Report Customization Overview Video Transcript

Welcome. In this video, we're going to cover the report customization overview.

So, to get to the report customization, we're going to be working in the global area under settings for customization. And today we're going to cover the four major sections around report customization. So, we've got a screenshot here just to give you a little sneak peek what we're going to do well then get logged in here to our instance CyberCNS.

So, once we get logged in, we want to make sure that we are kept up to the global view. And over on the left panel under Settings, we're going to go to report customization and we're going to cover this main section today. whose main four functions within the report customization.

So, this is the report customization regarding the out of the box reports that CyberCNS provides. So, just to back us up a step. Looking in CyberCNS, if you're over at the customer. view or the global view, and you choose Standard Reports. And you print any of these reports. And these are all the standard reports that we offer. Annual when you print them, you'll notice we've got these different outputs. So, you got PDF, we've got PowerPoints, you've got Word documents, and we've got Excel files.

So, when we refer to the report customization, we're referring to the ability to customize the look and feel of those standard reports, either a global template or a customer level template. So, standard, we're gonna start at standard report references. And so, these are again, all of our out of the box reports broken up. So, we've got our compliance report section here. Our assessment reports, aviation plane reports, so on and so on. So, each section as all of our standard reports, we're going to work with our asset report today. This is very heavily used. So, I'm just going to use this in our examples today while we work together. But everything we talked about could be applied against any of these reports.

The first thing I want to point out is all of the gray dots that you see on the screen. Those gray dots are indicating that the default templates are in place, meaning however, CyberCNS was configured. These templates aren't set up right now the out of the box designs. If you make any updates to a template within CyberCNS, that gray box will turn green and indicate that we have a custom reference or a template in place. So, if you're ever trying to understand what your reports you touched and customized, you'll know pretty quickly at a glance when you see those green dots indicating so that's kind of the thing.

You'll also notice that we've got two columns here for Docx and PPTx so this is for any report output to a Word document. This is for output reports to a PowerPoint. Some of the reports do not support PowerPoint. So, if we do not support a PowerPoint, there just won't be a dot a dot there. So, you'll notice a bunch of the vulnerability reports we do have PowerPoints available except for the log for Shell one. So, that's the difference on the UI that we're seeing.

Okay, and then the last is the actions which is where we actually can get in and do some edits to the reports. Templates. So, we've got three options here. First, is we can download the default template. So, this is so you can download the template and understanding what this looks like out of the box and use that as a starting point to do your customizations. We can then upload a template once you've made the edits that you want to the report, you're able to upload that template back to the system. So, when cyber CMS calls up then report it will use the custom template that you have in place. And lastly, we've got this really nice reset feature to reset back to the original template that Cybersyn has provided. So, if you guys get in here and you're getting crafty and you're making report customizations and you make a mistake or you blow something up, you can always come back reset it to the default state and rebuild region but that's what that resets for.

So, what we'll do today is make the customization too. So, before we make the customization, I'd like to run the asset report template, so you can kind of get an understanding of what it looks like for an app. So, first thing I'm gonna do is we're going to go over to the customer view, I'm going to go to the standard reports, and we're going to run our asset report. I'm just going to go down to assets. I'm just going to run this one here and you'll see we've got two outputs. That word, I've got an Excel so I'm just going to tap on that word to start that download. And this is our asset report template. So, you can see here, we've got the company's logo. We've got the name of the report, who it was prepared for when the scan was initiated. Nice City View background here. Discovery settings now there were there are no discovery settings, so that's why it's blank. And then we've got the asset report. So, the actual assets that are part of this so again, we can see the table, building the data.

Alright, so the report template editing is giving us the ability to take this report and render it different next time. So, maybe you want to change the font, or the size or the position of this. Maybe you don't like the city state. Maybe you want to change this out so it's a picture of your office or some other background. That matches your what your clients industry. So, if you're working with healthcare customer, maybe this is a healthcare image or if you're dealing with a manufacturing customer, this could be some kind of manufacturing background. Sky's the limit, right.

So, let's show you guys how to make those edits. So, what we're gonna do, we're gonna go back to where we originally started today, Global Report customization. We're going to be under our standard references, and we're going to go back to that asset report. Scroll down, we're going to deal with this asset report. We're going to go ahead and use our download default template. So, this is going to give us the Word doc template that that report uses Okay, so this is the actual template that is being called when that report runs. So, you can see we've got some variable tags that are replaced with the information like the logo for the customer if it's there. Otherwise, display your default logo. So, if you don't have a customer logo, then we're going to display your logo. And we've got the name of the report called asset report. We've got prepared by and then again, we've got company's company name inserted with the scan con. So, these are the variables that we're using. We do have a dictionary with all these variables built on them.

And then to do some editing on this, again, what we could do is I'm going to first I'm going to do enable editing and word if you need we'll edit this thing. And so now this is a Word document. So, if you're familiar with word editing, this is as simple as making edits in Word. So, for example, this is an image background. I'm going to go ahead and replace that image show you couldn't use your change your change picture, you can either double tap this to get to your formatting options and do your picture at it.

I've got a quick access here. So, I'm just going to do change picture. So, we can upload our own. We can pull stock images, online pictures, so I'll just go some stock images here. And let's say How about we like this fancy skyscraper. So, tap that, insert that image and then I would most likely also maybe scale this thing a little bit on filling up my space and I've got an appropriate fill there. So, that would be an image update. Right and then no different with this box. Again, I've got the ability to move this box around my screen rewrap it rescreen change the shape of it. However you want that to render. And then again, if you wanted to change any of the text within that that box frame you've got the ability to go ahead and edit your text in there. So, that brings us back to our normal state. And we'll call this asset reporting. Adding add that arm also be or a couple little edits. And then again below settings as far as font styles, maybe you want this font to be empty pro black, and you want it to be bigger. You know, you can customize anything and everything we see there, including what that watermark says. So, once you're done going through making your edits to the reference doc, we're going to say that so I'm going to go save as we're going to call this asset report updates. And that's in my Downloads folder. So, I just saved that document to our downloads folder. I'll close it out because I don't need it anymore.

So, I'm back inside CyberCNS and this is where I'm then going to upload the template. So, that that template you just made just gonna go upload, it's going to know what are we uploading or uploading backpacks template, choose the file, go ahead and browse to it. So, go ahead and back to my Downloads folder. There's the asset report updates that we just made. There's a little preview and I can see my skyscraper image so I know I'm on the right one. I'll go ahead so once the templates been added, you'll now notice that gray is now green. And we've got the down arrow the down arrow is what allows you to download that Doc template. So, if you wanted to make another round of edits to it, you can make the edits and then you can re upload your next revision. And also, that green dots the indicator for you to know quickly which templates you've customized. So, now that we've got that asset report customized, we're going to go ahead and run that report. We'll jump back to our company back to standard reports. drive back down to our asset report here. And then I want to also point out another visual indicators. So, if you're on this report screen, and you're about to run a report and you see one of those boxes outlined in that yellow, that is your indicator that that is a custom template. If you hover over it, it will also tell you custom type. So, anytime you're working within the reports up and you see a yellow frame, you know, hey, this was a custom template that we edited within the report Customization menu. So, again, just a quick visual. I'll go ahead and tap on that. Word. That'll start the download. And that download is telling you here that it's been queued in to check the report jobs. So, that report ends up downloading to our jobs area, right here at the top with the timestamp and I'm just going to go ahead and download that report. And this will be our updated report using our revised document. So, it's got the updated logo, it's got my updated wording on it. It's got my updated font styles on it. So, any edits that we would have made to the theme settings that includes this you know, voter banner, anything on that document would have been done rendered here.

So, that is how you can use the report customization. customize any of our built in reports. Simply download the talk, make your edits reuploaded or very simple. You get into jam and you mess up, reset the doc template back to the default on the box state and give it another go. That is the standard report references next we're going to move on to our manage logo.

So, this is where we can manage logos for all of our customers that are in within CyberCNS. So, right now I've got 16 different customers in CyberCNS and you can see here are the ones that actually have logos uploaded, we'll have the green dot that tells me that I run a report for those customers will get their logo. If I run a report for anybody else, it will display our logo for your company's logo that you have branded.

Okay, so this is a way to customize at the customer level what the logo looks like when you print a report for that customer. And you can always view the logo, upload or renew the logo if you need to remove them once they're added using the action button. If you wanted to take you know hey what is the blue web company's logo look like it hit View company will go. This will give you a quick preview of what that looks like if you wanted to remove it you just tap remove otherwise click away. So, this is manage logos very straightforward. This is how you put logos in for your customers. So, when you want to reports for them, their logo is displayed on the report cover page. Instead of your company's logo by default.

Next, we've got the report builder reference documents. So, very similar to the standard report these reference documents are styling documents almost, if you will styling documents that tell the system how to render reports for these customers. So, if you don't have it set, it just uses the default report styling. If you want to customize the look and feel then you can go to a customer so I'll just use our bullet company customer today. And we can again start with the same process. We're going to download a reference document to see what it looks like, make our edits, we upload it. So, this is the default report reference doc or reports that are built, so whenever report comes out of CyberCNS, we're looking at our customer blue LED company. This. This is the styling that the reports will use on the box. So, it'll use this theme color. It'll use this positioning it'll use these heading styles, these text styles, the text fonts, and the table style and color.

So, if you wanted to change these out the brand add more to your customer's color schema or their font styles, or branded to your own company's styling and branding guides, which some marketing departments will provide for you. You can go ahead and make these edits. So, on this one for example, I'll make some edits to this reference so what I'm going to do is in my search here, I'm just going to do a theme. We're going to go theme colors. We're going to swap this blue out, and we'll say that this customer likes red, red and orange. So, I'm going to go with a red orange statements that so when we print their reports, we get the red kind of ironic since the name this blue web company. They like the red text on their table. If you wanted again to change the way the table design is you can edit the table design, it changed the way the font is going to display, what size it is. Again, maybe you want to do Arial Black, maybe all this text here. You guys want to use your normal meetings patterns on our web. So, maybe you want to change your, your font styling upon and again, maybe you want to add footers or remove the page numbers or change this header out or change the footer out. Sky's the limit right using customizes doc the way you want. Once you're done, you're gonna give it a save. You're going to save this so I'm going to go save as I'll call this our blue web reference doc. A blue web company can find it later, close it out. And then again, on the report builder reference documents. We're going to go to our customer who had we just did the download step. Now we're going to do the upload. So, we're going to upload and choose the file. We're going to choose that blue web button open that up, upload that file. Once that file is in place, the green doc will light up letting us know that we are enabled at a custom template. And again, as I print reports for blue web company now, it will use our styling guide. Based on the report builder document we just provide it so we'll get the red text inside of the blue. That will work for any of the reports that we're printing on standard reports. Okay, so again, want to remove that styling guide, you just hit delete. That will return us back to original state. Anything grayed out, we'll just use the default styling guides. So, don't have to have these set. But if you want to provide more of a white book, touch to a strategic partner that you've got a big customer of VIP customer, whatever it happens to be. You can create some customization for them when you're doing reporting. So, it's a nice touch.

Lastly, we're gonna go to general customization. So, this is where we can display I'm sorry, this is where we're going to customize the display for Excel outputs from the system. So, any again, any of the standard reports that I print that come out to an Excel file, and we'll just do this together, we'll go to the standard reports and see if we can use our assets. Again, that's one we've been using today we'll use our asset reports. And here I just print this Excel one I'm just going to tap the Excel icon. That will start the download will open this up Okay, so here's the cover page asset report prepared for and then on each tab, you can see we've got some information so assets you need counts, vulnerability breakdowns, severity reports, application reports, so on and so forth. You'll notice the styling on the XML files got this kind of green header it's got blue text.

So, our customization allows us to change how this is displayed on these outputs. So, if I was to up in here, and we're gonna go back to our globe, and go back to our report customization and back to General and we're gonna go ahead and add a new record here. So, when we add this this is how we customize the our colors. So, this can be set at the global level. So, if I check this box, this is a global setting for all customers. If I want to do it for a particular customer, I can choose out a list for my customers. So, if I wanted to say hey, we'll just go ahead and say blue web company, then this applies to blue at the watermark. This is where I can insert what I want that watermark to say. So, this might say confidential, or this could say for blue web clients only. You could write anything you want there. I'll just leave that in the way it is. You want to add filename extension here you can add on non filename extensions. And then below is where we can do either the doc or the Excel customization color. So, I was going to do Excel coloring today. Here's my header text colored blue let's just switch this to have Outbrain we'll go header size 14 I'll go back down to our standard 12. We've got the header cell color. So, the cell color I like to be a little more towards a light so I'm going to go with kind of this silver ocean gray Excel data color. I'm gonna go with black. I think Black data always makes it look nice. And then data cell color again, I'll go with something a little lighter, which is kind of another light gray. And I'll go to my standard 12 point font. We want the header text to be bold. Sure. Do you want the data text to be bold? No. Generate even if the report has empty data I don't fit if it's empty, I don't want it to not render.

So, once I add that styling customization and next time I go run an Excel export for blue web company, we should get our styling based on this custom mapping. So, again, I'll go back to our Android reports from and make sure we're on blue web company and then we'll go ahead and run our asset report here. In mobile mode that'll be added up if it doesn't download to your downloads right away, adds it up into the report jobs. So, it should be right at the top of the timestamp or that should be our Excel. So, again, asset report, logo from that customer comes through. And then there is our new styling on the Excel push out. So, I've got my updated font, I updated 12 point I've got my green text and my light gray header rows just like I wanted them. So, again, try to bring in these if they're gonna if you're going to interact with your customers with any of their staff or their it if you're working in a hybrid type of support model. It's you know, it's great to give them a custom type show things are branded towards them. So, this gives you the ability to bring those Excel outputs with the customers farm style and coloring that they would prefer. Again, that's under our general customization. And as you can see here as you add a mapping in it gives you a quick heads up view of what the styling is. And then from here, you can either go in and edit that or remove it if you want to take it back to the default state. And that is our general customization.

So, that will cover our report customization options. If you guys have you know, any further questions or want to see additional content on video around these, you know, comment the video let us know, happy to rerecord a second part to go over anything in detail. We've also got our documentation out there. So, want to make sure that I pull that up here if we go to connectsecure.com, go to our resources and our support page. We've got our documentation link out here. And in here, we've got some really good documentation around the reporting. So, if you want to learn more about it we've got our full report guide, which is super thorough all of the steps and details are out here. If you want to look at how to install a template, if you want to look at working with the builder reference documents that we just covered and you know adding these reference documents here. You know, if you want to learn more about the templates, or uploading and updating logos in bulk. And then also, the general customization. So, these are all detailed documentation pieces, or you can come in and get some more data from this if you're looking for extra details around these report customizations. And then also, if you want to download the doc. This whole guide is downloadable in a PDF form.

Alright, thank you guys for joining us today on the report customization overview. We look forward to our next video. Have a great day.