Lepide

Lepide Reports.

user guide.

Contents

1 Introduction 2
2 Reports 2
2.1 Running a Report 2
2.1.1 Specify a Date Range 3
3 Sorting a Report 4
4 Applying a Filter to a Report 5
4.1 Applying a Filter using the Filter Icon 5
4.2 Applying a Filter Using the Column Headings 10
5 Exporting a Report 10
6 Adding Reports to My Lepide 12
7 Creating a Customized Report 15
7.1 Edit a Customized Report 17
8 Remove, Move or Share a Report 18
8.1 To Remove a Custom Report 18
8.2 To Move a Custom Report 18
8.3 To Share a Report 19
9 Subscription 21
10 Support 26
11 Trademarks 26

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 Reports

2.1 Running a Report

From the Home Screen, choose a Lepide Category – this can be either Lepide Auditor, Lepide Trust, Lepide Detect or Lepide Identify. For this example, we will look at Lepide Auditor.

The Reports Window is displayed:

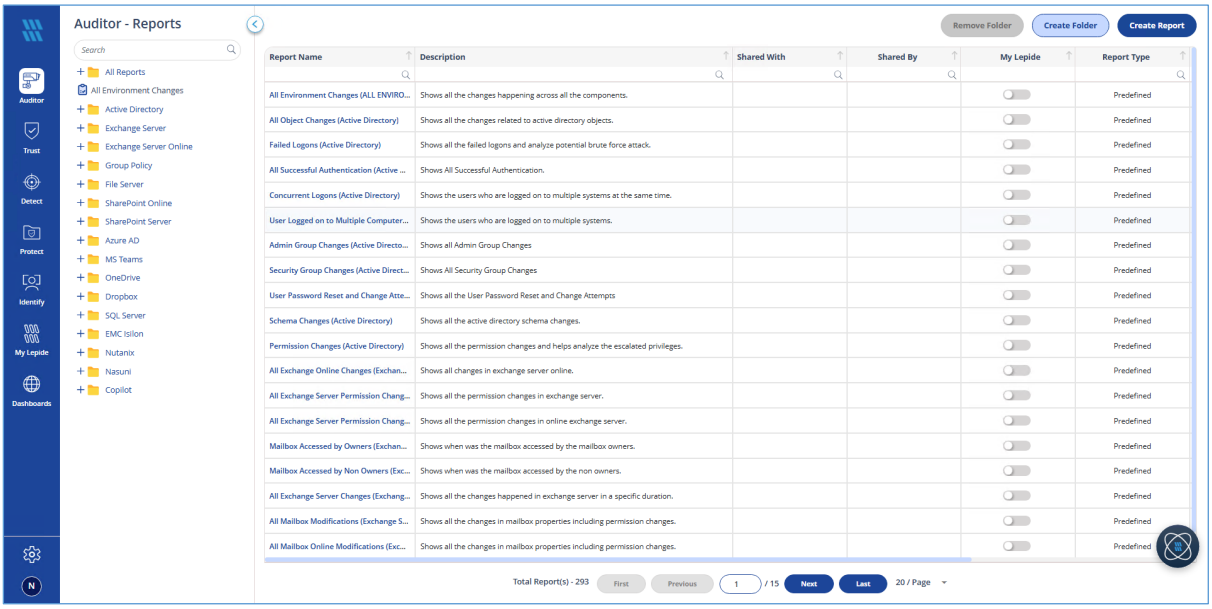

Figure 1: Reports Window

Here all reports available within Lepide Auditor are displayed.

- To see the reports within a folder, click the folder name – for example **File Server**
- To expand the list of reports within a folder, click the + icon

- To view a particular report, click the report name. In this example the **All File Server Interactions Report** has been selected:

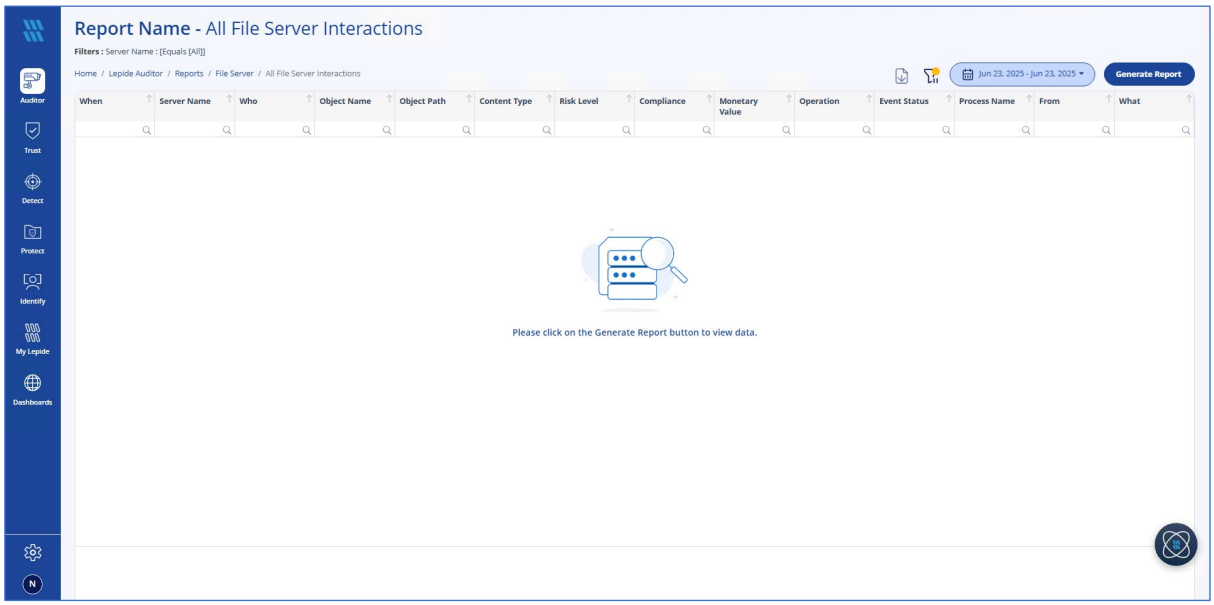

Figure 2: All File Server Interactions Report

2.1.1 Specify a Date Range

- From the top of the screen, click on the date to choose a date range from the list

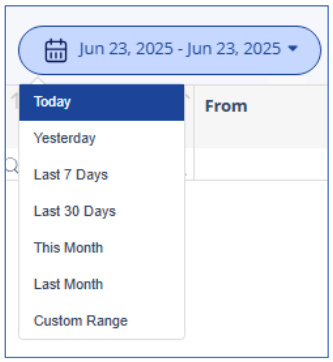

Figure 3: Date Range Filter

- Select a date range from the list

- Click the **Generate Report** button to run the report for the specified time period

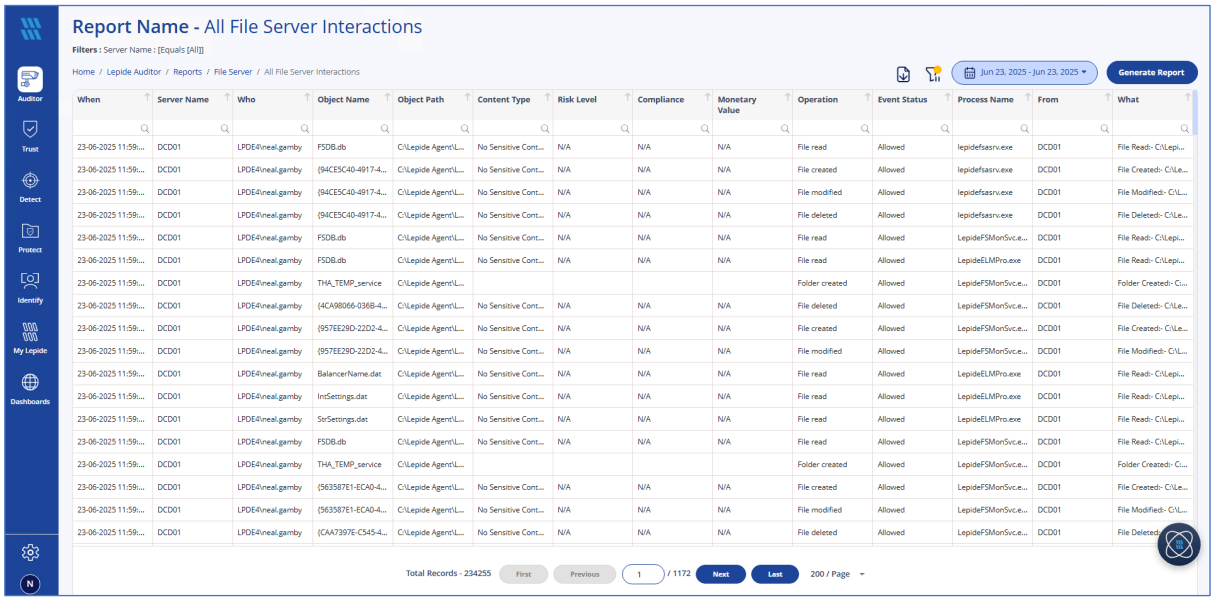

Figure 4: Generated File Server Interactions Report

3 Sorting a Report

Reports can be sorted by clicking the arrow next to the column heading. When clicked, the arrow changes to blue and shows in the direction of the sort.

Here the Operation has been sorted ascending (a-z) by Operation:

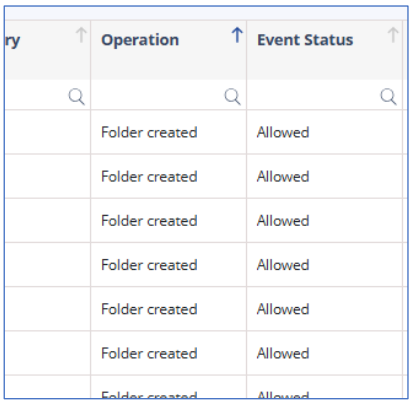

Figure 5: Sorting a Report

- Click the arrow again to sort descending (z-a)

4 Applying a Filter to a Report

There are two ways to apply filters using the Lepide Web Console and these are explained below:

4.1 Applying a Filter using the Filter Icon

- To apply a filter to the report, click the **Filter** icon:

The Modify Filters dialog box is displayed:

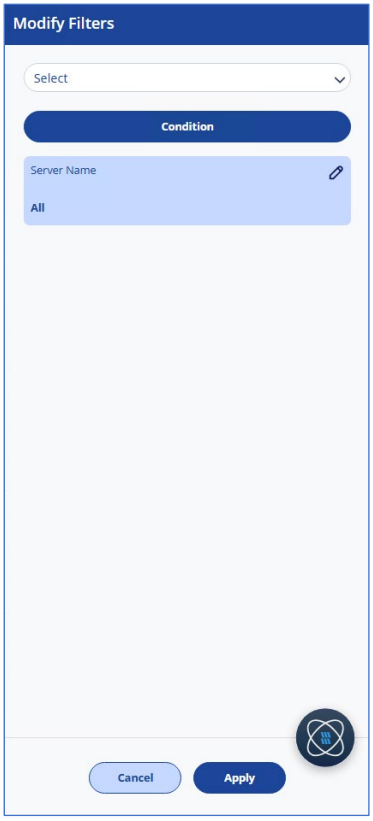

Figure 6: Modify Filters

- Click the **Select** drop down list to choose the column to filter by. In this example we will choose **Operation**

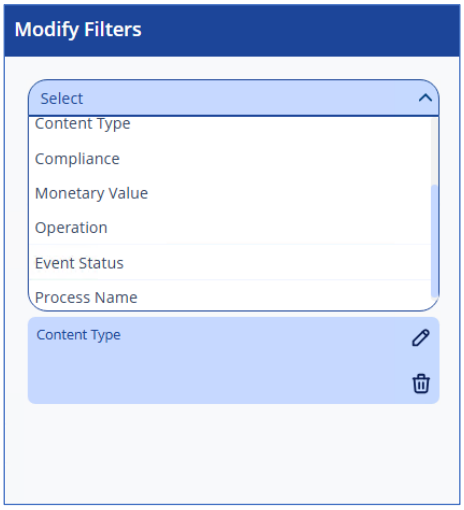

Figure 7: Choose a Column to Filter By

Operation now appears in the dialog box with blue highlight:

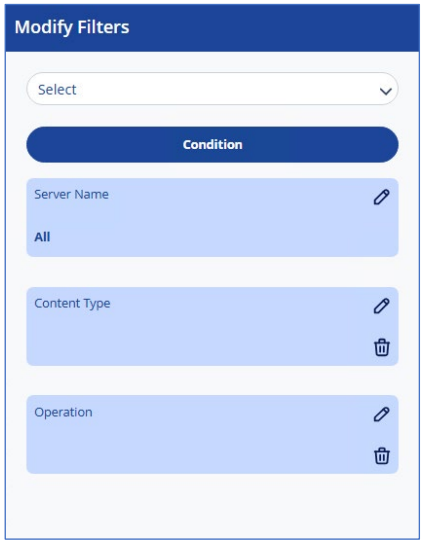

Figure 8: Filter Shows with Blue Highlight

- Click the **Edit Filter** icon next to the relevant column name (highlighted blue)

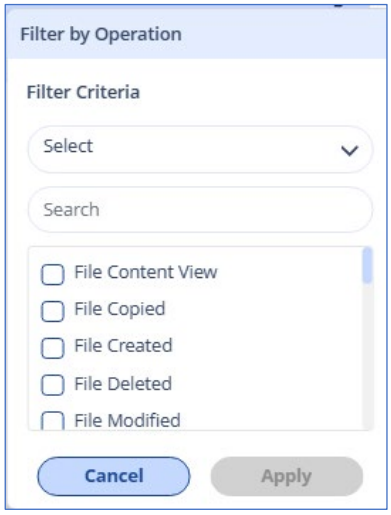

Figure 9: Filter Criteria

- Click the **Select** drop down and choose from the criteria options available. In this example, we are filtering by Operation and so can choose between **Include** or **Do Not Include:**

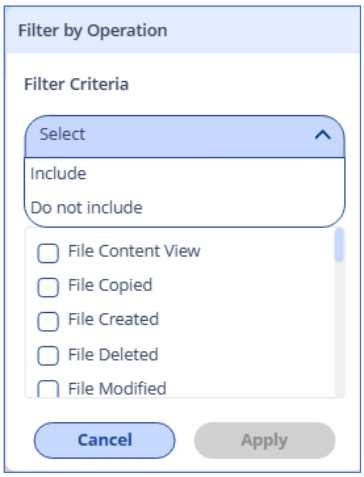

Figure 10: Filter Condition

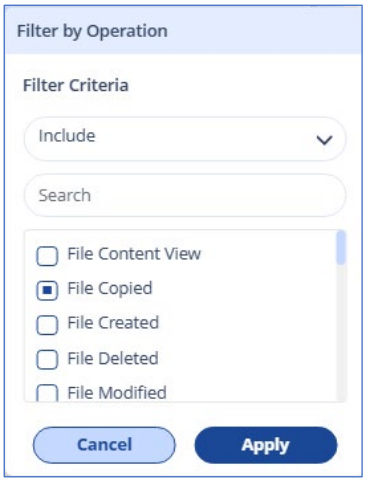

Figure 11: Select the Column(s) to Filter By

1. Choose the column(s) you want to filter by. In this example, we will filter by File Copied
2. Click **Apply**
3. Click **Generate Report**

4. The report will run and will display the filtered data:

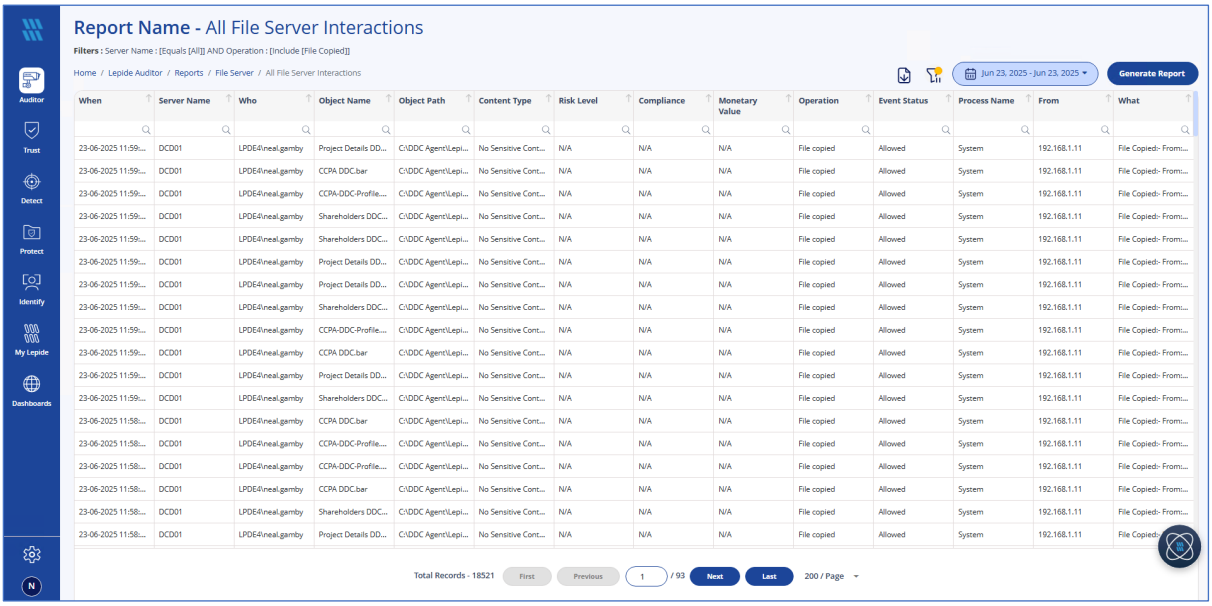

Figure 12: File Server Interactions Report with Filter

In the example above, a filter for File Copied has been applied and the details of this filter are shown at the top of the screen:

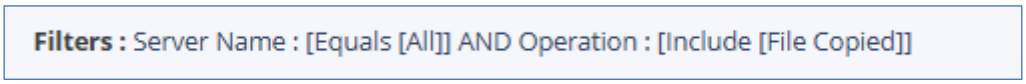

Figure 13: Details of the Filter Applied

- To change the filter, click again on the Filter icon and the Modify Filters dialog box is displayed

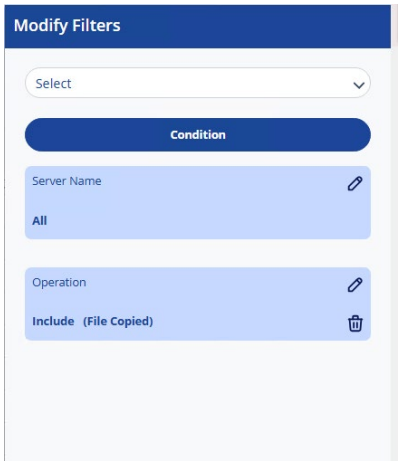

Figure 14: Modify Filters

- Make the changes as required, then as before, click **Apply** and then **Generate Report**
- To remove a filter, from the Modify Filters dialog box click the icon.

4.2 Applying a Filter Using the Column Headings

Filters can be added by typing directly into the column heading. As you type, the report will display the filtered data.

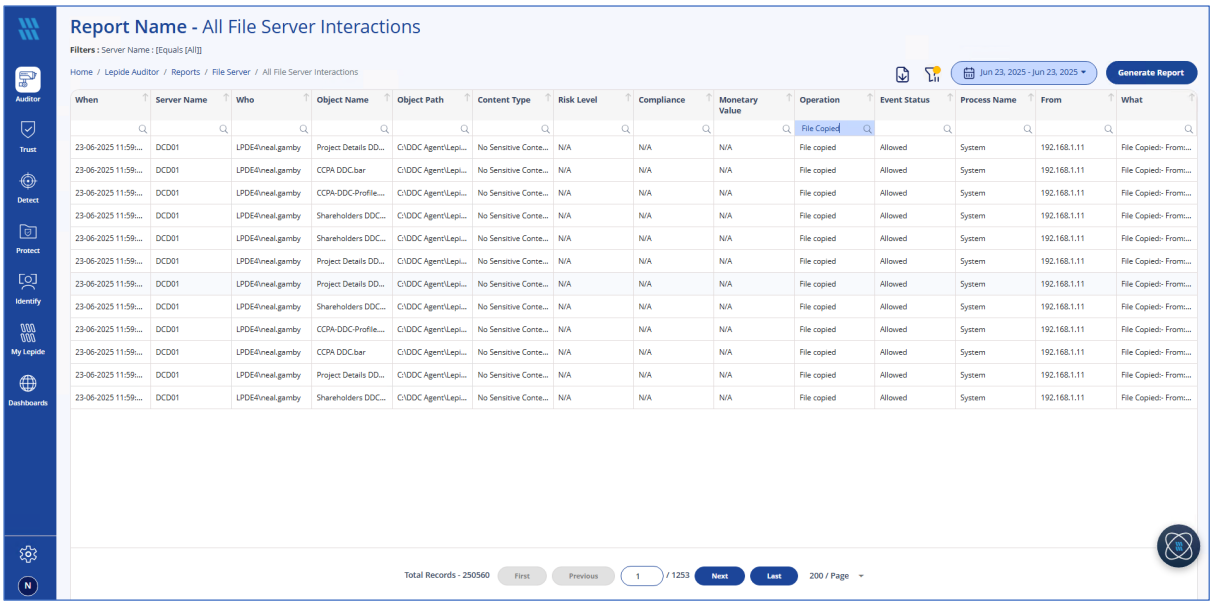

Figure 15: Filter Applied Using Colum Heading

In the example above, **'File Copied'** has been typed into the **Operation** column to filter by **File Copied**

5 Exporting a Report

Reports can be exported to CSV and PDF file formats. Exporting to CSV will be instant whereas the PDF option will take longer as it has the formatting to export as well as the data.

To export a report:

From the Reports screen, hover over the **Export** button and a menu will be displayed:

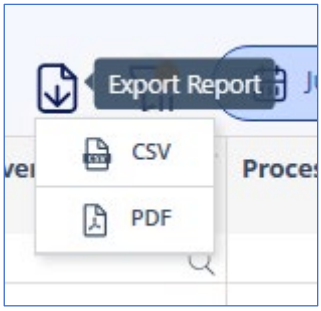

Figure 16: Export Options

- Choose either **CSV** or **PDF** from the menu

A message is displayed:

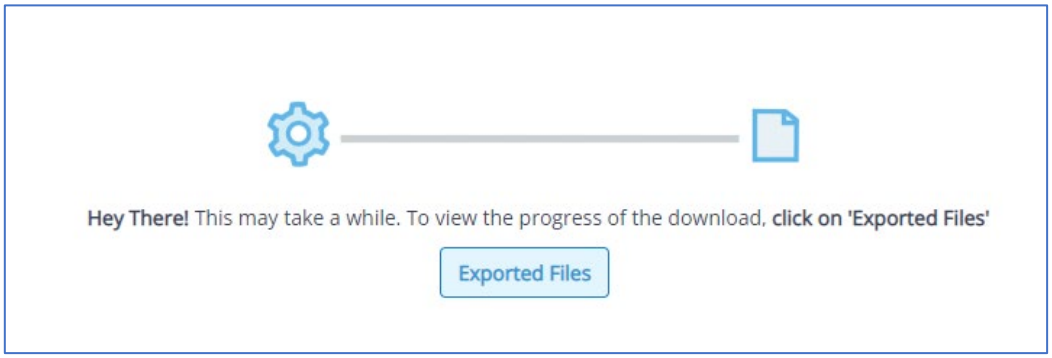

Figure 17: Export to PDF Message

- Click on the **Exported Files** button to see the progress of the export and to see the exported file once the process is complete

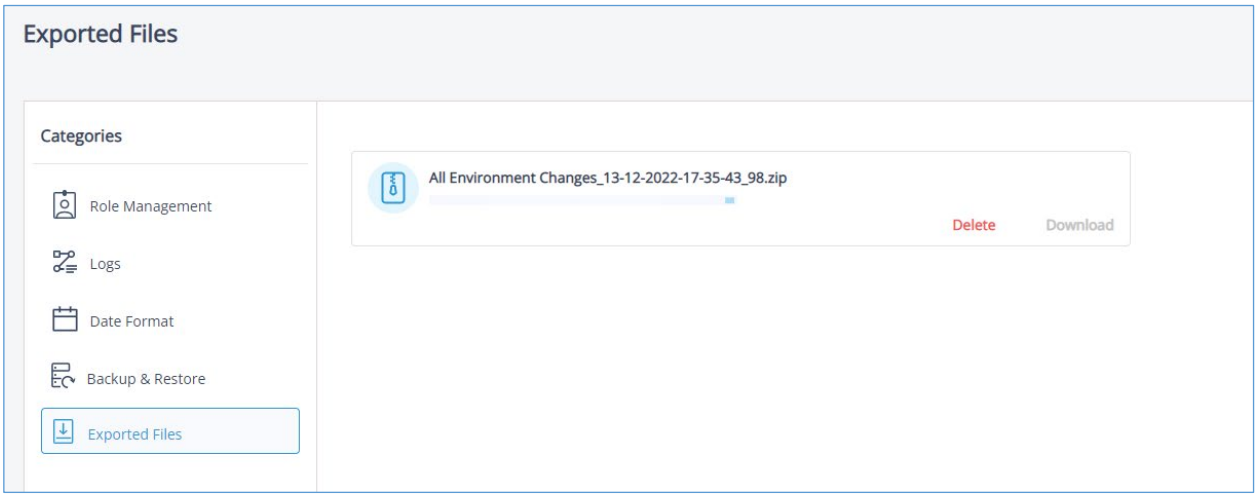

Figure 18: Exported Files

6 Adding Reports to My Lepide

The **My Lepide Dashboard** on the home screen lists any reports and dashboards that you have added to **My Lepide**, providing an easy way to find and run the reports you use frequently. Any report can be added to **My Lepide** whether it is a predefined report or a custom report.

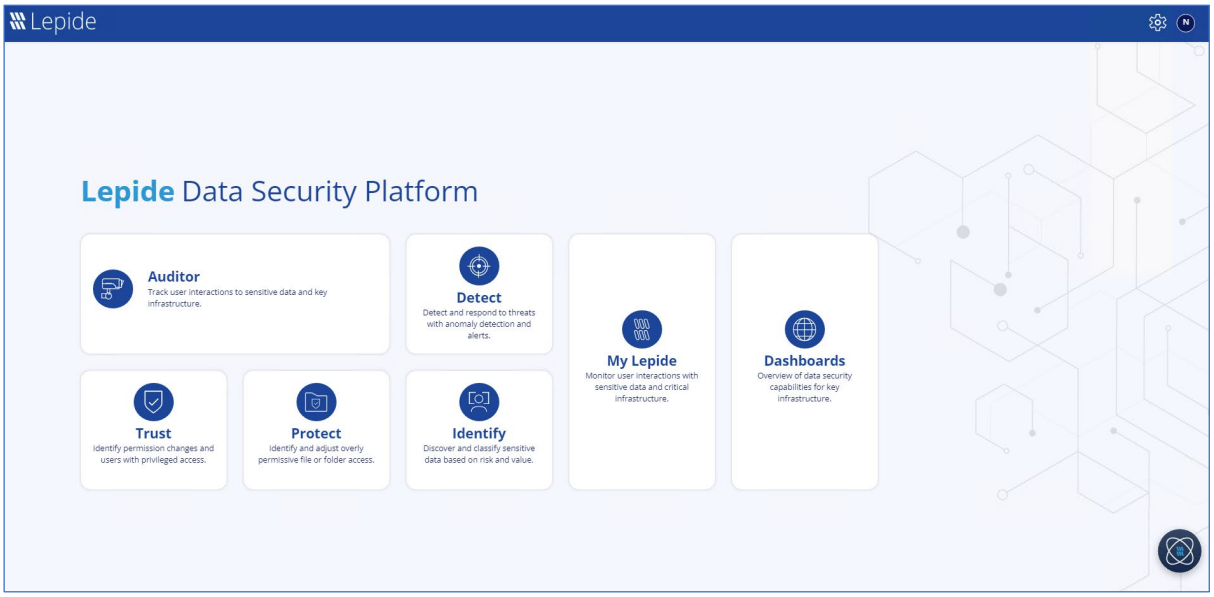

Figure 19: Home Screen

To add a Report to **My Lepide**:

- From the Home Screen, choose a Lepide Category, for example, **Lepide Auditor**
- The Lepide Auditor Dashboard screen is displayed
- From the top of the screen, choose a category, for example, **Lepide Auditor** and select **Reports**

The Reports screen is displayed:

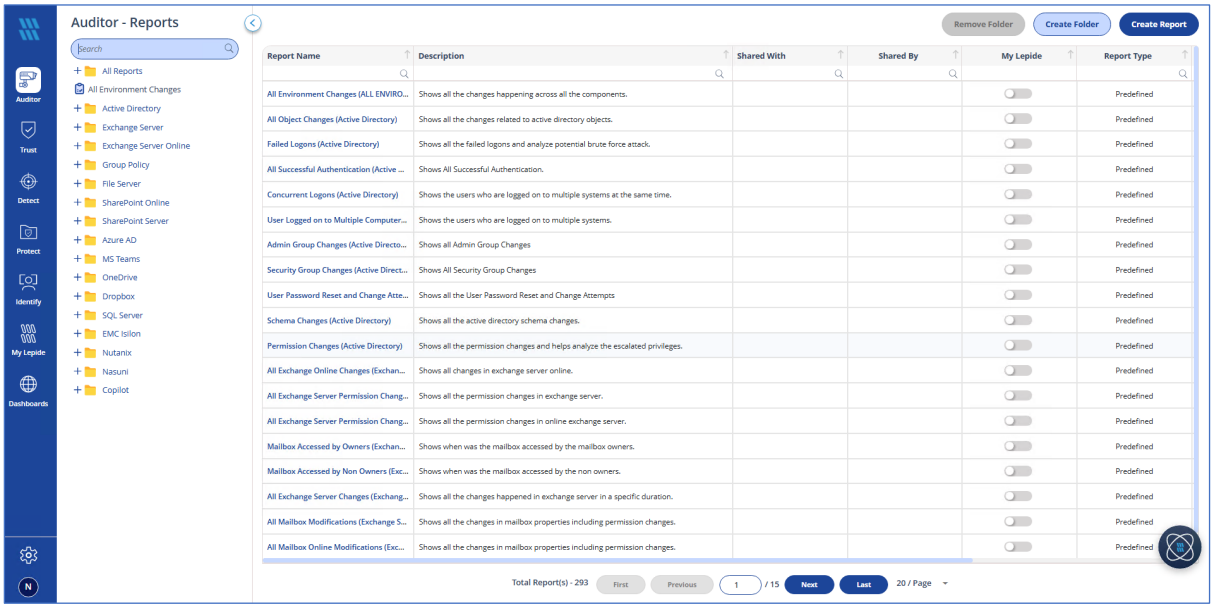

Figure 20: Reports Screen

- Find the report you want to save to **My Lepide**
- Slide the icon in the My Lepide column to the right to add the report to the My Lepide Dashboard
- A message will be displayed at the top of the screen showing that the report has been added to My Lepide and the icon will show as activated as it will now be dark blue:

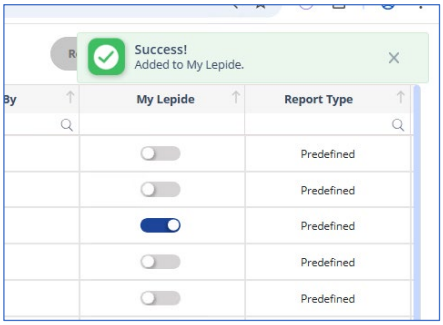

Figure 21: Report Added to My Lepide

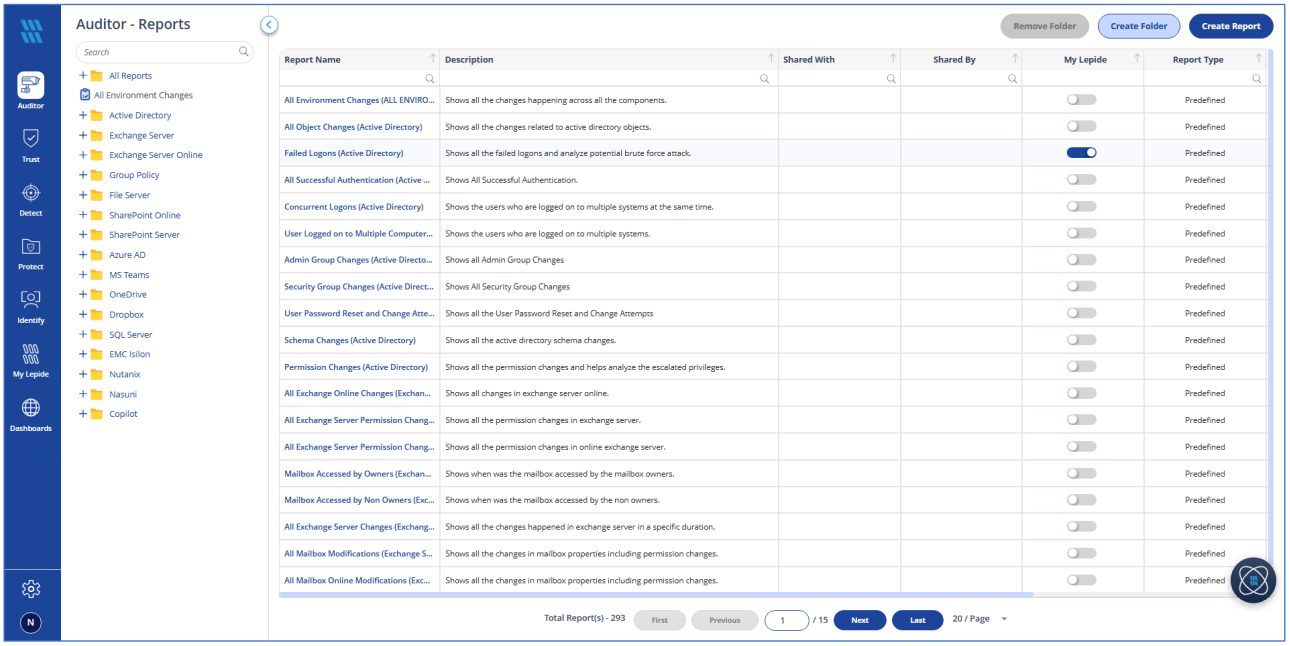

Figure 22: Report Added to My Lepide

In the above example, the **Failed Logons Report** has been added to **My Lepide**. This can be seen as the icon will show as activated as it will now be dark blue.

- Repeat this for all reports you want to be available from **My Lepide**

Now your report(s) will be displayed when you choose **My Lepide** from the menu bar to the left of the **Reports** Screen or from the option on the **Home** screen:

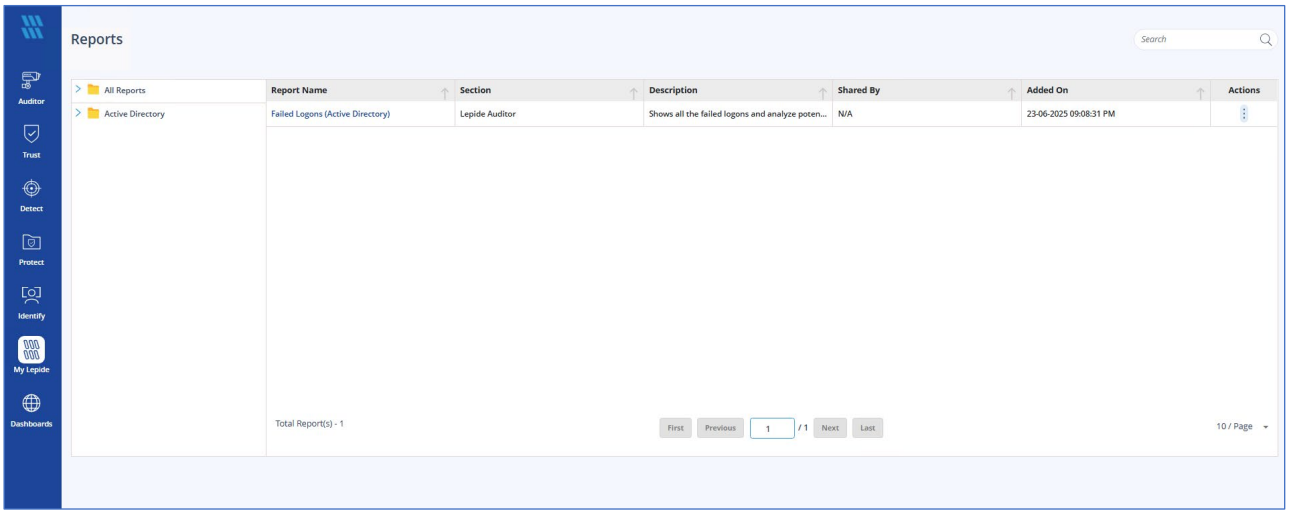

Figure 23: My Lepide Reports

7 Creating a Customized Report

Custom reports can be created so that you can choose the columns you want to see and the filters you need to apply. The report can be saved and run as required.

To create a custom report:

- From the **Home** screen, choose a Lepide Category, for example, Lepide Auditor

The Auditor - Reports screen is displayed:

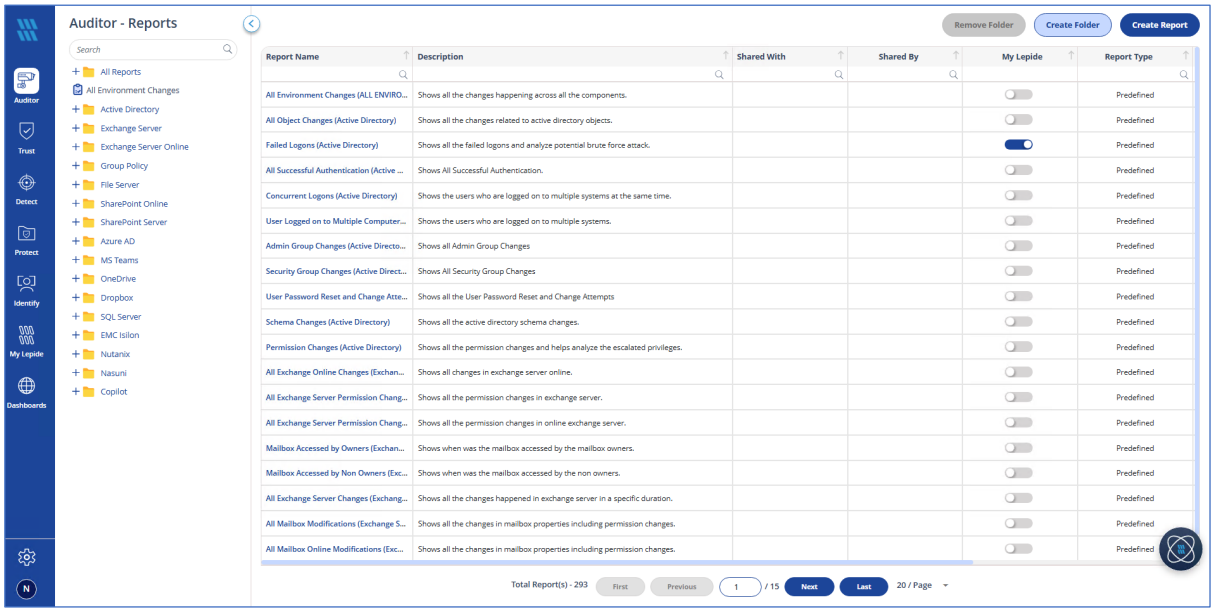

Figure 24: Reports Screen

- To create a report, click the **Create Report** button on the top right of the screen

The Create Report dialog box is displayed:

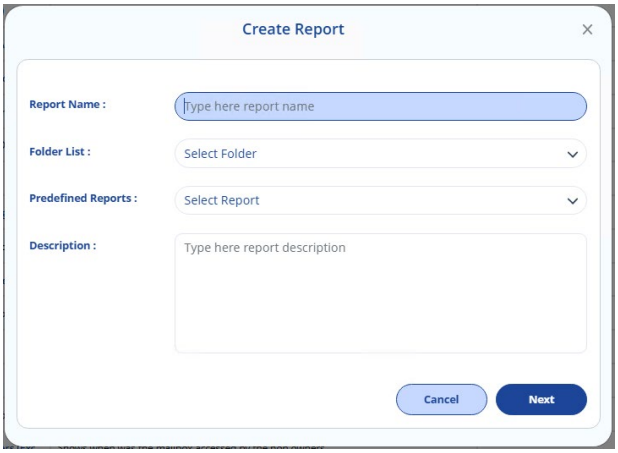

Figure 25: Create Report

- Enter a Report Name
- Select from **Folder List** the Folder which contains the pre-defined report on which you are basing this customized report. Your customized report will be stored in this folder. For the Files Copied Report, the folder is File Server.
- Select from **Predefined Reports** the Predefined Report that this customized report is to be based on
- Add an optional **Description**
- Click **Next**

The **Report Editor** screen is displayed with the report name at the top:

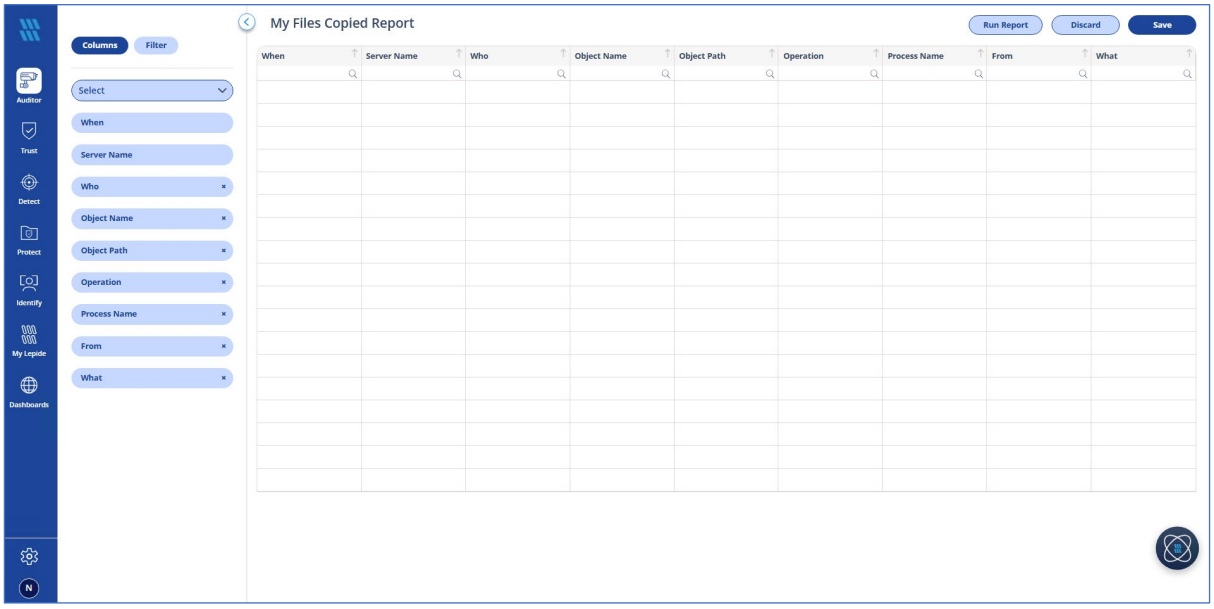

Figure 26: Report Editor Screen

The columns are those used in the predefined report (selected previously in the Create Report dialog box) which this custom report will be based on.

To the top left of the screen are two Tabs: **Filter** and **Columns**

With the **Columns** Tab selected there are column headings at the top and to the side of the screen. The column headings at the side can be used to **remove columns** by clicking the x icon and **change the order** of columns by dragging them to a new position.

In this report example, the fields **When** and **Server** Name cannot be removed as they are integral to the running of the report.

- To reinstate a previously deleted column name, click the **Select** drop down menu and choose the column name
- Click the **Filter** tab to add filters for the report. For more information about adding a filter, please refer to Section 6 of this guide
- When finished, click **Save.** This will save any changes you've made to the columns or filters and you will return to the Reports screen
- Choose **Generate Report** to run the report

The report will be stored in the folder you specified in the Create Report dialog box and will be saved with all the customized options you have chosen

7.1 Edit a Customized Report

- To make changes to a customized report, click the Customize Report icon (next to the Filter icon)

This takes you to the Report Editor screen

This will show your customized report with the columns and filters you specified previously

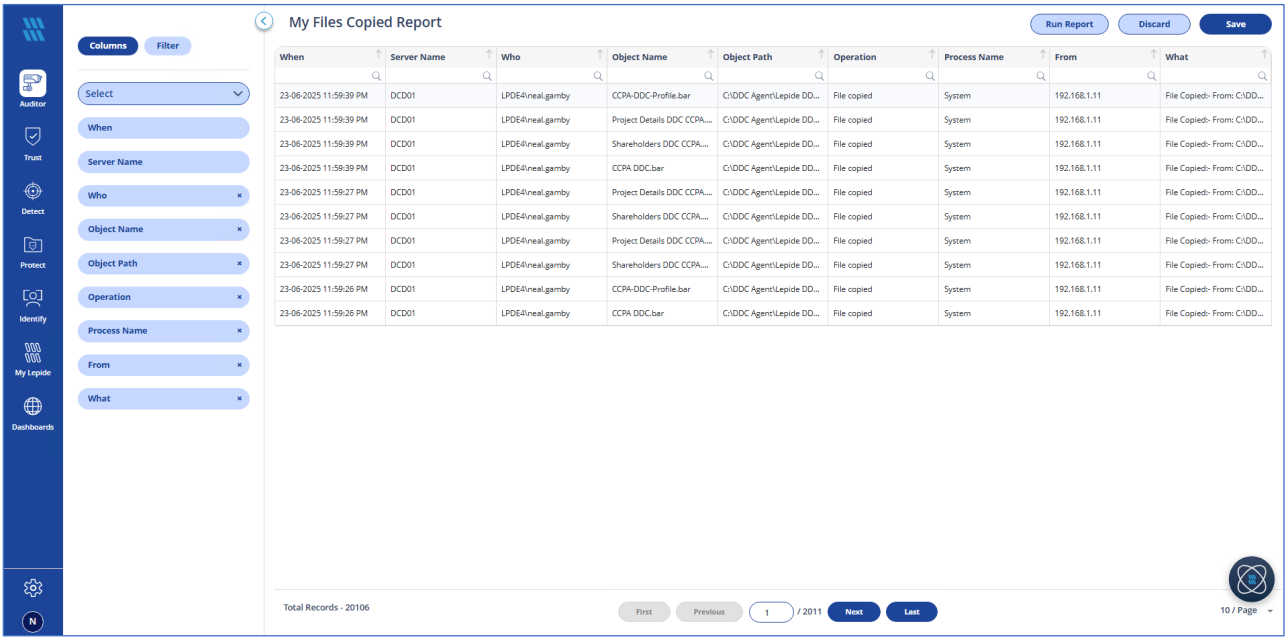

Figure 27: Edit a Customized Report

- Make changes as required
- Click **Save** when finished

8 Remove, Move or Share a Report

Custom reports can be removed, moved or shared while predefined reports can be shared

8.1 To Remove a Custom Report

From the Reports screen, next to the report that you want to remove, click the icon

This menu option to Remove, Move or Share the report will appear

Figure 28: Remove, Move or Share

- Choose **Remove**

The following dialog box will appear:

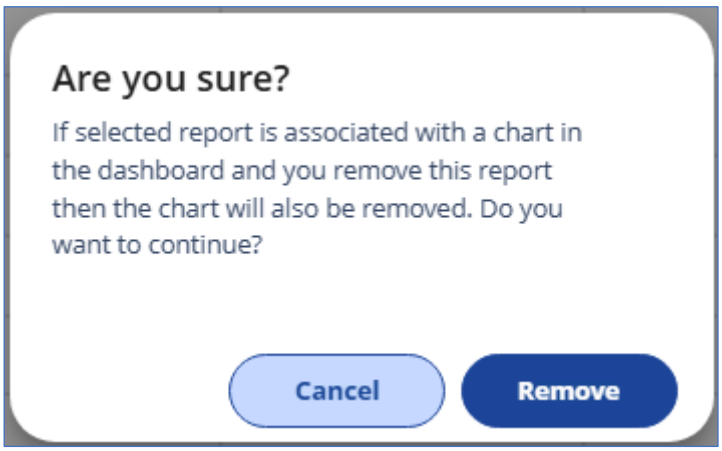

Figure 29: Confirmation to Remove a Report

- Click **Remove** to remove the report

8.2 To Move a Custom Report

- Click the icon and choose **Move Report**

The Select a Folder dialog box is displayed:

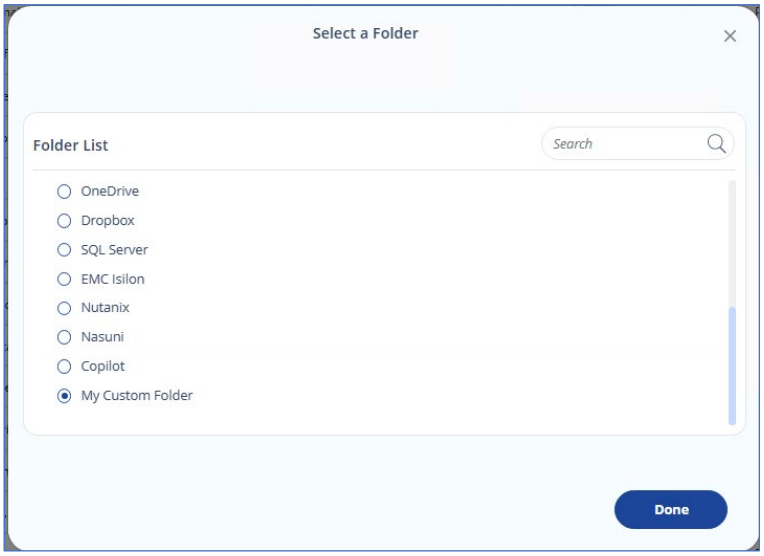

Figure 30: Select a Folder

- Select the folder to move the report to
- Click **Done**

8.3 To Share a Report

- Click the icon and choose Share Report

The Select User(s) or Group(s) dialog box appears:

Figure 31: Select Users or Groups

- Select **Browse Group(s)** or **Browse User(s)** and click the Select User/Group button

A list of users or groups will be displayed:

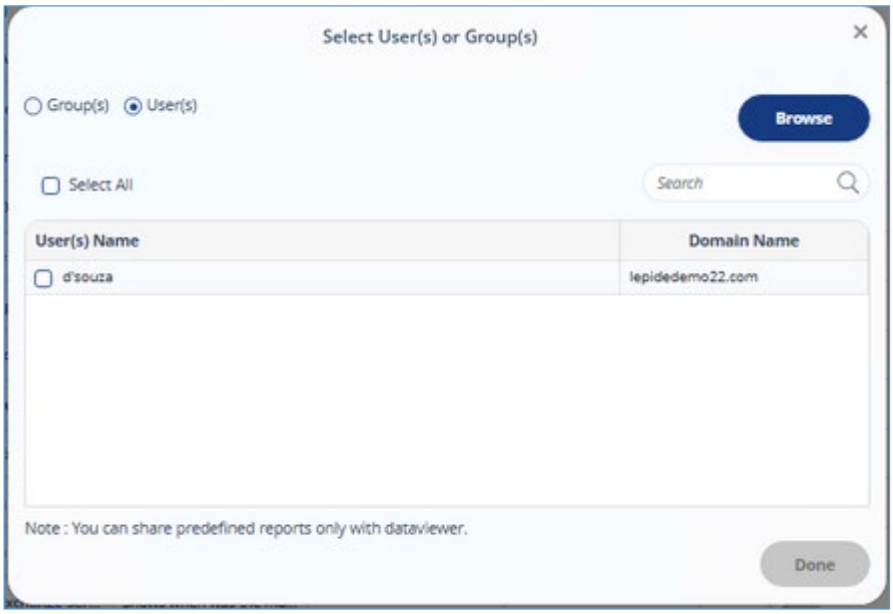

Figure 32: Select the User(s)

- Select the user(s) to share the report with and click **Done**

A **Successfully Shared** message box will be displayed.

- Click **Done**

The Share information is shown in the Reports screen under **Shared With** and **Shared By**

In this example the Failed Logons report was shared with Jill by Paul:

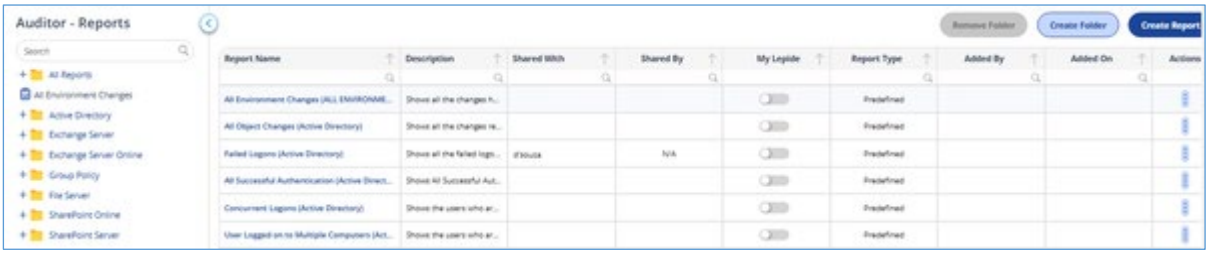

Figure 33: Share Information

9 Subscription

Subscribing to a report enables the automated, regular execution of the report, eliminating the need to manually run it each time.

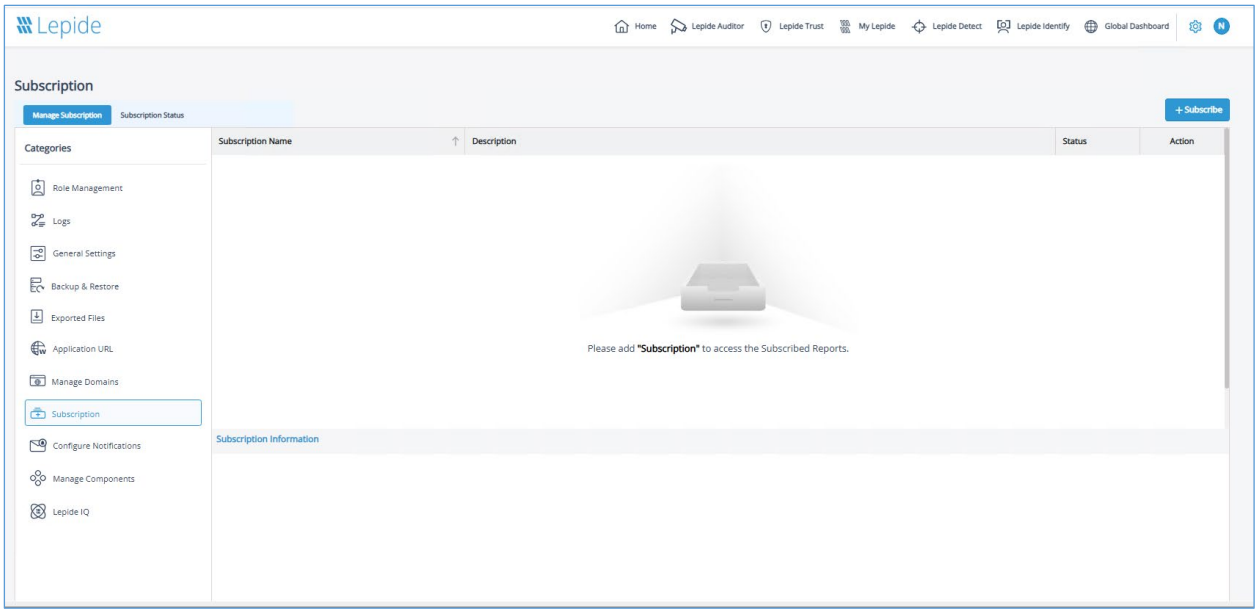

Figure 34: Subscription

- To add a subscription, from the Admin Console, click the **Subscribe** button

  The **Add Subscription** wizard will start:

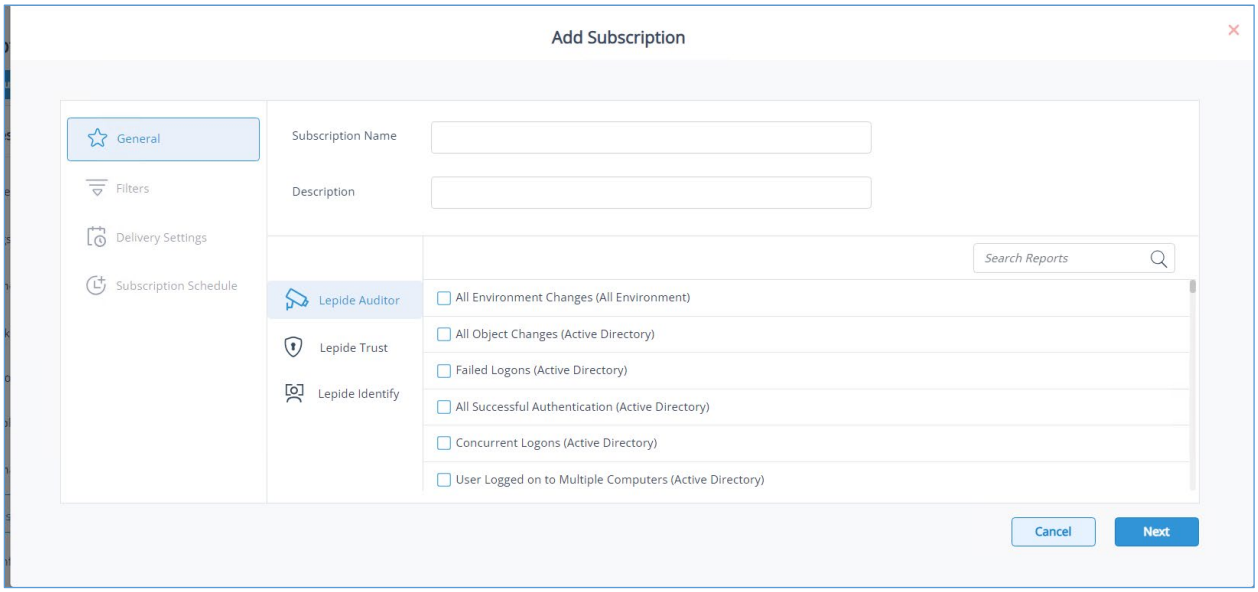

Figure 35: Add Subscription - General

- Add the Subscription Name and Description
- Select the reports to subscribe to:

– To search for reports, click in the **Search Reports** box and type all or part of the report name to see a list of relevant reports:

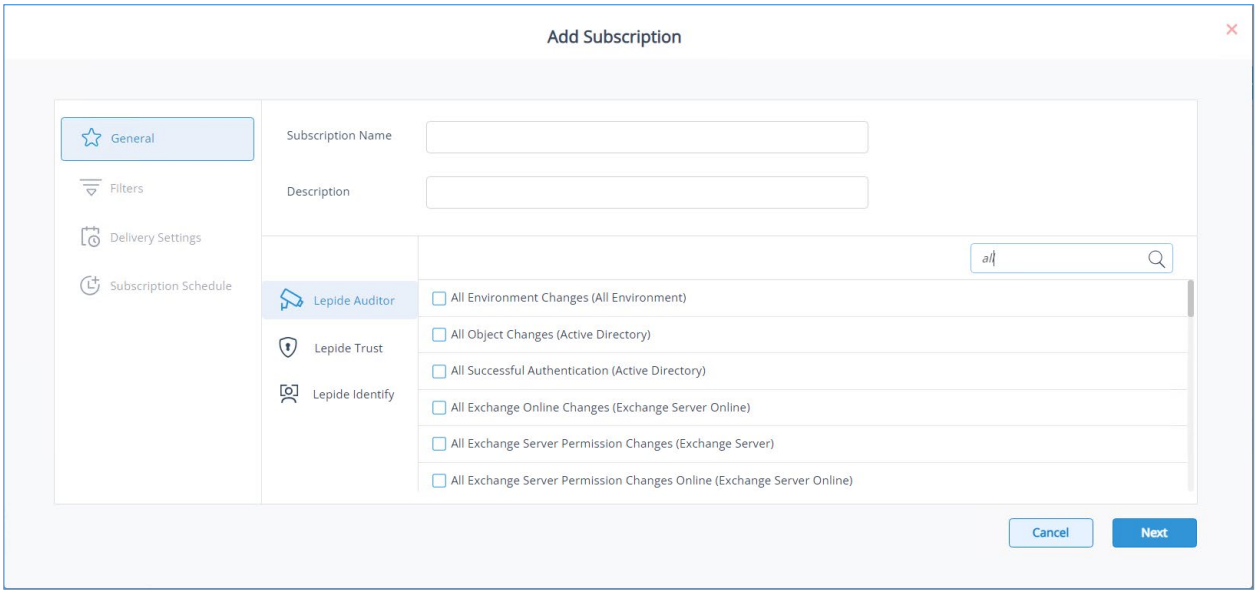

Figure 36: Search Reports

– To see the reports for each Lepide category, select either **Lepide Auditor**, **Lepide Trust** or **Lepide Identify**:

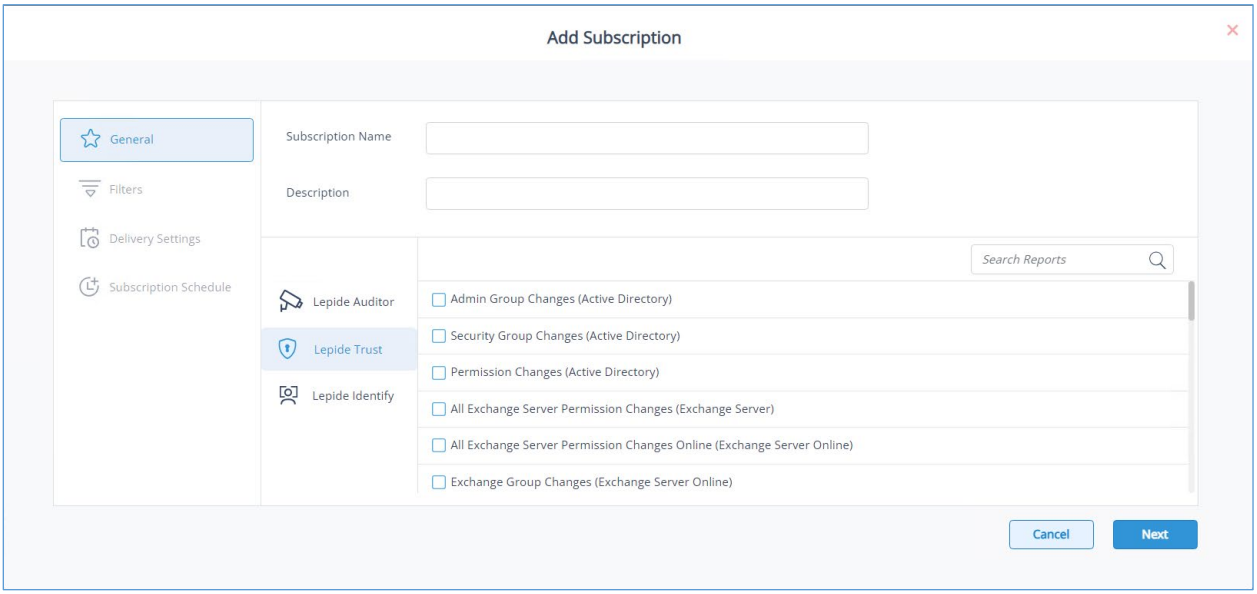

Figure 37: Select Lepide Category

- Once one or more reports have been selected, click **Next**

The Filters window is displayed:

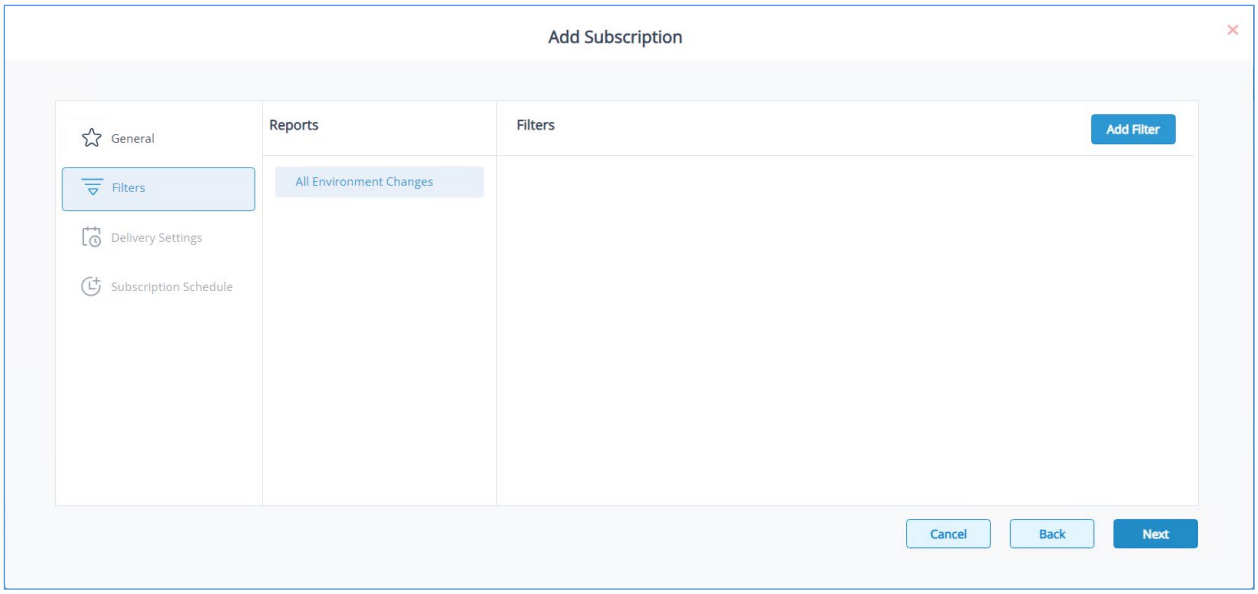

Figure 38: Add Subscription - Filter

- Click **Add Filter** to add a filter for the selected report:

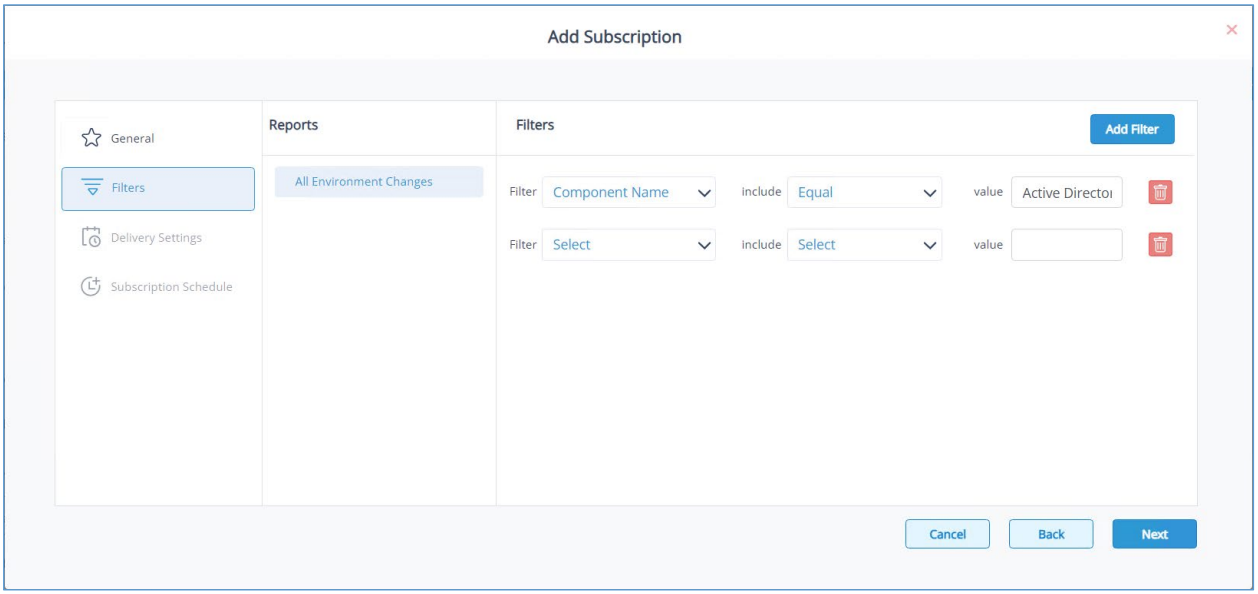

Figure 39: Add Filter

- Click **Next**

The Delivery Settings window is displayed:

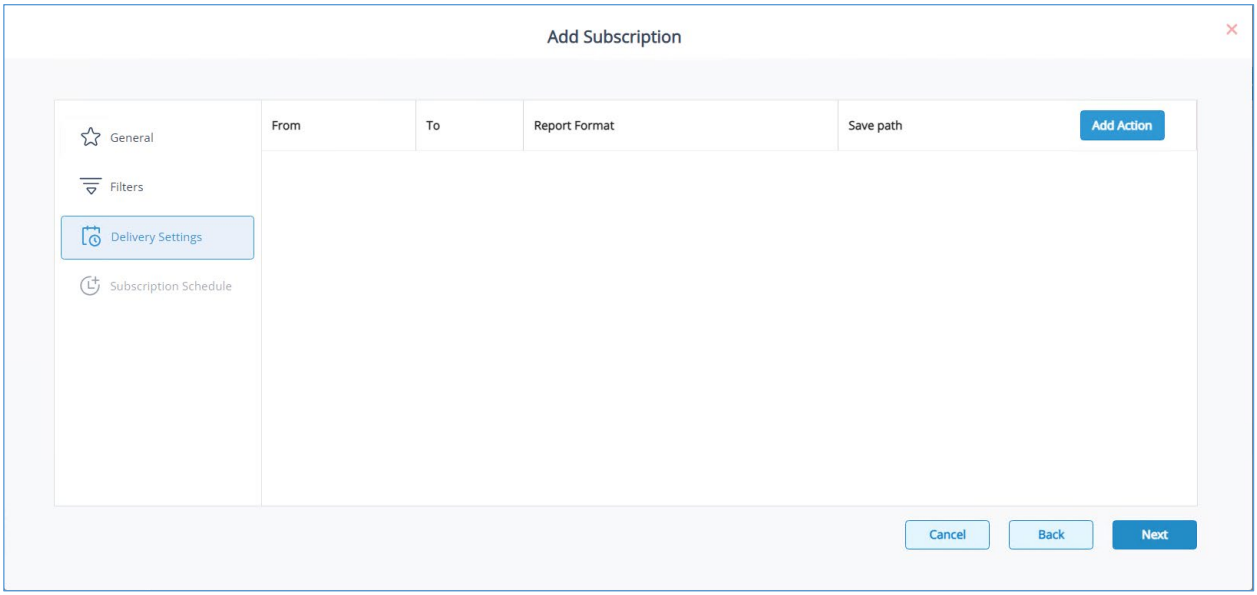

Figure 40: Delivery Settings

To specify the settings for how the reports should be delivered:

- Click **Add Action**

  The Configure Report Delivery Action window is displayed:

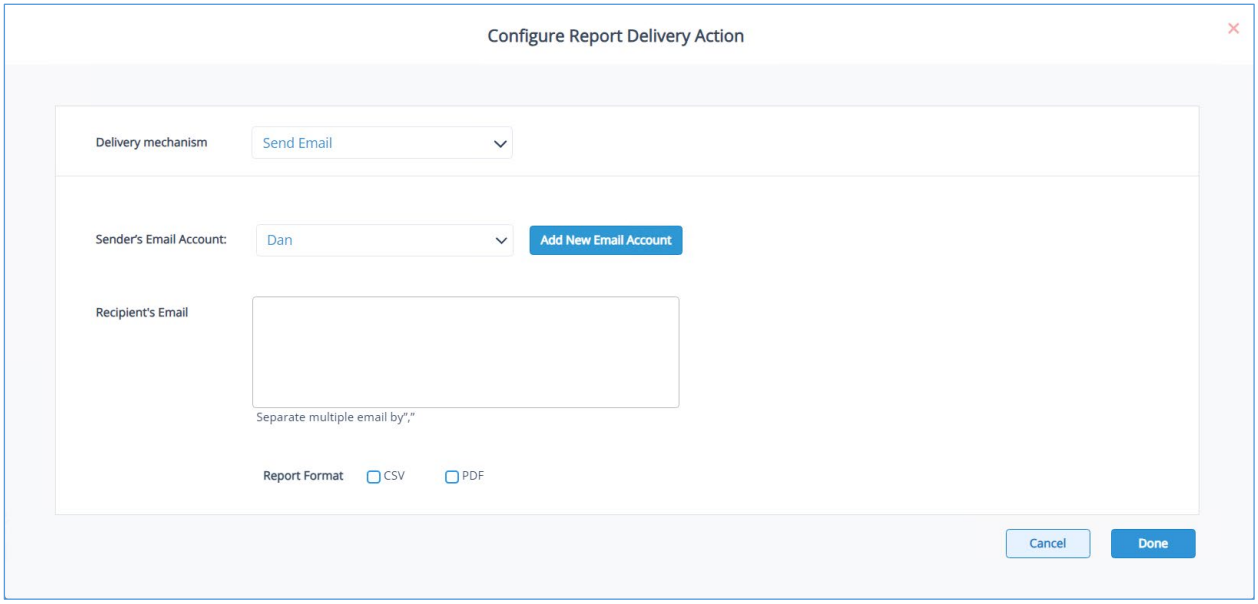

Figure 41: Configure Report Delivery Action

Add the following details:

Delivery mechanism: Select either **Send Email** or **Save Report on Disk**.

If **Save Report on Disk** is selected, the path where the reports will be saved is displayed and the Report Format of CSV or PDF can be selected. If **Send Email** is selected, then the email options are displayed as follows:

Sender's Email Account: Select the email address from the drop-down list or click **Add New Email Account** to add a new email address

Recipient's Email: Type the recipient's email address into the text box. Separate multiple emails with a ','.

Select the Report Format of either CSV or PDF

- Click **Done** when finished

- Click **Next**

The Subscription Schedule window is displayed:

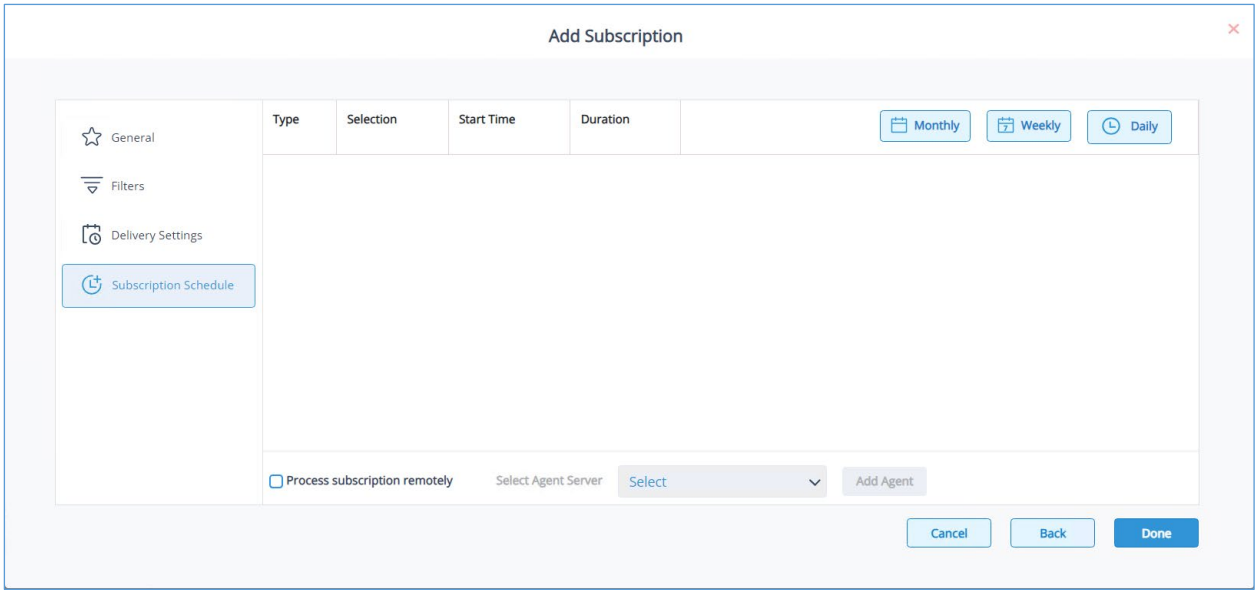

Figure 42: Subscription Schedule

- Click one of the schedule buttons to add either a **Monthly, Weekly** or **Daily Schedule**

- Select Process subscription remotely if required

- Select an **Agent Server** from the drop-down list or choose **Add Agent** to add a new Agent

- Click **Done** when finished and the Subscription will be saved

10 Support

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

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/.

11 Trademarks

Lepide Data Security Platform, Lepide Data Security Platform App, Lepide Data Security Platform App Server, Lepide Data Security Platform (Web Console), Lepide Data Security Platform Logon/Logoff Audit Module, Lepide Data Security Platform for Active Directory, Lepide Data Security Platform for Group Policy Object, Lepide Data Security Platform for Exchange Server, Lepide Data Security Platform for SQL Server, Lepide Data Security Platform SharePoint, Lepide Object Restore Wizard, Lepide Active Directory Cleaner, Lepide User Password Expiration Reminder, and LiveFeed are registered trademarks of Lepide Software Pvt Ltd.

All other brand names, product names, logos, registered marks, service marks and trademarks (except above of Lepide Software Pvt. Ltd.) appearing in this document are the sole property of their respective owners. These are purely used for informational purposes only.

Microsoft®, Active Directory®, Group Policy Object®, Exchange Server®, Exchange Online®, SharePoint®, and SQL Server® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

NetApp® is a trademark of NetApp, Inc., registered in the U.S. and/or other countries.