



Report Builder (Beta) Overview Video Transcript

Welcome. In this video, we're going to cover the Report Builder within CyberCNS. So, the report builder is our custom UI to build a recording out of the data we've collected within CyberCNS. So, let's go ahead and get logged in and we will get started.

So when we first get logged in, we're going to be at the company level. We're going to want to make sure that we switch over to our global view. And then on the Settings menu on the left, we're gonna go to report builder.

Alright, before we get started here, I'm gonna collapse out this menu on the left using the arrows up here. So, if you just tap that, that'll collapse the menu. If you tap three lines, it'll bring it back. Just give us a little more real estate today.

Okay, so when you first get into this screen, we're going to be presented with our report templates. Now, if you've never been in the screening, you'd haven't done any years is going to be blank. Don't worry, we're going to make our first one here together today. And if you do see them there, you'll see those are where you can edit, delete, run and interact with existing report templates that you've already built. So, let's get our first one built today together.

Alright, so we're going to start with our add, we're going to tap to add, and this will take us into the report builder. So, this is the report builder UI and I like to think of this thing in kind of three panel breakout. Okay, so we've got what I'm going to call left panel, center panel, right panel.

On the left panel, we have what we call blocks. Think of it as building blocks, data blocks, the building blocks for our report. This is how we get the data out of our CyberCNS and on to the report editor. Okay, so on the left you can see we've got different block categories broken out so ad audit, Active Directory, assets, the remediation plans within CyberCNS compliance benchmarking against the assets, actual compliance tables, and then vulnerability tables where we detailed in summary analysis of what we've collected from your assets. So, these are all the different data blocks.

And once you're working with data blocks, to get them into the second panel, you just drag and drop them. So, if I wanted to bring over you know, for example, all assets, I just drag, drop it on the editor. And that brings it into that center panel. And I can see what that data looks like. What's included. If it's gotten, you know, a lot of data sometimes you'll left and right scrolling.

And then once you set it, a block on the editor on the right, panel on the right side here is where we're going to see it for that data block. So, on this particular all assets, I'm looking at the options for this block.

So, let's go ahead and do some small edits here. So, the first is the ability to pick what fields we're displaying. So, you can see here we've got a list by default, we check them all. You guys wanted to

remove things out of the list because you don't need all that simply use the checkboxes. So, if I'm looking at this and I say Hey, asset name and Agent name, better look about the same. So, I'm going to go ahead and keep asset name we're just going to remove HMB once we uncheck that, you hit apply, it removes it off the list. And we just repeat that until we get everything off the list we don't want so maybe MAC address I don't care about and maybe first discovered I don't care about but I want to see the last discovery. So, there's my list filter attached more.

You can also reorder your list column headers, so using the three lines if you wanted to change the order of things, you can just simply move these around so maybe I want last discovered next the manufacturer apply it and it will rearrange our list for us.

Okay, so this is how we interact with the fields that are available on the DataBlock. Then we've got sorting options. So, this is the ability to pick a column so any of these column headers are available, so asset name IP OS manufacturer, and then we can sort them on a direction. So, either ascending or descending. So, if I choose my column header, I can pick which one I want to sort on. I'm going to go ahead and sort on our asset name. And then we can choose which direction ascending A to Z low to high, or descending Z to a higher low. I'll just choose ascending for our sort here, and we're going to sort on an asset name. So, I would want the A's at the top of my list. I hit apply. I get my sorting options.

Got some date filtering options here. So, if you want to filter, a specific date range or a time, a range of date, we've got some pre canned choices that you can select from or you can use the Enable custom and then set the number of days that you want to target. Below your date filters. We've got data source for fields and then for the actual filter itself. So, if you wanted to filter out data based on a particular field, this is where you can select again the field you want and then how you want to filter that data. Same thing with field data again, pick the field you want and the format so the formats are, you know, operators statements or booleans. Is it empty? Is it not empty? Does it contain certain text? Does it have a match of text? Is it greater than or less than equal to or not equal to some options here that you can do custom filtering on the fields or via the headers, and then we've got some styling options for color.

So, on this particular you know, block, you may decide that critical high, medium low, you want to bring some color some red, orange, yellow, blue, or any color that you deem fit. So, that can that allow you to do some filtering based on data sources. And so those are filters there.

Now to navigate between blocks once you get multiple blocks on your report, I'm going to show you kind of what that looks like. So, let's bring in printers. I don't think we have any printers at this site. Let's bring in anti virus installed and update about that. So, now we've got three blocks here.

Okay, so we've got assets, printers installed and updated. These filtering options are how we toggle that right panel out so you can see right now I'm looking at installed and updated. So, if I'm in this these are all my fields and I can kind of see what I'm what I'm looking at. If you want to switch up to asset printers, you just tap the filter and say yes, and you'll notice that this is going to switch soon as I say yes. Now I'm looking at printers, there's my printer data, and so on so forth. So, if I want to go back to assets, I say yes, boom, there's my assets. I'm gonna go back down here. And this is how you toggle between your data blocks. And then you got your filtering options. So, I'm going to use the axis here to just clear off our screen and I'm gonna take us from the top, blank slate here. Let's go back to gonna kind of go back from the top here.

I'm in the report builder. I'm going to go and we're going to build a very simple asset report here. So, all assets and how about my asset risk score and let's bring in this operating system on to so you guys can see this panel. So, these panels we can also change how they display so we got bar chart, we got a horizontal bar chart. You've got pie chart, Donut, which is essentially your whole pie chart. You can change the way you're viewing some of the data, again, depending on what data block you choose. And you can see here when you choose the block, we've got a little indicator of what that looks like is it a pie chart? Is it a table page to build to kind of see the different blocks as you're dropping them on.

So, once you've got your report built out, you've got all the blocks, you've got all your filtering done. You really just ready to save that report for print. So, to save, we're just going to tap on our Save icon. It'll ask for a name for this simple asset report. And we'll click Save. That will return us back to the list of report templates where we should see report right at the top. And from our actions menu, we can run that. So, I'll tap run this will start to run the report. We can choose what customer from CyberCNS we want to run it against and choose our seated advisory group. We submit that report will kick off and that report once is done and ready will go will be on the generated reports tab. So, over here, we can see here symbol asset report. There's my company status screen. That wasn't when it was created. This thing's ready to go. And then I can download it either as a PDF or a doc. I'll just use the word doc option. And this is the word document from that report we just made.

Right nice, simple, nice and easy. Got our two panels in there, our data blocks with the column headers. Again if you wanted to filter things out you can filter and then of course, you can customize the look and feel of these reports. Within our report settings, we do have the ability to customize you know the styling the header, footer, the colors, the font, etc. In the so if you're interested in learning about how you can take advantage of that within our system. We do have a report customization set up a video that covers that in a bit more detail. So, if you want to be able to take your reports and punch push them out using your custom templates. We have a video out on the YouTube channel that will cover that in detail. So, that is out there for you guys. We're going to focus this one more on how to build these reports out using the designer. Okay.

So, again, once we've got a report designed, running it real simple, we can clone the report. So, if you build a really nice report and you just want to make a couple tweaks to it, maybe make a couple edits without recreating it from scratch. This is how you can use clone it. And then once it's cloned, you can tap Edit at the Edit takes you right back to that report designer and we can start making the edits that would work. And then lastly, if you want to delete, you just tap Delete and that will delete the reports once you no longer need them.

So, again, we wanted to review an existing report on any of your existing you just go to Edit, it'll take you back to that form. And from here, you can start to drag and drop your cubes. Again, I can start bringing additional tables in maybe I want to bring some AV stuff and I want to bring some device encrypted stuff in. So, again, the more the merrier. You can start dragging and dropping panels in here. And you can mix them so you know if you want to do assets, maybe you also want to do vulnerability. So, let's do vulnerabilities. We've got missing Windows patches. We've got a vulnerability summary. Maybe I want to bring in all this. Right. And again, once I'm done, I can see I actually want to show you the preview so download as this will let us almost preview this thing in real time without saving it. So, if you're going to build a report for your first time before you save it, you can actually just go download, choose your output. I like Word doc, go to your doc and this will show you what that report looks like as of right now.

So, there's my assets my missing patches, the vulnerability summary, device encryption, you detail the info so you kind of see how it's just building out all the rows for us. So, as you're building your reports, in the designer, you can use that download to preview it and kind of fine tune it once you get it where you want it then you can save it. So, that is our report builder in a nutshell.

If there are additional areas of the system that you'd like to see, please comment the video. Let us know. You know, do you want to have us build out a certain report? Let us know we'd like to produce additional content for you guys. If you have any questions issues in the report builder or need some guidance, you can contact our support team always you know email ticket in support@cybercns.com. I would also encourage you guys to check out the documentation. We've got some really good documentation out on our website. So, if you go to the website connectsecure.com, go to go to the resources and support area. Our documentation has the report builder in detail covering everything that I just went through. So, if you'd like to follow a doc that is out there, and then of course, out on the YouTube channel [@ConnectSecureEducation](https://www.youtube.com/channel/UCConnectSecureEducation), we've got some additional resources, like I mentioned that cover how to do some of the white labeling and report customization on the standard reports that we provide which also can interact with your custom built Report Builder one so you know let us know how else we can help. Thank you guys again for watching.