

USER GUIDE

LEPIDE DATA SECURITY PLATFORM REPORTS

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1.Introduction

This guide is an introduction to running reports within the Lepide Data Security Platform. There are hundreds of pre-defined reports available for each of the different components within the Solution and these reports can be filtered, sorted, and searched as required. Reports can be scheduled to run automatically, saved, and exported for further analysis.

2. Types of Report

Reports are available under either **User & Entity Behavior Analytics** or **Permissions & Privileges** depending on which report you want to run.

3. Running a Report

For this example, we will look at the File Copied Report which is in the States & Behavior Analytics screen. To run the File Copied Report:

- Click the **User & Entity Behavior Analytics**
- icon
- Expand File Server Reports (from the tree structure to the left side of the screen)
- Expand File Server Modification Reports
- Click on File Copied to display the File Copied Report:

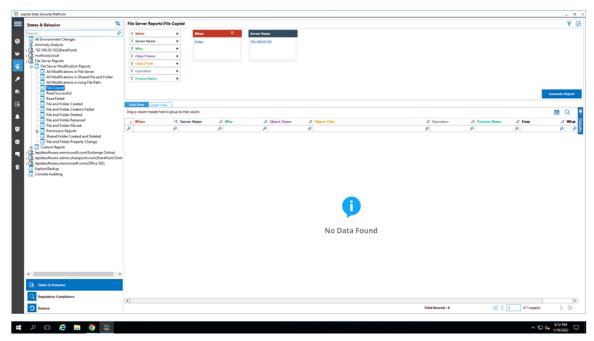


Figure 1: File Copied Report

To run this report, you need to specify a date range and server information:

Specify a Date Range

• From the top of the screen, under **When** click **Today** to choose a date range for the report The following dialog box is displayed:



Figure 2: Date Range Filter

• Select a date range from the list



• Click **OK** and you will return to the File Copied screen

Specify a File Server

• From the top of the screen under **File Server**, click to select the required file server:

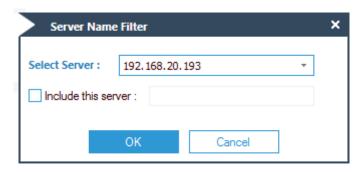


Figure 3: Server Name Filter

- Click OK
- Click Generate Report

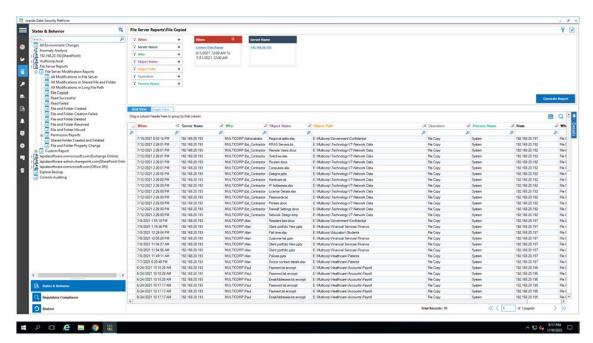


Figure 4: The Generated File Copy Report

3.1. The Details Window

To see summary information about selected data:

• Click on a row and details for that row will be displayed in the Details Window to the right-hand side of the screen:

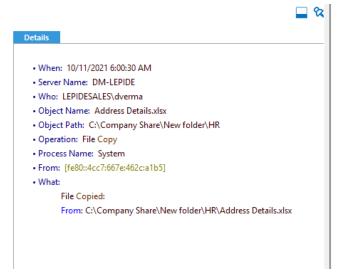


Figure 5: Details Window

To change the position of the Details Window to be displayed at the bottom of the screen:

• Click the **Show details in bottom icon** (found at the top of the Details window)

To change it back to the right-hand side of the screen:

• Click the **Show details in right icon**

To hide or display the Details Window:

• Click the **Hide or display details icon**

3.2. To Save a Report

• To save a report, click the **Save** icon (this is found in the area above the column headings)



The following dialog box is displayed:

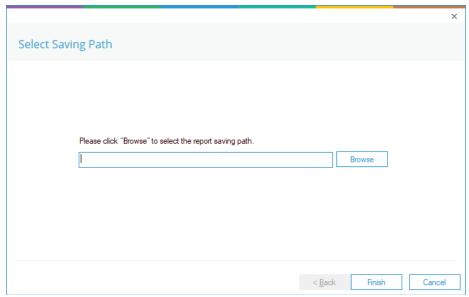


Figure 6: Save

• Click **Browse** to choose a location to save the report to

The **Save As** dialog box is displayed:

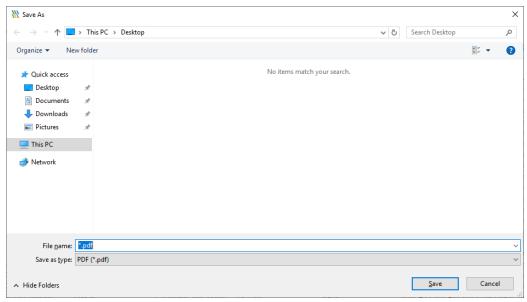


Figure 7: Save As

• Specify a **File Name** and choose a **File Type**



- The default file type is pdf but other options are csv and mht
- Click Save
- Click Finish

3.3. Searching Reports

• To find data within a report, click the **Find** icon (found next to the Save icon in the area above the columns)

The Find dialog box is displayed:



Figure 8: Find

- Type the text you want to find
- Choose whether to Match whole word only and/or Match Case
- Choose the **Direction** either up or down through the report
- Click **Find Next**The row containing the specified data will be highlighted.
- Click **Find Next** to find the next occurrence of the text
- Click **Cancel** to close the dialog box

3.4. Filtering Reports

There are three different ways to filter the reports which are explained as follows:

1. Using the Filter Icon

• Click the filter icon at the top of the column

This displays a dialog box where you can select/deselect whatever you want to filter by:

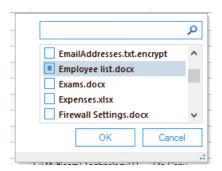


Figure 9: Filter List

The example above shows everything has been deselected except for Employee list.docx so the report will be filtered on Employee list.docx.

2. Typing Text into the Column Heading

Click on the filter area above the relevant column and type in the information you want to see.

For example, you may want to see data for a particular user - so click at the top of the **Who** column and type in the username:



Figure 10: Filter Area

In the example below, the report has been filtered to show both data for **Gemma** and where the file type is **txt.**

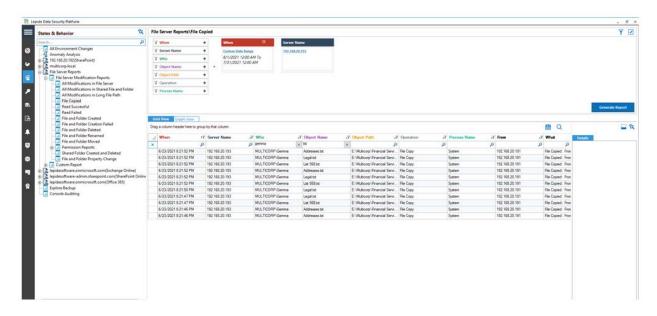


Figure 11: File Copy Report with Filtered Data

3. Using The Filter Boxes

These are displayed at the top of the report:



Figure 12: Filter Boxes

Click on the filter you require
 A dialog box will be displayed:



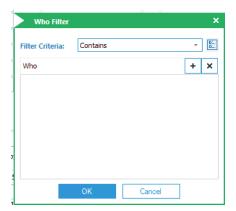


Figure 13: Who Filter

• Click the drop-down arrow to display the Filter Criteria options:

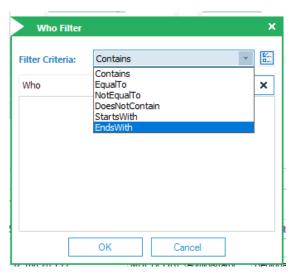


Figure 14: Filter Criteria

• Select the criteria and type the data

The example below shows filters for When, Server Name and Who:



Figure 15: Filters

3.5. Sorting Reports

• Click the column heading to sort the report by that column

3.6. Grouping Reports

Groups can be created within reports to make analysis easier. In the example below, the report has been grouped by user to clearly see all File Copying activity for each user:

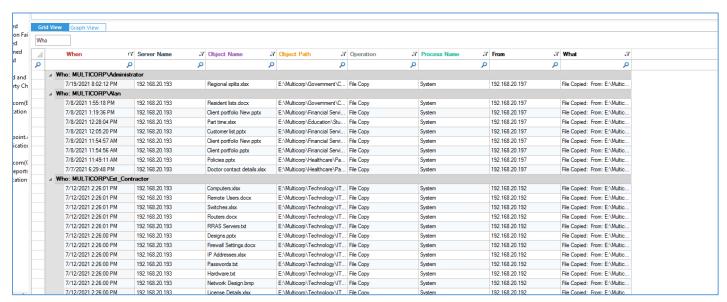


Figure 16: Report Grouped by User

Creating a Group

At the top of the column headings is an area for specifying groups. It displays 'Drag a column header here to group by that column':

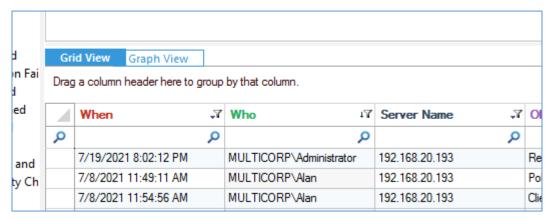


Figure 17: Group by Area of Report

• Drag the column heading you want to group by to this grouping area. The red arrows will be displayed when the column heading is positioned correctly.

• In the example below, the **Who** column heading has been dragged into the grouping area:

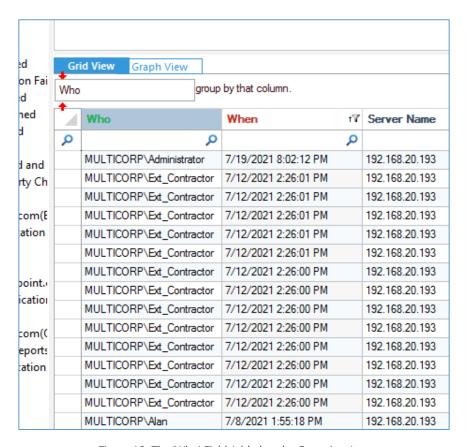


Figure 18: The 'Who' Field Added to the Grouping Area

The report is now grouped by User:

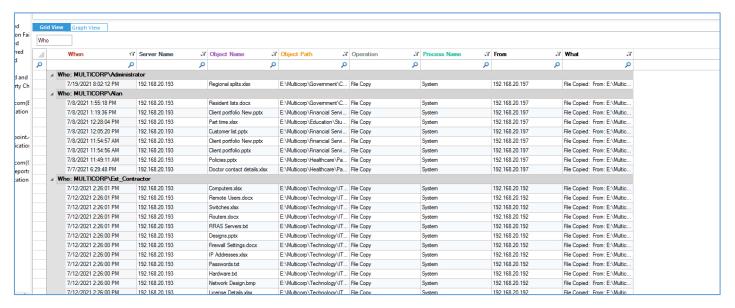


Figure 19: Report Grouped by User

To Remove the Grouping

 Drag the column heading back down to the row of column headings. The red arrows show when it's positioned correctly:

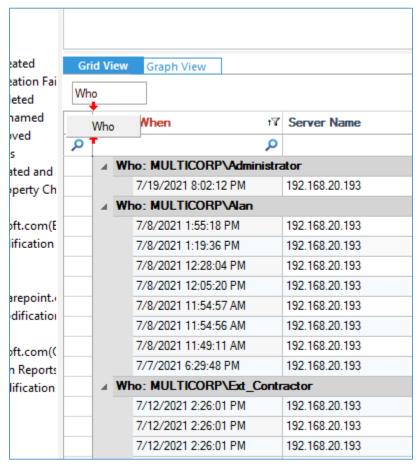


Figure 20: Remove Grouping

To Create Multiple Grouping Levels

- To create the first level of grouping, drag the column heading to the grouping area. In the example below, the first level is **When**.
- To create the second level, drag the column heading into the grouping area to the right of the first level heading. In the example below, **Who** is the second level.

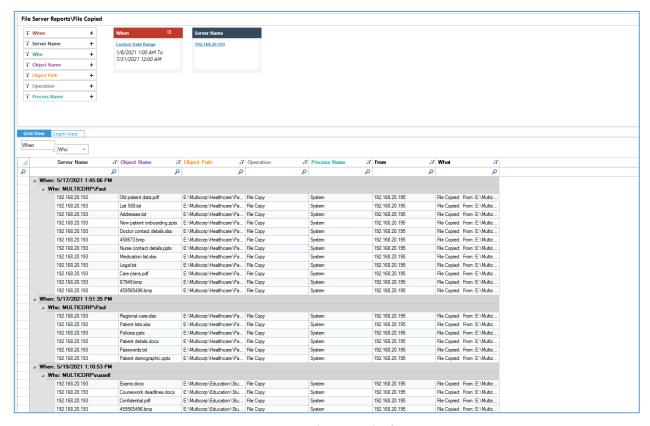


Figure 21: Report with Two Levels of Grouping

The column names used for grouping are shown in the grouping area with the levels displayed in a hierarchy.

4. Scheduling Reports

Setting up a schedule to automate the running of reports provides several advantages which include the following:

- Scheduling ensures that the information is delivered to the right users at the right time and in the correct format
- It minimizes manual intervention by users. If the running of a report is automated, it doesn't rely on anybody having to remember to run it, making the process accurate and efficient.
- Reports can be scheduled to run during off-peak hours therefore reducing the load on your network.
- Information can be distributed efficiently and consistently to the end-users giving them up-to-date information on the state of the system.

4.1. How to Create a Schedule for the Reports

All reports can be scheduled to run automatically. The following steps explain how to schedule the File and Folder Renamed Report, but the process is the same for all reports.

To set up a schedule:

- 1. Click the User Behavior Analytics icon
- 2. The States & Behavior screen is displayed with a list of all reports listed in a tree structure to the left side of the screen
- 3. Right click on the report you want to schedule and the context menu is displayed:

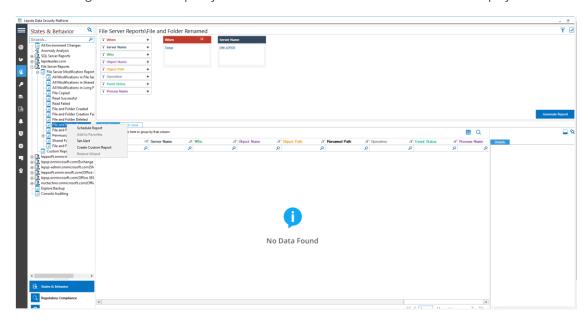


Figure 22: Schedule Report Menu

4. Choose **Schedule Report**

A wizard will start, and the Select Report(s) dialog box will be displayed:

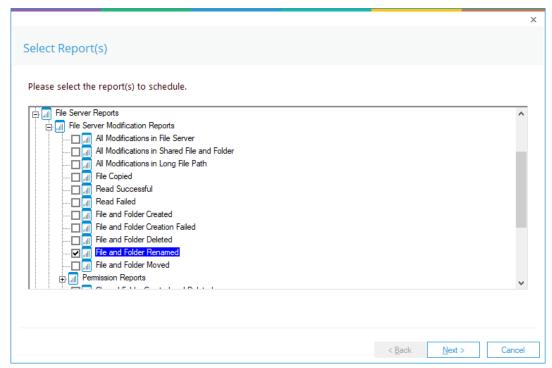


Figure 23: Select Reports

- 5. Ensure that the report(s) you want to schedule is/are selected. In this case, it is the File and Folder Renamed Report.
- 6. Click **Next**.

The Set Filter(s) dialog box is displayed:

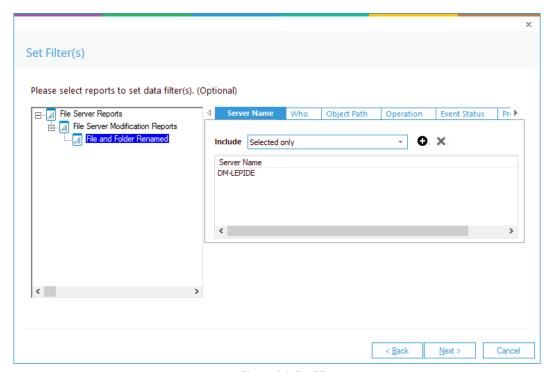


Figure 24: Set Filters

- 7. Here you can choose the filters for the report by selecting the different tabs at the top. Tabs include Server Name, Who, Object Path, Operation and Event Status and Process Name.
- 8. Click **Next**

The Report Delivery Settings dialog box is displayed:

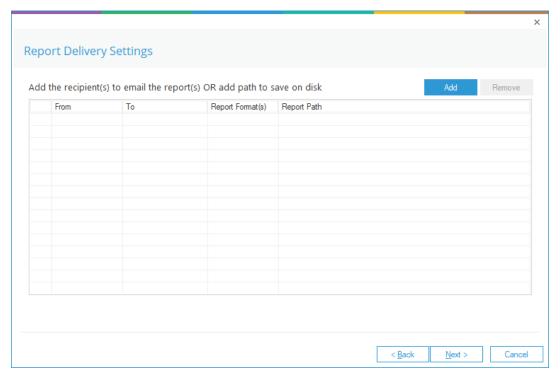


Figure 25: Report Delivery Settings

9. Click **Add**

The Configure Report Delivery Settings dialog box is displayed:

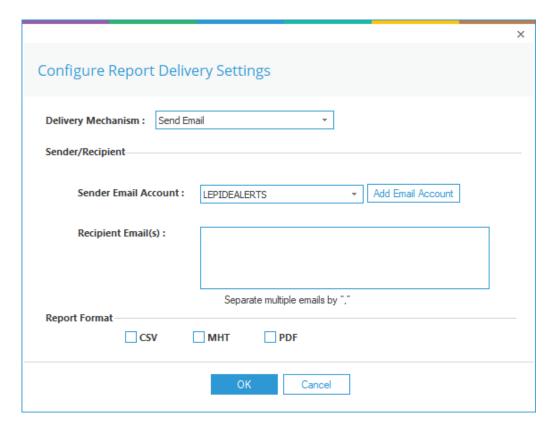


Figure 26: Configure Report Delivery Settings

Here you can specify how you want the report to be delivered.

Configure the Report Delivery Settings as follows:

Delivery Mechanism: Select either Send Email or Save Report on Disk

Sender/Recipient

Sender Email Account: Choose an email account from the drop-down menu or click Add

Email Account to add a new email account

Recipient Email(s): Add the recipient emails separated by a ','

Report Format: Select the format(s) required which can be **CSV**, **MHT** or **PDF**

Click OK when finished

10. Click **Next**

The Select Schedules dialog box appears:



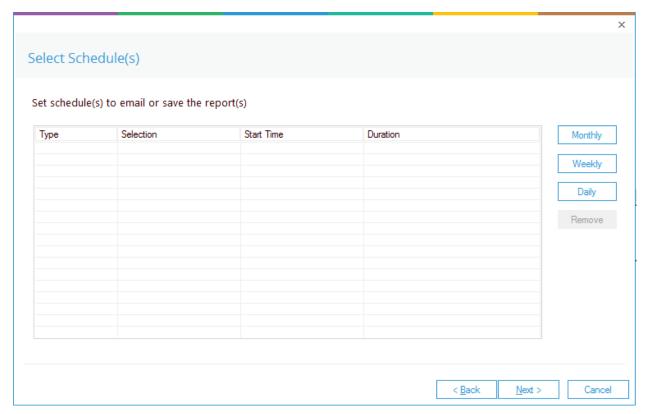


Figure 27: Select Schedule(s)

11. Select Monthly, Weekly or Daily to set a schedule

A dialog box is displayed. The example below shows the Monthly Schedule Settings:

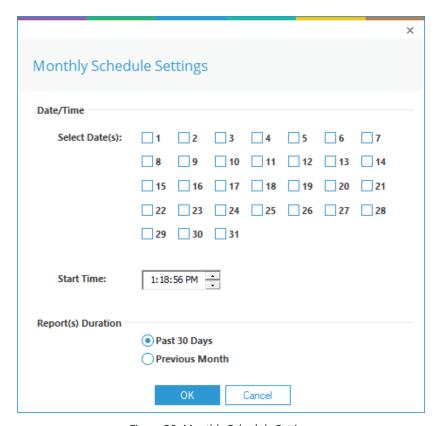


Figure 28: Monthly Schedule Settings

- Select the **Day** of the month, the **Start Time** and the **Report Duration**
- Click **OK**

The Confirmation dialog box is displayed:

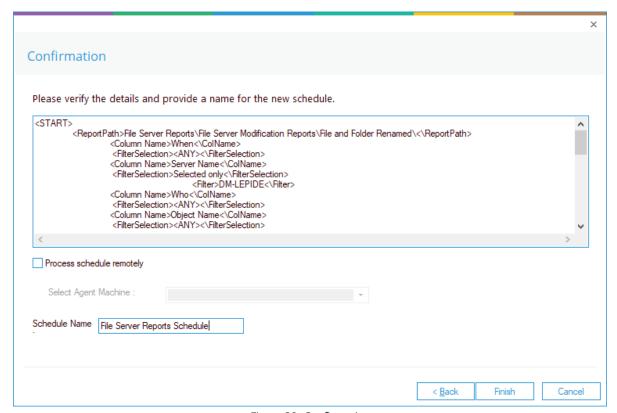


Figure 29: Confirmation

12. Enter a Schedule Name in the text box and click **Finish**.

4.2. To Display a List of Schedules

To see a list of schedules, click the Schedule Reports icon



The Names of the Schedules will appear to the lower left under Schedule Name in the Schedule Reports screen:

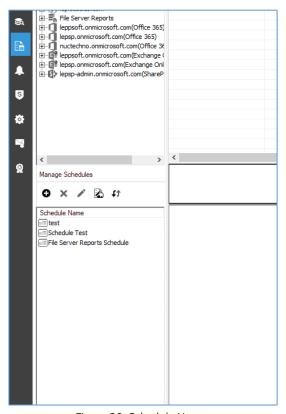


Figure 30: Schedule Names

4.3. How to Modify a Schedule

- From the Schedule Screen, click on a schedule name
- Click the Modify icon

The Select Report(s) dialog box is displayed:

This is the start of the Wizard used previously to set up the schedules

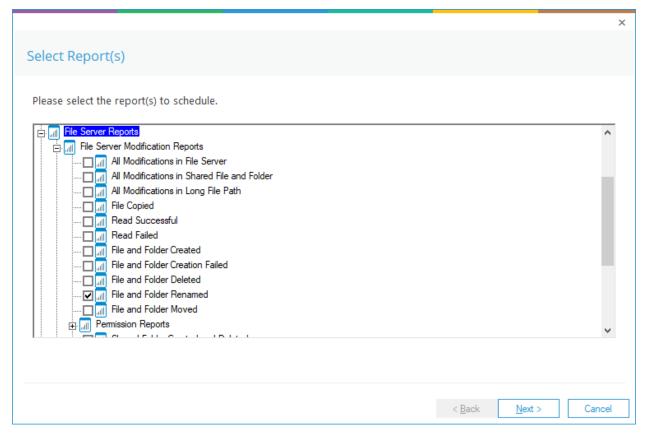


Figure 31: Select Report(s)

The steps of the wizard are the same as when setting up a schedule so please refer to page 20 of this document to continue working through these steps.

5. Support

If you are facing any issues whilst installing, configuring or using the solution, you can connect with our team using the below contact information.

Product Experts

USA/Canada: +1(0)-800-814-0578

UK/Europe: +44 (0) -208-099-5403

Rest of the World: +91 (0) -991-004-9028

Technical Gurus

USA/Canada: +1(0)-800-814-0578

UK/Europe: +44 (0) -208-099-5403

Rest of the World: +91(0)-991-085-4291

Alternatively, visit https://www.lepide.com/contactus.html to chat live with our team. You can also email your queries to the following addresses:

sales@Lepide.com

support@Lepide.com

To read more about the solution, visit https://www.lepide.com/data-security-platform/.

6.Trademarks

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