



DocAve[®]

Governance Automation

Service Pack 2

User Guide

For Business Users

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Table of Contents

- Table of Contents 2
- About DocAve Governance Automation..... 3
- Submitting Documentation Feedback to AvePoint 4
- Getting Started..... 5
 - Understanding Service Requests and Tasks..... 5
 - Familiarizing Yourself With The Interface..... 6
- Starting a Request..... 7
- Managing Your Requests 8
 - Submitted Requests..... 8
 - Saved Requests 9
- Tasks..... 11
 - Managing Your Tasks 11
- Site Collection Directory 14
- Monitoring and Reporting 16
 - Monitoring 16
 - All Requests..... 16
 - All Tasks..... 17
 - GA Auditing Reports..... 17
 - Administrator Activity Report 18
 - Service Request Report..... 18
 - Approval Process Report..... 19
- Administration Reports..... 20
 - Site Collection Report 20
 - Site Report 21
- Index..... 23
- Notices and Copyright Information 24

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 Administrator](#) for right directions.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. Click the following URL to access the **Submit Your Feedback** form on our Web site:

<http://www.avepoint.com/resources/documentation-feedback/?flush=1>

Getting Started

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

Understanding Service Requests and Tasks

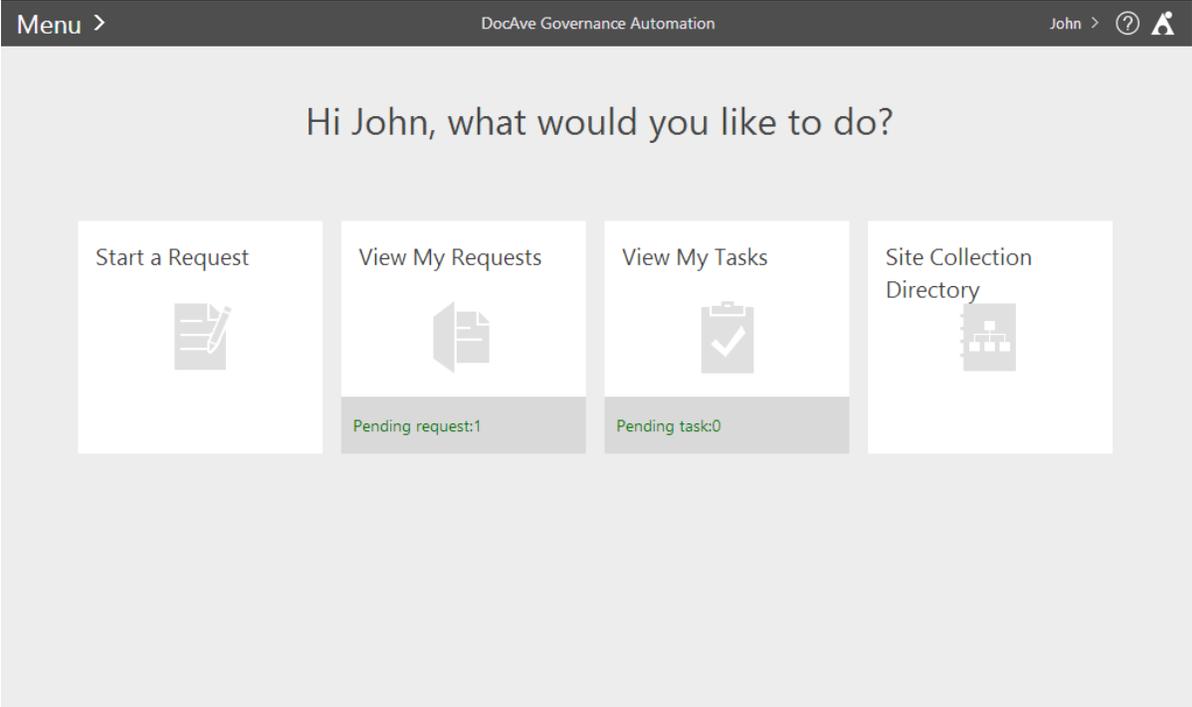
Your SharePoint administrator can create Services which contain a set of configured settings for SharePoint operations that comply with your organization's rules and standards. These Services are tailored to the needs of different departments and purposes within your organization. As a business user, 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 person(s) 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.

***Note:** Service that require users to input URLs are always displayed in your service catalogs. Depending on the settings associated to the URL you input, the request may or may not be able to be completed.

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

In the Start a Request interface, select a Service by clicking the Service name. Enter the necessary information as indicated in the Service Request. Click **Save** to save for later, 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.

Managing Your Requests

In My Requests, all of your Service Requests are displayed including Submitted Requests which are still awaiting approval and Saved Requests which 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

In Submitted Requests, all of the Requests submitted by you are displayed here. You may change the number of Submitted Requests displayed per page, as well the order they are displayed in. 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 the 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 – Allow you to filter Service Requests displayed by the keyword you designate. The Service Request column, the Service column and the Assign To column support to search for the desired Service Requests, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  of the column you want to filter, and then check the checkbox next to the item name to have that item shown in the list.

You can perform the following actions in Submitted Requests:

- View Details – Click on a request name to see detailed 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 which you wish to cancel and click **Cancel Request** on the ribbon.

Saved Requests

In Saved Requests, all of the Requests saved by you without submitting are displayed here. You may change the number of Saved Requests displayed per page, as well the order they are displayed in. 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 – Allow you to filter Service Requests displayed by the keyword you designate. The Service Request column, and the Service column support to search for the desired Service Requests, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  of the column you want to filter, and then check the checkbox next to the item name to have that item shown in the list.

You can perform the following actions to Saved Requests:

- View Details – Click on a request name to see detailed 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 completing the configurations, click **Save** to save all of the settings, 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.
- Delete – Select a request by clicking before a service request name, and click **Delete** on the ribbon. A confirmation window will pop up for this deletion. 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, 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.
-

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 My Tasks, all of the Tasks assigned to you are displayed here. You may change the number of Tasks displayed per page, as well the order they are displayed in. 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– Allow you to filter Tasks displayed by the keyword you designate. The Title and Requester column support to search for the desired Tasks, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  of the column you want to filter, then check the checkbox next to the item name to have that item shown in the list.

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 on a task name to see detailed information. 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.

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

- View Task – Click on 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.

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.

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.

You can perform the following actions on the tasks from Change Site Collection Contact, Change Site Collection Metadata, Change Site Contact, Change Site Metadata, Content Move 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.

Site Collection Directory

Site Collection Directory allows business users to view the information of the published site collections created and managed by Governance Automation. Site Collections with the GA_Published metadata are considered as published site collections. For more information about GA_Published metadata, see the [Metadata](#) section of the [DocAve Governance Automation User Guide for Administrator](#).

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

You may change the number of the directory reports displayed per page, as well the order they are displayed in. To change the number of the 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**, **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** – Allow you to filter the directory reports displayed by the keyword you designate. The URL, Title, Description, Primary Site Collection Administrator, Secondary Site Collection Administrator, Primary Site Collection Contact, Secondary Site Collection Contact, and metadata column support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  in the column heading you want to filter, then check the checkbox next to the item name to have that item shown in the list.

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. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones. Then click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. In the pop-up window, choose to export the report to a local path or an export location to store the report. 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. Then select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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

Monitoring and Reporting allows select business users to help keep track of all requests and tasks created by and assigned to any user, review Governance Automation processes, and gauge the current state of sites and site collections created by Governance Automation.

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

Monitoring

Monitoring allows you to view detailed information for all requests and tasks.

All Requests

All Requests centralize all of the submitted service requests created by any users, providing you with one interface monitor all of the requests.

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

You may change the number of requests displayed per page, as well the order they are displayed in. 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** to select **Ascending** or **Descending**.

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

- **Search** – Allow you to filter service requests displayed by the keyword you designate. The Service Request column, the Service column and the Assign To column support to search for the desired service requests, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  of the column you want to filter, then check 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.

All Tasks

All Tasks centralize all of the tasks assigned to any users, providing you with one interface to monitor all tasks.

To access All Tasks, or in the Monitoring and Reporting page, click **All Tasks**. Click **Back** to close the All Tasks interface.

You may change the number of tasks displayed per page, as well the order they are displayed in. 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** – Allow you to filter tasks displayed by the keyword you designate. The Requester column and the Assign To column support to search for the desired tasks, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  of the column you want to filter, then check 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.

GA Auditing Reports

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

- **Administrator Activity Report** – Provides detailed information on all actions performed by Governance Automation administrators. Administrator Activity Report allows you to inspect the behaviors done by administrators when errors occur for furnishing useful information, or check the legality of administrator behaviors.
- **Service Request Report** – Provides detailed information for all of the submitted service requests. Service Request Report gives you overall usage information of service requests, which you can gather for IT chargeback and budgeting.
- **Approval Process Report** – Provides all of the processing tracks of the approval processes for the service request once they are approved. Approval Process Report allows you to view the

detailed information of service requests for reviewing the performances, which can help you optimize your service request flow and make the processes more efficient.

Administrator Activity Report

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

You can change the number of reports displayed per page, as well the order they are displayed in. 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 – Allow you to filter reports displayed by the keyword you designate. The User and Object Instance Name column support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  in the column heading you want to filter, then check the checkbox next to the item name to have that item shown in the list.

Click **Set Filter** on the ribbon to customize the report. You can set filters for **Object**, **Type**, **Action**, **Time Range** and **User**. To clear the filters click **Reset**. Then click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. In the pop-up window, select a **Report Export Location** to store the report from the drop-down menu, or click **Add new location** to redirect to the Report Export Location interface to create a new one. Then select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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

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

You can change the number of reports displayed per page, as well the order they are displayed in. 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** – Allow you to filter reports displayed by the keyword you designate. The Service Name, Service Request Name, Requester and Assign To column support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  in the column heading you want to filter, then check the checkbox next to the item name to have that item shown in the list.

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**. To set new filter rules, click **Reset**. Then click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. In the pop-up window, select a **Report Export Location** to store the report from the drop-down menu, or click **Add new location** to redirect to the Report Export Location interface to create a new one. Then select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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

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.

You can change the number of reports displayed per page, as well the order they are displayed in. 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 – Allow you to filter reports displayed by the keyword you designate. The Service Request Name and User column support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  in the column heading you want to filter, then check the checkbox next to the item name to have that item shown in the list.

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**. To set new filter rules, click **Reset**. Then click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. In the pop-up window, select a **Report Export Location** to export the report to storage. In the pop-up window, choose to export the report to a local path or an export location to store the report. 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. Then select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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 their details including 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 – Provide a list of sites created by Governance Automation along with their details including 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

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

You can change the number of reports displayed per page, as well the order they are displayed in. 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, 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** – Allow you to filter reports displayed by the keyword you designate. The URL, Title, Description, Primary Site Collection Administrator, Secondary Site Collection Administrator, Primary Site Contact, Secondary Site Collection Contact, and metadata column support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  in the column heading you want to filter, then check the checkbox next to the item name to have that item shown in the list.

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. To set new filter rules, click **Reset**. Then click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. In the pop-up window, select a **Report Export Location** to store the report from the drop-down menu, or click **Add new location** to redirect to the Report Export Location interface to create a new one. Then select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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

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

You can change the number of reports displayed per page, as well the order they are displayed in. 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** – Allow you to filter reports displayed by the keyword you designate. The URL and Title column support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
-  – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click , then check the checkbox next to the column name to have that column shown in the list.
-  – This allows you to filter which item in the list is displayed. Click the  in the column heading you want to filter, then check the checkbox next to the item name to have that item shown in the list.

Click **Set Filter** on the ribbon to customize the report. You can set filters for **URL** and **Site Template**, **Department**, and **Primary Site Contact**. To set new filter rules, click **Reset**. Then click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. In the pop-up window, select a **Report Export Location** to store the report from the drop-down menu, or click **Add new location** to redirect to the **Report Export Location** interface to create a new one. Then select either **CSV** or **XLS** as the report format from the drop-down menu in the **Report Format** section. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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

Index

Add new, 14, 17, 18, 19
Administrator Activity Report, 17
All Requests, 15
All Tasks, 16
Approval Process History Report, 17
Approve, 11
Archive, 13
Back, 15, 16, 17, 18
Cancel, 6, 8, 9, 11, 13, 14, 17, 18, 19
Cancel Request, 8
Close, 7, 11, 13, 16
Complete, 11, 13
Continue Access, 13
Copy, 7, 9
Create, 9
CSV, 14, 17, 18
Delete, 9, 13
Edit, 9
Export to Datasheet, 14, 17, 18
Generate Report, 14, 17, 18
My Request, 7
My Tasks, 11
OK, 9, 11, 13, 14, 17, 18, 19
Reject, 11
Report Export Location, 14, 17, 18, 19
Save, 6, 7, 9
Save and Submit, 6, 8, 9
Saved Requests, 7
Service Request Report, 17
Site Collection Report, 18
Site Report, 18
Start a Request, 6
Submit, 9
Submitted Requests, 7
View Details, 7, 9, 16
View Task, 11, 13
XLS, 14, 17, 18

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