KNOWLEDGE BASE ARTICLE

How to Export Policy Compliance Assignments to Excel

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Compliance Dashboard exports the assignments in its selected scope to an Excel workbook. Use the file for operational follow-up, reconciliation or further analysis. It is a tabular assignment report, not a PDF report, a chart export or a complete copy of the acknowledgement evidence log.

Set the export scope

1 Open Compliance Dashboard with reporting access.
2 Confirm whether the page is restricted to particular categories or one policy.
3 Select a department or leave the all-departments option.
4 Set **Status as of the selected date** to the intended reporting day.
5 Review the displayed scope before selecting **Export to Excel**.

Author ownership filtering and the page's policy restrictions apply to the export. Assignments that did not exist on the selected date are omitted. The export is not limited only to overdue rows or visible matrix cells; it includes the assignment rows selected by the export's policy, department and date logic.



Confirming filters before downloading assignment data

Inspect the workbook

The downloaded filename starts with `PolicyCompliance_` and includes the selected date. The workbook has a bold header, frozen first row and an autofilter. Blank source values are exported as empty cells.

Column	Content
Employee	Stored employee display name.
Account	Employee account identifier.
Department	Department stored on the assignment.
Manager	Stored manager account.
Policy	Policy title.
Version	Assignment version number.
Status	Calculated status on the selected date.
Assigned	Stored assignment date.

Column	Content
Due date	Stored deadline.
Acknowledged at	Stored acknowledgement date, if present.

The sheet name is based on the localized dashboard title and is limited to the workbook's supported name length. Date cells retain date values; Excel's display and the environment can affect how they appear. Verify any date formatting you change during downstream analysis.

Understand historical exports

Status is recalculated for the selected day, but the other exported date fields come from the current assignment record. A person who confirmed after that day can therefore have a historical assigned/overdue status and a later acknowledgement date in the same row. This is not automatically an inconsistent export; it reflects the two different meanings.

Exempt and paused assignment rows can appear even though those states are excluded from the main compliance denominator. Recompute percentages using the product's rules rather than dividing all exported acknowledged rows by every row indiscriminately. See KB10531. How Policy Compliance Is Calculated for a Selected Date.

Verify download and logging

Open the workbook, check a known employee and policy, confirm the date scope and compare the row population with the intended filters. Retain the report date and filters when sharing it, and use the organization's rules for employee information.

Note

The product downloads the workbook before writing its report-export audit event. An account without permission to write that event can encounter a later logging failure even though the file was already generated. Check the downloaded file and ask an administrator to inspect logging instead of assuming every error means no export occurred.

The file does not include the full confirmation statement, record hash, typed-name

field or all event history. Use receipts and evidence inspection for those questions. The administrative audit export is a separate operation described in KB10534. How to Review and Export the Policy Audit Log.