Lepide

Web console.

User guide.

Contents

1 Introduction

The Lepide Web Console provides an accessible and user-friendly interface for the Lepide Data Security Platform, offering a modern, logical, and intuitive layout making it easier to interrogate data with custom filters, and columns.

2 The Home Screen

The Home Screen for the Lepide Web Console will be displayed showing the four different Lepide categories , My Lepide and Global Dashboard. Clicking any of these buttons will take you into the relevant option.

The Home Screen Options are:

Lepide Auditor:	Track user interactions to sensitive data and key infrastructure
Lepide Trust:	Identify permission changes and users with privileged access
Lepide Detect:	Detect and respond to threats with anomaly detection and alerts
Lepide Identify:	Discover and classify sensitive data based on risk and value
My Lepide:	Jump right into your favorite reports and dashboards
Global Dashboard:	See a summary of the predefined Copilot reports

3 Role Management

3.1 Adding a New User or Group

From the Home Screen, click the Settings icon at the top right of the screen.

The Admin Console is displayed:

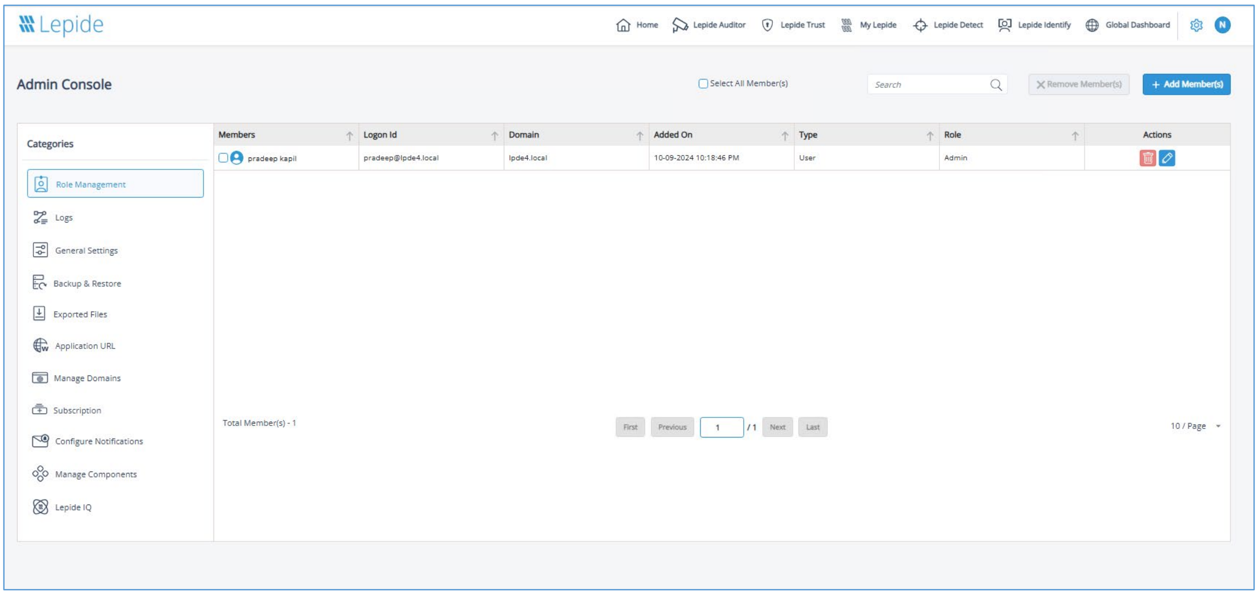


Figure 1: Admin Console/Role Management

- Click the **Add Members** button

The following dialog box is displayed:

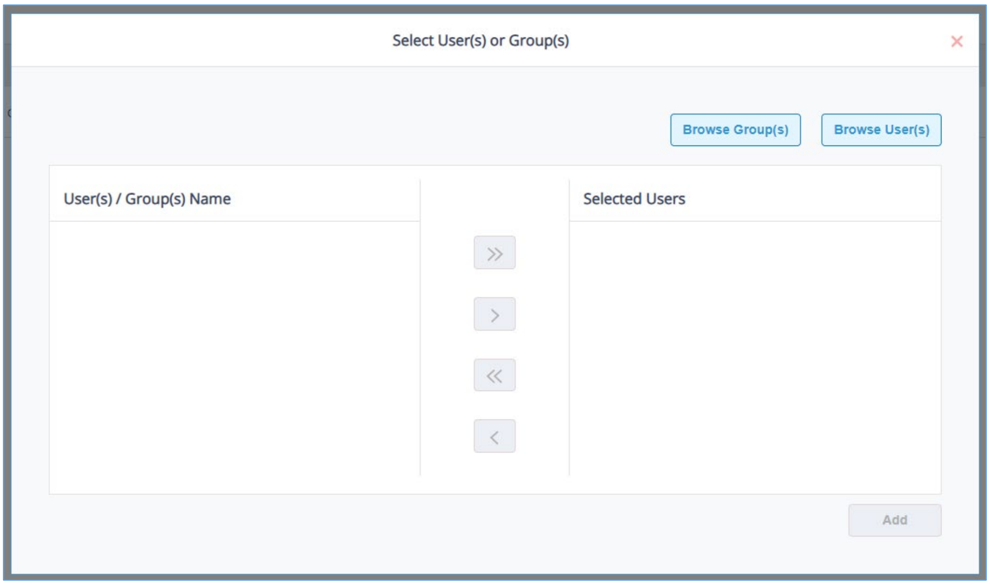


Figure 2: Select Users or Groups

3.2 Adding a Group

- Click the **Browse Group(s)** button

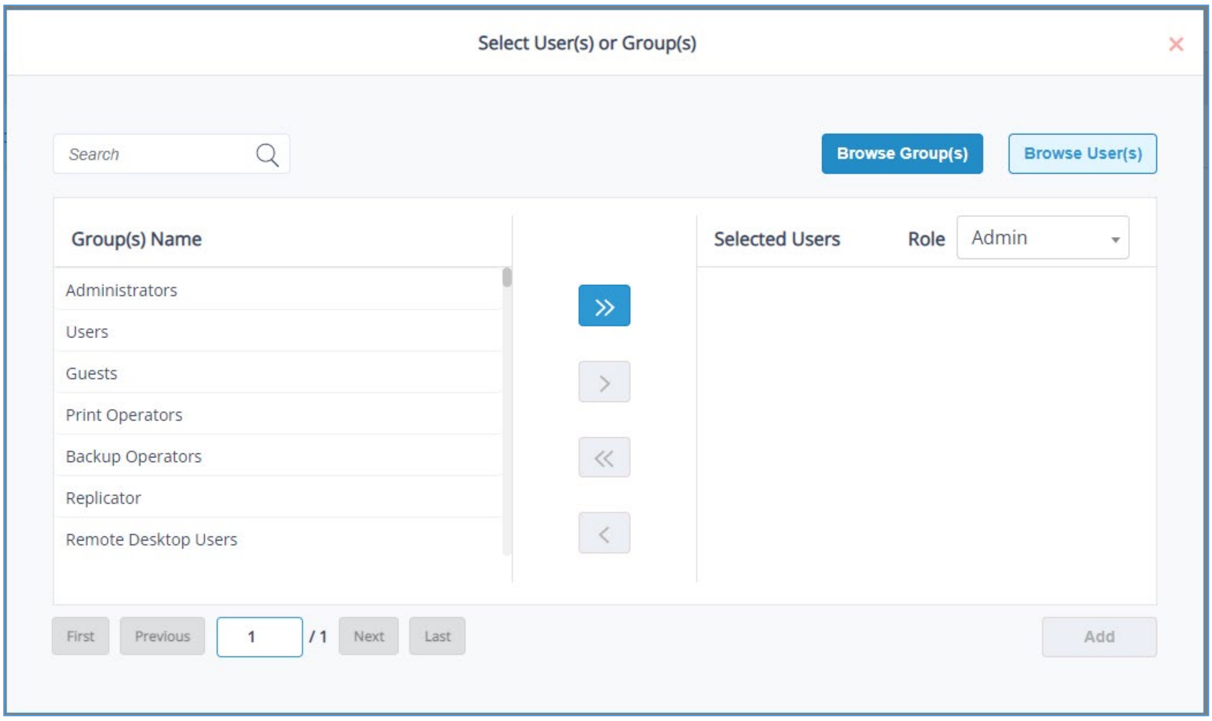
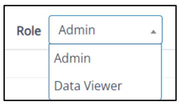


Figure 3: Groups

- The Group(s) Name area will be populated with all the Groups available
- If there are multiple pages of group names, use the **First/Previous/Next/Last** navigation buttons to move through the pages
- To search for a particular group, click on the **Search** bar at the top of the dialog box and type the search text
- To add all listed groups, click the  button
- To add a specific group, click to select the group and click the  button to add it to the selected users list.
- Repeat this last step for any other groups you want to add
- Select the required role of either **Admin** or **Data Viewer**: 

- Click the **Add** button to add the group(s)

3.3 Adding a User

- Click the **Browse User(s)** button
- The User(s) Name area will be populated with all the usernames available

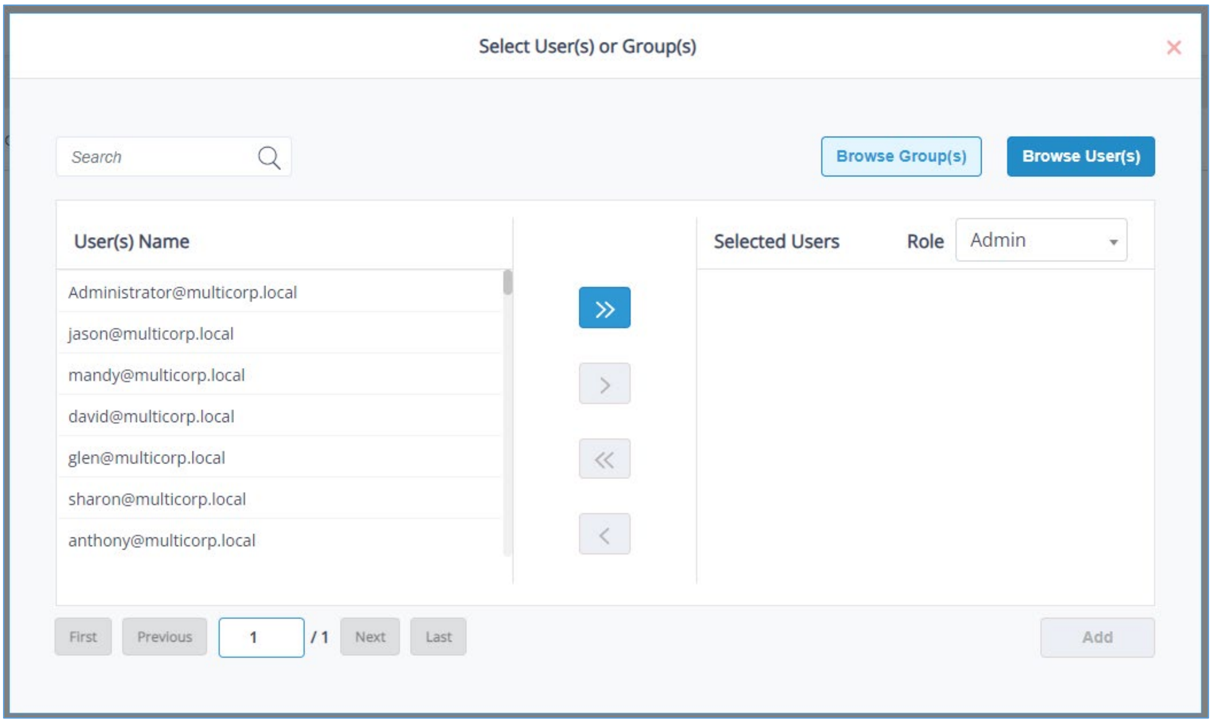
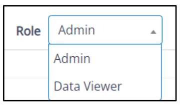


Figure 4: Users

- If there are multiple pages of usernames, use the **First/Previous/Next/Last** navigation buttons to move through the pages
- To add all users, click the  button
- To add a specific user, click to select the username and click the  button to add it to the selected users list.
- Repeat this last step for any other users you want to add
- Select the required role either Admin or Data Viewer: 

- Click the **Add** button

4 Dashboards and Reports

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

4.1 Dashboard Options

The Lepide Auditor Dashboard screen is displayed. This contains pre-defined dashboards based on reports for the chosen category (in this case Lepide Auditor).

The following options to change the time period and to refresh the data are available:

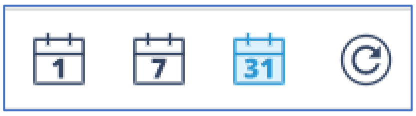


Figure 5: Dashboard Options

- These options are 1 day ago, 7 days ago, 31 days ago and Refresh

4.2 Display the Report Behind the Data

Clicking on an area of data within the dashboard will display the report on which the data was based

- In the example below, clicking on the first column in the chart will display the All Environment Changes Report which is the report that this Dashboard chart was based on:

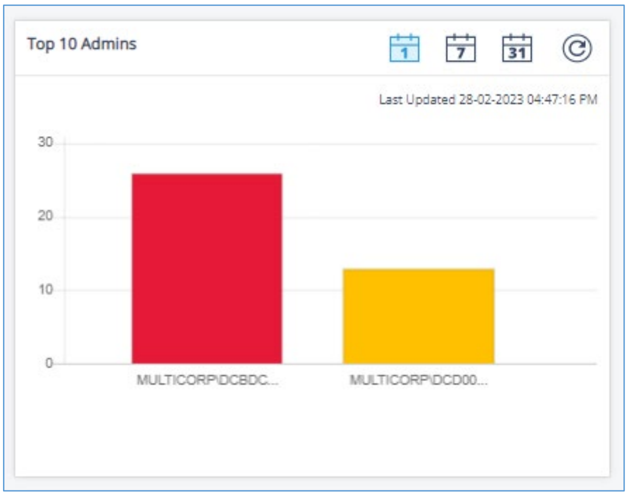


Figure 6: Dashboard Data

- Click **Generate** to generate the report:

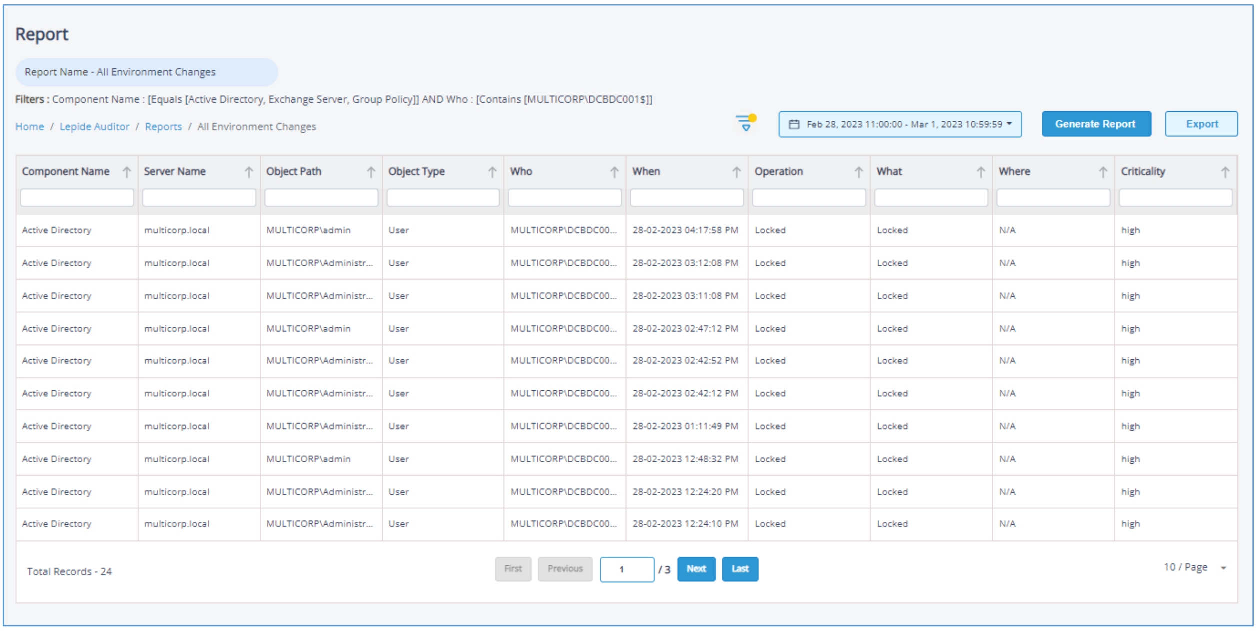


Figure 7: Report Behind the Dashboard Data

4.3 Running a Report

- From the top of the Dashboard screen, click on **Lepide Auditor** and choose **Reports**

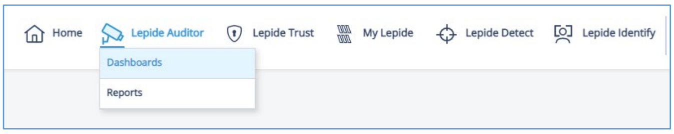


Figure 8: Menu Options

The Reports Window is displayed:

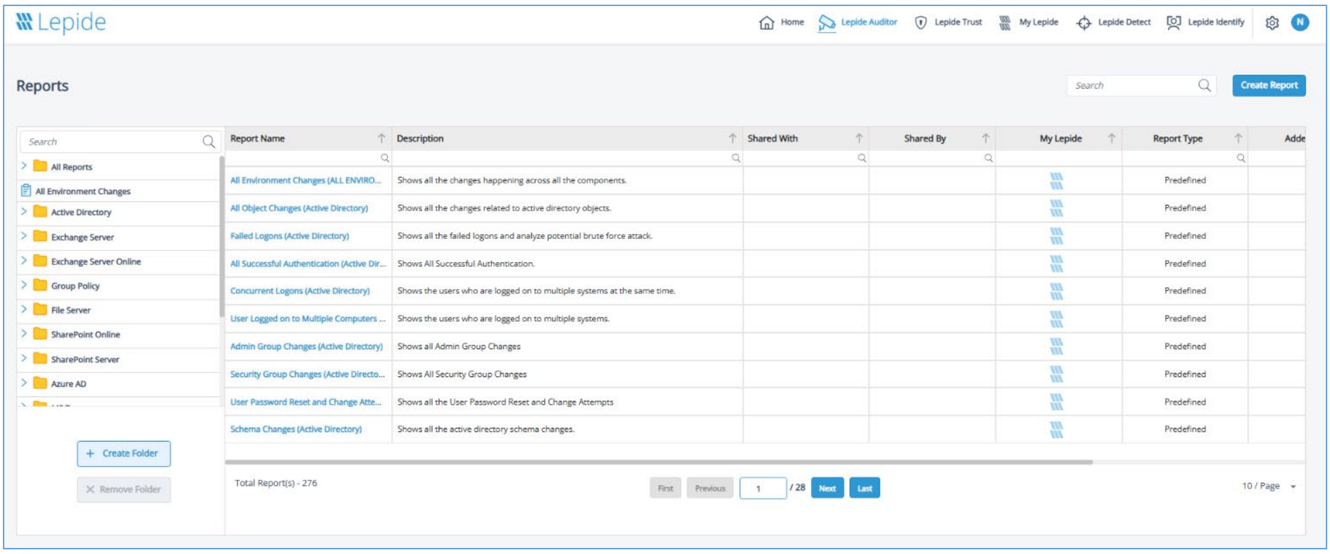


Figure 9: Reports Window

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

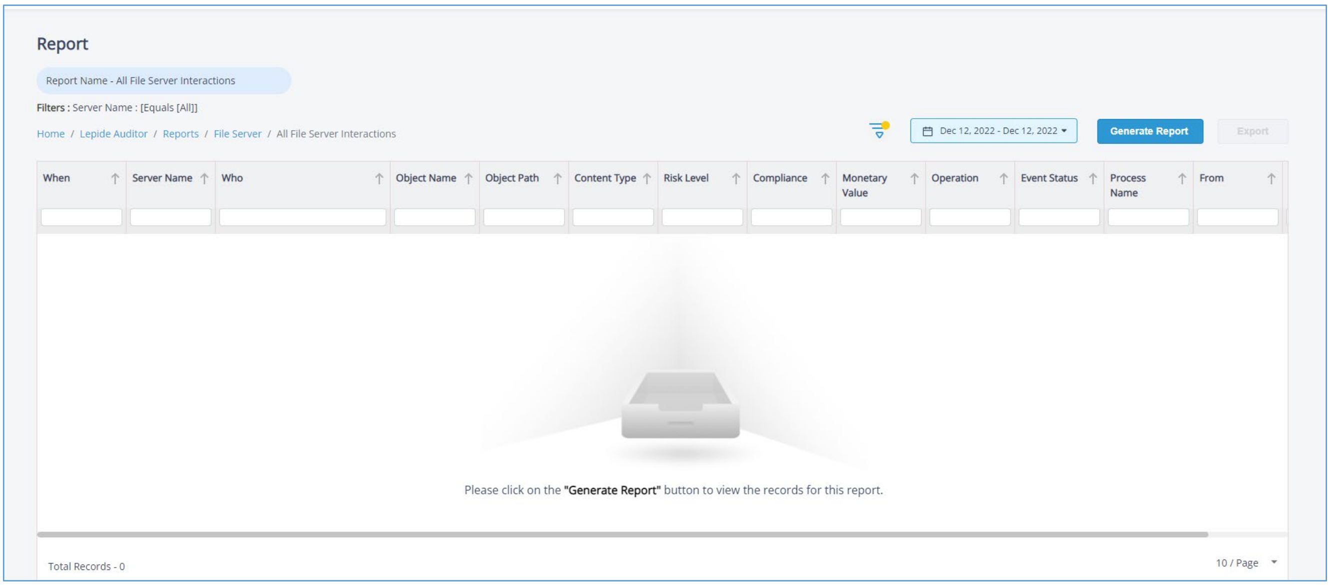


Figure 10: All File Server Interactions Report

4.3.1 Specify a Date Range

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

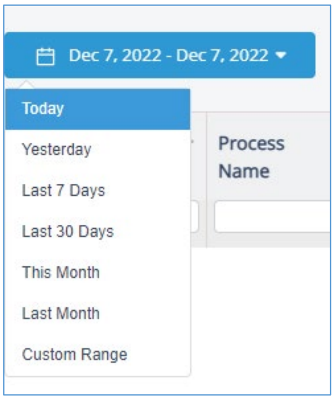
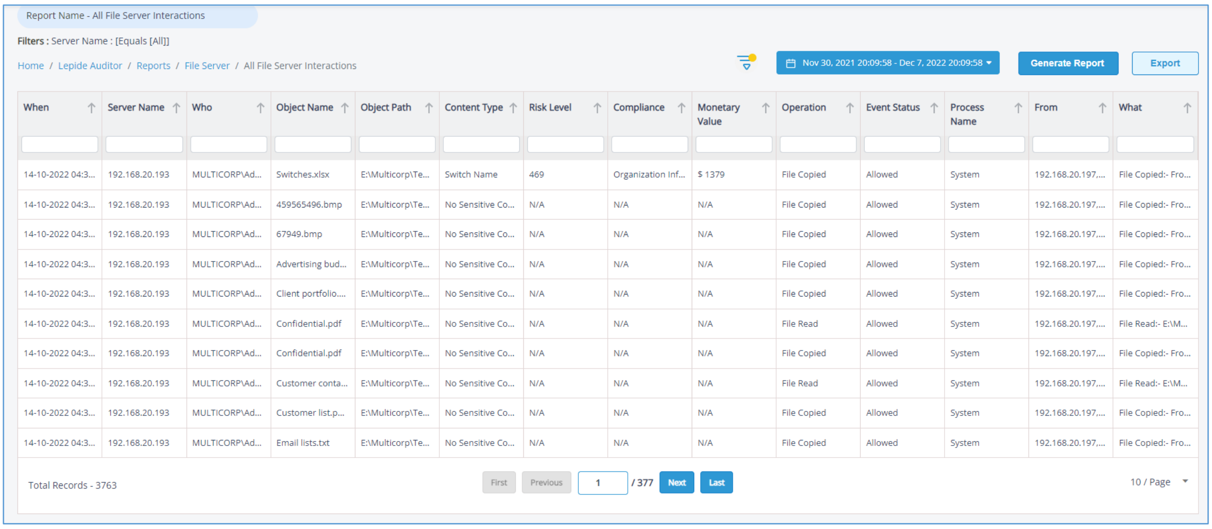


Figure 11: Date Range Filter

- Select a date range from the list
- Click the **Generate Report** button to run the report for the specified time period



When	Server Name	Who	Object Name	Object Path	Content Type	Risk Level	Compliance	Monetary Value	Operation	Event Status	Process Name	From	What
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Switches.xlsx	E:\Multicorp\Te...	Switch Name	469	Organization Inf...	$ 1379	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	459565496.bmp	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	67949.bmp	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Advertising bud...	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Client portfolio....	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Confidential.pdf	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Read	Allowed	System	192.168.20.197,...	File Read:- E:\M...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Confidential.pdf	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Customer conta...	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Read	Allowed	System	192.168.20.197,...	File Read:- E:\M...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Customer list.p...	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...
14-10-2022 04:3...	192.168.20.193	MULTICORP\Ad...	Email lists.txt	E:\Multicorp\Te...	No Sensitive Co...	N/A	N/A	N/A	File Copied	Allowed	System	192.168.20.197,...	File Copied:- Fro...

Figure 12: Generated File Server Interactions Report

5 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:

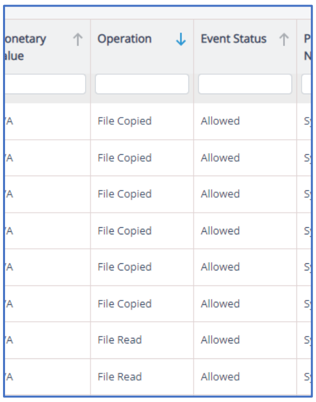


Figure 13: Sorting a Report

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

6 Applying a Filter to a Report

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

6.1 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:

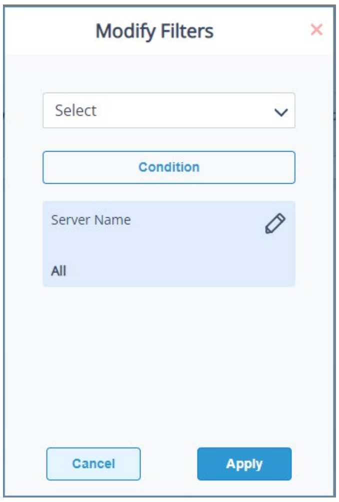


Figure 14: Modify Filters

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

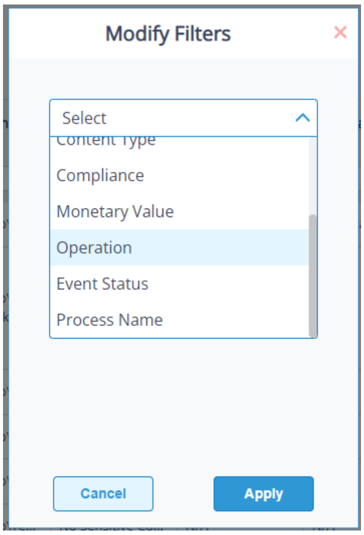


Figure 15: Choose a Column to Filter By

Operation

Operation now appears in the dialog box with blue highlight:

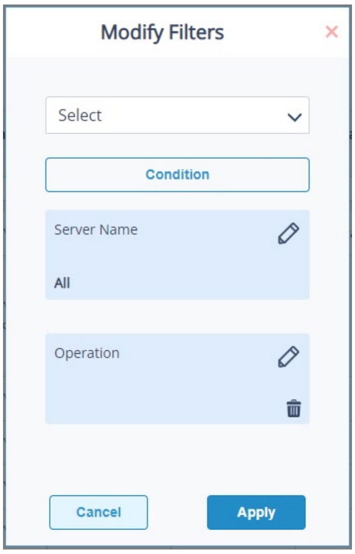


Figure 16: Filter Shows with Blue Highlight

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

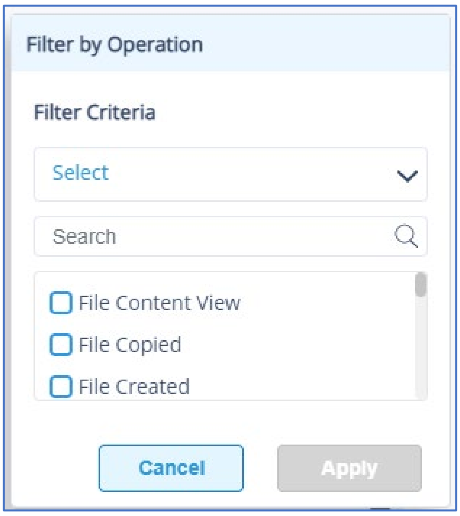


Figure 17: Filter Criteria

- 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 **Equals** or **Not Equals**:

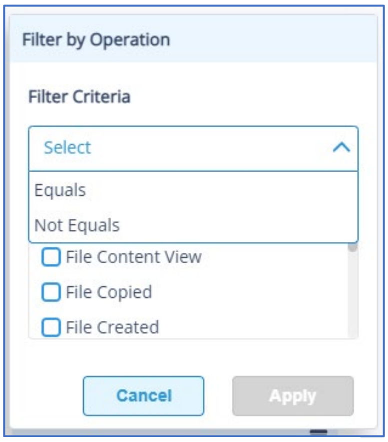


Figure 18: Filter Condition

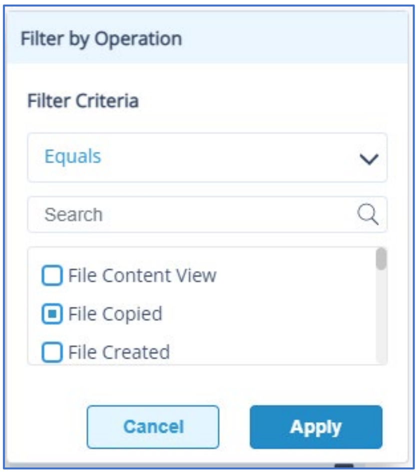


Figure 19: Select the Column(s) to Filter By

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

The report will run and will display the filtered data

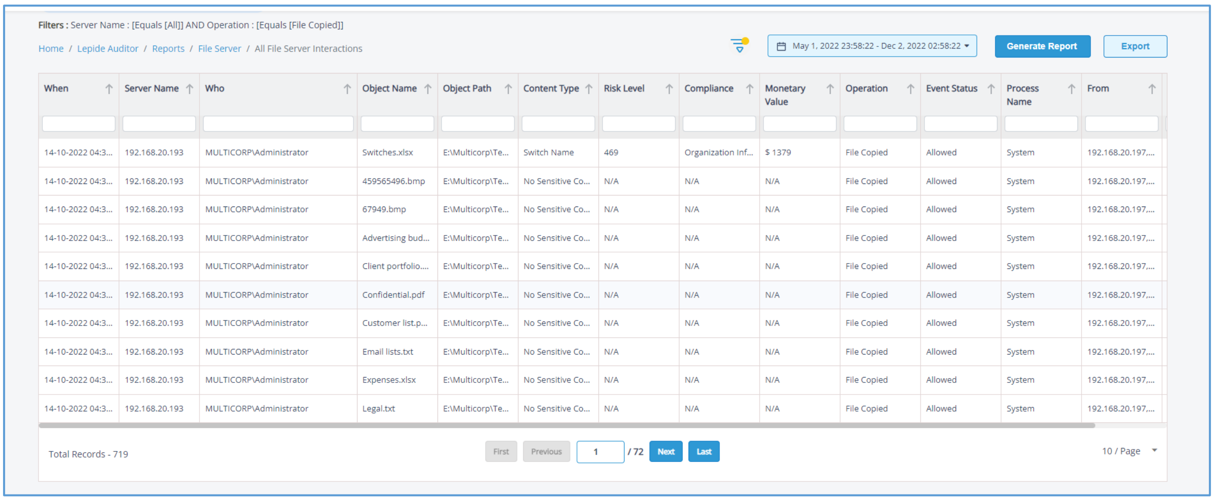


Figure 20: File Server Interactions Report with Filter

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:

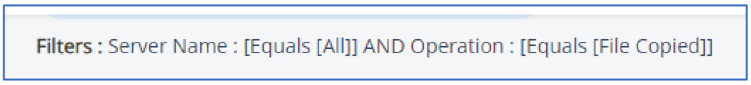


Figure 21: Details of the Filter Applied

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

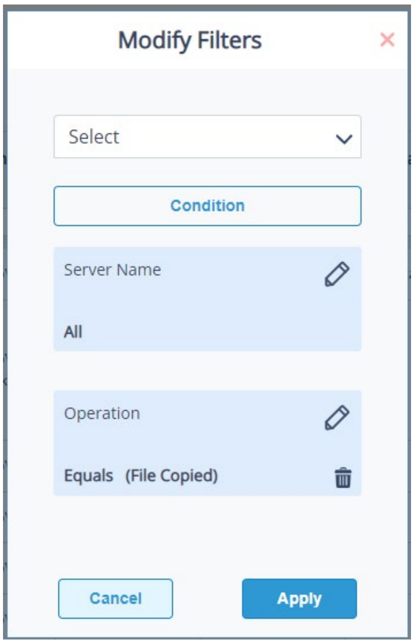


Figure 22: Edit a Filter

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

6.2 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.

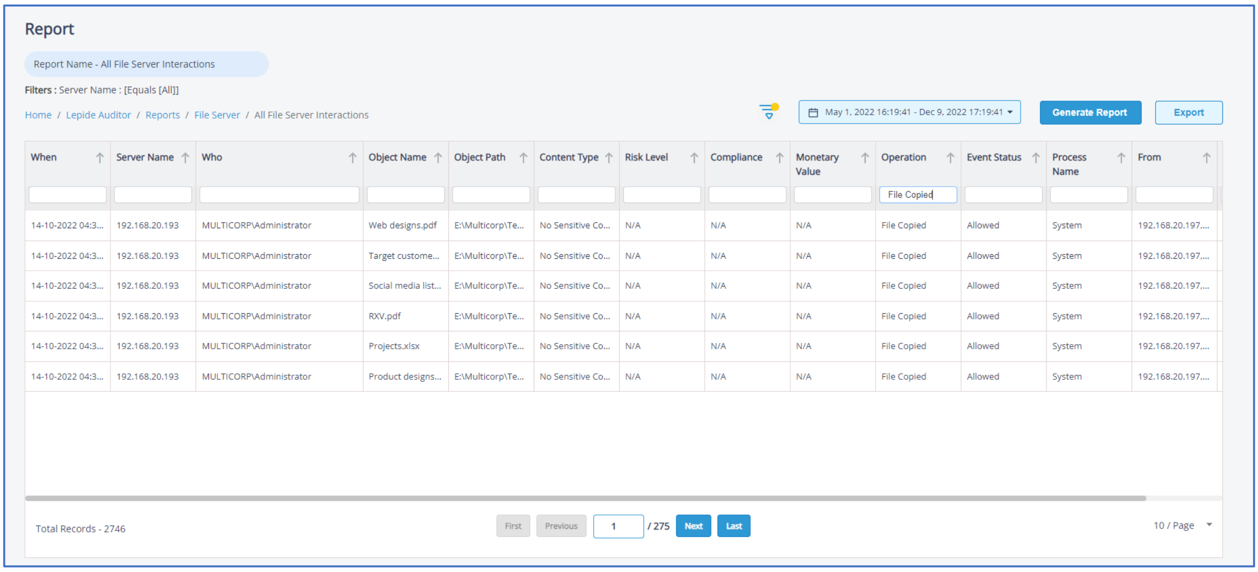


Figure 23: Filter Applied Using Colum Heading

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

7 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.

To export a report:

From the Reports screen, click the **Export** button

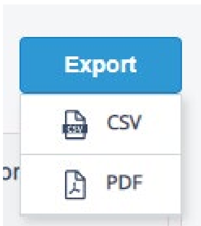


Figure 24: Export Options

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

A message is displayed:

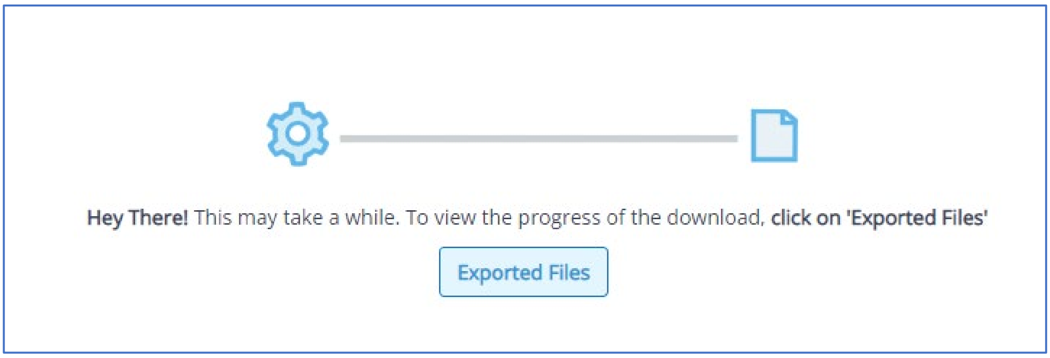


Figure 25: Export to PDF Message

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

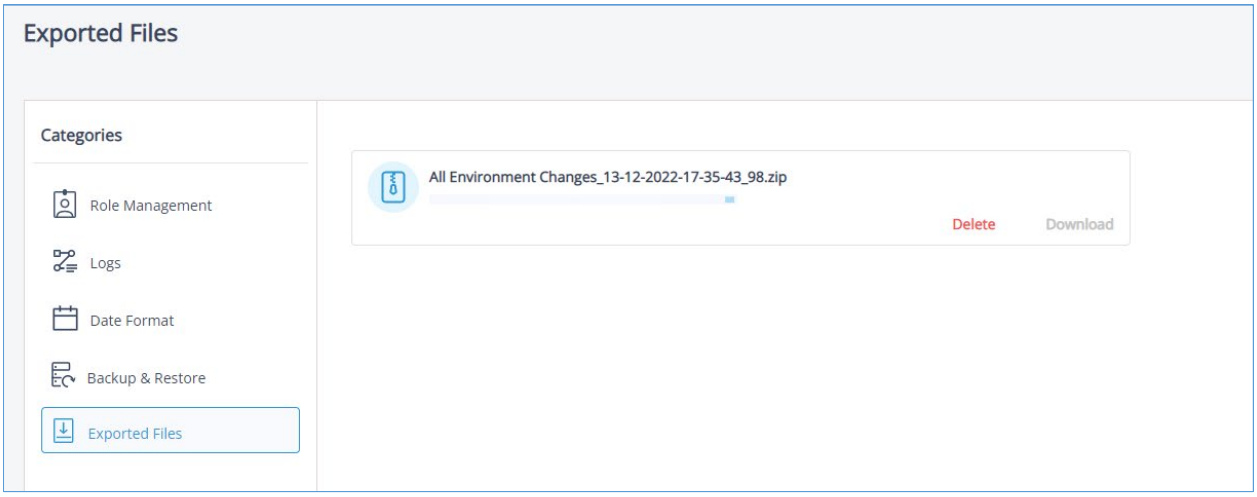


Figure 26: Exported Files

8 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.

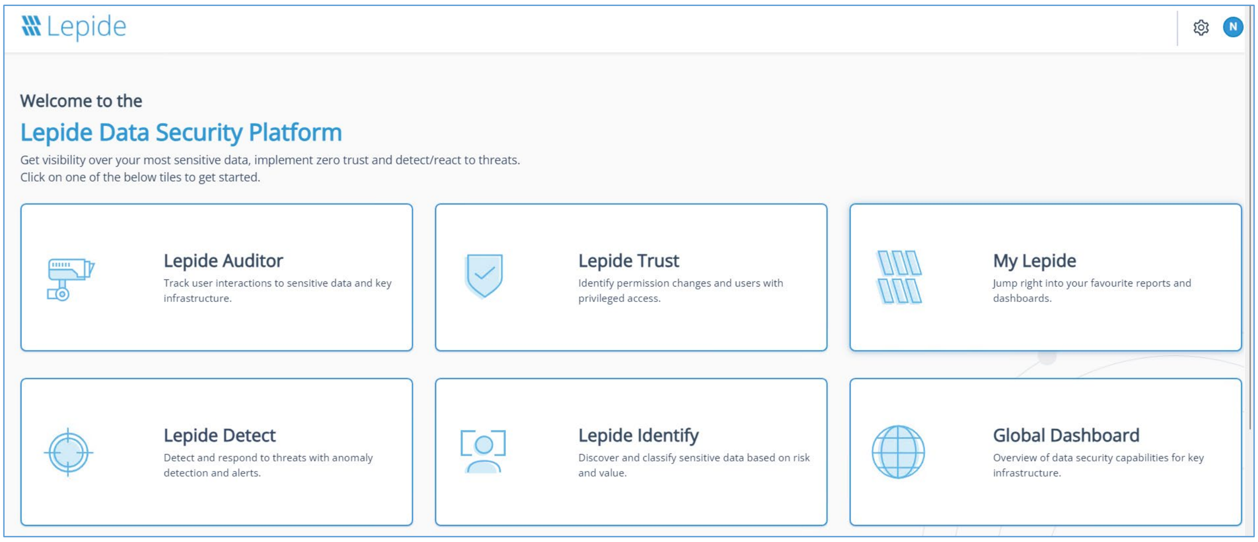


Figure 27: Home Screen

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:

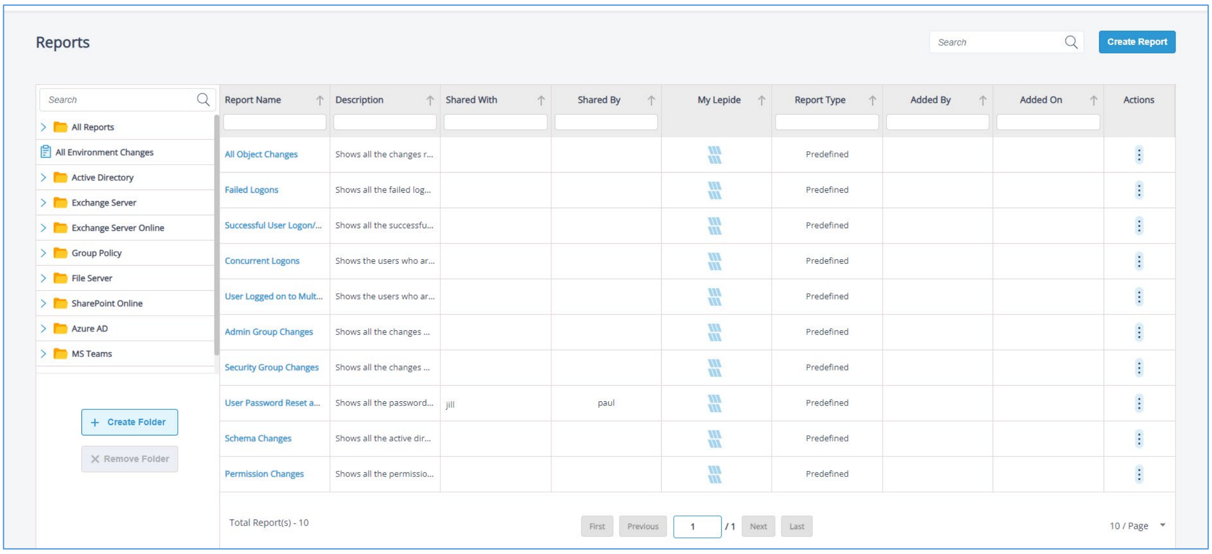


Figure 28: Reports Screen

- Find the report you want to save to **My Lepide**
- Click the icon in the My Lepide column to add the report to the My Lepide Dashboard

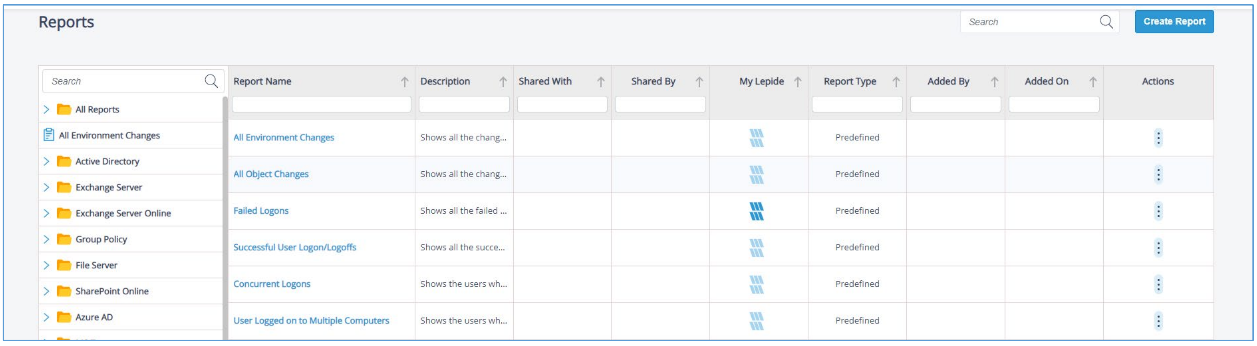


Figure 29: Report Added to My Lepide

In the above example, the **Failed Logons Report** has been added to **My Lepide**. This can be seen as the icon has changed to 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 at the top of the **Reports** Screen or from the option on the **Home** screen

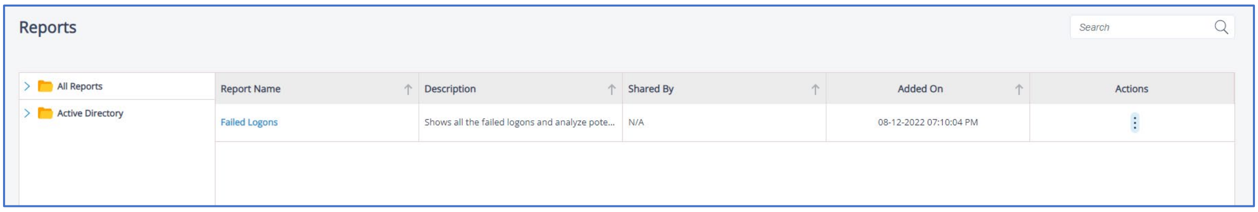


Figure 30: My Lepide Dashboard

9 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 create a custom report:

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

The Dashboards screen is displayed

- From the top of the screen, click on a Lepide Category, for example, Lepide Auditor and choose Reports

The Reports Window will be displayed:

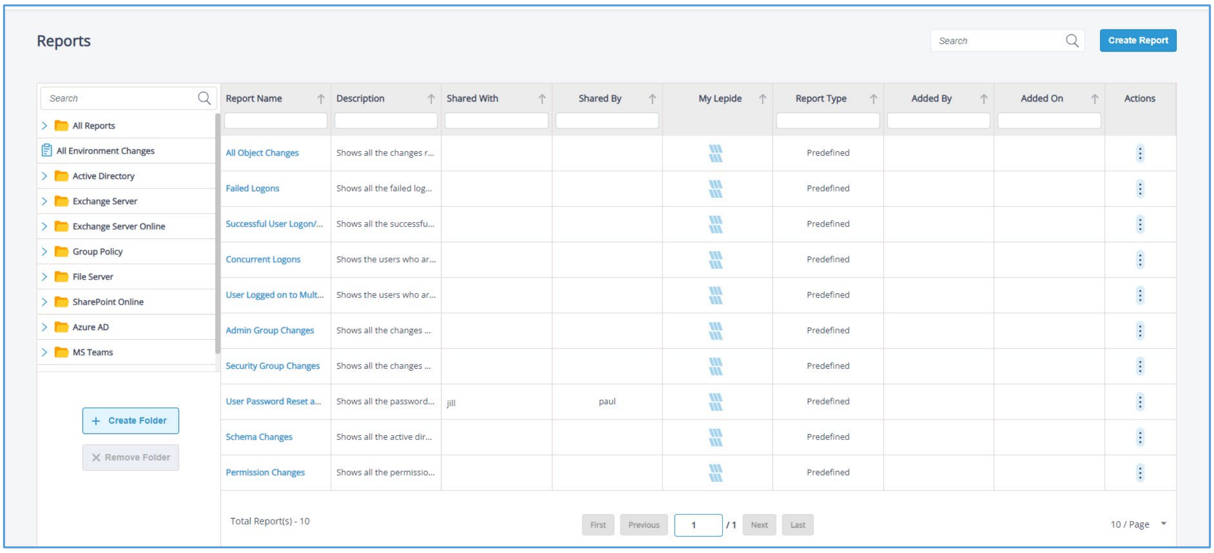


Figure 31: Reports Screen

- To create a report, click the **Create Report** button

The Create Report dialog box is displayed:

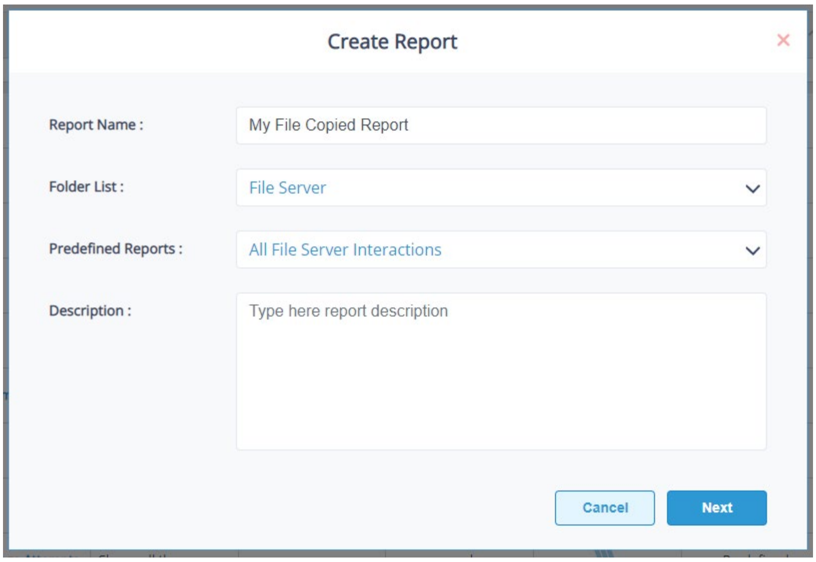


Figure 32: Create Report

- Enter a Report Name
- Select from **Folder List** the Folder you want the report to be stored in
- Select from **Predefined Reports** the Predefined Report that this new report is to be based on
- Add an optional **Description**
- Click **Next**

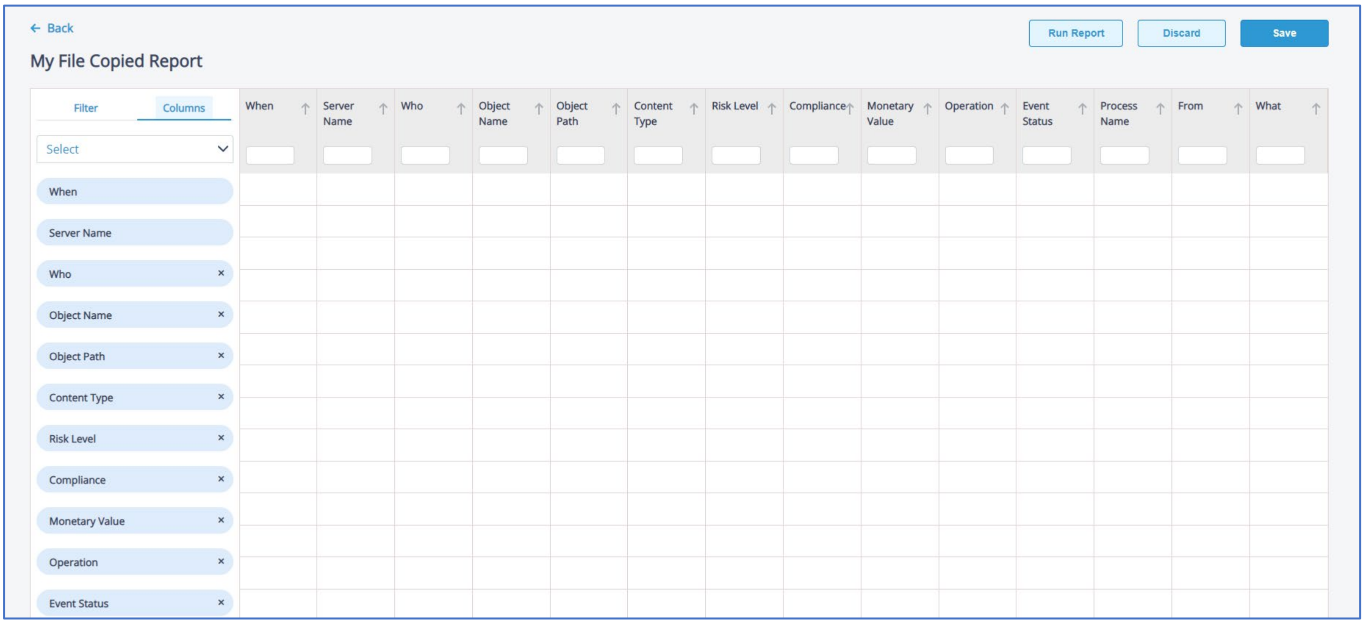


Figure 33: Report Editor Screen

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

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 setting 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 chose previously

9.1 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 34: Edit a Customized Report

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

10 Subscription

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

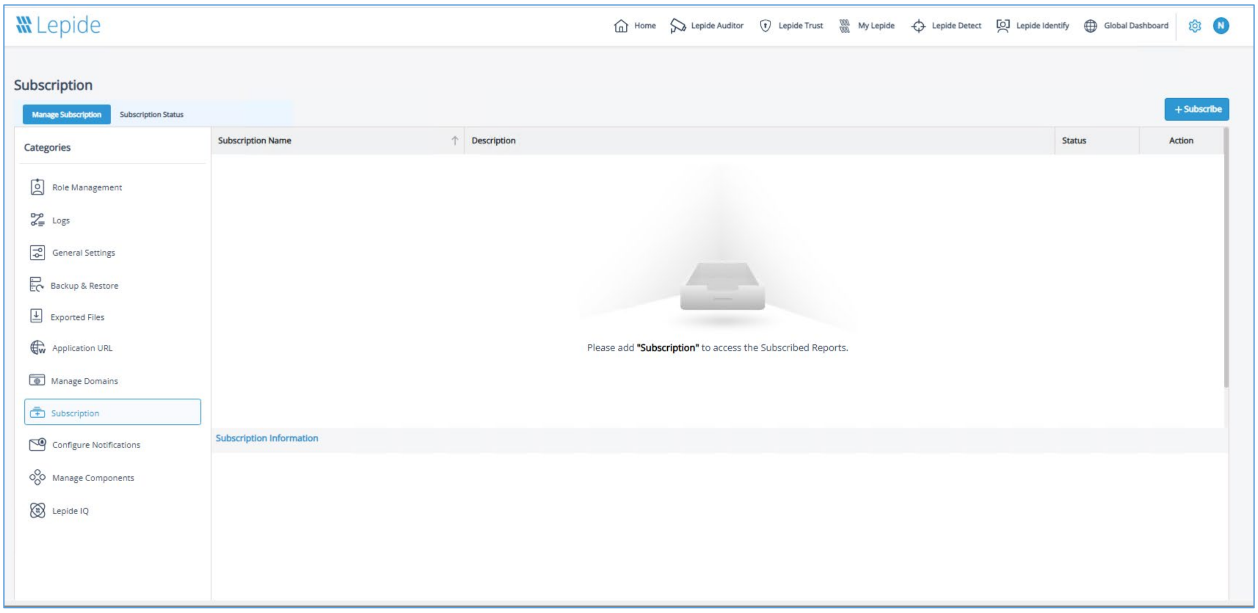


Figure 35: Subscription

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

  The **Add Subscription** wizard will start:

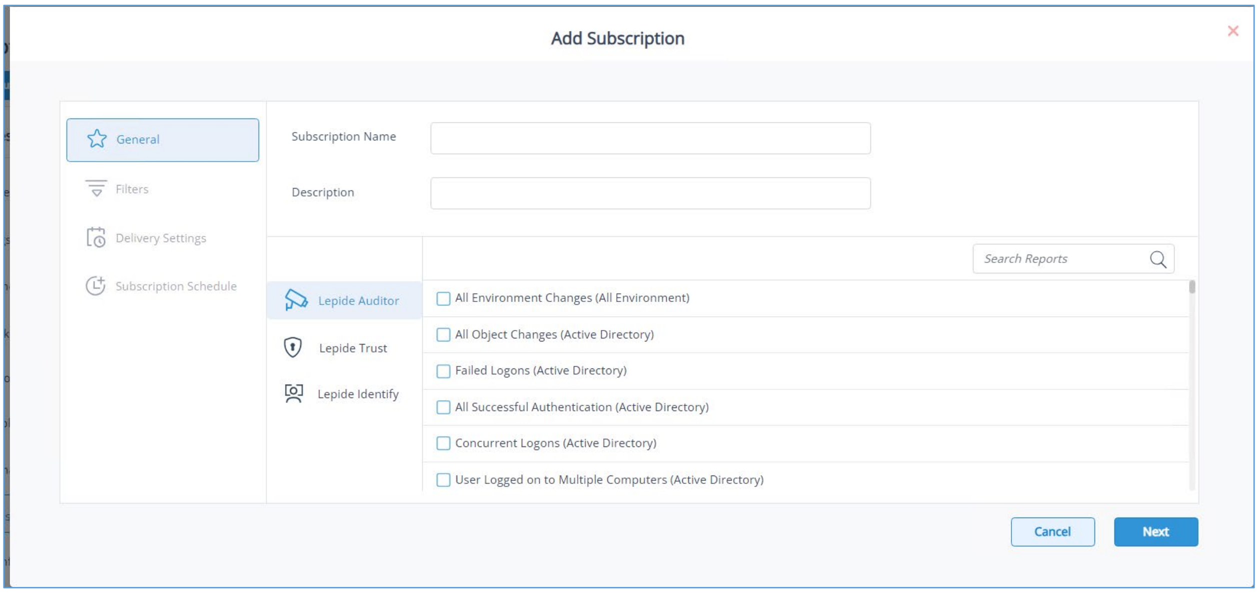


Figure 36: Add Subscription - General

- 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:

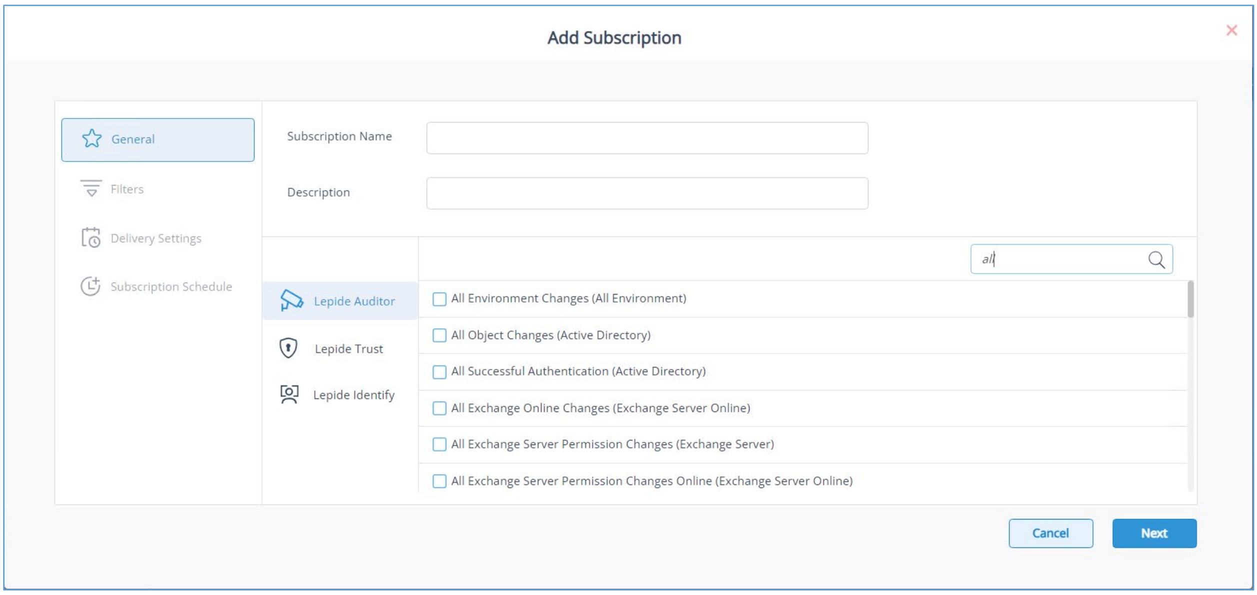


Figure 37: Search Reports

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

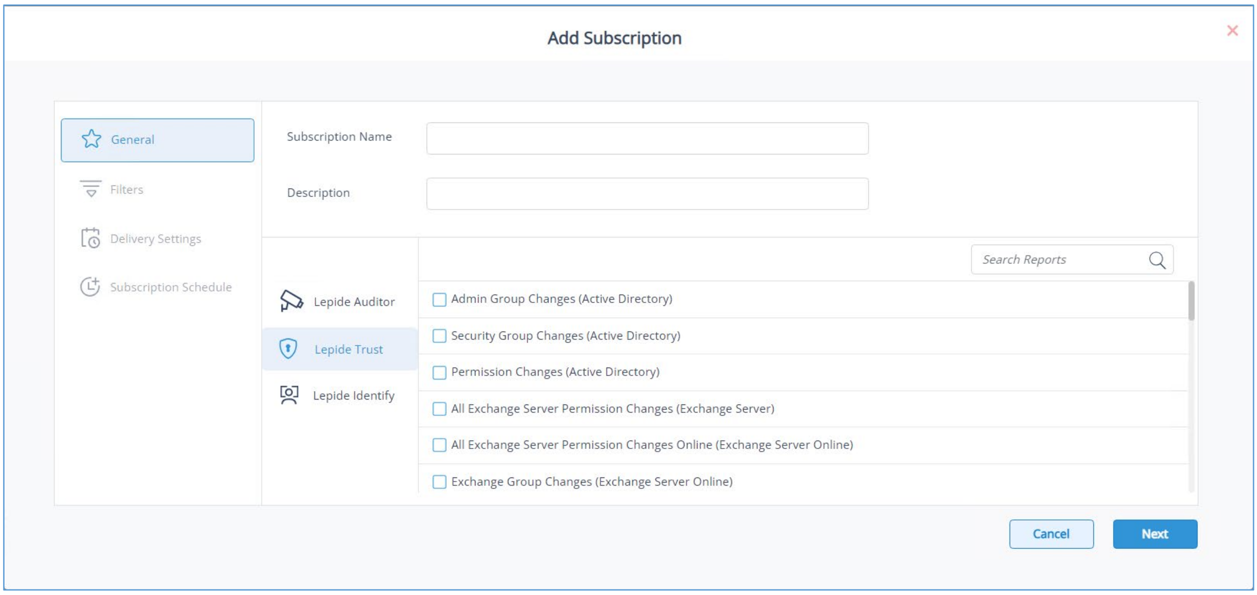


Figure 38: Select Lepide Category

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

The Filters window is displayed:

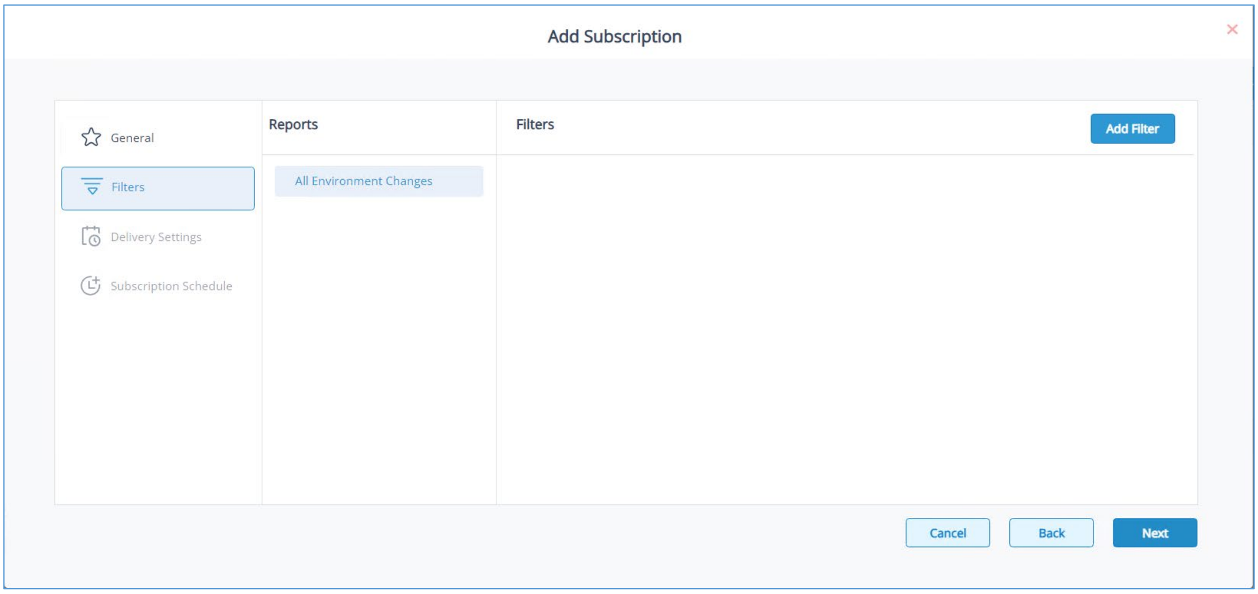


Figure 39: Add Subscription - Filter

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

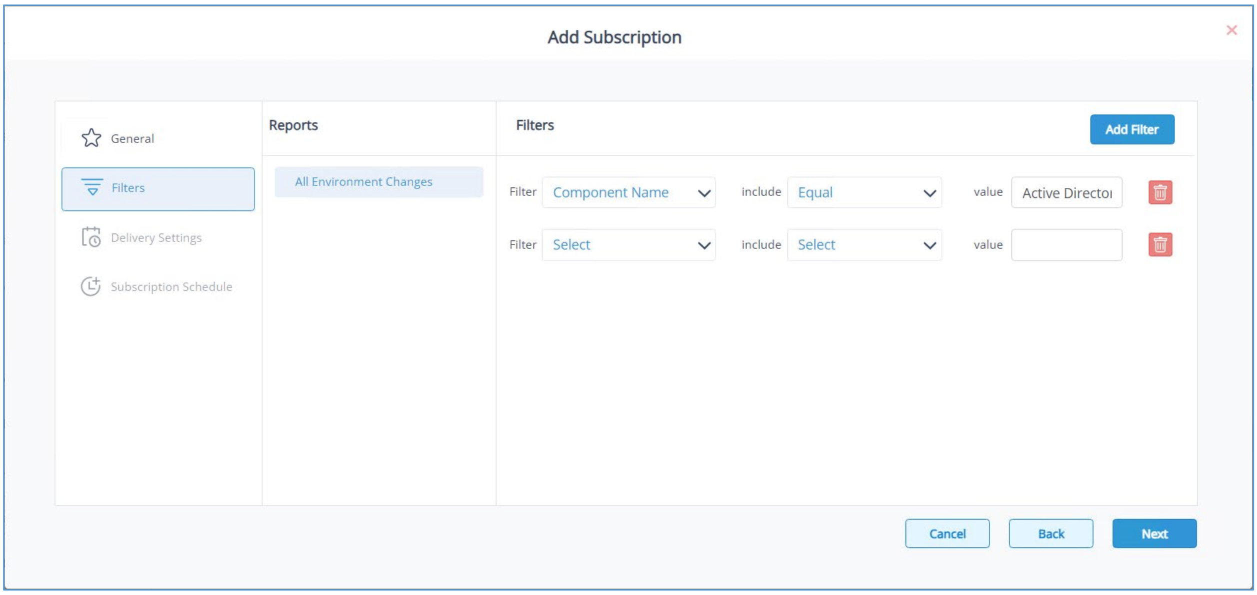


Figure 40: Add Filter

- Click **Next**

The Delivery Settings window is displayed:

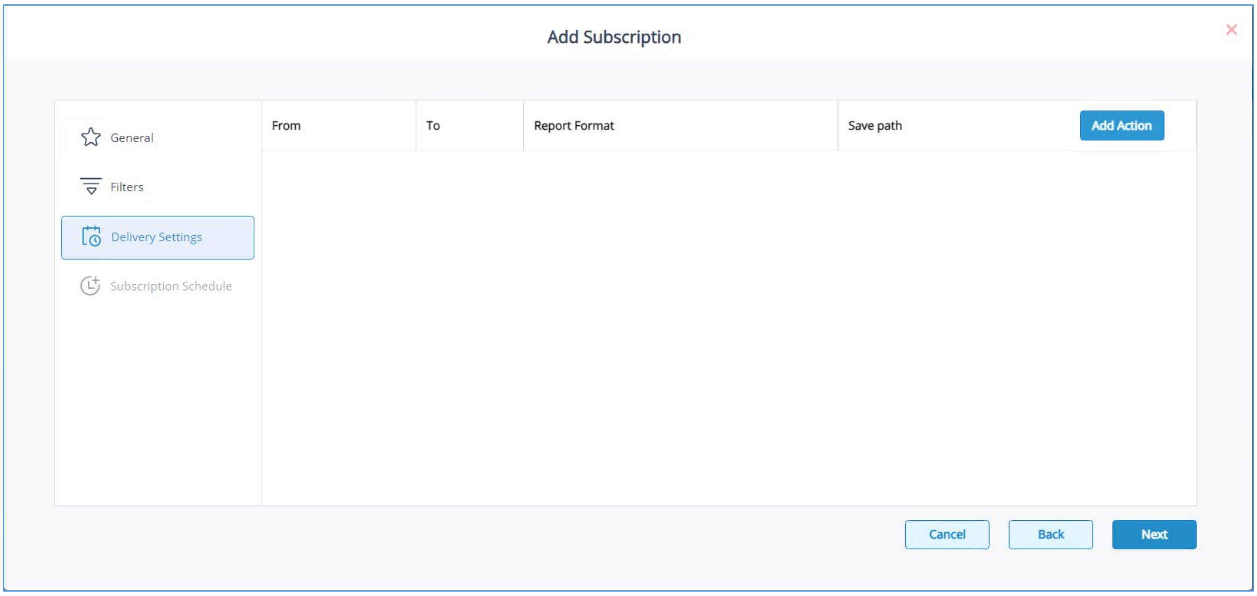


Figure 41: Delivery Settings

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

- Click Add Action

The Configure Report Delivery Action window is displayed:

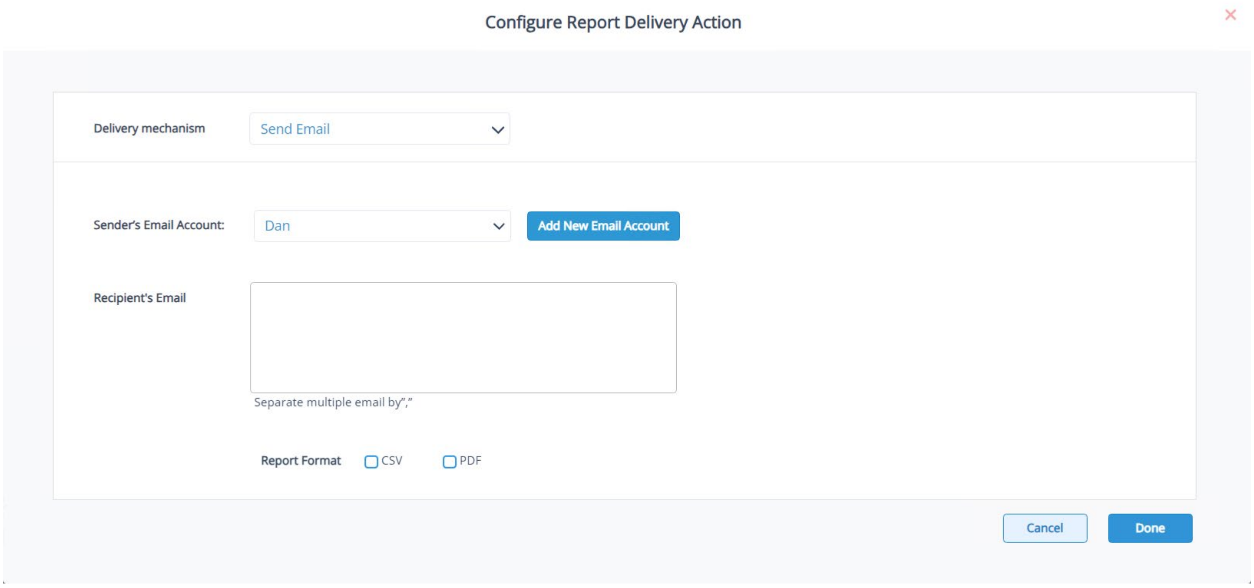


Figure 42: Configure Report Delivery Action

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:

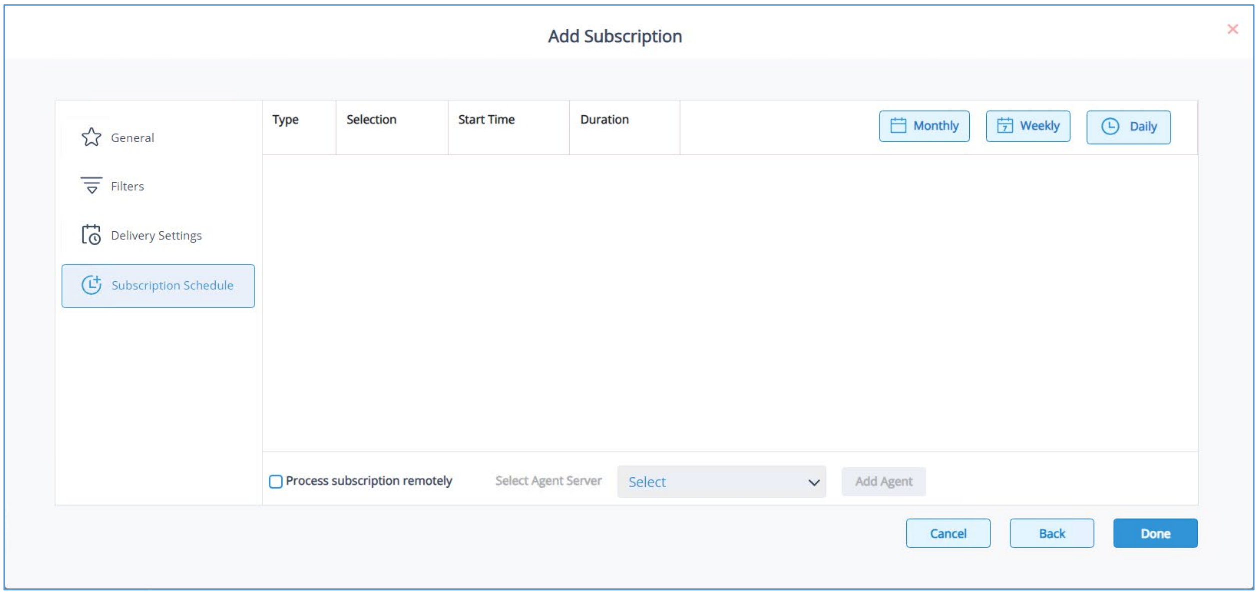


Figure 43: Subscription Schedule

- 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

11 Creating a Customized Dashboard

Dashboards can be customized so that you can choose exactly which graphs you want to see, giving you an immediate visual representation of your data.

You can create customized dashboards for Lepide Auditor, Lepide Trust and Lepide Identify. In this example, we will create a dashboard for Lepide Auditor:

- From the Home Screen, click on Lepide Auditor

The Lepide Auditor Dashboards will be displayed:

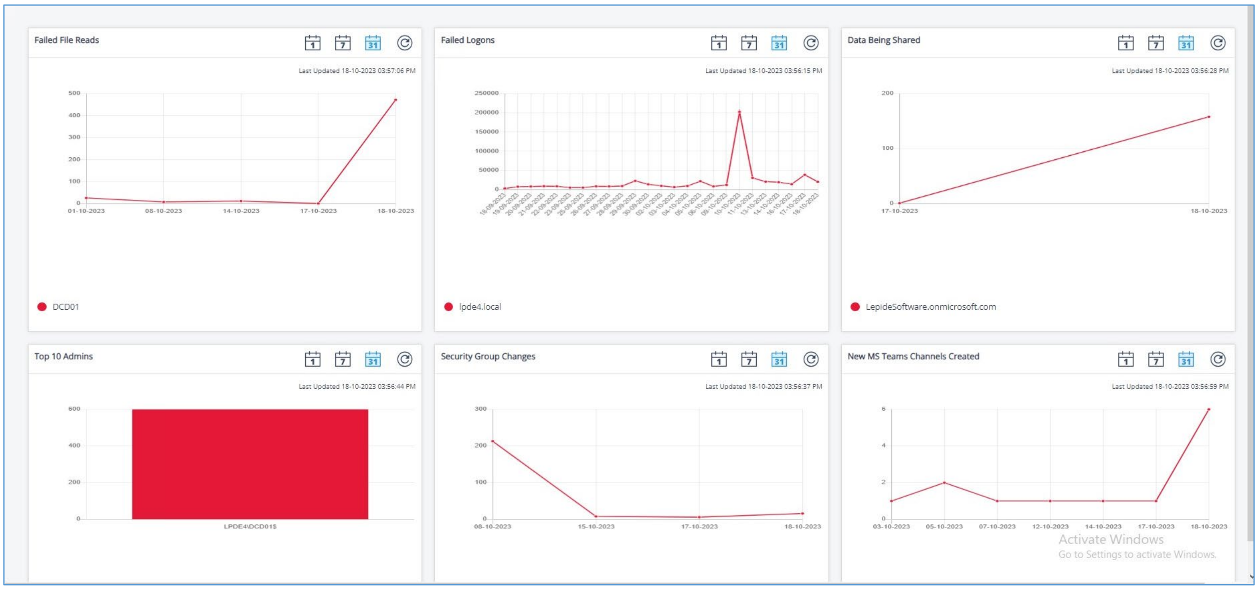


Figure 44: Lepide Auditor Dashboards

- Click on the **Manage Dashboard** button (top right of the screen)
- A list of all dashboards will be displayed:

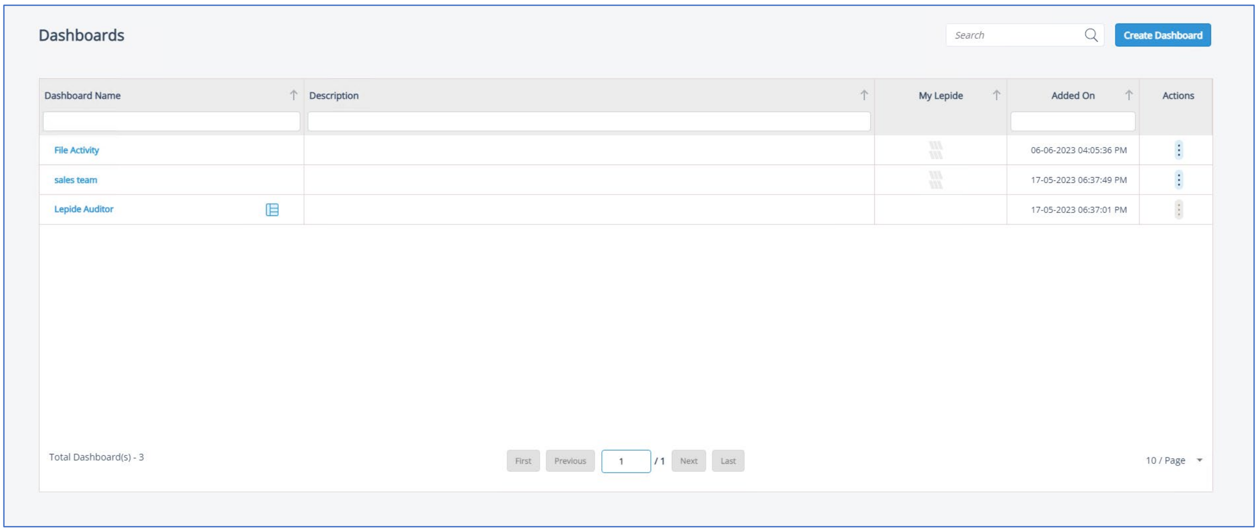


Figure 45: List of Dashboards

- Click on the **Create Dashboard** button

The Create Dashboard dialog box will be displayed:

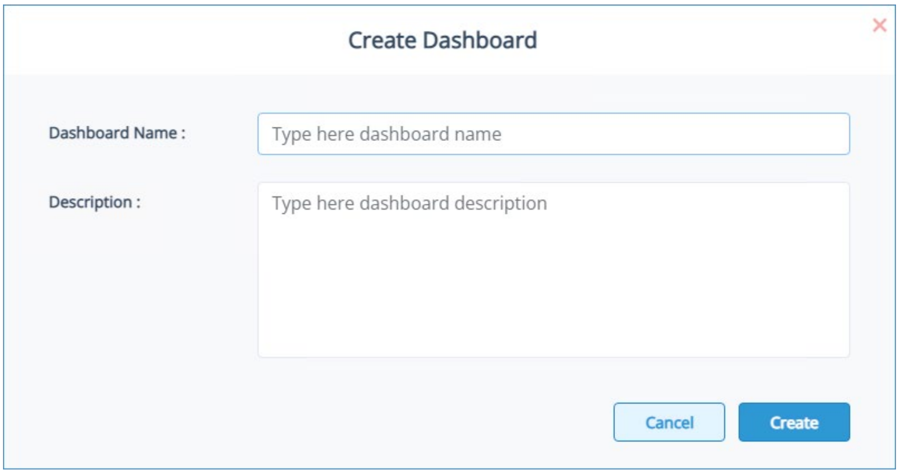


Figure 46: Create Dashboard

- Add a **Name** and **Description** for the dashboard
- Click **Create**

The Dashboard screen is displayed with the Dashboard name at the top:

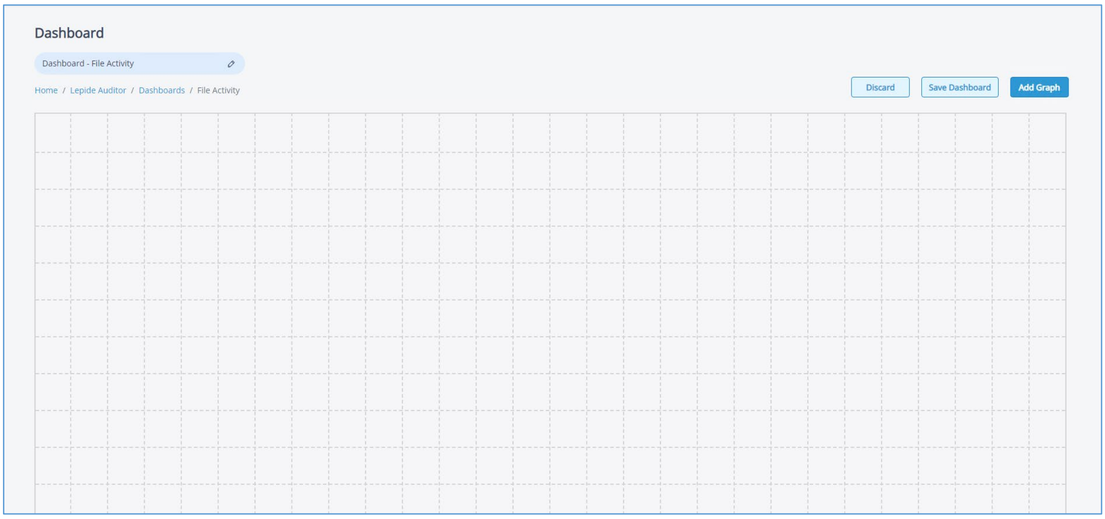


Figure 47: Dashboard Screen

- Click **Add Graph**

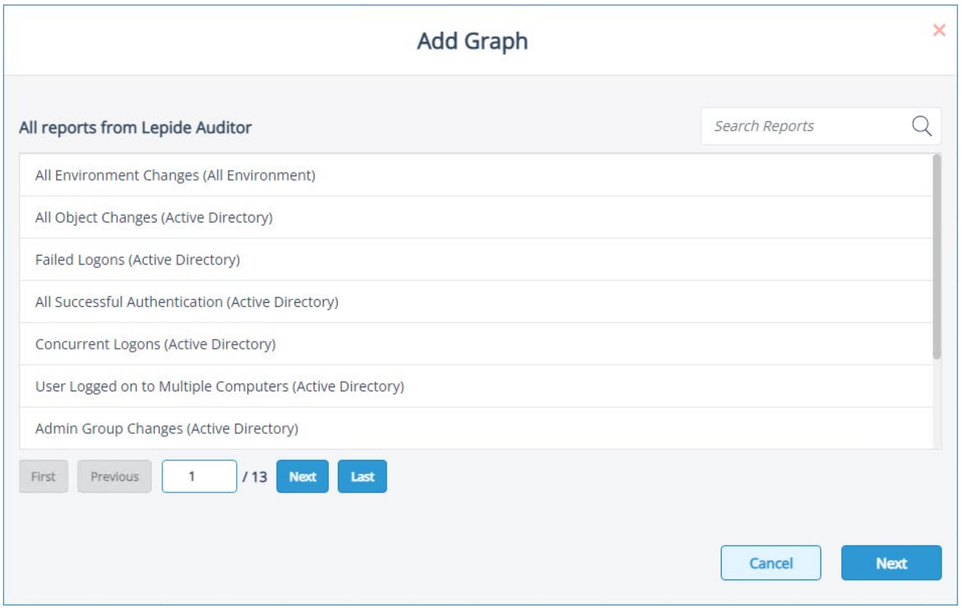


Figure 48: Add Graph

- A list of all reports from Lepide Auditor is displayed and this list includes both pre-defined and customized reports.
- Scroll down or click the First/Last/Previous/Next buttons to move through the list of reports. If you know the name or part of the name of the report, type the name into Search Reports and a filtered list of reports will be displayed:

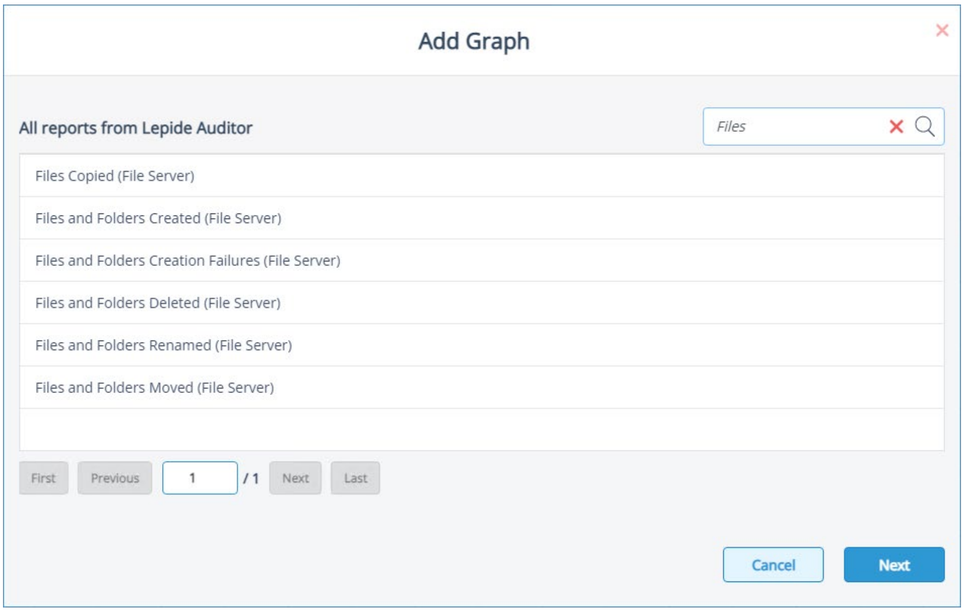


Figure 49: Filtered List of Reports

- In the example above, ‘Files’ has been entered into the search box so a list of reports starting with ‘Files’ is listed.
- Choose the report want to include in your dashboard and click **Next**

  The Choose Your Graph Style dialog box is displayed:

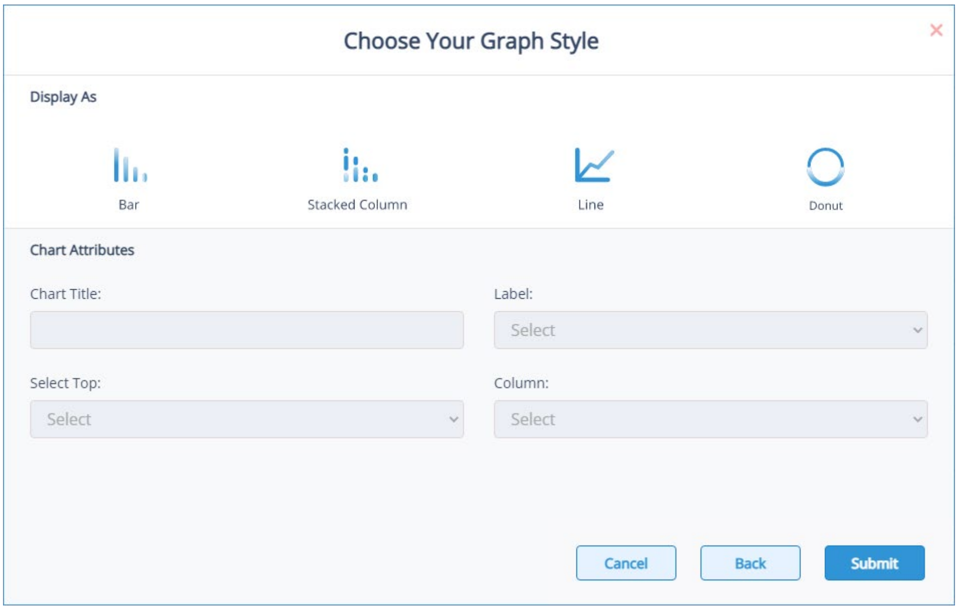


Figure 50: Choose Your Graph Style

From this dialog box select from the following options:

- Choose the type of graph you require from Bar, Stacked Column, Line and Donut
- **Chart Title**: add a title which will appear at the top of the chart
- **Label**: select a label which will be a field name from the selected report
- **Select Top**: This is the number of records to be displayed
- **Column**: This is not applicable for this example as it applies to Lepide Identify only
- Click **Submit**

The graph will be displayed as a box on the grid with no data displayed yet

- Click **Save Dashboard**

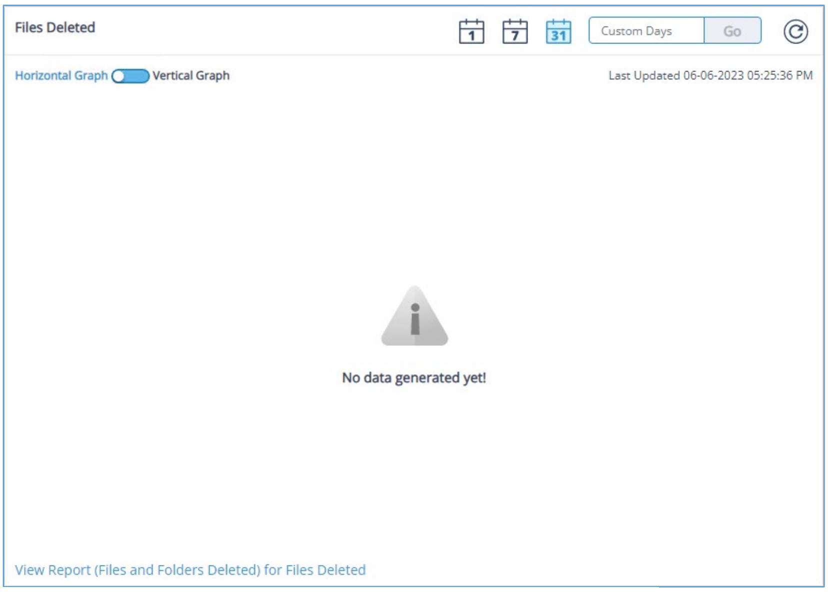


Figure 52: Saved Chart

- Once saved, you can click the Refresh icon to refresh the data and the chart will be displayed:

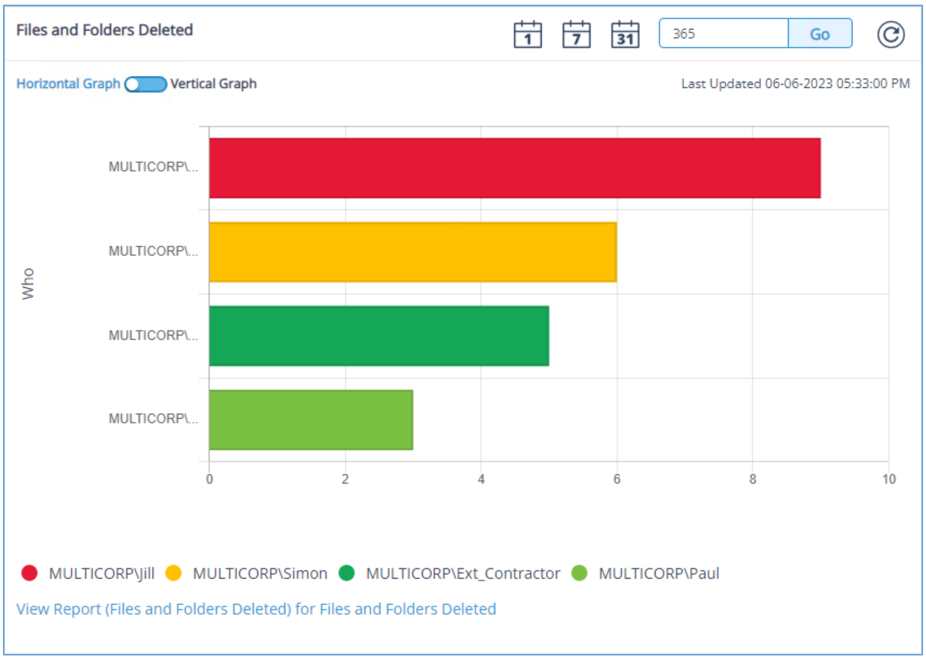


Figure 53: Files and Folders Deleted Chart

- Repeat the above steps to add further charts to your dashboard

11.1 Editing a Customized Dashboard

To edit a Dashboard:

- from the Dashboards screen, select the dashboard that you want to edit and click the **Edit** button

- To edit a chart within the Dashboard, click the Edit Chart icon
- This will display the Edit Graph dialog box. Change the options as required and click **Save**

11.2 Sharing a Dashboard

Customized dashboards can be shared and the steps to do this are as follows:

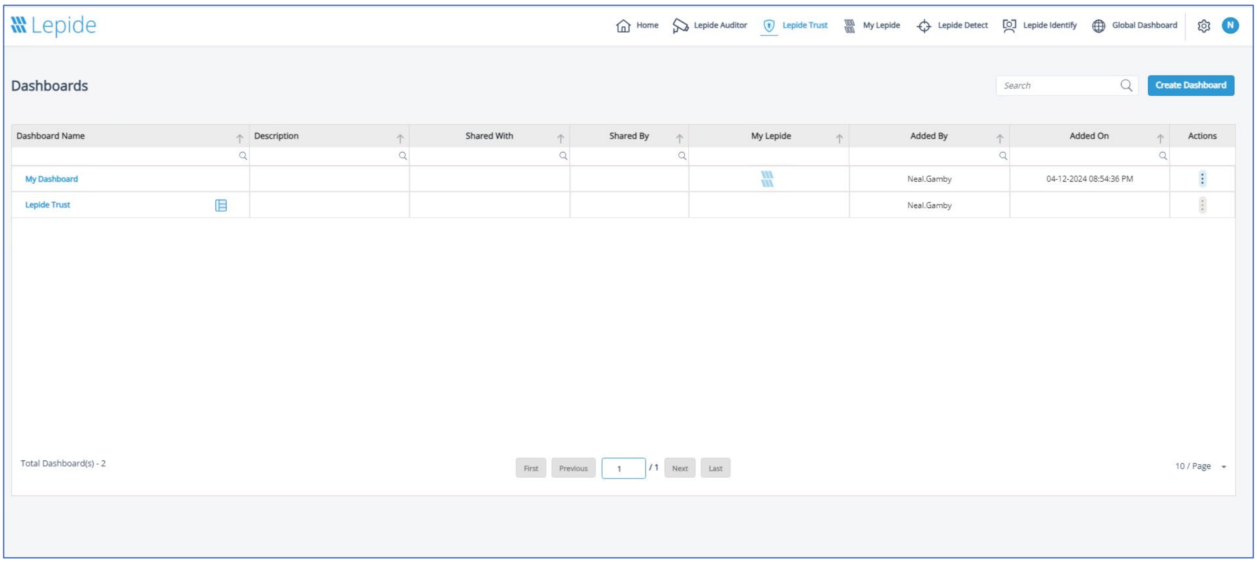


Figure 54: Dashboards Window

- From the Dashboards window, click the icon in the Actions column next to the dashboard you want to share

The following menu will be displayed:

Figure 55: Dashboard Options Menu

- Click the Share icon:

The Select Users or Groups dialog box is displayed:

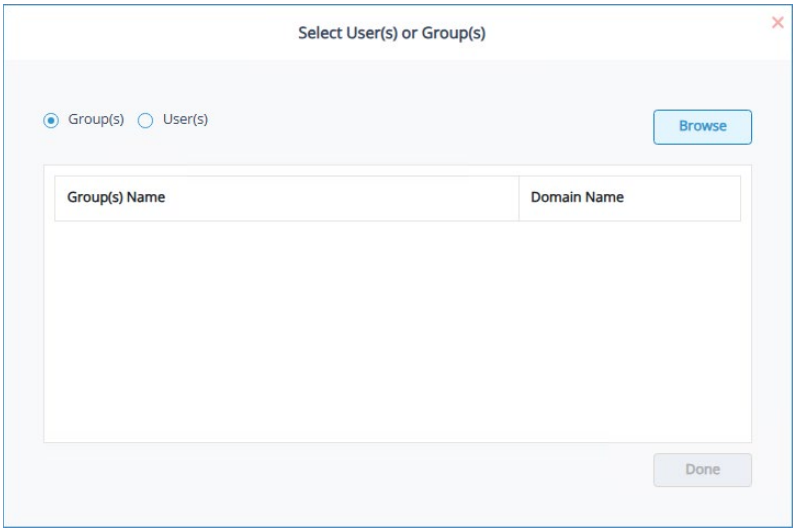


Figure 56: Select Users or Groups

- Select Groups or Users and click the Browse button to see a list of Groups or Users

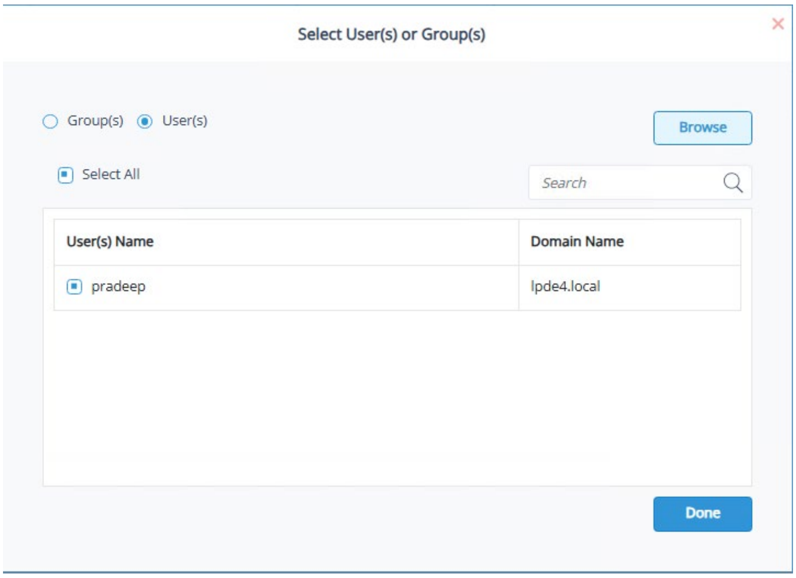


Figure 57: Select the Users or Groups to Share With

- Select the names of the Users or Groups you want to share the Dashboard with
- Click **Done** when finished

11.3 Dashboard Examples

Here are some examples of the Dashboards available within the Lepide Web Console:

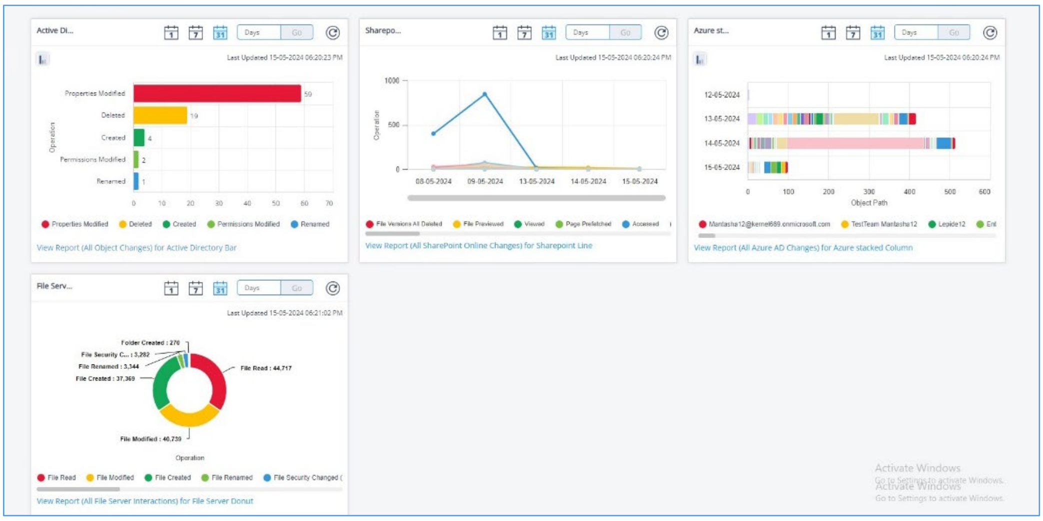


Figure 58: Dashboard with Example Charts

12 Creating a Custom Folder

Custom folders can be created in the Lepide Web Console providing an easy way to locate and run your frequently used reports.

To create a custom folder:

- From the Reports screen, select **Create Folder**

The Create Folder dialog box is displayed:

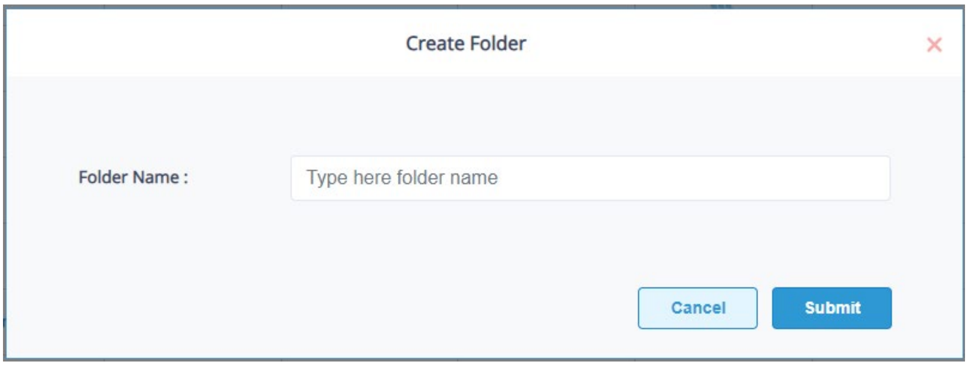


Figure 59: Create Folder

- Type a folder name and click **Submit**

A message box appears showing the folder has been created successfully:

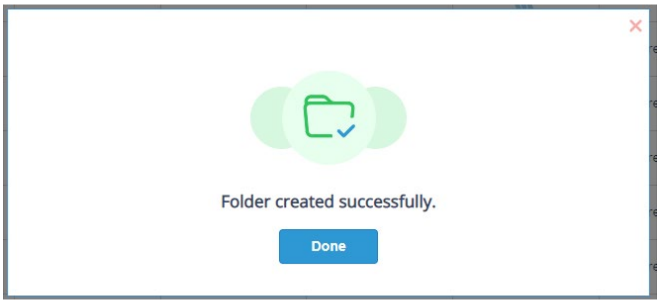


Figure 60: Folder Created Successfully

- Click **Done**

The custom folder will be displayed in the folder list on the left-hand side of the Reports Screen:

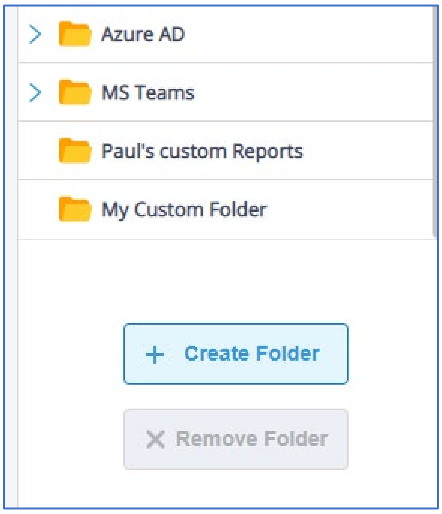


Figure 61: Custom Folder in Folders List

- Now when you create a customized report, you can save it in your custom folder

13 Remove, Move or Share a Report

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

13.1 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

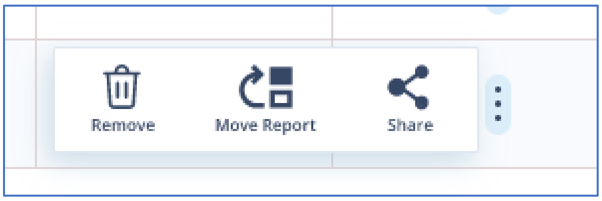


Figure 62: Remove, Move or Share

- Choose **Remove**

The following dialog box will appear:

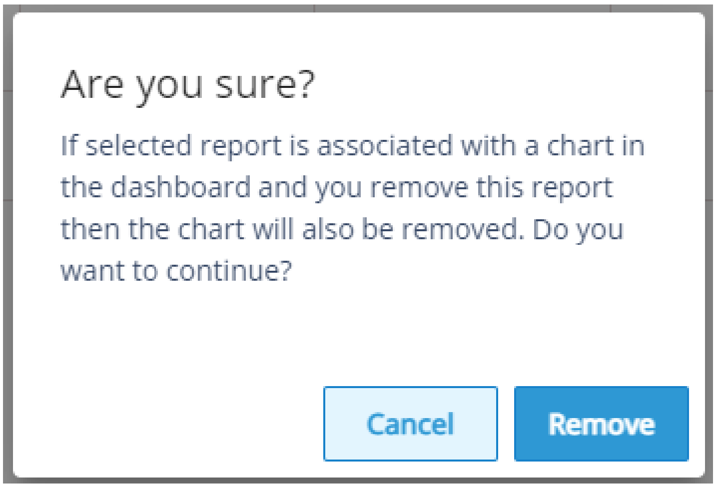


Figure 63: Confirmation to Remove a Report

- Click **Remove** to remove the report

13.2 To Move a Custom Report

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

The Select a Folder dialog box is displayed:

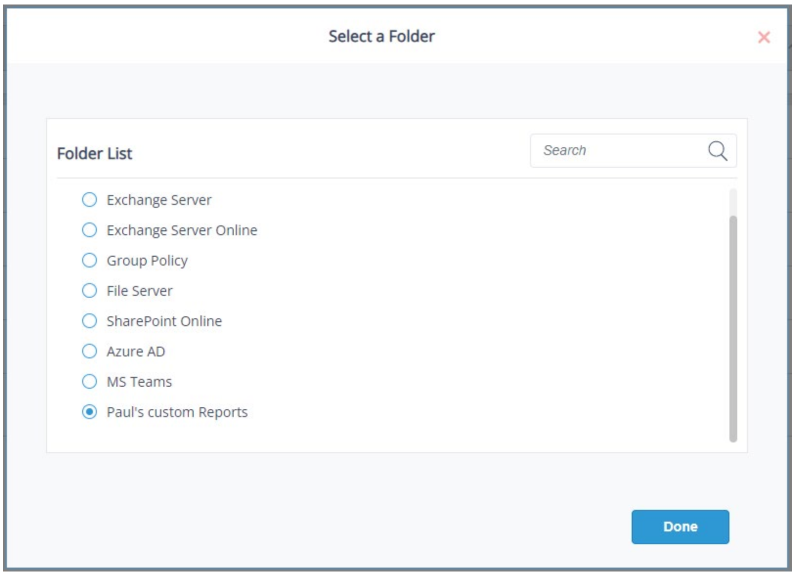


Figure 64: Select a Folder

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

13.3 To Share a Report

- Click the icon and choose Share Report

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

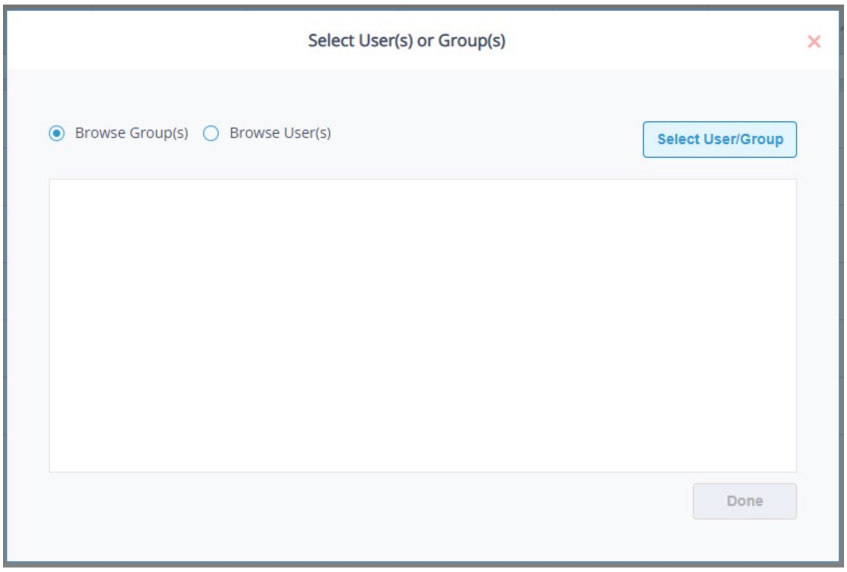


Figure 65: Select Users or Groups

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

A list of users or groups will be displayed:

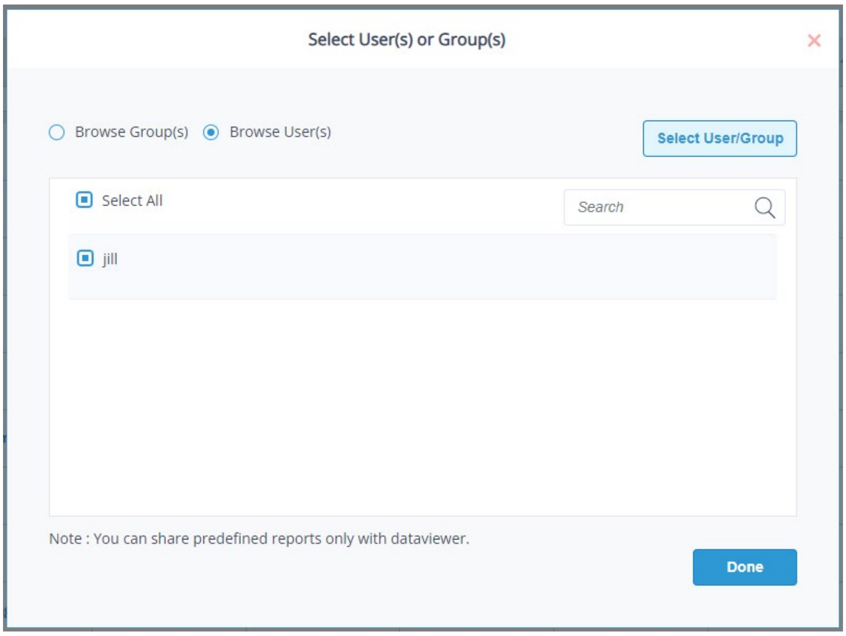


Figure 66: Select the User(s)

- 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:

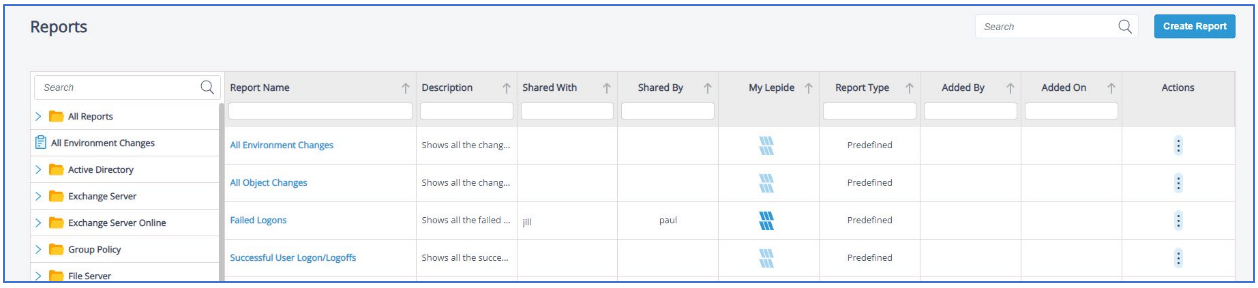


Figure 67: Share Information

14 Alerts

Real time alerts for all significant security changes are an essential tool to enable organizations to quickly detect and respond to potential threats. All alerts are in real time and are delivered to administrators or selected recipients either to the Lepide Dashboard, via email or directly to any iOS or Android mobile device.

The Lepide Web Console can be configured to execute a customized script whenever an alert is triggered. Scripts can be of the following types: VB Script, PowerShell Script or Batch File.

Using custom script execution, you can shut down users, servers and take other actions to mitigate the effects of a security breach.

Alerts can be set up by either using one of the pre defined Threat Models or by setting up an Alert on a report. In this guide, we will look at both methods.

14.1 Alert Status

- To see a list of Alert Reports, select **Alert Status**

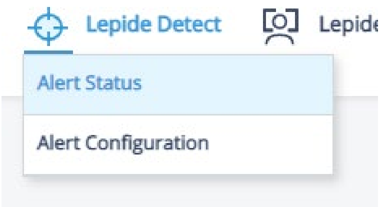


Figure 68: Alerts Menu

This will display the Alert Status screen. Here any Alert Reports which have run will be displayed

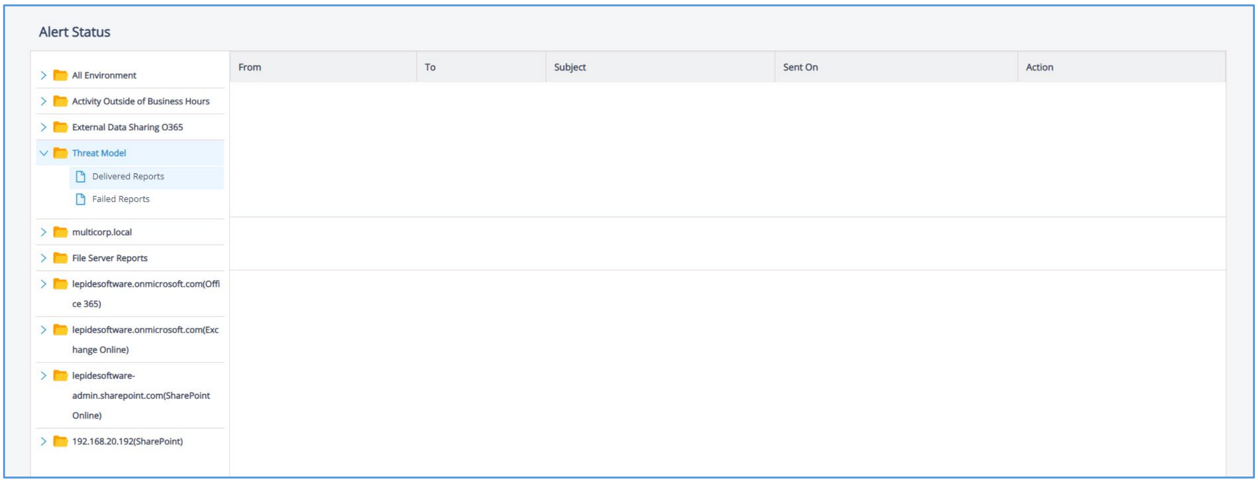


Figure 69: Alert Status

14.2 Alert Configuration

All Alerts are set up from the Alert Configuration screen which is accessed as follows:

- From the Dashboard screen choose **Lepide Detect**, **Alert Configuration**

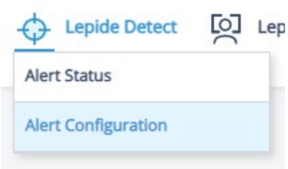


Figure 70: Alerts Menu

The Alert Configuration screen will be displayed:

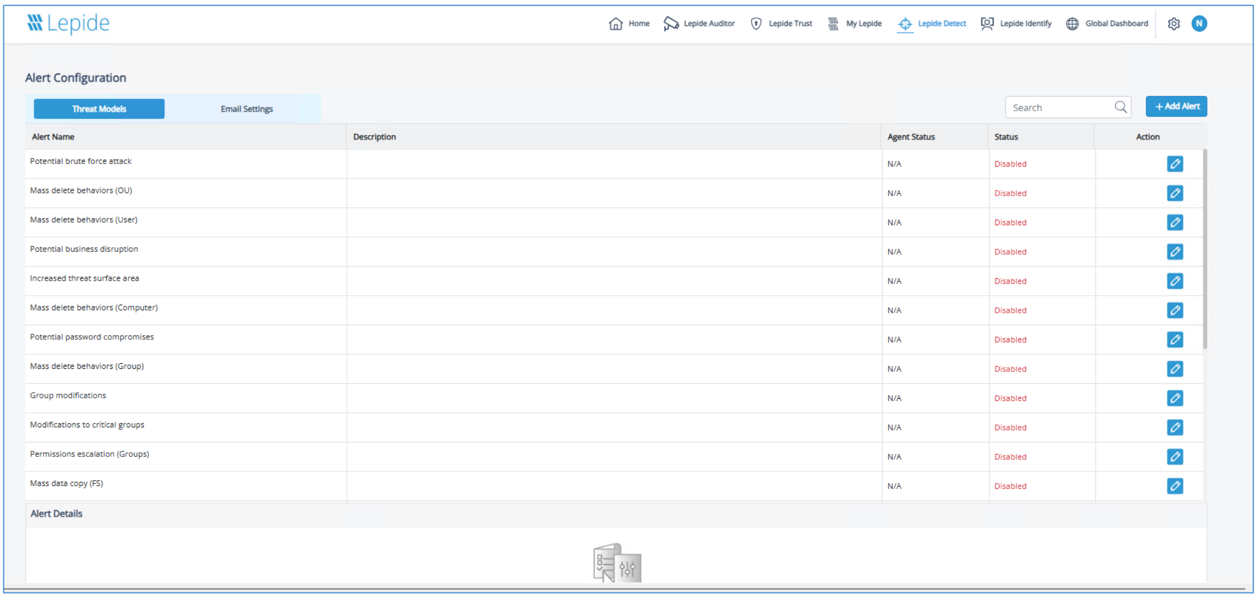


Figure 71: Alert Configuration

14.3 Threat Models

- There are many threat models included with the Lepide Web Console. A threat model is a predefined alert for a particular scenario and examples of scenarios could be a potential ransomware attack, or files copied. Enabling one of these predefined threat models allows you to generate real time alerts whenever a potential threat is detected

All the threat models available within the Lepide Web Console are displayed on the Alert Configuration screen, under the **Threat Models** tab:

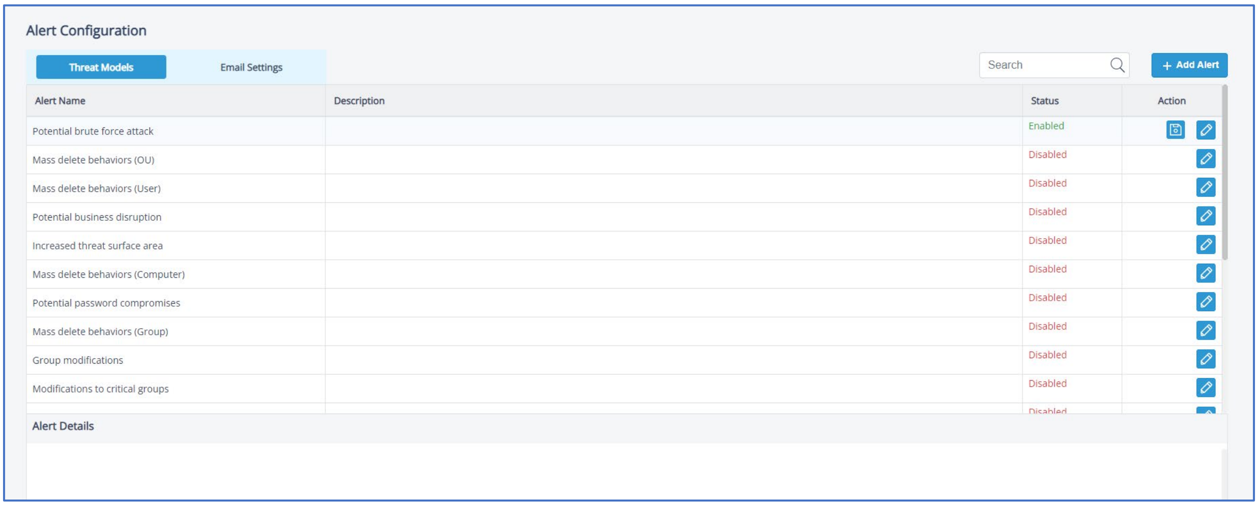


Figure 72: Threat Models

The Threat Models can be enabled as needed. They can then be configured to generate an alert and respond to a threat. The example below explains how to enable the **Potential Ransomware Attack Threat Model**.

14.3.1 How to Enable and Configure a Threat Model

- From the Alert Configuration screen scroll down until you can see the Threat Model you want to enable. You can also type into the search bar at the top to search for a specific Threat Model.

- To enable the Potential Ransomware Attack Threat Model, click the Edit icon  .

The Edit Alert dialog box will be displayed:

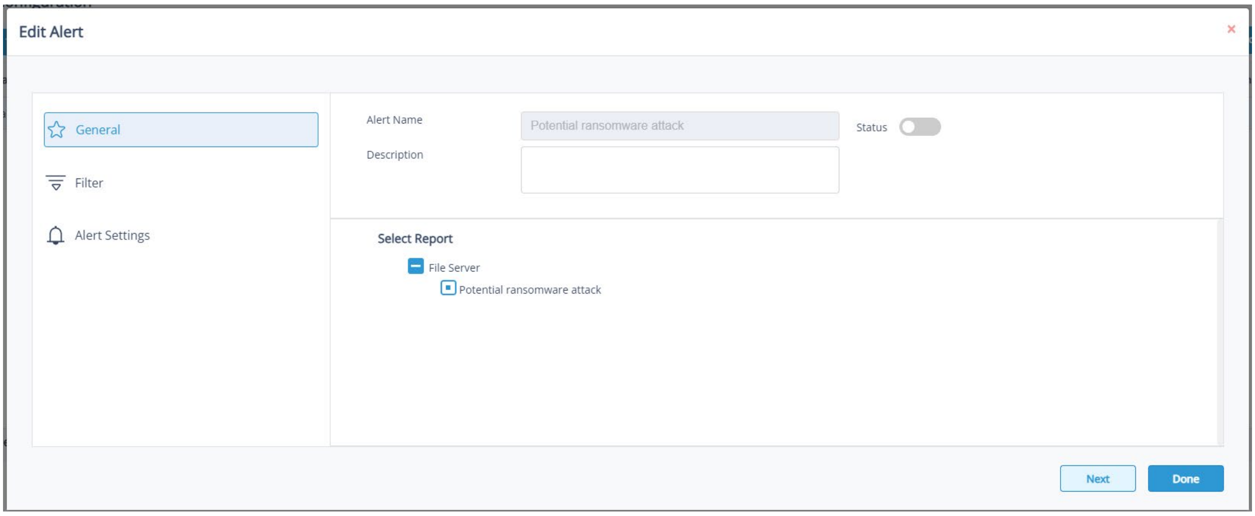


Figure 73: Enable a Threat Model

- Slide the **Status** toggle button to the right to enable the Threat Model
- Click **Next**

This will take you to the **Filter** option:

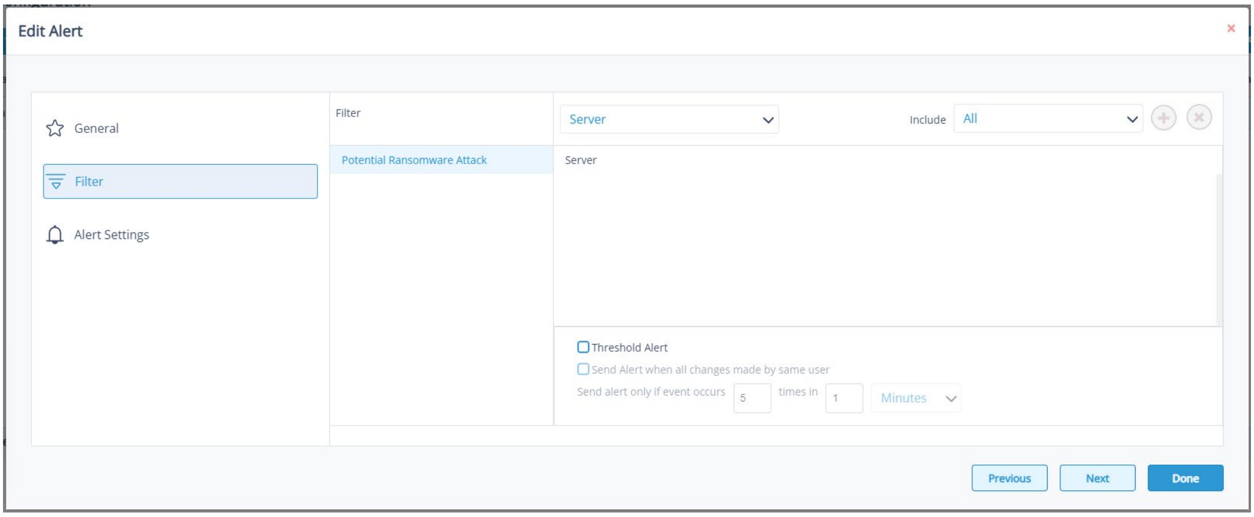


Figure 74: Filter Option

- On the left of the dialog box, you can see the Threat Model you are working on which is **Potential Ransomware Attack**.
- Click the Server drop down to select options to change the settings for **Server, User, Object Name, Object Path, Operation, Process and From**. The default setting for all these options is **All**.
- The threshold alert options can be customized as follows:

Threshold Alert:	Check this box to switch threshold alerting on
Send alert when all changes made by same user:	Check this if you want an alert to be sent when all changes have been made by a single user
Send alert only if event occurs:	Change the number of times the event occurs, the time value and time-period here

- Click **Next**

The Alert Settings are shown:

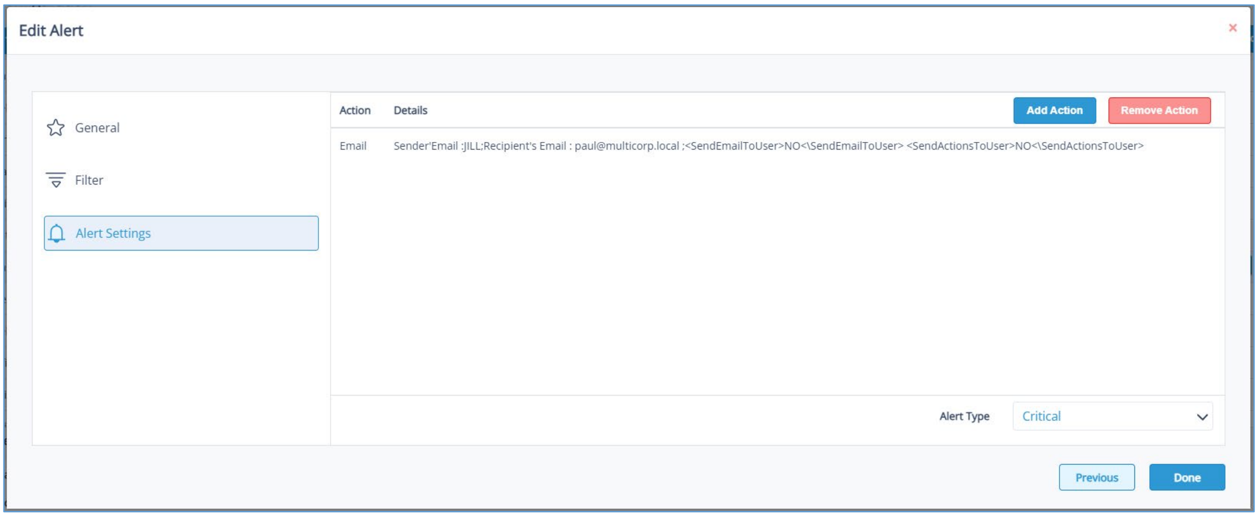


Figure 75: Alert Settings

This allows you to set up responses to occur when an alert has been triggered and displays any existing responses which have been set up. You can also change the **Alert Type**.

- To create a new response to an alert, click the **Add Action** button
- The **Alert Action** dialog box is displayed:

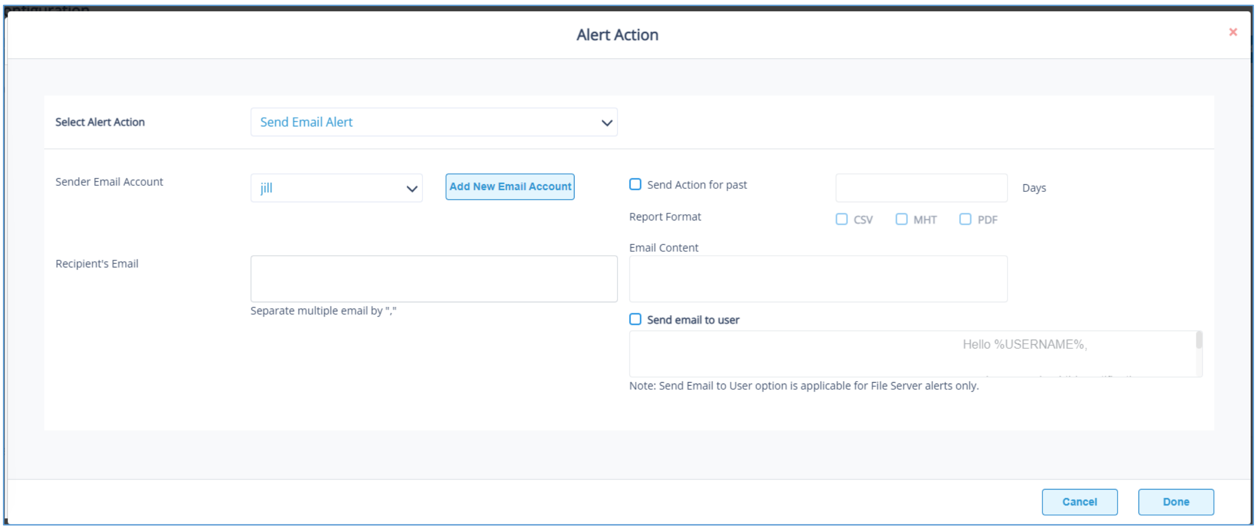


Figure 76: Alert Action

- Click the **Select Alert Action** drop down arrow to see a list of actions available:

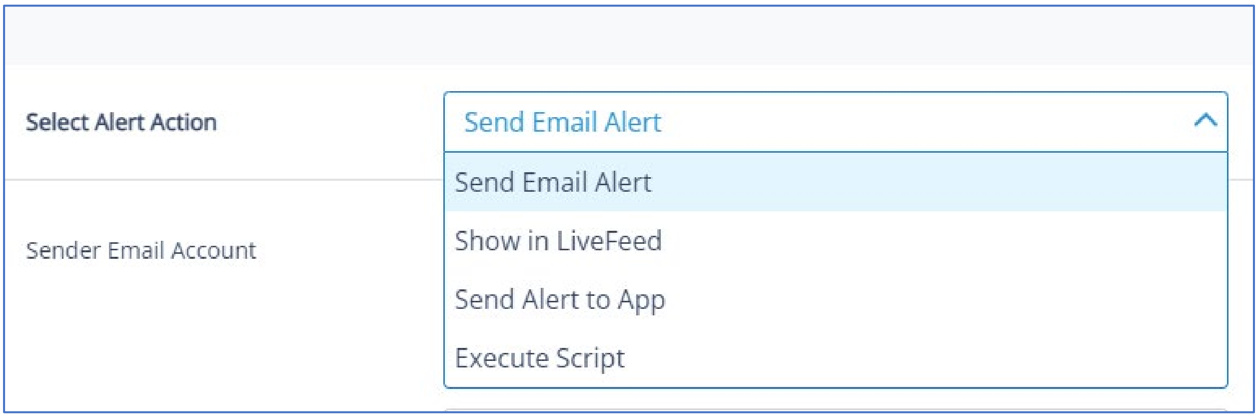


Figure 77: Alert Actions

The Alert Actions are as follows:

- Send Email Alert
- Show in LiveFeed
- Send Alert to App
- Execute Script

- The configuration of each of these actions is explained below:

1. Send Email Alert

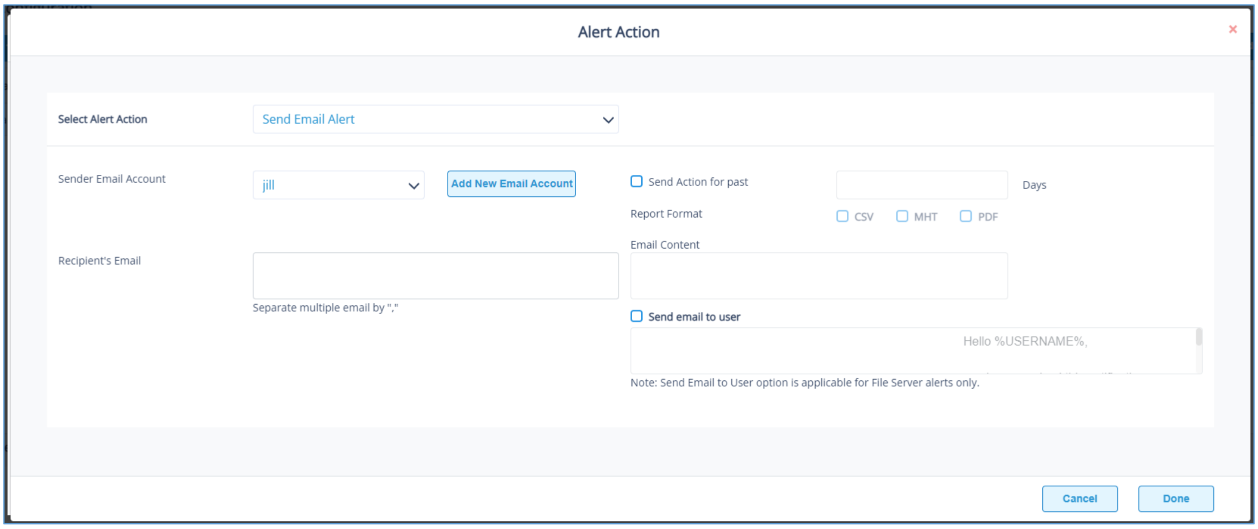


Figure 78: Send Email Alert

This option allows you to send an email once an alert has been triggered. The elements of the dialog box are as follows:

- **Sender Email Account:** The Sender's email account will be displayed here if it has been selected.
- Click **Add New Email Account** to enter a new Sender Email Account.
  For further information on adding a new email account, please refer to Section 14.4 of this guide.
- **Recipient's Email:** Add recipient emails by typing the email addresses into the box. If there are multiple email addresses. separate them with a ','
- **Send Actions for past xx days:** This option allows you to see everything that this user has done over the last number of specified days. For example, if an alert is triggered because they have been copying files, then you may want to see what else they have been doing. Check this box and specify the number of days and an email will be sent with an attachment listing everything that the user has done over the specified number of days.
- **Report Format:** The attachment will contain a report and the format(s) can be specified by checking the relevant box. The formats are CSV, MHT and PDF.
- **Email Content:** Type the content of the email to be sent here
- **Send Email to user:** Check this box to send an email to the user. The content of the email can be typed into the text box. To include the username within the content, use the variable %USERNAME%. **Note** that this option is only applicable to File Server alerts.
- Click **Done** to save the alert action.

2. Show in LiveFeed

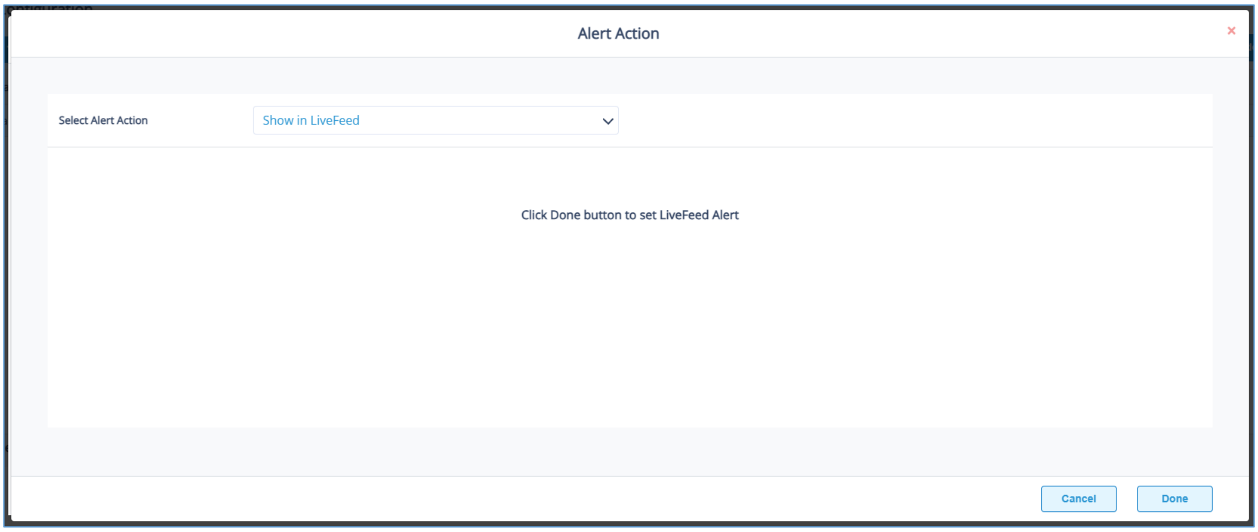


Figure 79: Show in LiveFeed

Show in LiveFeed means that the alert will be sent to the LiveFeed dashboard which can be seen on the Lepide Detect Dashboards screen.

- Click **Done** to switch the **LiveFeed** alert on.

3. Send Alert to App

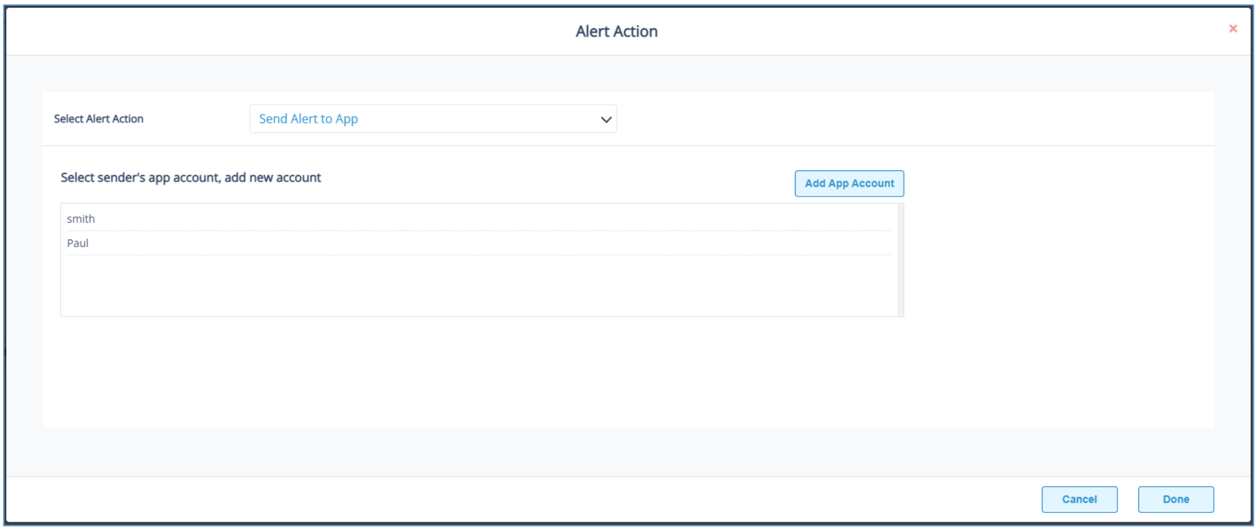


Figure 80: Send Alert to App

- The **Send Alert to App** option sends the alert to a mobile device.
- Click **Add App Account** to add a new mobile account. For further information on adding a new App Account, please refer to Section 14.4 of this guide.

4. Execute Script

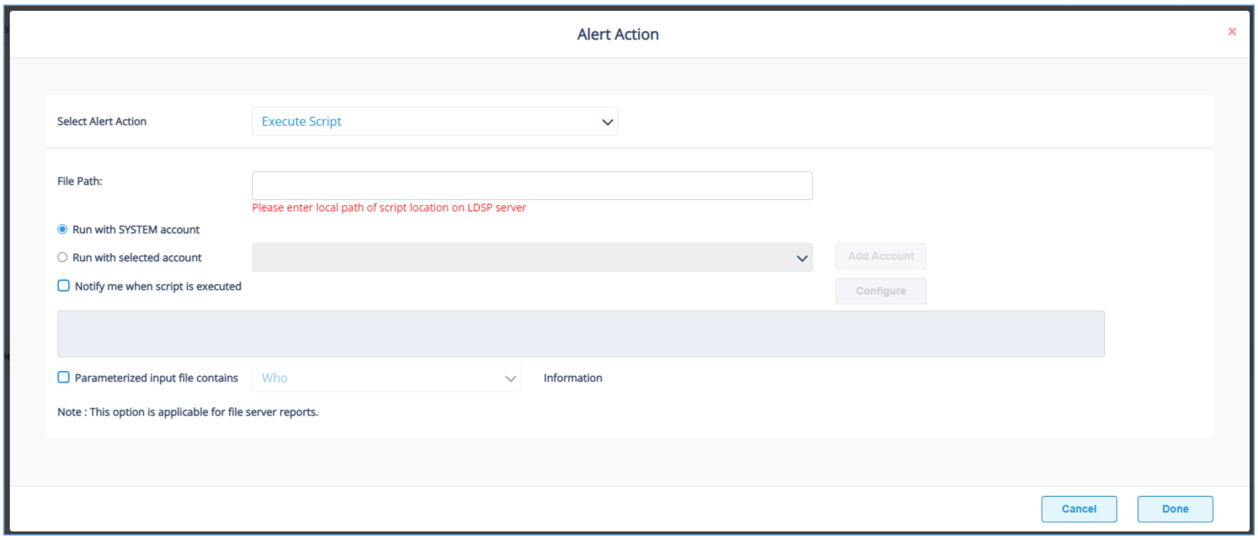


Figure 81: Execute Script

The last action from the drop-down menu is **Execute Script**

This sets up the option to execute one of the predefined PowerShell scripts when an alert is triggered.

The elements of the dialog box are as follows:

- **File Path:** Browse to choose the file path of the PowerShell script by clicking ...

  Choose either: Run with SYSTEM account or

  Run with selected account.

- If you choose **Run with selected account**, you can use the drop-down to select the account or click **Add Account** to specify the account to be used.
- Choose **Notify me when a script is executed** to send an email on script execution.
- When this option is checked, the **Configure** button becomes available. Choose **Configure** to set up the sender's account and recipient's email address.
- Choose **Parameterized input file contains** to specify a variable to include in the script. When this option is checked, a drop-down menu becomes available to choose a variable:

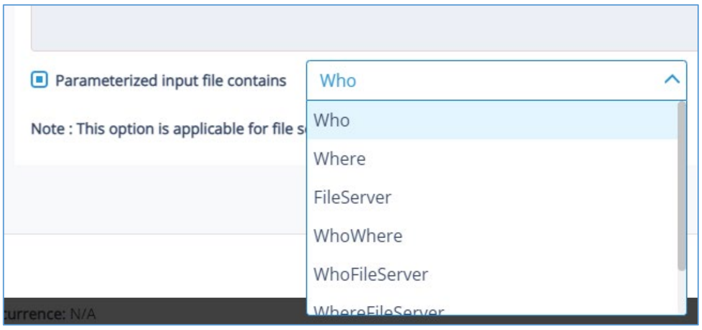


Figure 82: List of Variables

- Click **Done** to return to the **Alert Settings**
- Now choose the **Alert Type** which can be Critical, Warning or Normal
- Click **Next** to continue
- The **Confirmation** dialog box is displayed with the alert details
- Click **Done** to finish

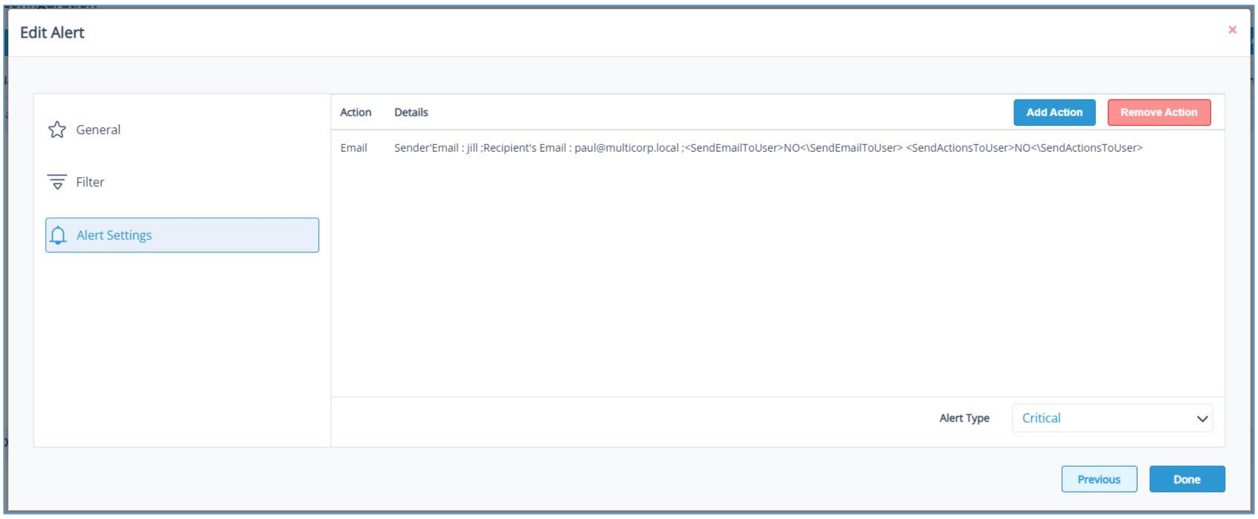


Figure 83: Edit Alert

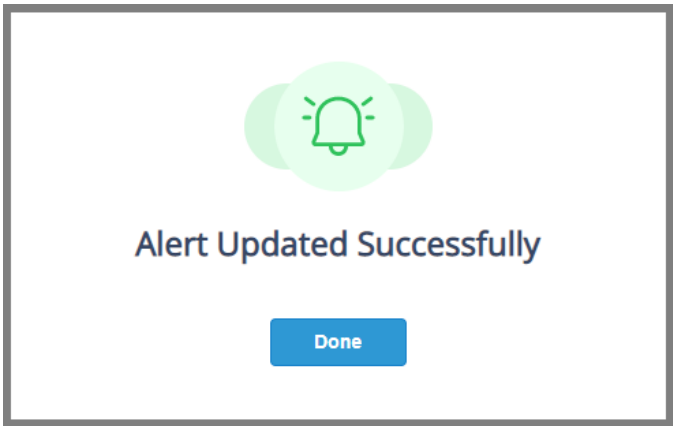


Figure 84: Alert Updated Successfully

14.4 Setting Alerts

To set up alerts without using a threat model, follow the steps below:

- From the Alert Configuration screen, select **+ Add Alert**

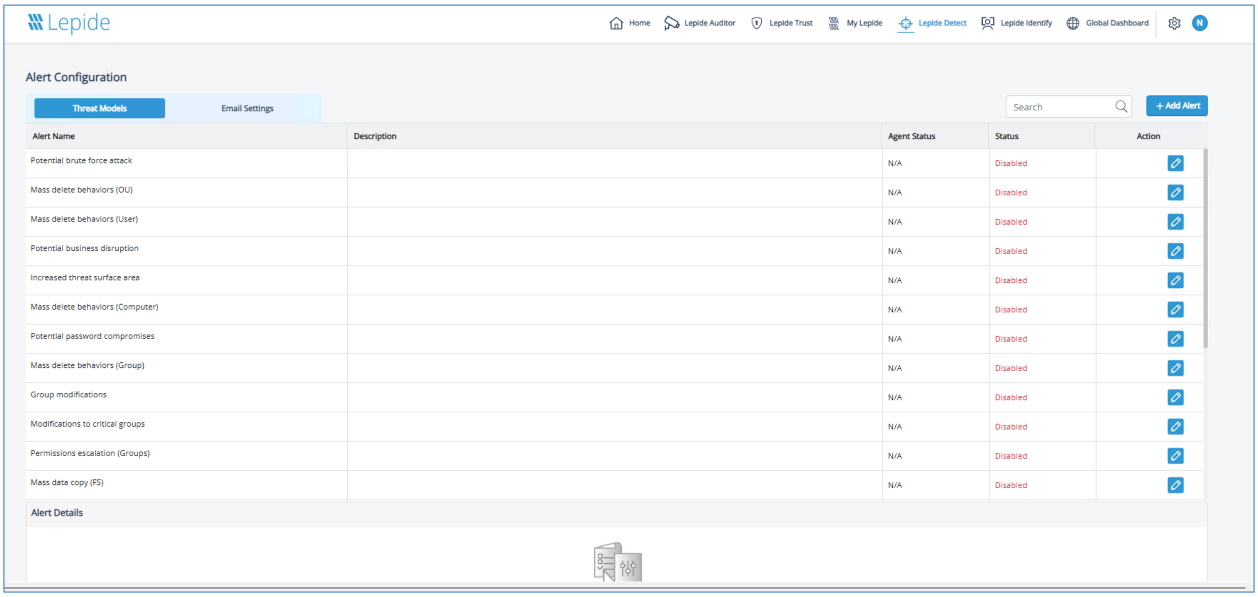


Figure 85: Alert Configuration

The Add Alert dialog box is displayed:

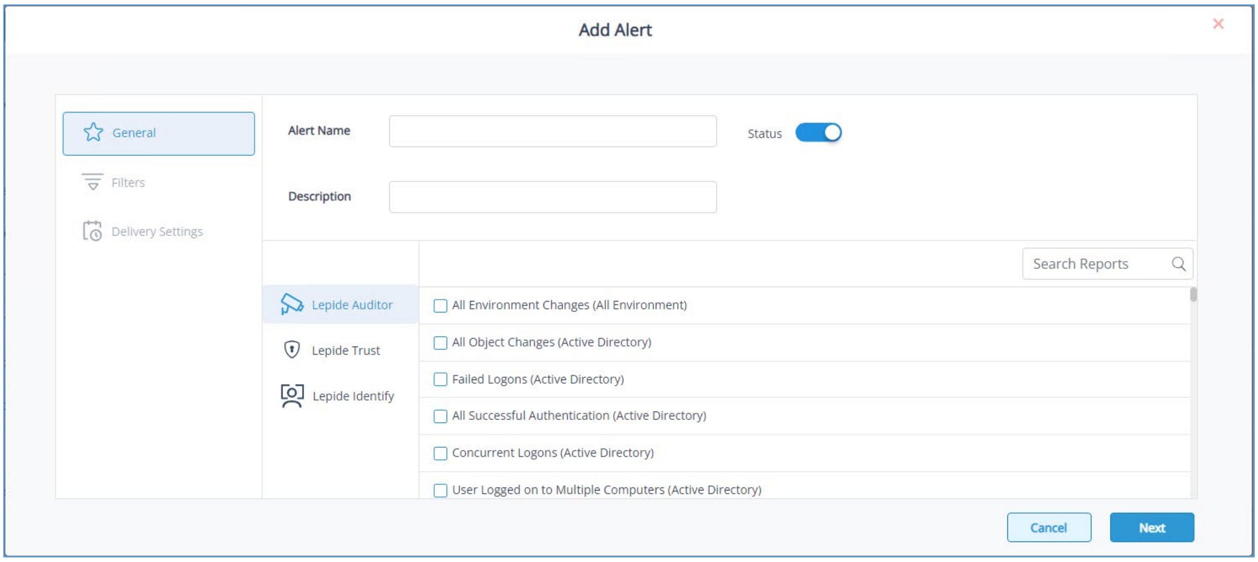


Figure 86: Add Alert

- Add the Alert Name and optional Description
- Select the report(s) on which you want to create an alert
- Click **Next**

The Add Filters option is displayed:

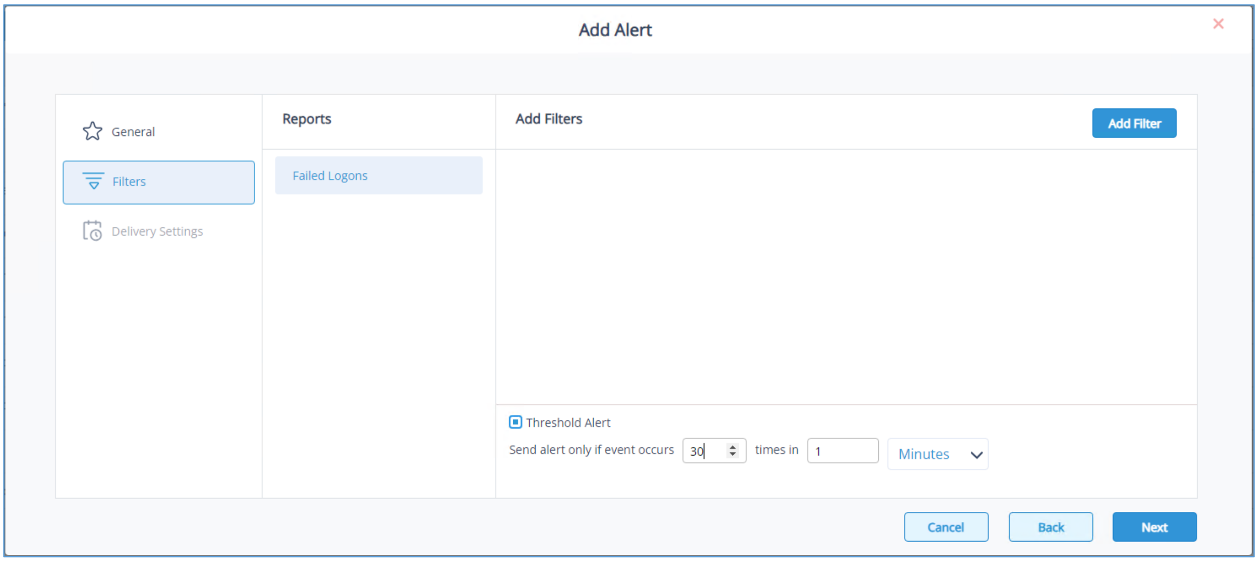


Figure 87: Add Filters

- Click the **Add Filter** button to add a new filter

The Add Filters options are displayed:

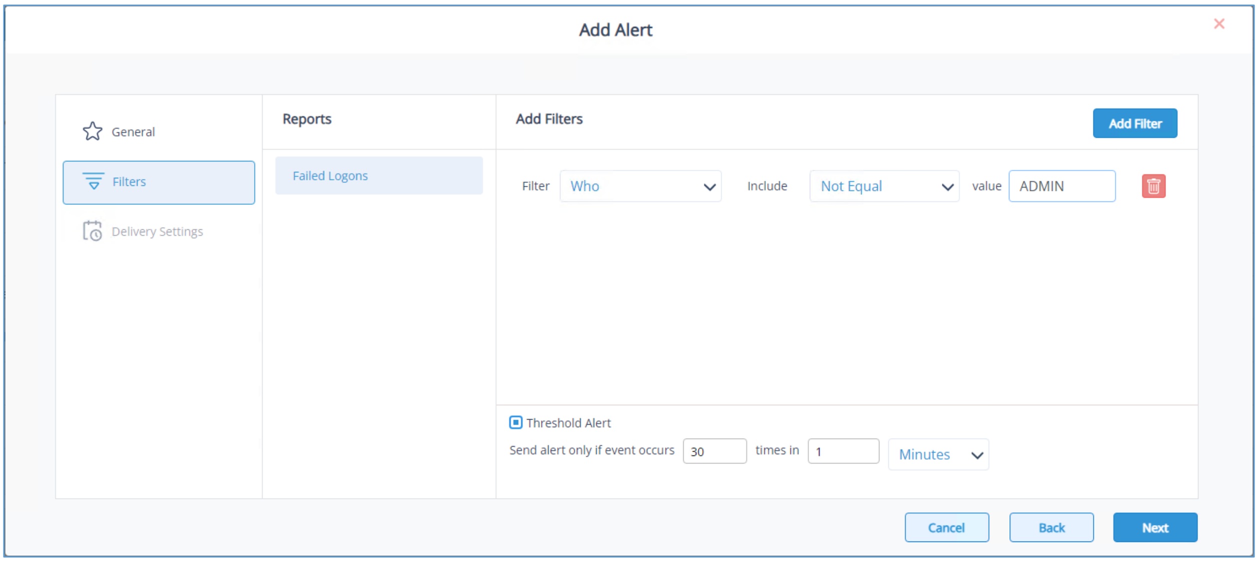


Figure 88: Filter Options

- Select the filter options
- Click the **Add Filter** button again to add more filters if required
- The threshold alert options can be customized as follows:

Threshold Alert:	Check this box to switch threshold alerting on
Send alert only if event occurs:	Change the number of times the event occurs, the time value and time-period here

- Click **Next**

The Delivery Settings options are displayed:

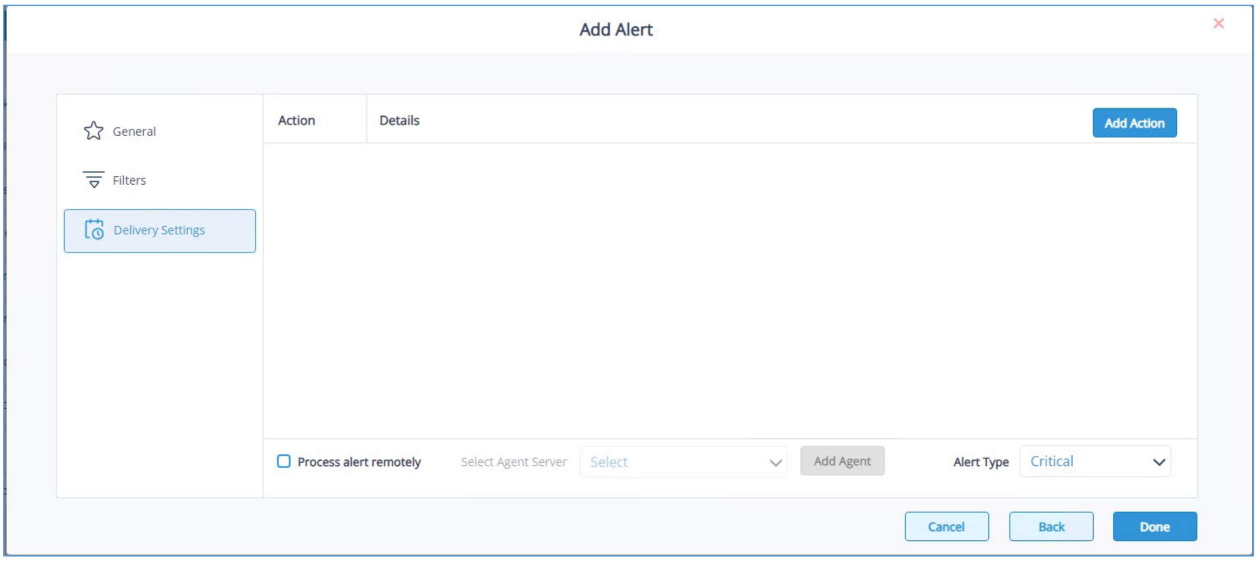


Figure 89: Delivery Settings

- Click **Add Action** to add a delivery action

The Configure Report Delivery Action dialog box is displayed:

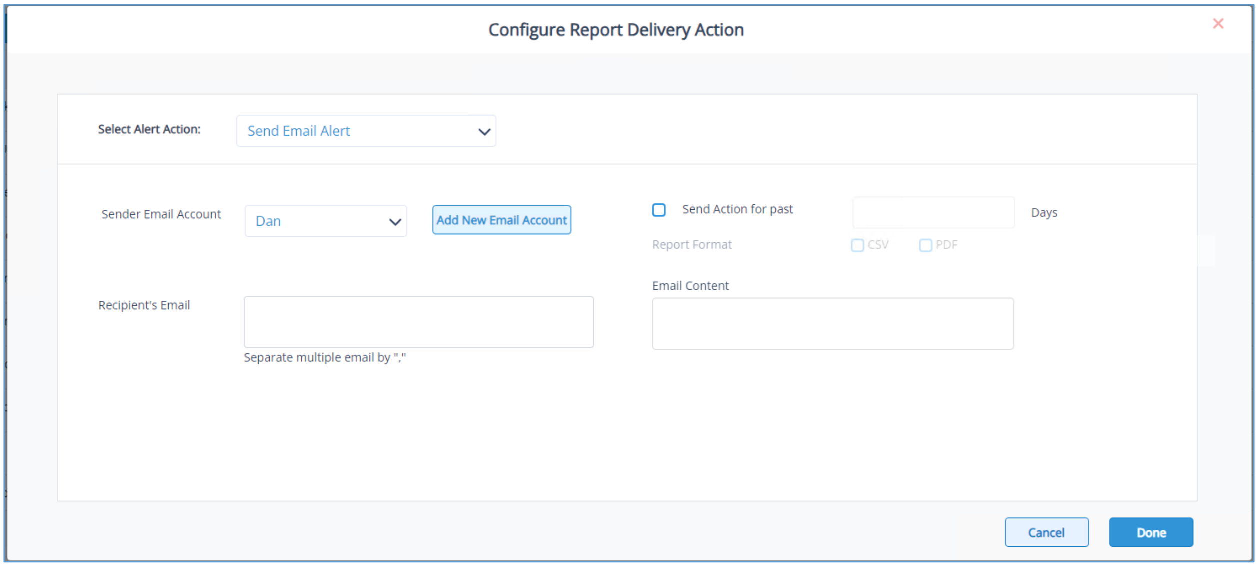


Figure 90: Configure Report Delivery Action

- Select the Alert Action

This can be one of the following options:

- Send Email Alert
- Show in LiveFeed
- Send Alert to App
- Execute Script

In this example, **Send Email Alert** has been selected:

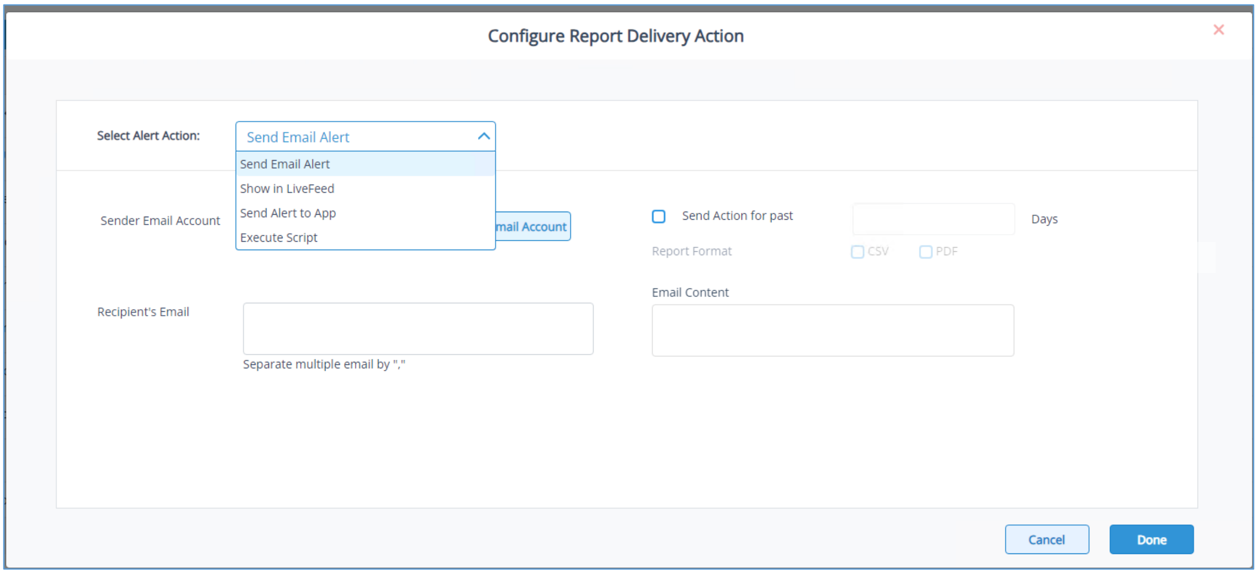


Figure 91: Select Alert Action

- Specify the Sender Email Account
- Click **Add New Email Account** to add a different email account if required
- Select Send Action for past xx days if required
- Select the **Report Format**. This can be CSV or PDF
- Specify the **Recipient's Email**. For multiple email addresses, separate them with a ','
- Specify the **Email Content** to be included in the email when an alert is triggered
- Click **Done** when finished

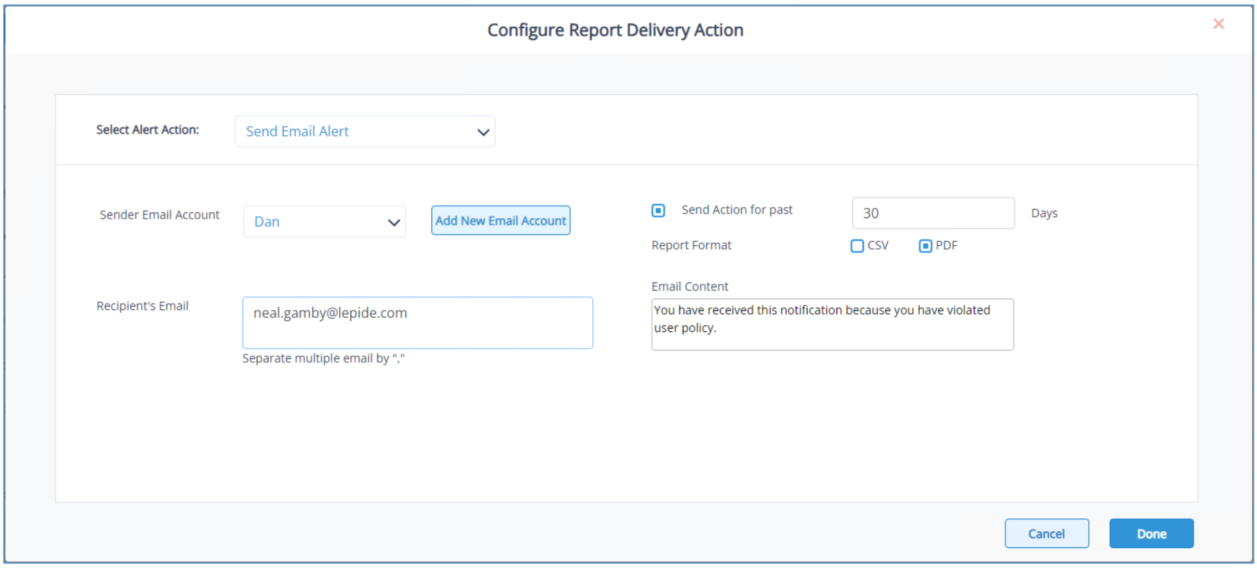


Figure 92: Configure Report Delivery Action Completed

The alert is displayed in the Add Alert dialog box:

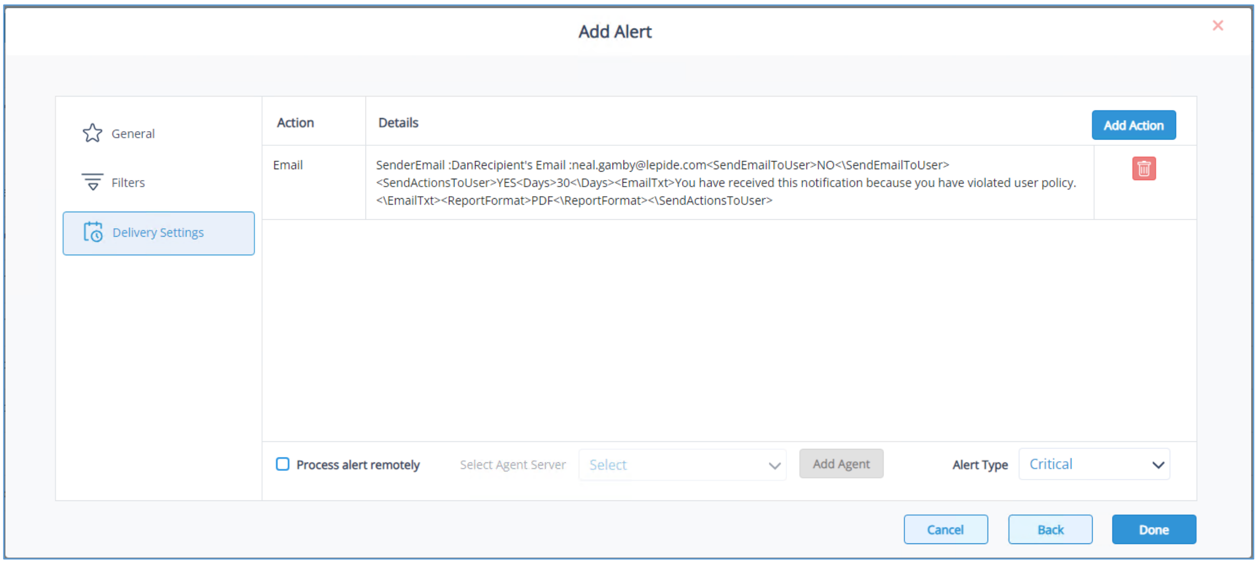


Figure 93: Add Alert

- Select Process alert remotely if required.
- To do this you will need to specify an Agent from the **Select Agent Server** drop down list.
- If you need to add an Agent, select the **Add Agent** button and follow the steps in Section 14.5 of this guide.
- Specify the **Alert Type**. This can be Critical, Warning or Normal.
- Click **Done** when finished.
- The Alert will be displayed at the end of the list and will show as **Enabled.**

- Click on the Alert Name to display **Alert Details** at the bottom of the screen.

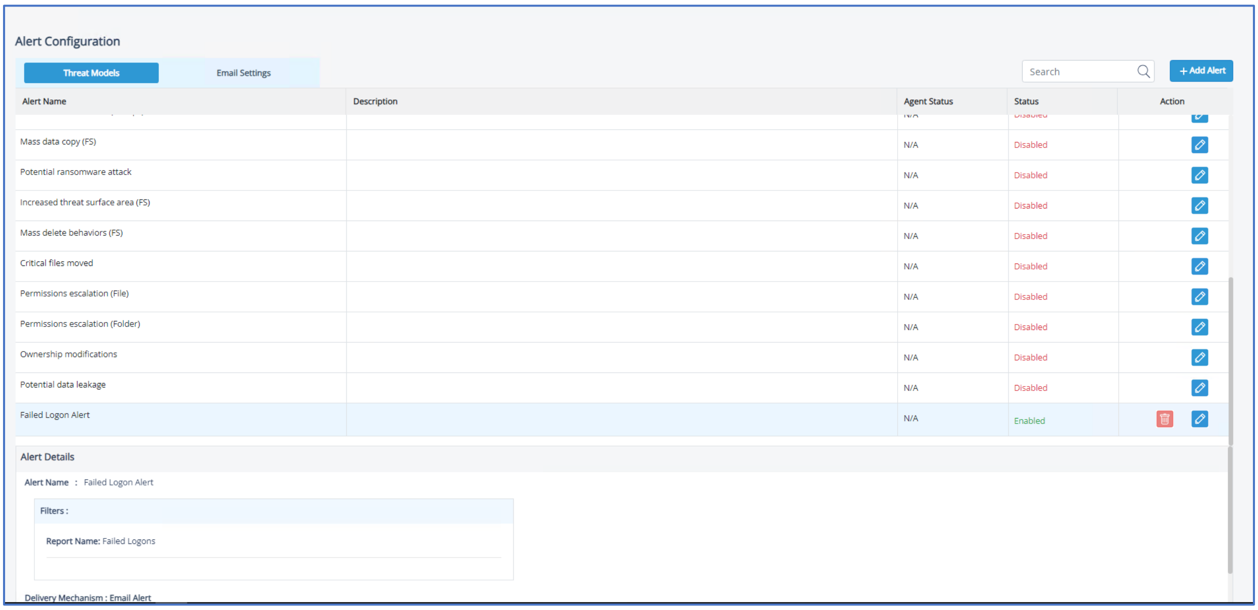


Figure 94: Alert Configuration with Alert Details

- To delete the alert, click the **Delete** icon 

- To modify the alert, click the **Edit** icon 

14.5 Adding an Agent

Before adding an Agent, the agent will need to have been installed. For information about this, please see our [e-Discovery User Guide.]

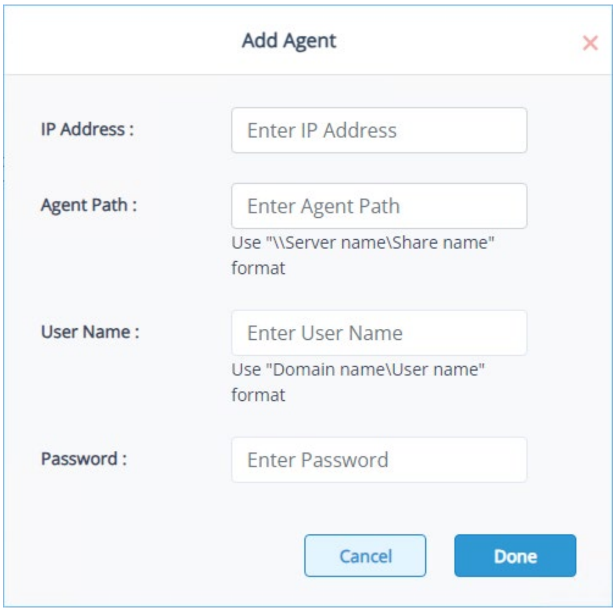


Figure 95: Add Agent

- Add the following information:

− **IP Address:**	Add the IP Address
− **Agent Path**:	Use \\Server name\Share name format
− **User Name**:	Use domain name\User name format
− **Password**:	Enter Active Directory password

- Click **Done** when finished

14.6 Email Settings Tab

Click the **Email Settings** tab to see the Email Settings Options. Here you can set up the Email or App information where the alert will be sent

- To add a new **Email** or **App Account**, click **Add**

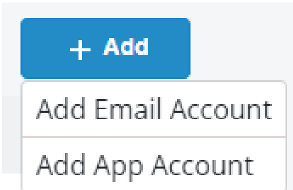


Figure 96: Add Email or Add App

- Select **Add Email Account** to add email account details
- Type the email account information and click **Submit**

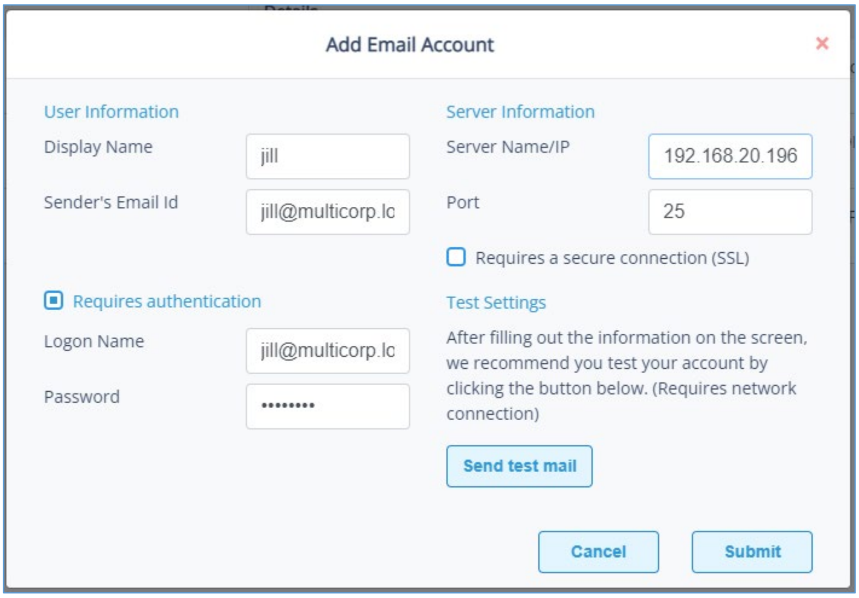


Figure 97: Add Email Account

- The email account details will be listed in the Alert Configuration screen:

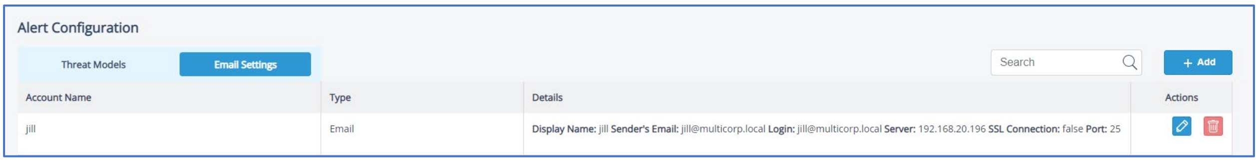


Figure 98: Email Account Details

- Select **Add App Account** to add app account details

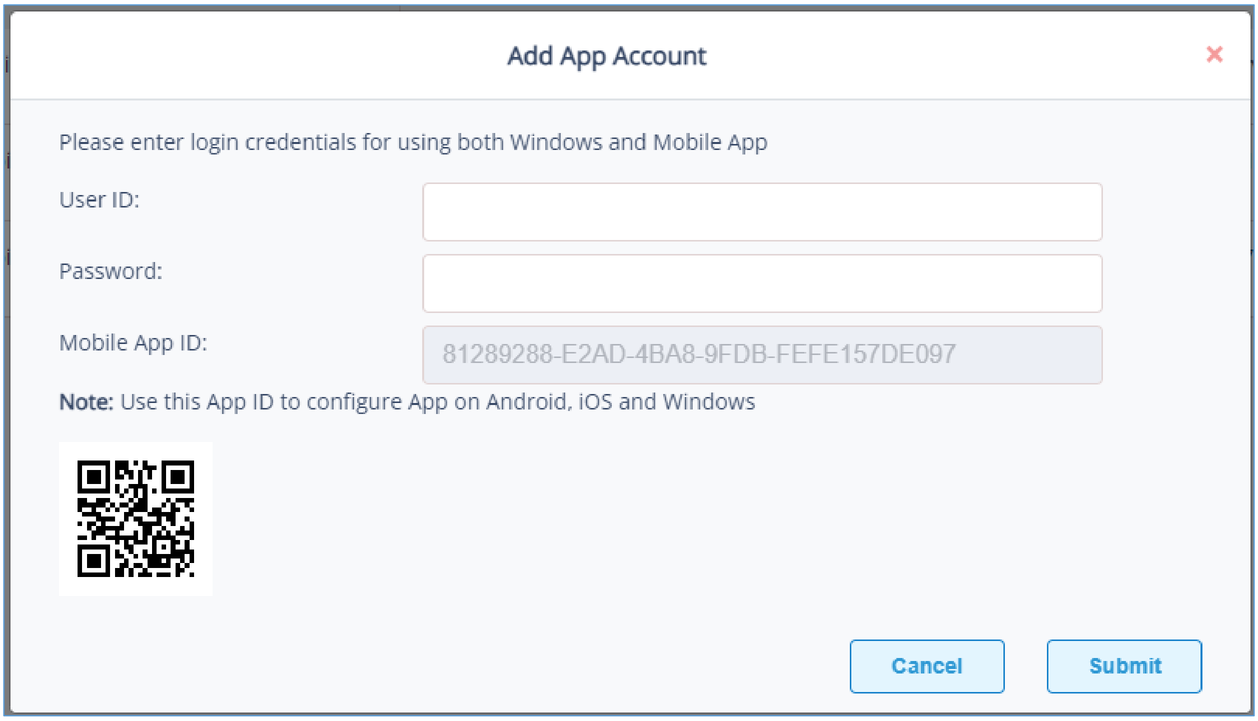


Figure 99: Add App Account

- Enter the **User ID** and **Password**
- Enter the **Mobile App ID** which is generated by using the mobile device to scan the QR code displayed at the bottom of the dialog box.
- Click **OK**

15 Global Dashboards

There is a Global Dashboard available for Copilot which summarizes the predefined Copilot reports to provide an operational overview of Copilot activities. The dashboard does not require any configuration and will load automatically.

To display the dashboard:

- Select **Global Dashboard** from the menu at the top of the screen

The Dashboard will be displayed:

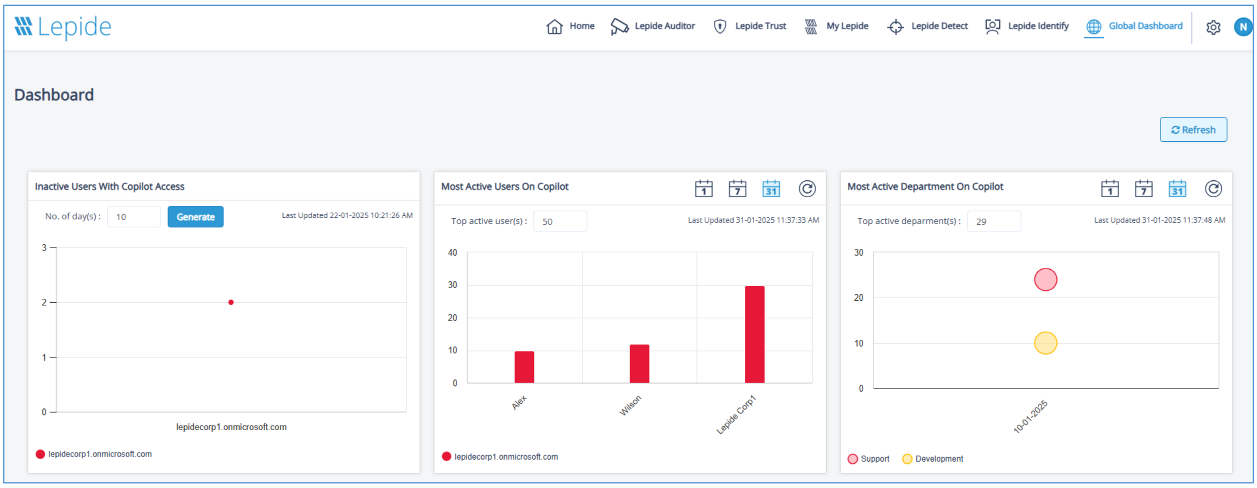
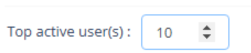
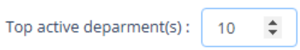


Figure 100: Global Dashboard

- Click the **Refresh** button to refresh all the data
- Click the Refresh icon to refresh data for individual charts
- To change the number of days for the Inactive Users with Copilot Access chart, edit the **No of day(s)** box and click **Generate** to display the chart with the new number of days.
- To change the number of **Top active user(s)**, click the number box and either enter the number or use the arrow selectors to change the number:



- To change the number of **Top active department(s)**, click the number box and either enter the number or use the arrow selectors to change the number:



- To change the time frame for the Most Active Users on Copilot and Most Active Department on Copilot charts, click one of the calendar icons. These options are 1 day ago, 7 days ago, 31 days ago:

16 Admin Console Options

- Click the  icon to open the Admin Console window

The different options available within the Admin Console are described below:

16.1 Role Management

Please see Section 3 of this guide for details about Role Management

16.2 How to View Logs

Activity logs can be viewed from within the Admin Console.

From the Admin Console, select **Logs**

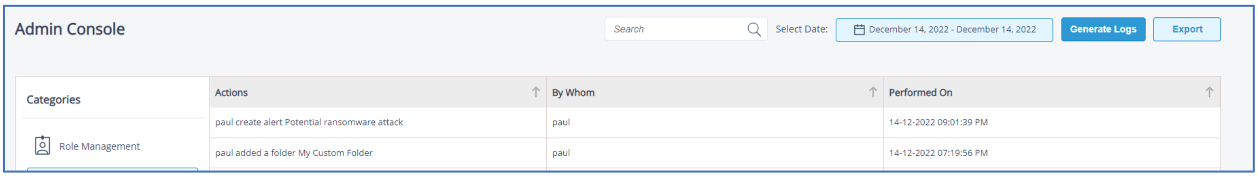


Figure 101: Logs

From here you can:

- Add **Search** criteria and click **Generate Logs** to view logs based on the search text

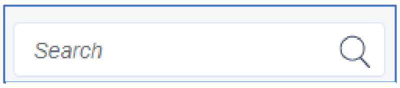


Figure 102: Search Box

- Select **Date** and click **Generate Logs** to view activity for that date/time period

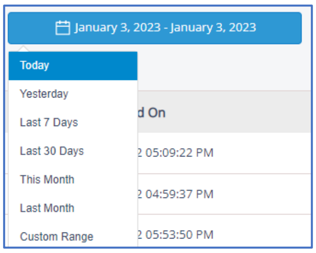


Figure 103: Select Date/Time

- Export the activity logs to **CSV** or **PDF** by clicking the **Export** button

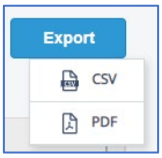


Figure 104: Export Activity Logs

16.3 How to Change the Date and Time Format

The Date and Time format can be changed from within the Admin Console

- From the Admin Console, choose **General Settings**

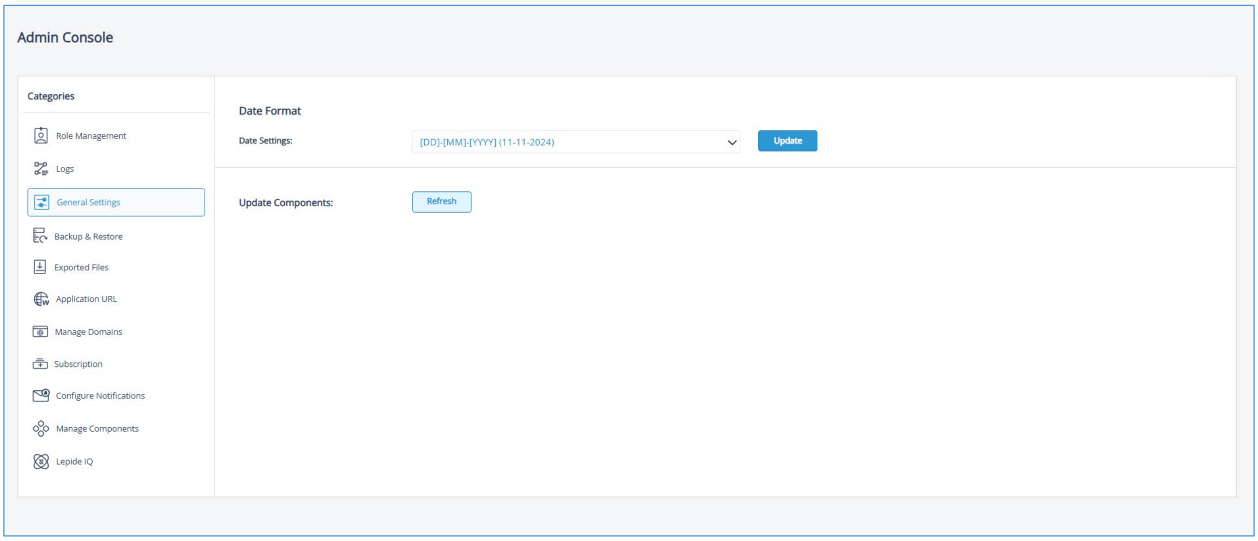


Figure 105: General Settings

- Click **Date Settings** and choose the date setting required
- Click **Update**
- Click **Refresh** to Update Components

16.4 Backup & Restore

Backup and Restore options can be set within the Admin Console.

These options allow you to export and import the database which contains all the configuration options you have chosen in the Web Console including custom reports and folders. Examples of where you may want to use the backup and restore feature include:

- the best practice approach of taking regular backups
- in the event of wanting to migrate the Web Console to a different server

The steps to set up Backup & Restore are as follows:

- From the Admin Console Screen, choose **Backup & Restore:**

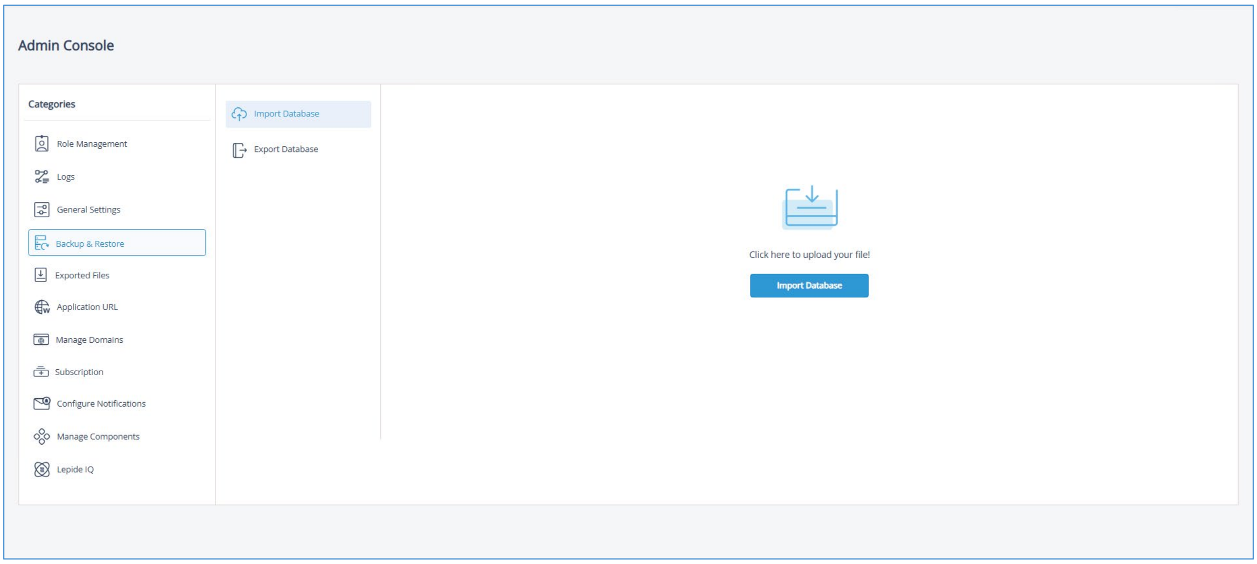


Figure 106: Backup and Restore

- To Import the Database:
- Choose Import Database
- Click the Import Database button
- A list of files in the Download folder appears:

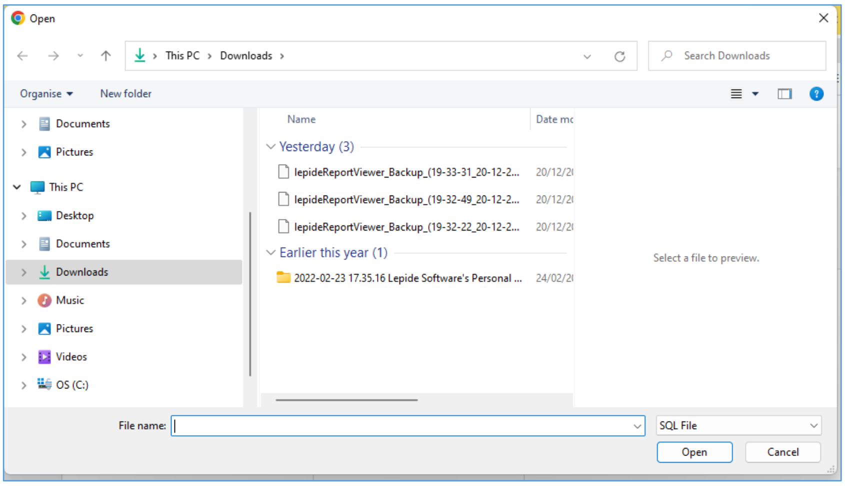


Figure 107: Select Database File to Import

- Select the database file to be imported
- Click **Open**
- A message box appears:

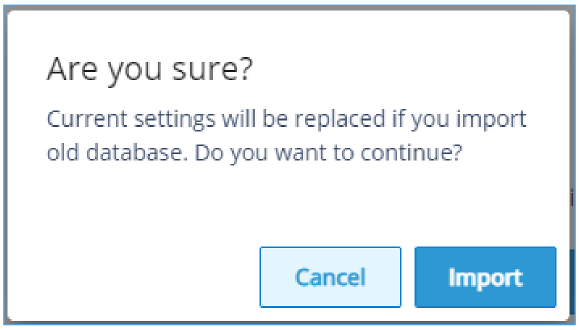


Figure 108: Confirmation to Import Database

- Click **Import** and the following is displayed:

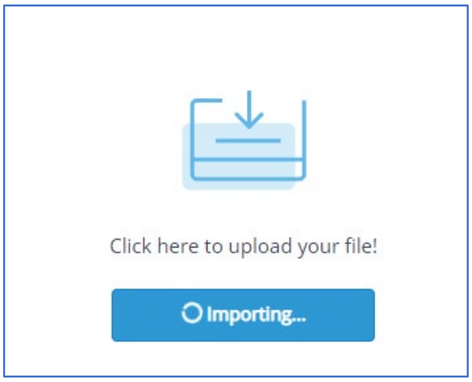


Figure 109: Importing Database

- The import may take some time

- To Export the Database:
- From the Admin Console Screen, select **Export Database:**

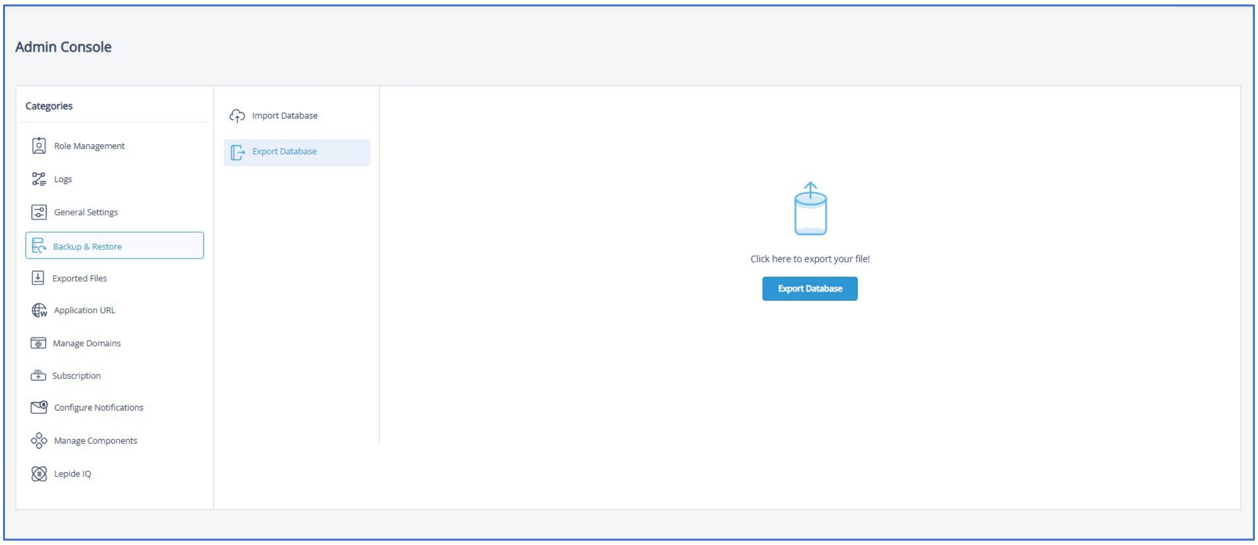


Figure 110: Export Database

- Click the **Export Database** button
- The screen will show **Loading** at the top
- The export may take some time.
- When it is finished you will see the exported file in the **Exported Files** section of the Admin Console
- When it is finished you will see an SQL file in your Downloads folder. This will start with 'lepideReportViewer_Backup' and will be an SQL file type.
  For example: lepideReportViewer_Backup_(19-00-02_21-12-2022)

- This file can then be selected when importing the database

16.5 Application URL

This allows you to change the URL for the Web Console.

- From the Admin Console, select **Application URL**

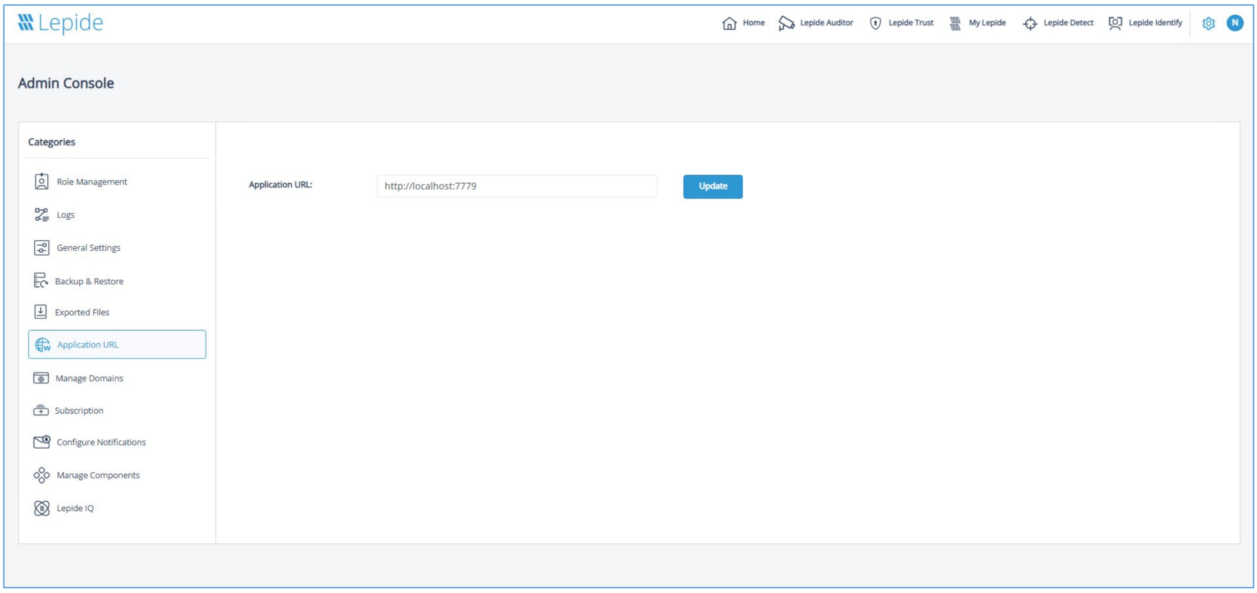


Figure 111: Application URL

- To change the URL, type it into the text box and click **Update**

16.6 Manage Domains

The Manage Domains option is used to add, delete or edit a domain.

- From the Admin Console, select **Manage Domains**

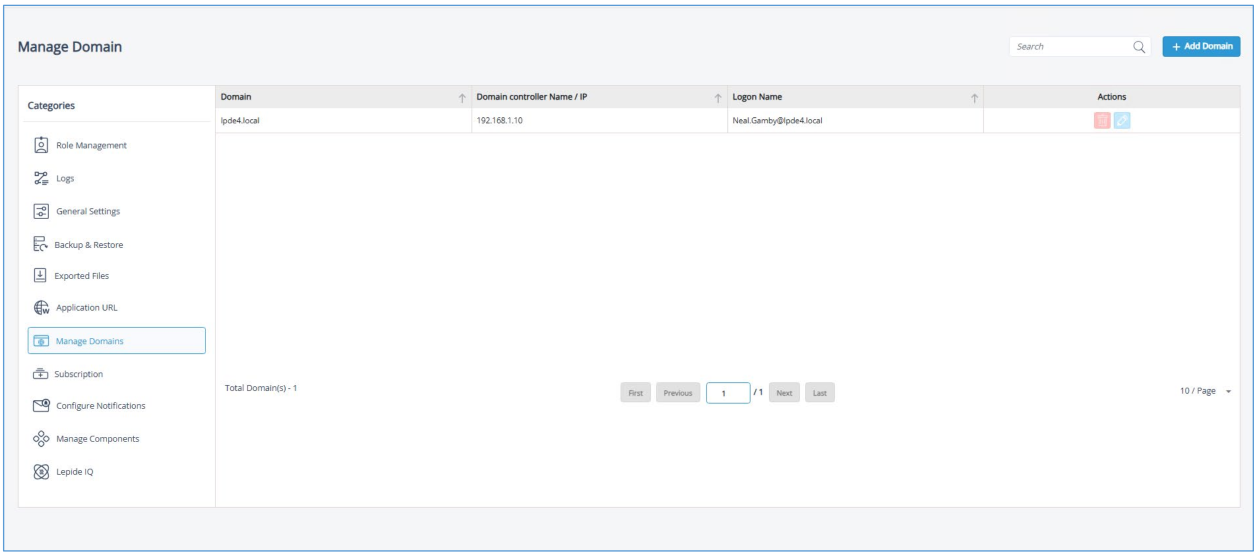


Figure 112: Manage Domains

- To add a domain, click the **Add Domain** button and the Add Domain dialog box will be displayed:

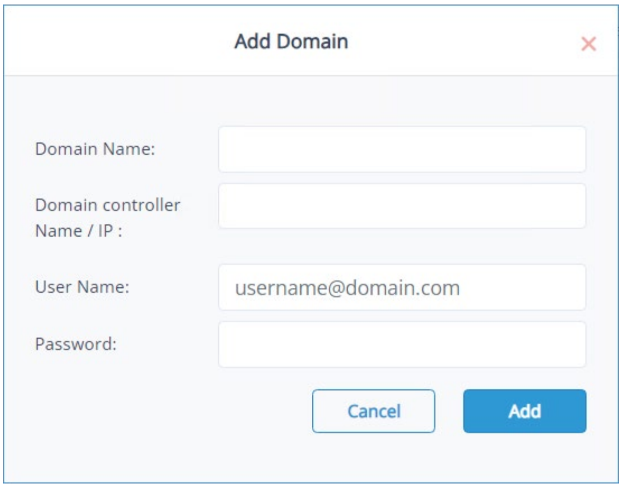


Figure 113: Add Domain

- Type the domain credentials and click **Add**
- To edit an added domain, click the **Edit** icon
- To delete an added domain, click the **Delete** icon

16.7 Subscription

Please refer to Section 10 for details about Subscriptions.

16.8 How to Configure Data Discovery and Classification Notification

Notifications relating to the scanning status of Data Discovery and Classification are configured in the Web Console. The configuration of Data Discovery and Classification itself is done in the Main Console and instructions on how to do this can be found in the Data Discovery and Classification Configuration Guide. Once Data Discovery and Classification has been configured, notifications about the scan status can be enabled in the Web Console and are received by email to the specified email address(es).

To enable and configure notifications:

- From the Admin Console window, select **Configure Notifications** and the Data Discovery and Classification Notification window will be displayed:

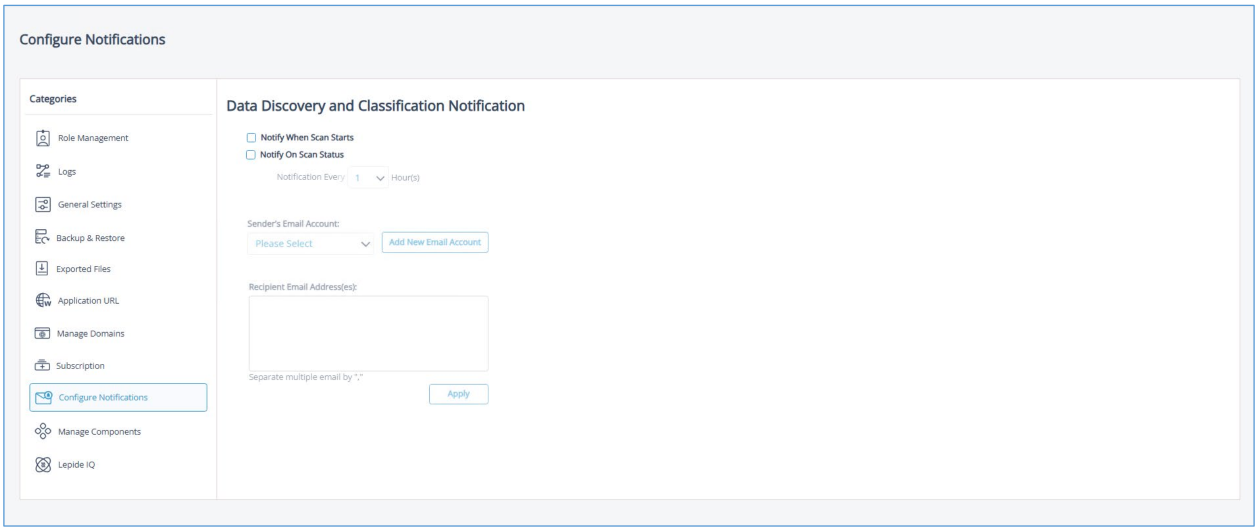


Figure 114: Configure Notifications

- Check one or both of the following options:
  - **Notify When Scan Starts** option - to receive an email when the scan starts
  - **Notify On Scan Status** – to receive regular email updates on the scan status
- Specify the regularity of the emails by choosing the number of hours (between 1 and 24) from the drop-down list in the **Notification Every x Hour(s)** option
- Select the **Sender's Email Account** from the drop-down list. If the email does not appear in the list, click the **Add New Email Account** button to add the email account
- Add the **Recipient Email Address(es)** in the text box, separating multiple emails with a comma (,).
- Click **Apply**

16.9 Manage Components

Please see the individual component Quick Start Guides for details on managing components.

16.10 Lepide IQ

Please see the Lepide IQ User Guide for details on Lepide IQ.

17 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/.

18 Trademarks

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