



## **IT-Security - Report Jobs (CSV)**

Run directory reports scheduled

<b>TITLE</b>	IT-Security - Report Jobs (CSV)
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## 1. About this document

This document describes how to comfortably create, schedule, and distribute many directory reports using a CSV Import. We recommend that you use this document to learn this method of report creation using a non-productive example.

### 1.1 Example of use

In a company, persons responsible for critical directory structures are appointed who regularly check whether the group of persons with specific permissions is correct and whether all authorizations are in order. (Shareowner) The data required for an audit must be provided by the IT department.

DocuSnap can automatically and regularly collect all the necessary data and send reports in several formats at a defined point in time.

Initially, a time-controlled job must be scheduled in DocuSnap for each report. Often a very large number of reports must now be scheduled. The time required for this can be significantly reduced by using the Report Jobs (csv) function.

### 1.2 Requirements

This HowTo is mainly limited to the Report Jobs (csv) function. It is assumed that the functionality of DocuSnap IT Security and the directory report (resource) is basically already known.

### 1.3 Structure of the CSV file for automatic report generation

FQDN of the domain, host name, starting point of the report (share or directory) as well as the recipients for automatic mail dispatch needs to be created in a CSV type file. The Mail column is optional - all other columns must contain valid entries:

Domain; Host; Share\Path; Mail

Domain	Host	Share/Path	Mail
docusnapsports.com	DOSPFS01	C\$	<a href="mailto:support@docusnap.com">support@docusnap.com</a>
docusnapsports.com	DOSPFS01	Management_Global	<a href="mailto:support@docusnap.com">support@docusnap.com</a>
docusnapsports.com	DOSPFS01	Management_Global\08-Projects	<a href="mailto:support@docusnap.com">support@docusnap.com</a>

Figure 1 - Create CSV file: Excel output

The Excel output as structured text file (CSV):

```
Domain;Host;Share/Path;Mail
docusnapsports.com;DOSPFS01;C$;support@docusnap.com
docusnapsports.com;DOSPFS01;Management_Global;support@docusnap.com
docusnapsports.com;DOSPFS01;Management_Global\08-Projects;support@docusnap.com
```

Figure 2 - Create CSV file: structured text file

**Note:** The creation via Excel is only one of many possibilities to create a valid CSV file. DocuSnap supports ANSI and UTF-8 encoding.

## 2. Create directory reports automatically

The following steps describe the report jobs (csv) wizard. It can be opened under All jobs - All assistants - Report jobs (csv).

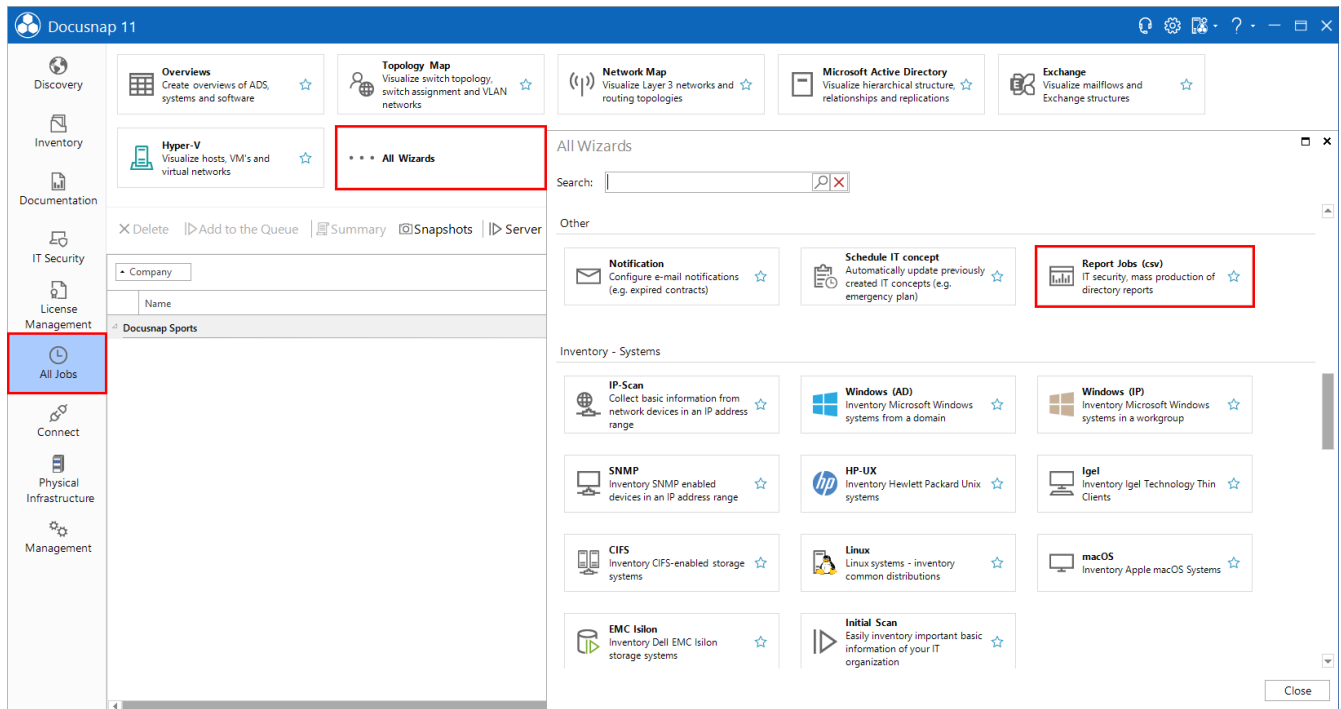


Figure 3 - Report jobs (csv)

### 2.1 Step 1 - Company selection

In addition to company selection and language, the alternative documentation path option can be used to specify where in the file system the created documents are stored. If nothing is specified here, all documents are stored in the Docusnap documentation path. The dialog is described in detail in the user manual.

## 2.2 Step 2 - CSV Import Wizard

The previously created CSV file is now imported into DocuSnap. If, as in this example, there is a heading, the option **First line as heading** must be activated.

- The example shown here shows all supported variants of the column Share\Path:
- Hidden shares (C\$) are supported
- Shares (Management\_Global) are supported
- A directory (Management\_Global\08-Projects) below a share can also be selected as the starting point for the directory report

**Report Scheduling** □ ×

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1  
Company Selection

2  
CSV Import

3  
Directory Permissions

4  
Report

5  
Scheduling

**CSV Import**

File:  ? ...

**First Row as Header**

<input checked="" type="checkbox"/>	Domain	Host	Share\Path	Mail	
☰					
<input checked="" type="checkbox"/>	docusnapsports.com	DOSPFS01	C\$	support@docuSnap.c...	
<input checked="" type="checkbox"/>	docusnapsports.com	DOSPFS01	Management_Global	support@docuSnap.c...	
<input checked="" type="checkbox"/>	docusnapsports.com	DOSPFS01	Management_Global\08-Projects	support@docuSnap.c...	

⚠ The specified CSV file contains shares that do not exist in the database. Line with invalid shares...

Figure 4 - Import the CSV file in the wizard

**Note:** There are several plausibility checks. At the time of CSV import, the shares and shares listed in the CSV file must be accessible. If entries are invalid, these lines will be grayed out and not considered for further processing.

## 2.3 Step 3 - Configure Directory Report

The Directory Permissions step defines the content, scope and appearance of the directory reports to be created. These settings are valid for all directory reports created with this wizard. If a different setting is to be selected for specific directory reports, these must be scheduled separately.

For more information on this extensive topic, please refer to the corresponding HowTo in our Knowledge Base: IT Security.

## 2.4 Step 4 - Report

In the next step the following information must be entered:

- Optional report elements like cover sheet, header and footer can be deselected here
- In the advanced options the required output formats are specified
- Paper size defines the paper size, A4 is the default

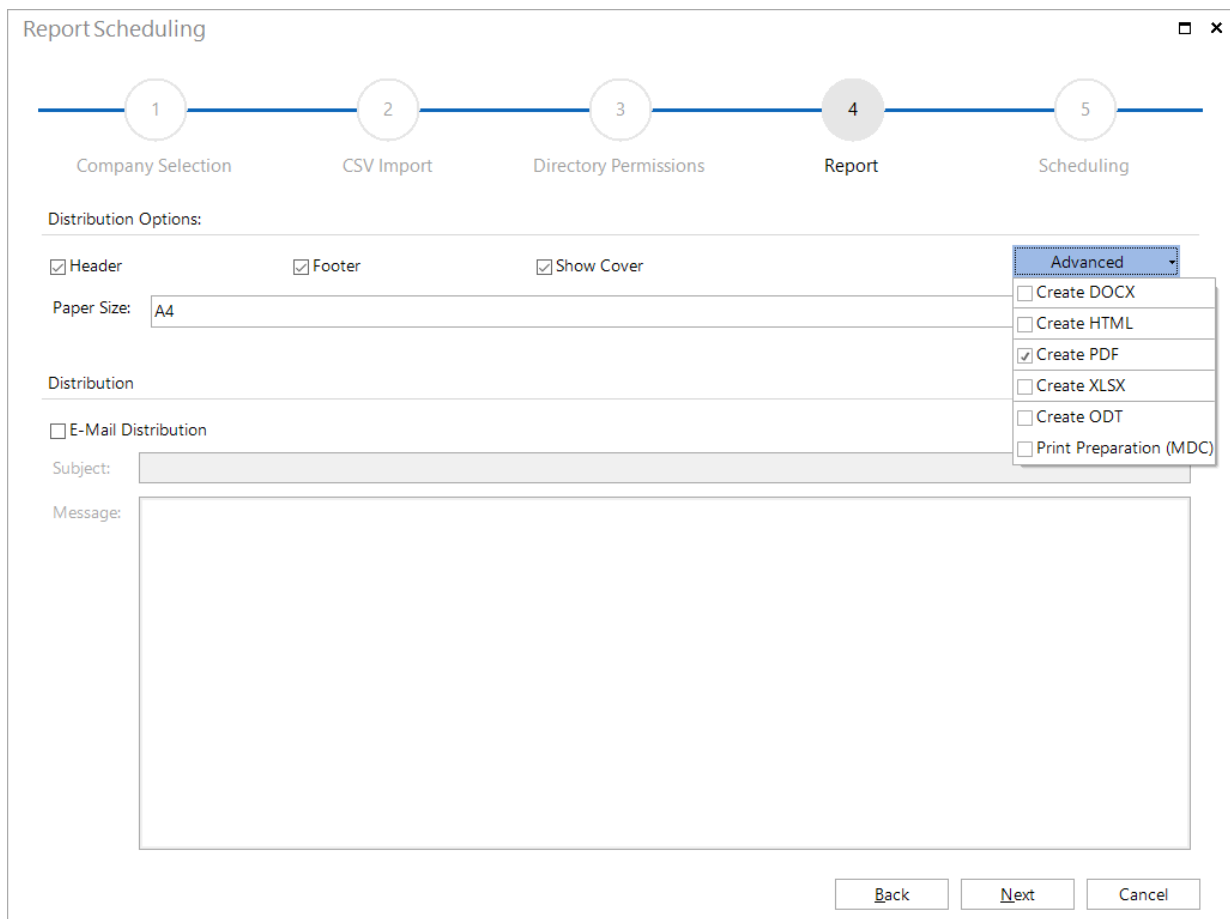


Figure 5 - Configure report output

If e-mail distribution is selected, the generated reports will be sent by e-mail in the format selected under Advanced Options. By default, a recipient field is displayed in this dialog. This field is omitted because the e-mail address of the recipient is already known from the CSV import. The subject and the message are identical for all reports created with this dialog.

## 2.5 Step 5 - Scheduling

The last step is to configure the scheduled execution.

**Note:** The Name input field has a special function here because the name is not only valid for one report. For this reason, Name is used to define the prefix that is placed in front of each report job. We extend this prefix by the respective UNC path from the CSV file and thus ensure the uniqueness of the job names.

### Report Scheduling

1 Company Selection 2 CSV Import 3 Directory Permissions 4 Report 5 Scheduling

Schedule Documentation

Name:  At every 1 of the month at 08:00:00. Schedule will be used from 28.04.2020.

Schedule Type:

Frequency

Interval:

Every  of the month

Every   of the month

Starting Time

Start Date:  Execution Time:

Figure 6 - Schedule a scheduled job



## VERSION HISTORY

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<b>Date</b>	<b>Description</b>
October 4, 2019	Version 1.0 - Description of the "Amazon Web Services" inventory module
April 23, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11

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