



## Standard Reports Overview Video Transcript

Welcome. In this video we're going to cover the Standard Reports section of CyberCNS.

So, let me go ahead and get us logged in here to start get into our environment.

So, standard reports are going to be available at both the global and the company level. So, remember when you're inside your CNS, you'll have the ability to go to either your company level which I'm on now or to global level. And once you choose the option you want, you'll have the standard reports over on your left hand side under the Scan Results window. So, standard reports here. There's our standard global level reports. And then if you're looking for more options, we've got a bunch more reports on the company level side.

So, again, choose company level, from the drop down up at the top, you'll just go ahead and choose the customer you want to work with. So, you just tap on the company up there that you want. We'll just use our blue web company today. And then on the left, standard reports, again, you tap here and you'll be presented with a report list.

So, these are all of our out of the box reports that we provide an update. These all can be customized. So, any of the reports that we provide a standard reports can be customized. You'll notice up in the top right we've got a custom template used this is a legend to show you that if you see a gold box around the report, that means we've got a customization in place. So, if you look on the screen, we've got the assessment report, we've got the gold box around the PowerPoint template, so that means that I have customized the standard PowerPoint template, which I've done some white labeling. Again, if you scroll through you can see the asset report again I've got a bold box around it that to indicate to you guys that you have done report customization against one of our standard reports.

Now I'm not going to cover report customization in this video. If you guys want to learn about that I have a dedicated video on the channel. It's labeled report customization. And it will take you through what you need to do to actually customize the standard reports. So, if you're looking for that, that content, we have our own separate video for that to check.

Okay, so starting here, company level standard reports. What I would encourage all of our partners to do is take the time and print every one of the reports out. Take a look at them, learn what's on them understand what's on them. And from there you should be able to identify the reports that add value to your clients to your organization's the way you guys report the way you're managing the services you're providing. There's no telling which you know what reports are going to work for each each partner is a bit unique. So, I would encourage you guys to print all the reports out and then identify the ones that you would like to use in your organization. And once you have those identified we can do things like use the report scheduler, for example, where we could go in schedule reports to automatically be ran and

sent to us so we don't have to come in manually. You could use the report scheduler at the company level once you understand what reports you do like reuse.

And so I'm going to just take you through some of the basics here on the standard reports. So, looking at the top header in the screen, we've got a search any filter option, which you'll notice right away at the top. So, to use our searches, we've got three built searches, a lot of partners come in here and try to search things in here and they try to start typing stuff and like is not working. So, the search is actually meant to filter things for you. So, if you tap it in the search box, we've got three different filter keys available. These are hard coded. You can choose by tag by operating system or by discovered protocol. So, for example, SMB scanning or probing or lightweight agents.

So, what you're going to do is tap on the filter key. So, I'll start with for example operating system right so the tap operating system will then present the operators you can do equals not equals contains or does not contain. Once you tap on one of those choices, we will show you the operating systems that are able to be filtered on based on what we've discovered in your assets. So, if you wanted to say hey, maybe I just want to run a report for all windows 11 home jeans, I can tap that. So, when I run any one of the corresponding reports below, we will filter data based on that operating system. Now you can combine multiples in here so if you wanted to do OS, maybe you want to do 10 grow in Windows 11 You can add multiple filters in and again those filters are applied when we render the reports below okay.

So, again you can filter by OS also got the ability to do by tags. So, if I tap on tags again we will have a similar tagging ability. So, we will pull tags from the tags in your system. And you'll build to go ahead and maybe you want to include just production machines in this report. You don't want to pull anything else that's not labeled production. You can also do things like you know, maybe in my list, we give you a little in there. Maybe VIP is another tag so maybe I want to report on just the VIP assets in the in the environment. Right. We know we've got, you know, some couple 100 assets out there for a customer. But what about the VIPs? Maybe I just want to report those, but this is a way to use tags to sort report and filter out some of that data from your environments. X can be filtered. And then last discovered protocols as I've mentioned, this is how we actually discover those assets in the environment. The probes various scanning protocols like NMAP and VT SMB scanning SNMP or directly from lightweight agents that are installed. So, you got the ability to do some filtering here. And then your run your reports will filter out based on those parameters.

You can easily remove filters by just tapping on the axes in the corner. So, if you want to remove filter, you just tap the X. You can also use the clear filters to remove all the filters and restart so if you want to get rid of a mom just have to clear and then below again we've got all of our standard reports broken out by category so ad audit has a report. Active Directory reports have a list agents assessments so on and so forth. So, each of the reports are broken up into categories.

And then as you're seeing on the outputs of the reports, you can download them into various file types. So, we support PDF, PowerPoint, Word, and Excel. Some of the reports will have different output options depending on what the report's data shows.

So, you can see like the Active Directory groups, detailed reports only available in Word and Excel or some of those will be available on performance. To get these reports, as you might imagine, you simply

just have to download, I'm sorry, tap on the icon to download. So I wanted to run the assessment report or the lead company again, I can draw PDF, just give that attack. Maybe I want to run the executive summary in Word from starting PDF I can tap full detailed and word tap security summary word tap on you got to do is tap those icons. You can tap multiples at the same time so you can see it all kind of just start rendering them.

And any of the reports that you guys are downloading are going to populate up here on the standard report jobs here. This is where any report that we download will render itself. And once they're sitting here, the ability to use the three-dot action menu to actually get the details or download that route. So, readout menu, we'll go download. I'll do the same thing here download. So, I'm just basically going and downloading those reports. You can see they're going on to my downloads bar down there. He's also going to show up in your Windows Explorer over on your Downloads section wherever that happens to be. And what you can do is go to your downloads folder or you can tap them on the bar to view them.

So, here's an example of the executive summary report for this customer and again, some of the data we're outputting so high-level details about what's in the environment. What we've pulled from Active Directory. Company grading operating breakdowns. You know, vendors a lot of times customers don't realize how many vendors they've got. This is a great way to show a customer Hey, you know, these are all the vendors that we're supporting or interacting with in your environment. Right. So, again, you can pull all these different reports out using the standard reports and if you want to customize these reports further, so again, customization would include things like the image you see here, the textile logos, everything you see on these reports is fully customizable. In the report customization. Again, I got a separate video out there for that you guys are interested in. Standard Reports, as I mentioned earlier can also be scheduled so if you have you know a report like for example, this executive summary report, maybe you want to get this emailed out to your client on the first of each month. You can go ahead and go to the scheduler. You can say this is our monthly summary. Pick what report you want. So, again, the full list of reports is in here. And what we're gonna do is check off the boxes. You can search. So, if I want to search for maybe my executive stuff, there's my executive summary. I'll just tap that box that'll add that report in. How do we want that report sent to our client? So if you want to do PDF you want to enter a password. This will encrypt the email and send it to the customer. They will need that password to open the report on their end. If you don't need to send an encrypted email that you delete the password field blank and you can send this out without and then how often do we want to schedule this report these month, every day, last day of every month so you can choose how you want to deliver this maybe it's the last day of each month and maybe a day. Or maybe since this is first day of the month. You could obviously change your schedule however you want we can accommodate any schedule.

Last but not least, is where do we want the report to go to so we can tap on the names at the plus sign in already Ryan an executor. You can just type you add you can add as many recipients in that list as you want. Option optionally at the bottom you have the ability to again to filter those reports on those same filter keys, tags, operating systems or protocols. So, when this report renders, if you want to only send the customer, maybe their VIP assets in this report and you don't care about all the other stuff that will give you the ability to filter. And then if you need to edit this list, it's as simple as happened those trashcan icons to remove the recipients. As I mentioned, you can add as many as you need to in there and once you're done you just tap on save and that's it scheduled reports.

So, that is our standard reports section. We've also got full documentation out on our Confluence site that covers the support document or I'm sorry, the standard support documentation in detail. So, if anybody likes to read the docs or wants to learn more about some of these reports and see them we've got screenshots and they've got all the detail behind each one of these reports out on our support site. So, if you need to find that again, for those of you that may not be familiar, and [executer.com](http://executer.com) look to our resources app on support documentation right here. And in this list, we've got our standard report. So, you can either navigate to it by scrolling and the list on the left, you go into standard reports. You can also search for it here if you'd like to search so tapping on standard reports will take you through to the full doc and as I mentioned this thing covers everything in detail. Others all the reports all of the parameters, all the different output options here.

So, that's um, you guys have any questions or having issues with this? As always, let us know we've got our support team standing by ready to help. Let us know what you're seeing. And we look forward to working with you guys in the future. Let us know if there's any other content on the report set you can publish here. You can email [education@connectsecure.com](mailto:education@connectsecure.com) and we happy to release a second version of this. So, thanks again for watching.