DocAve®

Governance Automation

User Guide

For Business Users

Service Pack 3

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Table of Contents

About DocAve Governance Automation

Traditionally, administrators create components or manage their data in SharePoint manually by following a series of requirements. The number of human interactions that occur in business processes can inhibit speed and the quality of decisions.

Governance Automation provides ways to create and govern your SharePoint components automatically by submitting rich and customizable predefined service requests which can trigger corresponding workflows and policies to accomplish the processes. This automation results in more speed, overall effectiveness of the interactions and often a reduction in errors.

This documentation is for business users to make an application for a request or manage their own tasks by Governance Automation; if you are an administrator of Governance Automation, refer to DocAve Governance Automation User Guide for Administrators.

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Getting Started

Refer to the sections below for important information on getting started with Governance Automation.

Understanding Service Requests and Tasks

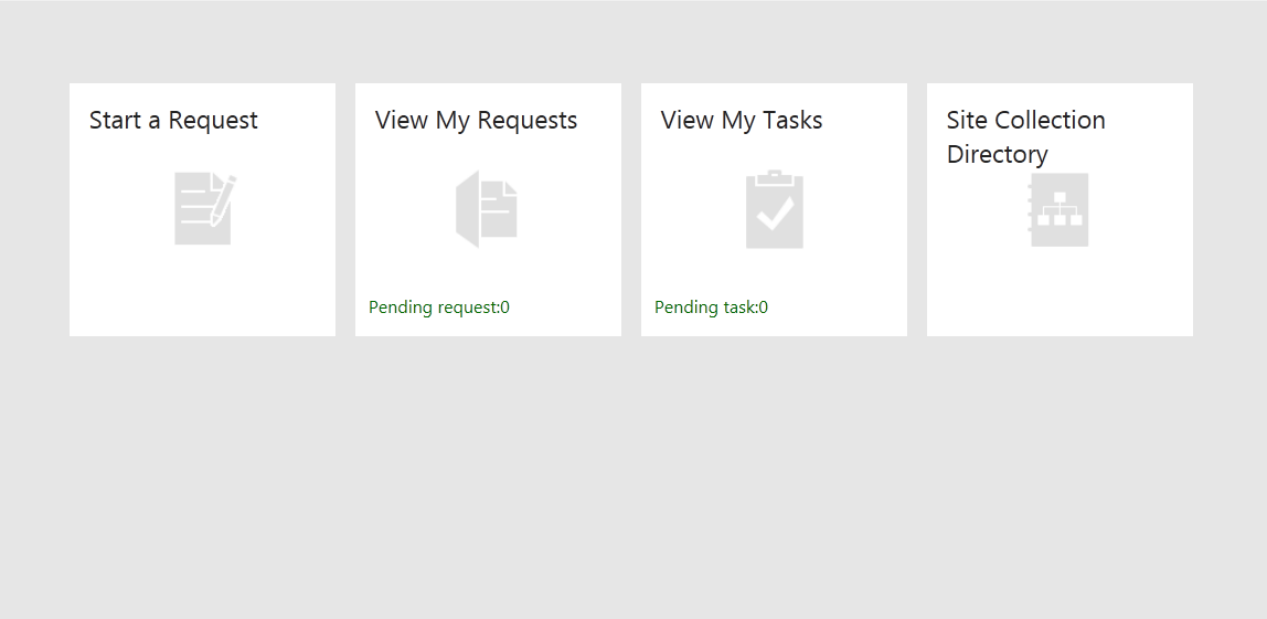
Your SharePoint administrator can create services which contain a set of configured settings for SharePoint operations that comply with your organization's rules and standards. These services are tailored to the needs of different departments and purposes within your organization. As a business user, you will be able to submit requests for these services according to your SharePoint needs. Once you submit a service request, the approval process associated with each corresponding service will automatically notify the designated persons in your organization of your request. After all approvers of a service have approved the request, Governance Automation will perform the necessary operations to complete the service you have requested.

If you are a designated approver for any service, a task will appear in your My Tasks list whenever a request for the service is submitted and any/all previous approvers have approved the request.

Familiarizing Yourself With The Interface

Your Information Technology team will direct you to the appropriate URL or hyperlink, and login method to access Governance Automation. Once you log in, you will be brought to the business user landing page.

The landing page is intended to provide you with essential information about your service requests and Tasks. Use the tiles to navigate through the software. At any point, click **Menu** in the upper left hand corner to return to the landing page.



Starting a Request

To start a request for a service, click **Start a Request** on the landing page of the Governance Automation interface. You will be brought to the **Start a Request** interface, where all of the available services are displayed in your service catalog.

In the **Start a Request** interface:

1. Select a service by clicking the service name.
2. Enter the necessary information in the configuring service request interface.
3. Click **Save** to save the configured settings for later use, or click **Save and Submit** to submit this request to the approvers. Click **Cancel** to return to the **Start a Request** interface without saving any configurations.

***Note:** Services that require users to input URLs are always displayed in your service catalogs.

Searching and Filtering Requests

You can search displayed service requests by entering a service name keyword in the textbox located in the upper right-hand corner.

You can also filter services by language. Click the language filter icon on the top of the screen and select the checkboxes next to the language names to filter by those languages.

Managing Your Requests

In the **My Requests** screen, all of your service requests are displayed, including Submitted Requests that are still awaiting approval and Saved Requests that have already been approved or rejected.

To manage the requests, click **View My Request** in the landing page. Select the **Submitted Requests** or **Saved Requests** tab in the **View My Requests** page to access the corresponding request type.

Submitted Requests

All of the requests that you have submitted are displayed in the **Submitted Requests** tab. To change the number of Submitted Requests displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort Submitted Requests, click in a column heading such as **Service Request**, **Category**, **Service**, **Last Modified Time**, and **Assign to** and select **Ascending** or **Descending**.

You can customize how the Submitted Requests are displayed in a number of different ways:

- Search – Filters displayed service requests by your entered keyword. You can search desired service requests using the following columns: Service Request, Service, and Assign To. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click next to the column name you want to filter, and then select the checkbox next to the item name to have that item shown in the list.

You can perform the following actions on Submitted Requests:

- **View Details** – Click a request name to see more information. Close the interface to return to the All Request interface.
- **Copy** – Duplicate the existing service request to make minor changes in order to submit as a new service request. Select a desired submitted request by checking before the service request name. Click **Copy** on the ribbon, and make the desired modifications. When you have finished making changes, click **Save** to save as a new service request, or click **Save and Submit** to submit this request to the approvers, or click **Cancel** to return to the Start a Request interface without saving any configurations.
- **Cancel Request** – Select a submitted request that you wish to cancel and click **Cancel Request** on the ribbon.

Saved Requests

In the **Saved Requests** tab, all of the requests that you have saved without submitting are displayed. To change the number of saved requests displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the saved requests, click in a column heading such as **Service Request**, **Category**, **Service**, and **Last Modified Time** and select **Ascending** or **Descending**.

You can customize how the saved requests are displayed in a number of different ways:

- Search – Filters displayed service requests by your entered keyword. You can search desired service requests using the following columns: Service Request and Service. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click next to the column name you want to filter, and then select the checkbox next to the item name to have that item shown in the list.

You can perform the following actions on saved requests:

- **View Details** – Click a request name to see more information.
- **Edit** – Select a saved request by clicking before a service request name, and click **Edit** on the ribbon to edit the settings of this request. When you have completed editing the configurations, click **Save** to save all of the settings, click **Save and Submit** to submit this request to the approvers, or click **Cancel** to return to the **Start a Request** interface without saving any configurations.
- **Delete** – Select a request by clicking before a service request name, and click **Delete** on the ribbon. A confirmation window appears. Click **OK** to delete the selected request, or click **Cancel** to return to the **My Request** interface without deleting the selected request.
- **Copy** – Duplicate the existing service request to make minor changes in order to save as a new service request. Select a desired submitted request by clicking before a service request name. Click **Copy** on the ribbon, and make the desired modifications. When you have finished making changes, click **Save** to save all of the settings, click **Save and Submit** to submit this request to the approvers, or click **Cancel** to return to the **Start a Request** interface without saving any configurations.

Tasks

When a service request is submitted and you are one of the approvers of this request, a task will be assigned to you.

To manage your Tasks, click **View My Tasks** in the landing page.

Managing Your Tasks

In the **My Tasks** screen, all of the tasks assigned to you are displayed. To change the number of tasks displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the tasks, click in a column heading such as **Title**, **Requester**, **Category**, **Service Type**, and **Last Modified Time** and select **Ascending** or **Descending**.

You can customize how the Tasks are displayed in a number of different ways:

- Search– Filters displayed Tasks by your entered keyword. You can search desired Tasks by the following columns: Title and Requester. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Allows you to filter which item in the list is displayed. Click the of the column you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Create, Archive, Delete, and Extend Site Collection Tasks

You can perform the following actions on tasks from Create Site Collection, Create Site, Archive Entire Site Collection, Delete Entire Site Collection, and Extend Site Collection services:

- **View Task** – Click a task name to see more information about the task. In the View Details page, click **Approve** on the ribbon to finish this task, or click **Reject** on the ribbon to reject this task.
- **Approve** – Select a desired task, and click **Approve** on the ribbon to approve the task. Enter any comments you may have in the pop-up window. Click **OK** to finish this task, or click **Cancel** to return to the My Tasks interface without executing the task.
- **Reject** – Select a desired task, and click **Reject** on the ribbon to reject the task. Enter comments you may have in the pop-up window. Click **OK** to finish this task, or click **Cancel** to return to the My Tasks interface without executing the task.

Site Collection Lifecycle Management Tasks

You can perform the following actions on tasks from Site Collection Lifecycle Management services:

- **View Task** – Click a task name to see detailed information. In the View Details page, click **Complete** on the ribbon to finish this task, or click **Close** on the ribbon to exit this page.
- **Continue Access** – Select a desired task, and click **Continue Access** on the ribbon if the corresponding site collection is still in use and you would like to request to continue allowing users access to that site collection. In the pop-up window, click **OK** to confirm that you wish to submit this request, or click **Cancel** to return to the My Tasks interface without executing the task.
- **Extend** – Select a task, and click **Extend** on the ribbon to extend the lease for the site collection in this task. In the pop-up window, configure the amount of time to extend beyond the site collection lease period by entering a positive integer in the textbox and selecting **Day(s)**, **Week(s)**, or **Month(s)** from the drop-down menu. Then click **OK** to confirm this action, or click **Cancel** to return to the My Tasks interface without executing the task.
- **Archive** – Select a desired task, and click **Archive** on the ribbon to request that the corresponding site collection be archived. In the pop-up window, click **OK** to confirm that you wish to submit this request, or click **Cancel** to return to the My Tasks interface without executing the task.
- **Delete** – Select a desired task, and click **Delete** on the ribbon to request that the corresponding site collection be deleted. In the pop-up window, click **OK** to confirm that you wish to submit this request, or click **Cancel** to return to the My Tasks interface without executing the task.
- **Change Policy** – Select a task, and click **Change Policy** on the ribbon to change the policy associated with the site collection.

Site Lifecycle Management Tasks

You can perform the following actions on tasks from Site Lifecycle Management services:

- **View Task** – Click a task title to see the detailed information of this task. In the View Details page, click **Approve** on the ribbon to finish this task or **Reject** on the ribbon to reject this task.
- **Archive** –Select a task, and click **Archive** on the ribbon to execute the Archive site task. In the pop-up window, click **OK** to confirm the action or **Cancel** to return to the My Tasks interface without executing the task.
- **Delete** – Select a task, and click **Delete** on the ribbon to execute the delete site task. In the pop-up window, click **OK** to execute the task, or click **Cancel** to return to My Tasks interface without executing the task.

User Permissions and Archive Tasks

You can perform the following actions on the tasks from Clone or Transfer User Permissions, Grant Permissions, Remove Permissions, and Manual Archive services:

- **View Task** – Click a task name to see the detailed information of this task. In the View Details page, click **Approve** on the ribbon to finish this task, or click **Reject** on the ribbon to reject this task. To review detailed report of this task, click **Review the Report** on the ribbon then select **View on screen** or **Download report**.

- **View on screen** – Open the report directly to view details on screen.
- **Download report** – Download the report and then modify the data that you wish to change. In the pop-up window, click **Browse** to select the modified file to upload.

- **Approve** – Select a task, and click **Approve** on the ribbon to approve the task. Enter any comments you may have in the pop-up window. Click **OK** to finish this task, or click **Cancel** to return to the My Tasks interface without executing the task.
- **Reject** – Select a task, and click **Reject** on the ribbon to reject the task. Enter comments you may have in the pop-up window. Click **OK** to finish this task, or click **Cancel** to return to the My Tasks interface without executing the task.

Change Actions, Content Move, and Create Tasks

You can perform the following actions on the tasks from Change Site Collection Contact or Administrator, Change Site Collection Settings, Change Site Contact, Change Site Metadata, Content Move, Create My Site, Create Library/List, Change Library/List Settings services.

- **View Task** – Click a task title to see the detailed information of this task. In the View Details page, click **Approve** on the ribbon to finish this task, or click **Reject** on the ribbon to reject this task.
- **Approve** – Select a task, and click **Approve** on the ribbon to approve the task. Enter some comments for this task for further reference in the pop-up window. Click **OK** to finish this task or **Cancel** to return to the My Tasks interface without executing the task.
- **Reject** – Select a task, and click **Reject** on the ribbon to reject the task. Enter some comments for this task for further reference in the pop-up window. Click **OK** to finish this task, or click **Cancel** to return to the My Tasks interface without executing the task.

Public Site Collection Directory

The Public Site Collection Directory is where business users go to view information on published site collections that are created and managed by Governance Automation. Site Collections with GA_Published metadata are considered "published" site collections. For more information on GA_Published metadata, see the DocAve Governance Automation User Guide for Administrators.

To access the Public Site Collection Directory, click **Public Site Collection Directory** in the **Administrator** landing page.

Managing Public Site Collection Directory Reports

To change the number of directory reports displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the directory reports, click in a column heading such as **Department**, **Policy**, **Site Collection Template**, **Site Collection Size (GB)**, **Status**, and **Site Maximum Depth**, then select **Ascending** or **Descending**.

You can customize how the directory reports are displayed in a number of different ways:

- Search – Filters the displayed directory reports by your entered keyword. You can search desired reports by the following columns: **URL**, **Title**, **Description**, **Primary Site Collection Administrator**, **Secondary Site Collection Administrator**, **Primary Site Collection Contact**, **Secondary Site Collection Contact**, and metadata. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. By default, **URL**, **Department**, **Title**, **Policy**, **Site Collection Template**, **Primary Site Collection Administrator**, **Primary Site Collection Contact**, **Secondary Site Collection Contact**, **GA_Published**, **Content Database Name**, **Quota Template**, **Quota Size (GB)**, **Site Collection Size (GB)**, **Inactivity Threshold Date**, **Lease Period Expiration Date**, **Status**, **Site Maximum Depth** are displayed. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering Public Site Collection Directory Reports

1. Click **Set Filter** on the ribbon to customize the directory report. You can set filters for **URL**, **Site Template**, **Site Collection Size**, **Status**, **Department**, **Policy**, and **Primary Site Collection Contact**. **Filter by Expiration Date** is also supported. Set **Inactivity Threshold Date** and **Lease Period Expiration Date** to add more filter rules.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage.

a. In the pop-up window, choose to export the report to a local path or an export location to store the report.

b. If you choose **Export to an export location**, select an export location from the drop-down menu, or click **Add new location** to redirect to the **Report Export Location** interface to create a new one.

c. Select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section.

d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

Exporting Public Site Collection Directory Reports

To export the currently displayed directory reports, click **Export Report** on the ribbon and then select your desired **Report Export Location** and **Report Format**.

Monitoring and Reporting

To access Monitoring and Reporting, click **Monitoring and Reporting** in the landing page. Monitoring and Reporting screens are where business users who have the appropriate permissions go to:

- Keep track of all requests and tasks created by and assigned to any user
- Review Governance Automation processes
- Gauge the current state of sites and site collections created by Governance Automation

Monitoring

Access the options in the Monitoring category to view detailed information on all requests and tasks.

All Requests Page

The **All Requests** page centralizes all of the submitted service requests created by any users.

To access the **All Requests** page, in the **Monitoring and Reporting** page, click **All Requests**.

To change the number of requests displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the requests, click in a column heading such as **Service Request**, **Requester**, **Category**, **Service Type**, **Service**, **Last Modified Time**, and **Assign to** and then select **Ascending** or **Descending**.

You can customize how the requests are displayed in a number of different ways:

- Search – Filters displayed service requests by your entered keyword. You can search desired service requests by the following columns: **Service Request**, **Service** and **Assign To**. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click next to the column name you want to filter, then select the checkbox next to the item name to have that item shown in the list.

You can select a request and click **View Details** on the ribbon to see the detailed configuration about this request. Click **Close** to return to the All Request interface.

When finished, click **Back** to close the All Requests interface.

All Tasks Page

The **All Tasks** page centralizes all of the tasks assigned to any users.

To access **All Tasks**, or in the **Monitoring and Reporting** page, click **All Tasks**.

To change the number of tasks displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the tasks, click in a column heading such as **Title**, **Category**, **Service**, **Requester**, **Assigned to**, and **Last Modified Time** to select **Ascending** or **Descending**.

You can customize how the tasks are displayed in a number of different ways:

- Search – Filters displayed tasks by your entered the keyword. You can search desired tasks by the following columns: **Requester** and **Assign To**. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click next to the column name you want to filter, then select the checkbox next to the item name to have that item shown in the list.

You can click a task title to see its configurations. Click **Close** to return to the All Request interface. When finished, click **Back** to close the All Tasks interface.

Audit Reports

Audit Reports provide detailed information on all Administrator, service request, and approval process activities:

- **User Activity Report** – Provides detailed information on all actions performed by Governance Automation users, including administrators and business users. Review the User Activity Report to inspect user actions, or check the legality of user behaviors.
- **Service Request Report** – Provides detailed information on all submitted service requests. The Service Request Report displays basic service request information such as service request, name, requester, status, submitted time, assignee, last updated time, and so on.
- **Approval Process Report** – Provides all service request approval process tracks once they are approved. Approval Process Reports can help you optimize your service request flow and make processes more efficient.

User Activity Report Page

To access **User Activity Report**, in the **Monitoring and Reporting** page, click **User Activity Report**. Click **Back** to close the **User Activity Report** interface.

Managing User Activity Reports

To change the number of reports displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the reports, click in a column heading such as **Object**, **Object Type**, and **Action** then select **Ascending** or **Descending**.

You can customize how the reports are displayed in a number of different ways:

- Search – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **User** and **Object Instance Name**. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filter which item in the list is displayed. Click the in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating User Activity Reports

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Object**, **Type**, **Action**, **Time Range** and **User**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage.
    a. In the pop-up window, choose to export the report to a local path or an export location to store the report.
    b. If you chose **Export to an export location**, select an export location from the drop-down menu, or click **Add new location** to redirect to the **Report Export Location** interface to create a new one.
    c. Select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section.
    d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

Exporting User Activity Reports

To export the currently displayed reports, click **Export Report** on the ribbon and then select your desired **Report Export Location** and **Report Format**.

Service Request Report Page

To access **Service Request Report**, in the **Monitoring and Reporting** page, click **Service Request Report**. Click **Back** to close the **Service Request Report** interface.

Managing Service Request Reports

To change the number of reports displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the reports, click in a column heading such as **Service Type**, **Category**, **Department**, **Status**, and **Assign To** then select **Ascending** or **Descending**.

You can customize how the reports are displayed in a number of different ways:

- Search – Filters displayed reports by your entered keyword. You can filter desired reports by the following columns: **Service Name**, **Service Request Name**, **Requester** and **Assign To**. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click the in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Service Request Reports

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Service Type, Service Name, Requester**, and **Assign To**, and **Advanced Filter**, according to **Time Range** and **Department**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage.
    a. In the pop-up window, choose to export the report to a local path or an export location to store the report.
    b. If you chose **Export to an export location**, select an export location from the drop-down menu, or click **Add new location** to redirect to the **Report Export Location** interface to create a new one.
    c. Select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section.
    d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

Exporting Service Request Reports

To export the currently displayed reports, click **Export Report** on the ribbon and then select your desired **Report Export Location** and **Report Format**.

Approval Process Report Page

To access **Approval Process Report**, in the **Monitoring and Reporting** page, click **Approval Process Report**. Click **Back** to close the **Approval Process History Report** interface.

Managing Approval Process Reports

To change the number of reports displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the reports, click in a column heading such as **Service Type**, **Status**, and **Department** then select **Ascending** or **Descending**.

You can customize how the reports are displayed in a number of different ways:

- Search – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **Service Request Name** and **User**. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click the in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Approval Process Reports

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Service Type**, **Service Request Name**, **Status**, **Time Range, Department**, and **User**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage.
    a. In the pop-up window, choose to export the report to a local path or an export location to store the report.
    b. If you choose **Export to an export location**, select an export location from the drop-down menu, or click **Add new location** to redirect to the **Report Export Location** interface to create a new one.
    c. Select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section.
    d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

Exporting Approval Process Reports

To export the currently displayed reports, click **Export Report** on the ribbon and then select your desired **Report Export Location** and **Report Format**.

Administration Reports

Administration Reports provide basic information on all Site Collections and Sites created by Governance Automation:

- **Site Collection Report** – Provides a list of site collections created by Governance Automation along with details such as site collection URL, department, title, policy, site collection template, primary site collection administrator, secondary site collection administrator, primary site collection contact, secondary site collection contact, and so on. You can customize how the report displays the data by considerable criteria.

- **Site Report** – Provides a list of sites created by Governance Automation along with details such as site URL, department, title, site template, primary site contact, and secondary site contact. You can customize how the report displays the data by considerable criteria.

Site Collection Report Page

To access **Site Collection Report**, in the **Monitoring and Reporting** page, click **Site Collection Report**. Click **Back** to close the **Site Collection Report** interface.

Managing Site Collection Reports

To change the number of reports displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the reports, click in a column heading such as **Department**, **Policy**, **Site Collection Template**, **GA_Published**, **Quota Size (GB)**, **Site Collection Size (GB)**, **Status**, and **Site Maximum Depth** then select **Ascending** or **Descending**.

You can customize how the reports are displayed in a number of different ways:

- Search – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **URL**, **Title**, **Description**, **Primary Site Collection Administrator**, **Secondary Site Collection Administrator**, **Primary Site Contact**, **Secondary Site Collection Contact**, and metadata. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the. By default, **URL**, **Department**, **Title**, **Policy**, **Site Collection Template**, **Primary Site Collection Administrator**, **Primary Site Collection Contact**, **Secondary Site Collection Contact**, **GA_Published**, **Content Database Name**, **Quota Template**, **Quota Size (GB)**, **Site Collection Size (GB)**, **Inactivity Threshold Date**, **Lease Period Expiration Date**, **Status**, **Site Maximum Depth** are displayed. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click the in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Site Collection Reports

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for URL, Site Template, Site Collection Size, and Status, and Advanced Filter, according to Department, Policy, and Primary Site Collection Contact. Filter by Expiration Date is also supported. Set Inactivity Threshold Date and Lease Period Expiration Date to add more filter rules.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage.
    a. In the pop-up window, choose to export the report to a local path or an export location to store the report.

b. If you chose **Export to an export location**, select an export location from the drop-down menu, or click **Add new** location to redirect to the **Report Export Location** interface to create a new one.

c. Select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section.

d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

Exporting Site Collection Reports

To export the currently displayed reports, click **Export Report** on the ribbon and then select your desired **Report Export Location** and **Report Format**.

Site Report Page

To access **Site Report**, in the **Monitoring and Reporting** page, click **Site Report**. Click **Back** to close the **Site Report** interface.

Managing Site Reports

To change the number of reports displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort the reports, click in a column heading such as **Department**, **Site Template**, **Primary Site Contact**, and **Secondary Site Contact**, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in a number of different ways:

- Search – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **URL** and **Title**. Only the content in the column displayed in the current view can be searched.
- – Manages which columns are displayed in the list. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Filters which item in the list is displayed. Click in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Site Reports

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **URL** and **Site Template**, **Department**, and **Primary Site Contact**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage.
    a. In the pop-up window, choose to export the report to a local path or an export location to store the report.

b. If you choose **Export to an export location**, select an export location from the drop-down menu, or click **Add new location** to redirect to the **Report Export Location** interface to create a new one.

c. Select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section.

d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

Exporting Site Reports

To export the currently displayed reports, click **Export Report** on the ribbon and then select your desired **Report Export Location** and **Report Format**.

Index

Notices and Copyright Information

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