

SharePoint Essentials Toolkit

2027 Release

Getting Started

Last updated Oct 5th 2026

Contents

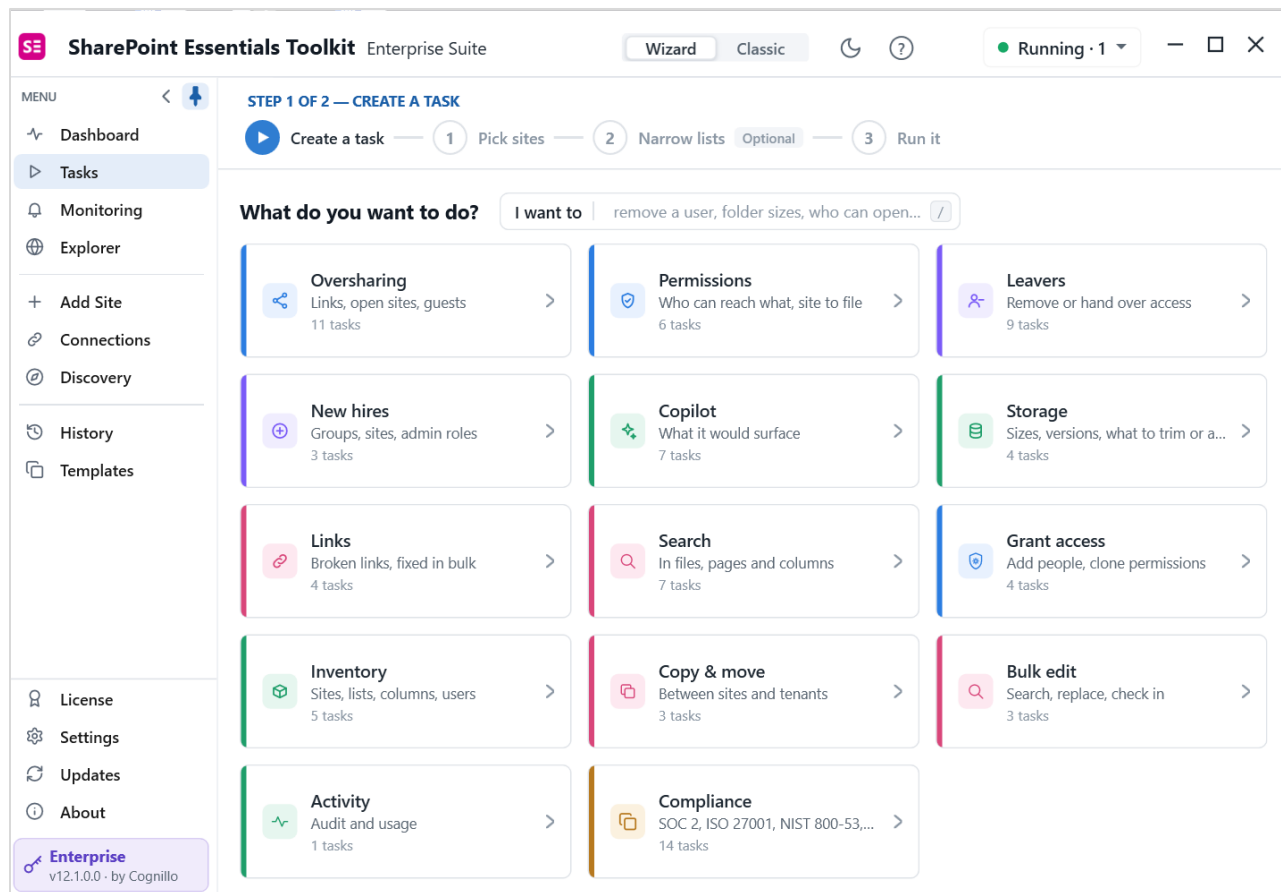
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SharePoint Essentials Toolkit Overview

SharePoint Essentials Toolkit is a Windows desktop application for SharePoint Online and SharePoint Server administrators, site collection administrators and site owners. It builds reports across one or many sites and lets you fix what the reports find, in bulk, from the report itself.

Every job in the toolkit follows the same three steps: **pick a task**, **pick sites**, **run it**. Reports are saved to History, can be exported to Excel or SharePoint, emailed, scheduled, or turned into a monitor that runs on its own and alerts you when something changes.



The Tasks page. Choose an area, then a task; the wizard walks you through sites, lists and options.

What is new in the 2027 release

The 2027 release (version 12) is a redesign of the application around tasks and outcomes.

Highlights:

- **Tasks wizard and 'I want to' search** - describe what you need (for example 'folder sizes' or 'who can open HR') and the matching task is suggested. A Classic three-panel layout is still available.
- **Dashboard and Monitoring** - turn any report into a monitor that runs daily, weekly or monthly, keeps every run, compares it with the last run and emails you when something new appears.
- **Oversharing and Copilot readiness** - sharing links report, sites and content open to everyone, unlabeled files that are widely shared, stale content still open to everyone.
- **Fix from the report** - remove or downgrade sharing links, set or shorten link expiry, remove a person from a link, reset unique permissions to inherited, remove direct permissions, apply sensitivity labels and send files to Microsoft 365 Archive - all from the report grid with a change log in History.
- **Leavers and new hires** - everything one person can access, remove a person from everything, replace one user with another, copy access from a colleague, add a person to groups and sites.
- **Explorer** - browse every site the connection can see, with list and item counts, storage, owners and permissions, and start a report from any site.
- **Discovery saved searches** - a task can run against 'all team sites', 'sites created in the last 90 days' or any URL pattern instead of a fixed list, so new sites are included automatically.
- **Compliance packs** - tasks grouped by SOC 2, ISO 27001, NIST 800-53 and CMMC controls.
- **Light, dark and match-Windows themes**, larger text sizes, and a new Settings page with search.

Feature areas at a glance

The table below lists each area in the Tasks page, what it is for, and the most-used tasks in it.

Area	What it is for	Key tasks
Permissions	See who can access what, from site to file	Permissions report; Who has Full Control; Everything one person can access; Everything guests can reach; Sharing links report; Users and groups on each site
Oversharing	Find and fix oversharing	Sharing links report; Sites and content open to everyone; Unlabeled files that are widely shared; Stale content still open to everyone; Remove or downgrade links; Set or shorten link expiry; Reset unique permissions in bulk
Copilot	Get ready for Copilot - what it would surface	Same reports as Oversharing plus Files, folders and pages inventory with sensitivity label columns

Area	What it is for	Key tasks
Leavers	Clean up after a leaver	Everything one person can access; Remove a person from everything; Replace one user with another; Files checked out to them; Clean up orphaned users
New hires / Grant access	Give people access quickly	Add a person to groups and sites; Copy access from a colleague (clone permissions); Add or replace site collection administrators
Links	Keep links working	Find broken links; Link inventory; Find one or more specific links; Fix or replace links in bulk (pages, navigation, web parts and Office documents)
Search	Find or replace text	Text in file contents; Text on pages and in web parts; Text in columns and metadata; Replace text in each of these; Get checked out files
Inventory	Take inventory	Sites and lists; Items, files, folders and pages; Users; Content types; Fields and columns
Storage	Reclaim storage	Site and list sizes; Largest files and version history; Trim version history in bulk; Send files to Microsoft 365 Archive
Copy and move	Copy, move or create	Copy lists (with version history and permissions, one-to-many and many-to-one); Create sites in bulk
Bulk edit	Search, replace and check in	Bulk item actions from any item report: check in, discard checkout, apply or remove labels, replace text
Activity	See who did what	User activity from the Microsoft 365 audit log: access, downloads, deletions, sharing, permission changes
Compliance	Evidence for an audit	Permissions, inventory and audit-log tasks grouped by SOC 2, ISO 27001, NIST 800-53 and CMMC control
Monitoring	Keep watching	Any report on a schedule, compared run over run, with email alerts and run summaries; Dashboard cards; 'What needs attention' insights

Feature list

A fuller list, grouped the same way as the product page at <https://cognillo.com/sharepoint-essentials-toolkit>. Availability differs by edition (Community, Professional, Enterprise); see the feature comparison on that page for details.

Permissions management and compliance

- Permissions report (who can access what) with report presets: Accounts with Direct Access, Accounts with Full Control, Access via Sharing Links, Open to Everyone, Item Level Permissions, Site Group Member Counts and more
- Includes SharePoint group members, Teams owners and members, and Entra ID (Azure AD) group members including nested groups (app registration required)
- Everything one person can access (check user permissions); Replace one user with another; Copy access from a colleague
- Add a person to groups and sites; Remove a person from everything; Clean up orphaned users
- Add, remove or replace site collection administrators
- Fix permissions and sharing links from reports, with undo of permission changes
- Inclusion and exclusion rules and content filtering on every report

Oversharing and Copilot readiness

- Sharing links report; Sites and content open to everyone; Privileged access inventory (who has Full Control)
- Unlabeled files that are widely shared; Stale content still open to everyone
- Remove or downgrade sharing links; Set, shorten or extend link expiry; Remove a person from a sharing link
- Reset unique permissions to inherited (bulk); Apply sensitivity labels in bulk from a report
- Oversharing monitor with email alerts

Broken links management

- Broken link reports; Inventory of all links; Find specific links; Links summary and top broken links
- Links inside Office documents, modern pages, web parts and site navigation
- Find and replace links (wildcards supported); Broken links monitor

Content management

- Search inside file contents (Word, Excel, PowerPoint, PDF, text); Search pages and web parts; Search columns and metadata
- Find and replace text in files, pages, web parts and columns, with preview before changes are made
- Checked out files report with check in or discard in bulk
- Copy lists with version history, permissions, multiple source lists and multiple target lists
- Bulk create site collections, lists and content; batch edit

Inventory and storage

- Site inventory (features, alerts, sharing settings, storage, recycle bin size); List inventory; Folder and size inventory
- Items, files, folders and pages with sizes, version counts, sensitivity label and sharing columns
- User inventory with Entra ID properties; Content type inventory; Field inventory
- Largest files and version history; Trim version history in bulk; Send files to Microsoft 365 Archive; Storage growth monitor

Governance and analytics

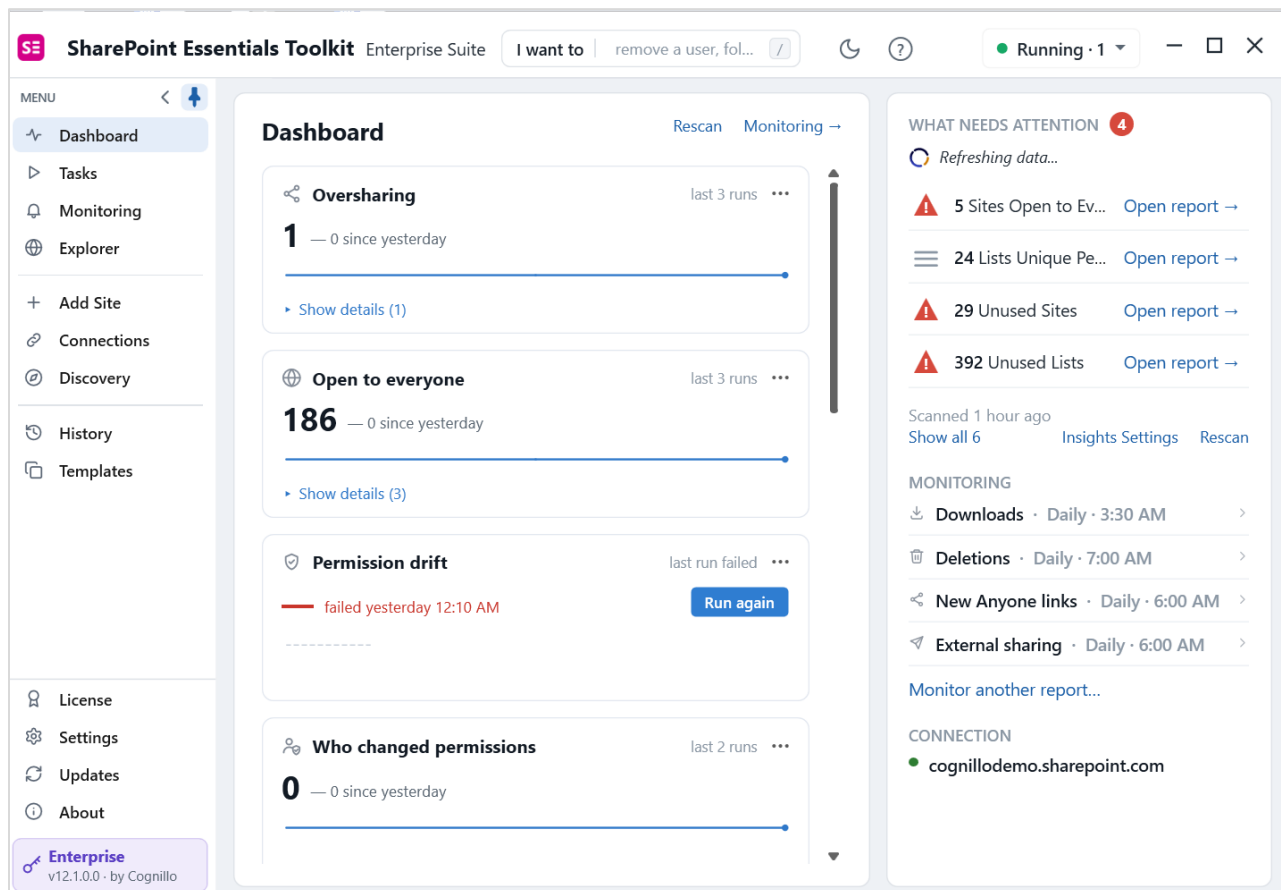
- Monitors (scheduled, compared run over run), Dashboard, alert rules, email alerts and run summaries
- Permission change monitor; User activity reports from the unified audit log
- Site analytics (visits, unique users) and document and page analytics

Report and task automation

- Outcome-based tasks; Explorer; auto-discovery of sites for a task
- Job templates; Job history with change logs, undo and retry
- Scheduler for reports and tasks; PowerShell and command-line execution
- Export to Excel or CSV, export to SharePoint lists, email reports
- Multi-tenant support; SharePoint Online and SharePoint Server (2019, Subscription Edition; 2013 and 2016 with limitations)

The User Interface

The main window has a menu on the left, a title bar with quick actions, and a content area that changes with the page you are on.



The Dashboard with the menu pinned open.

Left menu

Menu item	What it is for
Dashboard	Monitor cards with trend lines, 'What needs attention' insights, the monitoring schedule and the current connection.
Tasks	Where you create and run reports and bulk changes. Wizard and Classic layouts.
Monitoring	All monitors in one list: last run, next run, alert on or off, run now, edit, delete.

Menu item	What it is for
Explorer	Browse every site the connection can see; select a site to view details and start a report.
Add Site	Add sites to the Home list by pasting URLs, importing from Excel or CSV, or searching the tenant.
Connections	Connection profiles: how the toolkit signs in to SharePoint (web browser, certificate, username and password, Windows account).
Discovery	Saved site searches a task can use instead of a fixed list of sites.
History	Every job that has run, with its report, log, settings and change log. Re-run, edit, duplicate, schedule or save as a template.
Templates	Saved job settings that can be run from the UI, on a schedule or from PowerShell.
License, Settings, Updates, About	Activation and license details; application and job settings; update check; version information.

Click the pin icon at the top of the menu to keep it open. Unpinned, the menu collapses to icons and opens as a flyout when you click the menu button.

Title bar

- **I want to** - type what you need; matching tasks are listed as you type. Press **/** from anywhere to focus the box, **Enter** to open the task, **Esc** to close.
- **Theme** - switch between light and dark. Settings > Appearance also offers Match Windows and larger text sizes.
- **Help** - opens the online documentation.
- **Running / Idle** - shows jobs that are running and jobs that finished today. Open a report or dismiss it from here.

SE

SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, fol...

Idle

MENU

Dashboard

Tasks

Monitoring

Explorer

Add Site

Connections

Discovery

History

Templates

License

Settings

Updates

About

Enterprise v12.1.0.0 - by Cognillo

Monitoring / History 83 tasks · 15 need attention

By task By site Sched Search

Title	Task	
+ Downloads	User	Open
+ New Permissions Export COMP \	Perm	Open
+ Deletions	User	Open
+ External sharing	User	Open
+ New Anyone links	Perm	Open
+ Site admin changes	User	Open
+ Downloads	User	Open
+ Who changed permissions	User	Open
+ External sharing	User	Open
+ Downloads	User	Open
+ Deletions	User	Open
+ Downloads	User	Open
+ New Permissions Export COMP \	Perm	Open
+ Site admin changes	User	Open
+ Downloads	User	Open
+ Deletions	User	Open

Total Jobs: 20

Running 0

Nothing is running

Start a task from Tasks, or set one on a schedule from Monitoring.

FINISHED TODAY

Permissions report

Completed · 19:03

1 site · 40 s

1 site

Open Dismiss

Sync Job - 2026-10-04 06-53

Completed · 19:03

92 sites · 10.4 min

92 sites

Open Dismiss

Open History

Finished runs clear after 24 h

Vendor Help and Contacts

/sites/demo-blm/Projects/Pr... · 0.0 min

0 / 0

Willowdale

/sites/Toronto/northyork/will... · 0.0 min

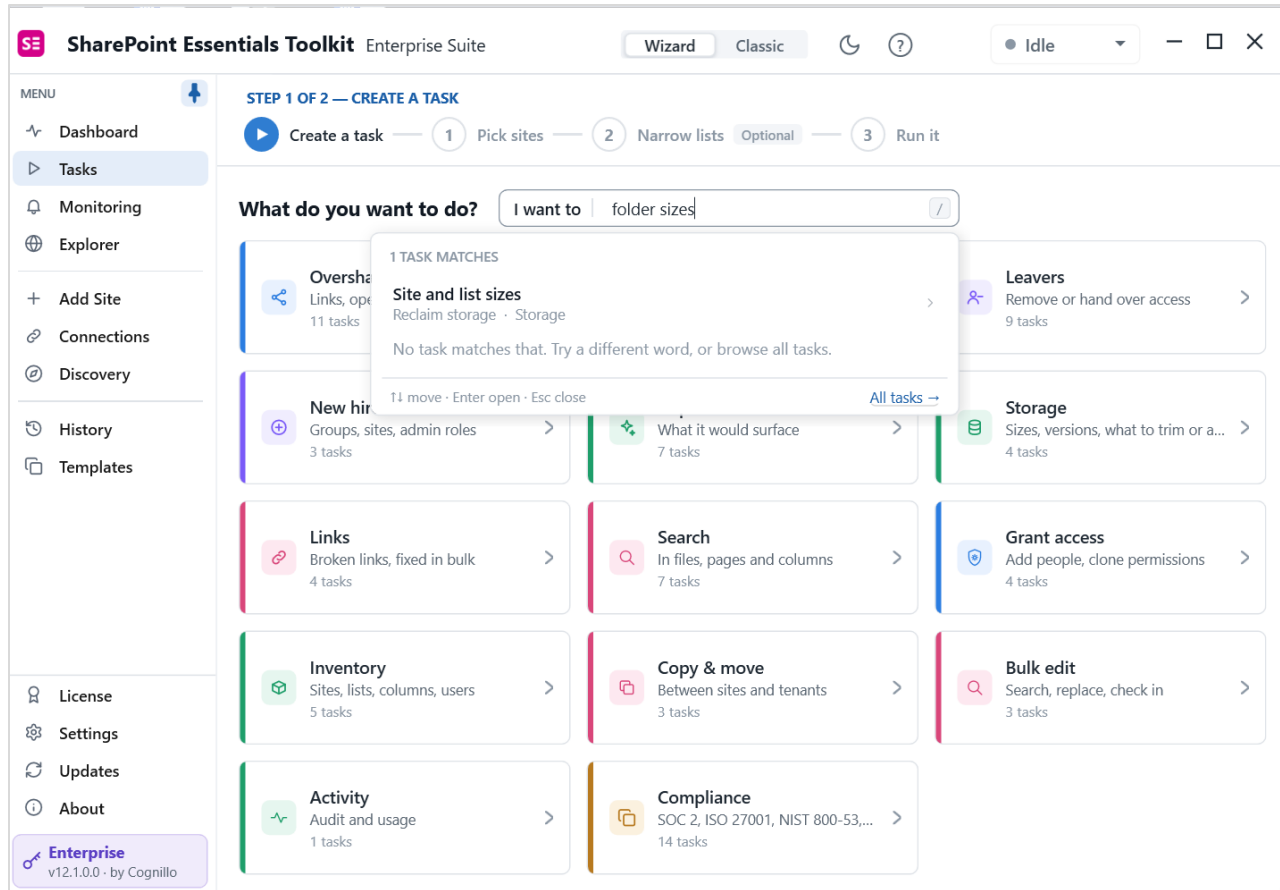
0 / 0

Compass

/sites/BostonTeam/Projects/... · 0.0 min

0 / 0

The Running / Idle drop down lists active jobs and jobs finished today.



'I want to' search suggests the matching task.

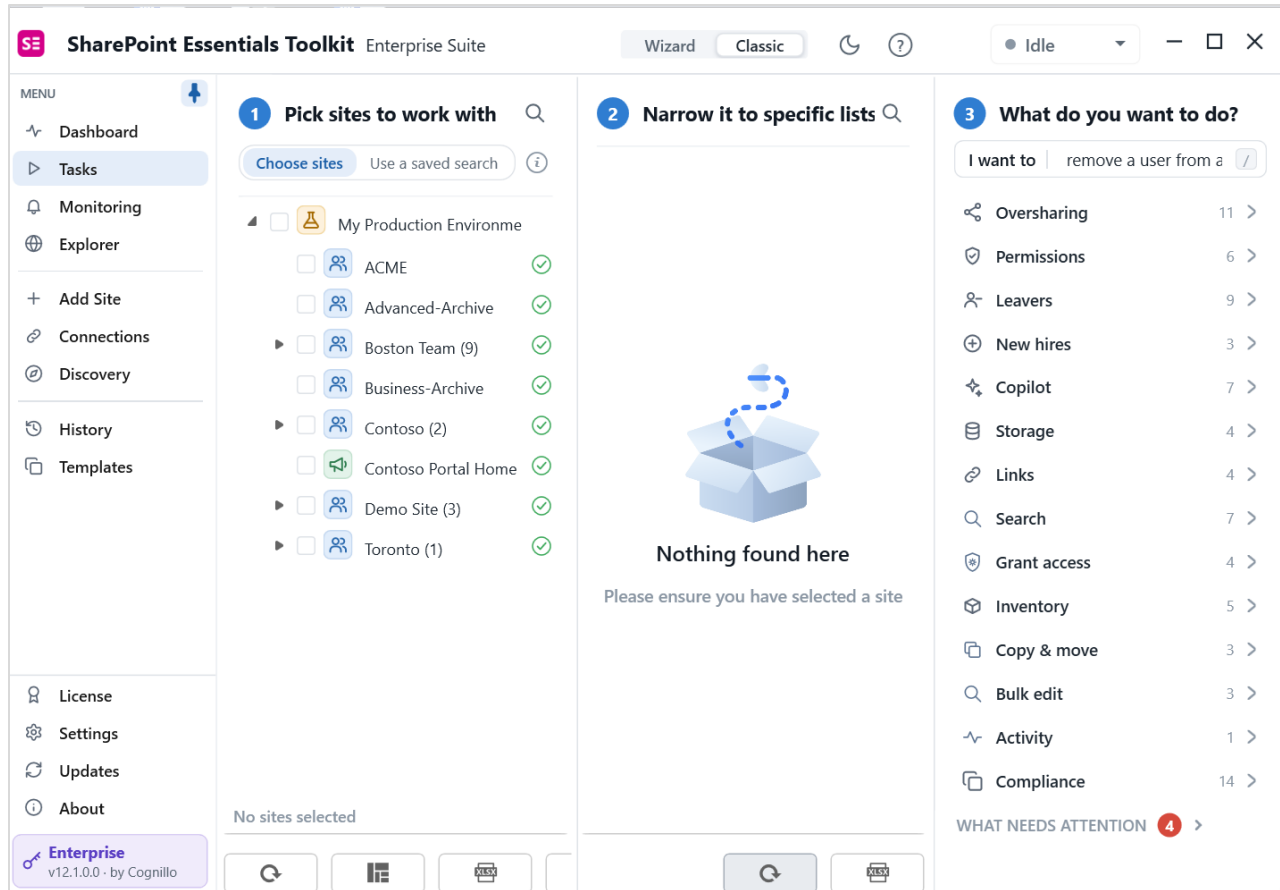
Dashboard

The Dashboard shows one card per monitor with the latest count, the change since the previous run and a trend line for recent runs. Click **Review** to open the latest report or **Show details** for the breakdown.

The right-hand panel lists **What needs attention** (sites open to everyone, lists with unique permissions, unused sites and lists, large lists), the **Monitoring** schedule, and the active **Connection**. Insights are refreshed by the sync job that runs when the application starts; the interval is set under Settings > General > Home.

Tasks: Wizard and Classic

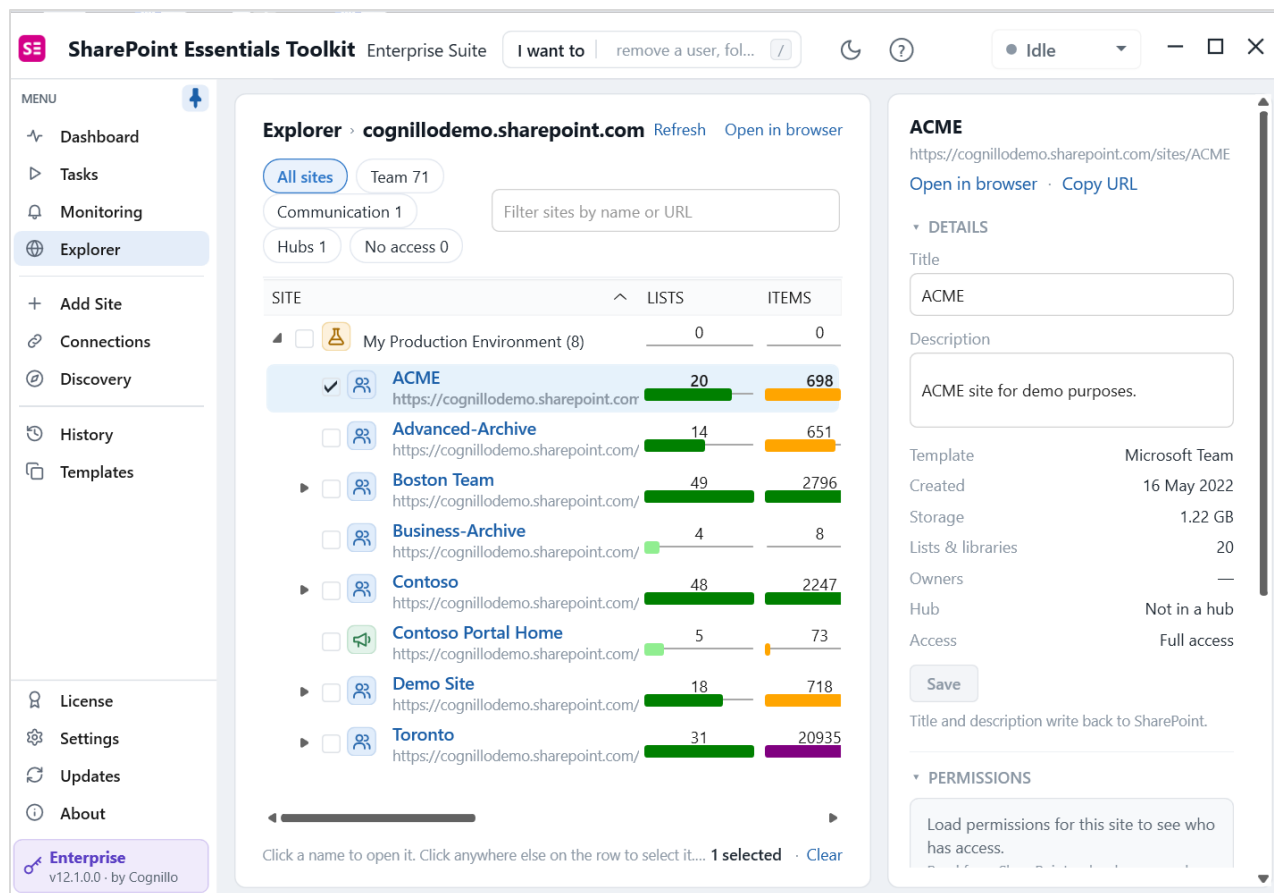
The **Wizard** layout (default) walks through Create a task > Pick sites > Narrow lists (optional) > Run it. The **Classic** layout shows the three panels side by side: sites on the left, lists in the middle and tasks on the right. Switch between them with the toggle in the title bar when you are on the Tasks page.



Classic layout: pick sites, narrow to lists, choose the task.

Explorer

Explorer lists every site the connection can see, grouped by Home group, with list and item counts. Filter by site type (Team, Communication, Hubs, No access) or by name. Select a site to see its details, open it in the browser, edit its title and description, load its permissions, or start a report on it.



The screenshot shows the SharePoint Essentials Toolkit interface. The left sidebar contains a menu with options: Dashboard, Tasks, Monitoring, Explorer (selected), Add Site, Connections, Discovery, History, and Templates. Below the menu are sections for License, Settings, Updates, and About. The main area is titled 'Explorer > cognillodemo.sharepoint.com' and includes filters for 'All sites', 'Team 71', 'Communication 1', 'Hubs 1', and 'No access 0'. A table lists various sites with columns for SITE, LISTS, and ITEMS. The 'ACME' site is selected, and its details are shown on the right, including its URL, title, description, template, creation date, storage size, and permissions.

SITE	LISTS	ITEMS
My Production Environment (8)	0	0
ACME	20	698
Advanced-Archive	14	651
Boston Team	49	2796
Business-Archive	4	8
Contoso	48	2247
Contoso Portal Home	5	73
Demo Site	18	718
Toronto	31	20935

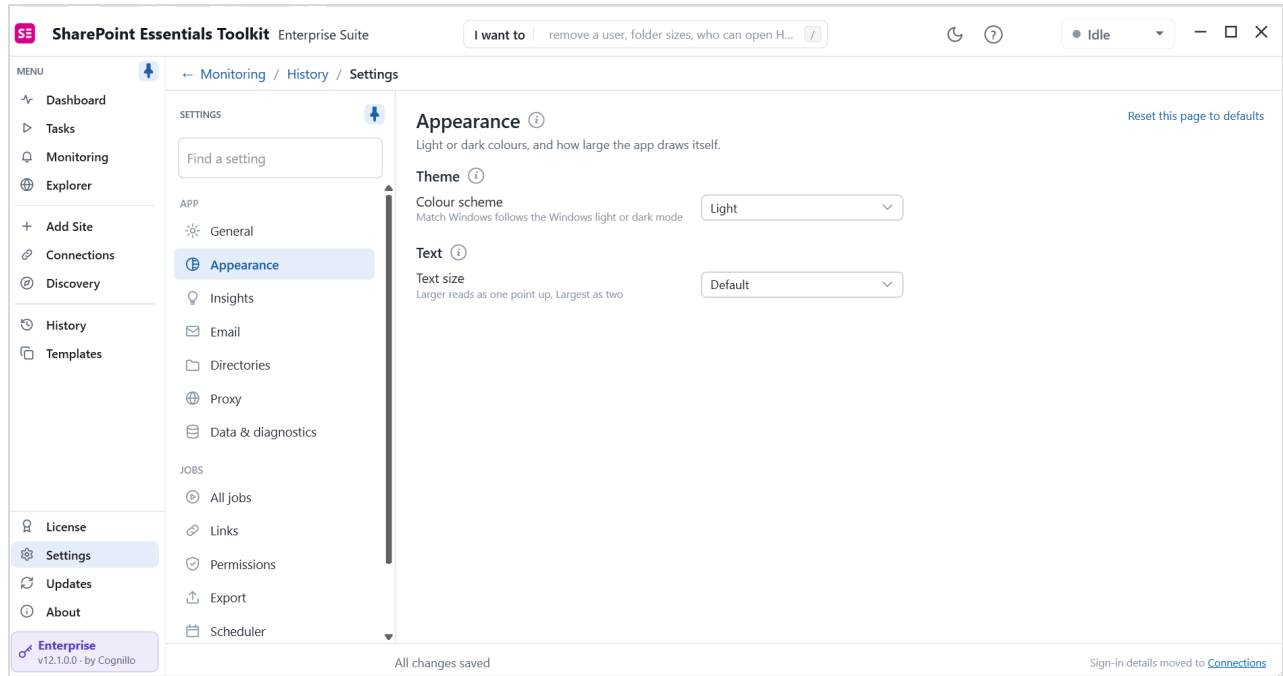
ACME details:

- URL: https://cognillodemo.sharepoint.com/sites/ACME
- Title: ACME
- Description: ACME site for demo purposes.
- Template: Microsoft Team
- Created: 16 May 2022
- Storage: 1.22 GB
- Lists & libraries: 20
- Owners: —
- Hub: Not in a hub
- Access: Full access

Explorer with a site selected.

Settings

Settings are grouped into App (General, Appearance, Insights, Email, Directories, Proxy, Data and diagnostics) and Jobs (All jobs, Links, Permissions, Export, Scheduler and one page per job type). Use **Find a setting** to search across all pages. Changes are saved as you make them; **Reset this page to defaults** undoes a page.



The screenshot shows the SharePoint Essentials Toolkit Enterprise Suite interface. The top bar includes the application name, a search bar with the text "I want to remove a user, folder sizes, who can open H...", and window controls. The left sidebar contains a menu with options like Dashboard, Tasks, Monitoring, Explorer, Add Site, Connections, Discovery, History, Templates, License, Settings (selected), Updates, and About. The main content area is titled "Settings" and shows the "Appearance" section. The "Appearance" section has a sub-header "Theme" and two settings: "Colour scheme" (set to "Light") and "Text size" (set to "Default"). A "Reset this page to defaults" link is visible. The bottom status bar indicates "All changes saved" and "Sign-in details moved to Connections".

SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, folder sizes, who can open H...

MENU

- Dashboard
- Tasks
- Monitoring
- Explorer
- Add Site
- Connections
- Discovery
- History
- Templates
- License
- Settings
- Updates
- About
- Enterprise v12.1.0.0 - by Cognillo

Monitoring / History / Settings

SETTINGS

Find a setting

APP

- General
- Appearance
- Insights
- Email
- Directories
- Proxy
- Data & diagnostics

JOBS

- All jobs
- Links
- Permissions
- Export
- Scheduler

Appearance

Light or dark colours, and how large the app draws itself.

Theme

Colour scheme Match Windows follows the Windows light or dark mode Light

Text

Text size Larger reads as one point up, Largest as two Default

Reset this page to defaults

All changes saved

Sign-in details moved to Connections

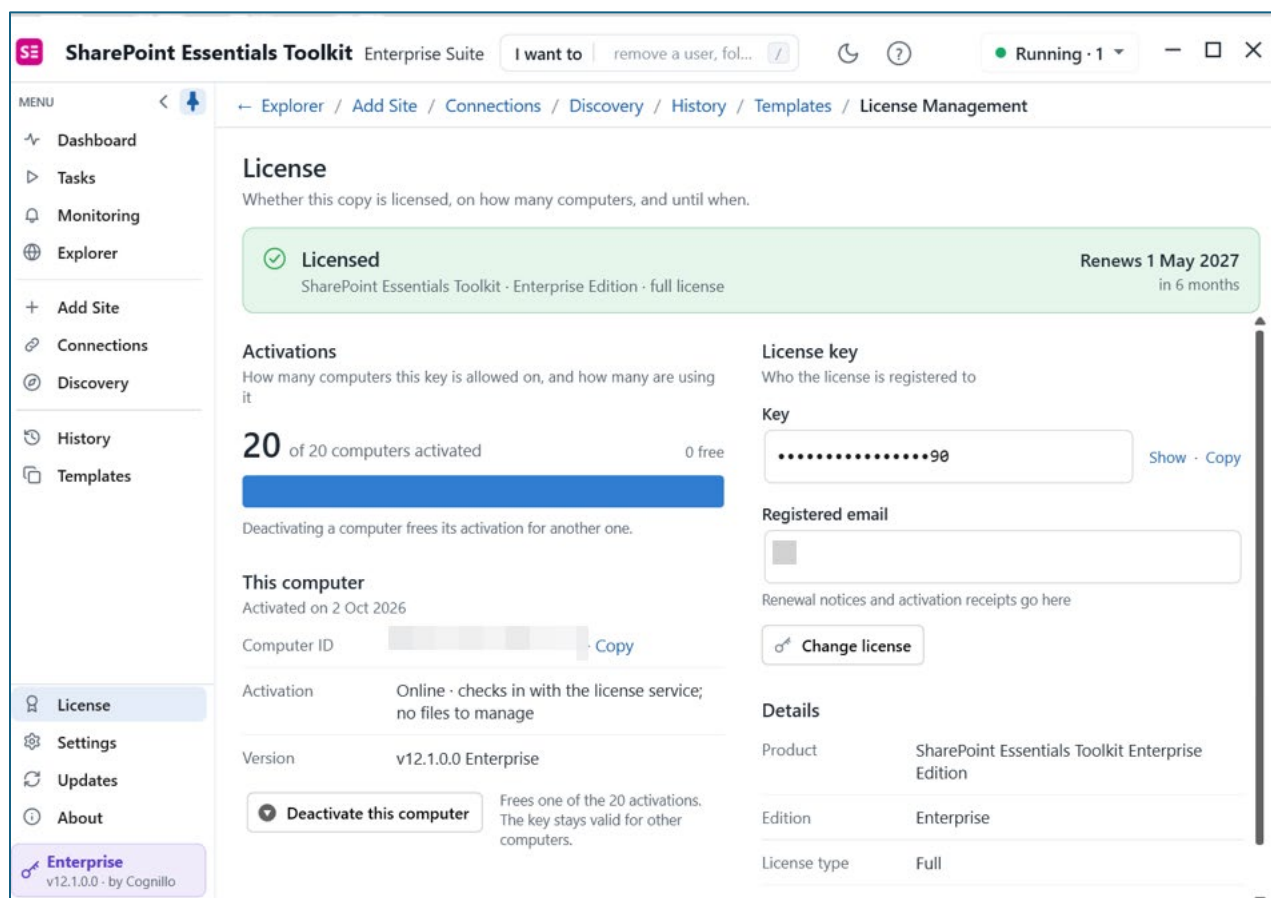
Settings > Appearance: theme and text size.

License Activation

On first start the Home page shows **Set up in three steps**; step 1 is **Enter your license key**. You can also activate or change the license later from **License** in the left menu.

1. Enter the **License key** and the **Registered email** from your sign-up or purchase email. Community Edition keys are issued the same way.
2. Click **Activate**. The toolkit checks in with the Cognillo license service; the card turns green and shows the edition and renewal date.

The registered email does not have to match the purchasing account; it is used for renewal notices and activation receipts.



The screenshot shows the 'License Management' page of the SharePoint Essentials Toolkit Enterprise Suite. The page is titled 'License' and includes a sub-header 'Whether this copy is licensed, on how many computers, and until when.' The main content area is divided into several sections:

- Licensed:** A green banner indicating the software is licensed. It specifies 'SharePoint Essentials Toolkit - Enterprise Edition - full license' and shows a renewal date of '1 May 2027 in 6 months'.
- Activations:** A section showing '20 of 20 computers activated' with a blue progress bar. It includes a note: 'Deactivating a computer frees its activation for another one.'
- This computer:** A section showing the current computer's activation status. It states 'Activated on 2 Oct 2026' and provides a 'Computer ID' with a 'Copy' button. Below this, it shows 'Activation: Online - checks in with the license service; no files to manage' and 'Version: v12.1.0.0 Enterprise'. A 'Deactivate this computer' button is also present, with a tooltip explaining it frees one of the 20 activations.
- License key:** A section showing the license key and the registered email. It includes a 'Show' button and a 'Copy' button for the key.
- Registered email:** A section showing the registered email address and a 'Change license' button.
- Details:** A table showing the product details:

Product	SharePoint Essentials Toolkit Enterprise Edition
Edition	Enterprise
License type	Full

The left sidebar contains a menu with options: Dashboard, Tasks, Monitoring, Explorer, Add Site, Connections, Discovery, History, Templates, License (selected), Settings, Updates, and About. The bottom of the sidebar shows the version 'v12.1.0.0 - by Cognillo'.

The License page after activation: activations in use, this computer, key and renewal date.

Activations and deactivating a computer

A key allows a fixed number of computers. The License page shows how many are in use.

Deactivate this computer frees one activation so the key can be used elsewhere; the key stays valid.

Offline license activation

If the computer has no internet access, click **Activate offline** on the activation card and follow the request-code steps. See this guide for details [Activate SharePoint Essentials Toolkit 2027 Offline | Cognillo](#)

Getting Started

After the license is active there are two things to set up before you can run a report: a **connection** (how the toolkit signs in) and one or more **sites**. The Home page guides you through both; this section explains each step.

Step 1 - Add a connection

A connection profile tells the toolkit where SharePoint is and how to sign in. You can have several (for example production and test tenants, or an on-premises farm); one is the default. Connection profiles are stored in:

```
%USERPROFILE%\Documents\SharePoint Essentials Toolkit\Config\ConnectionProfiles.json
```

1. Click **Connections** in the left menu (or **Add a connection** on the Home page), then **New connection**.
2. **Use it for:** leave **SharePoint sites & content** selected. Choose **Microsoft 365 user activity** only when creating the audit-log connection for the Activity tasks (certificate sign-in; see the Installation and Deployment Guide).
3. **Root site:** paste the tenant URL, for example <https://contoso.sharepoint.com/>. Do not use the admin URL (contoso-admin.sharepoint.com). For SharePoint Server use the web application URL, for example <https://intranet>. The toolkit works out Online versus on-premises and the tenant ID from the URL.
4. **How to sign in:** **Web Browser** is recommended for interactive use (your own account, MFA supported). **Certificate** (app registration + .pfx) is recommended for scheduled and unattended jobs. **Username & password** and **Windows account** (Kerberos or NTLM) are for on-premises farms.
5. **Advanced** (optional): choose the cloud (Azure Public, US Government, China), turn on single sign-on with the Windows account if Conditional Access requires it, and choose whether to use Cognillo's shared app registration or your own. An app registration in your tenant is required for Teams membership, Entra ID group members in permission reports, analytics and user activity.
6. **Name** the connection (for example Contoso Prod) and click **Test and save**. A browser window opens for sign-in; the connection is only saved when the test succeeds.

SE

SharePoint Essentials Toolkit

Enterprise Suite

I want to

remove a user from

Idle

MENU

Dashboard

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Enterprise v12.1.0.0 - by Cognillo

Tasks / Connections

Connections

How the toolkit signs in to SharePoint.

New connection

Demo Service Account

cognillodemo.sharepoint.com · Web Browser

DEFAULT

✓

User Activity Services

cognillodemo.sharepoint.com · Certificate

USER ACTIVITY

✓

Demo Certificate Authe...

cognillodemo.sharepoint.com · Certificate

✗

3 connections · Clear sign-in cache

New connection

What it is for, where, how to sign in, and a name.

Use it for

☒

SharePoint sites & content

Reports and tasks on sites, lists, items and permissions. This is the usual one.

☐

Microsoft 365 user activity

Reads the audit log for See who did what. Needs an app registration with audit-log permission; sign-in is by certificate.

Root site

https://cognillodemo.sharepoint.com/

Paste the tenant URL - the toolkit works out Online vs on-premises and the tenant ID from it

How to sign in

☐

Certificate

App + .pfx file

☒

Web Browser

Browser sign-in, MFA

☐

Username & password

On-premises farms

☐

Windows account

Kerberos or NTLM

A browser window opens the first time this connection is used, and the sign-in is remembered until you clear it.

New connection: purpose, root site and sign-in method.

SE

SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, fol...

Idle

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Enterprise v12.1.0.0 · by Cognillo

Tasks / Connections

Connections

How the toolkit signs in to SharePoint.

New connection

Demo Service Account

cognillodemo.sharepoint.com · Web Browser

DEFAULT

✓

User Activity Services

cognillodemo.sharepoint.com · Certificate

USER ACTIVITY

✓

Demo Certificate Authe...

cognillodemo.sharepoint.com · Certificate

✗

3 connections · Clear sign-in cache

Microsoft 365 user activity

Reads the audit log for See who did what. Needs an app registration with audit-log permission; sign-in is by certificate.

Root site

https://cognillodemo.sharepoint.com/

Paste the tenant URL - the toolkit works out Online vs on-premises and the tenant ID from it

How to sign in

Certificate

App + .pfx file

Web Browser

Browser sign-in, MFA

Username & password

On-premises farms

Windows account

Kerberos or NTLM

A browser window opens the first time this connection is used, and the sign-in is remembered until you clear it.

Advanced Azure Public Cloud

Name

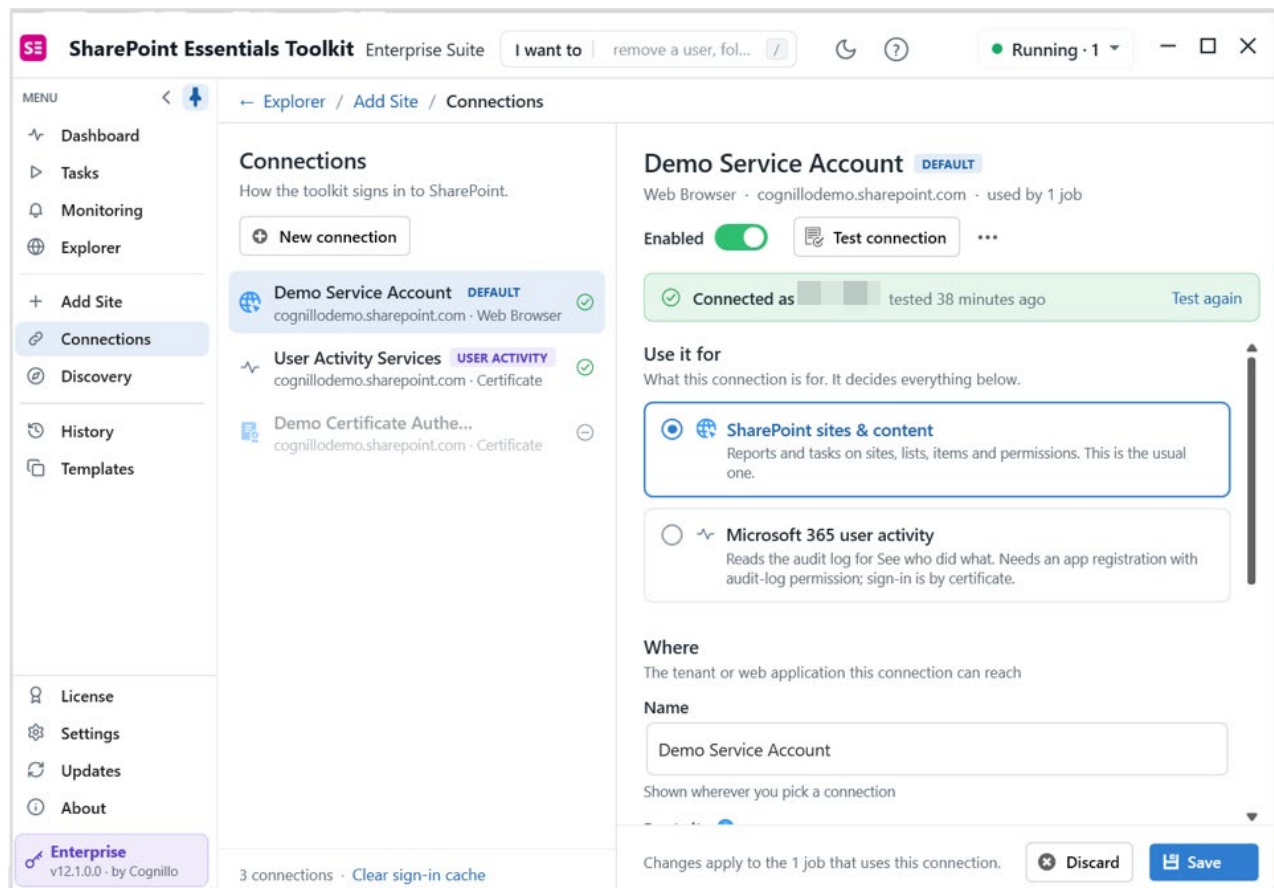
Contoso Prod

Shown wherever you pick a connection

Cancel

Test and save

Advanced options, name, and Test and save.



The Connections page with a tested connection. Clear sign-in cache forces a fresh sign-in.

Step 2 - Add your sites

Sites added here appear in Explorer, in the Pick sites step of every task, and in Dashboard insights. Click **Add Site** in the left menu.

1. **Sign in with:** the connection to use for these sites (the default is pre-selected).
2. **Which sites** - pick one of three ways:
 - **Paste URLs** - one site URL per line, or separated by semicolons or spaces. Each URL is checked as you type.
 - **From Excel or CSV** - import a spreadsheet with a single column of site URLs. Tip: export Active sites from the SharePoint admin center and import the file here.
 - **Search the tenant** - search site titles and URLs, or leave the box empty to list every site the connection can see. Results are security trimmed to the signed-in account.
3. Leave **Include subsites** on to add subsites as well.
4. Review **Sites to add**, choose the Home group under **Show on Home under**, and click **Add N sites**.

SE

SharePoint Essentials Toolkit

Enterprise Suite

I want to

remove a user, fol...

/

🌙

?

Running · 1

—

□

×

MENU

Dashboard

Tasks

Monitoring

Explorer

+ Add Site

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History

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Enterprise v12.1.0.0 · by Cognillo

← Explorer / Add Site

Sign in with

The connection whose account will be used to reach these sites

Demo Service Account

▼

New connection
Manage connections

✓

Connected · cognillodemo.sharepoint.com · Web Browser

Which sites

Paste URLs

From Excel or CSV

Search the tenant

Include subsites ☒

One URL per line, or separated by ; or spaces. Paste from anywhere — the toolkit checks each one as you go.

Sites to add

Paste or type one or more site URLs above.

Show on Home under

My Production Environment

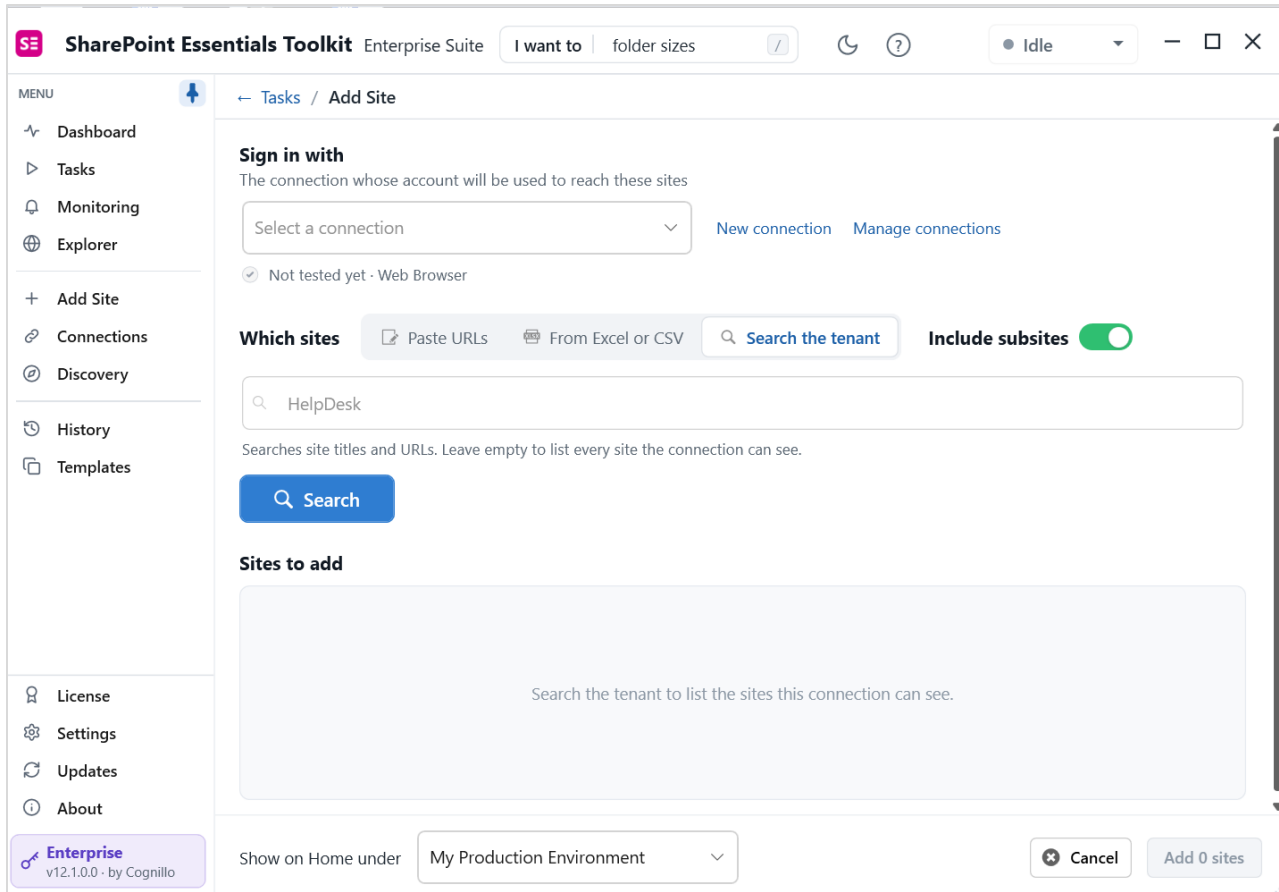
▼

✕ Cancel

Add 0 sites

Add Site: choose the connection, paste URLs or import, and pick the Home group.

Page 22 of 47



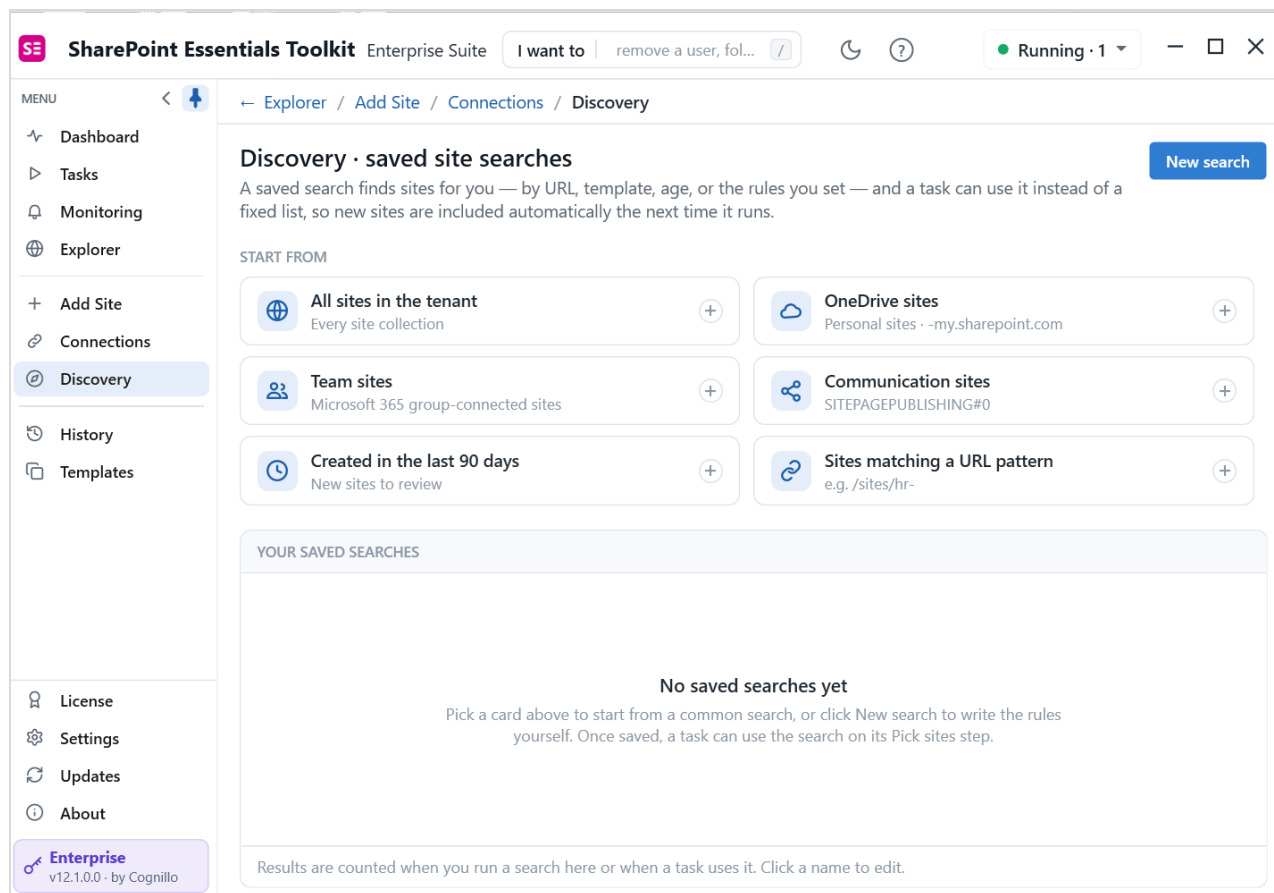
Search the tenant lists every site the connection can see.

Site groups

Sites are organised into groups (for example My Production Environment). Groups are used by the Pick sites tree, by Explorer and by monitors, which run against every site in a group including sites added later. Manage groups from the Pick sites step or from Monitoring > New monitor > Manage site groups.

Discovery: let a task find its own sites

Instead of a fixed list, a task can use a **saved search**: all sites in the tenant, OneDrive sites, team sites, communication sites, sites created in the last 90 days, or sites matching a URL pattern such as /sites/hr-. Create one under **Discovery**, then choose **Use a saved search** in the Pick sites step. New sites that match are included the next time the task runs, which makes saved searches ideal for scheduled jobs and monitors.



Discovery: start from a common search or write your own rules.

Authentication methods

Choosing the sign-in method is the main decision when setting up the toolkit.

- **Web Browser** - sign in with your own account in a browser window. Works with MFA, federated identity providers (AD FS and third-party) and single sign-on. Recommended for day-to-day use. With your own app registration it also unlocks Teams and Entra ID group membership, analytics and user activity.
- **Certificate** - the toolkit signs in as an application using an app registration and a .pfx certificate. No prompts, so it is the right choice for scheduled and unattended jobs. SharePoint Online only; requires an Azure administrator to create the app registration.
- **Username & password** - SharePoint Server only. Least secure; not supported by SharePoint Online.
- **Windows account** - SharePoint Server with Kerberos or NTLM, using the signed-in Windows account.

An app registration is how a tenant decides which applications may read directory information such as user and group names. Cognillo does not have access to your tenant; the app registration delegates access to the signed-in user (web browser) or grants application permissions assigned by your tenant (certificate). The Installation and Deployment Guide explains how to create it.

Authentication comparison

	Web Browser (shared app)	Web Browser (own app registration)	Certificate	Username & password	Windows account
SharePoint Online	Yes	Yes	Yes	No	No
SharePoint Server	Yes	No	No	Yes	Yes
Supports MFA	Yes	Yes	N/A	No	N/A
Scheduled and unattended jobs	Not advised*	Not advised*	Yes	On-premises only	On-premises only
Needs an Azure administrator	No	Yes	Yes	No	No
Teams and Entra ID group members in permission reports	No	Yes	Yes	No	No
Site and item analytics	No	Yes	Yes	No	No
User activity (audit log) reports	No	No	Yes	No	No
Sign-in prompt when a job runs	First run, then cached	First run, then cached	Never	Never	Never

* Web browser sign-in relies on a cached token that expires. Jobs that run while the user is signed out, or long after the last interactive sign-in, can fail. Use a certificate connection for scheduled jobs on SharePoint Online.

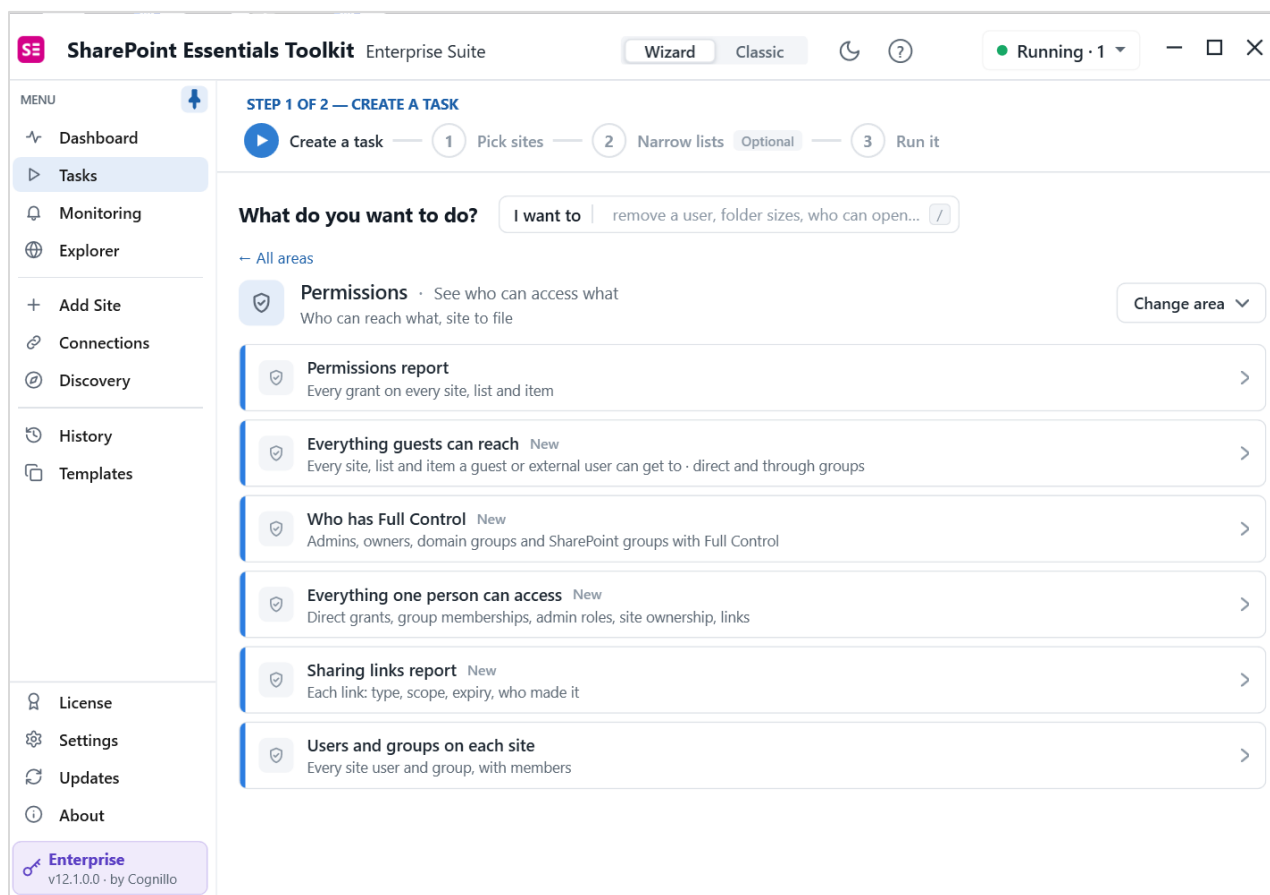
Without an app registration, permission reports list domain groups but cannot expand their members. With one, members and nested groups are shown.

Run Your First Task

A job is a task run against one or more sites and, optionally, specific lists. Report jobs only read; change jobs (remove permissions, replace text, fix links, apply labels) modify SharePoint and record a change log you can review and, for permission changes, undo. Every job appears in History with its report, log and settings while it runs and after it finishes.

Walkthrough: a permissions report

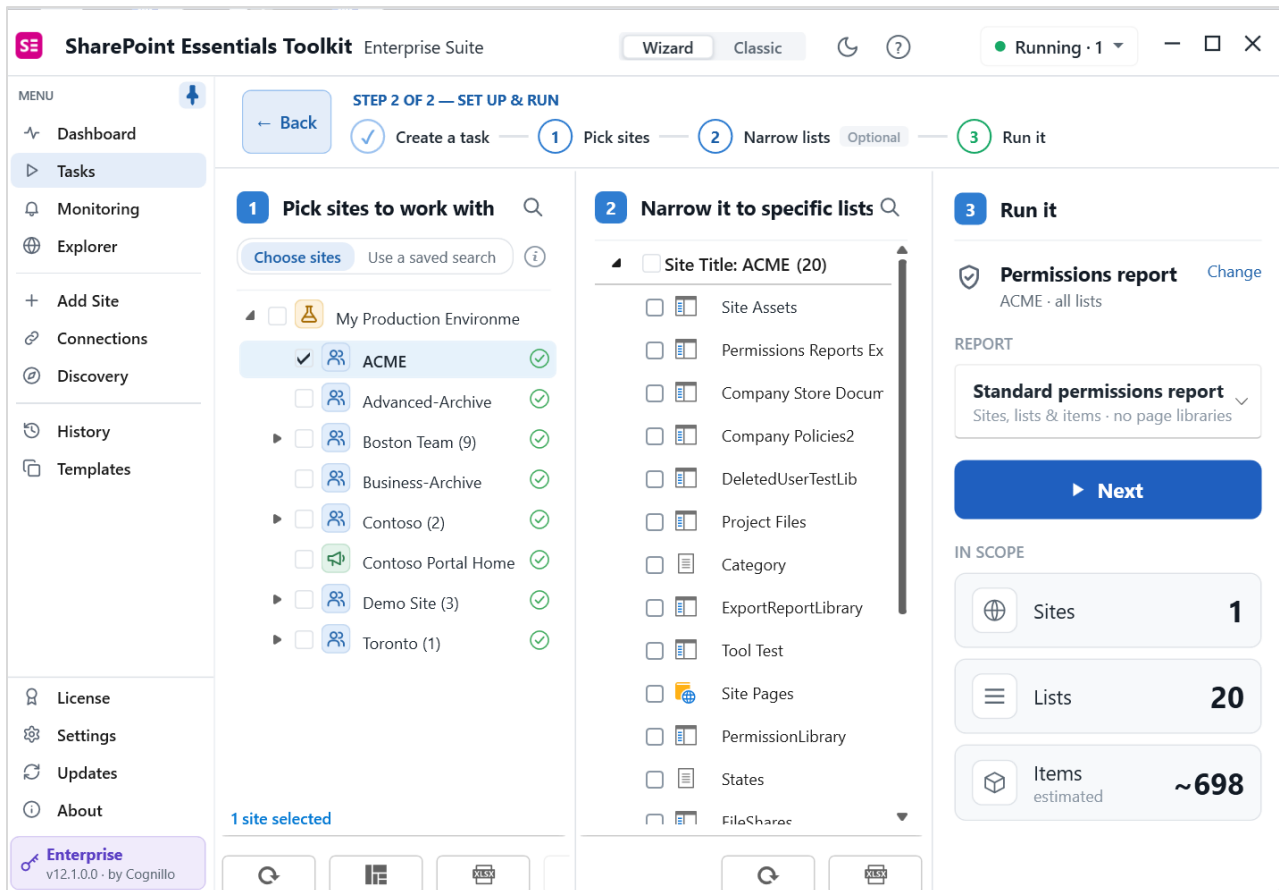
1. Click **Tasks**. Under **What do you want to do?** choose the **Permissions** area, then **Permissions report**. You can also type 'permissions' in **I want to**.



The screenshot shows the 'SharePoint Essentials Toolkit' interface. On the left is a 'MENU' sidebar with options: Dashboard, Tasks (selected), Monitoring, Explorer, Add Site, Connections, Discovery, History, and Templates. Below this are 'License', 'Settings', 'Updates', and 'About'. The main area is titled 'STEP 1 OF 2 — CREATE A TASK' with a progress bar showing '1 Pick sites', '2 Narrow lists', 'Optional', and '3 Run it'. Under 'What do you want to do?', there is a search bar 'I want to' with the text 'remove a user, folder sizes, who can open...'. Below this is a list of tasks under the 'Permissions' area (selected from a dropdown menu labeled 'Change area'). The tasks listed are: 'Permissions report' (Every grant on every site, list and item), 'Everything guests can reach' (New, Every site, list and item a guest or external user can get to - direct and through groups), 'Who has Full Control' (New, Admins, owners, domain groups and SharePoint groups with Full Control), 'Everything one person can access' (New, Direct grants, group memberships, admin roles, site ownership, links), 'Sharing links report' (New, Each link: type, scope, expiry, who made it), and 'Users and groups on each site' (Every site user and group, with members). The bottom of the interface shows 'Enterprise v12.1.0.0 - by Cognillo'.

Tasks in the Permissions area.

2. **Pick sites to work with:** tick one or more sites in the tree, or switch to **Use a saved search**. Expand a site to pick subsites. The **In scope** panel shows how many sites, lists and items the job will cover.
3. **Narrow it to specific lists** (optional): tick lists or libraries to limit the job to them. If nothing is ticked the whole site is included.
4. Under **Run it**, pick the report preset (for example Standard permissions report) and click **Next**.



SharePoint Essentials Toolkit Enterprise Suite

Wizard Classic

Running · 1

STEP 2 OF 2 — SET UP & RUN

← Back Create a task 1 Pick sites 2 Narrow lists Optional 3 Run it

1 Pick sites to work with

Choose sites Use a saved search

My Production Environment

- ☒ ACME ✓
- ☐ Advanced-Archive ✓
- ☐ Boston Team (9) ✓
- ☐ Business-Archive ✓
- ☐ Contoso (2) ✓
- ☐ Contoso Portal Home ✓
- ☐ Demo Site (3) ✓
- ☐ Toronto (1) ✓

1 site selected

2 Narrow it to specific lists

Site Title: ACME (20)

- ☐ Site Assets
- ☐ Permissions Reports Ex
- ☐ Company Store Docum
- ☐ Company Policies2
- ☐ DeletedUserTestLib
- ☐ Project Files
- ☐ Category
- ☐ ExportReportLibrary
- ☐ Tool Test
- ☐ Site Pages
- ☐ PermissionLibrary
- ☐ States
- ☐ FileShare

3 Run it

Permissions report Change

ACME · all lists

REPORT

Standard permissions report Sites, lists & items · no page libraries

Next

IN SCOPE

Sites **1**

Lists **20**

Items estimated **~698**

Enterprise v12.1.0.0 · by Cognillo

Step 2 of 2: one site picked, every list included, ready to run.

5. The job options page summarizes **What this job will do**: scope, what is reported, content filters and where the report goes. Click **Settings**, **Add filters** or **Set up** to change any of them, or **Change scope** to go back to the site picker. Give the job a name in the box at the top if you want something other than the default.

SE

SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, fol... /

Running · 1

MENU

Dashboard

Tasks

Monitoring

Explorer

Add Site

Connections

Discovery

History

Templates

License

Settings

Updates

About

Enterprise v12.1.0.0 · by Cognillo

Tasks / Pick sites & lists / Permissions report

Sites & lists

Permissions report

Permissions report

What this job will do

1 Scan 1 site(s) and every list and library in it

Page libraries are excluded from this report

Change scope

2 Report permissions on sites, lists, folders and files

Settings

3 Include everything — no content filters applied

Add filters

4 Save the report to History. No email, no SharePoint export

Set up

Ready to run

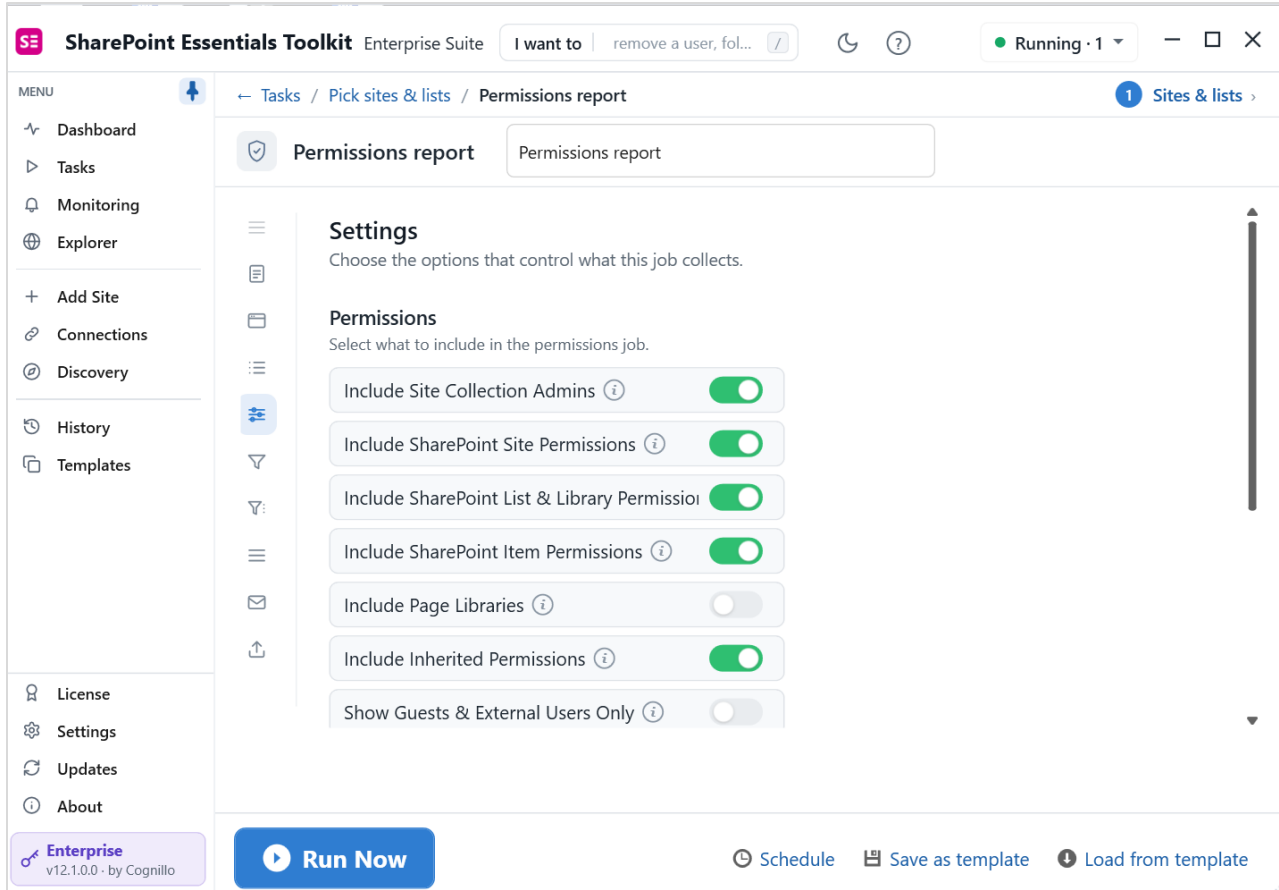
Run Now

Schedule

Save as template

Load from template

Job options: a plain-language summary of the run with links to each setting.



The screenshot shows the SharePoint Essentials Toolkit Enterprise Suite interface. The top bar includes the Cognillo logo, the product name, a search bar, and a status indicator showing 'Running · 1'. The left sidebar contains a menu with options: Dashboard, Tasks, Monitoring, Explorer, Add Site, Connections, Discovery, History, Templates, License, Settings, Updates, and About. The main content area is titled 'Permissions report' and contains a 'Settings' section with the instruction 'Choose the options that control what this job collects.' Below this is a 'Permissions' section with the instruction 'Select what to include in the permissions job.' and a list of six toggle switches: 'Include Site Collection Admins' (checked), 'Include SharePoint Site Permissions' (checked), 'Include SharePoint List & Library Permissions' (checked), 'Include SharePoint Item Permissions' (checked), 'Include Page Libraries' (unchecked), and 'Include Inherited Permissions' (checked). At the bottom of the settings section is a toggle for 'Show Guests & External Users Only' (unchecked). A 'Run Now' button is prominently displayed at the bottom left of the settings area. At the bottom right, there are three buttons: 'Schedule', 'Save as template', and 'Load from template'.

Permissions settings: what to include in the report.

6. Click **Run Now**. (Or **Schedule** to run it later, **Save as template** to reuse the settings, **Load from template** to start from saved settings.)
7. The report opens and fills in while the job runs. The header shows progress, items processed, unique permissions found, lists and sites completed and elapsed time. **Edit Options** changes settings and **Run Now** re-runs the job.

SE

SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, fol... /

Idle

MENU

Dashboard

Tasks

Monitoring

Explorer

Add Site

Connections

Discovery

History

Templates

License

Settings

Updates

About

Enterprise v12.1.0.0 - by Cognillo

Tasks / Permissions Report

Build a permissions report

Permissions report

Edit Options

Run Now

Completed 100% DONE 698 / 698 ITEMS 2 UNIQUE PERMI: 19 / 19 LISTS 1 / 1 SITES 0.67 ELAPSED (MIN) 0 pending saves

Permissions Matrix Report

Full Control Edit / Contribute Read Limited Access

All Permissions

Show the actions panel

Drag a column header here to group by that column

	Princi...	Site Title	Scope	Title	Status	Display Name
☐		ACME	Site	ACME	Permissions Reported	GC Greg Cor
☐		ACME	Site	ACME	Permissions Reported	AO ACME O
☐		ACME	Site	ACME	Permissions Reported	AL Arturo (I
☐		ACME	Site	ACME	Permissions Reported	AO ACME O
☐		ACME	Site	ACME	Permissions Reported	AN Aiko Nor
☐		ACME	Site	ACME	Permissions Reported	RL Rebecca
☐		ACME	Site	ACME	Permissions Reported	DC David Co
☐		ACME	Site	ACME	Permissions Reported	SB Sandra B
☐		ACME	Site	ACME	Permissions Reported	AM Al Marke
☐		ACME	Site	ACME	Permissions Reported	BC Barbara (
☐		ACME	Site	ACME	Permissions Reported	CL Carmen I

Actions

Status: Successfully completed job. Time elapsed 0.6698 minutes.

The Permissions Matrix Report, All Permissions view, while the job is complete.

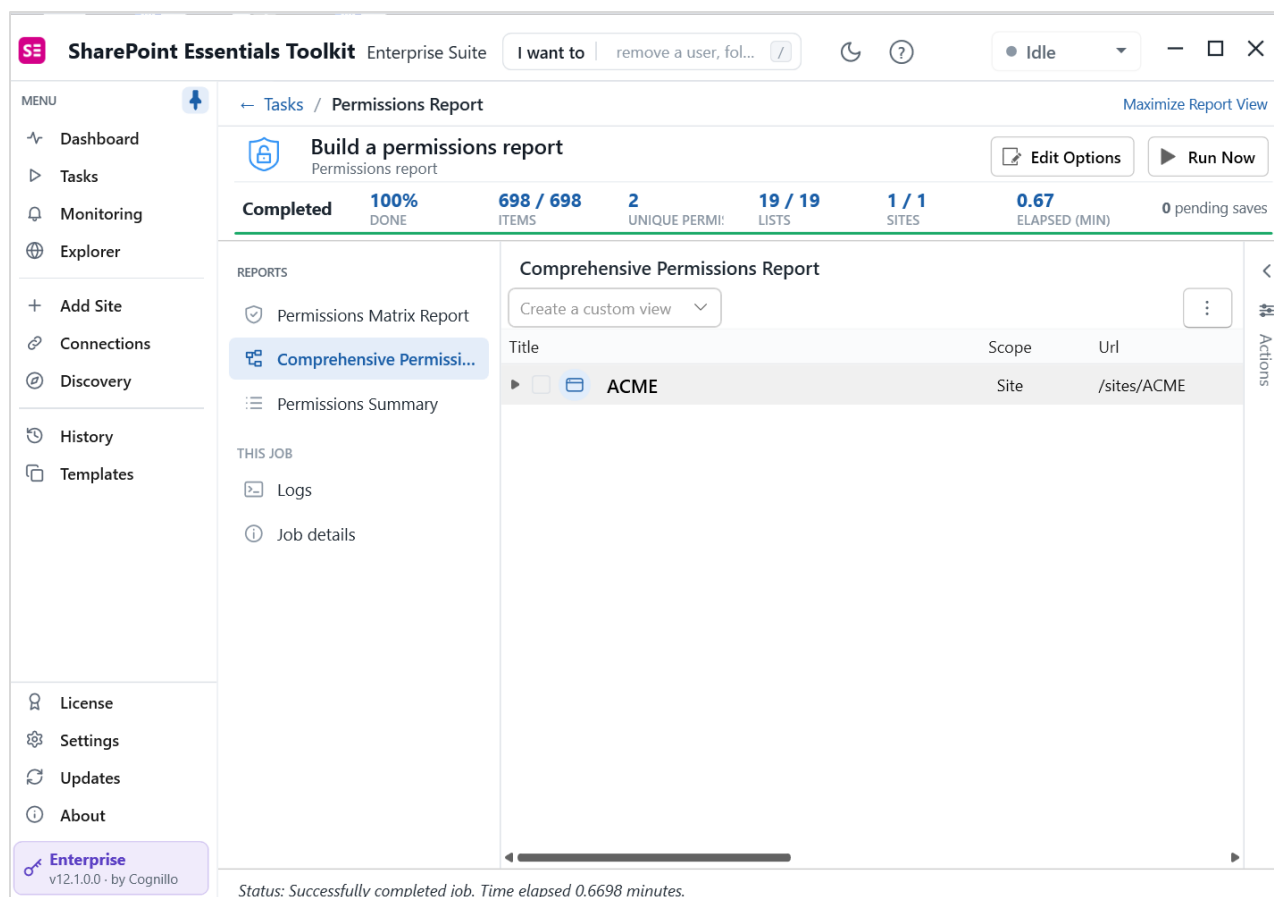
Other tasks

Every other task follows the same steps. The only differences are the settings and filters on the job options page and the actions available in the report. The sections below describe the parts that are common to all reports.

Working with Reports

Report layout

A job can produce more than one report. The panel on the left of the report lists them (for example Permissions Matrix Report, Comprehensive Permissions Report and Permissions Summary for a permissions job) together with **Logs** and **Job details** for the run. Click the menu button above the panel to show or hide the labels, and **Maximize report view** to give the grid the whole window.



SharePoint Essentials Toolkit Enterprise Suite | I want to | remove a user, fol... | Idle | Maximize Report View

Build a permissions report | Permissions report | Edit Options | Run Now

Completed 100% DONE | 698 / 698 ITEMS | 2 UNIQUE PERMI: | 19 / 19 LISTS | 1 / 1 SITES | 0.67 ELAPSED (MIN) | 0 pending saves

REPORTS

- Permissions Matrix Report
- Comprehensive Permissi...**
- Permissions Summary

THIS JOB

- Logs
- Job details

Comprehensive Permissions Report

Create a custom view

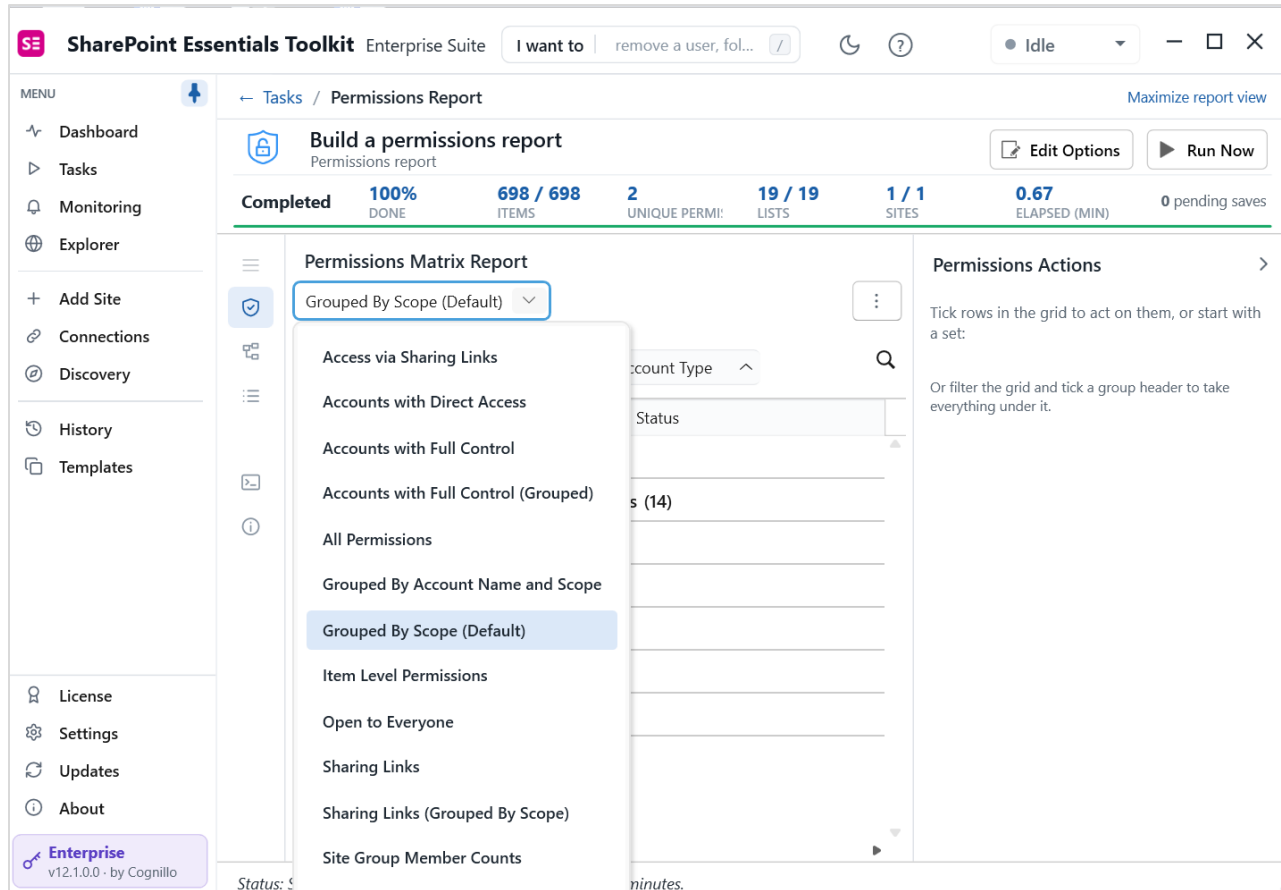
Title	Scope	Url
ACME	Site	/sites/ACME

Status: Successfully completed job. Time elapsed 0.6698 minutes.

Report navigation: the reports in this job, plus Logs and Job details.

Views and presets

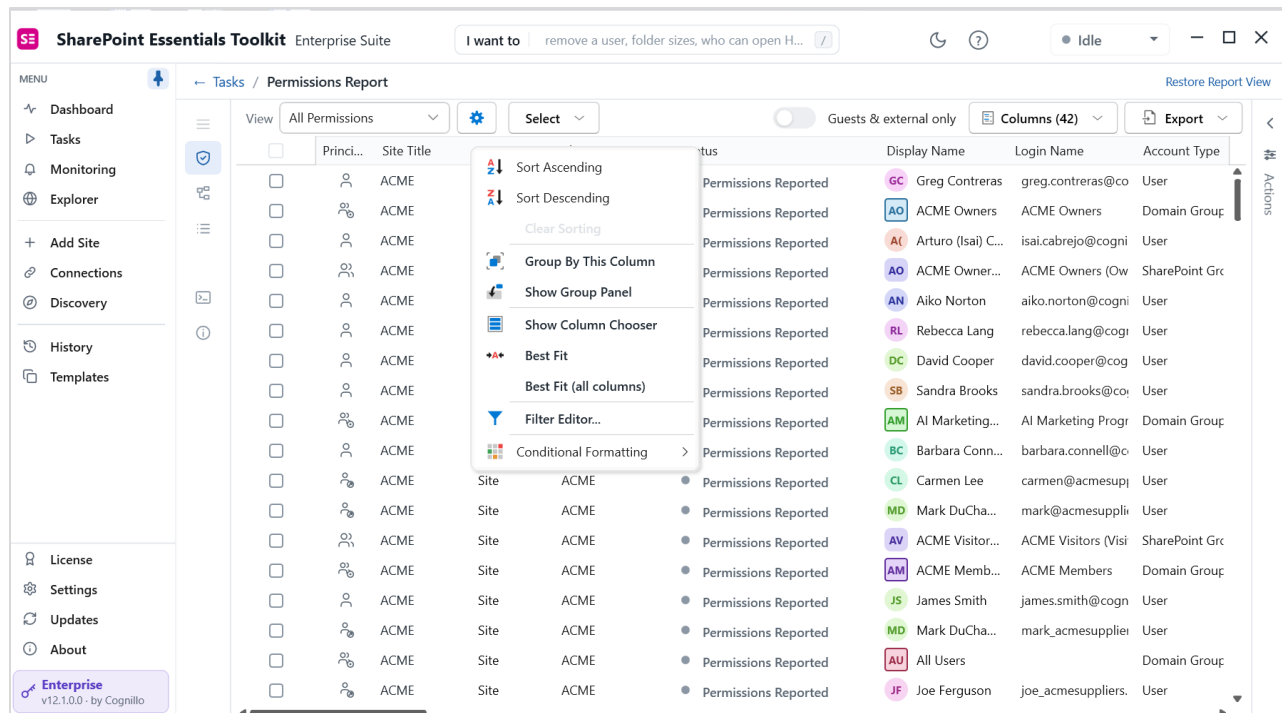
The **View** drop down switches between report presets - ready-made combinations of columns, grouping and filters such as Accounts with Full Control, Access via Sharing Links, Open to Everyone or Sharing Links (Grouped By Scope). After changing columns, grouping, sorting or filters you can save the result as a custom view and reuse it on later runs or in scheduled exports.



Report presets for a permissions report.

Grouping, sorting and filtering

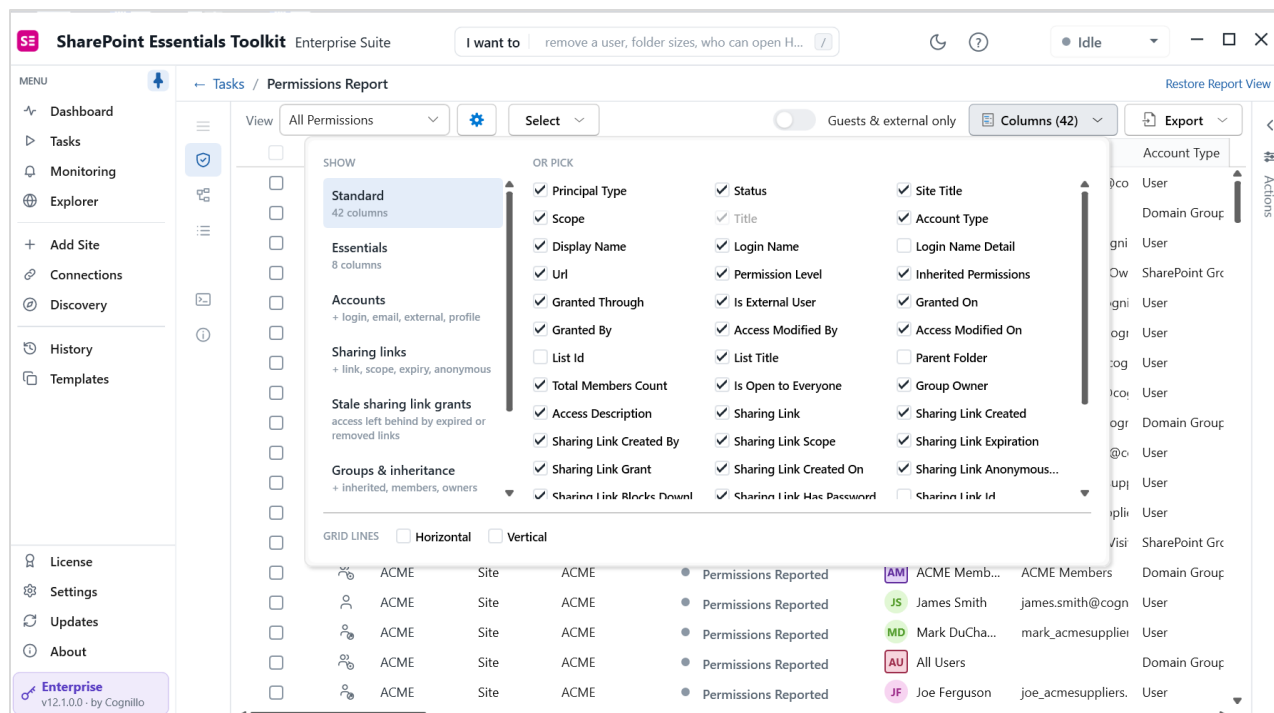
- Drag a column header to the group band above the grid to group by it; drag several for nested groups. Click a header to sort.
- Hover a header and click the funnel icon to filter on that column's values.
- Right-click a header for **Filter Editor** (rule-based filters), **Group By This Column, Best Fit**, **Conditional Formatting** and **Show Column Chooser**.



The column header menu.

Columns

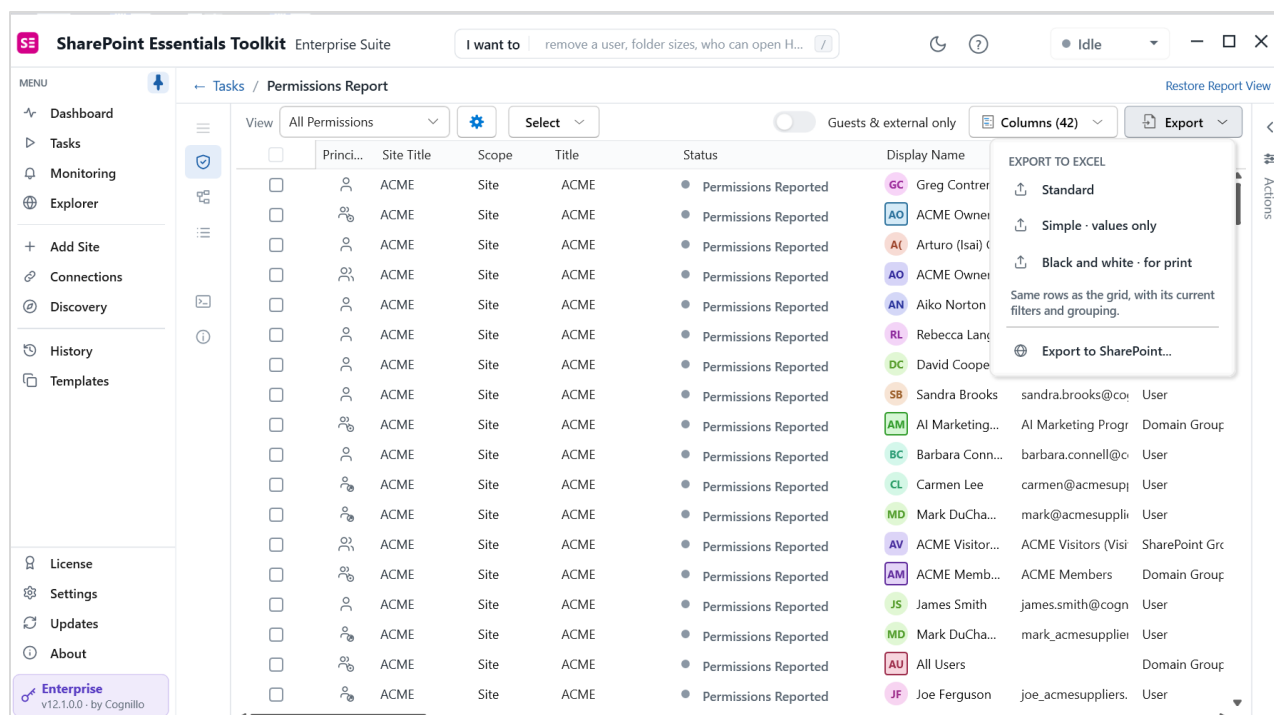
The **Columns** button lists column sets (Standard, Essentials, Accounts, Sharing links, Stale sharing link grants, Groups and inheritance) and every individual column, so you can show exactly what you need. Grid lines can be turned on or off from the same menu.



Columns: choose a column set or tick individual columns.

Export and sharing

Export writes the report to Excel - Standard, Simple (values only) or Black and white for print - using the rows, filters and grouping currently on screen. **Export to SharePoint** writes the rows to a SharePoint list so that other people can use the result without the toolkit. Reports can also be emailed or exported automatically after every run; set this up on the job options page under **Set up** next to 'Save the report to History'.



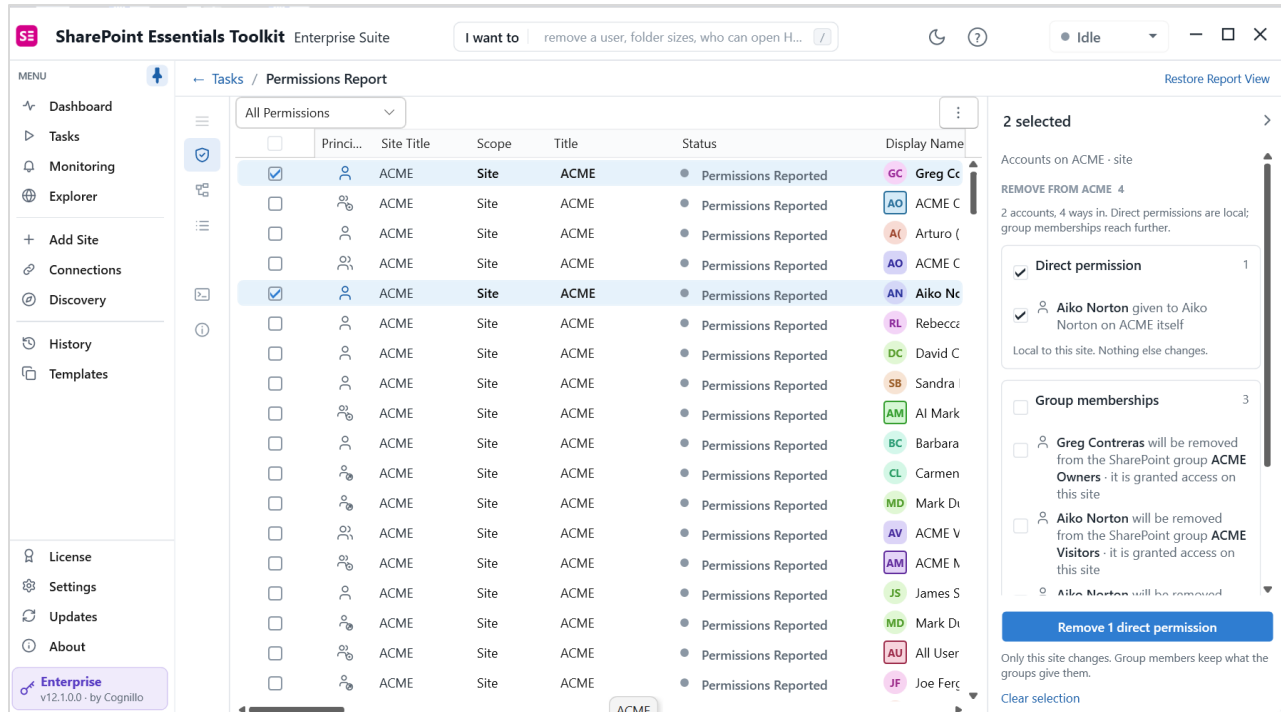
The screenshot shows the 'SharePoint Essentials Toolkit Enterprise Suite' interface. The main window displays a 'Permissions Report' for 'ACME'. The report table has columns: Principals, Site Title, Scope, Title, Status, and Display Name. The 'Status' column shows 'Permissions Reported' for all entries. The 'Display Name' column lists various users and groups. An 'Export' dropdown menu is open, showing options: 'Standard', 'Simple - values only', 'Black and white - for print', and 'Export to SharePoint...'. The 'Export to SharePoint...' option is highlighted.

Principals	Site Title	Scope	Title	Status	Display Name
	ACME	Site	ACME	Permissions Reported	Greg Contrer...
	ACME	Site	ACME	Permissions Reported	ACME Owner
	ACME	Site	ACME	Permissions Reported	Arturo (Isai) C...
	ACME	Site	ACME	Permissions Reported	ACME Owner
	ACME	Site	ACME	Permissions Reported	Aiko Norton
	ACME	Site	ACME	Permissions Reported	Rebecca Lang
	ACME	Site	ACME	Permissions Reported	David Coope
	ACME	Site	ACME	Permissions Reported	Sandra Brooks
	ACME	Site	ACME	Permissions Reported	AI Marketing...
	ACME	Site	ACME	Permissions Reported	Barbara Conn...
	ACME	Site	ACME	Permissions Reported	Carmen Lee
	ACME	Site	ACME	Permissions Reported	Mark DuCha...
	ACME	Site	ACME	Permissions Reported	ACME Visitor...
	ACME	Site	ACME	Permissions Reported	ACME Memb...
	ACME	Site	ACME	Permissions Reported	James Smith
	ACME	Site	ACME	Permissions Reported	Mark DuCha...
	ACME	Site	ACME	Permissions Reported	All Users
	ACME	Site	ACME	Permissions Reported	Joe Ferguson

Export options.

Acting on a report

Reports that support changes have an **Actions** panel on the right. Tick rows in the grid (or a group header to take everything under it) and the panel explains exactly what will change - for example which direct permissions will be removed and which group memberships are affected - before you confirm. Changes are written to a change log in History, and permission changes can be undone from there.



SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, folder sizes, who can open H...

Tasks / Permissions Report

2 selected

Accounts on ACME - site

REMOVE FROM ACME 4

2 accounts, 4 ways in. Direct permissions are local; group memberships reach further.

☒ Direct permission 1

☒ Aiko Norton given to Aiko Norton on ACME itself

Local to this site. Nothing else changes.

☐ Group memberships 3

☐ Greg Contreras will be removed from the SharePoint group **ACME Owners** - it is granted access on this site

☐ Aiko Norton will be removed from the SharePoint group **ACME Visitors** - it is granted access on this site

☐ Aiko Norton will be removed

Remove 1 direct permission

Only this site changes. Group members keep what the groups give them.

Clear selection

	Princi...	Site Title	Scope	Title	Status	Display Name
☒	[User Icon]	ACME	Site	ACME	Permissions Reported	GC Greg Cc
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AO ACME C
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AI Arturo (
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AO ACME C
☒	[User Icon]	ACME	Site	ACME	Permissions Reported	AN Aiko Nc
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	RL Rebecca
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	DC David C
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	SB Sandra
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AM Al Mark
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	BC Barbara
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	CL Carmen
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	MD Mark D
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AV ACME V
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AM ACME M
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	JS James S
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	MD Mark D
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	AU All User
☐	[User Icon]	ACME	Site	ACME	Permissions Reported	JF Joe Fer

Two accounts ticked in a permissions report; the Actions panel explains the change before it is made.

Typical actions include: remove a person's direct permissions, remove or downgrade sharing links, set or shorten link expiry, reset unique permissions to inherited, check in or discard checkouts, replace text, fix links, apply or remove sensitivity labels and send files to Microsoft 365 Archive.

Logs and job details

Logs shows every message the job wrote, with level and site. Turn on **Enable Detailed Logging** before a run when working with support, and use **Open Debug Logs** to open the log folder. **Job details** shows the settings the job ran with.

SE

SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, fol... /

Idle

MENU

Dashboard
Tasks
Monitoring
Explorer
Add Site
Connections
Discovery
History
Templates
License
Settings
Updates
About
Enterprise v12.1.0.0 - by Cognillo

Tasks / Permissions Report

Build a permissions report

Completed

100% DONE

698 / 698 ITEMS

2 UNIQUE PERMI:

19 / 19 LISTS

1 / 1 SITES

0.67 ELAPSED (MIN)

0 pending saves

REPORTS

Permissions Matrix Report
Comprehensive Permissi...
Permissions Summary
THIS JOB
Logs
Job details

Logs

View Create a custom view

Columns (7)

Export

Date

Site Title

Level

Message

10/4/2026 7:03:01...
ACME
Important
Successfully completed job. Time e
10/4/2026 7:03:01...
ACME
Important
Completed work for SharePoint site
10/4/2026 7:03:01...
ACME
Important
Completed processing all lists in sit
10/4/2026 7:03:01...
ACME
Important
Completed processing items in list
10/4/2026 7:03:01...
ACME
Important
32 of 32 items in '/sites/ACME/Tool
10/4/2026 7:03:01...
ACME
Important
Fetching 32 items from '/sites/ACM
10/4/2026 7:03:00...
ACME
Important
Processing items in list '/sites/ACM
10/4/2026 7:03:00...
ACME
Important
Completed processing items in list
10/4/2026 7:03:00...
ACME
Important
22 of 23 items in '/sites/ACME/Lists
10/4/2026 7:03:00...
ACME
Important
Finished processing 1 uniquely peri
10/4/2026 7:03:00...
ACME
Important
Matched Large Domain Group Mer

Enable Detailed Logging

Off

Refresh

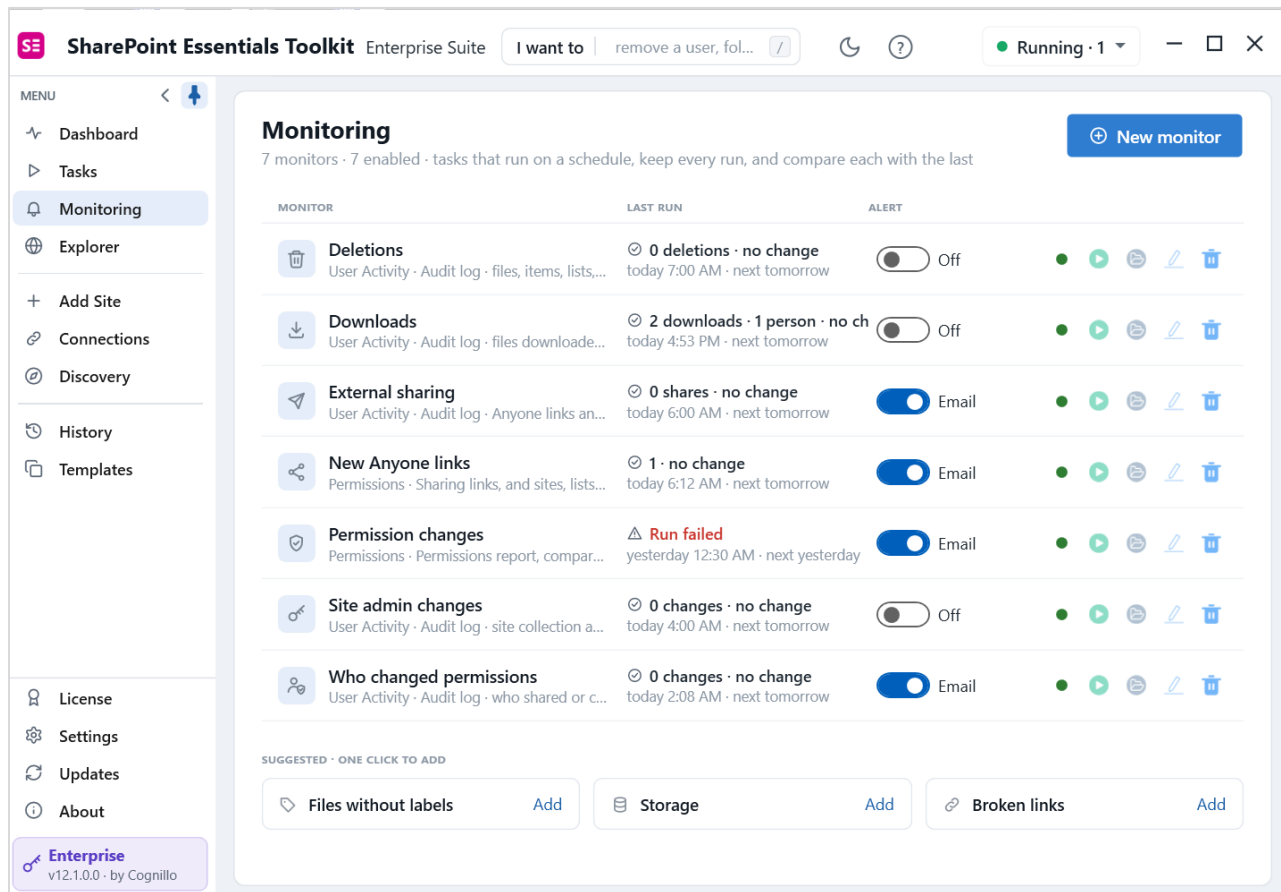
Open Debug Logs

Status: Successfully completed job. Time elapsed 0.6698 minutes.

The Logs view for a completed job.

Monitoring and the Dashboard

A monitor is a task that runs on a schedule, keeps every run, and compares each run with the last. The Dashboard shows the trend; an alert can email you when something new appears. Monitors are the quickest way to watch oversharing, permission drift, deletions, downloads, external sharing, site administrator changes, files without labels, storage and broken links.



SharePoint Essentials Toolkit Enterprise Suite | I want to | remove a user, fol... | Running · 1

Monitoring
7 monitors · 7 enabled · tasks that run on a schedule, keep every run, and compare each with the last

MONITOR	LAST RUN	ALERT
Deletions User Activity · Audit log · files, items, lists,...	🕒 0 deletions · no change today 7:00 AM · next tomorrow	🔇 Off
Downloads User Activity · Audit log · files downloade...	🕒 2 downloads · 1 person · no ch today 4:53 PM · next tomorrow	🔇 Off
External sharing User Activity · Audit log · Anyone links an...	🕒 0 shares · no change today 6:00 AM · next tomorrow	🔵 Email
New Anyone links Permissions · Sharing links, and sites, lists...	🕒 1 · no change today 6:12 AM · next tomorrow	🔵 Email
Permission changes Permissions · Permissions report, compar...	⚠️ Run failed yesterday 12:30 AM · next yesterday	🔵 Email
Site admin changes User Activity · Audit log · site collection a...	🕒 0 changes · no change today 4:00 AM · next tomorrow	🔇 Off
Who changed permissions User Activity · Audit log · who shared or c...	🕒 0 changes · no change today 2:08 AM · next tomorrow	🔵 Email

SUGGESTED · ONE CLICK TO ADD

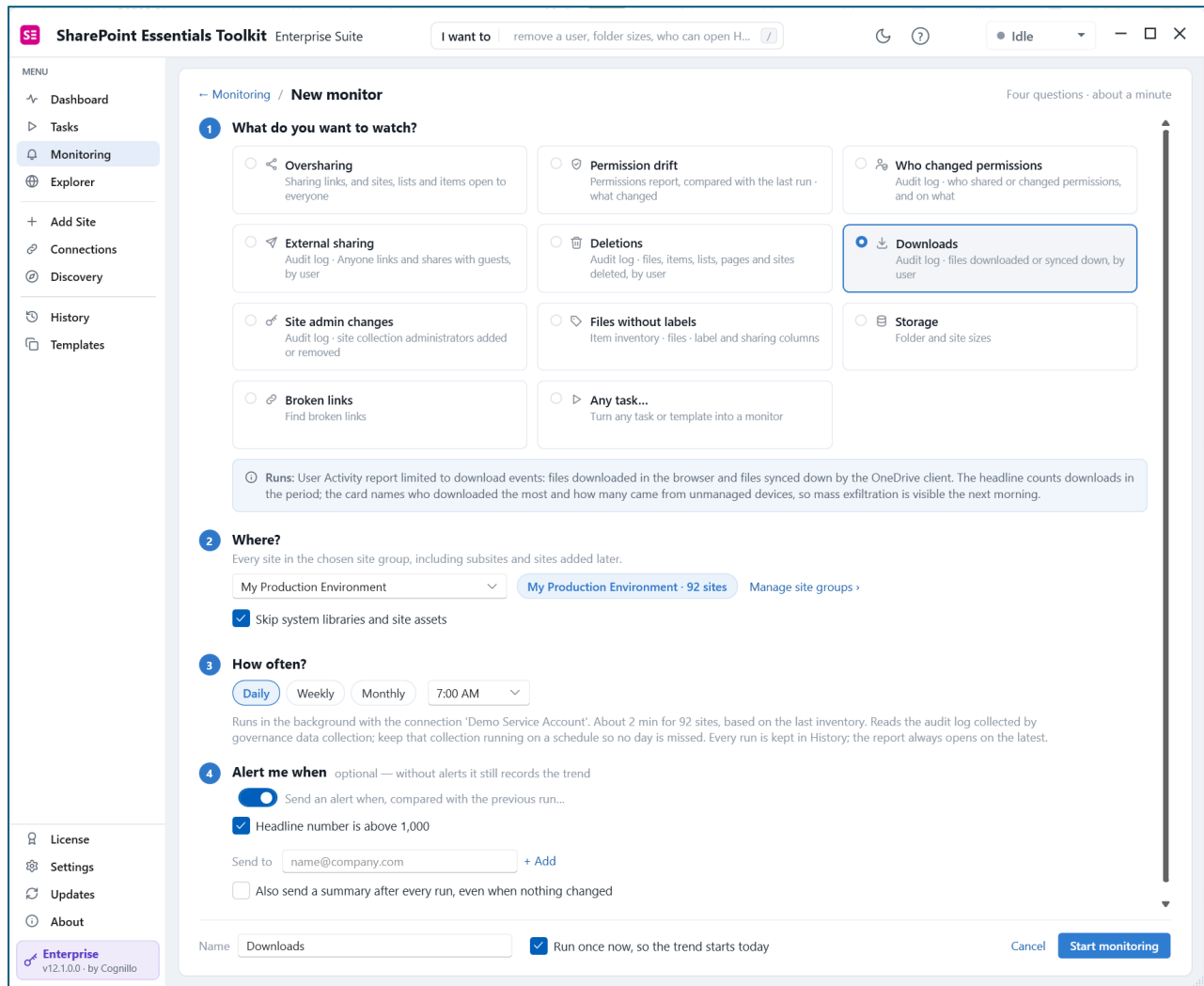
- Files without labels** [Add](#)
- Storage** [Add](#)
- Broken links** [Add](#)

The Monitoring page: every monitor, its last and next run, alert state and actions.

Create a monitor

1. Click **Monitoring**, then **New monitor** (or **Monitor another report** on the Dashboard).
2. **What do you want to watch?** Pick a ready-made monitor, or **Any task** to turn a task or template into a monitor.
3. **Where?** Choose a site group. Every site in the group is included, including sites added later. Leave **Skip system libraries and site assets** on unless you need them.

4. **How often?** Daily, weekly or monthly and the time. The estimated duration is shown based on the last inventory.
5. **Alert me when** - turn on alerts, choose the condition (for example something new appears that was not in the previous run), add recipients, and optionally send a summary after every run. Email is configured once under Settings > Email.
6. Name the monitor, leave **Run once now** ticked so the trend starts today, and click **Start monitor**.



SharePoint Essentials Toolkit Enterprise Suite

I want to remove a user, folder sizes, who can open H...

Idle

Monitoring / New monitor Four questions - about a minute

1 What do you want to watch?

- ☐ **Oversharing**
Sharing links, and sites, lists and items open to everyone
- ☐ **Permission drift**
Permissions report, compared with the last run - what changed
- ☐ **Who changed permissions**
Audit log - who shared or changed permissions, and on what
- ☐ **External sharing**
Audit log - Anyone links and shares with guests, by user
- ☐ **Deletions**
Audit log - files, items, lists, pages and sites deleted, by user
- ☒ **Downloads**
Audit log - files downloaded or synced down, by user
- ☐ **Site admin changes**
Audit log - site collection administrators added or removed
- ☐ **Files without labels**
Item inventory - files - label and sharing columns
- ☐ **Storage**
Folder and site sizes
- ☐ **Broken links**
Find broken links
- ☐ **Any task...**
Turn any task or template into a monitor

Runs: User Activity report limited to download events: files downloaded in the browser and files synced down by the OneDrive client. The headline counts downloads in the period; the card names who downloaded the most and how many came from unmanaged devices, so mass exfiltration is visible the next morning.

2 Where?
Every site in the chosen site group, including subsites and sites added later.

My Production Environment **My Production Environment - 92 sites** Manage site groups >

☒ Skip system libraries and site assets

3 How often?

☒ Daily ☐ Weekly ☐ Monthly 7:00 AM

Runs in the background with the connection 'Demo Service Account'. About 2 min for 92 sites, based on the last inventory. Reads the audit log collected by governance data collection; keep that collection running on a schedule so no day is missed. Every run is kept in History; the report always opens on the latest.

4 Alert me when optional — without alerts it still records the trend

☒ Send an alert when, compared with the previous run...

☒ Headline number is above 1,000

Send to name@company.com + Add

☐ Also send a summary after every run, even when nothing changed

Name Downloads ☒ Run once now, so the trend starts today

Cancel **Start monitoring**

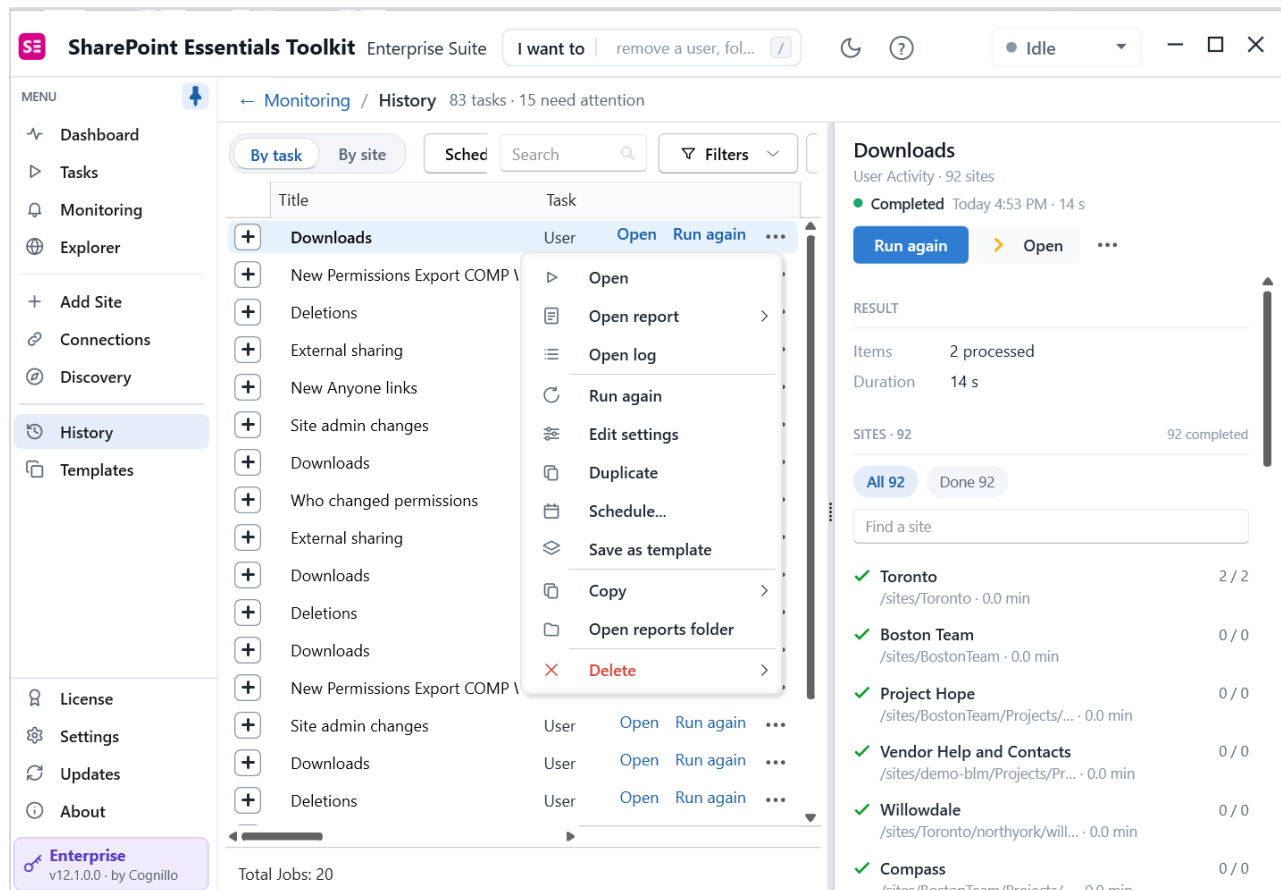
Monitors run in the background using the connection shown in the wizard and are scheduled the same way as scheduled jobs, so the same authentication advice applies (see Scheduled Jobs). Every run is kept in History and the Dashboard card always opens the latest.

History and Templates

History

History lists every job: manual runs, scheduled runs, monitors and sync jobs. Switch between **By task** and **By site**, filter with the status drop down (All, Needs attention, Changes, Scheduled, Exported), use **Filters** for date and job type, or search by name.

Select a row to see the result summary and per-site progress on the right. The row menu (or right-click) offers **Open**, **Open report**, **Open log**, **Run again**, **Edit settings**, **Duplicate**, **Schedule**, **Save as template**, **Copy** (job ID, PowerShell command) and **Open reports folder**.



SharePoint Essentials Toolkit Enterprise Suite I want to remove a user, fol... / ? Idle

MENU

- Dashboard
- Tasks
- Monitoring
- Explorer
- Add Site
- Connections
- Discovery
- History**
- Templates
- License
- Settings
- Updates
- About

Enterprise v12.1.0.0 - by Cognillo

Monitoring / History 83 tasks · 15 need attention

By task By site Sched Search Filters

Title	Task	User	Open	Run again	...
+ Downloads		User	Open	Run again	...
+ New Permissions Export COMP V		User	Open	Run again	...
+ Deletions		User	Open	Run again	...
+ External sharing		User	Open	Run again	...
+ New Anyone links		User	Open	Run again	...
+ Site admin changes		User	Open	Run again	...
+ Downloads		User	Open	Run again	...
+ Who changed permissions		User	Open	Run again	...
+ External sharing		User	Open	Run again	...
+ Downloads		User	Open	Run again	...
+ Deletions		User	Open	Run again	...
+ Downloads		User	Open	Run again	...
+ New Permissions Export COMP V		User	Open	Run again	...
+ Site admin changes		User	Open	Run again	...
+ Downloads		User	Open	Run again	...
+ Deletions		User	Open	Run again	...

Downloads
User Activity · 92 sites
Completed Today 4:53 PM - 14 s
Run again Open ...

RESULT

Items 2 processed
Duration 14 s

SITES · 92 92 completed

All 92 Done 92

Find a site

- ✓ Toronto /sites/Toronto - 0.0 min 2 / 2
- ✓ Boston Team /sites/BostonTeam - 0.0 min 0 / 0
- ✓ Project Hope /sites/BostonTeam/Projects/... - 0.0 min 0 / 0
- ✓ Vendor Help and Contacts /sites/demo-blm/Projects/Pr... - 0.0 min 0 / 0
- ✓ Willowdale /sites/Toronto/northyork/will... - 0.0 min 0 / 0
- ✓ Compass /sites/BostonTeam/Projects/... - 0.0 min 0 / 0

Total Jobs: 20

History filtered to scheduled runs, with the row menu open.

Note: History entries cannot be edited. This keeps the audit trail intact: a job in History always shows the settings it actually ran with. To run with different settings, use **Edit settings** or **Duplicate** to start a new job from the saved settings, or use a template or a scheduled job.

Templates

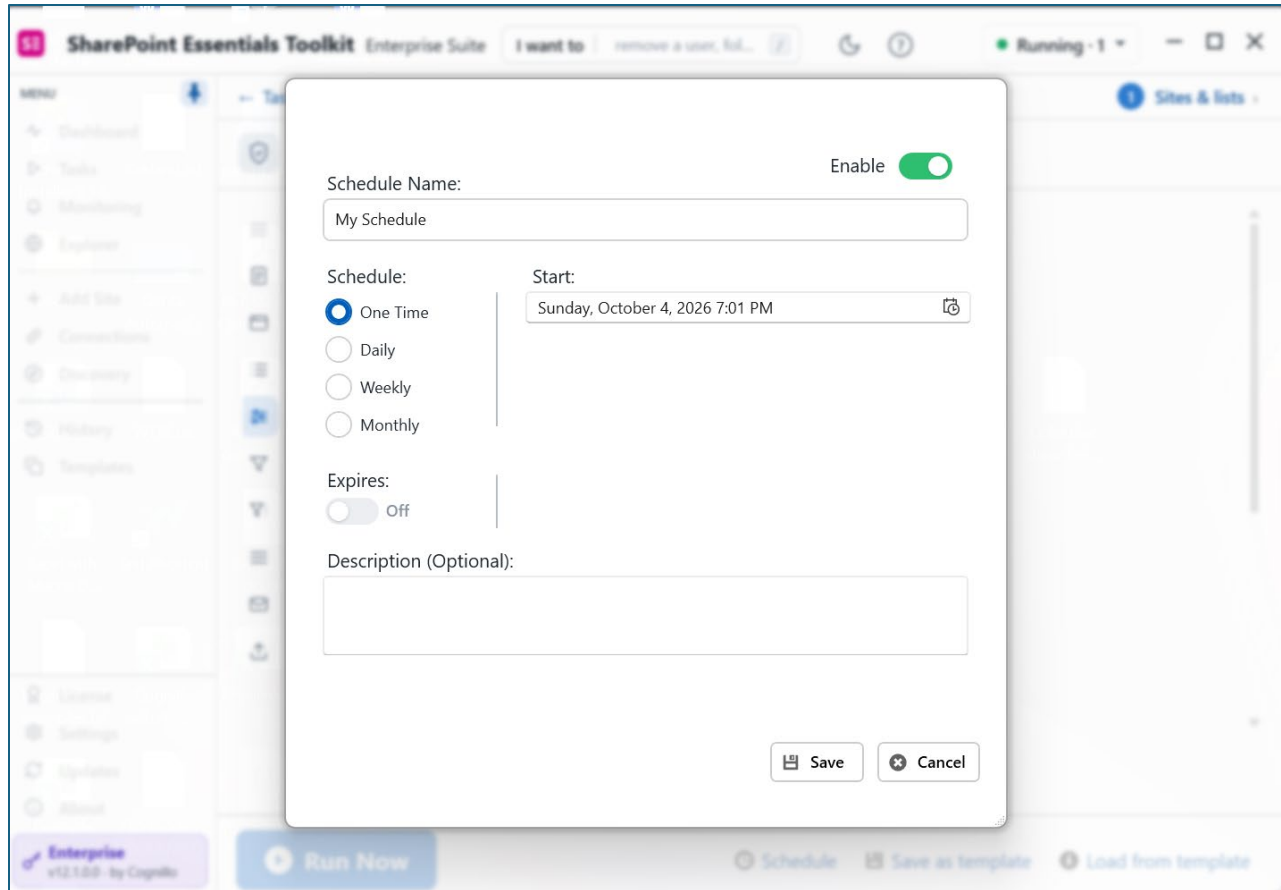
A template is a saved set of job settings, optionally with sites. Create one from the job options page (**Save as template**) or from a History row. Templates can be run from the Templates page, loaded into a new job (**Load from template**), used as the basis of a monitor, or run from PowerShell by name. Export the template list from the Templates page when you need the names for scripting.

Scheduled Jobs

The toolkit schedules jobs through Windows Task Scheduler but you manage them entirely from the toolkit. The application does not need to be running for a scheduled job to execute; the computer must be on and able to reach SharePoint.

How to schedule a job

1. Create the task as usual: pick the task, pick sites and lists, and set the options on the job options page.
2. Click **Schedule** at the bottom of the job options page.
3. Turn on **Enable**, enter a schedule name, choose One Time, Daily, Weekly or Monthly, set the start date and time and (optionally) an expiry and description.
4. Click **Save**. The schedule appears in History under the **Scheduled** filter, where it can be run now, edited or deleted.



The Schedule dialog.

Authentication for scheduled jobs

SharePoint Online requires modern authentication. A web browser connection relies on a cached token, which can expire between runs and cause a scheduled job to fail with a sign-in error. For reliable scheduled and unattended runs on SharePoint Online, use a **Certificate** connection. For runs that must happen while nobody is signed in to Windows, the schedule can be created to run as the SYSTEM account; see 'How to create a scheduled job with the SYSTEM account' in the online documentation.

Viewing scheduled job results

Scheduled runs appear in History like any other job; open the report and log from there. While a scheduled job runs, a console window shows progress and closes when the job finishes.

Note: A job started by the scheduler or PowerShell cannot be cancelled from the toolkit. End the SharePoint Essentials Toolkit.exe background process in Task Manager if you need to stop it.

Troubleshooting

1. In History, filter to **Scheduled** and note the job's **Schedule Id** (right-click a column header and use Show Column Chooser if the column is hidden, or use **Copy** on the row menu).
2. Open Windows **Task Scheduler**. The task name contains the Schedule Id. Check the trigger, the last run time and result, and the account the task runs as.
3. Review the scheduler logs:

```
%APPDATA%\Cognillo\SharePoint Essentials Toolkit\Logs\Scheduled Jobs
```

4. Once the job itself starts, its own log is written with the other job logs:

```
%APPDATA%\Cognillo\SharePoint Essentials Toolkit\Logs
```

PowerShell and Command Line

Any job that exists in History, and any template that has sites, can be run from PowerShell or a command prompt. The application runs headless, writes progress to the console, and records the run in History.

Syntax

Run a job from History by its job ID:

```
& "C:\Program Files\Cognillo\SharePoint Essentials Toolkit\SharePoint Essentials Toolkit.exe" --run-job "<job-guid>"
```

Run a template by name, optionally overriding the sites with a single URL:

```
& "C:\Program Files\Cognillo\SharePoint Essentials Toolkit\SharePoint Essentials Toolkit.exe" --run-template "Weekly permissions" -url "https://contoso.sharepoint.com/sites/hr"
```

If **-url** is omitted the template's own sites are used; a template without sites and without -url will not run. Adjust the path if the toolkit was installed elsewhere.

Copying the command

You do not have to build the command by hand. In **History** or **Templates**, open the row menu, choose **Copy** and pick the PowerShell command; paste it into a PowerShell window or a script.

Bulk execution

To run many jobs, export the job IDs from History (Export button; show the Job Id column with the Column Chooser if needed) or the template names from Templates, then loop over them in a script. Templates and scheduled jobs are easier to maintain than History jobs because their settings can be edited.

Logs

Logs for PowerShell runs are written here, and the job's own log alongside the other job logs:

```
%APPDATA%\Cognillo\SharePoint Essentials Toolkit\Logs\PowerShell Jobs
```


Getting Help

- **Online documentation and user guides** - <https://www.cognillo.com/support>.
- **Installation and Deployment Guide** - installation, app registration, certificate sign-in, user activity setup, sensitivity labels and Microsoft 365 Archive, proxy and offline activation.
<https://apps.cognillo.com/storage/documents/essentials/SharePointEssentialsToolkit-InstallationDeploymentGuide.pdf>
- **Support** - [Submit a Support Ticket | Cognillo](#) or email support@cognillo.com. Use the support portal for critical/urgent tickets. Include the job log (History > Open log, or Enable Detailed Logging and re-run) and the toolkit version shown under About.
- **Sales and licensing** - [Submit a Support Ticket | Cognillo](#) and choose Pre-sales or Procurement support.