



# DocAve<sup>®</sup>

# Governance Automation

## Business User Guide

Service Pack 7

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## Submitting Documentation Feedback to AvePoint

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

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

## What's New in this Guide

- Added information about [Starting a Request in My Sites](#).

# About DocAve Governance Automation

This guide is designed to help business users make a service requests, manage their own tasks, and view reports generated by Governance Automation; if you are an administrator of Governance Automation, refer to [DocAve Governance Automation User Guide for Administrators](#).

When business users request services, like provisioning a new site, deploying Web parts, or archiving content, traditionally IT administrators would create and manage these SharePoint tasks manually.

Governance Automation provides ways to create and govern your SharePoint components automatically by submitting customizable, predefined service requests, which can trigger corresponding workflows and policies. By using Governance Automation, business users can communicate, track, and audit their requests to IT Administrators more effectively. Governance Automation provides:

- **Provisioning:**  
Gives users what they need quickly and easily while enforcing corporate policies across the organization. Catalogued services with automated approval processes ensure that standardized settings and configurations are applied to all new sites.
- **Lifecycle Management:**  
Give users easy access to IT services while helping IT meet data governance needs. Governance Automation makes setting up where your content will live, how it will be archived when it's no longer relevant, and how it will be removed at the end of your retention policy easy and transparent.
- **Security:**  
Gives you the ability to implements a data governance strategy that protects your data before it is even created. Governance Automation can set up in-policy workspaces via multi-stage approval processes with permission management review for maximum data security. Governance Automation also ensure compliance with corporate and industry standards by automatically correcting unauthorized changes with Policy Enforcer.

## Understanding Service Requests and Tasks

Your SharePoint administrator can create services which contain a set of configured settings for SharePoint operations that comply with your organization's rules and standards. These services are tailored to the needs of different departments and for particular purposes within your organization. As a business user, you will be able to submit requests for these services according to your SharePoint needs: such as Create Site, Content Move, Grant Permissions, etc. Once you submit a service request, the approval process associated with the service will automatically notify the designated approvers of your request. After all approvers have approved the request for a service, Governance Automation will perform the necessary operations to complete the request.

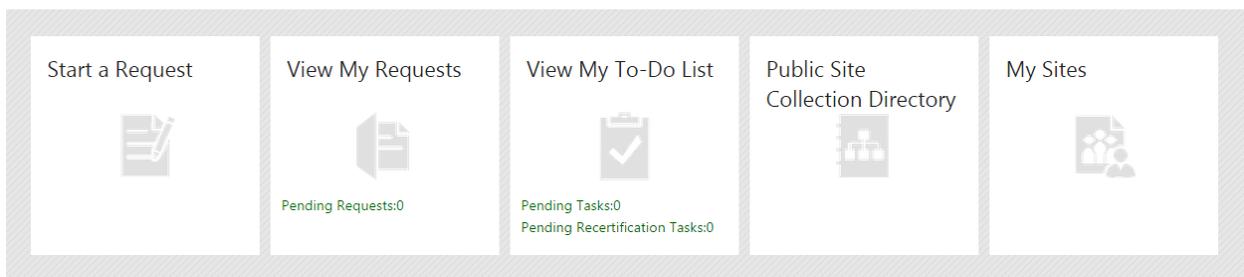
If you are a designated approver for a service, a task will appear in your **My Tasks** list within **My To-Do List** when a request for the service is submitted and all previous approval steps have been completed.

## Familiarizing Yourself with the Interface

To access Governance Automation, your Information Technology team will direct you to the appropriate URL or hyperlink and login method. Once you log in, the business user landing page will appear.

The landing page provides you with essential information about your service requests and tasks. Click the tiles to navigate to that particular interface. At any point, click **Menu** in the upper-left corner to return to the landing page.

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



**Figure 1: Business user landing page.**

Many screens use a similar interface to display information in a table view. To change the number of items 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 items are displayed in a number of different ways:

- Search – Filters displayed items by your entered keyword. You can search desired items by column values. 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 , then select the checkbox next to the column name to have that column shown in the list.
- Filter  – Allows you to filter which item in the list is displayed. Click the filter  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.

# What are the Governance Automation Roles

In Governance Automation, each user is specified a role, which allows them to perform certain actions. Governance Automation uses the following role types:

- **Users** – can make service requests and view their requests.
- **Approvers** – can also make requests, but are primarily responsible for reviewing and approving or rejecting service requests.
- **Site Contacts** – are users who are responsible for specific sites or site collections; Site Contacts have access to different reports about the content they own.

These roles are applied to users by IT Administrators. For more information about managing user roles, refer to the [DocAve Governance Automation User Guide for Administrators](#).

## Configuring Your Personal Settings

When you first log into Governance Automation, you will need to configure your personal settings, including the displayed language and time zone. To configure these settings:

1. Click your login ID on the navigation bar.
2. Click **Configure Personal Settings**.
  - **Language** – Select a **Language** from the drop-down menu to set it as the display language.
  - **Time Zone and Date/Time Format** – Select the display time zone, date format, and time format for the Governance Automation interface.
  - **Office 365 Account** – Enter the Office 365 account that will be mapped with the current login user, so that the current login user can manage content in SharePoint Online.  
**\*Note:** The entered Office 365 account must be in the **someone@example.com** format.
3. Click **Save** on the ribbon. The Governance Automation Office 365 Account password prompt window appears.
4. Enter the password for the Office 365 account in the text box and click **OK** to save your configuration; the display language, time zone, date format, and time format will change automatically. Click **Cancel** to close the window without saving any configurations.

# What Can I Do as a User?

Governance Automation users can submit services requests and view their requests. Service requests are tailored to the needs of different departments and for particular purposes within your organization. As a business user, you will be able to submit requests for services according to your SharePoint needs, i.e. Create a Site, Content Move, Grant Permissions, etc.

## Starting a Request

To start a request for a service, click **Start a Request** on the landing page of the Governance Automation interface. The **Start a Request** interface appears and contains all of the available services and questionnaires that are displayed in your catalog.

In the **Start a Request** interface:

1. Select a service by clicking the service name.  
If you selected a questionnaire, answer the questions and click **Submit**. Governance Automation will display the available services according to your answers.
2. Enter the required information in the configuring service request interface. The following fields are common request settings:
  - a. **Request summary** – Enter a brief summary for your new service request. It will be displayed on your **My Requests** and your approvers' **My Tasks** lists. The request summary should reflect the request's purpose or function in order to help your approvers to quickly understand the business need behind your request.
  - b. **Notes to approvers** (optional) – Enter the notes that will be displayed to your approvers.
  - c. **Add Attachment** (optional) – Upload one or more attachments that will help your approvers understand your request better. Click **Add Attachment** and browse to a file in the pop-up window.
3. Choose one of the following options:
  - Click **Save As Draft** to save the request as a draft and leave the configured settings for later.
  - 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 for service requests by entering a service name keyword in the text box located in the upper-right corner of the Governance Automation interface.

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 languages.

## Viewing Your Submitted and Saved Requests

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

All of the requests that you have submitted are displayed in the **Submitted Requests** tab; all of the requests that you have saved, but have not submitted, are displayed in the **Saved Requests** tab.

To manage the requests, click **View My Requests** in the landing page. Select the **Submitted Requests** or **Saved Requests** tab in the **View My Requests** page

To change the number of requests displayed per page, select the desired number from the **Show rows** drop-down menu in the upper right-hand corner. To sort requests, click the sort (↕) button in a column heading, then select **Ascending** or **Descending**.

You can customize how requests are displayed in a number of different ways, see [Familiarizing Yourself with the Interface](#).

## Actions You Can Take on Submitted Requests

You can perform the following actions on Submitted Requests:

- View Details – Click a request summary to see more information.
- **Copy** – Duplicate the existing service request to make minor changes in order to submit as a new service request. Select a desired submitted request. Click **Copy** on the ribbon, and make the desired modifications.

When you have finished making changes, choose one of the following options:

- 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.
- **View Request History** (This button is only visible when **Allow all approvers to edit this service request** is selected in the corresponding service) – Select a request and click **View Request History** to view the versions of this request.

- **Cancel Request** – Select a submitted request that you wish to cancel and click **Cancel Request** on the ribbon.
- **Refresh** – Click **Refresh** on the ribbon to refresh information of your submitted requests.

## Actions You Can Take on Saved Requests

You can perform the following actions on saved requests:

- **View Details** – Click a request summary to see more information.
- **Edit** – Select a saved request, then click **Edit** on the ribbon to edit the settings of this request.

When you have completed editing the configurations, choose one of the following options:

- Click **Save** to save all of the settings.
  - Click **Save and Submit** to submit this request to the approvers.
  - Click **Cancel** to return to the **My Requests** interface without saving any configurations.
- **Delete** – Select a request, then 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 save as a new service request. Select a desired submitted request. Click **Copy** on the ribbon, and make the desired modifications.

When you have finished making changes, choose one of the following options:

- 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.
- **Refresh** – Click **Refresh** on the ribbon to refresh information of your saved requests.

# What Can I Do as an Approver?

Approvers are users that are primarily responsible for reviewing and approving or rejecting service requests. By approving the service requests, Approvers give users what they need quickly and easily while enforcing corporate policies across the organization.

Approvers can also submit and review requests, like a user. For more information on submitting and reviewing requests, see [Starting a Request](#) and [Viewing Your Submitted and Saved Requests](#).

## Approving Requests

When a service request is submitted and you are one of its approvers, a task will be assigned to you.

To manage your tasks, click **View My To-Do List** in the landing page and then click the **My Tasks** tab.

You can approve the follow types of requests:

- Create Site Collection
- Create Site
- Create My Site
- Create Library/List
- 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 – Lock Site Collection
- Site Collection Lifecycle Management – Unlock Site Collection
- Site Lifecycle Management – Archive Site
- Site Lifecycle Management – Delete Site
- Change Site Collection Contact or Administrator
- Change Site Collection Settings
- Change Site Contact
- Change Site Metadata
- Change Library/List Settings
- Content Move

- Content Migration
  - Grant Permissions
1. Click a task name to see more information about the task. The **View Details** page will appear.
  2. In the **View Details** page, 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** interface.
 

**\*Note:** This button is only visible to the approvers when **Allow all 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** interface.
 

**\*Note:** This button is only visible to the approvers when **Allow all approvers to edit this service request** is selected in the corresponding service
  3. Click **Approve** on the ribbon to approve the task. Enter any comments you may have in the pop-up window.
  4. Click **OK** to finish this task or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Rejecting Requests

When a service request is submitted and you are one of its approvers, a task will be assigned to you.

To manage your tasks, click **View My To-Do List** in the landing page and then click the **My Tasks** tab.

You can reject the following types of requests:

- Create Site Collection
- Create Site
- Create My Site
- Create Library/List
- 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 – Lock Site Collection
- Site Collection Lifecycle Management – Unlock Site Collection

- Site Lifecycle Management – Archive Site
  - Site Lifecycle Management – Delete Site
  - Change Site Collection Contact or Administrator
  - Change Site Collection Settings
  - Change Site Contact
  - Change Site Metadata
  - Change Library/List Settings
  - Content Move
  - Content Migration
  - Grant Permissions
1. Click a task name to see more information about the task. The **View Details** page will appear.
  2. In the **View Details** page, 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** interface.  
**\*Note:** This button is only visible to the approvers when **Allow all 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** interface.  
**\*Note:** This button is only visible to the approvers when **Allow all approvers to edit this service request** is selected in the corresponding service
  3. Click **Reject** on the ribbon to reject the task. Enter any comments you may have in the pop-up window.
  4. Click **OK** to finish this task or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Reassigning Tasks

When a service request is submitted and you are one of its approvers, a task will be assigned to you.

To manage your tasks, click **View My To-Do List** in the landing page and then click the **My Tasks** tab.

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 and content database threshold warning 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 save your changes.

# What Can I Do as a Site Contact?

Site Contacts are users who are responsible for specific sites or site collections and have access to different reports about the content they own. Site Contacts use Governance Automation to set up where their content will live, how it will be archived when it's no longer relevant, and how it will be removed at the end of their planned retention policy.

## Generating My Sites Reports

The **My Sites** page displays site collections and sites that you own or are listed as a contact on. To access **My Sites**, click **My Sites** in the landing page.

My Sites Reports are reports that provide detailed information about the provisioning, usage, and members of a site collection or site that you own or are listed as a contact.

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 a number of different ways, see [Familiarizing Yourself with the Interface](#).

To generate a My Sites Report, follow the steps below:

1. Click **My Sites** in the landing page.
2. Click **Set Filter** on the ribbon to customize the report. You can set filters for **URL**, **Status**, **Department**, **Policy**, **Primary Site Collection Contact/Primary Site Contact**, and **Metadata**. Filter by **Lease Period Expiration Date** is also supported.  
**\*Note:** Metadata with the **Yes/No** or **Date and Time** type is unsupported for filtering.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to store the report.
  - a. In the **Export Report** window, choose to export the report to a local path or a network location.
  - b. If you choose **Export to an export location**, select and export location from the drop-down menu.
  - c. In the **Report Format** field, select either **CSV** or **XLS** as the report format from the drop-down menu.
  - d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

## Starting a Request in My Sites

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

Select a site collection or site and click **Start a Request** on the ribbon. The service catalog appears displaying services that meet the following conditions:

1. If you select a site collection, the following types of services may be available:

- Create Site
- Create Library/List
- Site Collection Lifecycle Management
- Change Site Collection Settings
- Change Site Collection Contact or Administrator
- Change Library/List Settings
- Clone or Transfer User Permissions
- Grant Permissions
- Change Permissions
- Content Move
- Content Migration

If you select a site, the following types of services may be available:

- Create Site
- Create Library/List
- Site Collection Lifecycle Management
- Change Site Contact
- Change Site Metadata
- Change Library/List Settings
- Clone or Transfer User Permissions
- Change Permissions
- Change Permissions
- Content Move

2. Services that you are assigned the permission to use.

3. Services that you are assigned the permission to submit requests.

4. Services that contain the selected site collection or site in the service scope.

## Managing the Automatic Site Collection Lifecycle Tasks

As a Site Contact, you are responsible for managing the automatically generated lifecycle tasks for a site collection. These tasks include the following actions:

- [Continuing Site Collection Access](#)
- [Extending a Site Collection Lease](#)
- [Archiving a Site Collection](#)
- [Deleting a Site Collection](#)
- [Changing a Site Collection Policy](#)
- [Changing a Site Collection Quota](#)

To view a task, click a task name. The **View Details** window will appear. In addition to the basic task information, you can view the **Lifecycle Action History** field to see the chosen lifecycle actions of the previous approval stages. Only the last approver's chosen lifecycle action will take effect.

### Continuing Site Collection Access

When a site collection is still in use, but you would like to continue allowing access to a site collection, you can submit a Continue Access task. To request continued access to the site collection, follow the steps below:

1. Select a desired task, and click **Continue Access** on the ribbon.
2. In the pop-up window, click **OK** to confirm this action, or click **Cancel** to return to the **My Tasks** interface without executing the task.

### Extending a Site Collection Lease

When a site collection's lease is going to expire, you can extend the lease. To do so, follow the steps below:

1. Select a task, and click **Extend** on the ribbon.
2. In the **Extend Site Collection Lease Period** field, the lease period is displayed if the IT Administrator has defined the site collection lease period. If this field is available to configure, define the amount of time to extend the lease period by entering a number in the text box and selecting **Day(s)**, **Week(s)**, **Month(s)**, or **Year(s)** from the drop-down menu.
3. In the **Comments** field, enter your comments for the task.
4. Click **OK** to confirm this action, or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Archiving a Site Collection

To archive a site collection whose inactivity threshold or lease period is reached, follow the steps below:

1. Select a task, and click **Archive** on the ribbon.
2. In the pop-up window, click **OK** to confirm this action, or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Deleting a Site Collection

To delete a site collection whose inactivity threshold or lease period has been reached, follow the steps below:

1. Select a desired task, and click **Delete** on the ribbon.
2. In the pop-up window, click **OK** to confirm this action, or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Changing a Site Collection Policy

To change a site collection policy for a site collection whose inactivity threshold or lease period has been reached, follow the steps below:

1. Select a task, and click **Change Policy** on the ribbon.
2. In the pop-up window, click **OK** to confirm this action, or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Changing a Site Collection Quota

To change the site collections quota size or quota template for a site collection whose quota threshold has been reached, follow the steps below:

1. Select a task, and click **Change Quota** on the ribbon.
2. Edit the quota configurations to make the quota size smaller or larger.
3. Click **OK** to save your configurations, or click **Cancel** to return to the **My Tasks** interface without executing the task.

## Ignoring a Site Collection Quota Threshold Task

To ignore a quota threshold task for a site collection whose quota threshold has been reached, follow the steps below:

1. Select a task, and click **Ignore** on the ribbon.
2. In the pop-up window, set the time interval to remind the threshold if the size of the site collection still exceeds the quota threshold after the time interval. Enter a number in the text box and select **Day(s)** or **Week(s)** from the drop-down list.

3. Click **OK** to save your configurations.

## Managing Clone or Transfer User Permissions and Manual Archive Tasks

You can perform the following actions on the following tasks: Clone or Transfer User Permissions and Manual Archive services.

- **View Task** – Click a task name to see the detailed information of this task. In the **View Details** page, you have the following options:
  - **Submit** – Click **Submit** on the ribbon to submit this task.
  - **Reassign** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.
  - **Edit Request** (This button is only visible to the approvers when **Allow all 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** (This button is only visible to the approvers when **Allow all approvers to edit this service request** is selected in the corresponding service) – Click **View Request History** to view the versions of this request in the **View Request History** interface.
  - Click **Review the Report** on the ribbon to review detailed report of this task, then select **View on screen** or **Download report**.
    - **View on screen** – Open the report directly to view details on screen. Select the data you want to change, and then click **Finish**.
    - **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.
- **Submit** – Select a task, and click **Submit** on the ribbon to submit the task. Enter any comments you may have in the pop-up window. Click **OK** to finish this task, or click **Cancel** to return to the **My Tasks** interface without executing the task.
- **Reassign** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Select a task, and click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.

## Managing Change Permissions Tasks

You can perform the following actions on the tasks from Change Permissions services:

- **View Task** – Click a task title to see the detailed information of this task. In the **View Details** page, you have the following options:
  - **Submit** – Click **Submit** on the ribbon to submit this task.
  - **Reassign** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.
  - **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. For more information, refer to [Reviewing Permissions to Change](#) and [Selecting Permissions to Remove](#).
    - **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 all 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** (This button is only visible to the approvers when **Allow all approvers to edit this service request** is selected in the corresponding service) – 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.
- **Reassign** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Select a task, and click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.

## Reviewing Permissions to Change

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

**\*Note:** If any of the available options are not displayed on the ribbon, click the ellipsis (  ) button, and then select that option.

- **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**.
- **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.
- **View History** – Click **View History** to view the previous versions of the report.
- **Delete User** – Select a user 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 user.
- **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** on the ribbon. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the user’s permissions.
- **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** on the ribbon. 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.

## Selecting Permissions to Remove

If you view the details of a Change Permissions task for removing permissions, all of the retrieved permissions of the request scope are selected in the **Review the Report** window.

Deselect one or more pieces of permissions if you do not want to remove these permission. Click **Finish** on the ribbon to confirm your selection.

## Managing Election Tasks

An election process provides an automated nomination process to determine the primary site collection contact and the secondary site collection contact. Election tasks are 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.

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

You can perform the following actions on the 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 confirmation window appears. 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 confirmation window appears. Click **OK** to confirm your action.

## Managing Your Recertification Report

My Recertification Report is a report of recertification tasks that are assigned to you. A recertification task contains the retrieved site collection permission, metadata, or ownership. In the **My Recertification Report** tab, all of the permission recertification tasks, metadata recertification tasks, and ownership recertification tasks are displayed.

You may change the number of tasks displayed per page, as well the order they are displayed in. To change the number of tasks displayed per page, select the desired number from the **Show rows** drop-

down menu in the upper-right 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 a number of different ways, see [Familiarizing Yourself with the Interface](#).

## 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 managed site collection, a permission recertification task will be generated. This task contains the permissions of users and groups for this site collection. Approvers can then modify the permissions in Governance Automation and the permission changes will be updated to SharePoint.

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

- **View Task** – Click a request summary to see detailed information. In the task details page, you have the following options:
  - \*Note:** If any of the available options are not displayed on the ribbon, click the ellipsis (  ) button, and then select that option.
  - **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.
  - **Reassign** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.
  - **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 recertification report. In the **Export Report** window, choose to export the report to a local machine or export the report to an export location, then 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 task.
  - **Delete User** – Select a user 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 user.

- **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** on the ribbon. A pop-up window appears which asks you to confirm your operation. Click **OK** to remove the user’s permissions.
- **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** on the ribbon. 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.

- **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** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Select a task, and click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Then, click **OK**.

## Metadata Recertification Tasks

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

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

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**. In the **Edit** window, modify the metadata value, then click **Save** to save your changes.
  - **Submit** – Click **Submit** on the ribbon to submit the changes and apply all of your configurations to SharePoint.
  - **Reassign** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.
  - **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** to view the previous versions of the task.
- **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** (This button is only visible to approvers when **Allow approvers to reassign tasks to others** is selected in the corresponding approval process) – Select a task, and click **Reassign** on the ribbon to reassign the task. In the pop-up window, enter the name of a user or group that will become the approver. Click **OK**.

## 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 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 confirmation window appears. 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 confirmation window appears. Click **OK** to confirm your action.

# Public Site Collection Directory Reports

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. Site Collections with **Publish to Directory** metadata are considered “published” site collections.

**Publish to Directory** is a pre-defined metadata label which will be automatically added into the Create Site Collection service. You can choose whether or not to add this metadata to the site collection created by Governance Automation when submitting a service request. All of the site collections with **Publish to Directory** metadata can be displayed in the Public Site Collection Directory.

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

If it is the first time you are accessing the Public Site Collection Directory or you did not set custom filter rules for the reports, the reports are displayed according to the default global filter set by your IT Administrator.

## 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 a number of different ways, see [Familiarizing Yourself with the Interface](#).

## Generating Public Site Collection Directory Reports

To filter 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**, **Farm Name**, **Site Template**, **Site Collection Size**, **Status**, **Department**, **Policy**, **Primary Site Collection Contact**, and **Metadata**. **Filter by Expiration Date** is also supported. Set **Inactivity Threshold Date** and **Lease Period Expiration Date** to add more filter rules.

**\*Note:** Metadata with the **Yes/No** or **Date and Time** type is unsupported for filtering.

2. To clear customized filter rules and use the default filter rules set by your IT Administrator, click **Reset to Default Filter**.
3. Click **Generate Report** to retrieve data for your report, or click **Export to Datasheet** to export the report to storage. If you select **Export to Datasheet**:
  - a. In the **Export Report** window, choose to export the report to a local path or an export (network) location to store the report.

- b. If you choose **Export to an export location**, select an export location from the drop-down menu.
- c. In the **Report Format** field, select either **CSV** or **XLS** as the report format from the drop-down menu.
- d. Click **Export to Datasheet** to generate the report, or close the pop-up window to return to the previous interface.

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