

SharePoint Essentials Toolkit

2025 Release

Getting Started

Contents

Contents	2
About SharePoint Essentials Toolkit 2025	4
Key Features.....	4
Permission Management.....	4
Content Search (formerly 'Item Query')	4
Link Management	5
Copy Lists.....	5
Inventory	6
Site Analytics.....	6
Governance & User Activity (Coming soon)	7
Add / Remove Users.....	8
Change Site Collection Administrators.....	8
My Connections.....	8
Discovery	8
Job History.....	8
Insights	8
Create Your First Connection.....	9
Creating a Connection.....	9
Authentication Methods	13
Authentication Comparison	13
Add SharePoint Sites	15
Working with Panels.....	18
Run Your First Report.....	20
For All Job Types	20
Run Your First Permissions Report.....	20
Run Your First Link Job	23
Run Your First Analytics Job.....	25
Run Your First Copy Job.....	27
Configure Content Filtering (Enterprise only)	31
To set up Content Filtering (for any job type where it is applicable):	31
Working with Reports.....	32
Table-based Reports	32

About SharePoint Essentials Toolkit 2025

Our goal is to make SharePoint Essentials Toolkit the go-to tool for SharePoint administrators everywhere. The app has been rewritten from the ground up to deliver great performance, robust reports, and a responsive user experience, making you more effective in less time.

Key Features

Permission Management

The Permissions component will allow users to build detailed cumulative permission reports across one or more sites.

Users can also make changes to permissions they find to be invalid.

Features of the Permissions component include:

- Permissions Matrix - Detailed permission reports for multiple site collections in single report.
- Check Account Permissions – Check an accounts access across multiple site collections.
- Orphaned Users – Report on orphaned users (disabled or deleted) and remove orphaned users in bulk. This feature follows best practices from Microsoft for removing users ([Remove users from SharePoint - SharePoint in Microsoft 365 | Microsoft Learn](#))
- User Inventory (part of Inventory component) – Report on all users in every site collection, with ability to remove users in bulk completely from site collections. This feature follows best practices from Microsoft for removing users ([Remove users from SharePoint - SharePoint in Microsoft 365 | Microsoft Learn](#))

Example Use Cases:

- An employee has left the organization, and you need to remove their account completely from SharePoint tenant.
- Need to fulfill compliance obligations to review and validate access to all site collections and content.
- Need to determine count of all SharePoint users across tenant.
- Need an efficient way to check a user's access to all site collections in the tenant and remove them completely.

Content Search (formerly 'Item Query')

The Content Search component (formerly known as 'Item Query') provides users with the ability to find content within SharePoint and optionally replace content.

This component is different from SharePoint Search, as it will allow:

- Uses a 'literal' search approach (can find results within HTML for example)
- Search results for web parts (by name) in pages
- Search results for HTML markup and JavaScript code. SharePoint search will not show matches for HTML markup such as div tags or JavaScript, such as to remove custom scripts in a SharePoint environment or that came from an on-premises set up.

- Search for text in files and provide criteria for search parameters such as must contain SharePoint Field that has a value of 'ABC Company' or file content containing ABC Projects'.
- Search results are in grid format with detailed information about result items, such as metadata values, author, last modified information, snippet of matching phrases.
- Allows replacement of text.
- Export results to Excel or SharePoint List.

Some examples include:

- Find all web parts with title that contains 'News'.
- Find all web pages that contain text 'old company name' and change to 'new company name'.
- Find all documents that contain text 'classified data'.
- Find all documents that are password protected.
- Find all documents that are checked out.
- Find all items with a URL path larger than 400 characters.
- Find all duplicate files (users can set parameters on what to consider duplicate, such as 'File Name' is equal & total number of lines in content is equal or byte size is equal).

Example Use Cases:

- A company has been acquired, need to rename to new company name.
- Sensitive information must be found in content and removed/replaced.
- Product name has changed and must be renamed in all documentation.
- Migration performed and need to find old unsupported web parts in pages.
- Users report errors that they cannot open files as file path length is too long.

Link Management

The Link Management component will allow users to report on all hyperlinks in their environment. Users can also show all of the broken links in their environment/site collections, or specific links.

This component also can replace links with a new value.

Example Use Cases:

- Migration performed and need to update links pointing to old environment/site to the new environment/site.
- Site is moved to new location and document links are broken.
- List or library is moved to a new location and links are broken.
- Find all sites with the most broken links.
- Find top linked documents and convert to use durable links.

Copy Lists

The Copy Lists component will allow users to copy one or multiple lists to a new location. This component will optionally include automatic creation of the lists / libraries copied, including SharePoint Columns (and metadata values), version history for each file, permissions.

The copy lists feature will also retain the created date, author and last modified information.

This component supports copying multiple lists to a single site, copying multiple lists to multiple sites, and a single list to copy to multiple sites.

Example Use Cases:

- Migration from one site to a new site.
- A large library must be split up into smaller libraries and you need to copy a folder to a new location and retain version history and permissions.
- Need to copy a list (such as a list to be used like a template) from one list, to multiple project sites.
- Need to merge multiple lists from multiple sites, into a new (single) site.

Inventory

This component allows users to build reports for SharePoint sites, lists & libraries, items/files/pages, SharePoint fields, content types, and SharePoint users across the environment.

Inventory Reports available:

- SharePoint Site Inventory
- SharePoint List (and Library) Inventory
- SharePoint Field Inventory (site column and list column level)
- SharePoint Content Type Inventory (site and list level)
- SharePoint User Inventory

The reports will include detailed information about each site, list, item, field, content type and user.

Example Use Cases:

- Need to build a report on all sites and their items count.
- Need to build a report on all sites with external users that have access.
- Need to build a report on all sites that have external sharing enabled, and then turn them off in bulk.
- Need to find all lists and libraries that are considered large and above List View Threshold.
- Need to rename or change a content type and need to find where it is in use.
- Need to find where a SharePoint Column is used as it must be changed to use Content Type hub.

Site Analytics

(SharePoint Online only)

The Site Analytics component will provide visibility into documents and pages that have the most views, as well as documents and pages that are 'stale' or 'unused'.

Users can view reports in a merged summary of all activity, or separate graphs for each site.

- Site Visits for one or more SharePoint site collections
- Item, file and web page visits
 - Top viewed documents and web pages

- Least viewed/modified (unused) documents and web pages

Example Use Cases:

- Need to find stale documents to adhere to audit policies.
- Need to find stale documents to migrate to lower cost storage.
- Need to find top used documents to improve: search keywords, ensure links valid, ensure permissions correct.
- Need to find unused sites to adhere to governance policies.
- Need to find unused sites to mark for deletion.
- Need to find top used sites to improve: search keywords, ensure links valid, ensure permissions correct.

Governance & User Activity (Coming soon)

(SharePoint Online only)

The Governance & User Activity components are separate but go hand in hand.

The User Activity reports will use the Unified Audit Logs in the Azure Compliance Center to provide insight into what users have been doing, some events include users that have:

- Accessed content
- Deleted content
- Downloaded content
- Uploaded content
- Shared content
- Granted permissions
- Removed permissions

The Governance component will allow users to subscribe and set up a record of important events.

- Record an event if a user shares a file to an external user
- Record an event if a user uploads more than 50 documents

The Governance component will optionally create a SharePoint list, which will contain events that have been added to be recorded by the SharePoint Essentials Toolkit.

Users can then send the events for review to the site owner or person responsible, for example, “If a user shares a folder, (add to SharePoint Governance events list) assign to ‘Site Owner 1’ for review to approve or mark event as valid or requires action.

Users will also be able to optionally enable desktop notifications for events.

For example: “Send me a desktop notification and record in Governance history whenever someone shares a file within the Confidential Documents library.”

Add / Remove Users

This feature will allow users to remove accounts in bulk.

This is useful if one or more users have left an organization or no longer should have access to one or more SharePoint sites and must be removed.

Change Site Collection Administrators

This feature will allow users to easily add or remove site collection administrators.

This feature is useful for SharePoint Administrators who need to add themselves in bulk to multiple sites or change a site collection administrator to a new user account.

My Connections

This feature allows users to set up 'Connection Profiles' to connect to different tenants or SharePoint on-premises web applications.

Authentication Types supported:

- Username and Password
- Web Browser Authentication with or without Azure App registration
- Certificate Authentication

Discovery

This component provides ability to 'discover' SharePoint sites, lists, people and content using SharePoint search to a grid table that allows easy export to Excel or SharePoint list.

This component includes an 'Auto-Discovery' feature which allows auto discovery of sites and lists to automatically include in jobs. This is useful to dynamically find sites to run reports against such as on a schedule.

Job History

This allows users to view previous jobs and work performed. Reports and logs can be retrieved and viewed from here.

Insights

This component provides a simple view of important information about the sites they manage (added to the product 'Home Page Dashboard'). Sites that have been added to the Home Page Dashboard will have Insights listed for them when a sync job is run (automatic).

Example information includes:

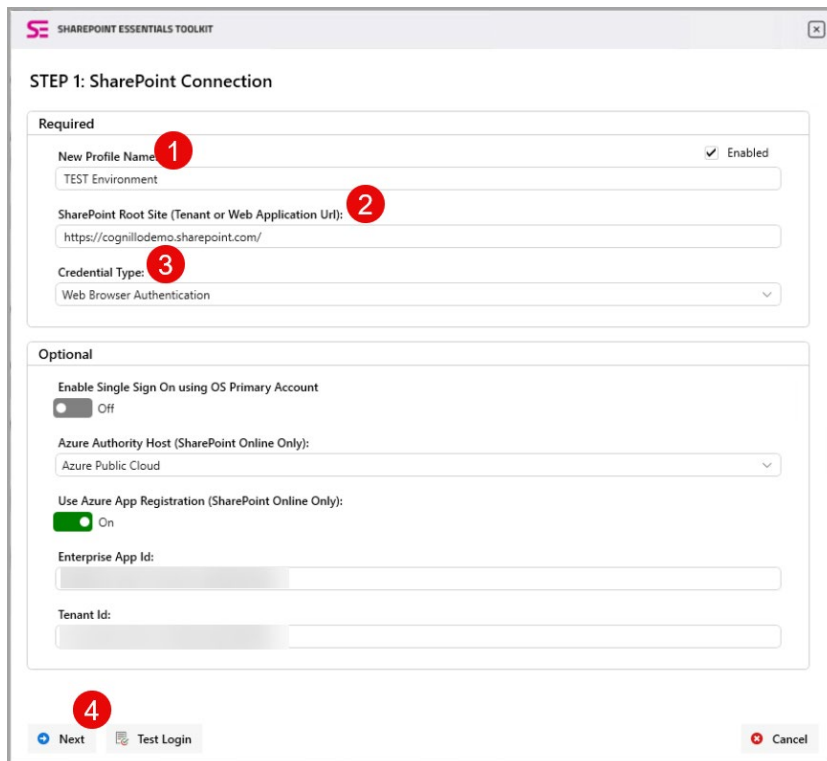
- Number of Unused Sites
- Number of Unused Lists
- Number of Large Lists
- Number of Sites that are Open to Everyone
- Number of Lists that are Open to Everyone

Create Your First Connection

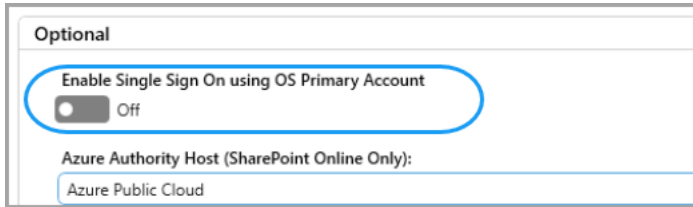
- Once the product is installed, you will need to first create a SharePoint Connection, this is the 'connection' the tool will use to access SharePoint.
- You can set up more than one connection. However, the first connection found will be used by the tool. In a future update, you will be able to force selection of a profile to use before you execute a job.
- The steps for setting up the connection are different depending on the authentication method chosen.

Creating a Connection

1. In SharePoint Essentials Toolkit, click My Connections in the left navigation.
2. Click Create New.
3. Enter the name of the profile, such as “My Production Environment”
4. Enter the root web application or tenant URL.
 - a. i.e. <https://mycompany.sharepoint.com/>
 - b. Do not use the admin site URL (i.e. <https://mycompany-admin.sharepoint.com>).
 - c. For SharePoint on-premises, use the web application URL (i.e. <https://spfarm>).
 - d. You can also specify a site collection URL if you need to use different credentials for different site collections.
5. You will now need to select the authentication type. The recommended option is Web Browser Authentication. See [Authentication Methods](#) section for more information.



6. (Optional) Use 'Enable Single Sign On using Primary OS Account' if your environment has Conditional Access Policies which require the current logged in Windows account to connect using SSO (Single Sign On) for device authentication.



Optional

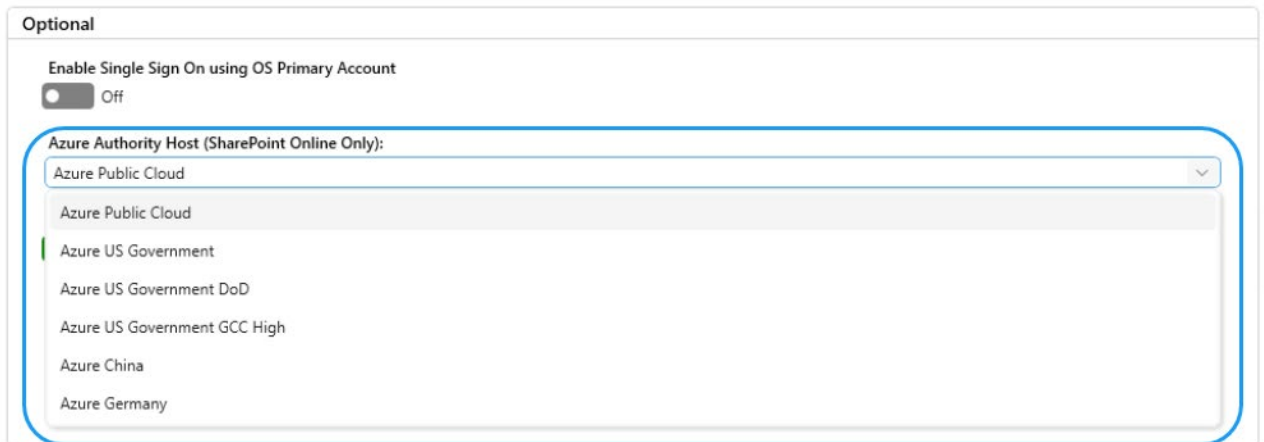
Enable Single Sign On using OS Primary Account

☐ Off

Azure Authority Host (SharePoint Online Only):

Azure Public Cloud

7. (SharePoint Online only) Azure Authority Host – You may need to modify this setting if you are using SharePoint Online and on government cloud, such as GCC High. Non-government customers are typically on 'Azure Public Cloud'.



Optional

Enable Single Sign On using OS Primary Account

☐ Off

Azure Authority Host (SharePoint Online Only):

Azure Public Cloud

Azure Public Cloud

Azure US Government

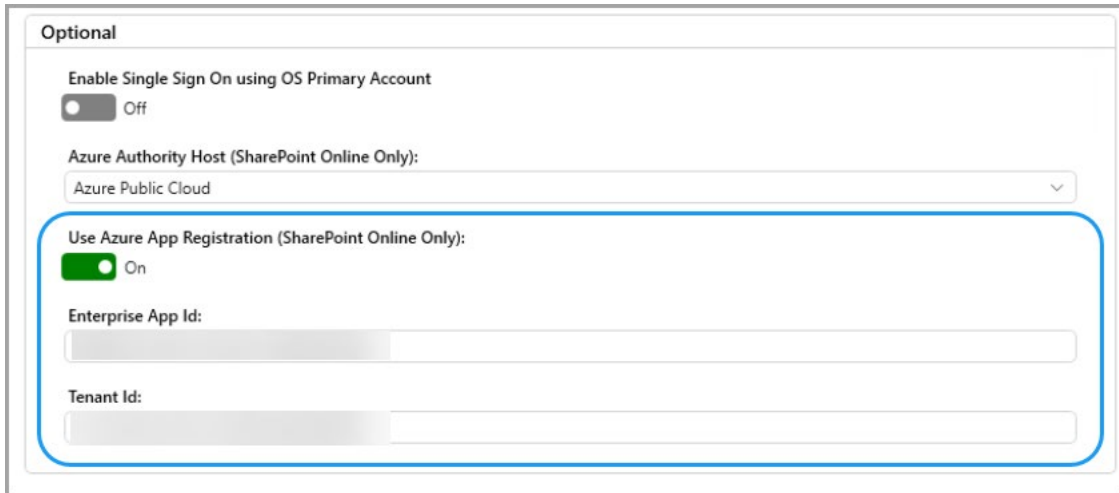
Azure US Government DoD

Azure US Government GCC High

Azure China

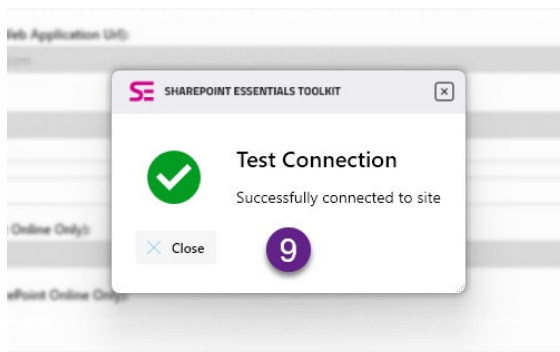
Azure Germany

8. (Optional) (SharePoint Online only) Configure **Azure App Registration** to gain greater reporting benefits. See the "[SharePoint Essentials Toolkit Installation & Deployment Guide](#)" to get help with settings this up. For limitations if this is not enabled, see [this](#) section.





IMPORTANT: Azure App Registration is required for **Permission Reports** to show members within domain groups, including inside of M365 Team Groups. **Site and Content Analytics** also requires Azure App Registration.

9. You can click “Test Connection” to ensure it is working.



10. Click “Next” (if using Connection Wizard for the first time) or “Save”
11. You should now see a screen where you can begin adding SharePoint sites. See [“Add SharePoint Sites”](#) section.

 SHAREPOINT ESSENTIALS TOOLKIT 

STEP 2: Add SharePoint Sites ✓ Successfully saved Connection Profile

Auto Discovery Add Manually

Required

Home Page Dashboard Group:
My Production Environment

SharePoint Site / Tenant / Web Application Url:
https://cognillodemo.sharepoint.com/

Optional

Filters:

Find sites where Site Url contains Enter a value OR Add

Filter

Delete Selected Clear All

Site Template:

⏮ Back

🔍 Start Discovery

✕ Close

Authentication Methods

Choosing an authentication method is a key decision in setting up the SharePoint Essentials Toolkit. The choices are:

- Username and Password
- Web Browser Authentication (WBA) with Azure Registration
- Web Browser Authentication (WBA) without Azure Registration
- Certificate Authentication with Azure Registration

WBA with or without Azure Registration will be the best choice for many users. For Certificate authentication, please refer to the User Manual for detailed instructions.

[Azure App registration](#) is a secure way for Azure Tenants to understand which applications can be trusted to access the company directory and information such as usernames and group names for authentication and report information. Cognillo does **not** have access to company information. This 'app registration' mechanism is used to delegate access to users through the application (Certificate-based authentication will not delegate access and uses application permissions assigned in the tenant).

Recommended Authentication Method: Web Browser Authentication

In most cases, WBA (Web Browser Authentication) is recommended.

WBA is required if you are:

- Using Multi-Factor Authentication (MFA)
- Using a federated service such as Active Directory Federation Services (AD FS)
- Using any third-party authentication provider
- Using Single Sign On (SSO)

Authentication Comparison

This table shows which SharePoint Essentials Toolkit features are supported depending on the authentication method chosen. For more information on the authentication methods, see Choose Authentication Method.

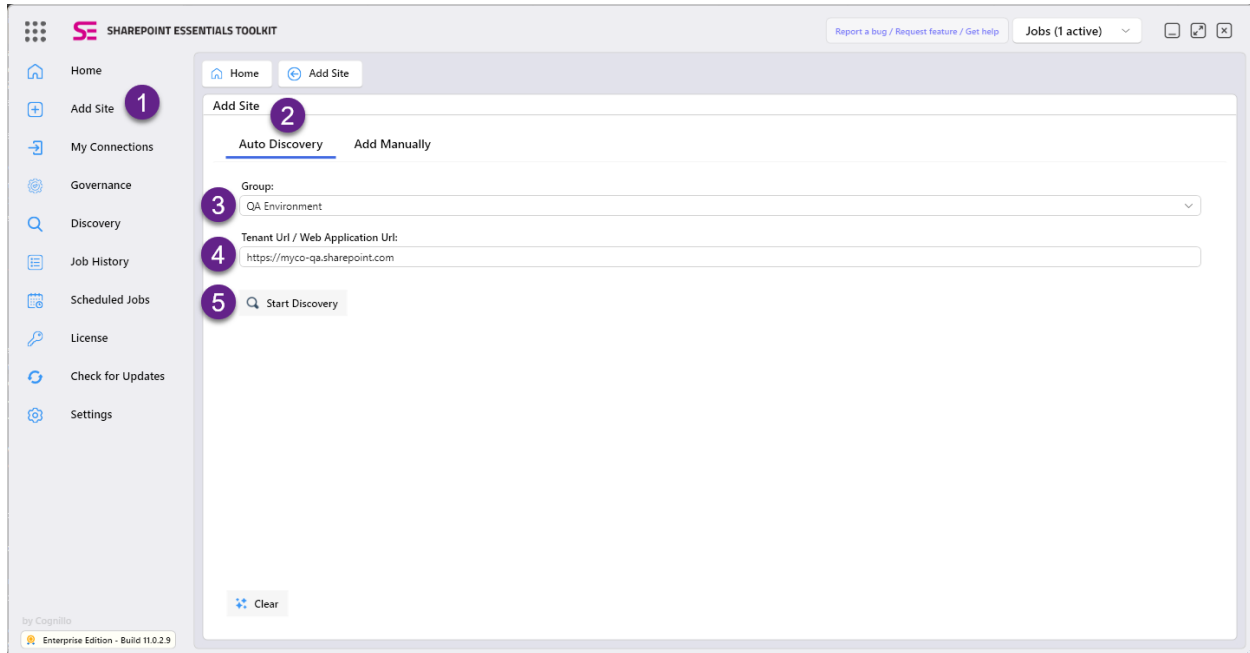
Authentication Method	Username and Password	WBA without Azure Registration	WBA with Azure Registration	Certificate
Effort to set up	Least effort	Simple	More complex	Complex
Supports MFA	No	Yes	Yes	N/A
Requires assistance from an Azure admin	No	No	Yes	Yes
Supported by SP Online	Yes (less secure)	Yes	Yes	Yes
Supported by SP on-premises	Yes	Yes	No	No

Supports link jobs	Yes	Yes	Yes	Yes
Supports analytics jobs	No	No	Yes	Yes
Supports permissions jobs	Yes	Yes	Yes	Yes
Supports copy jobs	Yes	Yes	Yes	Yes
Domain group member permissions for permissions jobs* and site and content analytics jobs	No	No	Yes	Yes
Supports governance features (future update)	No	No	Yes	Yes
Login screen pops up when running jobs	Yes	Yes	Yes	No
Requires certificate	No	No	No	Yes

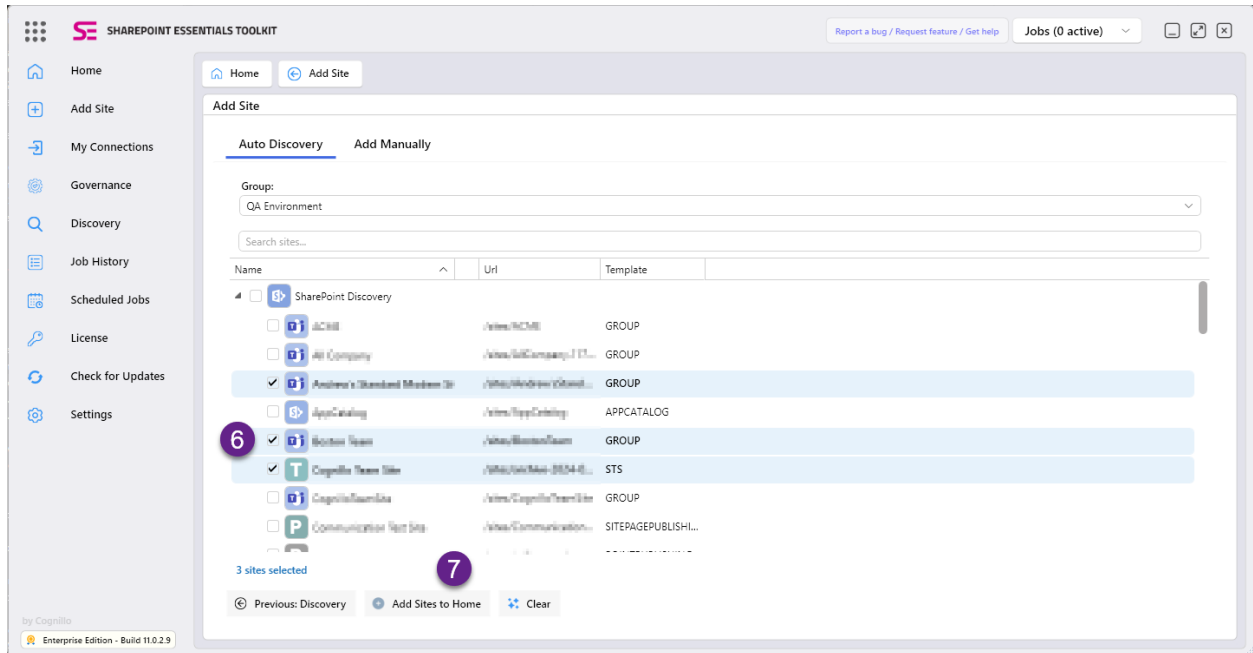
* Without Azure App Registration, permissions job reports will show domain groups but will not show members inside those groups. With Azure App Registration, the reports will show members inside those groups, as well as nested domain groups.

Add SharePoint Sites

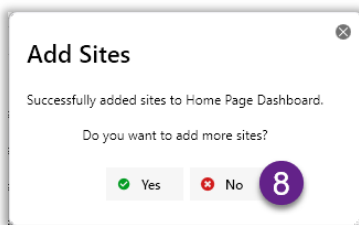
Sites can be added to Home from Add Site or from Discovery. In this Quick Start, we will add them from Add Site. Once sites are on Home, you will be able to run jobs against those sites.



1. In SharePoint Essentials Toolkit, click Add Site in the left navigation.
2. Ensure the Auto Discovery tab is selected.
3. Enter a Group name. Sites with the same Group name will appear together on your Home page (ex. Sites with the Group name “QA” will all appear together under “QA” on your Home page).
4. For Site Url:
 - a. For SharePoint Online, use the tenant url (ex. <https://mycompany.sharepoint.com>). Do not use the admin site url (ex. <https://mycompany-admin.sharepoint.com>).
 - b. For SharePoint on-premises, use the web application url (ex. <https://spfarm>).
5. Click Start Discovery. SPE will call SharePoint APIs to discover sites. You may be prompted to enter your credentials in a popup or browser window, depending on the authentication method being used.



6. A tree view of sites should appear with “SharePoint Discovery” as the top node. Scroll through the list and check any sites you want to add to this Group on your Home page.
7. Click Add Sites to Home.
8. A confirmation popup appears. Click Yes to continue adding sites. Click No to go to the Home page.

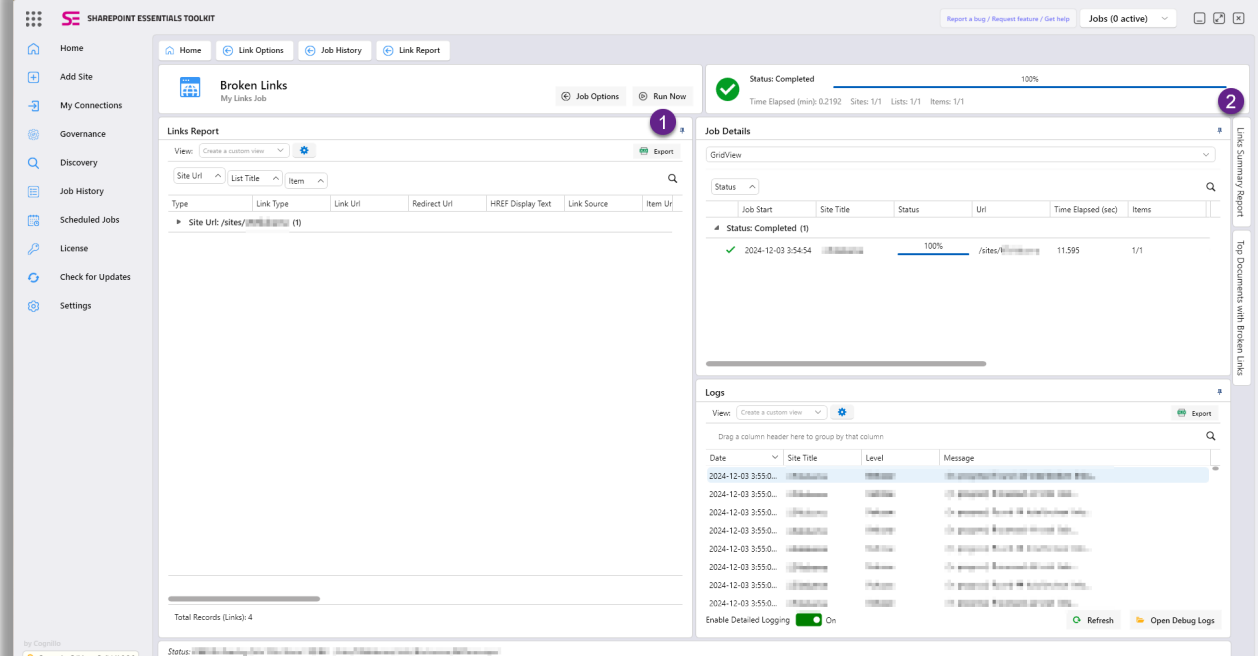


9. When you have finished adding sites, go to the appropriate section in this document to run your first job.

Working with Panels

Many screens in SharePoint Essentials Toolkit are made up of panels. You can show/hide and resize panels as needed.

TIP: If you have multiple monitors, you can drag a panel, such as a report to another monitor for better viewing.



The screenshot displays the SharePoint Essentials Toolkit interface. The left sidebar contains navigation links: Home, Add Site, My Connections, Governance, Discovery, Job History, Scheduled Jobs, License, Check for Updates, and Settings. The main area is divided into two panels. The 'Broken Links' panel (labeled 1) shows a 'Links Report' with a table of links. The 'Job Details' panel (labeled 2) shows a 'Status Completed' indicator and a progress bar. The 'Logs' panel at the bottom right shows a table of logs with columns for Date, Site Title, Level, and Message.

Date	Site Title	Level	Message
2024-12-03 3:55:0...
2024-12-03 3:55:0...
2024-12-03 3:55:0...
2024-12-03 3:55:0...
2024-12-03 3:55:0...
2024-12-03 3:55:0...
2024-12-03 3:55:0...
2024-12-03 3:55:0...

1. To unpin a panel, click the pin at the top right. It moves to a tab on the far right.
2. To show a hidden panel, click the tab on the far right. To hide the panel, click on any area in the app outside of the panel.
3. To pin a panel that was hidden, click the pin at the top right.
4. To rearrange panels, click-and-drag the panel's header.
 - a. Drop it onto one of the widgets to control where it will appear.

SHAREPOINT ESSENTIALS TOOLKIT

Report a bug / Request feature / Get help

Jobs (0 active)

Home

Add Site

My Connections

Governance

Discovery

Job History

Scheduled Jobs

License

Check for Updates

Settings

Home

Link Options

Job History

Link Report

Broken Links

My Links Job

Job Options

Run Now

Status: Completed

Time Elapsed (min): 0.3837 Sites: 1/1 Lists: 1/1 Items: 1/1

Links Report

View: Create a custom view

Export

Site Uri

List Title

Item

Type

Link Type

Link Uri

Redirect Uri

HREF Display

Site Uri: /sites/USAlabama (1)

Total Records (Links): 4

Job Details

GridView

Status

Job Start

Site Title

Status

Uri

Time Elapsed (sec)

Items

Items Skipped

Items Timed Out

Status: Completed (1)

2024-12-03 3:51:23

USAlabama

100%

/sites/USAlabama

19.572

1/1

0/1

0/1

Logs

View: Create a custom view

Export

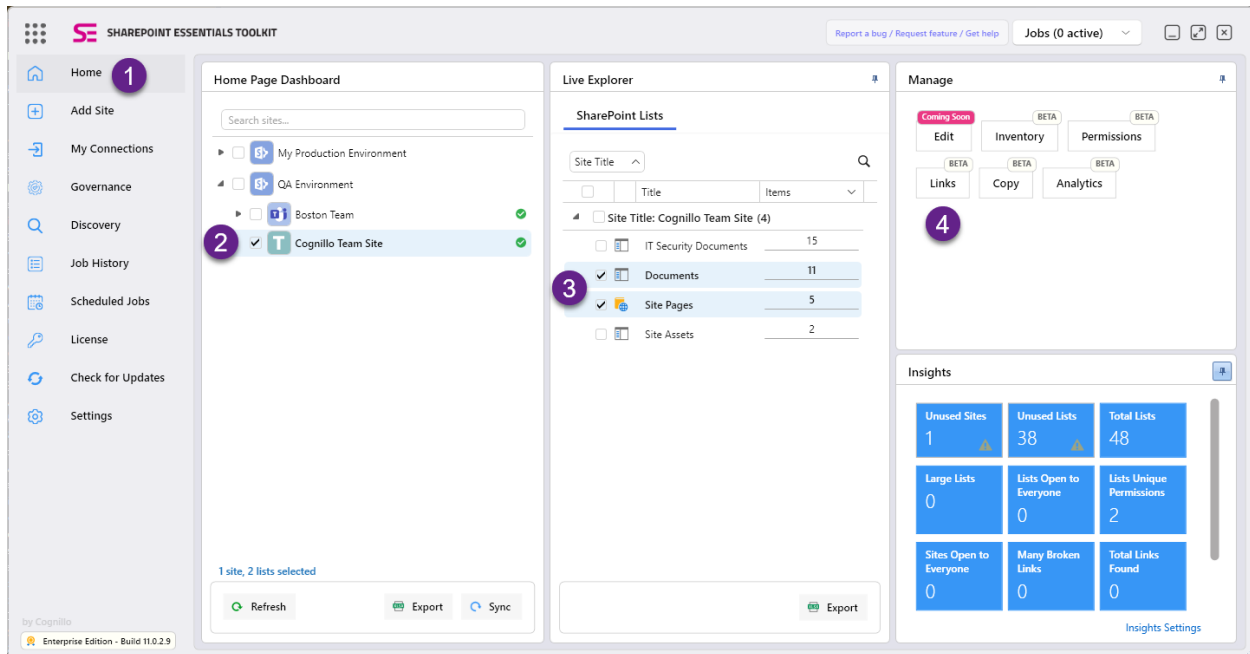
Drag a column header here to group by that column

Date	Site Title	Level	Message
2024-12-03 3:51:3...	USAlabama	Information	DEBUG: Started reading c
2024-12-03 3:51:2...	USAlabama	Important	Fetching items batch 0 to
2024-12-03 3:51:2...	USAlabama	Information	Fetching list items from 'A
2024-12-03 3:51:2...	USAlabama	Important	Processing items in list 's
2024-12-03 3:51:2...	USAlabama	Warning	Inclusion rules not matche
2024-12-03 3:51:2...	USAlabama	Information	DEBUG: Reading field 'Act
2024-12-03 3:51:2...	USAlabama	Information	DEBUG: Reading field 'Rel
2024-12-03 3:51:2...	USAlabama	Information	DEBUG: Reading field 'Me
2024-12-03 3:51:2...	USAlabama	Information	DEBUG: Reading field 'Do

Run Your First Report

A Job is a task that is run against one or more sites and/or lists in SharePoint. Jobs produce reports that are updated in real-time as the job is running. All jobs and their results are saved to Job History.

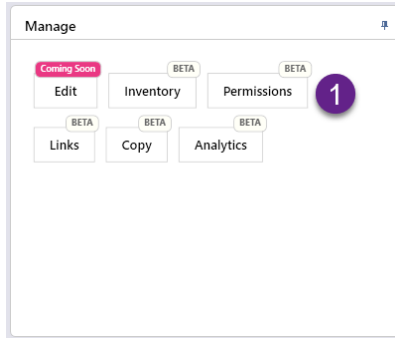
For All Job Types



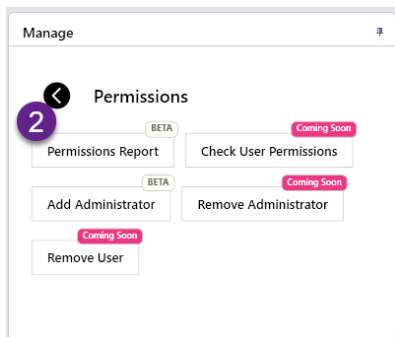
1. In SharePoint Essentials Toolkit, click Home in the left navigation.
2. Check one or more sites in the Home Page Dashboard. The Live Explorer will automatically update to show lists in each site.
 - a. TIP: For your first job, we recommend running it against a single document library in a test environment. Only expand to live data and larger amounts of data when you are comfortable configuring a job so that it will produce the results you expect.
3. Optionally check one or more lists in each site.
 - a. On a given site, the job will be run against any lists that are checked in Live Explorer.
 - b. If you do not check a list in a site, the job will be run against the entire site.
4. Under Manage, choose the type of job you want to run, then see below for steps to configure the job with basic settings.

Run Your First Permissions Report

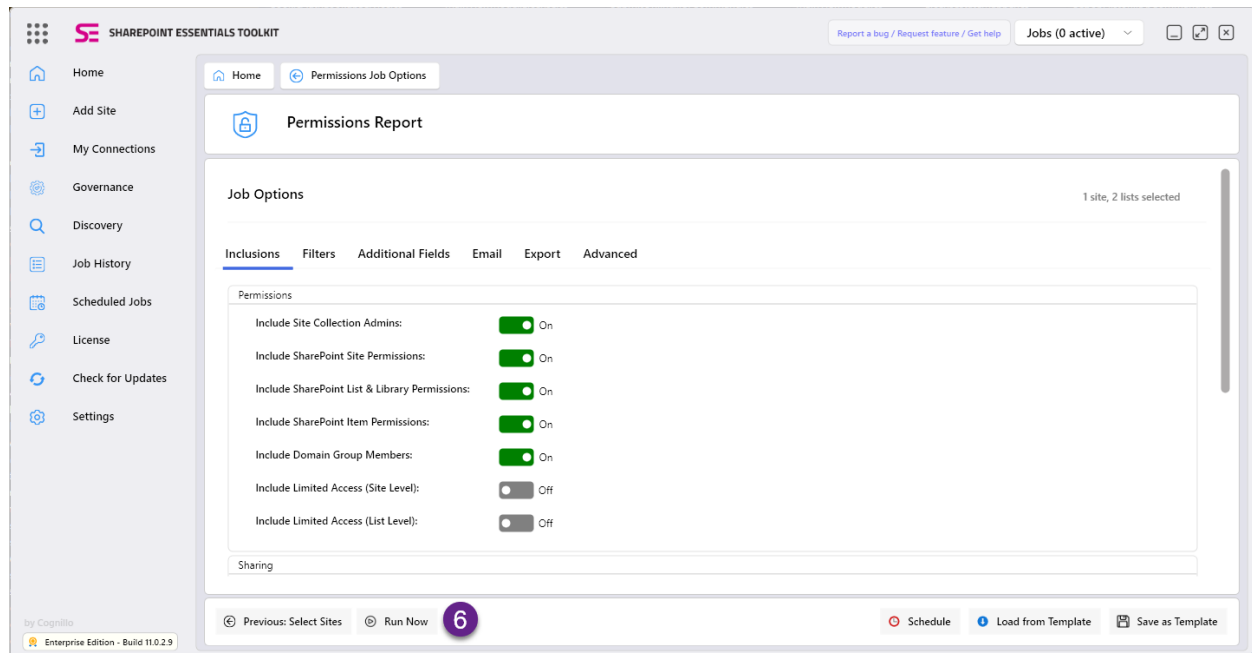
1. After selecting sites/lists from the Home Page Dashboard and Live Explorer, in the Manage panel, click Permissions.



2. Click Permissions Report.



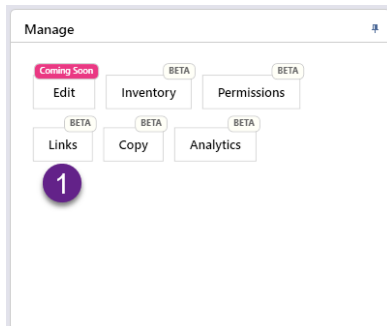
3. Verify the correct site(s) and list(s) are shown. Optionally click Edit to change the Job Name, Selected Sites, or Selected Lists.
4. Click Next: Options.
5. For now, we will use the default options.
 - a. See the User Guide for detailed descriptions of each available option.
 - b. See below for setting up Content Filtering (Enterprise only) to limit the job to specific items.
6. Click Run Now.



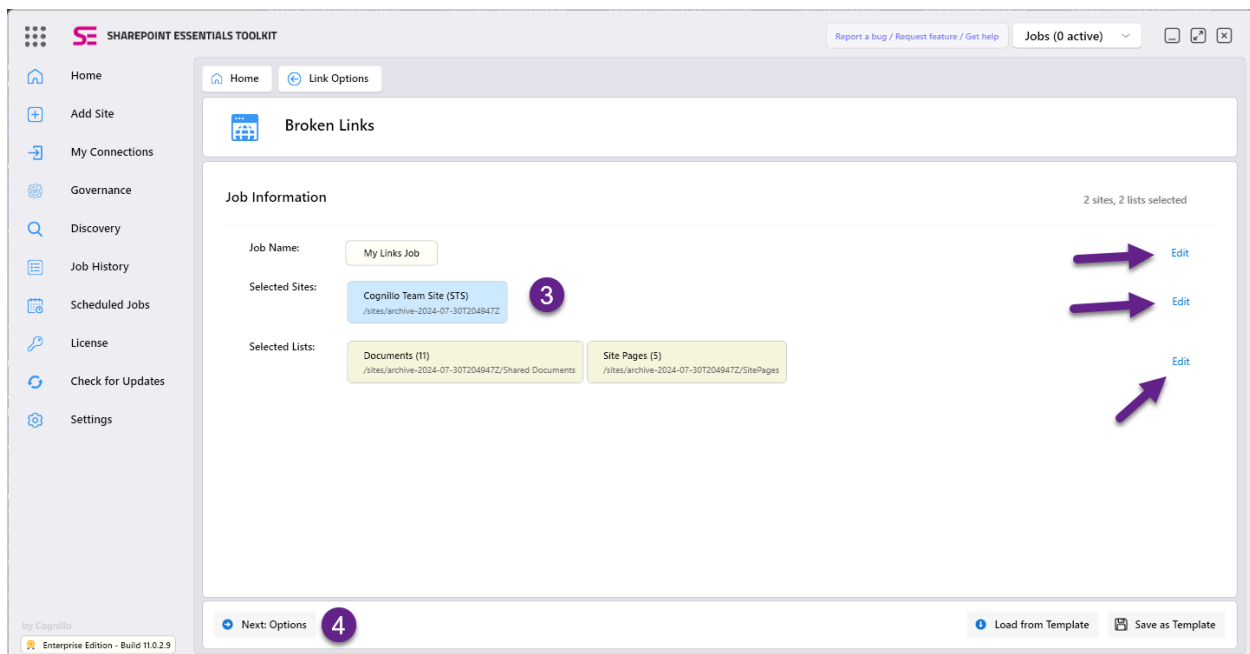
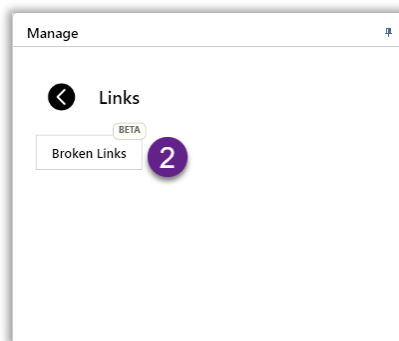
7. The Permissions Report will appear. It will be updated in real time as the Permissions job is running.
8. See Working with Reports below.

Run Your First Link Job

1. After selecting sites/lists from the Home Page Dashboard and Live Explorer, in the Manage panel, click Links.

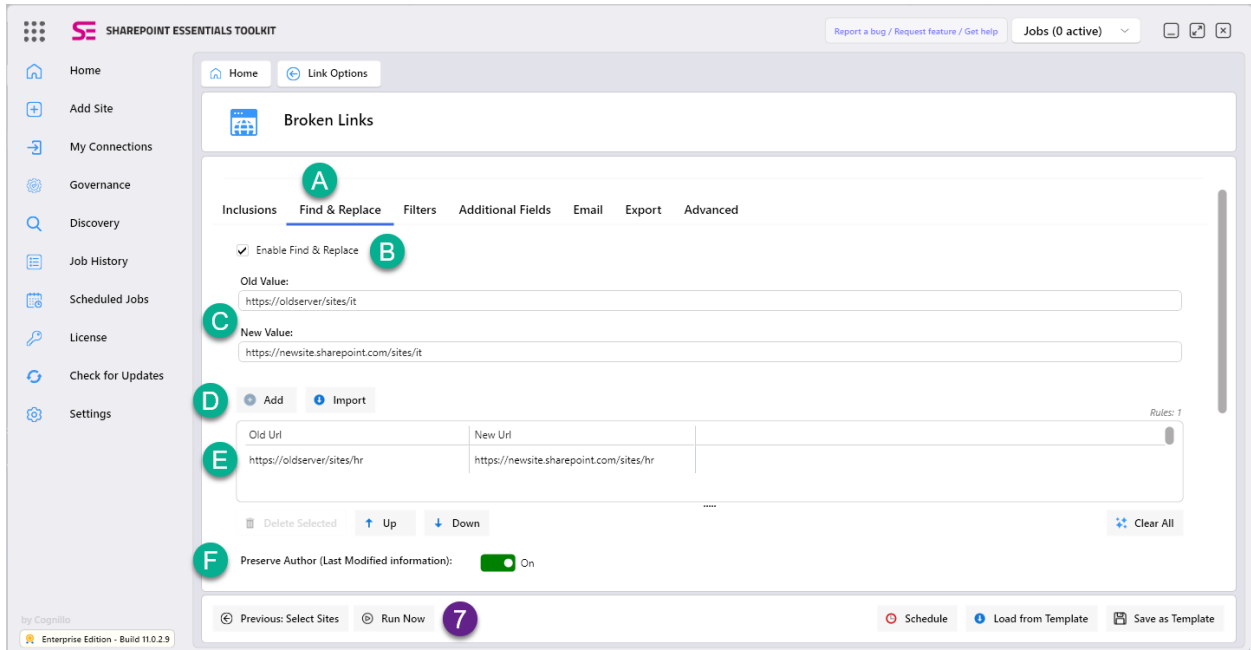


2. Click Broken Links.



3. Verify the correct site(s) and list(s) are shown. Optionally click Edit to change the Job Name, Selected Sites, or Selected Lists.

4. Click Next: Options.
5. For now, use the default options.
 - a. See the User Guide for detailed descriptions of each available option.
 - b. See below for setting up Content Filtering (Enterprise only) to limit the job to specific items.
6. Optionally configure Find & Replace (Professional and Enterprise only).
 - a. Click Find & Replace.
 - b. Ensure Enable Find & Replace is checked.
 - c. Enter text for Old Value and New Value.
 - d. Click Add.
 - e. The rule appears in the table.
 - f. If appropriate, check Preserve Author.
 - i. When a link is changed by SPE, the item version history will show that the change was made by user logged in to SPE at the date and time the change was made.
 - ii. When Preserve Author is checked, SPE will create an additional version history entry with the date/time and author of the last change made before SPE updated the link.
 - g. TIP: Find & Replace is a powerful tool for fixing and maintaining links. We recommend testing Find & Replace rules thoroughly against test libraries to ensure they will produce the expected results when run against live data.
 - h. TIP: Find & Replace rules are processed in the order in which they appear. Arrange them carefully!



SHAREPOINT ESSENTIALS TOOLKIT

Home | Link Options

Broken Links

Inclusions | **Find & Replace** | Filters | Additional Fields | Email | Export | Advanced

☒ Enable Find & Replace

Old Value:
https://oldserver/sites/it

New Value:
https://newsite.sharepoint.com/sites/it

+ Add + Import

Old Url	New Url
https://oldserver/sites/hr	https://newsite.sharepoint.com/sites/hr

Delete Selected | Up | Down | Clear All

Preserve Author (Last Modified information): ☒ On

Previous: Select Sites | Run Now | Schedule | Load from Template | Save as Template

7. Click Run Now.
8. The Links Report will appear. It will be updated in real time as the Links job is running.
9. See Working with Reports below.

Run Your First Analytics Job

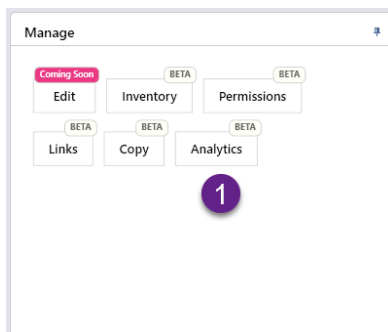
IMPORTANT: Analytics jobs use Microsoft Graph API to fetch analytics data collected automatically by SharePoint Online.

Limitations

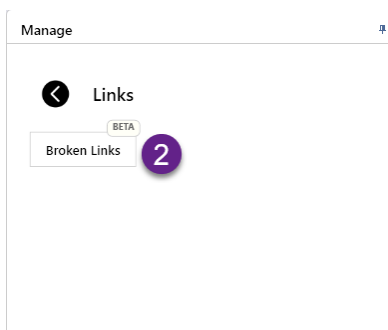
1. Analytics is supported by SharePoint Online only. Analytics for SharePoint on-premises is not supported.
2. All the Graph API analytics endpoints used by SharePoint Essentials Toolkit are supported by SharePoint Online public cloud. See Choose Authentication Method for additional details on what analytics features are supported on other SharePoint Online cloud deployments, including US Government.
3. The connection must be configured to use Web Browser Authentication with Azure Registration. See above for instructions on how to configure this.
4. Graph API supports up to the last 90 days of data. Therefore, we recommend running analytics reports at least once every 90 days. SharePoint Essentials Toolkit will store the results of each job on disk, and over time you will have a history of analytics reports that you can access with Job History.

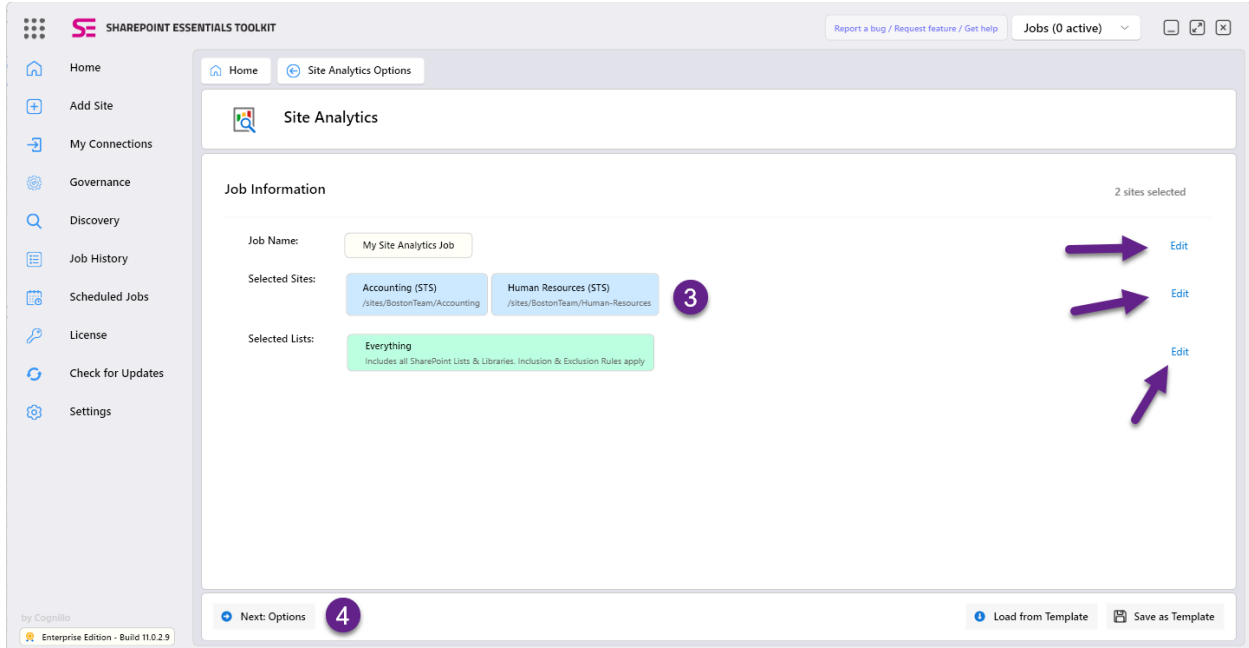
Running an Analytics Job

1. After selecting sites/lists from the Home Page Dashboard and Live Explorer, in the Manage panel, click Analytics.



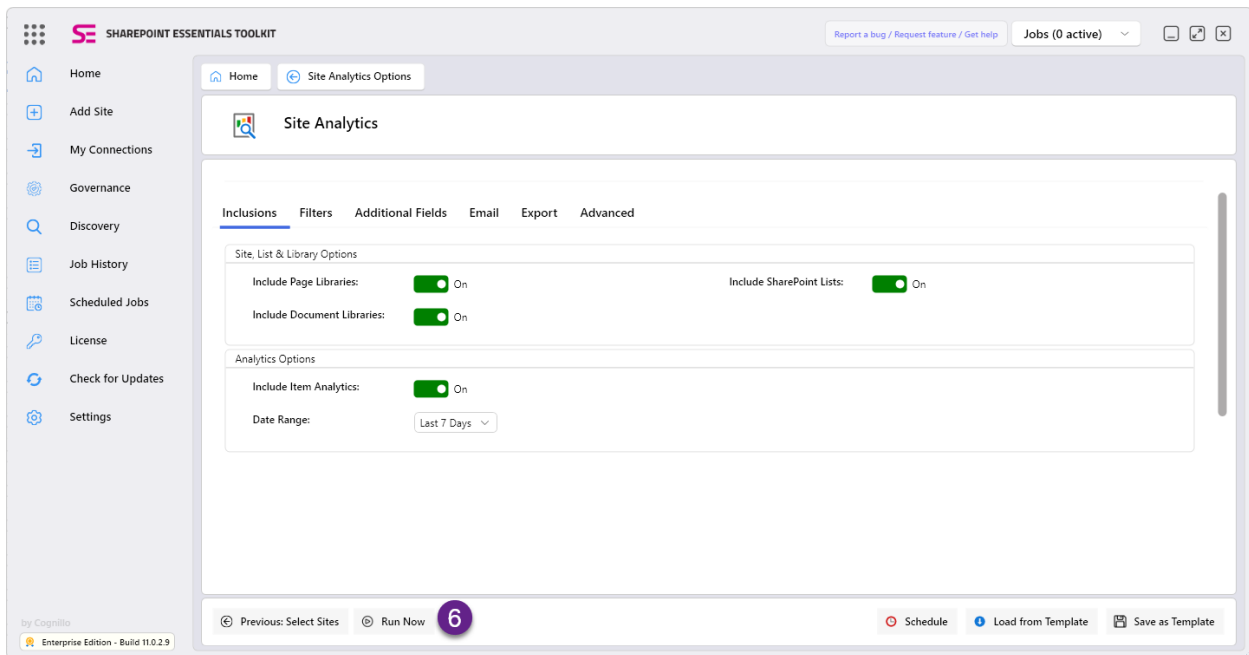
2. Click Site Analytics.





by Cognillo
Enterprise Edition - Build 11.0.2.9

3. Verify the correct site(s) and list(s) are shown. Optionally click Edit to change the Job Name, Selected Sites, or Selected Lists.
4. Click Next: Options.
5. For now, use the default options.
 - a. See the User Guide for detailed descriptions of each available option.
 - b. See below for setting up Content Filtering (Enterprise only) to limit the job to specific items.
6. Click Run Now.

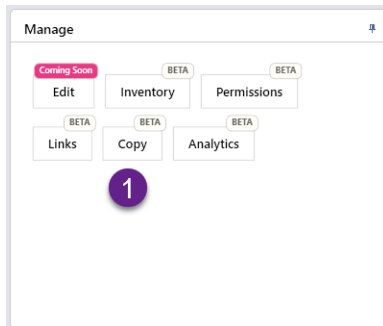


by Cognillo
Enterprise Edition - Build 11.0.2.9

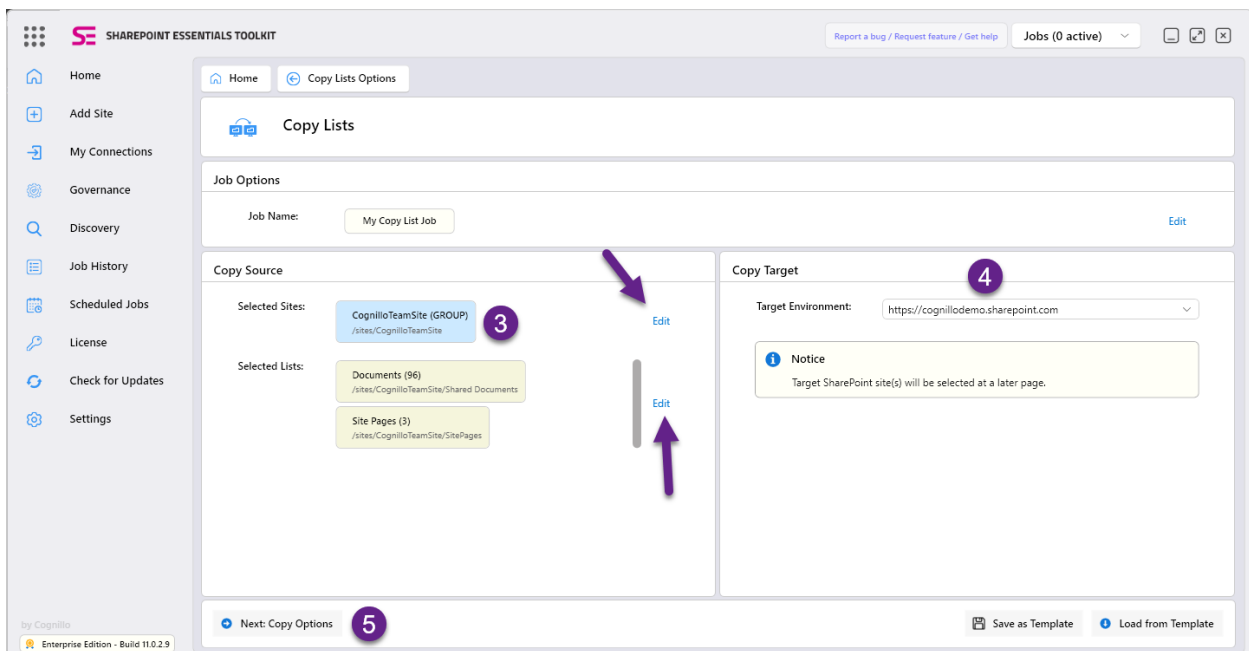
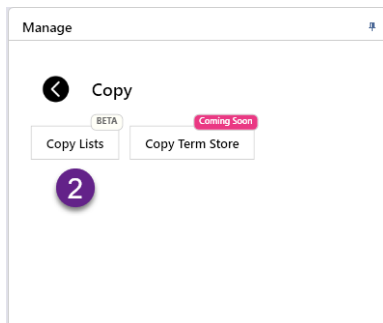
7. A variety of charts and tables appear as part of the Analytics Report. It will be updated in real time as the Analytics job is running.
8. See Working with Reports below.

Run Your First Copy Job

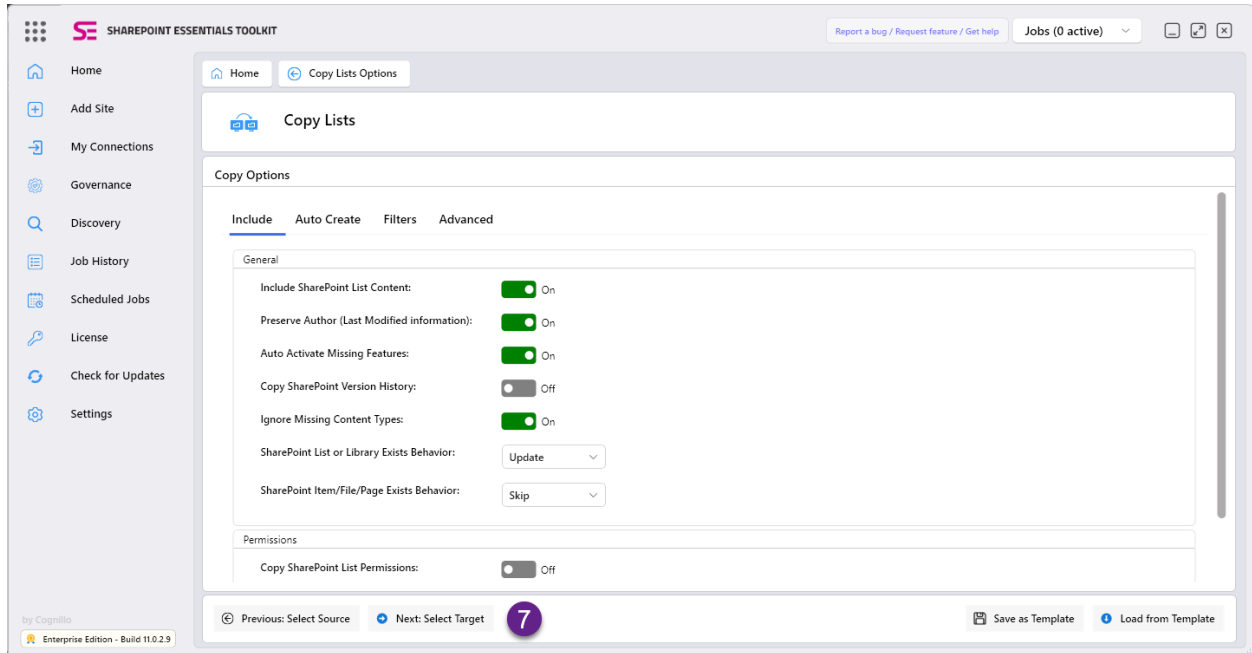
1. After selecting sites/lists from the Home Page Dashboard and Live Explorer, in the Manage panel, click Copy.



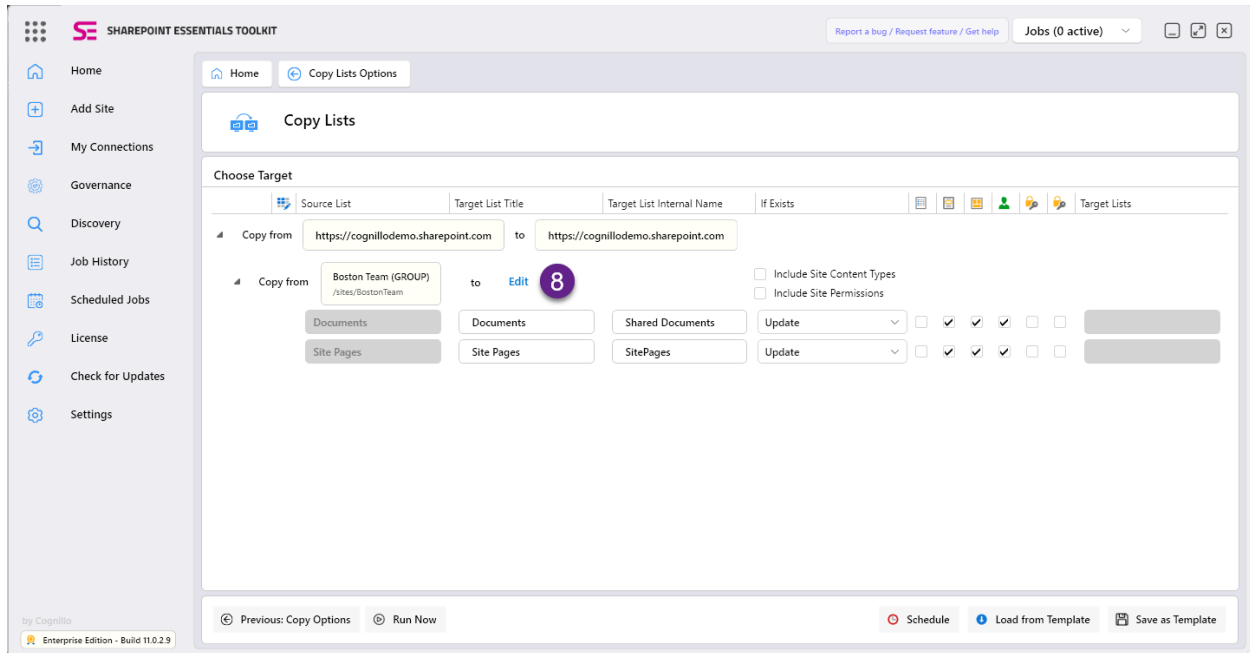
2. Click Copy Lists.



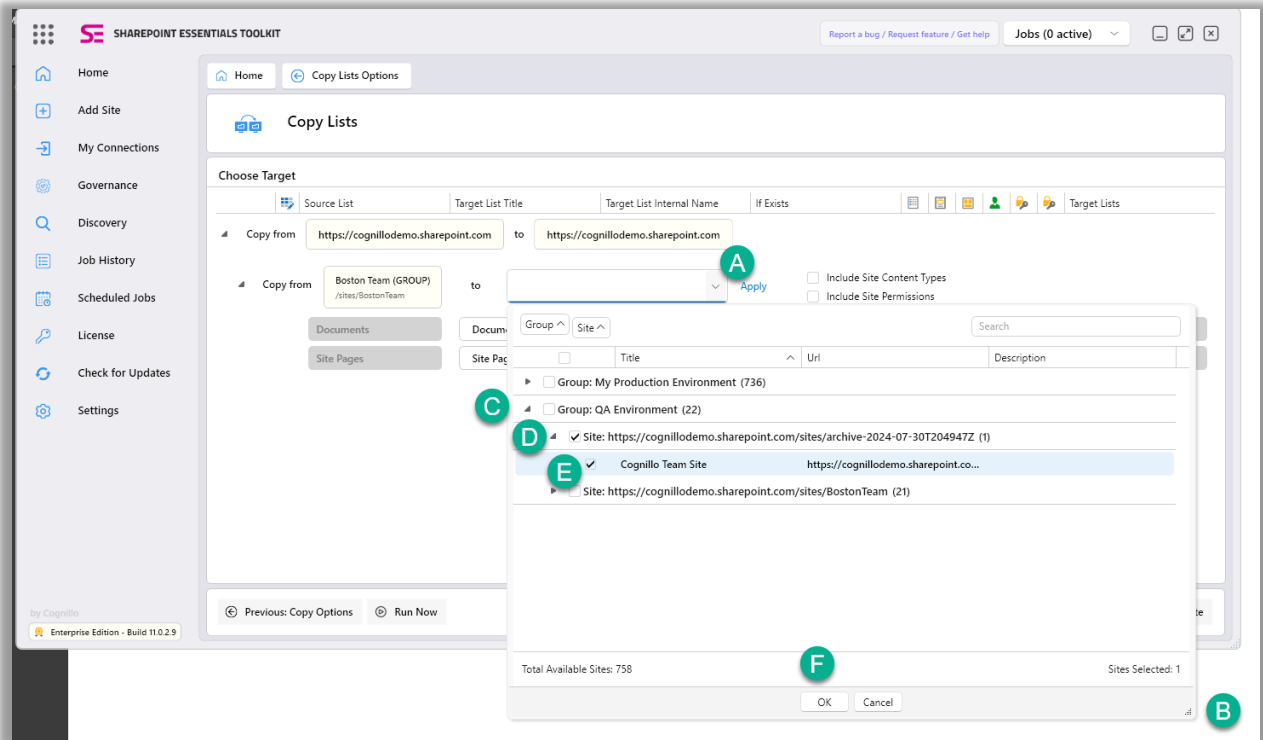
3. Verify the correct site(s) and list(s) are shown. Optionally click Edit to change the Job Name, Selected Sites, or Selected Lists.
4. Choose the Target Environment.
5. Click Next: Copy Options.
6. For now, use the default options.
 - a. See the User Guide for detailed descriptions of each available option.
 - b. See below for setting up Content Filtering (Enterprise only) to limit the job to specific items.
7. Click Next: Select Target.



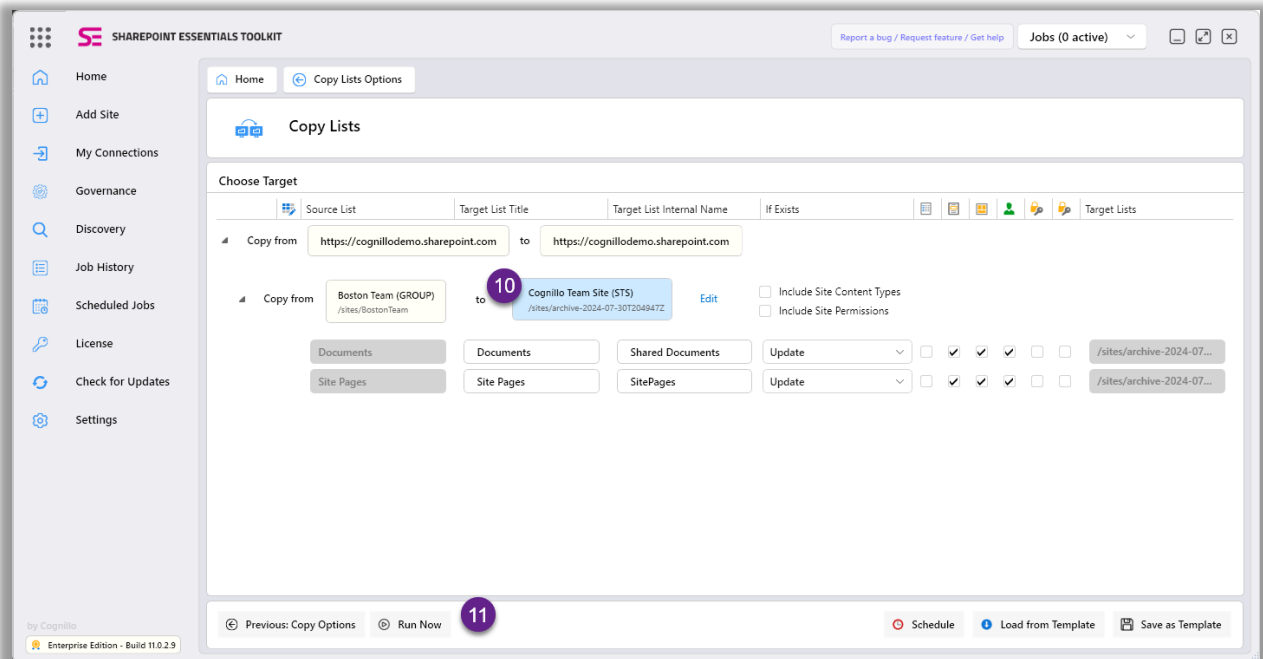
8. Click Edit to the right of the label “Copy from”.



9. Choose one or more target lists.
 - a. Click the triangle to expand the drop down.
 - b. Optionally click-and-drag the triangle on the bottom right of the popup to expand the popup.
 - c. Click the triangle beside a Group name to view the sites in that group.
 - d. Click the triangle beside a Site name to view the lists in that group.
 - e. Check one or more lists.
 - f. Click OK



10. The selected list(s) appear beside the label “to”.



11. Click Run Now.

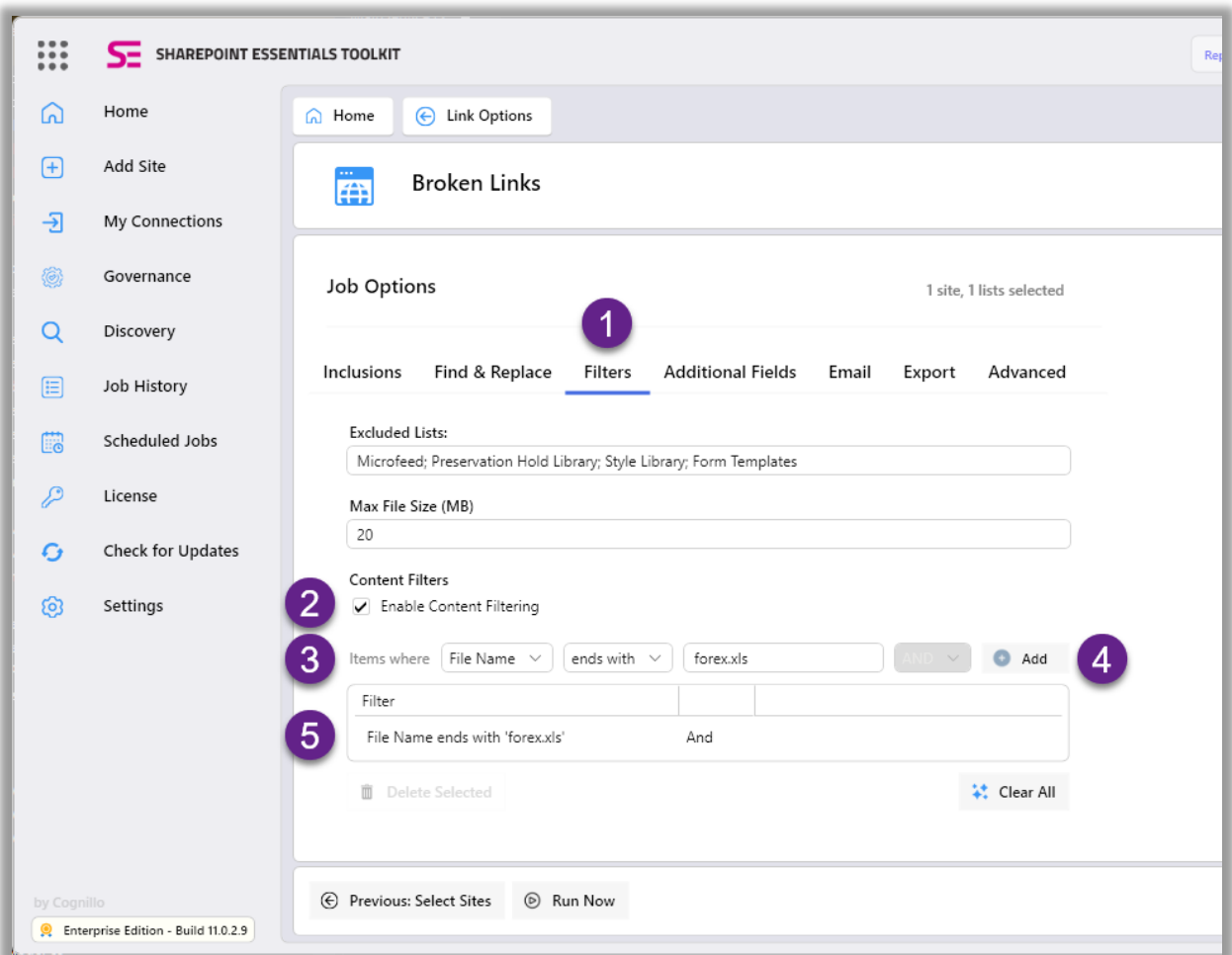
12. The Copy Lists Report will appear. It will be updated in real time as the job is running.

13. See Working with Reports below.

Configure Content Filtering (Enterprise only)

Content Filtering is a powerful tool for running a job against specific items in a site or list. This enables you to produce focused report results and to optimize your efficiency.

To set up Content Filtering (for any job type where it is applicable):

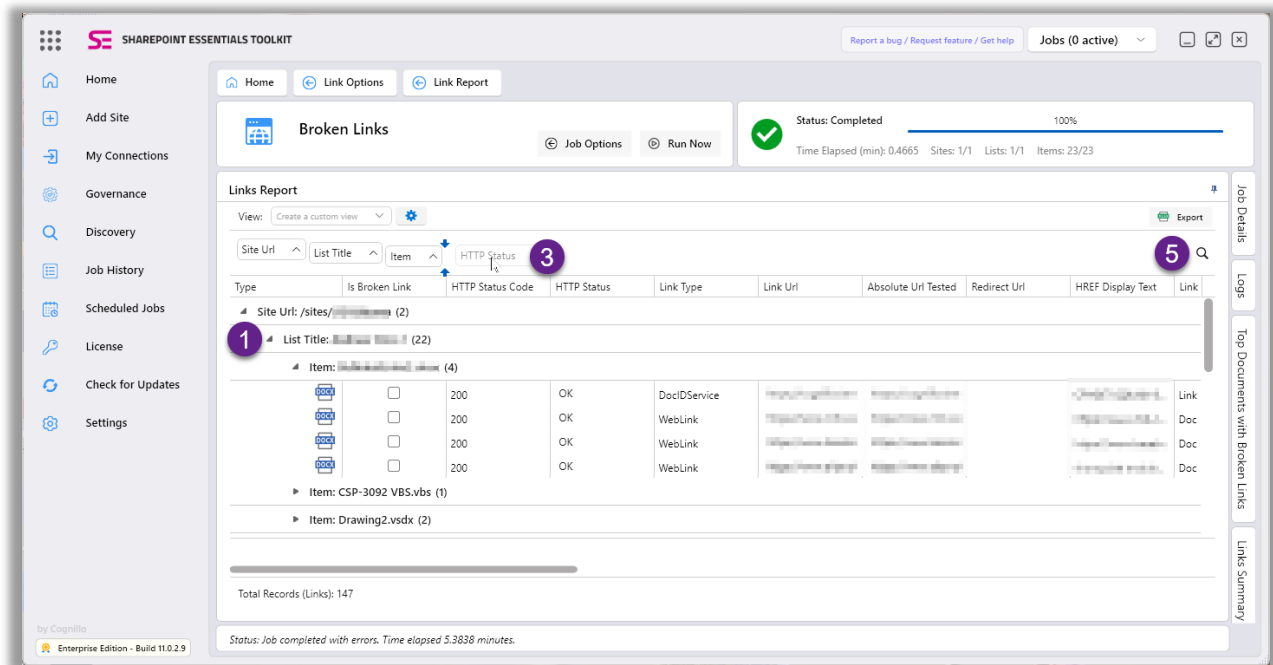


1. Click the Filters tab (only enabled in Enterprise). If Content Filtering is not available, skip to step 11.
2. Ensure Enable Content Filtering is Checked.
3. To limit the report to a specific item, add a Content Filter as shown below.
4. Click Add.
5. The filter appears in the table below.

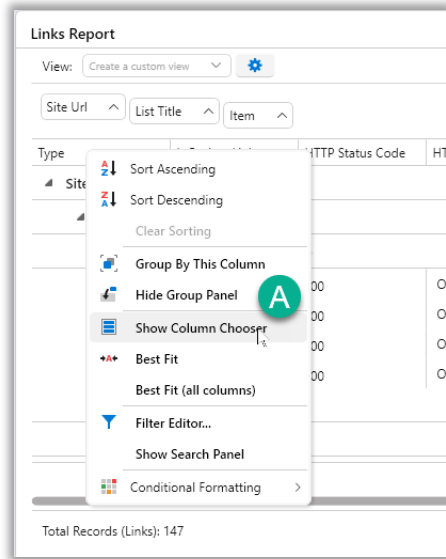
Working with Reports

Table-based Reports

The screenshots below are for link reports but apply to table-based reports for all job types.



1. In the main report panel (i.e. Links Report in the image above), click the triangle beside a site name to expand its content.
2. Continue to expand nodes until you get to individual table rows.
3. The report data is grouped using the Grouping Row above the table headers.
 - a. Click any Grouping Field to change it.
 - b. To rearrange groupings, drag-and-drop the Grouping Fields into the desired order.
 - c. To add groupings, drag-and-drop a table header into the Grouping Row,
 - d. To remove a grouping, drag-and-drop the Grouping Field out of the Grouping Row (#3 in diagram).
4. The report data is shown as table rows.
 - a. To add columns to the table, right-click any table heading and choose “Show Column Chooser” in the context menu.



- b. To filter by a column, hover the pointer over a table header, and a filter icon will appear. Click the filter icon. A context menu will appear with a variety of filtering options.
 - c. To sort data, click any table header. Click it again to reverse the sort order.
 - d. To rearrange columns, drag-and-drop column headers into the desired order.
5. To find specific rows, click the magnifying glass icon on the far right in the Grouping Row.