



# Objective

## Objective 3Sixty

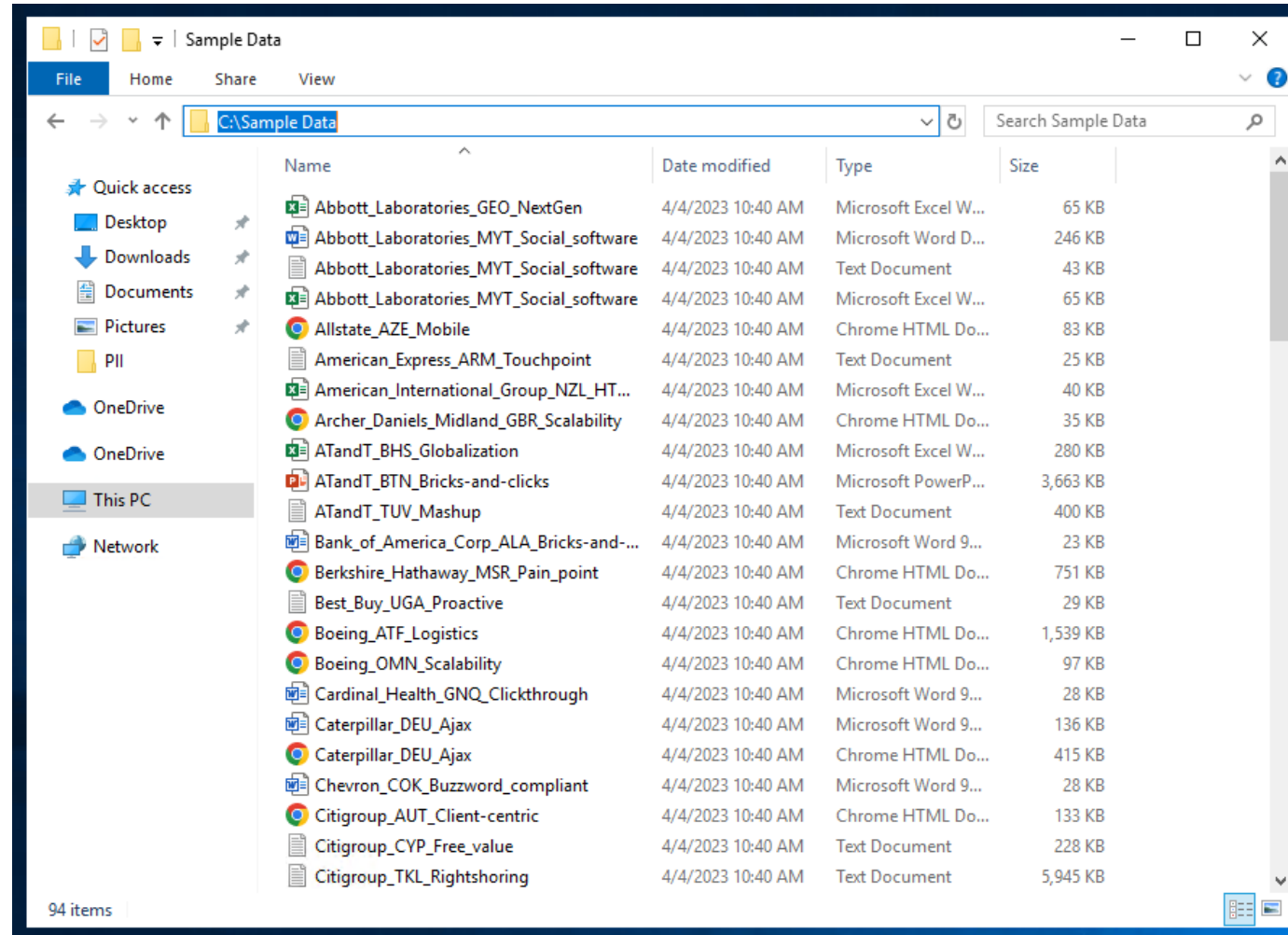
### Discovery Reports Tutorial

This tutorial will walk users using Objective 3Sixty's Discovery Reporting feature which helps users visualize their data.

[OBJECTIVE.COM](https://www.objective.com)

# 3Sixty Discovery Report Tutorial

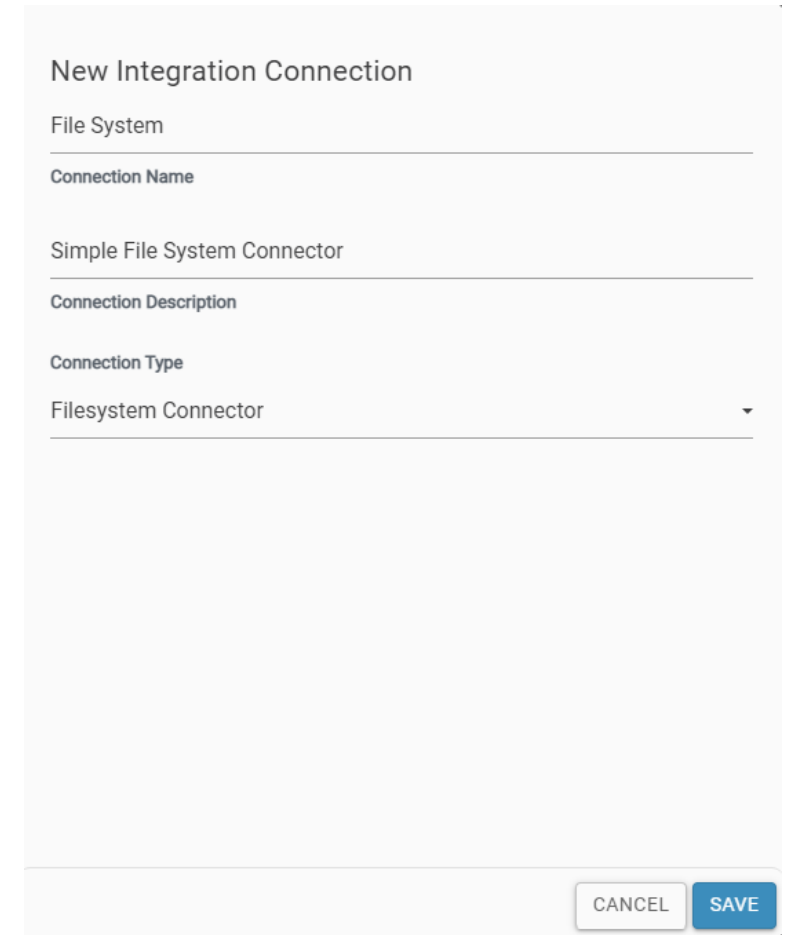
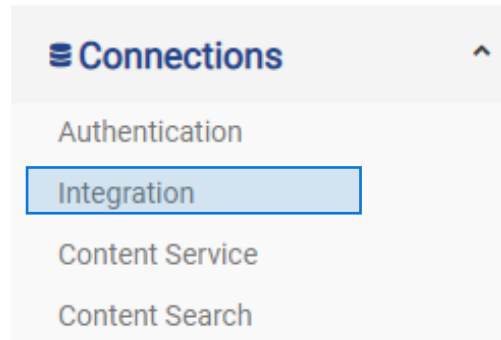
In this tutorial we will be using the Filesystem Connector to discover the number of files with PII content. Make note of the File Path `C:\Sample Data` as it will be used later in the tutorial.



# Create Integration Connection

## Steps

1. Under Connections select Integration
2. Select the Plus button
3. This will open the New Connection Form

A screenshot of a 'New Integration Connection' form. The form has a title 'New Integration Connection' and several input fields: 'File System' (with a dropdown arrow), 'Connection Name', 'Simple File System Connector' (with a dropdown arrow), 'Connection Description', 'Connection Type' (with a dropdown arrow), and 'Filesystem Connector' (with a dropdown arrow). At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE'.

# Edit Connection

## Steps

1. Click Save

### EDIT CONNECTION: FILE SYSTEM CONNECTION

SAVE

CANCEL

CONNECTION

**Connection Name:**

File System Connection

**Description:**

Simple File System Connection

**Connector Type:**

filesystemConnector

**Connector Class:**

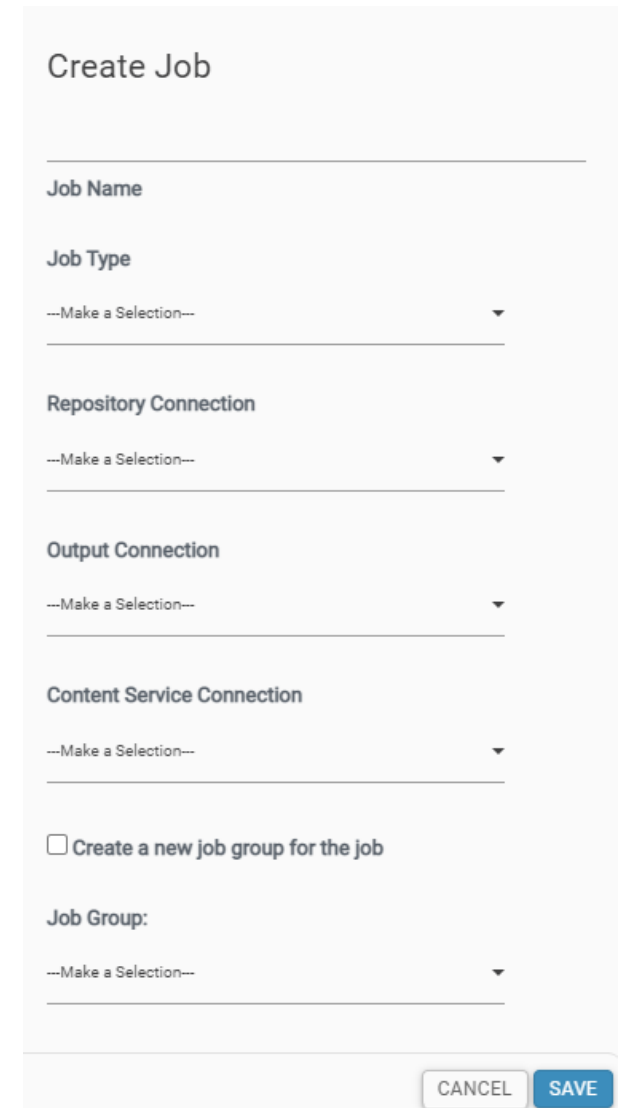
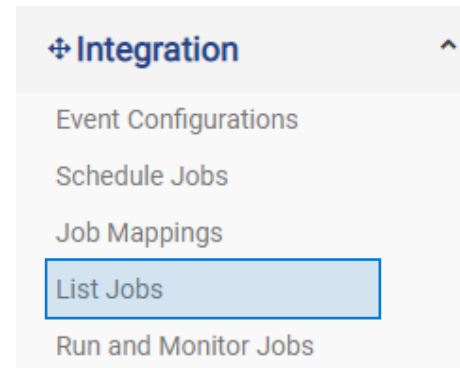
com.simflofy.connectors.filesystem.FilesystemConnector

No Authentication Connections Available

# Create A New Job

## Steps

1. Under Integration select List Jobs
2. Select the Plus button
3. This will open the Create Job form



A screenshot of a "Create Job" form. The form contains several fields, each with a dropdown menu:

- Job Name**: A text input field.
- Job Type**: A dropdown menu with the text "--Make a Selection--".
- Repository Connection**: A dropdown menu with the text "--Make a Selection--".
- Output Connection**: A dropdown menu with the text "--Make a Selection--".
- Content Service Connection**: A dropdown menu with the text "--Make a Selection--".
- Create a new job group for the job**: A checkbox.
- Job Group:**: A dropdown menu with the text "--Make a Selection--".

At the bottom right of the form, there are two buttons: "CANCEL" and "SAVE".

# Complete Create Job Form

## Steps

1. Give it a name
2. Choose simple migration as the job type
3. Select File System Connection as the Repository
4. Select Reporting Connection for the Output
5. Click Save

Create Job

File System to Reporting

**Job Name**

**Job Type**

Simple Migration

**Repository Connection**

File System Connection

**Output Connection**

Reporting Connection

**Content Service Connection**

--Make a Selection--

Create a new job group for the job

**Job Group:**

--Make a Selection--


CANCEL SAVE

# Configure Job Details

## Steps

1. Be sure to check the modified date range to see that you are picking up all your documents

DETAILS TASKS MAPPINGS FILE SYSTEM CONNECTION REPORTING CONNECTION

Standard Options 

**Id:**  
1679947110997

**Name:**  
File System to Reporting

**Repository Connection:**  
File System Connection

**Output Connection:**  
Reporting Connection

**Content Service Connector:**


Required for Manage in Place and Content Federation


**Type:**  
Simple Migration

**Include File Content:**   
Uncheck to exclude file content. Leave checked for PII and duplicate detection. Also required for full text extraction

**Job Tags**

Add a tag

Include documents modified after this date and time.  
03/28/2018 06:58 AM 

Include documents modified before this date and time.  
03/28/2024 06:58 AM 

# Configure Connector Settings

## Steps

1. Enter the file path for the location of the files

The screenshot shows a configuration interface with five tabs: DETAILS, TASKS, MAPPINGS, FILE SYSTEM CONNECTION, and REPORTING CONNECTION. The 'FILE SYSTEM CONNECTION' tab is active. Below the tabs is a 'Paths' section. Underneath, there is a 'File Path' label and a text input field containing 'C:\Sample Data'. To the right of the input field are four checkboxes: 'Convert To URI', 'Process Folders', 'Include Hidden Files?', and 'Include Empty Folders?'. All checkboxes are currently unchecked.

\*The reporting connector will not need any additional settings for this example



# Create a Data Set

## Steps

1. Go to Data collection under Analytics
2. Click the blue plus button to open the New Data set form



UPDATE CONFIGURATION    DELETE NEW DATA SET    VIEW SET INFO ▼

Current Status: Unsaved    Time until next run: N/A

Data Set Name

New Data Set

OFF Collect Data

OFF Run Jobs in Parallel (Note: Requires restart of set collection to take effect)

Begin Collection Date

04/05/2023 05:30 PM

End Collection Date

05/05/2023 05:30 PM

Interval between runs:

1 Day(s)

Choose between a job group or individual job

JOB

Select a Job:

--Select a Job--

# New Data Set

## Steps

1. Name the Data set
2. Turn Collect Data on
3. Select the Job
4. Click Update Configuration
5. Close the Update successful notification

**UPDATE CONFIGURATION** **DELETE FILESYSTEM** **VIEW SET INFO** ▾

Current Status: WAITING Time until next run: 16h:16m:1s

Data Set Name  
File System

ON Collect Data

OFF Run Jobs in Parallel (Note: Requires restart of set collection to take effect)

Begin Collection Date  
04/02/2023 07:43 AM

End Collection Date  
05/02/2023 07:43 AM

Interval between runs:  
1 Day(s)

Choose between a job group or individual job  
 JOB

Select a Job:  
File System to Reporting



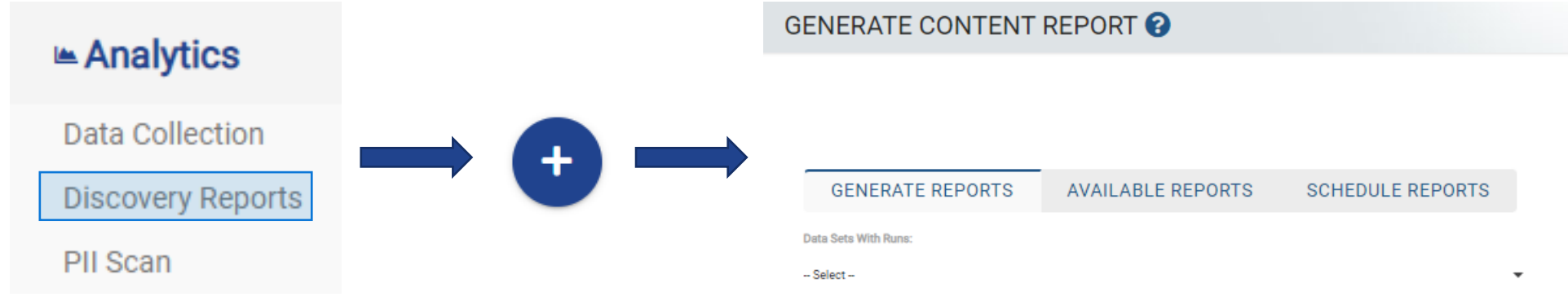
Update Successful. Run will begin immediately

OK

# New Report

## Steps

- Go to Discovery Reports under Analytics
- This will take you to the Generate Report Tab



# Steps

- Select your data set from the drop down
- Check the Use Set box
- Give your report a name
- Click Generate Report

# Generate Report

GENERATE REPORTS AVAILABLE REPORTS SCHEDULE REPORTS

Data Sets With Runs:  
File System - WAITING

Available Data Sets

Search: \_\_\_\_\_

Show 5 entries

RUN DATE	JOB RUNS	READ	PROCESSED	DUPLICATES	ERRORS	USE SET	DELETE
2023-04-05T18:41	1	94	94	0	0	<input checked="" type="checkbox"/>	

OFF Set date for obsolete data

OFF Check Extensions

OFF Check Sizes

OFF Check Document Type

OFF Calculate duplicates data

Report Name:  
File System

GENERATE REPORT

# View Discovery Report

Discovery Reporting

PII Data Viewer

Discovery Report Viewer

## Steps

- Click the [Open Discovery Ui](#) link at the top of the page
- Select Discovery Report Viewer
- Select your generated report from the drop down
- Select the version of the data set you want to visualize based on the date ran.
- View the results of your Data Collection

