Your Policy. Our Automation. SharePoint as a Service Redefined.

ACCOUNTABILITY & SECURITY RECERTIFICATION

- **Site and Site Collection Directory** – Provides an up-to-date list of business owners for each site and site collection. This provides transparency in content ownership and administration responsibilities.
- **Permissions Recertification** – Site contacts are automatically assigned a task to review all user permissions for their sites on a custom schedule. Changes to permissions can be made directly in the task before certifying compliance with organizational security policy.
- **Full Auditing** – All permissions changes by all users involved in the recertification process are tracked and historical versions recorded to ensure accountability as well as traceability.

APPROVAL PROCESS

- **Multi-stage Approval Process** – Up to three stages of approvals with role-based assignment and escalation can be used for all provisioning, content management, and permissions management services.
- **Timed Escalation** – Designate an alternate approver to take over tasks that have not been resolved after a designated period of time.
- **Zero-Stage Approval Process** – Automatically process services that do not need approval. This ensures compliance with policies and ensures all services are audited.

DOCAVE SOFTWARE PLATFORM INTEGRATION

- **Automatic Provisioning** – Automatically apply appropriate backup, permissions, and lifecycle management policies to sites or site collections upon creation through automated policy assignment based on the requested service level.
- **Policy Enforcer Integration** – Automatically adjust unauthorized changes and configurations in features, permissions, and settings by applying more than 35 configurable Policy Enforcer rules and profiles to provisioned site collections.

SHAREPOINT INTEGRATION

- **Access Denied Redirect** – Reroute SharePoint access requests to Governance Automation. This approval process provides complete insight into permission changes.
- **Site Information Card (SharePoint 2013)** – Displays associated Governance Automation information such as site contact, lease quota, as well as all available services.
- **Policy Bar (SharePoint 2013)** – Visual indication within sites showing associated policy and service level.
INFORMATION ARCHITECTURE EXTENSIBILITY & CUSTOMIZATION

- **Client API** – Bridge the gap between existing IT service management systems, external workflow systems, and SharePoint.
- **External Workflow Integration** – Use third party workflows, such as Nintex and K2, with Governance Automation policies and audited services.
- **SDK** – Create custom Policy Enforcer rules or profiles. Integrate them into more than 40 different event triggers using our Rules Software Development Kit (SDK).
- **Automatic Content Database Allocation & Creation** – New site collections are automatically allocated the pre-designated content database, and new content databases are created automatically as needed.

SIMPLIFIED REQUEST MANAGEMENT & QUESTIONNAIRE

- Customizable request questionnaires gather end-user information, such as their role and associated permission levels, and business needs to guide them to the service form they need. This ensures that users only access services available to them, applying the right policies while simplifying the service catalog.

SCALE SHAREPOINT POLICY CONFIGURATION

- Define policies, metadata, approval processes, permissions, and auditing parameters associated with SharePoint management tasks for site provisioning as well as content and permissions management. Existing sites and site collections can have governance policies retroactively applied. This allows IT management to align all services to corporate governance policies.

SITE AND SITE COLLECTION DIRECTORIES

- A list of all sites and site collections along with their business and IT contacts, classification, and storage usage of site collections and sites. This gives IT administrators insight into usage trends and helps IT determine a proper chargeback model, while instilling accountability to the business owners.

SUPPORTED ENVIRONMENTS

- Fully supports SharePoint 2013, SharePoint 2010, SharePoint Online – both multi-tenant and dedicated SharePoint Online instances – SharePoint Foundation releases, and hybrid environments.

Supported Service Request Types:

SHAREPOINT PROVISIONING

- **Create Site/Site Collection** – Automatically provision policy-based SharePoint sites, site collections, lists, libraries, and My Sites.
- **Policy Enforcer Integration** – Automatically apply Policy Enforcer profiles and associated rules upon provisioning of sites and site collections. Unauthorized changes and configurations in features, permissions, and settings will be automatically adjusted back based on the preconfigured rules.
- **Site and Site Collection Import** – Scan existing sites and site collections not currently managed by Governance Automation into an Excel export file, and then select relevant sites and provide policy as well as site contacts to deploy in Governance Automation.
- **Site Contact** – Configure Primary and Secondary Contacts for relevant sites to enforce site ownership and accountability.
- **Dead Account Cleaning** – Remove or transfer SharePoint permissions of deleted or deactivated Active Directory users with Dead Account Cleaner.

- **DocAve Deployment Manager Integration** – Ensure consistency across site collections by deploying gallery artifacts – such as content types, web parts, themes, and list templates – as sites are provisioned.

- **Central Policy Management** – Centralize and reuse policy definitions to enhance consistency across service requests for storage management, site leases, and inactivity with flexible policy wizard creation.

- **Managed Metadata Service Integration** – Enforce corporate taxonomy with the ability to integrate with Managed Metadata Service.

- **Auto-URL Generation** – Standardize URL formats across the SharePoint environment.

- **Temporary Permissions** – Assign users with custom or temporary permission levels during site and site collection provisioning and automatically remove permission on set expiration date.

- **Site Quota Change Service** – Change site quota as needed to minimize initial allotment and total cost of ownership.

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**SHAREPOINT LIFECYCLE MANAGEMENT**

- **Inactivity and Lease Expiration Alerts** – Notifies business owners when their sites have not been accessed for a specific period of time, or if the site lease is about to expire. This helps reduce unnecessary storage by giving site owners the ability to end-of-life their sites, and archive as a record on lower-tiered storage.

- **Site and Site Collection Directory** – A list of all sites and site collections along with their business and IT contacts, classification, and storage usage of site collections and sites. This gives IT administrators insight into usage trends and helps IT determine a proper chargeback model, while instilling accountability to the business owners.

- **Site Collection Provisioning Services** – Services for managing site collections. This allows business owners to make changes to classification and policy, extend site lease and site quota, move content, and adjust permissions.

- **Site Provisioning Services** – Services for managing sites. This allows business owners to delegate site management, providing end-users the ability to make changes to classification and policy, extend site lease and site quota, move content, and adjust permissions to sites they use daily.

- **Reporting** – Generate .csv or .xslt reports to provide charge back calculations to your departments or functional units.

- **Permissions Recertification** – Automatically assign a task to site collection business owners to make sure permissions to each site or site collection are correct throughout its lifecycle.

- **Audited Recertification** – All permissions changes by all users involved in the recertification process are tracked and historical versions recorded to ensure accountability.

- **Policy Enforcer Integration** – Automatically apply Policy Enforcer profiles and associated rules upon provisioning of sites and site collections. Unauthorized changes and configurations in features, permissions, and settings will be automatically adjusted back based on the preconfigured rules.

- **Content Management Auditing** – Track and audit all requests for copying, moving, and restructuring content.

- **Multi-stage Approval Process** – Up to three stages of approvals with role-based assignment and escalation can be used for all provisioning, content management, and permissions management services.

- **Automated Ownership Process** – Automatically identify data owners. Ensure contacts are accurate and up to date to drive lifecycle decisions via a multi-stage ownership nomination process.
- **SharePoint Web Part** – Use an intuitive browser-based UI or web part within SharePoint to migrate and restructure SharePoint content within or across all farms, servers, and different locations with full fidelity.

- **List and Library Support** – Maintain list and library integrity with full support for all list types – including document libraries, issues lists, discussion threads, and announcements – as well as content metadata and configurations.

- **End-user Content Management** – Promote or demote sites, or copy content from multiple sources to multiple destinations – from list to list, library to library, or site to site – across multiple SharePoint environments.

- **User Driven Migration** – Create service requests that enable relevant power users to easily migrate all business-critical content to the latest version of SharePoint Server or Office 365.

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### SHAREPOINT SECURITY

- **Full auditing** – Track and audit all requests and permissions changes.

- **Access Denied Redirect** – Reroute SharePoint access requests to Governance Automation’s Grant Permissions Service so all permission changes and approvals are fully audited.

- **Permissions Management Services** – Grant, transfer, or clone custom permission assignments directly or optionally enforce user permissions assignment through SharePoint group membership.

- **Grant Permissions Level Control** – Set permission level limits for site collection and site provisioning services, as well as Grant Permission services to granularly enforce permission control.

- **Grant Permissions Services** – Enable business users to request permissions to a specified SharePoint object with approval processes and automated assignment upon final approval.

- **Temporary Permissions Services** – Temporarily grant users and/or groups access to sites based on end user request for a specified period of time before automatically expiring.

- **Permissions Recertification** – Automatically assign a task to site collection business owners to make sure permissions to each site or site collection are correct throughout its lifecycle.

- **Dead Account Cleaner** – Enforce dead account cleaning to remove or transfer permissions of deactivated users. Select and preview permissions associated with a specific user to transfer, clone, or remove across multiple farms – prior to executing associated changes – in a single request.

- **Site Permissions Inheritance** – New sites automatically use permissions from the site or site collection in which they are created, including existing user groups. This proactively enforces existing security structures for ease of maintenance and administration.