can filter grid items by the following criteria:
  - Date the user took the action
  - Type of action taken
  - Which section of the application the action was taken
  - Username
  - IP Address
  - Key words of the item
  - Key words in the item details
3. Click the **i** icon for the item to view more specific details about the action taken.



**Tip:** You can export all of the data in the grid to a CSV file by clicking the **Download all** (downward arrow) button above the grid.



**Note:** User audits older than 120 days are purged from the database. Navigate to **Configuration > System > Data Retention > Application Maintenance** to change the data retention setting for user audits.

## Overview of BeyondInsight Tools

BeyondInsight provides a set of tools to help you organize assets for scanning.

Depending on the number of assets that you want to scan or the critical nature of some of your assets, consider organizing the assets using address groups or Active Directory queries which can be part of a Smart Rule.

The following list provides examples on ways you can use these tools:

- Create an IP address group that organizes assets by a range of IP addresses, including CIDR notation and named hosts.
- Use an Active Directory query that will organize assets by organizational unit. Create a Smart Rule and use the query as your selection criteria.
- Change the properties for assets, and then use the attributes as the selection criteria in the Smart Rule.

Scans can return a lot of information. To help you review scan results, you can create filters and set preferences on the **Assets** page to easily review scan results.



For more information, please see ["Change and Set the Console Display Preferences" on page 20](#).

## Create an Address Group

When creating a Smart Rule, you can create an address group to use as an IP address filter. An address group can contain included or excluded IP addresses. IP addresses are entered as a

- Single IP address
- IP range
- CIDR Notation
- Named host



**Note:**

- The BeyondInsight user must be a member of the **Administrators** group or be assigned the **Full Control** permission on the **Asset Management** and the applicable **Smart Rule Management** feature(s) to be able to create and edit Smart Rules.
- Users assigned **Read Only** permissions on these features may only view the details of Smart Rules.



For more information, please see "[Create and Configure Groups](#)" on page 29.

## Create an Always Address Group

You can create an address group and name it **Always**. The Discovery Scanner is designed to recognize this address group name and includes the group in every scan, regardless if the group is selected in the scan job. The address group can include and exclude IP addresses.

The next time a scan runs, the address group is synchronized with the Discovery Scanner. The IP addresses, whether they are included or omitted, are considered part of the running scan.



**Example:** If the **Always** address group is configured with **10.10.10.60** and **buffett-laptop (omitted)**, it scans **10.10.10.50** and **buffett-laptop**. The results are as follows:

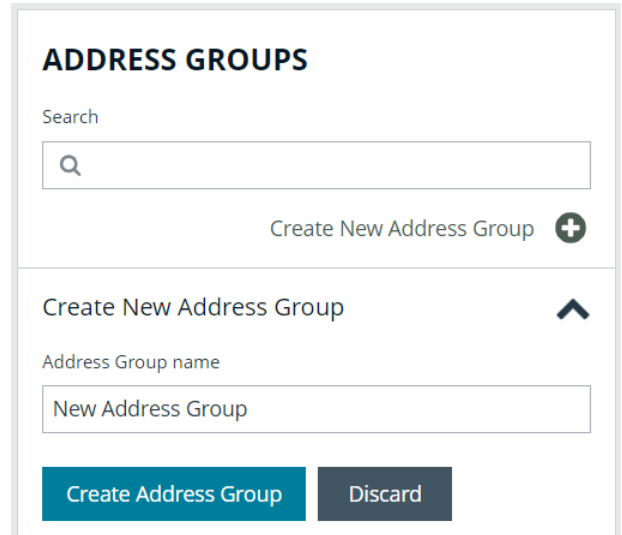
- The scan includes **10.10.10.60** since this IP address was added to the **Always** address group.
- The scan excludes **buffett-laptop** since this asset was explicitly omitted in the **Always** address group.
- **10.10.10.50** is scanned as usual.



**Note:** If an asset was scanned and later added to the **Always** address group as **Omit**, the asset is not scanned but might be displayed in the report. This only occurs with some reports.


1. Go to **Configuration > Discovery Management > Address Groups**.

2. Click **Create New Address Group**.
3. Enter a name for the address group, and then click **Create Address Group**.




**ADDRESS GROUPS**

Search

Create New Address Group 

---

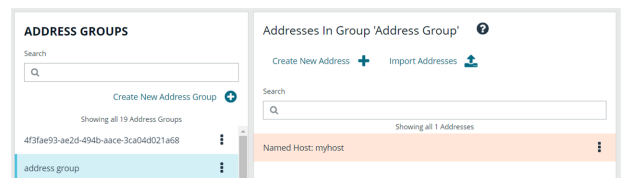
Create New Address Group 

Address Group name

New Address Group


Create Address Group Discard

4. Select the address group, and then from the right pane, click **Create New Address** to manually add the IP addresses. Or, click **Import Addresses** to import them into the group using a file.






**ADDRESS GROUPS**



Search

Create New Address Group 

Showing all 19 Address Groups


4f3fae93-ae2d-494b-aace-3ca04d021a68	
address group	

**Addresses In Group 'Address Group'** 

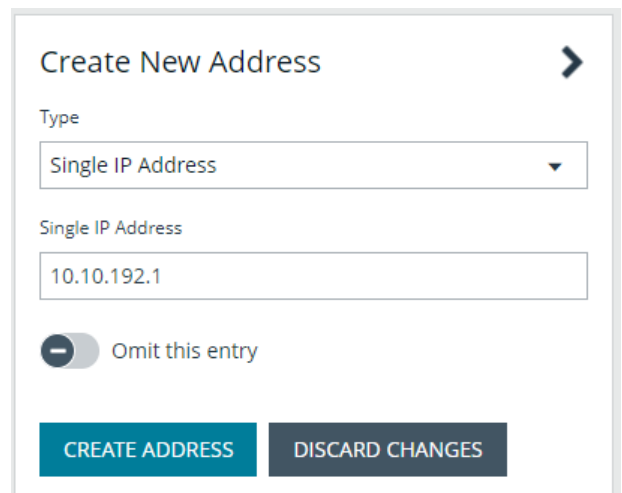
Create New Address  Import Addresses 


Search

Showing all 1 Address

Named Host: myhost	
--------------------	---

5. If manually adding the addresses:
  - Select the type from the list: **Single IP Address**, **IP Range**, **CIDR Notation**, or **Named Host**.
  - Enter the IP addresses, CIDR Notation, or host name, depending on which type you selected.
  - Enable **Omit this entry** to excluded addresses.
  - Click **Create Address**.




**Create New Address** 

Type

Single IP Address

Single IP Address

10.10.192.1

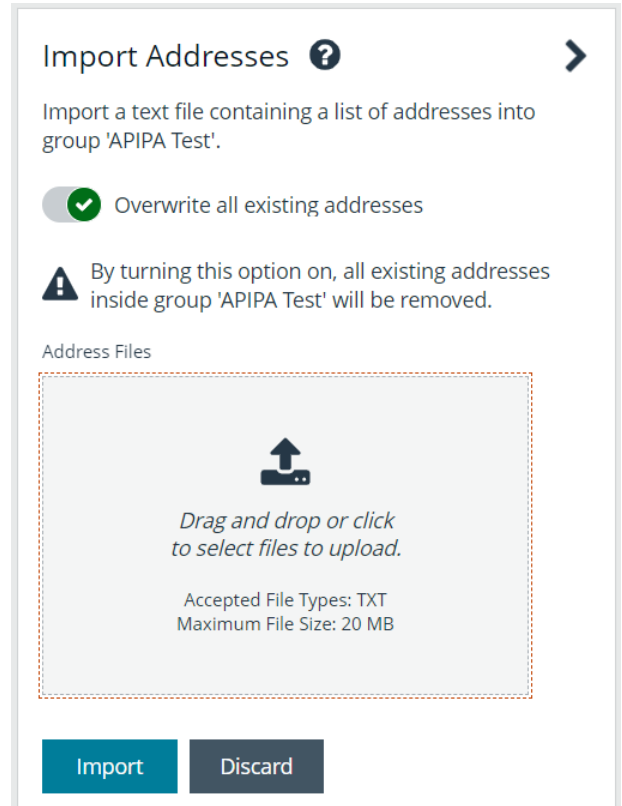
 Omit this entry

CREATE ADDRESS DISCARD CHANGES

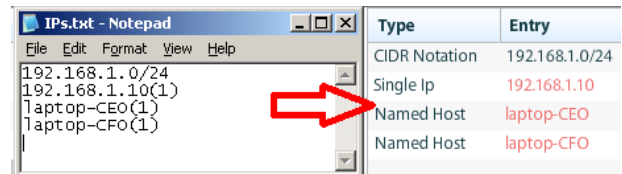
6. If importing the addresses:

- Enable the **Overwrite all existing addresses** option, if desired.
- Click **Drop File** to upload the import file.
- Click **Upload File**.

**Note:** The list in your import file depends on your particular needs. The list can contain all IP addresses that you wish to exclude. To exclude IP addresses, use the format: **192.x.x.x (1)**.



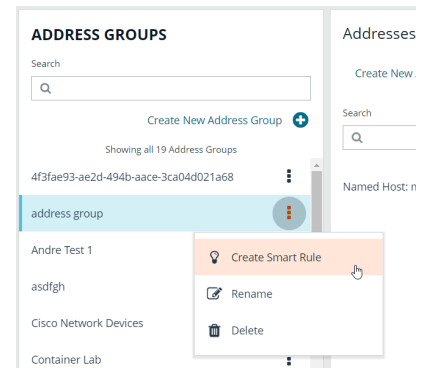
The image shows an example of how a CIDR Notation, an excluded IP address, and excluded named hosts are displayed after importing.



## Create a Smart Rule Based on an Address Group

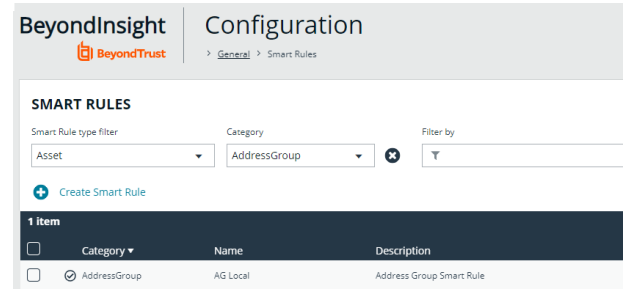
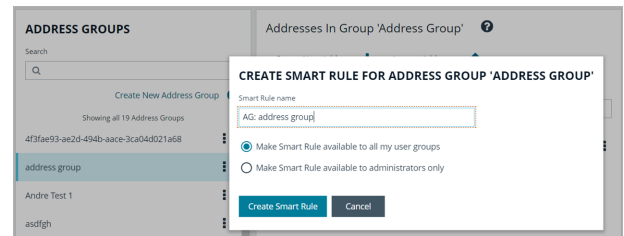
When configuring an address group, you can choose to create a Smart Rule based on the address group.

1. From the **Address Groups** pane, click the vertical ellipsis for the address group.
2. Select **Create Smart Rule**.





3. Leave the default name, or name the Smart Rule as desired.
4. Select the option to make the Smart Rule available to all user groups or the option to make the Smart Rule available to administrators only.
5. Click **Create Smart Rule**.
6. A message stating *Smart Rule has been created for this Address Group* appears.
7. The group is displayed on the **Configuration > Smart Rules** page.



## Create and Update Directory Queries

You can create an Active Directory or LDAP query to retrieve information from Active Directory or LDAP to populate a Smart Rule. To work with directory queries, the BeyondInsight user must be a member of the **Administrators** group or assigned the **Asset Management** permission.

### Create a Directory Query

Create a new directory query or clone an existing query as follows:

1. In BeyondInsight, navigate to **Configuration > Role Based Access > Directory Queries**.
2. Click **Create New Directory Query** or click the vertical ellipsis for an existing query and select **Clone**.
3. Select **Active Directory** or **LDAP** from the **Directory Type** list.



**Note:** Cloned queries keep the same directory type as the query being cloned.

4. Enter a name for the query in the **Title** field.
5. Select a stored credential for running this query or click **Create New Credential** to be taken to the **Directory Credentials** page where you can add a new one.



**Note:** At minimum, the credential must have **Read** permissions on the computer assets you are enumerating.

6. Enter the directory path for the **Query Target**, or click **Browse** to search for a path and add it.
7. Select a scope to apply to the container: **This Object and All Child Objects** or **Immediate Children Only**.
8. Select an object type: **Computer Objects** or **User Objects**.
9. Enter the directory path for the **Query Target**, or click **Browse** to search for a path and add it.
10. Select a scope to apply to the container: **This Object and All Child Objects** or **Immediate Children Only**.
11. Select an object type: **Computer Objects** or **User Objects**.
12. Enable or disable the **Dynamically refresh results each use** option.
13. Provide a **Name** and **Description** or use the \* wild card character to match multiple values for the **Basic Filter**.
14. Optionally, click **Advanced Filter** to provide an **LDAP Query**.
15. Click **Test** to ensure the query returns expected results. We recommend you preview results before saving the query.
16. Click **Create Directory Query**.
17. A warning message displays the following: *Creating or modifying Directory Queries can have a significant impact to the onboarding Smart Rules that use this query. Are you sure you want to save this Directory Query?*
  - Click **Confirm** to create the query.
  - Click **Cancel** to return to the query form to make changes.
18. If you did not test the query (step 15), a warning message displays the following: *Are you sure you want to save this Directory Query without previewing the results?*
  - Click **Confirm** to create the query without testing it.
  - Click **Cancel** to return to the query form to make changes or test the query before saving it.

## Update a Directory Query

Update an existing directory query as follows:

1. In BeyondInsight, navigate to **Configuration > Role Based Access > Directory Queries**.
2. Locate the query in the grid and click the vertical ellipsis to the right of it.
3. Select **Edit** from the menu.
4. Modify query details as necessary, and then click **Test** to ensure the query returns expected results. We recommend you preview results before saving the query.
5. Click **Update Directory Query**.
6. A warning message displays the following: *Creating or modifying Directory Queries can have a significant impact to the onboarding Smart Rules that use this query. Are you sure you want to save this Directory Query?*
  - Click **Confirm** to update the query.
  - Click **Cancel** to return to the query form if wish to make changes.
7. If you did not test the query after making changes, a warning message displays the following: *Are you sure you want to save this Directory Query without previewing the results?*
  - Click **Confirm** to save the updated query without testing it.
  - Click **Cancel** to return to the query form if you wish to make changes or test the query before saving it.



**Note:** If you're changing the **Query Target**, we recommend testing the query before saving the changes to ensure the changes are working the way you expect. Any Smart Rules using that query will use the new target list the next time the rule processes.



For more information, please see the following:

- ["Create and Configure Groups" on page 29](#)
- ["Create and Edit Directory Credentials" on page 23](#)

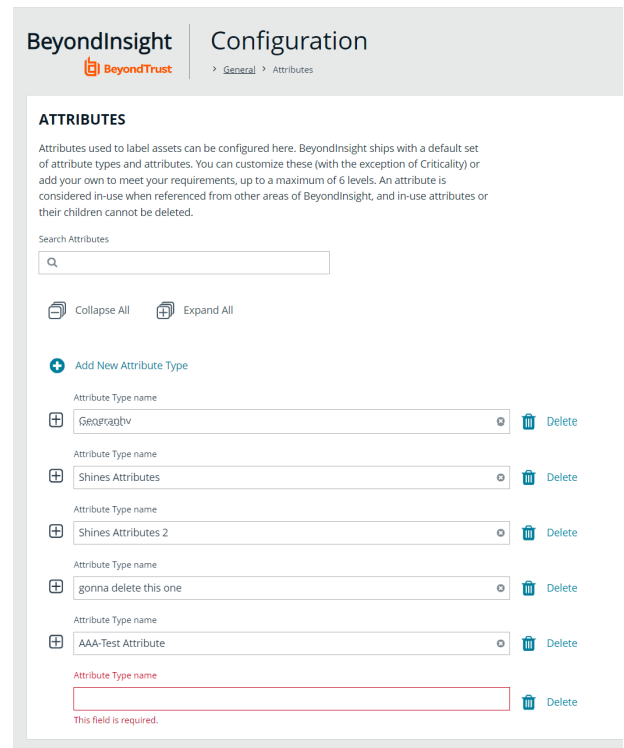
## Attributes and Attribute Types

Attributes can be used to label assets, and you can set attributes for each asset in a group using a Smart Rule. BeyondInsight ships with a default set of attributes that can be customized, except for the **Criticality** type, and you can also add new attribute types and attributes to meet your requirements.

**i** For more information, please see "[Use Smart Rules to Organize Assets](#)" on page 74.

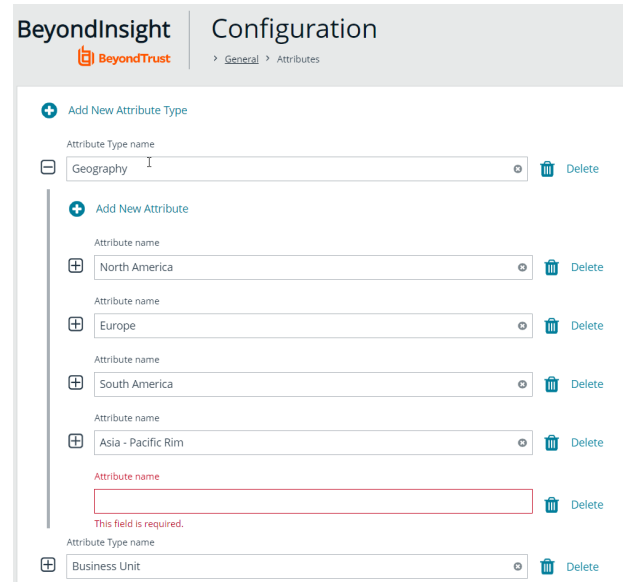
### Add a New Attribute Type

1. In the BeyondInsight Console go to **Configuration > General > Attributes**.
2. Click **+ Add New Attribute Type**.
3. Type a name for the attribute type, and then press **Enter**.



## Add a New Attribute

1. Click the plus sign for the desired attribute type to expand its attributes.
2. Click **+ Add New Attribute**.
3. Type a name for the attribute, and then press **Enter**.



The screenshot shows the 'BeyondInsight Configuration' interface. The breadcrumb trail is 'General > Attributes'. There are two main sections:

- Add New Attribute Type:** This section has a header with a plus sign and the text 'Add New Attribute Type'. Below it is a form with the label 'Attribute Type name' and a text input field containing 'Geography'. To the right of the input field is a trash icon and the text 'Delete'.
- Add New Attribute:** This section has a header with a plus sign and the text 'Add New Attribute'. It contains a list of attributes, each with a plus sign icon, a text input field, and a trash icon with 'Delete' text:
  - Attribute name: North America
  - Attribute name: Europe
  - Attribute name: South America
  - Attribute name: Asia - Pacific Rim
  - Attribute name: (empty field with a red border and the message 'This field is required.') Below this field is a trash icon and 'Delete'.

At the bottom of the interface, there is another section with a plus sign icon and the label 'Business Unit', with a text input field and a trash icon with 'Delete' text.

## Use Smart Rules to Organize Assets

A Smart Rule is a filter that you can use to organize assets into Smart Groups. Use an asset-based Smart Rule to organize assets based on the filters selected.



**Note:**

- The *BeyondInsight* user must be a member of the **Administrators** group or be assigned the **Full Control** permission on the **Asset Management** and the applicable **Smart Rule Management** feature(s) to be able to create and edit Smart Rules.
- Users assigned **Read Only** permissions on these features may only view the details of Smart Rules.

When a non-administrator user creates a Smart Group, the Smart Group is automatically associated with:

- Read permissions for all groups the user is a member of
- Full Control permissions for all groups the user is a member of and has the **Asset Management** and **Smart Rule Management** permissions for

Use a Smart Rule to register assets as Smart Groups. This allows you to:

- Run Discovery Scans
- Monitor and view assets

Smart Rules update results automatically, ensuring assets match the criteria and are current.

## Use Smart Rule Filters and Smart Groups

There are many built-in filters available that you can use when creating Smart Rules. You can also create address groups or Active Directory queries from the **Configuration** page to use as Smart Rule filters.

You can use more than one filter to refine or extend the scope of assets in a Smart Rule. Filters can be joined with **and** (match **ALL** criteria) or **or** (match **ANY** criteria) conditions. If you select to match **ALL**, every indented filter must be set to **True** for an asset to be included. If you select to match **ANY**, only one of the indented filter items must be set to **True** for an asset to be included. The screen capture shows a filter example that includes all assets in the EMEA domain that are either servers or workstations.


### Selection Criteria

Include Items that match ALL ▼ of the following


Address Group

and

- Address Group
- Asset fields
- Assigned Attributes
- Child Smart Rule

Selection Criteria 

Include Items that match ALL ▼ of the following

Asset fields 


Domain Name ▼

equals (=) ▼

EMEA ○

and

Include Items that match ANY ▼ of the following [remove group](#)

Asset fields 


Kind ▼

equals (=) ▼

Server ○

or

Include Items that match ALL ▼ of the following [remove group](#)

Asset fields 

Asset Name ▼

equals (=) ▼

Workstation ○

[Add another condition](#) [Add a new group](#)

## Smart Rule Filters

### Asset Smart Rule Filters

Address Group	Create a group of IP addresses.
Asset Fields	Group the Smart Rule by asset fields, such as, <b>Asset Name</b> , <b>Domain</b> or <b>DNS</b> , <b>Risk</b> , and <b>Kind</b> . You can include more than one asset field filter in the Smart Rule to refine the results.
Assigned Attributes	Create a filter based on an attribute.

	If the attribute is unassigned on a particular asset, you can choose to include or exclude the asset from the rule.
Child Smart Rule	<p>You can reuse a Smart Rule to save time when creating new Smart Rules. This is especially useful if the Smart Rule is a complicated set of filters.</p> <p>Reusing a Smart Rule further refines the assets that will be a part of the Smart Rule.</p>
Cloud Assets	Filter assets on the cloud connector.
Directory Query	Create an Active Directory or an LDAP query to include or exclude assets in the selected domain.
Installed Software	Filter on any combination of installed software.
Operating System	<p>Filter on any combination of OS. Operating systems included in the list are those detected in your network.</p> <p>Assets with no OS detected, can be included or excluded from the rule.</p>
Processes	Filter on any combination of processes.
Services	Filter by any combination of services.
Software Version	Filter by software version. The software that you can filter on is determined by the software that is discovered during the scan.
User Account Attribute	<p>Filters user accounts by SID or privilege. You can filter on both. If either value is not selected then it will be ignored.</p> <p>Using this filter you can determine if any users have administrator privileges that might no longer be required.</p> <p>You can create a Smart Rule using this filter and set the email alert action to notify you when a user account with admin privileges is detected.</p>
Windows Events	Filter by Windows events that are available in the Windows Event Viewer. For example, <b>Application</b> , <b>Security</b> , or <b>System</b> .
Workgroup	Filter by workgroup.



*For more information, please see the following:*

- ["Create an Address Group" on page 66](#)
- ["Create and Update Directory Queries" on page 70](#)

## Predefined Smart Group Categories

Agents and Scanners	Detects assets where BeyondInsight scanners are deployed.
Assets and Devices	Includes default Smart Groups for all assets and all assets labeled as workstations.
Intelligent Alerts	Includes Smart Groups that detect assets added since the previous day, and mobile assets with critical vulnerabilities. Intelligent Alerts are inactive by default.



Servers	Includes Smart Groups that detect mail server, web server, database server, domain controller, and SCADA assets. Only the <b>Web Servers</b> Smart Group is marked as active.
Virtualized Devices	Includes Smart Groups for virtual environments, including <b>Microsoft Hyper-V</b> and <b>Parallels</b> . Assets detected as virtual environments belong to these Smart Groups.  This default category also includes two Smart Groups: <b>Virtual Servers</b> and <b>Virtual Workstations</b> . Assets that are servers or workstations might not be detected, and as a result, not be included in the Smart Group. For example, the asset might be a router or unknown, resulting in exclusion from the Smart Group.



**Note:** *Virtual machine processing within Smart Rules has been deprecated as of BeyondInsight and Password Safe 24.1. For upgrades to the BeyondInsight and Password Safe 24.1 release, the **Virtualized Devices** category for Smart Rules still displays in the UI; however, any Smart Rules based on this category are marked as inactive. For upgrades to the 24.1 release, **Child Smart Rule** filters that use any of the following built-in rules are removed:*

- *Microsoft Hyper-V*
- *Parallels*
- *Recent Virtual Servers not in Password Safe*
- *Virtual Servers*
- *Virtual Workstations*
- *VMware vSphere*
- *Xen*

## Create Smart Rules

You can configure an asset-based Smart Rule to:

- Create Smart Groups
- Send email alerts with a list of assets
- Set attributes on assets
- Create a ticket with a list of assets
- Set scanner pooling

### Create an Asset Based Smart Rule

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Leave **Asset** selected for the **Smart Rule type** filter.
3. Click **Create Smart Rule**.
4. Select a category.
5. Enter a name and description.
6. By default, the Smart Rule is set to **Active (yes)**, so it is always available for processing. Disable the active setting to ensure the rule is not processed.
7. Select the filters in the **Selection Criteria** section.
8. From the **Actions** section, select one of the following:

Export Data	Select to manage a Smart Group for the BMC Remedy connector.
Mark each asset for deletion	Select to create a Smart Group that contains assets to be marked for deletion.
Mark each asset inactive	Assets detected as inactive are no longer be displayed on the <b>Assets</b> page or in reports.
Send an email Alert	Select and enter the email addresses for notification when the rule criteria is matched. Emails are only sent if the list of assets that match the rule is changed from the last time the rule was processed.
Set attributes on each asset	Select the attribute type from the list, and then select the attribute.
Set Scanner Properties	Select one or more scanners to lock to the Smart Group.
Set attributes on each asset	Select attributes for each asset.
Show asset as Smart Group	<p>When selected, the rule is displayed in the Smart Groups pane as a Smart Group. You can select the Smart Group to filter the list of assets in the Smart Groups pane.</p> <p>You can also select the default view to display on the <b>Assets</b> page when the Smart Group is selected.</p> <p>Smart Groups are also used for running scans and registering for patch updates.</p>

9. Click **Create Smart Rule**.



**Tip:** To view the contents of a Smart Rule when creating a new rule or editing an existing rule:

- Once the rule is saved, click **View Results**.
- You are taken to the associated grid, where the contents of the Smart Rule are listed.
- If the rule is actively processing, a banner displays letting you know that.



**Note:**

- **View Results** displays only if you have permissions to the grid corresponding to the Smart Rule, i.e.; Assets, Managed Accounts, Managed Systems.
- The Smart Rule must be saved with **Show <entity> as Smart Group** selected under **Actions** to view the results.



**Tip:** Because the Smart Rule must process to display the contents in the grid, we recommend viewing the results using only the **Show <entity> as Smart Group** action and before adding additional actions that may make changes to accounts and assets in your network.

Once you have confirmed the rule contains your desired items, you can then add additional actions to the Smart Rule.

## Smart Rule Processing

A Smart Rule processes and updates information in Smart Groups when certain actions occur, such as the following:

- The Smart Rule is created, or edited and saved.
- A timer expires.
- You manually kick off the processing by selecting the Smart Rule from the grid on the **Smart Rules** page, and then click **Process**.



**Note:** The **Process** action from the grid on the **Smart Rules** page does not apply to managed account and managed system Quick Group Smart Rules, because these only run once upon creation and cannot be triggered to run again.

- A Smart Rule with Smart Rule children triggers the children to run before the parent completes.
- Managed account Smart Rules with selection criteria **Dedicated Account** process when a change to a mapped group is detected. This can occur in the following scenarios:
  - A new user logs on.
  - The group refreshes in Active Directory by an administrator viewing or editing the group in **Configuration > Role Based Access > User Management**.

## Change the Processing Frequency for a Smart Rule

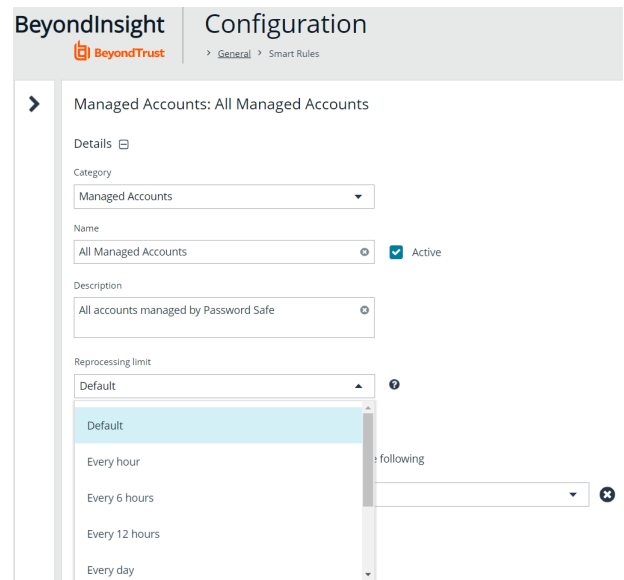
By default, Smart Rules process when asset changes are detected. The assets in the Smart Rule are then dynamically updated. For Smart Rules that require more intensive processing, you might want Smart Rules to process less frequently.

To provide more restrictive processing, you can select alternate frequency settings to override the default processing. The Smart Rules process in the selected time frame (for example, the rule processes once a week).

When creating a new Smart Rule or updating an existing one, select your desired frequency from the **Reprocessing limit** list in the **Details** section.



**Note:** A Smart Rule is always processed when first saved or updated.



The screenshot shows the 'BeyondTrust Configuration' interface. The breadcrumb trail is 'General > Smart Rules'. The main heading is 'Managed Accounts: All Managed Accounts'. Below this, there is a 'Details' section with a dropdown arrow. The 'Category' is set to 'Managed Accounts'. The 'Name' is 'All Managed Accounts' with an 'Active' checkbox checked. The 'Description' is 'All accounts managed by Password Safe'. The 'Reprocessing limit' dropdown is open, showing options: 'Default', 'Every hour', 'Every 6 hours', 'Every 12 hours', and 'Every day'. The 'Every hour' option is selected. To the right of the dropdown, there is a label ': following' and a small 'x' icon.

## Perform Other Smart Rule Actions

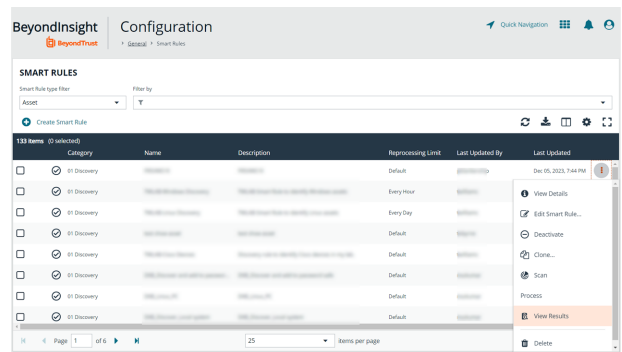
The below sections detail how to perform various actions with Smart Rules, such as:

- Viewing the results of processed Smart Rules from the grid
- Editing, cloning, deactivating, deleting, and auditing Smart Rules
- Configuring Smart Rules Options
- Viewing Smart Rules statistics

### View Results of a Smart Rule from the Grid

From the Smart Rules grid, you can view the results of any processed Smart Rule using the **View Results** row action, as follows:

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Click the vertical ellipsis to the right of the Smart Rule.
3. Select **View Results** to go to the associated grid where the contents of the Smart Rule are listed.

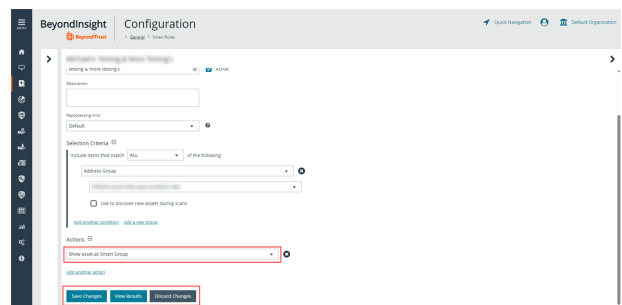


**Note:**

- **View Results** displays only if you have permissions to the grid corresponding to the Smart Rule, i.e.; Assets, Managed Accounts, Managed Systems.
- The Smart Rule must be saved with **Show <entity> as Smart Group** selected under **Actions** to view the results.

### Edit a Smart Rule

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Click the vertical ellipsis to the right of the Smart Rule.
3. Select **Edit Smart Rule**.
4. Make the necessary changes and then click **Save Changes**.





**Tip:** To view the contents of a Smart Rule when creating a new rule or editing an existing rule:

- Once the rule is saved, click **View Results**.
- You are taken to the associated grid, where the contents of the Smart Rule are listed.
- If the rule is actively processing, a banner displays letting you know that.



**Note:**

- **View Results** displays only if you have permissions to the grid corresponding to the Smart Rule, i.e.; Assets, Managed Accounts, Managed Systems.
- The Smart Rule must be saved with **Show <entity> as Smart Group** selected under **Actions** to view the results.



**Tip:** Because the Smart Rule must process to display the contents in the grid, we recommend viewing the results using only the **Show <entity> as Smart Group** action and before adding additional actions that may make changes to accounts and assets in your network.

Once you have confirmed the rule contains your desired items, you can then add additional actions to the Smart Rule.

## Clone a Smart Rule

You can clone custom or predefined Smart Rules.

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Click the vertical ellipsis button for the Smart Rule you wish to clone, and then select **Clone**.
3. If you are using the multi-tenant feature, select the organization from the list, and then click **Clone Smart Rule**.
4. Select the newly cloned Smart Rule from the grid, click the vertical ellipsis button, select **View Details**, and then edit the Smart Rule filters as needed.
5. Click **Save Changes**.



**Note:** Cloned Smart Rules have full (read/write) user group permissions.

## Deactivate a Smart Rule

You cannot delete predefined Smart Rules. However, if you have several smart groups, you can mark unused Smart Rules as inactive.



**Note:** A Smart Rule that is used in another Smart Rule cannot be deleted or marked as inactive.

An inactive Smart Group is no longer displayed in the Smart Group browser pane until marked active again.

To deactivate a Smart Rule:

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Select the Smart Group or multiple Smart Groups, and then click **Deactivate** above the grid.

## Delete a Smart Rule

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Select one or more Smart Rules.
3. Click the Trash Can icon above the grid. You can also click the vertical ellipsis to the right of a single Smart Rule and select **Delete**.



**Note:** Built in Smart Rules cannot be deleted. These are identified by the Lock icon.



**Note:** A Smart Rule that is used in another Smart Rule cannot be deleted or marked as inactive.

## Audit Smart Rules

To audit new or edited Smart Rules:

1. Go to **Configuration > General > User Audits**.
2. Select **Section** from the **Filter by** dropdown.
3. Select **Smart Rule** from the **Section** dropdown.
4. Click the information icon to the right of the Smart Rule.
  - If a Smart Rule is added, the **Add Details** pane displays with all added information.
  - If a Smart Rule is edited, the **Edit Details** pane displays with all edited information.

## Configure Smart Rule Options

From **Configuration > General > Smart Rule Options**, you can configure multi-worker node usage, the number of Smart Rule threads per type, and the failure thresholds using the **Smart Rule Omni Worker Options**.

**Multi-Node Processing** is turned off by default. Enable this to allow assignment of Smart Rules to process specific worker nodes. Choosing a worker node for a Smart Rule to process is accomplished by setting the **Target Processing to Workgroup** action on the Smart Rule in question. When enabled, this allows multiple Omni Workers to process Smart Rules.



### IMPORTANT!

For the following options to be available, you must enable **Multi-Node Processing**. An all Omni Worker restart is required to enable this processing.

- **Asset Threads:** (Default **5**) Choose a number of threads to use for processing asset based Smart Rules.
- **Managed Account Threads:** (Default **5**) Choose a number of threads to use for processing managed account based Smart Rules.
- **Managed System Threads:** (Default **5**) Choose a number of threads to use for processing managed system based Smart Rules.
- **Policy User Threads:** (Default **5**) Choose a number of threads to use for processing policy based Smart Rules.
- **Force Re-queued if stale:** (Default **12**) Choose a number of hours after which an unprocessed Smart Rule is considered stale and re-queued for processing.
- **Failure cool off threshold:** (Default **5**) Choose a number of times to let a Smart Rule process fail after which a cool-off period is observed.
- **Failure cool off skip time:** (Default **60**) Choose a number of minutes to wait before trying to process the Smart Rule again after reaching the failure cool off threshold.

Click **Update Smart Rule Omni Worker Options** when you have finished setting the options.

## Additional Multi-Node Processing Information

The **Multi-Node Processing** feature was added to allow more granular control over the performance of smart rule processing.

### SMART RULE OMNI WORKER OPTIONS

Configure multi-worker node usage, number of Smart Rule threads per type, and failure thresholds

Multi-Node Processing

Asset Threads

Between 1 and 20

Managed Account Threads

Between 1 and 20

Managed System Threads

Between 1 and 20

Policy User Threads

Between 1 and 20

Force Re-queued if stale

Between 1 and 40 (hours)

Failure cool off threshold

Between 3 and 10 (failures)

Failure cool off skip time

Between 20 and 200 (minutes)

UPDATE SMART RULE OMNI WORKER OPTIONS



## Impact of Multi-Node Processing

Multi-node processing is a combination of features:

- Controls the number of nodes and threads per node that are used for processing different types of Smart Rules.
- Restricts the processing of certain Smart Rules to specific nodes if required. This might come into play if the Smart Rule is built on a directory query that only one worker node has access to. Trying to process a Smart Rule like this across all Omni Workers would result in occasional failures if the node doing the processing lacks the necessary access to run the directory query.
- Controls certain behaviors in failure scenarios. The defaults should be sufficient, but are adjustable to give more control to support assisting customers in this area.
- When multi-node processing is turned off, then Smart Rule processing occurs on a single node using  $N$  threads, where  $N$  is configurable per Smart Rule **TYPE** in the configuration user interface (**Asset Threads**, **Managed Account Threads**, **Managed System Threads**, and **Policy User Threads**). While better than the historical single-threaded model, this can still be a lot of work for the Omni Worker and might cause poor performance in other areas (password rotations, event forwarding, etc.).
- When multi-node processing is turned on, then Smart Rule processing is shared across ALL worker nodes, using  $N$  threads per worker node, where  $N$  is configurable per Smart Rule **TYPE** in the configuration user interface (**Asset Threads**, **Managed Account Threads**, **Managed System Threads**, and **Policy User Threads**).
- The default setting for each Smart Rule type is 5 threads. The valid range is between 1 and 20 threads.
- Changes to the multi-node processing settings, as well as changes to thread counts and changes to failure scenario handling, can be made anytime but do not take effect until all Omni Worker services are restarted. This restart is a manual step. There is no risk to enabling or disabling these settings during production times, but you will not see any change in processing until Omni Worker services are restarted.

## Overall Best Practices

The **Multi-Node Processing** setting is turned off by default. Turning it on is beneficial if multiple worker nodes or Omni Workers are available, and if the existing Omni Workers are running at full capacity. If turning this feature on doesn't help Omni Worker performance, support should be contacted.

The lower the thread count, the less benefit you may get from turning this setting on. However, setting the thread count too high can also result in problems if your Omni Worker or worker nodes are not powerful enough to handle the load. Start with the default and adjust up or down as necessary.

## Reason for Multi-Node Processing

Before this feature was added, Smart Rule processing was only supported in a single-threaded model running in RemManagerService. Moving it to Omni Worker allows it to be multi-threaded on a single node. Adding the multi-node option allows Smart Rule processing to be scaled out even further.

## Multi-Node Processing Environment

This feature is used in an environment with multiple worker nodes or Omni Workers, where an Omni Worker is taxed by Smart Rule processing.

## Assign a Rule to a Node

If multi-node processing is turned on and a Smart Rule contains a specific criteria or action that only works if executed on a particular worker node, then that Smart Rule is expected to get an action of **Targeted to Workgroup** set. The Omni Worker or worker node that executes this Smart Rule should be manually set to the same work group under **Worker Nodes**. Some examples of criteria or actions that

only work on a particular node are directory queries that run on a specific network, or database account onboarding that runs on a specific network. Any network-specific Smart Rules are likely candidates to target a specific worker node.

## Troubleshooting Methods

- **Smart Rule Grid**

Three optional columns have been added to the Smart Rule grid to give some extra visibility into Smart Rule processing: **Processed Date** (checks to see if any rules were not processed recently), **Successful Attempts**, and **Failed Attempts**. Other columns that are helpful are **Reprocessing Limit**, **Average Time**, **Last Attempt**, and **Processing Status**.

- **Dynamic Dashboard**

Troubleshooting also includes checking the Omni Worker Dynamic dashboard in the user interface (administrators only). There you can see the Omni Worker agents, queued messages, messages sent to dead-letter (undeliverable letters, reached the limit of processing attempts), and messages actively being processed.

- **Health Dashboard**

This dashboard shows stats regarding issues on worker nodes, slowest Smart Rules, failed Smart Rules, and errors in the system.

- **Logfiles**

There is one log file per Omni Worker. Because this can be hard to read across environments, we have added the **System Event Viewer** and **System Event Settings** features. Enabling **System Event Database Recording** logs error or warning messages from across the system into the BeyondInsight database so they can be viewed and searched using the **System Event Viewer**. Purging these events from the database is configurable. The default is **5** days.

## Issues with Feature

The feature has been developed to avoid deadlocks, race conditions, memory leaks, etc., as part of our development and QA process. However, it is possible that some issues still exist. Contact BeyondTrust Support with any issues that arise for resolution.

## Changed Behaviors in the Database

On its own, multi-node processing does not make changes in the database. Any database changes to schemas, tables, views, procedures, etc., that are required for this and other features in BeyondInsight are made during an upgrade, whether this feature is enabled or not. If the **Enable System Event Database Recording** setting is turned on, then database entries are made for warnings or errors in the system. Purging is enabled for this data, and the time frame is configurable.

## Logged Nodes

Each Omni Worker has its own logs. Logging takes place across multiple nodes when this setting is turned on. The **System Event Viewer** shows any issues that are occurring.

## Failover Processing

Existing support for worker node or Omni Worker service failover also encompasses the Smart Rule processing function. In the event of a failover situation, the secondary node picks up where the primary node leaves off.

## View and Select Smart Rules Processing Statistics

The Smart Rules grid displays some processing statistics by default. Additional Smart Rules processing statistics, such as **Processed Date**, **Successful Attempts**, and **Failed Attempts** are available and can be displayed in the Smart Rules grid.

To add this information to the grid:

1. From the left menu in BeyondInsight, click **Smart Rules**.
2. Click the **Column chooser** icon in the upper right of the grid.
3. Click the desired column to add that information to the grid.
  - Check marks indicate columns currently displayed.
  - You can remove a displayed column by clicking the column name in the **Column chooser** list.
  - If there are more columns displayed than can fit in the width of the screen, a scroll bar appears at the bottom of the grid. It may be necessary to scroll sideways to view any additional columns.

## Add Credentials for Use in Scans

You can create the following credential types that can be used for scans:

- Microsoft SQL Server
- MySQL
- Oracle
- SNMPv2
- SSH
- Windows

To create a credential:

1. Select **Configuration > Discovery Management > Credentials**.
2. Click **Create New Credential**.
3. Enter a **Credential Name**.
4. Select a credential type from the **Type** list.



**Note:** The fields of information you need to enter change based on the type selection.

5. Enter the user account information appropriate for the type of credential you are creating:

Type	Information
MS SQL Server	<ul style="list-style-type: none"> <li>• Authentication Type</li> <li>• Domain (Optional)</li> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
MySQL	<ul style="list-style-type: none"> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
Oracle	<ul style="list-style-type: none"> <li>• Username</li> </ul>

	<ul style="list-style-type: none"> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Access level</li> <li>• Connect to</li> <li>• Protocol</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
MongoDB	<ul style="list-style-type: none"> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Database</li> <li>• Host</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
PostgreSQL	<ul style="list-style-type: none"> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Database</li> <li>• Host</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
Sybase	<ul style="list-style-type: none"> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Host</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
Teradata	<ul style="list-style-type: none"> <li>• Username</li> <li>• Password</li> </ul>

	<ul style="list-style-type: none"> <li>• Confirm password</li> <li>• Description</li> <li>• Host</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> </ul>
SNMPv2	<ul style="list-style-type: none"> <li>• Description</li> <li>• Key</li> <li>• Confirm key</li> <li>• Community string</li> </ul>
SSH	<ul style="list-style-type: none"> <li>• Authentication Type</li> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Port numbers</li> <li>• Key</li> <li>• Confirm key</li> <li>• Elevation</li> </ul>
Windows	<ul style="list-style-type: none"> <li>• Domain (Optional)</li> <li>• Username</li> <li>• Password</li> <li>• Confirm password</li> <li>• Description</li> <li>• Key</li> <li>• Confirm key</li> </ul>



**Note:** All credentials are stored in the database using an AES-256 block cipher by RijndaelManaged.



**Tip:** This feature propagates credentials stored in BeyondInsight to Discovery Scanner servers and allows end users and API calls to leverage credentials locally on the network scanner. This eliminates the need to provide credentials separately for those scanners.

*If the credential name matches an existing credential in the BeyondTrustDiscovery Scanner, the credential is overwritten with the value from BeyondInsight.*

6. Click **Create New Credential**.

To edit a credential, browse or **Search** for it in the list of **Credentials**, then click it. Enter the updated information and click **Update Credential**. Some credential information cannot be edited once the credential has been created.

**i** *If creating Oracle, SSH, or SNMP credentials, please see the following:*

- ["Create SSH Credentials" on page 94](#)
- ["Create Oracle Credentials" on page 92](#)
- ["Create SNMP Credentials" on page 93](#)

## Create Oracle Credentials

If you are scanning Oracle databases, you can create Oracle credentials. The **tnsnames.ora** file is updated automatically after you create an Oracle credential.

1. Navigate to **Configuration > Discovery Management > Credentials**.
2. Click **Create New Credential +**.
3. Enter a **Credential Name**.
4. From the **Type** list, select **Oracle**.
5. Provide a username and password, and confirm it.
6. Select an **Access level** from the list: **Standard**, **SYSDBA**, or **SYSOPER**.
7. Select additional connection options:
  - **Connect To:** Select **Database SID** or **Named Service**.
  - Enter the database SID or name of the service, depending on which option you had selected.
  - **Protocol:** Select **TCP**, **TCPS**, or **NMP**.
  - **Host:** Enter the host name where the Oracle database resides. If this credential is used for multiple Oracle hosts, separate each host name by a comma.



**Note:** IPv4 addresses, IP address ranges, CIDR notation, and named hosts are supported formats. Multiple SIDs, named services, TCP ports, and pipe names are not supported.

- **Port:** The default port is **1521**. Use the **+** and **-** buttons to change this if necessary.
8. Enter a key and confirm if those fields are available.



**Note:** The **Key** and **Confirm Key** fields display only when your administrator has enabled the global site setting to require access keys for discovery credentials: **Configuration > System > Site Options > Global Discovery Credential**.

9. Click **Create Credential**.

### Create New Credential

A number of credential types are supported and can be configured here.

Provide a unique credential name for this credential. The credential name cannot contain any of the following characters [ ] \$ & < + ? > \* | " : ; \ /

Credential Name

Type (optional)

Username

Password  
 Show

Confirm password  
 Show

Access level

Connect to

Database SID

Protocol

Host

Port  
 - +

Create Credential Discard



## Create SNMP Credentials

If scanning devices are managed by an SNMP community, you can add your community strings.

1. Navigate to **Configuration > Discovery Management > Credentials**.
2. Click **Create New Credential +**.
3. Enter a **Credential Name**.
4. From the **Type** list, select **SNMPv2**.
5. Enter a key and confirm it if those fields are available.




**Note:** The **Key** and **Confirm Key** fields display only when your administrator has enabled the global site setting to require access keys for discovery credentials: **Configuration > System > Site Options > Global Discovery Credential**.

6. Enter the **Community String**.
7. Click **Create Credential**.


## Create SSH Credentials

You can create Public Key Encryption credentials to connect to SSH-configured targets. You can select a credential that contains a public and private key pair used for SSH connections.

 **Note:** DSA and RSA key formats are supported.

Optionally, when configuring SSH, you can select to elevate the credential. Using **sudo**, you can access scan targets that are not configured to allow root accounts to log on remotely. You can log on as a normal user and use **sudo** to connect with a more privileged account. Additionally, you can use **sudo** to elevate the same account to get more permissions. Using **pbrun**, you can elevate the credential when working with Privilege Management for Unix & Linux target assets.

1. Navigate to **Configuration > Discovery Management > Credentials**.
2. Click **Create New Credential +**.
3. Enter a **Credential Name**.
4. From the **Type** list, select **SSH**.
5. Enter a **Username**.
6. Select an **Authentication Type**:
  - **Password:** Enter a password and confirm it.
  - **SSH-DSS Key:** Upload a private key file. Enter key and confirm it if those fields are available.

 **Note:** The **Key** and **Confirm Key** fields display only when your administrator has enabled the global site setting to require access keys for discovery credentials: **Configuration > System > Site Options > Global Discovery Credential**.

7. Enter a port number, or multiple port numbers separated by commas.
8. Elevating credentials is optional. To elevate credentials, select one of the following from the **Elevation** list:
  - **sudo:** The optional sudo username should be blank in most cases. When blank, commands run with the effective privileges of the root account. If an optional username is entered, sudo runs in the security context of that user.
  - **Enable:** Enter the credentials for Cisco devices. If you are auditing Cisco devices, you can elevate the credentials to privileged for more thorough scans.
  - **pbrun:** Enter the pbrunuser username.
9. Click **Create Credential**.

**Create New Credential**

A number of credential types are supported and can be configured here.

Provide a unique credential name for this credential. The credential name cannot contain any of the following characters [ ] ' \$ & < + ? > \* | " : ; \ /


Credential Name

Type (optional)

Username

Authentication Type

Upload private key file



Drag and drop or click to select a file to upload.

All file types accepted.  
Maximum File Size: 100 KB

Port numbers  
Enter up to 250 ports separated by commas. (e.g. 80, 100, 44, 1433)

Key

Confirm key

Elevation

## Run Discovery Scans

Run a discovery scan to locate network assets, such as workstations, routers, laptops, and printers. A discovery scan also determines if an IP address is active. You can periodically repeat discovery scans to verify the status of devices, programs, and the delta between the current and previous scans.



**Note:** *Discovered assets do not count toward your license.*

- The TCP discovery ports are 22, 80, 110, 139, 389, 443, 445, 1025, 1433, 1521, 3306, 3389, 5000, 5432, and 27017.
- Use more than one scanner to distribute the coverage across the network.

## Use the Scan Wizard to Create a Discovery Scan

1. From the left menu, click **Run a New Discovery Scan**.
2. **Select Scan Type:** There are three types of scans to choose from. Select one and click **Next**.
  - **Discover Local Accounts:** This scan requires credentials and deploys a local scan service to the scan targets. This scan discovers systems as well as the local user accounts located on them.
  - **Detailed Discovery Scan:** This scan requires credentials and it deploys a local scan agent to the scan targets, which can be disabled if required. Besides systems, this scan provides associated information on services, scheduled tasks, users, and databases. This scan is customizable. Click **Customized Detailed Discovery** to select the type of data to collect.
  - **IP Discovery:** This scan does not use credentials for the scanning process and does not deploy any services to the scan targets. This scan discovers only the IP addresses for detected systems.



**Note:** *Any assets discovered using the **IP Discovery** scan, if subsequently rescanned with another scan type, are listed in BeyondInsight as duplicates. This type of scan can only identify assets by IP address, while credentialed scans rely on a mix of hostname, DNS name, and workgroup to identify assets.*

3. **Select Scan Targets:** Enter scan targets in the field provided. You can enter single IP addresses, IP ranges, addresses in CIDR notation, or named hosts. Items must be separated by commas.
4. **Choose Scan Agent:** Select which agents are used to execute the scan. If more than one agent is selected, the scan targets are split between the selected agents. If you have a large number of agents, you can use the filter dropdown to specify filter criteria. Click **Next** to continue.




**Note:** *A warning banner appears at the top of the screen if your installation includes any Discovery Agents earlier than version 20.1. These must be updated by the end of 2021. You can identify outdated agents by referring to the grid of agents on this screen, which includes the version of each agent.*


*Click **Dismiss** to hide the warning banner until your next login. Dismissing the warning banner here does not hide it on the dashboard, and dismissing the warning banner on the dashboard does not hide it on this screen.*


5. **Enter Credentials:** If the type of scan you select requires credentials, you can select a credential from the **Credential List**, and/or use the **Custom Credential** section to provide a credential to use for this scan.


- If you enter a **Custom Credential**, click **Test Credential** to verify its functionality.

 **Note:** Clicking **Test Credential** tests only AD domain user accounts. It is not for use with local or SSH user accounts.

- If using the **Credential List**, select one or more credentials from a list of available credentials.
- If keys are required for discovery credentials in your environment, either provide a key for each credential or enable the **Use the same key for all selected credentials** option to provide a **Universal Configuration Key** used for all selected credentials.

 **Note:** Configuration keys are not used or validated for Password Safe credentials.

 **Tip:** Use the **Search Credentials** box to filter the list of available credentials.

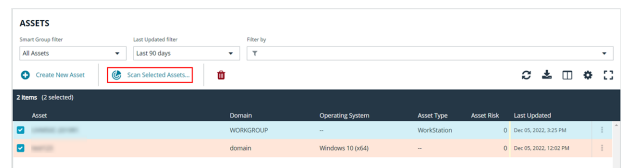
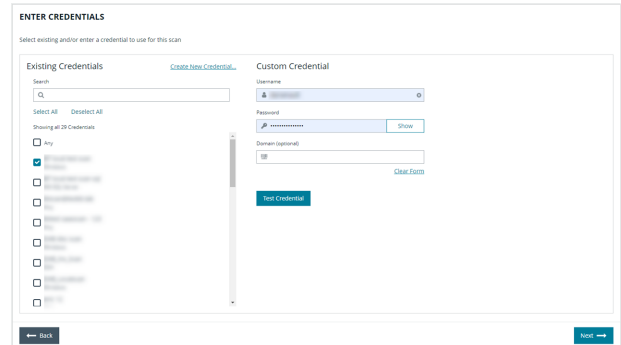
 **Tip:** If you require a credential that isn't listed, click the **Create New Credential** link at the top of the list of credentials to open the **Create New Credential** form and create a new credential. The new credential is added to the list of existing credentials.

6. Once credentials have been selected for the scan, click **Next**.
7. **Name the Scan:** Provide a unique name for this scan. The scan name cannot be longer than 58 characters and cannot contain any of the following characters: [ ] ' \$ & < + ? \* | " : ; \ / . You can also set the following options:
  - Apply job restrictions that allow you to abort the scan if it runs longer than a set number of minutes (max 48 hours).
  - Set a schedule, which can be **Immediate**, **One Time**, or **Recurring**.
8. Click **Finish** to complete the Scan Wizard.

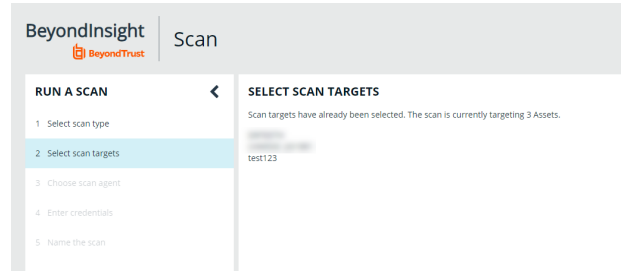
## Run Scans from a List of Assets

If you want to run a scan but would prefer to select targets from a list of assets rather than type them, click **Assets** from the left menu.

From the **Assets** grid, select the assets you want to scan, and then click **Scan Selected Assets**.

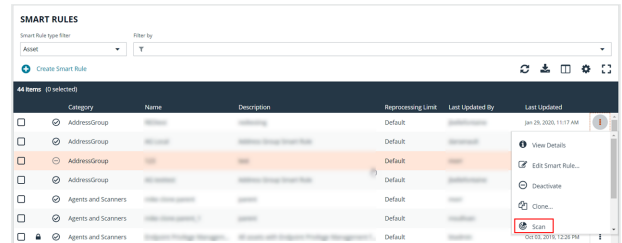


The Scan Wizard screen appears. Here you can select the type of scan to run. The difference is that when you click **Next** and go to the **Select Scan Targets** page, you will find the targets already selected. The next steps in the Scan Wizard are the same as those outlined above.



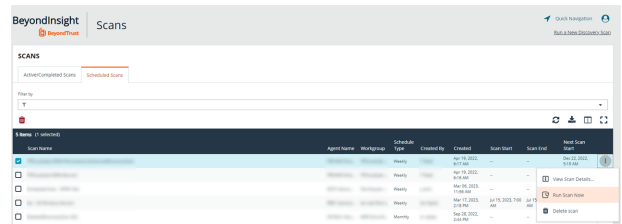
## Use Smart Rules as Targets for Scans

You can also run a scan on Smart Rules. From the **Smart Rules** grid, select a rule, click the vertical ellipsis for the rule, and then select **Scan**. You are taken to the Scan Wizard, for which the targets are preselected, and if the Smart Rule is configured to use specific scanners, the scan agents are also preselected. The next steps in the Scan Wizard are the same as those outlined above.



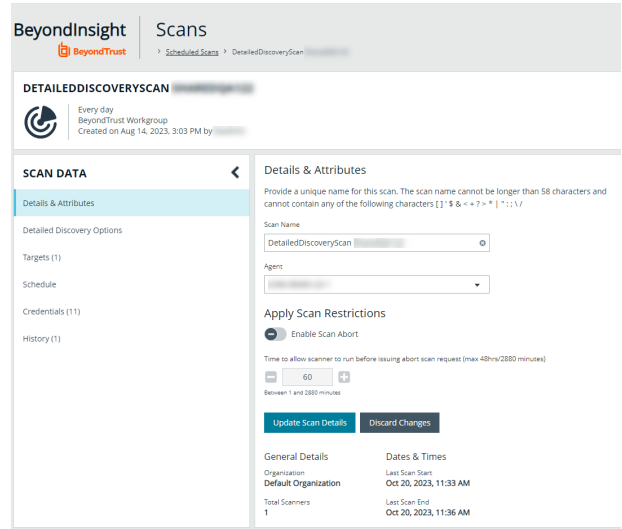
## Check Completed and Scheduled Scans

To check information on scans, click **Active/Completed Scans** or **Scheduled Scans** from the left menu in the console. From the **Scans** page you can see active, completed, and scheduled scans, and you can delete a scan. You can also see the scan status for each active or completed scan. For each active and completed scan you can click the vertical ellipsis for the scan, and then select **Run Scan Now** or **Delete scan**. For each scheduled scan you can click the vertical ellipsis for the scan, and then select **View Scan Details**, **Run Scan Now**, or **Delete scan**.



When viewing the **Scan Data**, you can:

- Change the name of the scan.
- Change the scanner agent associated with a scheduled scan job.
- Apply job restrictions that allow you to abort the scan if it runs longer than a set number of minutes (max 48 hours).
- Change the scan details, such as the accounts, services, databases, and software selected for discovery.
- View the scan targets and modify the target Smart Rule if one is selected.
- Change the schedule type and frequency for the job.
- Change the credentials used to run the scan.
- View the history of the scan, if any exists.



## Discover Assets Using a Smart Group

When the Smart Group filter is an address group, Active Directory query, or cloud connector, you can discover assets. When the **Use to discover new** box is checked, any assets online since the Smart Group was last processed are detected. The scan results on the **Assets** page reflect the number of assets found.

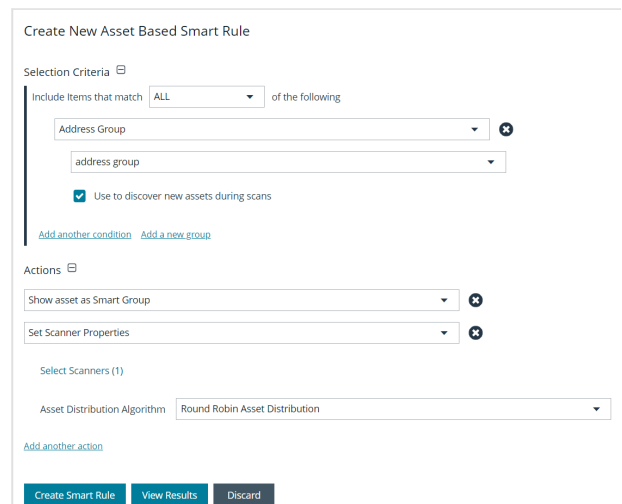


*Tip: If you create an address group that includes the /19 CIDR block, the range possesses 8190 potential assets. The Discovery Scan always tries to discover those assets. Keep this in mind when you are reviewing scan results.*

## Key Steps

To create a Smart Group, go to **Configuration > General > Smart Rules > Create Smart Rule**.

- Create an address group or Active Directory query that includes the IP address range or domain.
- Create a Smart Group that includes the address group or query as the filter. Enable the **Use to discover new assets during scans** option.
- You can also configure the Smart Rule to use specific scanners by selecting the **Set Scanner Properties** action, and then selecting specific scan agents from the list.





**Tip:** We recommend you run a discovery scan at a regular interval. You can discover assets manually by entering a host name, IP address, or address range.



For more information, please see the following:

- ["Create and Update Directory Queries" on page 70](#)
- ["Create an Address Group" on page 66](#)

## Manage Scan Jobs

From the **Scans** page, you can perform the following:

- View active, completed, and scheduled scans
- Locate specific scans by using the date, status, agent name, workgroup, scan name, start time, and end time filters
- Use the row actions available from the vertical ellipsis menu for a scan to perform the following:
  - Open the discovery report for a completed scan
  - Stop active scans that are currently running
  - View and edit details for scheduled scans
  - Run completed and scheduled scans now
  - Deactivate scheduled scans
  - Reactivate inactive scans




**Note:** You can view inactive scans by selecting **Inactive** from the **Status filter** above the grid. You can still run inactive scheduled scans and completed scans that are linked to inactive scheduled scans by clicking the vertical ellipsis for the scan and selecting **Run Scan Now**. You can also reactivate inactive scans from the vertical ellipsis menu if desired.



## Manage Assets

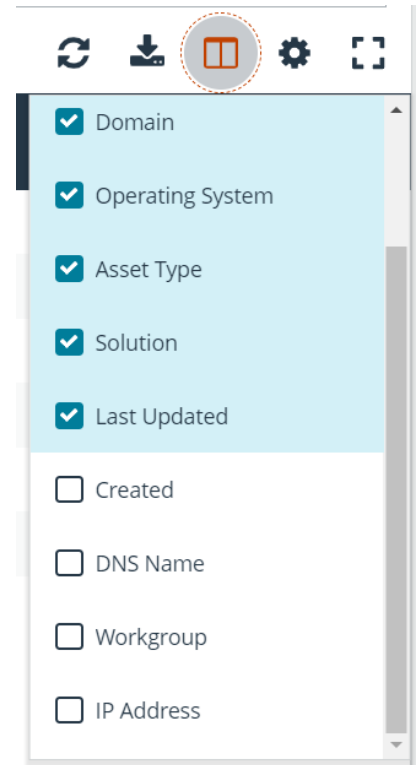
The **Assets** page allows you to review details about your assets quickly by filtering your assets by last update time, type of asset, domain, operating system, technical solutions applied to the asset (for example, an asset is a scanned host or database host), DNS name, Workgroup, and IP address.

 **Note:** To maintain a manageable database size, assets that have only been discovered once in the past 90 days are purged, and asset attributes are purged every 30 days. We recommend running discovery scans at least every 30 days to refresh asset data.


Go to **Configuration > System > Data Retention** to manage BeyondInsight's data retention settings.

For more information, please see [Set Data Retention and Advanced Purging Options at https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/user/options/data-retention.htm](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/user/options/data-retention.htm).

You can modify which columns to display in the **Assets** grid by clicking the **Column Chooser** icon above the grid. From here you can add or remove columns.



## Review Asset Details

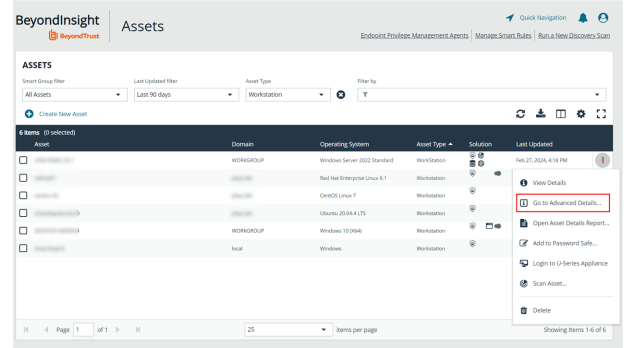
 **Tip:** Depending on the scan settings, information might not be detected and included in the scan results. If the following scan settings are turned on, more accurate scan results can be expected:

- **Perform Local Scanning**
- **Enable WMI Service**



- **Enable Remote Registry Service**

You can review the advanced details information for assets by clicking the vertical ellipsis button for an asset, and then selecting **Go to Advanced Details**.



## General Data

- **Details & Attributes:** Displays details about the asset such as: IP address, DNS name, domain, system name, Workgroup, date the asset was added and updated, the operation system, etc.
- **Accounts:** If the asset is linked to a managed system, the managed accounts on that system are listed in the grid.



**Tip:** Click the **View Managed System** link above the grid to view the advanced details for the managed system that is linked to the asset. To return to the advanced details for the asset, click the **View Asset** link.

- **IIS Application Pools:** Displays IIS Application Pools discovered on the asset on the last successful scan of the system.
- **Databases:** Displays the databases that are on the asset and allows you to add a database.
- **Smart Groups:** Displays the Smart Groups that the asset is associated with.

## Scan Data



**Note:** By default, the current snapshot of scan data is selected. You can select other available snapshots to load the data for that date. Scan snapshots are purged from the database every 90 days.

- **Ports:** Displays the open port number, protocol, and description.
- **Scheduled Tasks:** Displays information about scheduled tasks for a particular asset, including task name, task to run, last time the task ran, schedule type, etc.
- **Services:** Displays discovered services, including name, description, state, logon details, startup type, and dependencies.
- **Software:** Lists all software discovered on the asset, including version.
- **Users:** Includes several attributes for user accounts, including: name, privileges, password age, last logon date, password expiry status, group membership, and status of the account, and allows you to filter by these attributes.

## Create Assets Manually

Assets are added to BeyondInsight through discovery scans. Assets can also be manually added from the **Assets** page, as follows:

1. From the **Assets** page, select **All Assets** from the **Smart Group filter** dropdown.
2. Click **+ Create New Asset**.
3. Complete the **Create Asset** form, and then click **Create Asset**.



**Note:** New assets created in any Smart Group other than **All Assets** might not appear under the selected Smart Group if the Smart Rule criteria is not met or until the Smart Rule processes. We recommend that you create new assets using the **All Assets** Smart Group.



**Note:** A manually added asset can have its basic information edited, such as Name, DNS Name, Domain, Asset Type, IP Address,, and Workgroup. Asset attributes cannot be edited at the individual asset level at this time. If this is necessary, Smart Rules can be used to modify the attributes associated with an asset.

## Delete Assets

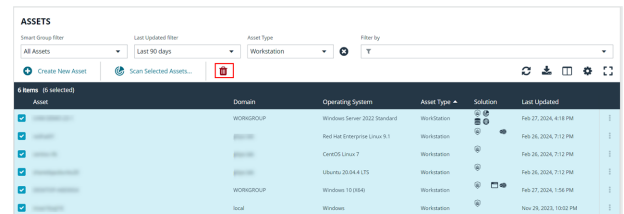
You can remove assets from the **Assets** grid immediately. Assets removed from the grid are deleted from the BeyondInsight database during the nightly data purge.

1. From the **Assets** page, select an asset or multiple assets.



**Tip:** You can use the filters above the grid to narrow down your list of assets to those targeted for deletion, and then press **ctrl + A** to select all assets in the grid to delete at once.

2. Click the **Delete** button above the grid.
3. Click **Delete** on the confirm deletion message.



Asset	Domain	Operating System	Asset Type	Solution	Last Updated
Asset 1	WORKGROUP	Windows Server 2022 Standard	Workstation		Feb 27, 2024, 4:19 PM
Asset 2	WORKGROUP	Red Hat Enterprise Linux 9.1	Workstation		Feb 26, 2024, 7:12 PM
Asset 3	WORKGROUP	CentOS Linux 7	Workstation		Feb 26, 2024, 7:12 PM
Asset 4	WORKGROUP	Ubuntu 20.04.4 LTS	Workstation		Feb 26, 2024, 7:12 PM
Asset 5	WORKGROUP	Windows 11 1804	Workstation		Feb 27, 2024, 1:56 PM
Asset 6	local	Windows	Workstation		Nov 29, 2023, 10:02 PM



For more information on discovering assets using a discovery scan, please see: ["Run Discovery Scans" on page 95.](#)

# Log in to U-Series Appliance from the BeyondInsight Console

Users with sufficient permissions have the option to log in to the U-Series Appliance directly from the **Assets** grid in BeyondInsight. This eliminates the need for organizations to share their BTAdmin account. This feature also leverages BeyondInsight user audits to audit which user is logged in to which appliance when the login is initiated from the BeyondInsight **Assets** grid.

## Prerequisites

- BeyondInsight 22.2, Discovery Scanner 22.2, and U-Series Management Software 3.5, or later releases for each of these, must be installed and configured.
- An API key exchange must be performed between the BeyondInsight console appliance and the remote appliances.
  - SQL Free appliances that have already exchanged must be repeated.
- The crypto key must be exchanged for the BeyondInsight database. Use one database for all your appliances.
- A working DNS lookup for each appliance is required (IP addresses not supported).



*For more information on API keys and crypto keys, please see the following:*

- [Manage the U-Series Appliance API Key at https://www.beyondtrust.com/docs/beyondinsight-password-safe/appliance/administration/security.htm](https://www.beyondtrust.com/docs/beyondinsight-password-safe/appliance/administration/security.htm)
- [Manage U-Series Appliance Security Settings at https://www.beyondtrust.com/docs/beyondinsight-password-safe/appliance/administration/security.htm](https://www.beyondtrust.com/docs/beyondinsight-password-safe/appliance/administration/security.htm)
- [Configure U-Series Appliance Roles at https://www.beyondtrust.com/docs/beyondinsight-password-safe/appliance/administration/configure-roles.htm](https://www.beyondtrust.com/docs/beyondinsight-password-safe/appliance/administration/configure-roles.htm)

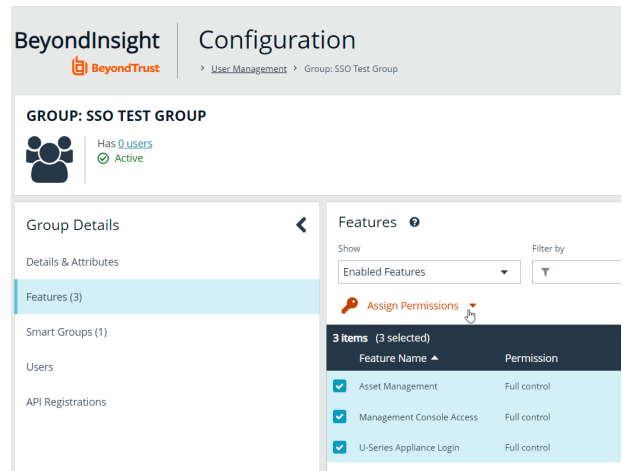
## Setup Non-Admin Users in BeyondInsight

Non-admin users must be given permissions to view and log in to the U-Series Appliance. This is done by assigning permissions to a single sign on user group in BeyondInsight.

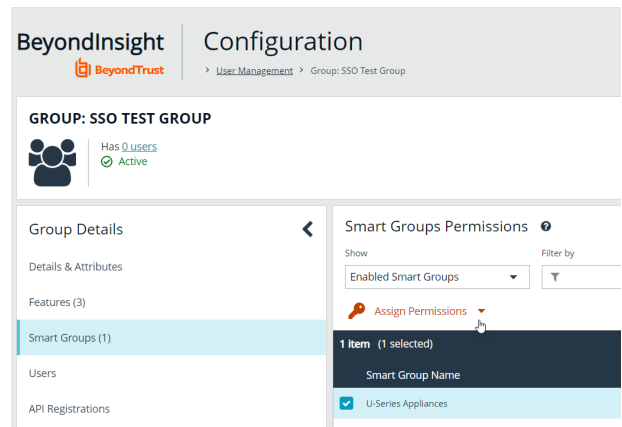
### Create User Group, Assign Permissions, and Add Users

1. In the BeyondInsight console, go to **Configuration > Role Based Access > User Management > Groups**.
2. Click **Create New Group**.
3. Enter **Group Name** and **Description** and click **Create Group**. This opens the **Group Details** page.

4. From **Group Details** pane, click **Features**, and select the following features:
  - **Asset Management** to view appliances you have access to on the **Assets** page .
  - **Management Console Access** for access to the BeyondInsight console.
  - **U-Series Appliance Login** for permissions to log in to the appliance from the BeyondInsight console.
5. Click **Assign Permissions** above the grid, and select **Assign Permissions Full Control**.
6. From **Group Details** pane, click **Smart Groups**. Select the **U-Series Appliances** Smart Group.
7. Click **Assign Permissions** above the grid, and then select **Assign Permissions Full Control**.



8. From **Group Details** pane, click **Users** and search for the users you wish to add to the group.
9. Select the users and click **Assign User** above the grid.



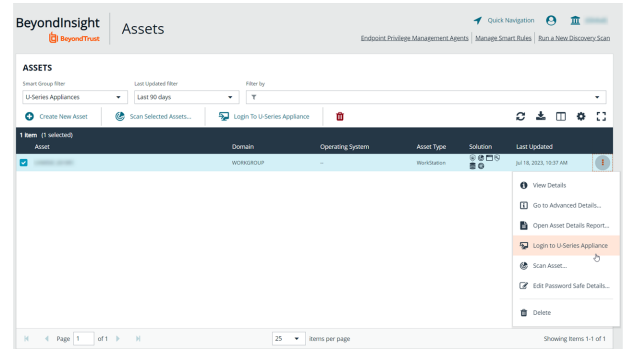
## Log in to the U-Series Appliance from BeyondInsight

Once users have been added to the group, they can log into BeyondInsight and access limited features. Users can click **Assets** to view the assets to which they have been assigned permissions to access.



To log into a listed U-Series Appliance from the **Assets** page:

1. Select **U-Series Appliances** from the **Smart Group** filter dropdown.
2. Select the asset.
3. Click **Login To U-Series Appliance** above the grid, or click the vertical ellipsis to the left of the asset, and then select **Login to U-Series Appliance**.



**Note:** Users that are assigned permissions to the **U-Series Appliance Login** feature are authenticated into the appliance with admin privileges.



For more information on creating a new user, please see [Create and Manage User Accounts](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/user/role-based-access/user-accounts.htm) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/user/role-based-access/user-accounts.htm>.

## Run Scans on Cloud Platforms in BeyondInsight

You can run scans on the following cloud types: Amazon EC2, Rackspace, IBM SmartCloud, Microsoft Azure, Microsoft Hyper-V, and Google Cloud.

Before you create a cloud connector, ensure the following requirements are in place.

### Amazon EC2 Requirements

To use the Amazon EC2 connector, you must adhere to the following recommendation from Amazon:

- User accounts must have minimal permissions assigned (for example, describe instances).

The following minimum permissions are required to successfully enumerate a list of targets and run a scan:

- elasticloadbalancing:DescribeLoadBalancers
- ec2:DescribeInstances
- ec2:DescribeInstancesTypes
- ec2:DescribeInstanceTypeOfferings
- ec2:DescribeRegions
- ec2:DescribeInstanceStatus
- ec2:DescribeImages

### Azure Requirements

The Azure connector extracts virtual machines and load balancers from Resource Manager. You must create an Entra ID application.

You can either use the premade **Reader** role, or set up a new **Virtual Machine Contributor** role to the **Azure Resource Group**. You must choose where in the Azure hierarchy you are giving access — either as high as the subscription, or for a specific Resource Group. If you choose to set up a new role, the minimum permissions that must be granted are:

- Microsoft.Resources/subscriptions/resourceGroups/read
- Microsoft.Compute/virtualMachines/read
- Microsoft.Compute/virtualMachines/instanceView/read
- Microsoft.Network/loadBalancers/read
- Microsoft.Network/loadBalancers/frontendIPConfigurations/read
- Microsoft.Network/networkInterfaces/read
- Microsoft.Network/networkInterfaces/loadBalancers/read
- Microsoft.Network/publicIPAddresses/read



For detailed instructions, please see [Create an Entra ID Application](https://learn.microsoft.com/en-us/entra/identity-platform/howto-create-service-principal-portal) at <https://learn.microsoft.com/en-us/entra/identity-platform/howto-create-service-principal-portal>.

## Google Cloud Requirements

- **Key file:** You must download a key file from the Google cloud instance. The key file is uploaded when you create the connector in BeyondInsight.



**Note:** The key file is not required if your BeyondInsight server is hosted on your Google cloud instance.

- **Compute Engine Network Viewer Role:** The BeyondInsight service account that you create in the Google cloud instance requires the **Compute Engine Network Viewer** role.



For more information, please see [Compute Engine IAM Roles](https://cloud.google.com/compute/docs/access/iam) at <https://cloud.google.com/compute/docs/access/iam>.

## Hyper-V Requirements



**Note:** The steps required for successful authentication vary depending on your environment. These instructions are to connect a Hyper-Vi virtual machine on the CIMV2 namespace off root (not connecting to a Hyper-V server).

## Set Firewall

1. Open Windows Firewall (**Start > Control Panel > Security > Windows Firewall**).
2. Select **Allow a program or feature through Windows Firewall**.
3. Check the Windows Management Instrumentation (WMI) box, and then check the **Public** box.
4. At this point you can send requests but receive unauthorized exceptions, whereas previously the host would not be found.

## Add WMI user to COM Security

1. Start **Component Services** (using the **Run** command, enter **dcomcnfg.exe**).
2. Expand **Component Services > Computers**.
3. Right-click **My Computer**, and then select **Properties**.
4. Select the **COM Security** tab, and then in **Access Permissions**, click **Edit Limits**.
5. Add the username you are using for WMI, and then select **Local Access** and **Remote Access**.
6. Click **OK**.
7. In **Launch and Activation Permissions**, click **Edit Limits**.
8. Add the WMI user, and then select **Remote Launch** and **Remote Activation**.

## Change WMI Permissions

1. Start the **Computer Management** snap-in by using the **Run** command, and entering **compmgmt.msc**.
2. Expand **Services and Applications**.



3. Right-click **WMI Control**, and then select **Properties**.
4. Click the **Security** tab.
5. Select **Root\CIMV2**, and then click **Security**.
6. Add the user, and then click **Advanced**.
7. Double-click the user, and then check the following boxes: **Enable Account**, **Remote Enable**, and **Read Security**.
8. From the **Apply to** list, select **This namespace and subnamespaces**.
9. Restart the **WMI** service.

## Test Connection

Use **WBEMTest** on the local machine (not your Hyper-V server) to test your connection.

1. Run **wbemtest.exe** from the command prompt.
2. Click **Connect**.
3. Enter the namespace in the format **\\HOST\root\CIMV2**, where **HOST** is a computer name on a domain or an IP address.
4. Enter a username and password.
5. Click **Connect**.

## Configure a Cloud Connector

1. In the BeyondInsight console, go to **Configuration > General > Connectors**.
2. In the **Connectors** pane, click **Create New Connector**.
3. Provide a name for the connector, and then select a **Connector Type** from the list:
  - **AWS Scan Target Collector**
  - **Azure Scan Target Collector**
  - **Google Cloud Scan Target Collector**
  - **Hyper-V Scan Target Collector**
  - **Rackspace Scan Target Collector**
4. Click **Create Connector**.
5. Enter the connector information in the right pane:
  - For AWS cloud connections, required fields are: **Region**, **Access Key ID**, and **Secret Access Key ID**.  
Instances associated with the region are displayed in the **Connection Test Results** section.
  - For Azure, required fields are: **Region**, **Client ID**, **Client Server**, **Tenant ID**, and **Subscription ID**.
  - For Google Cloud, required fields are **Server** (the region), **Project Name** (the project ID), and the **Key File**. Upload the key that you downloaded from the Google Cloud.
  - Hyper-V server, required fields are: **Server** (IP address), **Username**, and **Password**.
  - For Rackspace, required fields are **Account Type**, **Username**, and **API Key**.
6. After you configure the connector, click **Test Connector** to ensure the connector works.
7. Click **Create Connector**.

After you create a cloud connector, you can run a scan and review the results to determine what cloud assets were discovered..

## Cloud Connector Smart Groups

You can create Smart Groups based on the cloud connectors that you are using.

1. From the left menu, click **Smart Rules**.
2. Click **Create Smart Rule**.
3. Select a category, and then enter a name and description.
4. Under **Selection Criteria**, select **Cloud Assets**, and then select the cloud connector type to filter on (**AWS, Azure, Hyper-V**).
5. For AWS, click **Select AWS Instance Types** to pick specific instance types.
6. For AWS, Azure, and Google, check the **Use Private IP Address** box to scan internal IP addresses.
7. Under **Actions**, select **Show asset as Smart Group**.
8. Click **Create Smart Rule**.
9. Run a discovery scan on the smart group to see the cloud assets in reports.
10. On the **Assets** page, select the cloud connector, and then click the vertical ellipsis button to review the details.

## Configure BeyondInsight AWS Connector

This section provides information on setting up an Amazon AWS connector, including details on the AWS configuration.

### Set up a Policy

1. Log in to the **AWS Management Console**.
2. Select **Identity & Access Management**.
3. Select **Policies** from the **Details** menu.
4. Select **Create Policy**.
5. Select **Create Your Own Policy**.
6. Enter a policy name and description.
7. Paste the following JSON into **Policy Document**:

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Effect": "Allow",
      "Action": [
        "elasticloadbalancing:DescribeLoadBalancers",
        "ec2:DescribeInstances",
        "ec2:DescribeRegions",
        "ec2:DescribeInstanceStatus",
        "ec2:DescribeImages"
      ],
      "Resource": "*"
    }
  ]
}
```



**Note:** For "**Resource**": "\*", you must determine what JSON is required for your current needs. You may also need a condition with this, such as if you want only the `dev` group to have access to certain instances.

## Grant Access to a Third Party (Optional)



**Note:** The **ARN** and **External Name** fields are for granting access to a third party. For more information, please see [How to Use an External ID When Granting Access to Your AWS Resources to a Third Party](https://docs.aws.amazon.com/IAM/latest/UserGuide/id_roles_create_for-user_externalid.html) at [https://docs.aws.amazon.com/IAM/latest/UserGuide/id\\_roles\\_create\\_for-user\\_externalid.html](https://docs.aws.amazon.com/IAM/latest/UserGuide/id_roles_create_for-user_externalid.html).

After you configure the AWS settings, you can create the AWS Scan Target Collector connector and Smart Group in the BeyondInsight console.



**Note:** When creating, editing, or viewing the connector, the **Cloud Scan Targets** grid only shows results immediately after a test is completed. The targets are not automatically loaded into the BeyondInsight UI each time the connector is viewed or edited.

# Work with the Multi-Tenant Feature (Organizations) in BeyondInsight

The multi-tenant feature in BeyondInsight allows you to define multiple organizations (or tenants) where each organization's asset data is kept isolated from all other organizations. Only Smart Rules marked as **Global** can combine asset data across multiple organizations.

Most BeyondInsight features are available with multi-tenant, including Smart Rules and connectors.

Features not available include exclusions, tickets, and report templates.

## Use the Organization Drop-down Filter

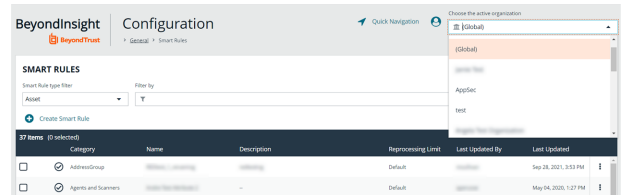
When working with more than one customer, use the **Organization** drop-down filter to see assets and Discovery Scanner agents associated only with a particular customer.

The **Organization** drop-down filter is displayed only if more than one active organization is available to the currently logged-on user.

Many pages in the console are organization-aware and reflect the organization chosen in your profile. However, other pages may still require you to select an organization on that page. If there is no saved value for the organization in your profile, the **Global** organization is default.

## Select Organization (Tenant) on the Smart Rules Page

All of the pre-packaged Smart Rules are part of the Global Rules. When a pre-packaged Smart Rule is turned on, the Smart Rule applies to all assets in every organization. You can use the **Organization** dropdown located at the top right corner of the page header, next to the **Profile and preferences** icon, to easily switch the Smart Rules displayed in the grid from the **Global** rules to rules for specific tenants.



**Note:** When you initially create an organization, both the default and the new organization is provisioned with the **All Assets Smart Rule**. Also, all active built-in Smart Rules are copied from the default organization to the new organization; inactive built-in Smart Rules are not copied from the default to the new organization. Once you change the organization, you can create Smart Rules as usual.



For more information, please see "[Use Smart Rules to Organize Assets](#)" on page 74.

## Select an Organization in Quick Rules

When you create a quick rule from the **Address Group**, you can select the organization.

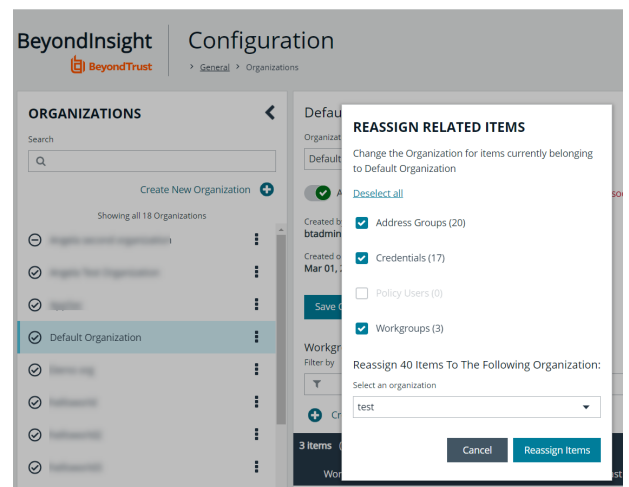
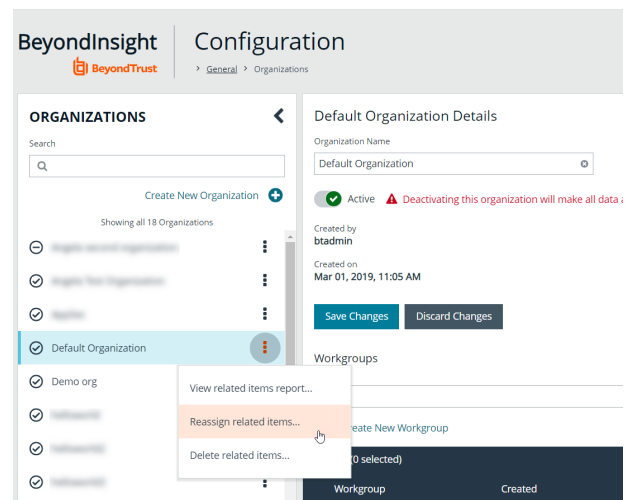
## Select an Organization for Address Groups

You can organize address groups by organization. When working in the **Address Groups** configuration area, you can select an organization and see the address groups specific to that organization.

## Move Items to a Different Organization

To migrate existing organization-aware items to a different organization:

1. In the BeyondInsight console, go to **Configuration > General > Organizations**.
2. From the **Organizations** pane, click the vertical ellipsis for the organization for which you wish to migrate items, and then select **Reassign related items**.
3. Check the items you wish to migrate:
  - **Address Groups**
  - **Credentials**
  - **Policy Users**
  - **Workgroups**
4. From the **Select an organization** dropdown, select the organization you wish to migrate the items to.
5. Click **Reassign Items**.



## Select a Workgroup for Unknown (Not Scanned) Assets

For unknown assets (assets not scanned by BeyondInsight), you must select a workgroup associated with the organization. Assets might be unknown when using the settings:

- **Single IP address**
- **IP range**

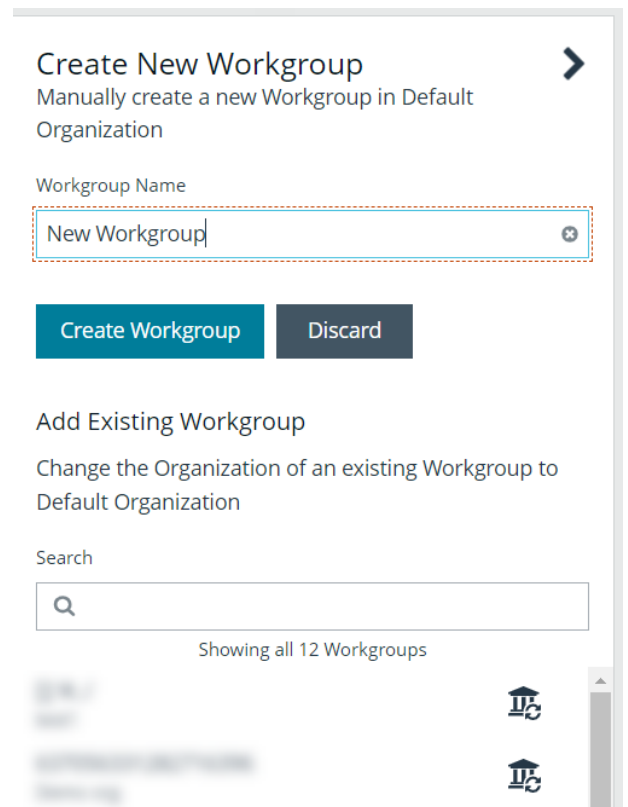
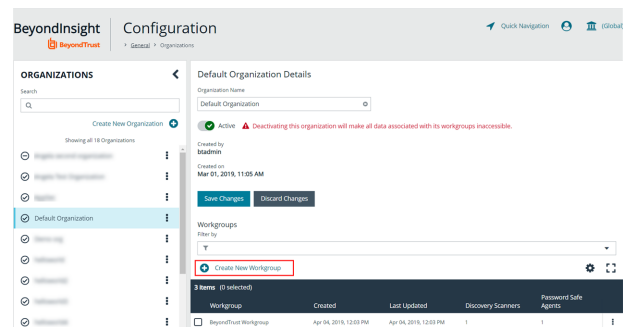
- CIDR notation
- Named hosts

For known assets (assets detected and in the BeyondInsight database), a workgroup does not need to be selected. The assets are already associated with a workgroup. Assets are known when using the following settings:

- **Currently selected Smart Group**
- **Currently selected Assets**

## Create a New Workgroup

1. In the BeyondInsight console, go to **Configuration > General > Organizations**.
2. From the details pane for an organization, under **Workgroups**, click **Create New Workgroup**.
3. In the **Create New Workgroup** pane, enter a **Workgroup Name**, and then click **Create Workgroup**.



## Set Up Organizations

### Create a Workgroup for the Discovery Scanner

The **Users Accounts Management** feature is required to assign workgroups to an organization.

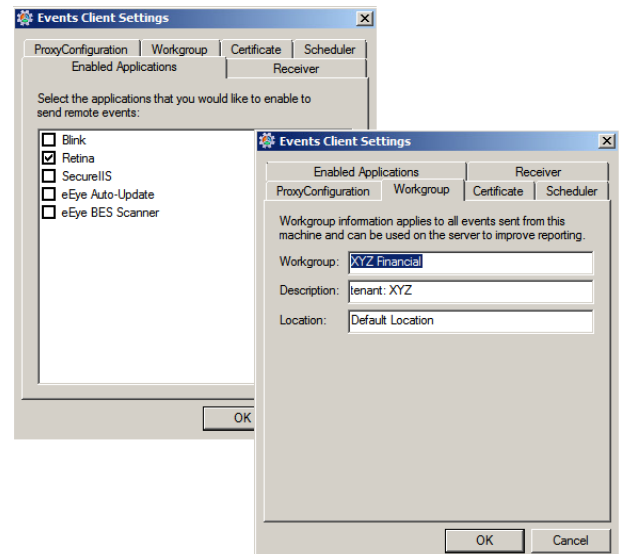
Each Discovery Scanner must be assigned a workgroup. A workgroup is typically created when the agent is initially deployed.

You can add and delete workgroups. However, you cannot rename workgroups.

You can delete a workgroup only if it is not associated with an organization, mobility connector, or Discovery Scanner.

Use the **Events Client Configuration** tool to create a workgroup.

1. Log on to the asset where the agent resides.
2. Start the **Events Client Configuration Tool**.
3. Select the **Enabled Application** tab, and check the box for the agent.
4. Select the **Workgroup** tab and enter a name and description.
5. Click **OK**.



### Add an Organization

An organization is automatically populated with an **All Assets** Smart Group.

1. In the BeyondInsight console, go to **Configuration > General > Organizations**.
2. From the **Organizations** pane, click **Create New Organization**.
3. Enter the name of the organization, and then click **Create Organization**.
4. The **Active** option is enabled by default and must be enabled to successfully run scans on the tenant's assets.
5. Click **Create New Workgroup**.
6. Create a new workgroup or add an existing workgroup.
7. Click **Save Changes**.

## Create a Group for a Tenant to Run BeyondInsight Reports

You can optionally create a user group for a tenant to allow the tenant's users to log in to BeyondInsight and run reports. When creating the user group, ensure that you assign **Read only** permissions to the **Analytics and Reporting** and **Management Console Access** features. Additionally, assign **Read only** permissions to the tenant's Smart Rules. The users can then run reports based on the Smart Rules.

**i** For more information on creating groups and assigning permissions in BeyondInsight, please see "[Role-Based Access](#)" on [page 22](#).

As a security measure, a tenant cannot log in to BeyondInsight by default.



# Set BeyondInsight Options

## Set Account Lockout Options

You can set lockout options, such as lockout threshold and duration.

1. Select **Configuration**.
2. Under **Role Based Access**, select **Local Account Settings**.
3. Under **Account Lockout**, set the following options:
  - **Account Lockout Duration:** Sets the number of minutes that the user is locked out after they hit the account lockout threshold. Once this time has elapsed, an attempt will be made to unlock the account during the user's next log in. Setting this value to **0** (zero) requires the account to be manually unlocked by an administrator.
  - **Account Lockout Threshold:** Sets the number of times a user can try their password before the account is locked out.
  - **Account Lockout Reset Interval:** Sets the number of minutes after an account is locked due to unsuccessful entry attempts before resetting the lockout counter.
  - **Unlock account upon password reset request:** When set to **Yes**, unlocks the account when the **Forgot Your Password** process is followed by the user. When set to **No**, the user may reset their password using the **Forgot Your Password** process, but the account remains locked until an administrator unlocks it.
  - **Send lockout notification:** When set to **Yes**, sends a notification to the email address configured in the **Lockout Notification Recipients** when any account becomes locked out.
  - **Lockout notification recipients:** Sets the email address where the lockout notification is sent. The **Send Lockout Notification** switch must be set to **Yes** for this to be relevant.
4. Click **Update Account Lockout Options**.

## Set Account Password History

To set the account password history option:

1. Select **Configuration**.
2. Under **Role Based Access**, select **Local Account Settings**.
3. Under **Account Password**, set the following option:
  - **Enforce Password History:** Enter the number of passwords a user must create before an old password can be reused. Enter **0** to not enforce a password history. There are no restrictions on using past passwords when **0** is entered.
4. Click **Update Account Password Options**.

## Configure Email Notifications

The email notification functionality allows BeyondInsight to send email under certain circumstances. This includes, but is not limited to, emails sent upon ticket assignment, password reset, user lockout notifications, smart rule actions, or API authentication failures.



**Note:** Email SMTP settings are initially set in the BeyondInsight configuration tool. Verify these settings are accurate and that you use the same information. Changes made here will be reflected in the configuration tool.

1. Select **Configuration**.
2. Under **System**, select **Email Notifications**.
3. Enter an email address in the **From email address** box. This sets the email address that appears in the **From** and **Reply-To** fields for email notifications sent by BeyondInsight.
4. Optionally, enable the **Notify administrator on cloud connector failure** setting. When enabled, this option sends an email if an error occurs while collecting cloud data using a connector configured in BeyondInsight.
5. Click **Update Email Notification Options**.



**Note:** An email is sent every 24 hours.



If you use Clarity, for configuration information please see [Configure Clarity Analytics](https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/analytics/configure.htm#Clarity) at <https://www.beyondtrust.com/docs/beyondinsight-password-safe/bi/analytics/configure.htm#Clarity>.

## Set Support Options

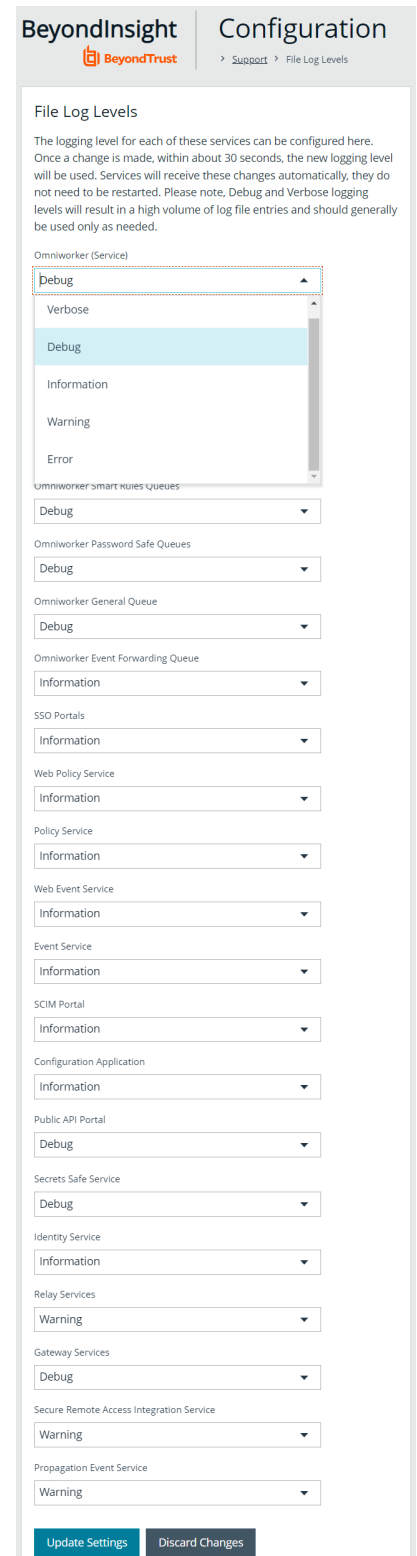
You can use the following support options to assist with troubleshooting issues with BeyondInsight:

- Select log levels for BeyondInsight services log files.
- Enable and configure system event recording. This feature consolidates selected events from multiple log files to the BeyondInsight database and displays this data in the System Event Viewer grid.
- View recorded system events.

### Select File Log Levels

1. In BeyondInsight go to **Configuration > Support > File Log Levels**.

2. For each service, select the desired logging level:
  - The options are **Verbose**, **Debug**, **Information**, **Warning**, and **Error**.
  - The default for all services is **Information**.
  - **Verbose** and **Debug** create a large volume of entries and should be used only when necessary.
3. Click **Update Settings**.
4. Changes take effect in about 30 seconds. Services do not need to be restarted.




The screenshot shows the 'BeyondInsight Configuration' page with the 'File Log Levels' section expanded. A dropdown menu for 'Omniworker (Service)' is open, showing options: Verbose, Debug (selected), Information, Warning, and Error. Below this, a list of services and their current logging levels is shown:

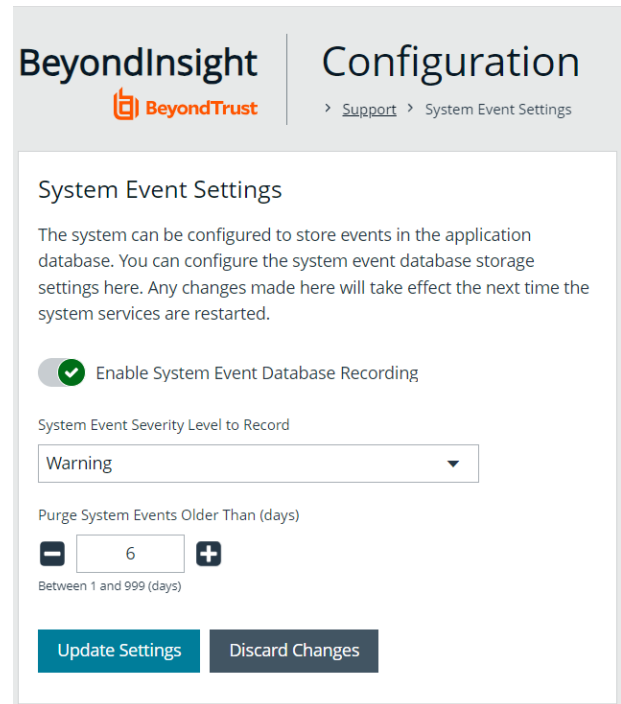
Service	Logging Level
Omniworker (Service)	Debug
Omniworker smart-queues-queues	Debug
Omniworker Password Safe Queues	Debug
Omniworker General Queue	Debug
Omniworker Event Forwarding Queue	Information
SSO Portals	Information
Web Policy Service	Information
Policy Service	Information
Web Event Service	Information
Event Service	Information
SCIM Portal	Information
Configuration Application	Information
Public API Portal	Debug
Secrets Safe Service	Debug
Identity Service	Information
Relay Services	Warning
Gateway Services	Debug
Secure Remote Access Integration Service	Warning
Propagation Event Service	Warning

At the bottom of the configuration panel, there are two buttons: 'Update Settings' (highlighted in blue) and 'Discard Changes'.


## Enable System Event Recording

1. In BeyondInsight go to **Configuration > Support > System Event Settings**.
2. Click the toggle to **Enable System Event Database Recording**.
3. From the **System Events Severity Level to Record** dropdown, select:
  - **Warning**, to record warnings and errors
  - **Error**, to record errors only
4. Set the number of days to retain recorded events in the field **Purge System Events Older Than**.

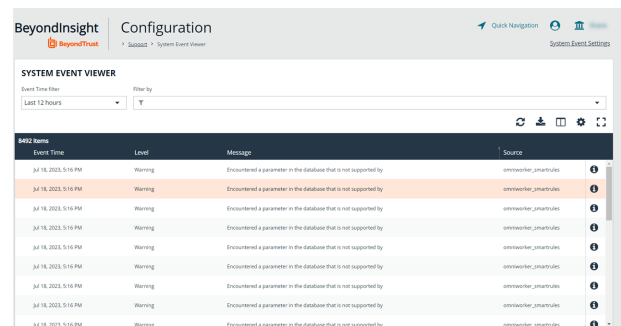
 **Note:** Once events are purged, they are not available in the System Event Viewer.



## System Event Viewer

 **Note:** System event recording must be enabled (as above) to view events in the System Event Viewer.

1. In BeyondInsight go to **Configuration > Support > System Event Viewer**.
  - This screen shows the events recorded and retained as per the **System Event Settings**.
  - The list of events can be filtered by **Event Time** and additional filters can be added.
  - On the right, above the column headings, there are icons to refresh and download the list of events, and to modify the appearance of the list, including adding or removing columns.
  - You can sort any column by clicking on the heading. An arrow appears to indicate whether the sort is ascending or descending. Click again to reverse the sort.
  - At the bottom of the list, you can page through the events and set the number to display per page.
2. To view the full log file entry for any event, click the **i** at the right end of the event row.



## Set Data Retention and Advanced Purging Options

When data is initially collected, it is stored as unprocessed data in the BeyondInsight database. After the data is processed and made available in the management console and reports, the unprocessed data is no longer needed. To maintain a manageable database size, the unprocessed data is purged at regular intervals. Go to **Configuration > System > Data Retention** to manage BeyondInsight's data retention.

### Data Retention

#### Maintenance

To maintain a manageable database size, the unprocessed data is purged at regular intervals. These intervals are for the purging of Discovery Management data and can be configured here.

Purge general events older than	<p>Sets the number of days to keep the data sent by the agents.</p> <p>General events can include events like checking in and trying to connect to assets, and firewall events which might indicate that the scan cannot process because of a firewall blocking the connection.</p> <p>The default number of days is <b>7</b>.</p>
Purge attacks older than	<p>Sets the number of days to keep attack data that was discovered by the protection agent.</p> <p>Recommended: <b>90 days</b>.</p>
Purge application events older than	<p>Sets the number of days to keep the application events sent by the agents.</p> <p>The default value is <b>7</b>.</p>
Purge scans older than	<p>Sets the number of days to keep the information defined in the scan settings.</p> <p>Recommended: <b>7 days</b>.</p>
Purge scan events older than	<p>Sets the number of days to keep the data collected in scans.</p> <p>Recommended: <b>7 days</b>.</p>
Purge attack events older than	<p>Sets the number of days to keep the data sent by the protection agents.</p> <p>Recommended: <b>7 days</b>.</p>
Purge discovery agent jobs every N days	<p>When enabled, sets the number of days to keep the discovery data collected by the agents.</p> <p>Recommended: <b>1 day</b>.</p>

Click **Update Maintenance Options** to save your option settings.

#### Privileged Access Management

To maintain a manageable database size, older event data is purged at regular intervals. The intervals for the purging of privileged access management event data can be configured here.

Purge Windows events older than	Purges the information sent by the protection agents.
---------------------------------	---

	<b>The default value is 90 days.</b>
Purge Endpoint Privilege Management events older than	Sets the number of days to keep Endpoint Privilege Management's unprocessed event data. <b>The default is 30 days.</b>
Purge Privilege Management for Unix & Linux events older than	Sets the number of days to keep events sent by Privilege Management for Unix & Linux Servers.
Purge file integrity events older than	Sets the number of days to keep File Integrity events captured by Endpoint Privilege Management.
Purge Endpoint Privilege Management Session Monitor events older than	Sets the number of days to keep the events collected when session monitoring is being used.
Purge Identity Services events older than	Sets the number of days to keep Identity Services unprocessed event data.

Click **Update Privileged Access Management Maintenance Options** to save your option settings.

## Asset Maintenance

To maintain a manageable database size, the unprocessed data is purged at regular intervals. The intervals for the purging of asset data can be configured here.

Purge assets	When enabled, <b>Purge assets older than</b> sets the number of days to keep asset data for assets that were discovered once, but are never discovered again.  Recommended: <b>30 days.</b>
Purge asset attributes	When enabled, <b>Purge asset attributes older than</b> sets the number of days to keep asset attribute data, such as ports, services, hardware, and attack events.  Recommended: <b>7 days.</b>
Purge Cloud assets	When enabled, <b>Purge Cloud assets older than</b> sets the number of days to keep cloud asset data.  Cloud asset purging does not run unless <b>Purge Assets</b> is also enabled. The <b>Purge cloud assets older than</b> setting must always be equal to or less than the <b>Purge assets older than</b> setting.  Recommended: <b>30 days.</b>

Click **Update Asset Maintenance Options** to save your option settings.

## Application Maintenance

To maintain a manageable database size, the unprocessed data is purged at regular intervals. The intervals for the purging of application data can be configured here.

Purge reports older than	Sets the number of days to keep report files that are stored on the file system and corresponding database.  The default value is <b>90 days.</b>
--------------------------	---

<b>Purge application user audits older than</b>	<p>Sets the number of days to keep user application audit data. Audit data is the record of user activities in the BeyondInsight system.</p> <p>The default and recommended value is <b>120 days</b>.</p>
<b>Purge closed tickets older than</b>	<p>Sets the number of days before closed or inactive tickets are deleted.</p> <p>The calculation for purging ensures the ticket is closed and uses the date the ticket was last updated, not the due date.</p> <p>For example, a ticket has a due date 60 days in the future but the ticket was closed and not edited for over a week. If the purge setting is set to <b>7</b>, then the ticket is purged even though the due date is in the future.</p>

Click **Update Application Maintenance Options** to save your option settings.

### Third-Party Integration Maintenance

To maintain a manageable database size, the temporary data is purged at regular intervals. The interval for the purging of **Third Party Integration** temporary data can be configured here.

<b>Purge third-party uploads older than</b>	<p>Sets the number of days to keep the information about the scan files that you upload.</p> <p>The default is <b>90 days</b>.</p>
---	--

 **Note:** *The data in the scan file is not purged.*


Click **Update Third-Party Integration Maintenance Options** to save your option settings.



## Purging Options

In addition to purging data according to the data retention settings, the nightly purge can be configured with these advanced options. Go to **Configuration > Support > Purging Options** to set the following advanced options:

- **Database Index Maintenance:** (Disabled by default) Rebuilds or reorganizes the indexes depending on what would be better for that index.
- **Nightly Database Statistics Maintenance:** (Enabled by default) Updates the statistics on any that are out of date.
- **Batch Purging:** (Disabled by default) Enable this option to purge multiple assets at one time in a batch. When this option is enabled, the complete asset, including all asset attributes is purged (all older data is removed from the asset). When this option is disabled, one asset is purged at a time, as opposed to a batch of assets.
- **Loop Based Purging:** (Disabled by default) When this option is enabled, after a round of purging is complete, the purge window is checked and if still in the purge window AND there are more than 1000 items left to purge, another round of purging begins. This looping cycle repeats until the purge window expires or there is not enough data worth deleting. The default purge window begins at 1:00 AM and is two hours long. When this option is disabled, only one round of purging is performed each day.



**BeyondInsight**

## Configuration

> [Support](#) > Advanced Purge Options

### Advanced Purge Options

In addition to purging data according to the data retention settings, the nightly purge can be configured with these advanced options as well.

Database Index Maintenance

Frequency

Daily
▼

Start Time

01:30
⌄

Max time to execute (min)

-

30

+

Max number of indexes

-

50

+

Nightly Database Statistics Maintenance

Batch Purging

Loop Based Purging

Update Settings

Discard Changes

## Configure Proxy Settings

You can configure a proxy server if your BeyondInsight server does not have direct internet access.

1. In the BeyondInsight console, go to **Configuration > System > Proxy Settings**.
2. Check **Enable proxy support**.
3. Enter the IP address (including the prefix **http://**) or the FQDN (for example, **somehost.example.com**) of the proxy server, username, and password for the proxy server.



**Note:** The **HTTPS** protocol is not supported for the IP address or the fully qualified domain name.

4. Check **Local proxy override**.
5. Click **Update Proxy Settings**.

## Configure Discovery Management Options

### Set Job Refresh Options

You can set a refresh interval, which changes job refresh logic to avoid polling third party credentials. Instead, the jobs refresh a number of minutes before scan. You can set refresh intervals for scan jobs and Smart Rules. Scans can run more efficiently when Smart Rules are set to refresh at longer intervals.

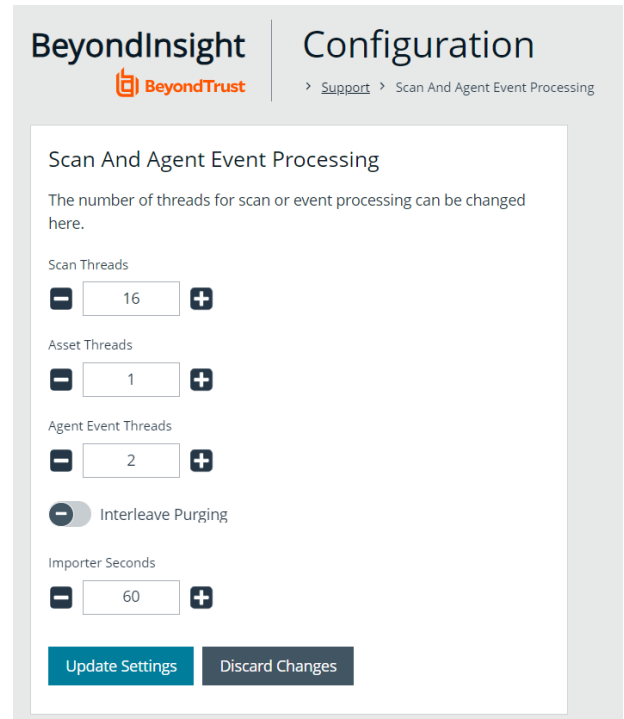
1. in the BeyondInsight console, go to **Configuration > Discovery Management > Options**.
2. Under **Job Refresh**, set the following options:
  - **Maximum job refresh frequency:** BeyondInsight jobs are refreshed at the interval set. When the refresh occurs, updates to schedules, scanners, and Smart Rules are updated for the job. The default value is **360** minutes.
  - **Time to refresh before scan for third party credentials:** Sets a refresh interval which changes job refresh logic to avoid polling third party credentials. Instead, the jobs will refresh a number of minutes before scan.

## Set Scan and Event Processing Options

Go to **Configuration > Support > Processing Options** to set the number of threads for scan and event processing. The following options are available:

- **Scan Threads:** The number of scans that can be processed at one time. The default is **16**.
- **Asset Threads:** The number of assets per scan that can be processed at one time. The default is **1**.
- **Agent Event Threads:** These are threads used for **Discovery Scan** data processing.
- **Interleave Purging:** When set to **yes**, uses idle threads to work on purging assets one at a time, if there are any assets queued up to be purged. If set to **no** (default), all purging activity is restricted to the dedicated purge window.
- **Importer seconds:** The number of seconds between each attempt to purge; only applies if **Interleave Purging** is set to **yes**.

Click **Update Settings** when done.



**BeyondInsight** Configuration

> Support > Scan And Agent Event Processing

### Scan And Agent Event Processing

The number of threads for scan or event processing can be changed here.

Scan Threads:

Asset Threads:

Agent Event Threads:

Interleave Purging

Importer Seconds:

**Update Settings** **Discard Changes**

## Configure Global Site Options

You can configure global website settings from the **Configuration > System > Site Options** page, including:

- Changing the **Login** page to include lists of domains and LDAP servers
- Displaying the **Forgot Password** link on the **Login** page
- Displaying social media links on the **Login** and **About** pages
- Changing the refresh interval for Smart Rules
- Configuring a pre-login banner to appear to users before logging into the site
- Configuring session options
- Enabling and disabling Endpoint Privilege Management options
- Enforcing certificate validation during communication for LDAPS managed account tasks and LDAPS / AD user authentication and directory queries
- Turning on language selection
- Enabling and disabling the requirement to provide an access key when creating, editing, or using discovery scan credentials.
- Creating a global access key to be used for all discovery scan credentials

## List Domains and LDAP Servers on the Login Page

Users can log in to the management console using Active Directory or LDAP credentials. When this site setting is enabled, the user can select a domain or LDAP server from the **Log in to** list. Domain and LDAP server information is based on the Active Directory and LDAP user group information.



**Note:** The **Log in to** list is only displayed on the **Login** page when there are either Active Directory or LDAP user groups created in the management console.



**Tip:** By default, the setting is enabled. If you do not want to display domains or LDAP servers on the **Login** page, disable the setting.

1. Under **Login Page**, uncheck the box to disable **Show list of domains/LDAP servers on login page**.
2. Click **Update Login Page Options**.

You must log out and log back in for the change to take effect.

## Disable Forgot Password Link

Users logging into the console using Active Directory credentials cannot use the **Forgot Password** feature. In this scenario, you can disable the setting so the link is no longer displayed on the **Login** page.

1. Under **Login Page**, uncheck the box to disable **Show Forgot Password link on login page**.
2. Click **Update Login Page Options**.

You must log out and log back in for the change to take effect.

## Disable Social Media links on the Login and About pages

By default, links for Facebook, Twitter, LinkedIn, and YouTube are available at the bottom of the **Login** page and also on the **About** page.

1. Under **Login Page**, uncheck the box to turn off **Show social media links on login and about pages**.
2. Click **Update Login Page Options**.

You must log out and log back in for the change to take effect.

## Change the Refresh Interval for Smart Rules

Scans can run more efficiently when Smart Rules are set to refresh at longer intervals.

1. Under **General**, set the number of minutes for **Maximum Smart Rule refresh frequency for asset updates**. The default is **60**.
2. Click **Update General Options**.

## Configure a Pre-Login Banner

You can configure a banner to appear to all users upon access to the site.

1. Under **Pre-Login Banner**, check the **Show banner** option to enable it.
2. Provide a title and message, and then click **Update Pre-login Banner Options**.

## Configure Session Options

You can configure the following session related options:

- Session timeout
  - Notification time before session timeout
  - Minimum interval between session extension requests
  - User Quarantine Cache refresh interval
1. Under **Session**, set the following:
    - **Session timeout:** Sets the amount of time for session inactivity before the session times out. Session timeout can be set between 2 and 60 minutes, with the default set at 20 minutes.
    - **Notification time before session timeout:** Sets the amount of time, prior to the session timing out due to inactivity, that the system notifies the user that their session will timeout shortly. This value must always be less than the session timeout value.
    - **Minimum interval between session extension requests:** Sets the number of minutes that pass between session extension requests. In general, this setting should always be set low and should always be less than the session timeout value. The only time you should change this from the default of three minutes is if there are a severely high number of simultaneous users and session refresh requests to the server causing high loads.
    - **User Quarantine Cache refresh interval:** Account Quarantine is a feature that can be set at the user account level that prevents a user from logging on the console or API and also terminates any active sessions immediately. It is a preventative measure taken when suspicious activity is detected. The User Quarantine Cache refresh interval sets the number of seconds that pass before the database is updated with the most recently discovered user accounts from the

quarantine cache. The quarantine is only applied to the user account after the database is updated. The user can remain logged on and sessions remain active up until the refresh interval time passes, and the database is updated with a **Quarantine** status. The default value is **600** seconds. The maximum value is **1200** seconds.

2. Click **Update Session Options**.



**Note:** Changes to the **Session Timeout** value take effect the next time an Internet Information Services (IIS) reset is performed. Changes to **Notification Time**, **Minimum Interval**, and **User Quarantine Cache Refresh Interval** do not require an IIS reset.

## Enable Language Selection (Localization)

The management console can be viewed in the following languages:

- German
- English (US)
- Spanish (LA)
- French (FR)
- French (CA)
- Korean
- Japanese
- Portuguese (BR)

By default, the **Language** list is not displayed in the BeyondInsight console. Once localization is enabled, the **Language** list may be accessed from the **Profile and preferences** icon in the top right corner of the console and also from the bottom of the **Login** page.

1. Under **Localization**, check the box to enable the **Show language picker** option.
2. Click **Update Localization Options**.

You must log out and log back in for the change to take effect.

## Enable Endpoint Privilege Management Options

Endpoint Privilege Management options are not enabled by default. You can enable the following options:

- Include arguments when creating rules
- Suppress events where rule has been applied
- Automatically retrieve initial grid data

## Enable Certificate Validation

Certificate validation helps enforce the validity of a given certificate during communication. You can enforce the validation for LDAPS managed account tasks and LDAPS / AD user authentication and directory queries. Turning these options on will mean that valid certificates are required and Certificate Authorities must be installed on the server.

## Configure Global Discovery Credential Access Keys

When the **Require a Discovery Credential Key** option is enabled, all discovery credentials require the global credential access key. Enable the option, and then enter a **Global Credential Key**.



**Note:** You may still set a custom key on individual credentials to something other than the default.

When the **Require a Discovery Credential Key** option is disabled, all discovery credentials do not require an access key and all previously configured credential keys (including custom keys) are deleted.




**Note:** These settings apply to ALL discovery credentials for ALL tenants.

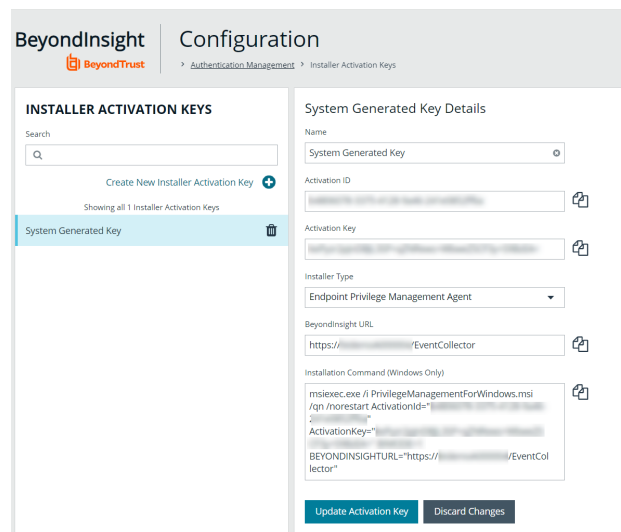



# Configure OAuth Authentication for Agents Using Installer Activation Keys

Using BeyondInsight 24.1 or a later version, you can use installer activation keys to leverage OAuth authentication when configuring the integration between BeyondInsight and Endpoint Privilege Management (EPM) agents that support OAuth communications. Prior to this, the integration between EPM agents and BeyondInsight was certificate-based only. While certificate-based authentication is still available, the addition of OAuth authentication greatly simplifies the setup process.

 **Note:** OAuth authentication using Installer Activation Keys is planned for Discovery Agents in a future release of BeyondInsight.

1. Go to **Configuration > Authentication Management > Installer Activation Keys**.
2. To use the key generated by the system:
  - Select **System Generated Key**.
  - Copy the installation command and use it when deploying the agent.
3. To create a new installer key:
  - Click **Create New Installer Activation Key +**.
  - Enter a name for the key.
  - Click **Create Activation Key**.
  - Copy the installation command and use it when deploying the agent.



 **Note:**

- A maximum of 10 installer activation keys can be present at any one time, including the system generated key.
- Keys can be deleted and new ones can be created as long as no more than 10 keys exist at once.
- Once the endpoint communication is established with BeyondInsight, the activation key is no longer required. We recommend deleting it.
  - Having deleted it, if an endpoint stops working and has to be configured again, you must create a new installer activation key before uninstalling and reinstalling the client.

## Configure BeyondInsight Clarity Analytics

BeyondInsight Clarity is a behavior analytics tool that examines and classifies events and activities to identify outliers or anomalies. An outlier is an observation which deviates so much from the other observations that it arouses suspicion. Clarity ranks activities and classifies assets according to their deviation from normal activity. The normal activity or baseline is formed from:

- History of past activities
- Risk attributes of an observed activity

Each activity or event has several key characteristics. When an observed characteristic goes beyond normal, an alert is issued. More flagged alerts indicates higher level of abnormality and threat level. The numeric threat level is the sum of all flagged alerts. In addition, all assets are grouped into clusters by similarity, taking into account all available information including vulnerabilities, attacks, installed applications, services, open ports, running applications, etc.

As a result, the behavior analytics:

- Assigns a threat level to each event from BeyondTrust Discovery Scanner, Endpoint Privilege Management, Privilege Management for Unix & Linux, and Password Safe.
- Assigns cluster ID to all assets.

You can use Clarity to analyze data from the following sources:

- Endpoint Privilege Management
- Privilege Management for Unix & Linux
- BeyondTrust Discovery Scanner
- Password Safe
- Third-party imports

To work with BeyondInsight Clarity, you must configure settings in the BeyondInsight management console.

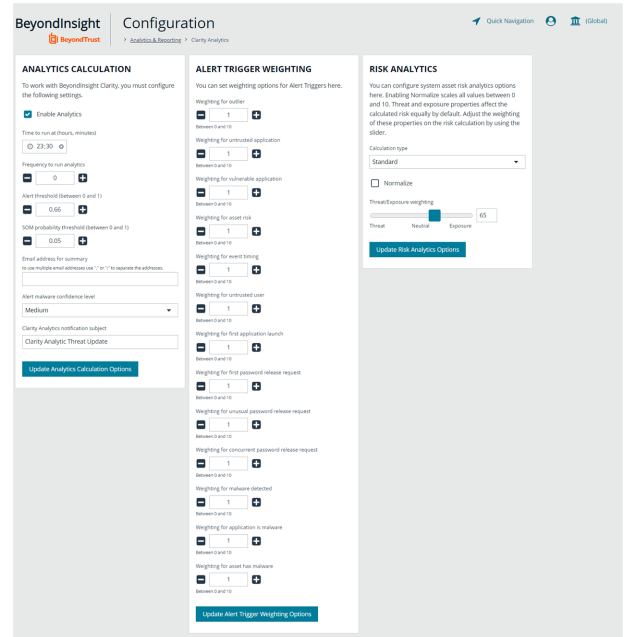
## Configure the Analytics Calculation

1. In the console, click **Configuration**.
2. Under **Analytics & Reporting**, click **Clarity Analytics**.

3. From the **Analytics Calculation** section, you can:

- Enable and disable analytics.
- Select the hours and minutes for **Time to run at**.
- Select the frequency for running analysis.
- Set the **Alert Threshold** for flagging explicit alerts. The higher the value, the higher the sensitivity and the fewer flagged alerts. The range is from **0** to **1**. The default value is **0.65**.
- Set the **Som Probability Threshold** for flagging pattern alerts. The lower the value, the higher the sensitivity and the fewer flagged alerts. The range is from **0** to **1**. The default value is **0.05**.
- Enter an email address to send notifications to.
- Set the notification subject.

4. Click **Update Analytics Calculation Options**.



## Set Alert Trigger Weighing

From the **Alert Trigger Weighing** section, you can configure Clarity to prioritize or weigh specific alerts. If an alert with a higher weight is triggered, the alert appears more prominently in the Clarity analysis. This allows you to quickly see and react to critical alerts.

To configure a weight for an alert, click the minus and plus buttons to modify its numeric value, ranging from **0** to **10**. When you are satisfied with your selections, click **Update Alert Triggering Weighing Options** to finalize.

## Configure Risk Analytics

Using the risk analytics values, you can focus the results data on the highest risk assets.

Enabling **Normalize** scales all values between 0 and 10. When you choose to normalize the data, the asset at the highest risk is assigned the highest rating. All other assets are rated and organized below the highest risk asset. Normalizing the results provides a way to distribute the assets in a more meaningful way to analyze the data.

Threat and exposure properties affect the calculated risk equally by default. Adjust the weighting of these properties on the risk calculation by using the slider. You can change the results to emphasize risk levels based on exposures or threats. For example, if you move the slider to **Exposure**, asset exposure risk factors are given greater weighting in the final risk calculation and increase an asset's risk score.

## Clarity Reports

The following reports are available to run against Clarity data:

- **Event Review - Endpoint Privilege Management:** Breakdown of alert triggers for events by threat level. Includes relevant event details, and is ordered by threat level from largest to smallest.
- **Event Review - Password Safe Release Events:** Breakdown of alert triggers for Password Safe release events by threat level.

- **Event Review - Privilege Management for Unix & Linux** Breakdown of alert triggers for Privilege Management for Unix & Linux events by threat level. Includes relevant event details, and is ordered by threat level from largest to smallest.
- **Top 10 Assets by Total Threat Level:** Displays top 10 assets based on overall threat level.
- **Top 10 Users by Threat Level:** Displays top 10 users based on overall threat level.

## Use the Clarity Dashboard

The Clarity Dashboard analyzes information stored in BeyondInsight's centralized database, which contains data gathered from across any or all BeyondInsight supported solutions deployed in the customer environment. These include:

- Endpoint Privilege Management
- Privilege Management for Unix & Linux
- BeyondTrust Discovery Scanner

## Triggers

The **Triggers** list displays the total number of events which are affected by each trigger. The following triggers identify assets that are at risk.

Trigger	Description
Untrusted User	Triggers when potentially untrusted users log into Administrator or local accounts. Can be triggered by events in the following products: <ul style="list-style-type: none"> <li>• Endpoint Privilege Management</li> <li>• Privilege Management for Unix &amp; Linux</li> <li>• BeyondTrustDiscovery Scanner</li> </ul>
First Password Request	<ul style="list-style-type: none"> <li>• Password Safe events</li> <li>• User requests password for a managed account and system they have never requested before</li> </ul>
Outlier	Triggers when an event is determined to be an outlier based on Clarity analysis. Can be triggered by events in the following products: <ul style="list-style-type: none"> <li>• Endpoint Privilege Management</li> <li>• Privilege Management for Unix &amp; Linux</li> <li>• Password Safe</li> <li>• BeyondTrust Discovery Scanner</li> </ul>
Unusual Password Release Request	<ul style="list-style-type: none"> <li>• Password Safe events</li> <li>• User does not retrieve the password for approved request or the password is retrieved more than once</li> </ul>
Concurrent Password Release Request	<ul style="list-style-type: none"> <li>• Password Safe events</li> <li>• Triggers if a user requests more than one password at the same time.</li> </ul>
Untrusted Application	<ul style="list-style-type: none"> <li>• Endpoint Privilege Management events.</li> <li>• Triggers when unsigned and un-versioned applications are found on system.</li> </ul>
First Application Launch	Triggers when an application is launched for the first time. Can be triggered by events in the following products:

- Endpoint Privilege Management
- Privilege Management for Unix & Linux
- User launches an application they have never launched before

If a trigger has events, you can click the trigger to view the risk events that make up the count.

## Risk Events by Threat Level

Drill into the risk events to learn more about the event, such as the trigger, type of event, or severity. Use the **Tab** key to navigate through the areas on the page and to view the metrics on the bubbles.

## View Cluster Maps



**Note:** This feature is deprecated for new installations of BeyondInsight 22.1 and future releases. Cluster Maps and Cluster Analysis are available only for BeyondInsight releases prior to 22.1 and if upgrading to 22.1 from previous releases.

A cluster map is a visual representation of the following cluster types.

- **Asset Cluster:** Larger clusters indicate more assets sharing similar traits within an organization. Smaller clusters indicate a potential anomaly. Clusters groups include:
  - Launched applications
  - Vulnerabilities
  - Attacks
- **User Cluster:** Represents Password Safe users that share similar characteristics in an organization.

## Cluster Map Numbering

A cluster map number is randomly generated and does not have any meaning in the context of the actual data. However, the closer the cluster map numbers, the more similar the attributes of the assets to each other.

For example, assets assigned to cluster 14 and cluster 16 would have similar qualities. However, assets assigned to cluster 14 and cluster 68 would have fewer qualities in common.

The cluster map numbers can change at any time, but this does not reflect on the assets or any potential anomalies that might exist.

## Cluster Shading

### Asset

Shading is based on the **Asset Risk, Attacks, Vulnerability** app value. The Cluster Map uses the highest of the three, and the gradient is based on a range from 0.0 to 1.0.

### User

Shading is based on the **User Risk** attribute for Password Safe users.

## Asset Cluster Attributes

There are eight cluster attributes organized in the following categories:

- **Ordering attributes:** Attributes are ordered from low to high.
- **Pattern attributes:** A pattern value maps a set of characteristics to a single value (in the range 0 – 1). The difference in pattern values shows similarities between different sets of the same type characteristics.

Attribute	Type	Description
Attacks	Ordering	Number of detected attacks. Greater value means more detected attacks.
Vulnerable Apps	Ordering	Number of launches of vulnerable applications. Greater value means more started/running vulnerable applications.
Risk	Ordering	Asset risk. Greater value means greater risk.
App Set	Ordering	Running or/and elevated (depends on Privilege Management for Windows Servers) applications.
Vulnerabilities Set	Pattern	Discovered vulnerabilities.
Service Set	Pattern	Services
Software Set	Pattern	Installed software packages.
Port Set	Pattern	Opened ports.

## User Cluster Attributes

Attribute	Type	Description
SharedSysAssetRisk	Ordering	Number of blocked commands in a Password Safe session, corresponds to block, block+lock, lock, and terminate command triggers.
SharedSysDenied	Ordering	Number of denied session requests.
SharedUsrRisk	Ordering	Maximum risk on an access policy associated with the user.
SharedSysSet	Pattern	Machines a user can access.
SharedSysVulnSet	Pattern	Vulnerabilities for machines a user can access.
SharedSysSrvSet	Pattern	Services for machines a user can access.
SharedSysSoftSet	Pattern	Software installed for machines a user can access.
SharedSysPortSet	Pattern	Ports for machines a user can access.

## Analyze Cluster Maps

You must configure settings in BeyondInsight before any data is collected.

The following procedure shows examples from asset clusters. The procedure and analysis is similar for user clusters.

1. From the menu, select **Cluster Analysis**. By default, the **Cluster Map** tab is selected.
2. Select one of the following tabs to analyze cluster map data:
  - **Asset Counts:** Clusters the assets with similar characteristics. The smaller the cluster tile, the more likely there is an outlier.
  - **Cluster Risk:** Clusters the assets based on the common risk characteristics. The larger tiles in the cluster map have the greater risk.
  - **Attacks:** Clusters assets based on the common attack properties. The larger tiles indicate a greater attack level. Drill down to learn more about the assets and the attack data.
  - **Vulnerable Apps:** Clusters the assets by the similar installed vulnerable applications. The larger tiles indicate a greater threat as a result of installed vulnerable applications on the assets.
3. Hover over the tile to display a summary of the event data.
4. Double-click a cluster to view more detail, and click the tabs to view more information.





For more information, please see "[Configure BeyondInsight Clarity Analytics](#)" on page 134.

## Analyze Cluster Grids

Some key tips to keep in mind when analyzing threat conditions in your Clarity results data:

- Sort clusters by ordering attributes, such as **Vulnerable Apps**, **Attacks**, or **Risk**.
- Potential outliers could be clusters with a small number of members and greater ordering attributes.
- For outliers, review the pattern attributes to identify if the outliers have a unique or a different set of running applications, vulnerabilities, services, software, or ports.


To view the cluster grid, follow the steps.

1. From the menu, select **Cluster Analysis**.
2. Click the **Grid View** icon.
3. To review asset details for a cluster, double-click the row.

## Alerts in BeyondInsight Clarity Analytics

There are two types of alerts:

- **Pattern:** Determined by correlation of all characteristics of an event.
- **Explicit:** Determined by selected specific characteristics.

Alert	Type	Description
a1	pattern	<p>Maps all characteristics of an event into a single internal cluster using self-organizing maps clustering. Similar event characteristics lead to the same cluster. Thus, clusters with high share of mapped events represent typical behavior, while clusters with small number of events indicate outliers. Each user, host, or asset's characteristics are tracked independently with independent sets of clusters.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <b>Note:</b> Clusters are hidden and are used only for analysis. They do not behave the same as asset clusters.                 </div> <p>Used characteristics:</p> <ul style="list-style-type: none"> <li>• Endpoint Privilege Management events, per user: <b>EventType, Exercised privilege, Path, Asset, Launch weekday and time</b></li> <li>• Privilege Management for Unix &amp; Linux events, per RunHost: <b>RunCommand, RunCWD, PBLUUser, Policy Server, SubmitHost, FinishStatus, Launch weekday and time, Accept, RiskLevel</b></li> <li>• Vulnerability events, per Asset: Vulnerability type, Risk</li> <li>• Attack events, per Asset: Attack type, Category</li> </ul>
a2	explicit	<p>Untrusted Application</p> <p>Default value: 0.33</p> <ul style="list-style-type: none"> <li>• If the application is unsigned, then value = value + 0.33</li> <li>• If application has no version information, then value = value + 0.33</li> </ul>
a5	explicit	<p>Event Timing</p> <p>Event time within working hours and weekday</p> <p>Default value: 0.33</p> <ul style="list-style-type: none"> <li>• If <math>EventTime &lt; WorkingHoursStart</math> or <math>EventTime &gt; WorkingHoursEnd</math>, then value = value + 0.33</li> <li>• If <math>EventDay</math> is in <math>WorkingWeekDaysMask</math>, then value = value + 0.33</li> </ul>
a6	explicit	<p>Untrusted User</p> <p>Default value: 0.33</p> <ul style="list-style-type: none"> <li>• If user is local (not domain) user, then value = value + 0.33</li> <li>• If user is administrator, then value = value + 0.33</li> </ul>
a7	explicit	<p>First App Launch</p> <p>The alert is flagged when a user launches an application they have never launched before.</p>

Alert	Type	Description
a8	explicit	<p>First request for given managed account and system (Password Safe).</p> <p>The alert is flagged when a user request password for account and system have never requested before.</p>
a9	explicit	<p>Unusual password releases (Password Safe)</p> <p>The alert is flagged when a user does not retrieve the password for approved request or the password is retrieved more than once.</p>
a10	explicit	<p>Concurrent password requests (Password Safe).</p> <p>The alert is flagged when a user tries to acquire more than one password at a time.</p>

# Configure a Claims-Aware Website to Authenticate against SAML

You can configure a claims-aware website to bypass the current BeyondInsight login page and authenticate against any configured Federated Service that uses SAML to issue claims.

The claims-aware website is configured to redirect to a defined Federation Service through the **web.config**. Upon receiving the required set of claims, the user is redirected to the existing BeyondInsight website. At that point, it is determined if the user has the appropriate group membership to log in, given the claims associated with them.

If users attempting to access BeyondInsight have group claims matching a group defined in BeyondInsight, and the group has the **Full Control** permission to the **Management Console Access** feature, the user bypasses the BeyondInsight login screen. If the user is new to BeyondInsight, they are created in the system using the same claims information. The user is also added to all groups they are not already a member of that match in BeyondInsight, and as defined in the group claim information.

If the user is not a member of at least one group defined in BeyondInsight or that group does not have the **Full Control** permission to the **Management Console Access** feature, they are redirected to the BeyondInsight login page.

## Create a BeyondInsight Group

Create a BeyondInsight group and ensure the group is assigned the **Full Control** permission to the **Management Console Access** feature.

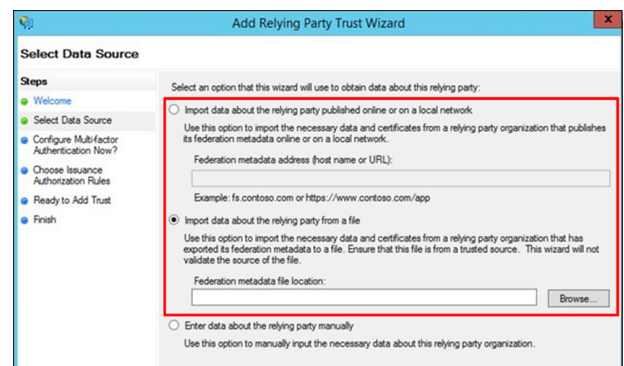
## Add Relying Party Trust

After BeyondInsight is installed, metadata is created for the claims-aware website. Use the metadata to configure the relying party trust on the Federation Services instance.

The metadata is located in the following directory:

`<Install path>\eEye Digital Security\Retina CS\WebSiteClaimsAware\FederationMetadata\2007-06\`

When selecting a **Data Source** in the **Add Relying Party Trust Wizard**, select the **FederationMetadata.xml** generated during the install.



## Set Up Claim Rules



**Note:** Claims rules can be defined in a number of different ways. The example provided is simply one way of pushing claims to BeyondInsight. As long as the claims rules are configured to include at least one claim of outgoing type **Group** (with **Group** claim matching exactly what is in BeyondInsight) and a single outgoing claim of type **Name**, then BeyondInsight has enough information to potentially grant access to the site to the user.

## Supported Federation Service Claim Types

Outgoing Claim Type	Outgoing Claim Type	Mapping to BeyondInsight User Detail
<a href="http://schemas.xmlsoap.org/claims/Group">http://schemas.xmlsoap.org/claims/Group</a>	Required	Group membership
<a href="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name">http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name</a>	Required	User name
<a href="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname">http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname</a>	Optional	Surname
<a href="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname">http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname</a>	Optional	First name
<a href="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress">http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress</a>	Optional	Email address

## Claims-Aware SAML

The following procedure demonstrates how to set up a claims-aware website using the Windows Identity Foundation (WIF) SDK.

1. Start the **Windows Identity Foundation Federation Utility**.
2. On the **Welcome** page, browse to and select the **web.config** file for **BeyondInsight Claims Aware** site. The application URI automatically populates.
3. Click **Next**.
4. Select **Using an existing STS**.
5. Enter **Root URL of Claims Issuer or STS**.
6. Select **Test location**. **FederationMetadata.xml** is downloaded.
7. Click **Next**.
8. Select a STS signing certificate option, and then click **Next**.
9. Select an encryption option, and then click **Next**.

10. Select the appropriate claims, and then click **Next**.
11. Review the settings on the **Summary** page, and then click **Finish**.

## Disable Forms Login

In environments where SAML, smart card, or claims-aware is configured, we recommend enabling the **Disable Forms Login** authentication option to disallow users from using the standard login form in BeyondInsight.

To disable forms login for existing users, enable this option directly on a user account as follows:

1. Click the vertical ellipsis for the user account, and then click **Edit User Details**.

- Under **Authentication Options**, check **Disable Forms Login** to enable the option.



**Note:** Please contact BeyondTrust Support for assistance if you need to bulk-apply this setting to existing accounts.

### Edit User ➤

[View User Details...](#)

**Identification**

First Name

Last Name

Email

Username

[Change Password](#)

**Contact Information**

Work Phone

Home Phone

Mobile Phone

**User Status**

Activation Date

Expiration Date

User Active

Account Locked

Account Quarantined

**Authentication Options** ?

Override Smart Card User Principal Name

Disable Forms Login

Two-Factor Authentication

[Update User](#) [Discard](#)

To disable forms login globally for newly created directory accounts:

- Navigate to **Configuration > Authentication Management > Authentication Options**.



2. Under **Forms Login Options**, check the **Disable Forms Login for new directory accounts** option to enable it.

#### FORMS LOGIN OPTIONS

Disable Forms Login should only be used in environments where SAML, Smart Card or Claims-aware is configured. Turning this option on will disallow users from using the standard login form in BeyondInsight.

Disable Forms Login for new directory accounts

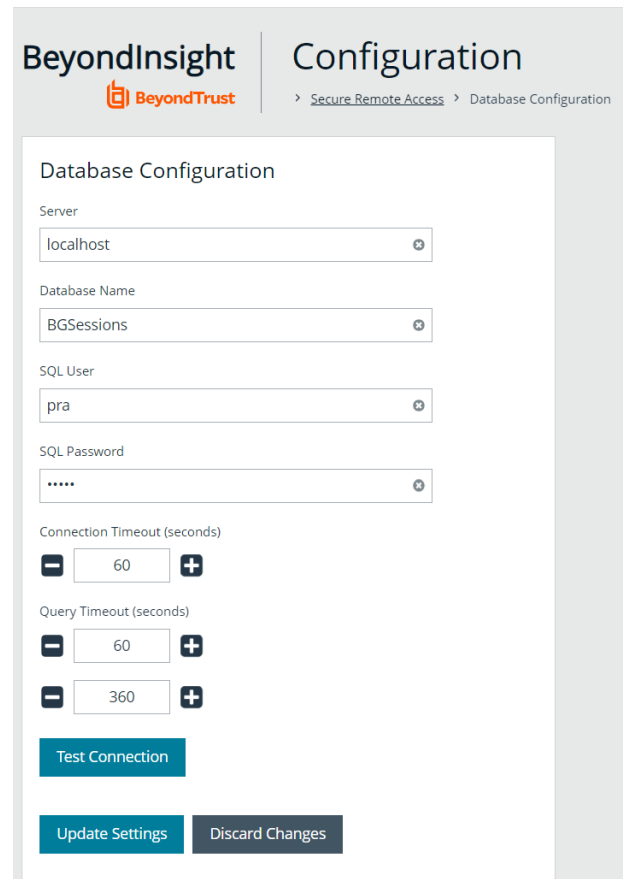
[Update Forms Login Options](#)

## View Privileged Remote Access Data

If you have a licensed instance of Privileged Remote Access configured in your environment, you can export session data to an export database. You can then review Privileged Remote Access session data in the BeyondInsight Console, using the Privileged Remote Access Dashboard.

## Configure the Privileged Remote Access Database Connection

1. In the BeyondInsight console, go to **Configuration > Secure Remote Access > Database Configuration**.
2. Provide the settings to connect to your Privileged Remote Access export database, and then click **Test Connection**.
3. Click **Update Settings**.



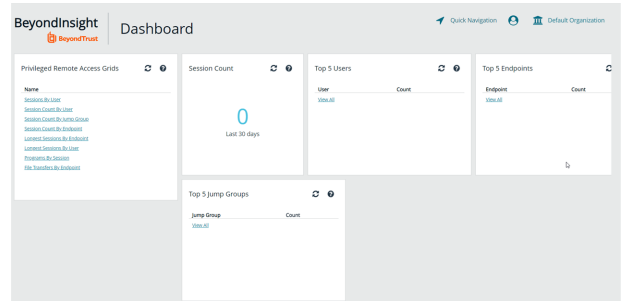
The screenshot shows the 'BeyondInsight Configuration' page. The breadcrumb trail is 'Secure Remote Access > Database Configuration'. The 'Database Configuration' section contains the following fields and controls:

- Server:** Text input field containing 'localhost'.
- Database Name:** Text input field containing 'BGSessions'.
- SQL User:** Text input field containing 'pra'.
- SQL Password:** Password input field with masked characters '.....'.
- Connection Timeout (seconds):** A numeric input field with '60', flanked by minus and plus icons.
- Query Timeout (seconds):** A numeric input field with '60', flanked by minus and plus icons.
- Another Query Timeout (seconds):** A numeric input field with '360', flanked by minus and plus icons.
- Test Connection:** A blue button.
- Update Settings:** A blue button.
- Discard Changes:** A grey button.

## View the Privileged Remote Access Dashboard

1. From the left menu in the console, click **Privileged Remote Access**.

- In the Dashboard you can quickly view a summary of Privileged Remote Access session data in each card.



- You can click the items within each card to review the specific records for that item in a grid view that can be sorted, filtered, and exported as required.

**BeyondInsight** | **Privileged Remote Access** | Sessions By User

Quick Navigation | Default Organization

### SESSIONS BY USER

Started filter: All dates | Filter by: [dropdown]

205 items

User	Started	Ended	Duration	Jump Group	Endpoint	
[blurred]	Dec 30, 2019, 8:54 AM	Dec 30, 2019, 11:50 AM	02:56:40	Development Environ...	[blurred]	[i]
[blurred]	Dec 29, 2019, 3:58 PM	Dec 29, 2019, 8:06 PM	04:08:35	Development Environ...	[blurred]	[i]
[blurred]	Dec 29, 2019, 1:49 PM	Dec 29, 2019, 3:14 PM	01:25:20	Development Environ...	[blurred]	[i]
[blurred]	Dec 29, 2019, 10:50 AM	Dec 29, 2019, 11:53 AM	01:02:30	Development Environ...	[blurred]	[i]
[blurred]	Dec 26, 2019, 7:45 PM	Dec 26, 2019, 7:49 PM	00:03:37	PI Pen Test	[blurred]	[i]
[blurred]	Dec 26, 2019, 7:43 PM	Dec 26, 2019, 7:45 PM	00:01:37	PI Pen Test	[blurred]	[i]
[blurred]	Dec 26, 2019, 6:42 PM	Dec 26, 2019, 6:47 PM	00:05:30	PI Pen Test	[blurred]	[i]
[blurred]	Dec 26, 2019, 2:00 PM	Dec 26, 2019, 2:00 PM	00:00:15	PI Pen Test	[blurred]	[i]

# Integrate the BeyondInsight API into Other Applications

You can integrate part of BeyondInsight's API into your applications using an API key.



**Note:** The **API Registration** page is only available to BeyondInsight administrators.

The ID and key are generated by BeyondInsight.

1. Select **Configuration > General > API Registrations**.
2. Enter a name for the registration.
3. Click **Create New API Registration** to create a new application registration.

BeyondInsight generates a unique identifier (API Key) that the calling application provides in the authorization header of the web request. The API Key is masked and can be shown in plain text by clicking the **Show Key** icon next to the **Key** field. The API Key can also be manually rotated, or changed, by clicking the circular arrow.



**Note:** Once the key has been changed, any script using the old key receives a "401 unauthorized" error until the new key is used in its place. Read access and rotation of the key are audited.

4. To configure a new registration or modify an existing one, select the registration, and then set the **Authentication Rule Options**.
  - **Client Certificate Required:** If enabled, a client certificate is required with the web request. If not, client certificates are ignored and do not need to be present. A valid client certificate is any client certificate signed by a certificate authority trusted by the server on which BeyondInsight resides.
  - **User Password Required:** If enabled, an additional authorization header value containing the **RunAs** user password is required with the web request. If not enabled, this header value does not need to be present and is ignored if provided. Square brackets surround the password in the header.

```
Authorization=PS-Auth key=c479a66f...c9484d; runas=doe-main\johndoe; pwd=[unlqu3];
```

- **Verify PSRUN Signature:** The PSRUN signature is an extra level of authentication. It is computed from the factors using a shared secret between the client and server. PSRUN sends the signature as part of the header during its API request. If enabled, the server recomputes the signature during factor validation and compares it against the one sent by the client. If the signatures match, the client's identity is considered verified. The signature effectively keeps the client in sync with the server. Changing the secret on the server requires the client to be rebuilt and guarantees that out-of-date clients cannot authenticate.
5. On the **Details** page, click **Add Authentication Rule** to create authentication rules. At least one IP rule, PSRUN rule, valid source IP address (IPv4 or IPv6), IP range, or CIDR from which requests can be sent for this API Key is required. Enter one IP address, IP Range, or CIDR per line.

X-Forwarded-For rules can also be created by providing a valid source IP address (IPv4 or IPv6), an IP range, or CIDR. In a load-balanced scenario, IP Authentication rules are used to validate the load balancer IP(s), and the X-Forwarded-For header is used to validate the originating client IP. Existing rules cannot be changed from an IP Rule to a X-Forwarded-For Rule or vice-versa. If an X-Forwarded-For rule is configured, it is required for the HTTP Request. If the X-Forwarded-For header is missing, the request fails with a *401 unauthorized* error.

6. Click **Create Rule**.

## Support and Product Updates

Click **Menu** in the left navigation toolbar, then **About**, to access support information and tools, product updates, and other resources including documentation links, version details, and the maintenance expiry date.

## Send Files to BeyondTrust Technical Support

You can build and send file packages containing general information for support and collected events.

### Create a Support Package

Create a support package that can be used by Support. The package includes:

- All logs in the BeyondInsight **Logs** folder
- Storage size statistics on the BeyondInsight database
- Certain database tables that contain information on scanner agents, and their jobs
- The **debug\_syncit - log** file used to determine when files are updated from Auto Update



**Note:** Credentials are not stored in any of the package files.

To generate the package:

1. From **Support Tools > Download Support Package**, click **Generate Support Package**.
2. A ZIP file is automatically created and saved to the **Downloads** folder.
3. Email the ZIP file to your support representative.

### Send Analysis Files

Additionally, you can send events collected by Analyzer to provide additional troubleshooting details such as:

- The number of errors collected in the BeyondInsight logs
- Analysis of the events, including percentages of types (processed and purged)
- The percentage of duplicate and timed out agents
- Analysis of BeyondTrust components
- Customer name

To generate analysis files:

From **Support Tools > Send Analysis to Support**, click **Send Analysis to Support**. This generates an analysis file and sends it to Support.



**Tip:** Analysis files are retained for 30 days. You can click a link on the **About** page to request that the data be deleted prior to the 30 day expiry.

## Download Updates

BeyondInsight ships with BeyondTrust Updater.

Using the update tool, you can set up subscriptions to download product updates for BeyondInsight, Event Server, and BeyondTrust Updater.

## Maintenance Information

This panel displays the contract **Maintenance Expiry Date** for BeyondInsight.

If your maintenance is close to expiry or has expired, a warning banner displays at the top of the Dashboard. The toggle **Hide Maintenance Expiry Warning Banner** can be set to on or off, to enable or disable this warning.



**Note:** *The **Maintenance Expiry Warning Banner** is only visible to administrators. Hiding the banner hides it from all administrators.*