DocAve®

Governance Automation Online

Business User Guide

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What’s New in this Guide

- General improvements for enhanced functionality.

About DocAve Governance Automation Online

Traditionally, administrators create components or manage their data in SharePoint Online 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.

DocAve Governance Automation Online is an online version of DocAve Governance Automation. DocAve Governance Automation Online supports the need for organizations to use Microsoft SharePoint as a service by automating the ways users request configurable services including, but not limited to: content management, lifecycle management, permissions management, and provisioning.

Governance Automation Online provides ways to create and govern your SharePoint Online 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 guide for business users explains how to create an application for a request and how to manage tasks in Governance Automation Online; if you are an administrator of Governance Automation Online, refer to the DocAve Governance Automation Online Administrator Guide.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Getting Started

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

Understanding Service Requests and Tasks

Your SharePoint Online administrator can create services which contain a set of configured settings for SharePoint Online 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 Online needs. Once you submit a service request, the approval process associated with each corresponding service will automatically notify the designated persons in your organization of your request. After all approvers of a service have approved the request, Governance Automation Online 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 Online. 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** on the upper-left corner to have the navigation bar be displayed on the top. You are able to go to your desired section by clicking the section name on the navigation bar. You can also click the pin ( ) button on the lower-right corner on the navigation bar to pin the navigation bar. The navigation bar will be displayed on the top until you click the unpin ( ) button.

***Note**: Only the features that are activated by the IT Admin are visible.

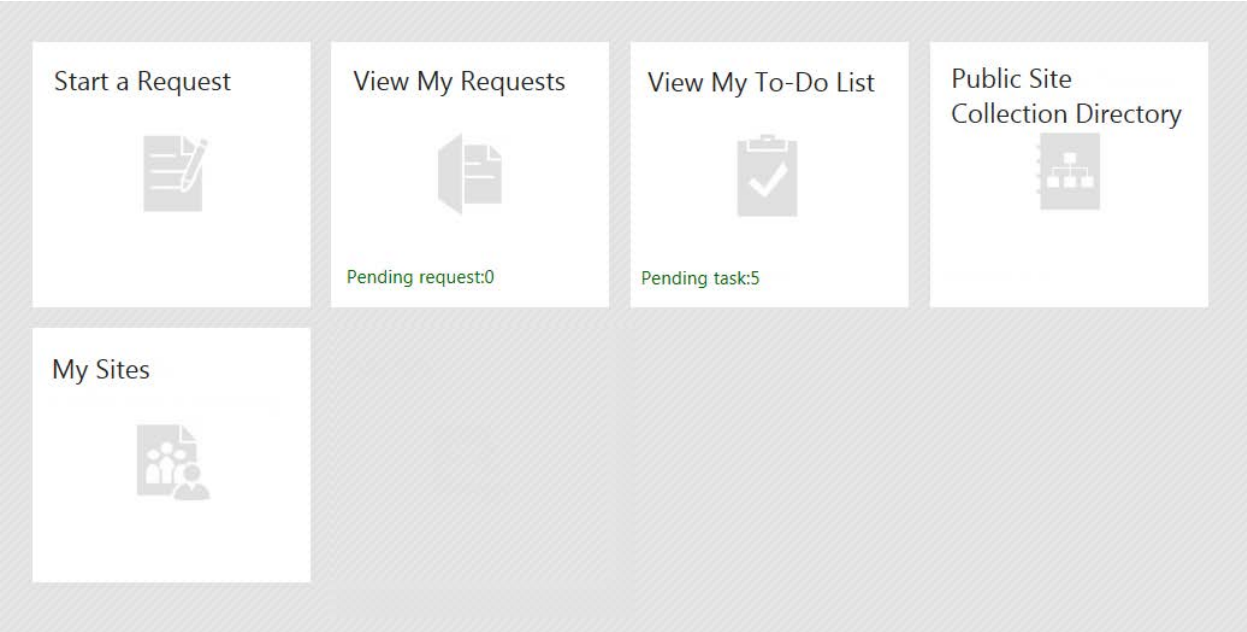

Figure 1: The business user landing page.

Starting a Request

To start a request for a service, click **Start a Request** on the landing page of the Governance Automation Online interface. You will be brought to the **Start a Request** interface, where all of the available services are displayed in your service catalog.

In the **Start a Request** interface:

1. Select a service by clicking the service name.
2. Enter the necessary information in the configuring service request interface.
3. When completing the configurations, choose one of the following options:
    - Click **Save As Draft** to save the request as a draft and leave the configured settings for later use.
    - Click **Save and Submit** to submit this request to the approvers.
    - Click **Cancel** to return to the **Start a Request** interface without saving any configurations.

Searching and Filtering Requests

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

You can also filter services by language. Click the language filter icon on the top of the screen and select the checkboxes next to the language names to filter by those languages.

Managing Your Requests

In the **My Requests** screen, all of your service requests are displayed, including **Submitting and Submitted Requests** that are still awaiting approval and **Saved Requests** that have already been approved or rejected.

To manage the requests, click **View My Request** in the landing page. Select the **Submitting and Submitted Requests** or **Saved Requests** tab in the **View My Requests** page to access the corresponding request type.

Submitted Requests

All of the requests that you have submitted are displayed in the **Submitting and Submitted Requests** tab. To change the number of submitting and/or submitted requests displayed per page, select the desired number from the **Show rows** drop-down menu in the upper-right corner. To sort the submitting and/or submitted requests, click the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the submitted requests are displayed in the following ways:

- Search – Filters displayed service requests by your keyword. You can search service requests using the following columns: Service Request, Service, and Assign To. Only the content in the column displayed in the current view can be searched.
- Manage columns ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Filters which item in the list is displayed. Click the filter item ( ) button next to the column name you want to filter, and then select the checkbox next to the item name to have that item shown in the list.

You can perform the following actions on submitting and/or submitted requests:

- View Details – Click a request summary of a submitted request to see more information. Close the interface to return to the **My Requests** interface.
- **Copy** – Duplicate the existing service request to make minor changes in order to submit as a new service request. Select a submitted request or a request whose status is **Did Not Pass Request Validation**. Click **Copy** on the ribbon, and make the desired modifications.

  When you have finished making changes,

  - Click **Save As Draft** to save the new service request as a draft.
  - Click **Save and Submit** to submit this request to the approvers.

    - Click **Cancel** to return to the **My Requests** interface without saving any configurations.

- **Cancel Request** – Select a submitted request that you wish to cancel and click **Cancel Request** on the ribbon.

Saved Requests

In the **Saved Requests** tab, all of the requests that you have saved without submitting are displayed. 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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the saved requests are displayed in the following ways:

- Search – Filters displayed service requests by your entered keyword. You can search desired service requests using the following columns: Service Request and Service. Only the content in the column displayed in the current view can be searched.
- Manage columns ( ) – Manages which columns are displayed in the list. Click the managed columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Filters which item in the list is displayed. Click the filter items ( ) button next to the column name you want to filter, and then select the checkbox next to the item name to have that item shown in the list.

You can perform the following actions on saved requests:

- View Details – Click a request summary to see more information.
- **Edit** – Select a saved request by clicking the select ( ) button before a service request summary, and click **Edit** on the ribbon to edit the settings of this request. When you have completed editing the configurations, click **Save** to save all of the settings, click **Save and Submit** to submit this request to the approvers, or click **Cancel** to return to the **My Requests** interface without saving any configurations.
- **Delete** – Select a request by clicking the select ( ) button before a service request summary, and click **Delete** on the ribbon. A confirmation window appears. Click **OK** to delete the selected request, or click **Cancel** to return to the **My Requests** interface without deleting the selected request.
- **Copy** – Duplicate the existing service request to make minor changes in order to submit as a new service request. Select a submitted request. Click **Copy** on the ribbon, and make the desired modifications.

  When you have finished making changes,

    - Click **Save As Draft** to save the new service request as a draft.

- Click **Save and Submit** to submit this request to the approvers.
- Click **Cancel** to return to the **My Requests** interface without saving any configurations.

Managing Your To-Do List

When a service request is submitted and you are one of the approvers of this request, a task will be assigned to you. When you are the approver of a permission recertification process and the recertification schedule reaches, a permission recertification report will be assigned to you.

To manage your tasks and permission recertification reports, click **View My To-Do List** in the landing page.

My Tasks

In the **My Tasks** tab, all of the tasks assigned to you are displayed. 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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the tasks are displayed in the following ways:

- Search– Filters displayed Tasks by your entered keyword. You can search desired Tasks by the following columns: Title and Requester. Only the content in the column displayed in the current view can be searched.
- Manage columns ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Allows you to filter which item in the list is displayed. Click the filter items ( ) button of the column you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Approving or Rejecting Requests

You can approve or reject the following types of requests:

- Create Site Collection
- Create Site
- Create Library/List
- Create User
- Create Group
- Deploy Patterns
- Site Collection Lifecycle Management – Archive Site Collection
- Site Collection Lifecycle Management – Delete Site Collection

- Site Collection Lifecycle Management – Extend Site Collection Lease
- Site Collection Lifecycle Management – Change Site Collection Policy
- Site Collection Lifecycle Management – Change Site Collection Quota
- Site Collection Lifecycle Management – Unlock Site Collection
- Site Collection Lifecycle Management – Lock Site Collection
- Site Lifecycle Management – Archive Site
- Site Lifecycle Management – Delete Site
- User Lifecycle Management – Offboard Office 365 User
- User Lifecycle Management – Extend Office 365 User Contract
- User Lifecycle Management – Change Office 365 User Policy
- User Lifecycle Management – Unlock Office 365 User
- Group Lifecycle Management – Delete Office 365 Group
- Group Lifecycle Management – Extend Office 365 Group Lease
- Group Lifecycle Management – Change Office 365 Group Policy
- Group Lifecycle Management – Change Office 365 Group Team Site Quota
- Change Site Collection Contact or Administrator
- Change Site Collection Settings
- Change Site Contact
- Change Site Settings
- Change Library/List Settings
- Change User Properties
- Change Group Settings
- Content Move
- Change Permissions
- Grant Permissions
- Clone or Transfer User Permissions

1. Click a request summary to view more information about the request. The **View Details** window appears.
2. In the **View Details** window, you have the following options:
    - **Edit Request** – Click **Edit Request** on the ribbon to edit all of the settings of this request in the **Edit Request** window.

***Note**: This button is only visible to the approvers when **Allow approvers to edit this service request** is selected in the corresponding service.

- **View Request History** – Click **View Request History** to view the versions of this request in the **View Request History** window.

3. Click **Approve** or **Reject** on the ribbon. Enter any comments you may have in the pop-up window.
4. Click **OK** to confirm or click **Cancel** to return to the **My Tasks** page without executing the task.

Reassigning Tasks

You can reassign a task to another approver if **Allow approvers to reassign tasks to others** is enabled in the approval process. All types of tasks, except for election tasks, can be reassigned. To reassign a task, follow the steps below:

1. Select a task, and click **Reassign** on the ribbon.
2. In the pop-up window, enter the name of a user or group that will become the approver.
3. Click **OK** to confirm.

Managing Automatic Site Collection Lifecycle Management Tasks

When a site collection's inactivity threshold or lease period is exceeded, a Site Collection Lifecycle Management task is automatically generated and assigned to the approver. For the automatically generated tasks, besides the basic task information, you can view the **Lifecycle Action History** field to view the chosen lifecycle actions of the previous approval stages. Only the last approver's chosen lifecycle action will take effect. You can perform the following actions on the automatic Site Collection Lifecycle Management task. Note the following:

- These actions will be available only when the corresponding lifecycle actions are enabled in site collection policies and when the built-in Site Collection Lifecycle Management services are active.
- If **Yes/No (check box)** metadata with the **Enable Terms and Conditions Agreement** option enabled has been added to a built-in Site Collection Lifecycle Management service, you must choose **Yes** as the value for this metadata, when you manage the lifecycle of the site collection. Otherwise, the lifecycle action cannot be performed to the site collection.

Perform the following actions on the automatic Site Collection Lifecycle Management task:

- **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.

- **Archive** – Select a task, and click **Archive** on the ribbon to execute the site collection archival task. If metadata has been added to the Site Collection Lifecycle Management - Archive Service, the **Archive Site Collection** window will appear. In the pop-up window, you can enter comments for the site collection archival and modify the metadata values. Then, click **Submit** and a pop-up window appears asking you to confirm the site collection archival. Click **OK** to confirm the action, or click **Cancel** to return to the **All Tasks** interface.
- **Extend** – Select a task, and click **Extend** on the ribbon to extend the lease for the site collection in this task. The **Extend Site Collection Lease Period** window appears. In the pop-up window, you can enter comments for the site collection lease extension. The lease extension period is displayed if the IT Admin has defined it; if the field is available to configure, define the amount of time to extend the lease period. Enter a number in the text box, then, select a time unit from the drop-down menu.

  If metadata has been added to the Site Collection Lifecycle Management – Extend Service, you can modify the metadata values. Then click **Submit** and a pop-up window appears asking you to confirm the site collection lease extension. Click **OK** to confirm this action, 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. If metadata has been added to the Site Collection Lifecycle Management – Delete Service, the **Delete Site Collection** window will appear. In the pop-up window, you can enter comments for the site collection deletion, and modify the metadata values. Then, click **Submit** and a pop-up window appears asking you to confirm the site collection deletion. 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. The **Change Site Collection Policy** window appears. In the pop-up window, you can enter comments for the site collection policy change, and select a site collection policy that you want to apply to the site collection from the drop-down list. If metadata has been added to the Site Collection Lifecycle Management – Change Policy Service, you can modify the metadata values. Then, click **Submit** and a pop-up window appears asking you to confirm the site collection policy change. Click **OK** to confirm the action or **Cancel** to return to the **My Tasks** interface.

Managing Automatic User Lifecycle Management Tasks

When the contract term of an Office 365 user has expired or the last contract extension has expired, a User Lifecycle Management task is automatically generated and assigned to the approver. You can perform the following actions on the task:

- **Extend** – Select the task and click **Extend** on the ribbon. A pop-up window appears.
  i. The extended user contract term is displayed if your IT Admin has configured it. If allowed, you can define the extended user contract term.

ii. Enter some comments about this task for further reference.

iii. Click **OK** to finish this task, or click **Cancel** to return to the **My Tasks** interface without executing the task.

- **Offboard** – Select the task and click **Offboard** on the ribbon. A pop-up window appears. Choose one of the following options:

  - **Delete the Office 365 user**

    If you choose this option, you must change the administrator of this deleted user's OneDrive for Business. Enter a username in the text box and click the check ( ) button to check that the name is valid. You may also click the browse ( ) button to search for users.

    Click **OK** to finish this task, or click **Cancel** to return to the **My Tasks** interface without executing the task.

  - **Block the Office 365 user**

    If you choose this option, you must assign a user who will receive a copy of e-mails sent to this blocked user. Enter a username in the text box and click the check ( ) button to check that the name is valid. You may also click the browse ( ) button to search for users.

    Click **OK** to finish this task, or click **Cancel** to return to the **My Tasks** interface without executing the task.

  - **Reset the Office 365 user's password**

    If you choose this option, you must assign a user who will receive the new password. Enter a username in the text box and click the check ( ) button to check that the name is valid. You may also click the browse ( ) button to search for users.

    Click **OK** to finish this task, or click **Cancel** to return to the **My Tasks** interface without executing the task.

Managing Automatic Group Lifecycle Management Tasks

When the lease of an Office 365 group has expired or the last lease extension has expired, a Group Lifecycle Management task about group lease expiration is automatically generated and assigned to the approver. You can perform the following actions on the task:

- **Delete** – Select the task and click **Delete** on the ribbon. 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.
- **Extend** – Select the task and click **Extend** on the ribbon. A pop-up window appears.

i. The extended group lease period is displayed if your IT Admin has configured it. If allowed, you can define the extended group lease period.

ii. Enter comments about this task for further reference.

iii. Click **OK** to finish this task, or click **Cancel** to return to the **My Tasks** interface without executing the task.

Change and Clone or Transfer Permissions Tasks

You can perform the following actions on the tasks from Change Permissions and Clone or Transfer User Permissions services:

- View Task – Click a task title to see detailed information. In the **View Details** interface, you have the following options:
  - **Submit** – Click **Submit** on the ribbon to finish this task.
  - **Reject** – Click **Reject** on the ribbon to reject this task.
  - **Review the Report** – Review detailed report of this task. Choose one of the following options:
- **View on screen** – Open the report directly to view details on screen. If you view details of a Change Permissions task, refer to Reviewing Permissions.
- **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.
  - **Edit Request** (This button is only visible to the approvers when **Allow approvers to edit this service request** is selected in the corresponding service) – Click **Edit Request** on the ribbon to edit all of the settings of this request in the **Edit Request** interface.
  - **View Request History** – Click **View Request History** to view the versions of this request in the **View Request History** interface.
- **Submit** – Select a task, and click **Submit** on the ribbon to submit 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.
- **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.

Reviewing Permissions

If you view details of a Change Permissions task, you can perform the following actions:

- **Filter Records** – Select **User Based** or **Object Based** from the drop-down list in the top left-hand corner. By default, **All Results** is selected.

- **Submit** – Click **Submit** on the ribbon to submit the task and apply all of your configurations to SharePoint.
- Reset – Click Reset on the ribbon to select Reset My Changes or Reset All Changes.
    - **Reset My Changes** – Your changes on the task will be cleared.
    - **Reset All Changes** – All users' changes on the task will be cleared.
- **Export Report** – Click **Export Report** on the ribbon to export the permission review report. In the **Export Report** window, choose to export the report to local machine or export the report to an export location, and select a report format (**CSV** or **XLS**). Then, click **Export to Datasheet** to export the report.
- **Edit User Permissions** – Select a user and click **Edit User Permissions**. In the **Edit Permissions** interface, modify the permission levels in the **Permissions** section. Then, click **Save** on the ribbon to save your changes and go back to the **View Details** page. The edited record is highlighted.
- **Remove User Permissions** – Select a user and click **Remove User Permissions**. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the user's permissions.
- **Delete User** – Select a user and click **Delete User**. A pop-up window appears which asks you to confirm your deletion. Click **OK** to delete the selected user.
- **Edit Group Permissions** – Select a group and click **Edit Group Permissions**. In the **Edit Permissions** interface, modify the permission levels in the **Permissions** section. Then, click **Save** to save your changes and go back to the **View Details** page. The edited record is highlighted.
- **Remove Group Permissions** – Select a group and click **Remove Group Permissions**. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the group's permissions and go back to the **View Details** page. The edited record is highlighted.
- **Delete User** – Click the display name of a group and you are brought to a new window. Select one or more group users and click **Delete User** on the ribbon. A pop-up window appears which asks you to confirm your deletion. Click **OK** to delete the selected users.
- **Remove User From Group** – Click the display name of a group and you are brought to a new window. Select one or more group users and click **Remove User From Group** on the ribbon. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the selected users from the group.
- **Change Group** – Click the display name of a group and you are brought to a new window. Select one or more group users and click **Change Group** on the ribbon.
    - In the **Change Group** interface, select the group that you wish to change to and select the method for changing group, **Copy** or **Move**. Copy will copy the users to the new group. **Move** will remove the users from the previous group and then add the users to the new group. Click **Save** to save your changes and go back to the **View Details** page. The edited record is highlighted.

Managing Manual Archive Tasks

When there is site collection content that meets the Archiver rule, a manual archiver task will be generated. You can perform the following actions to the manual archive tasks:

- **View Task** – Click a task title to see detailed information. In the View Details window, you can perform the following actions:
    - **Submit** – Click **Submit** on the ribbon to submit the site collection content archival task. Enter comments in the pop-up window, then, click OK to submit the task or click Cancel to return to the View Details window without making any changes.
    - **Reassign** – Click **Reassign** on the ribbon to reassign the site collection content archival task. Enter the username of the user to whom to you want to reassign the task in the pop-up window, then, click **OK** to reassign the task or click **Cancel** to return to the **View Details** window without making any changes.
    - **Review** – Click **Review** on the ribbon, and the **Review the Report** window appears. By default, all objects in the report will be archived.
        - If you do not want to archive a specific object, select **Reject** from the drop-down list under the **Action** column of the object.
        - If you do not want to archive some of these objects, select the objects and click **Reject** on the ribbon.

      When you finish, click **Finish** on the ribbon to confirm your action or click **Cancel** to return to the **View Details** window without making any changes.
- **Reassign** – Select a site collection content archival task and click **Reassign** on the ribbon to reassign the task. Enter the username of the user to whom you want to reassign the task in the pop-up window. Then, click **OK** to reassign the task or click **Cancel** to return to the **All Tasks** page without making any changes.

Election Tasks: Triggered from Site Collection Report

When an election process is started in a **Site Collection Report**, an election task is generated and assigned to the nominees.

You can perform the following actions on an election task:

- View Task – Click a task title to see detailed information. In the **View Details** page, you have the following options:
    - **Claim** – Click **Claim** to become the primary site collection contact. In the pop-up window, define a user as the secondary site collection contact by entering a username in the text box. Then, click **OK** to save your configurations.
    - **Decline** – Click **Decline** to decline to become the primary site collection contact. A pop-up window appears to ask for your confirmation. Click **OK** to confirm your action.

- **Claim** – Select a task and click **Claim** to become the primary site collection contact. In the pop-up window, define a user as the secondary site collection contact by entering a username in the text box. Then, click **OK** to save your configurations.
- **Decline** – Select a task and click **Decline** to decline to become the primary site collection contact. A pop-up window appears to ask for your confirmation. Click **OK** to confirm your action.

Election Tasks: Deactivated Contact Election for Site Collection

The deactivated contact election will be enabled on a site collection, when a site collection policy with the **Automatically start the ownership election process if either of the site collection contact is deactivated** feature enabled is applied to the site collection. If the primary site collection contact is deactivated, refer to Election Tasks: Triggered from Site Collection Report. If the secondary site collection contact is deactivated, a deactivated contact election task will be generated and assigned to the primary site collection contact. The primary site collection contact can perform the following actions on the deactivated contact election task:

- **View Task** – Click a task title to see the task details. In the **View Details** page, click **Specify Secondary Contact** to directly define a user as the secondary site collection contact by entering their username in the text box. Then, click **OK** to save the configurations.
- **Specify Secondary Contact** – Select a task and click **Specify Secondary Contact** to directly define a user to be the secondary site collection contact. In the pop-up window, define a user as the secondary site collection contact by entering their username in the text box. Then, click **OK** to save the configurations.

My Recertification Report

My Recertification Report is a report of recertification tasks that are assigned to you. In the **My Recertification Report** tab, all of the permission recertification tasks, metadata recertification tasks, ownership recertification tasks, and membership recertification tasks are displayed.

You may 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 corner. To sort the reports, click the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- Search – Allows you to filter reports displayed by the keyword you designate. The **Request Summary** column supports being searched, and only the content in the column displayed in the current view can be searched.
- Manage Columns ( ) – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click the manage columns ( ) button,

then select the checkbox next to the column name to have that column shown in the list.

- Filter ( ) – This allows you to filter which item in the list is displayed. Click the filter ( ) button of the column you want to filter, and then select the checkbox next to the item name to have that item shown in the list.

Permission Recertification Tasks

When a recertification profile with the permission recertification enabled is selected in a site collection policy and the site collection policy is applied to a Governance Automation Online managed site collection, a permission recertification task will be generated for the site collection. This task contains the searched permissions of users and groups for this site collection. Approvers can then modify the permissions in Governance Automation Online and the permission changes will be updated to SharePoint Online.

When a recertification profile with permission recertification enabled is selected in an Office 365 group policy and the Office 365 group policy is applied to a Governance Automation Online managed Office 365 group, a permission recertification task will be generated for the Office 365 group. This task contains the searched user permissions and SharePoint group permissions to the corresponding group team site. Approvers can then modify the permissions in Governance Automation Online and permission changes will be updated to Office 365.

You can perform the following actions on the permission recertification report:

- View Report – Click a request summary to see detailed information. In the report details page, you have the following options:
    - Filter Records – Select **User Based** or **Object Based** from the drop-down list in the top left-hand corner. By default, **All Results** is selected.
    - **Submit** – Click **Submit** on the ribbon to submit the changes and apply all of your configurations to SharePoint Online or to Office 365.
    - **Reset** – Click **Reset** on the ribbon to select **Reset My Changes** or **Reset All Changes**.
- **Reset My Changes** – Your changes on the report will be cleared.
- **Reset All Changes** – All users' changes on the report will be cleared.
    - **Export Report** (for site collection permission recertification tasks only) – Click **Export Report** on the ribbon to export the permission recertification report. In the **Export Report** window, choose to export the report to local machine or export the report to an export location, and select a report format (**CSV** or **XLS**). Click **Export to Datasheet** to export the report.
    - **View History** – Click **View History** to view the previous versions of the report.

- **Delete User** – Select a user and click **Delete User**. A pop-up window appears which asks you to confirm your deletion. Click **OK** to delete the selected user, or click **Cancel** to not make any changes.
- **Edit User Permissions** – Select a user and click **Edit User Permissions** on the ribbon. In the **Edit Permissions** interface, modify the permission levels in the **Permissions** section. Then, click **Save** on the ribbon to save your changes and go back to the **View Details** page. The edited record is highlighted.
- **Remove User Permissions** – Select a user and click **Remove User Permissions**. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the user's permissions, or click **Cancel** to not make any changes.
- **Edit Group Permissions** – Select a group and click **Edit Group Permissions** on the ribbon. In the **Edit Permissions** interface, modify the permission levels in the **Permissions** section. Then, click **Save** to save your changes and go back to the **View Details** page. The edited record is highlighted.
- **Remove Group Permissions** – Select a group and click **Remove Group Permissions**. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the group's permissions and go back to the **View Details** page. The edited record is highlighted.
- **Delete User** – Click the display name of a group and you are brought to a new window. Select one or more group users and click **Delete User** on the ribbon. A pop-up window appears which asks you to confirm your deletion. Click **OK** to delete the selected users, or click **Cancel** to not make any changes.
- **Remove User From Group** – Click the display name of a group and you are brought to a new window. Select one or more group users and click **Remove User From Group** on the ribbon. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the selected users from the group, or click **Cancel** to not make any changes.
- **Change Group** – Click the display name of a group and you are brought to a new window. Select one or more group users and click **Change Group** on the ribbon.

  In the **Change Group** interface, select the group that you wish to change to and select the method for changing group, **Copy** or **Move**. Copy will copy the users to the new group. **Move** will remove the users from the previous group and then add the users to the new group. Click **Save** to save your changes and go back to the **View Details** page. The edited record is highlighted.

- **Submit** – Select a report and click **Submit** on the ribbon to submit changes of the report. Enter comments for this report for further reference in the pop-up window. Click **OK** to finish this report or click **Cancel** to return to the **My Recertification Report** interface.

Metadata Recertification Tasks

When a recertification profile with metadata recertification enabled is selected in a site collection policy and the site collection policy is applied to a Governance Automation Online managed site collection, a

metadata recertification task will be generated. This task contains the searched metadata of this site collection. Approvers can then modify the metadata values in Governance Automation Online and the metadata value changes will be updated to SharePoint Online.

You can perform the following actions on the metadata recertification task:

- View Task – Click a request summary to see detailed information. In the task details page, you have the following options:
  - **Edit** – Select a metadata name and click **Edit** on the ribbon. In the **Edit** window, modify the metadata value, then click **Save** to save your changes.
  - **Add** – If you are allowed to add metadata to the site collection, click **Add** on the ribbon. The **Add Metadata** window appears. Select a metadata name and click **Add to List** to add the new metadata.
  - **Delete** – If you are allowed to delete metadata from the site collection, select a metadata name and click **Delete** on the ribbon.
  - **Submit** – Click **Submit** on the ribbon to submit the changes and apply all of your configurations to SharePoint Online.
  - **Reassign** – Click **Reassign** on the ribbon to reassign the metadata recertification task to another user.
  - **Reject** – Click **Reject** on the ribbon to finish the metadata recertification task without making any changes.
  - **Reset** – Click **Reset** on the ribbon to select **Reset My Changes** or **Reset All Changes**.
    - **Reset My Changes** – Your changes on the task will be cleared.
    - **Reset All Changes** – All users' changes on the task will be cleared.
  - **View History** – Click **View History** on the ribbon to view the version history of the metadata recertification task.
  - **Review All Metadata** – Click **Review All Metadata** on the ribbon. A pop-up window appears displaying all searched metadata. Review the metadata and modify the metadata value if necessary. Then, click **Save** to save all changes.

    ***Note**: If you have changed any metadata values and you navigate to the **Review All Metadata** window again before you submit the task, the metadata with value changes will be marked with the **Edited** label.

- **Submit** – Select a task and click **Submit** on the ribbon to submit changes of the task. Enter 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 Recertification Report** interface.
- **Reassign** – Select a task and click **Reassign** on the ribbon to reassign the task to another user.

- **Reject** – Select a task and click **Reject** on the ribbon to reject the metadata recertification task.
- **Refresh** – Click **Refresh** on the ribbon to refresh the recertification task page.

Ownership Recertification Tasks

When a recertification profile with the ownership recertification enabled is selected in a site collection policy and the site collection policy is applied to a Governance Automation Online managed site collection, an ownership recertification task will be generated. This task is an election task. Approvers can claim or decline to become the primary site collection contact.

You can perform the following actions on the ownership recertification task:

- View Task – Click a request summary to see detailed information. In the task details page, you have the following options:
    - **Claim** – Click **Claim** to become the primary site collection contact. In the pop-up window, define a user as the secondary site collection contact by entering a username in the text box. Then, click **OK** to save your configurations.
    - **Decline** – Click **Decline** to decline to become the primary site collection contact. A pop-up window appears to ask for your confirmation. Click **OK** to confirm your action.
- **Claim** – Select a report and click **Claim** to become the primary site collection contact. In the pop-up window, define a user as the secondary site collection contact by entering a username in the text box. Then, click **OK** to save your configurations.
- **Decline** – Select a report and click **Decline** to decline to become the primary site collection contact. A pop-up window appears to ask for your confirmation. Click **OK** to confirm your action.
- **Refresh** – Click **Refresh** on the ribbon to refresh the recertification task page.

Membership Recertification Tasks

A membership recertification task will be generated when a recertification profile with membership recertification enabled is selected in an Office 365 group policy and the Office 365 group policy is applied to a Governance Automation Online managed Office 365 group. This task contains the searched members and/or owners of the Office 365 group. Approvers can add members and/or owners to the group, remove members and/or owners from the group, promote group members to group owners, or demote group owners to group members. The membership changes will be updated to Office 365.

You can perform the following actions on the membership recertification task:

- View Task – Click a request summary to see detailed information in the task details page. You have the following options:

- **Back** – Click **Back** on the ribbon to return to the **All Recertification Reports** page.
- **Submit** – Click **Submit** on the ribbon to submit the changes and apply all of your configurations to Office 365.
- **Reassign** – Click **Reassign** on the ribbon to reassign the membership recertification task to another user.
- **Reject** – Click **Reject** on the ribbon to finish the membership recertification task without making any changes.
- **Reset** – Click **Reset** on the ribbon to select **Reset My Changes** or **Reset All Changes**.
  - **Reset My Changes** – Your changes on the task will be cleared.
  - **Reset All Changes** – All users' changes on the task will be cleared.
- **View History** – Click **View History** on the ribbon to view the previous versions of the task.
- **Add Member** – Click **Add Member** on the ribbon and the **Add Member** window appears. Enter the username in the text box, then, click the check ( ) button to check that the username is valid. You may also click the browse ( ) button to search for users. Click **Add** to add the member to the group or click **Cancel** to not make any changes.
- **Add Owner** – Click **Add Owner** on the ribbon and the **Add Owner** window appears. Enter the username in the text box, then, click the check ( ) button to check that the username is valid. You may also click the browse ( ) button to search for users. Click **Add** to add the owner to the group or click **Cancel** to not make any changes.
- **Promote to Owner** – Select a group member and click **Promote to Owner** on the ribbon to promote the member to the group owner. The promoted users are highlighted.
- **Demote to Member** – Select a group owner and click **Demote to Member** on the ribbon to demote the owner to the group member. The demoted users are highlighted.
- **Remove from Group** – Select a group member or a group owner and click **Remove from Group** on the ribbon to remove the user from the group. The removed users are stroke through with a red line.

- **Submit** – Select a task and click **Submit** on the ribbon to submit changes of the task. Enter 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 Recertification Report** interface.
- **Reassign** – Select a task and click **Reassign** on the ribbon to reassign the permission recertification task to another user.
- **Reject** – Select a task and click **Reject** on the ribbon to finish the permission recertification task without making any changes.

- **Back** – Click **Back** on the ribbon to return to the **Settings** page.
- **Refresh** – Click **Refresh** on the ribbon to refresh the recertification task page.

Public Site Collection Directory

The Public Site Collection Directory is where business users go to view information on published site collections that are created and managed by Governance Automation Online. Site Collections with **Publish to Directory** metadata value **Yes** are considered published site collections. For more information about the **Publish to Directory** metadata, refer to the **Configuring Metadata** section of the DocAve Governance Automation Online Administration Guide.

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

Managing Public Site Collection Directory Reports

To change the number of 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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the directory reports are displayed in the following ways:

- **Search** – Filters the displayed directory reports by your entered keyword. You can search desired reports by the following columns: URL, Title, Description, Primary Site Collection Administrator, Secondary Site Collection Administrator, Additional Site Collection Administrators, Primary Site Collection Contact, Secondary Site Collection Contact, and metadata. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter items** ( ) – Filters which item in the list is displayed. Click the filter item ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Public Site Collection Directory Reports

To filter and generate public site collection directory reports, complete the following steps:

1. 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.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. If **Export to Datasheet** is visible, you can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting Public Site Collection Directory Reports

If you are allowed to export report, click **Export Report** on the ribbon to export the currently displayed site collections. For instructions about exporting the report, refer to Exporting Reports.

The Monitoring Reports Group

To view detailed information on all requests, tasks, and recertification reports, click **Settings** and then go to the **Monitoring Reports** group.

All Requests Page

The **All Requests** page centralizes all submitted service requests created by users.

To access the **All Requests** page, click **All Requests** in the **Monitoring Reports** group within **Settings**.

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 the sort ( ) button in a column heading, and then select **Ascending** or **Descending**.

You can customize how the requests are displayed in the following ways:

- **Search** – Filters displayed service requests by your entered keyword. You can search desired service requests by the following columns: Service Request, Service and Assign To. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter items** ( ) – Filters which item in the list is displayed. Click the filter items ( ) button next to the column name you want to filter, then select 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.

When finished, click **Back** to close the **Settings** interface.

All Tasks Page

The **All Tasks** page centralizes all tasks assigned to users.

To access **All Tasks**, click **All Tasks** in the **Monitoring Reports** group within **Settings**.

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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the tasks are displayed in the following ways:

- **Search** – Filters displayed tasks by your entered the keyword. You can search desired tasks by the following columns: **Title**, **Requester**, and **Assign To**. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter items** ( ) – Filters which item in the list is displayed. Click the filter items ( ) button next to the column name you want to filter, then select 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.

When finished, click **Back** to close the **Settings** interface.

All Recertification Reports Page

All Recertification Reports centralize all of the recertification tasks assigned to any users, providing you with one interface to process all recertification tasks.

To access **All Recertification Reports**, click **All Recertification Reports** in the **Monitoring Reports** group within **Settings**. To exit out of All Recertification Reports, click **Back**.

You can 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 corner. To sort the tasks, click the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the tasks are displayed in the following ways:

- **Search** – Filters displayed tasks by your entered keyword. You can search desired tasks by the following columns: **Request Summary**, **Requester**, and **Assign To**. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter items** ( ) – Filters which item in the list is displayed. Click the filter item ( ) button of the column you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Click a request summary to view detailed information of the recertification result.

The Audit Reports Group

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

- **User Activity Report** – Provides detailed information on all actions performed by Governance Automation Online users, including administrators and business users. Review the User Activity Report to inspect user actions, or check the legality of user behaviors.
- **Service Request Report** – Provides detailed information on all submitted service requests. The Service Request Report displays basic service request information such as service request, name, requester, status, submitted time, assignee, last updated time, and so on.
- **Approval Process Report** – Provides all service request approval process tracks once they are approved. Approval Process Reports can help you optimize your service request flow and make processes more efficient.

To access **Audit Reports**, go to the **Audit Reports** group in **Settings**.

User Activity Report Page

To access **User Activity Report**, click **User Activity Report** in the **Audit Reports** group. Click **Back** to close the **User Activity Report** interface.

Managing User Activity Reports

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 the sort ( ) button in the **Changed Time** column, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- **Search** – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **User** and **Object Instance Name**. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter items** ( ) – Filter which item in the list is displayed. Click the filter items ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating User Activity Reports

To filter and generate user activity reports, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Object**, **Type**, **Action**, **Time Range** and **User**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting User Activity Reports

To export the currently displayed reports, click Export Report on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Service Request Report Page

To access **Service Request Report**, click **Service Request Report** in the **Audit Reports** page. Click **Back** to close the **Service Request Report** interface.

Managing Service Request Reports

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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- Search – Filters displayed reports by your entered keyword. You can filter desired reports by the **following** columns: **Service Name**, **Request Summary**, **Requester** and **Assign To**. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter** items ( ) – Filters which item in the list is displayed. Click the filter items ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Service Request Reports

To filter and generate service request reports, complete the following steps:

1. 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**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting Service Request Reports

To export the currently displayed reports, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Approval Process Report Page

To access **Approval Process Report**, click **Approval Process Report** in the **Audit Reports** group. Click **Back** to close the **Approval Process Report** interface.

Managing Approval Process Reports

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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- **Search** – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **Request Summary** and **User**. Only the content in the column displayed in the current view can be searched.
- **Manage columns** ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- **Filter items** ( ) – Filters which item in the list is displayed. Click the filter items ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Approval Process Reports

To filter and generate approval process reports, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Service Type**, **Request Summary**, **Status**, **Time Range, Department**, and **User**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting Approval Process Reports

To export the currently displayed reports, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Administration Reports

Administration Reports provide basic information on all Site Collections and Sites created by Governance Automation Online:

- **Site Collection Report** – Provides a list of site collections created by Governance Automation Online along with details such as 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** – Provides a list of sites created by Governance Automation Online along with details such as 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.
- **User Report** – Provides a list of Office 365 users managed by Governance Automation Online and the corresponding information, including display name, username, roles, manager, location, user policy, user contract term expiration time, created , status, and so on. You can customize how the report displays the data via configurable criteria.
- **Group Report** – Provides a list of Office 365 groups managed by Governance Automation Online and the corresponding information, including group name, group ID, group owners, group policy, privacy, member subscription, group lease expiration time, created time, status, and so on. You can customize how the report displays the data via configurable criteria.

Site Collection Report Page

To access **Site Collection Report**, click **Site Collection Report** in the **Administration Reports** group. Click **Back** to close the **Site Collection Report** interface.

Managing Site Collection Reports

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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- Search – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **URL**, **Title**, **Description**, **Primary Site Collection Administrator**, **Secondary Site Collection Administrator**, **Additional Site Collection Administrator**, **Primary Site Contact**, **Secondary Site Collection Contact**, and metadata. Only the content in the column displayed in the current view can be searched.

- Manage columns ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Filters which item in the list is displayed. Click the filter item ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Site Collection Reports

To filter and generate site collection reports, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the 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.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information, refer to Exporting Reports.

Exporting Site Collection Reports

To export the currently displayed reports, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Applying a Site Collection Policy

In Site Collection Report, you can apply a site collection policy to site collections in bulk.

Complete the following steps to apply a site collection policy:

1. Select one or more site collections and click **Apply Policy** on the ribbon.

   ***Note**: The Apply Policy feature is only available to active and without ongoing process site collections.

2. In the **Apply Policy** window, configure the following settings:
   a. **Site Collection Policy** – Select a site collection policy from the drop-down list. This site collection policy will be applied to the selected site collections.
   b. **Export Location** – Choose one of the following location to store the apply site collection policy result report.
      - **Export to an export location** – Select a previously configured export location from the drop-down list.

- **Export to a folder in SharePoint Online** – Enter the URL of a folder in SharePoint Online.

3. Click **Submit** to save your configurations and go back to the **Site Collection Report** interface. Governance Automation Online will start to apply the site collection policy in the backend. You can click **Refresh** on the ribbon to view the site collection policy name. When the target policy name is displayed under the **Policy** column, the site collection policy is applied successfully.
4. Go to the export location and you can view the apply site collection policy result report, including the following information: **URL**, **Initial Policy**, **Target Policy**, **Result**, and **Comment**.

Electing Site Collection Contacts

The election process provides an automated nomination process to determine the primary site collection contact and the secondary site collection contact. The election tasks will be assigned to the nominated users, who in turn will decide if they want to be accountable for the site collection and become the primary site collection contact. The secondary site collection contact will be defined by the primary site collection contact during the election process.

Complete the following steps to start the election process:

1. Select one or more site collections and click **Elect Contact** on the ribbon.
2. In the **Elect Contact** window, configure the following settings:
   a. **Election Task Title** – Enter the title for the election task that will be generated during the election process.
   b. **Exclude Users** (optional) – Enter the names of the users that will be excluded during the election process.
   c. **E-mail Settings** (optional) – Choose to enable the following notifications by selecting the corresponding checkboxes:
      - **Notify the user when the election task is assigned** – Select the checkbox to send a notification e-mail to the user when the election task is assigned to this user.
      - **Notify the primary contact when the site collection is assigned** – Select the checkbox to send a notification e-mail to the user when this user becomes the primary site collection contact.
      - **Notify the secondary contact when the site collection is assigned** – Select the checkbox to send a notification e-mail to the user when this user becomes the secondary site collection contact.

      Each notification has a default e-mail template. You can also select a custom e-mail template.
   d. **Duration** – Set the duration for each election stage. If the nominee does not handle the election task during the duration, the election task will be assigned to the nominee of

next election stage. Enter a number in the text box, then select **Day(s)** or **Week(s)** as the unit.

You can also notify the nominee before the assigned time is reached. Select the **Remind the nominated user before each nomination task expires** checkbox and select a reminder profile from the drop-down list.

3. Click **Submit** to start the election process or click **Cancel** to go back to the **Site Collection Report** interface without starting the election process.

Specifying Site Collection Contacts

In Site Collection Report, you can define the primary site collection contact and the secondary site collection contact.

Complete the following steps to define the site collection contacts:

1. Select one or more site collections and click **Specify Contact** on the ribbon.
   a. **Primary Site Collection Contact** – Enter the name of the user that will become the primary site collection contact of the selected site collections.

      You can also send an e-mail to notify the user when the site collection is assigned to this user. Select the **Notify the primary contact when the site collection is assigned** checkbox and select an e-mail template from the drop-down list.

   b. **Secondary Site Collection Contact** – Enter the name of the user that will become the secondary site collection contact of the selected site collections.

      You can also send an e-mail to notify the user when the site collection is assigned to this user. Select the **Notify the secondary contact when the site collection is assigned** checkbox and select an e-mail template from the drop-down list.

2. Click **Submit** to save your configurations or click **Cancel** to go back to the **Site Collection Report** interface without saving any configurations.

Sending E-mails to Site Collection Contacts

In Site Collection Report, you can send e-mails to site collection contacts. Refer to the following instructions:

- **Mail All Contacts** – If you want to send e-mails to contacts of all of the site collections in the site collection report, click **Mail All Contacts** on the ribbon. The new e-mail application on your computer is opened. The e-mail addresses of all of the site collection contacts are automatically filled. Enter your desired e-mail subject and body. Then, send the e-mail.
- **Mail Contacts** – If you want to send e-mail to contacts of certain site collections or of all of the site collections, select one or more site collections and click **Mail Contacts** on the

ribbon. Then, select **Mail Contacts of Selected Site Collections** or **Mail Contacts of All Site Collections** from the drop-down list. The e-mail application on your computer is opened. The e-mail addresses of site collection contacts are automatically filled. Enter your desired e-mail subject and body. Then, send the e-mail.

Note that if the **Site Collection Report** page does not respond after you click **Mail All Contacts**, **Mail Contacts of Selected Site Collection**, or **Mail Contacts of All Site Collections**, complete the following steps to resolve the issue:

1. Navigate to **Control Panel** of your computer and click **Programs**. The **Programs** window appears.
2. In the **Programs** window, click **Default Programs**. The **Default Programs** window appears.
3. In the **Default Programs** window, click **Associate a file type or protocol with a program**. The **Set Associations** window appears.
4. In the **Set Associations** window, select **MAIL TO** under the **Name** column, then, click the **Change program…** option.
5. Choose your desired e-mail application.

Site Report Page

To access **Site Report**, click **Site Report** in the **Administration Reports** group. Click **Back** to close the **Site Report** interface.

Managing Site Reports

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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- Search – Filters displayed reports by your entered keyword. You can search desired reports by the following columns: **URL** and **Title**. Only the content in the column displayed in the current view can be searched.
- Manage columns ( ) – Manages which columns are displayed in the list. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Filters which item in the list is displayed. Click the filter items ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Site Reports

To filter and generate site reports, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **URL** and **Site Template**, **Department**, and **Primary Site Contact**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting Site Reports

To export the currently displayed reports, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

User Report Page

To access **User Report**, click **User Report** in the **Administration Reports** group. Click **Back** to close the **User Report** page.

Managing User Report

You can customize how users are displayed in the following ways:

- Sort users ( ) – click the sort ( ) button in a column heading, then select **Ascending** or **Descending**.
- Manage columns ( ) – Manages which columns are displayed in the list. Click the manage columns ( ), then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Filters which item in the list is displayed. Click the filter items ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating User Report

To filter and generate user report, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Display Name**, **Status**, **Department**, **Manager**, **User Contract Term Expiration Time**, and **Created Time**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting User Report

To export the currently displayed users, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Group Report Page

To access **Group Report**, click **Group Report** in the **Administration Reports** group. Click **Back** to close the **Group Report** page.

Managing Group Report

You can customize how groups are displayed in the following ways:

- Sort groups ( ) – Click the sort ( ) button in a column heading, then select **Ascending** or **Descending**.
- Manage columns ( ) – Manages which columns are displayed in the list. Click the manage columns ( ), then select the checkbox next to the column name to have that column shown in the list.
- Filter items ( ) – Filters which item in the list is displayed. Click the filter items ( ) button in the column heading you want to filter, then select the checkbox next to the item name to have that item shown in the list.

Filtering and Generating Group Report

To filter and generate a group report, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **Group Name**, **Status**, **Group Owners**, **Group Lease Expiration Time**, and **Created Time**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting Group Report

To export the currently displayed groups, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Applying a Group Policy

In Group Report, you can apply a group policy to Office 365 groups in bulk.

Complete the following steps to apply a group policy:

1. Select one or more groups and click **Apply Policy** on the ribbon.

   ***Note**: The Apply Policy feature is only available to active groups without ongoing process.

2. In the **Apply Policy** window, configure the following settings:

   a. **Group Policy** – Select a group policy from the drop-down list. The group policy will be applied to the selected groups.

   b. **Export Location** – Select a previously configured export location from the drop-down list or click **Add New Location** to create a new one. This export location will be used to store the apply group result report.

3. Click **Submit** to save your configurations and go back to the **Group Report** interface. Governance Automation Online will start to apply the group policy in the backend. You can click **Refresh** on the ribbon to view the group policy name. When the target policy name is displayed under the **Policy** column, the group policy has been applied successfully.

4. Navigate to the export location to view the apply group policy result report, which includes the following information: **Group Name**, **Group ID**, **Initial Policy**, **Target Policy**, **Result**, and **Comment**.

My Sites

My Sites displays a list of site collections for which the login user is the primary site collection contact/secondary site collection contact/primary site collection administrator and a list of sites for which the login user is the primary site contact or secondary site contact.

To access **My Sites**, click **My Sites** in the **Home Page**.

Managing My Sites Reports

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 the sort ( ) button in a column heading, then select **Ascending** or **Descending**.

You can customize how the reports are displayed in the following ways:

- Search – Allow you to filter reports displayed by the keyword you designate. The **Title**, **URL**, **Primary Contact**, **Secondary Contact**, and **Primary Site Collection Administrator** columns support to search for the desired reports, and only the content in the column displayed in the current view can be searched.
- Manage columns ( ) – You can manage which columns are displayed in the list so that only information you want to see is displayed. Click the manage columns ( ) button, then select the checkbox next to the column name to have that column shown in the list.

Filtering and Generating My Sites Reports

To filter and generate reports, complete the following steps:

1. Click **Set Filter** on the ribbon to customize the report. You can set filters for **URL**, **Department**, **Policy**, and **Primary Contact**.
2. To set new filter rules, click **Reset** and the previous filter rules are cleared to the default ones.
3. Click **Generate Report** to retrieve data for your report. You can also click **Export to Datasheet** to export the report to a local path or an export location. For more information about exporting the report, refer to Exporting Reports.

Exporting My Sites Reports

To export the currently displayed reports, click **Export Report** on the ribbon. For instructions about exporting the report, refer to Exporting Reports.

Managing Lifecycle of My Sites

You can manage the lifecycle of site collections displayed in **My Sites** report by performing the actions below. Note the following:

- These actions will be available only when the corresponding lifecycle actions are enabled in site collection policies and when the built-in Site Collection Lifecycle Management services are active.
- If **Yes/No (check box)** metadata with the **Enable Terms and Conditions Agreement** option enabled has been added to a built-in Site Collection Lifecycle Management service, you must choose **Yes** as the value for this metadata, when you manage the lifecycle of the site collection. Otherwise, the lifecycle action cannot be performed to the site collection.

Perform the following actions to manage the lifecycle of site collections:

- **Archive** – Select a site collection and click **Archive** on the ribbon to archive the site collection. If metadata has been added to the Site Collection Lifecycle Management - Archive Service, the **Archive Site Collection** window will appear. You can modify the metadata values. Then, click **Submit** and a pop-up window appears asking you to confirm the site collection archival. Click **OK** to archive the site collection, or click **Cancel**.
- **Delete** – Select a site collection and click **Delete** on the ribbon to delete this site collection. If metadata has been added to the Site Collection Lifecycle Management - Delete Service, the **Delete Site Collection** window will appear. You can modify the metadata values. Then, click **Submit** and a pop-up window appears asking you to confirm the site collection deletion. Click **OK** to delete the site collection, or click **Cancel**.
- **Lock** – Select a site collection and click **Lock** on the ribbon to lock the site collection.
  - If you are allowed to select the locking type, the **Lock Site Collection** window will appear. Choose one of the following locking types:
    - **Lock the site collection in "no access" status**
    - **Lock the site collection in "read-only" status**
  - If metadata has been added to the Site Collection Lifecycle Management - Lock Service, the **Lock Site Collection** window will appear. You can modify the metadata values.

  Then, click **Submit** and a pop-up window appears asking you to confirm the site collection locking. Click **OK** to lock the site collection, or click **Cancel**
- **Unlock** – Select a locked site collection and click **Unlock** on the ribbon to unlock the site collection. If metadata has been added to the Site Collection Lifecycle Management - Unlock Service, the **Unlock Site Collection** window will appear. You can modify the metadata values. Then, click **Submit** and a pop-up window appears asking you to confirm the site collection unlocking. Click **OK** to unlock the site collection, or click **Cancel**.

- **Extend** – Select a site collection and click **Extend** on the ribbon to extend the site collection lease period. The **Extend Site Collection Lease Period** window appears.
    - The lease extension period is displayed if the IT Admin has defined it; if the field is available to configure, define the amount of time to extend the lease period. Enter a number in the text box, then, select a time unit from the drop-down list.
    - If metadata has been added to the Site Collection Lifecycle Management – Extend Service, you can modify the metadata values.

  Then, click **Submit** and a pop-up window appears asking you to confirm the site collection lease period extension. Click **OK** to extend the site collection lease period, or click **Cancel**.

- **Change Policy** – Select a site collection and click **Change Policy** on the ribbon to change the site collection policy. The **Change Site Collection Policy window** appears.
    - Select a site collection policy that you want to apply to the site collection from the drop-down list.
    - If metadata has been added to the Site Collection Lifecycle Management – Change Policy Service, you can modify the metadata values.

  Then, click **Submit** and a pop-up window appears asking you to confirm the site collection policy change. Click **OK** to change the site collection policy, or click **Cancel**.

- **Change Quota** – Select a site collection and click **Change Quota** on the ribbon to change the resources allocated to the site collection. The **Change Site Collection Quota** window appears.
    - Enter a number in the text box as the new storage quota size.
    - If metadata has been added to the Site Collection Lifecycle Management – Change Quota Service, you can modify the metadata values.

  Then, click **Submit** and a pop-up window appears asking you to confirm the site collection quota change. Click **OK** to change the site collection quota, or click **Cancel**.

Starting a Request for a Site Collection

When viewing reports in My Sites, you can start a request for a specific site collection.

1. Select a site collection and click **Start a Request** on the ribbon. The **Start a Request** window appears.
2. You may need to select a service type from the drop-down list and click **OK**.

3. The service catalog appears displaying the selected type of services that meet all of the following conditions:
    - Services that you are assigned the permission to use.
    - Services that you are assigned the permission to submit requests.
    - Services that contain the selected site collection in the service scope.

Exporting Reports

In Governance Automation Online, you are allowed to export the following reports:

- Public Site Collection Directory Report
- User Activity Report
- Service Request Report
- Approval Process Report
- Site Collection Report
- Site Report
- My Sites Report

In the **Export Report** window of each report, configure the following settings:

1. **Report Export Location** – Choose the final location for the exported report.
    - **Export to a local path** – Export the report locally to your computer.
    - **Export to an export location** – Export the report to an export location on Microsoft Azure.
2. If you choose **Export to an export location**, select an export location from the drop-down menu, or click **Add New Location.** You will be redirected to the **Report Export Location** interface.
3. **Report Format** – Select either **CSV** or **XLS** as the report format from the drop-down menu.
4. Click **Export to Datasheet** to export the report.

Submitting Feedback

Governance Automation Online provides a platform to collect feedback, if you want to report bugs, give suggestions for product features, or provide comments about your Governance Automation Online experience. Refer to the following steps to submit feedback:

1. In Governance Automation Online, click the submit feedback ( ) button on the upper-right corner.

   If you would like to be contacted by an AvePoint representative after submitting feedback, select the **Would you like to be contacted by an AvePoint representative in regards to your issue?** checkbox at the top of the window.

2. Provide feedback in one or all of the three available feedback tabs: Bug Report, Interface Improvement, and Feature Suggestion. Refer to the appropriate section below for further details.

Bug Report

In the **Bug Report** tab, provide detailed information about the bug that you want to report:

1. **Service Types** – Select the types of services you were using when you found the bug/error. Select the checkboxes before the service types in the drop-down list.
2. **Bug Type** – Choose the type of the bug, **Logic** or **User Interface**.
3. **Severity** – Define the severity of the bug (1=Trivial, 5=Critical) by selecting a level on the scroll bar.
4. **Details** – Enter your own description to tell us the details of the bug (for example, how often the bug appears, what process the bug affects, and what actions were performed before the bug appears).
5. Click **Send Now** to submit your feedback.

Interface Improvement

In the **Interface Improvement** tab, you can provide feedback about your experience with the interface:

1. **Tree and Interface Performance** – Choose your evaluation for the performance of the data tree interface and SharePoint Online functions.
2. **How would you describe the DocAve Governance Automation Online Interface?** – Choose your evaluation of the DocAve Governance Automation Online interface.
3. **Additional Feedback** – Enter any additional feedback that you want to share with us in the provided text box.
4. Click **Send Now** to submit your feedback.

Feature Suggestion

In the **Feature Suggestion** tab, you can provide suggestions on any of our product features.

1. **Service Type** – Select the types of services that you would like to improve. Select the checkboxes before the service types in the drop-down list.
2. **Your Suggestion** – Enter your suggestion for the feature in the text box, providing as much detail as possible.
3. Click **Send Now** to submit your feedback.

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