



# DocAve<sup>®</sup>

## Governance Automation

### Service Pack 5 Cumulative Update 2

## Release Notes

For Microsoft<sup>®</sup> SharePoint<sup>®</sup>

Released March 10, 2015

# Governance Automation SP5 CU2 Update Details

Refer to the **Updating Governance Automation** section of the [DocAve Governance Automation Administrator Guide](#) for instructions on updating your Governance Automation instance.

The following table provides important update details specific to Governance Automation SP5 CU2.

<b>Required Minimum Version for Direct Update</b>	Governance Automation SP5 is the minimum version required to directly update to Governance Automation SP5 CU2.
<b>Supported SharePoint Versions</b>	SharePoint 2013 Online or On-Premises SharePoint 2010 Online or On-Premises
<b>Dependencies on Other AvePoint Products</b>	For a compatibility matrix of the supported platform versions, refer to the AvePoint KB article <a href="#">Governance Automation, DocAve, and SnapManager for SharePoint Support Matrix</a> .
<b>New License Required?</b>	No
<b>IIS Reset Required?</b>	No
<b>Reboot Manager Server Required?</b>	No
<b>Reboot Agent Servers Required?</b>	No
<b>How to Verify a Successful Update</b>	To verify your Governance Automation update, navigate to <b>DocAve Control Panel &gt; Update Manager &gt; View History</b> , select the Governance Automation-related object, and check whether the update installed successfully in each required Manager and Agent.

# New Features

## General Platform Updates

- DocAve Governance Automation Service Pack 5 Cumulative Update 2 supports SnapManager 8.2 for SharePoint.
- The Site Policy Bar now supports SharePoint 2010.
- In **Approval Process Management > Create Approval Process**, default and custom SharePoint groups are now available approver roles.
- The DocAve Governance Automation Web Part now supports setting other DocAve Governance Automation pages besides the Governance Automation homepage as the Web part homepage.

## Authentication

- Governance Automation now supports Active Directory Federation Services as the authentication method and in the People Picker box.
- Added the **Synchronize Authentication Method from DocAve** in DocAve Governance Automation user interface, which Admins can use to sync the authentication method configured in DocAve 6 to DocAve Governance Automation.

## Recertification

- Added ownership recertification in a recertification profile. Ownership recertification enables the election process to assign site collection contacts on a periodic schedule.
- Added support for permission/metadata/ownership recertification on SharePoint on-premises My Sites.
- In the **My To-Do List** app part, added the **My Recertification Report** tab.

## Services and Services Management

- In Service Management, added the **Use SharePoint context to automatically populate the service request scope** feature on **Change Library/List Settings**, **Change Site Metadata**, and **Change Site Collection Settings** services.
- In **Service Management > Create Site Collection**, added an option for **Site Collection Template: Retrieve custom site template from an external data source**. With this option selected, Admins can retrieve existing custom site templates from a library or column.
- In **Service Management > Create Site Collection**, added **Additional Site Collection Administrators**, which allows you to select one or more users as additional site collection

administrators of a new site collection or allows a business user to configure this in the **Create Site Collection Service** request page.

- In **Service Management**, added **Request Access via Governance Automation Grant Permissions Service**, which allows Admins to choose how to apply a request access feature to a new site collection: inherit the request access settings from its parent Web application or apply a unique Grant Permissions service to the newly created site collection.

## Questionnaires and Questionnaire Management

- Admins can now copy a questionnaire to create new questionnaires.
- In **Questionnaire Management**, you can now edit the **No Service** end point.

## Monitoring and Reporting

- In **Monitoring and Reporting > Site Collection Report**, added **Apply Policy**, which allows Admins to bulk apply a site collection policy to site collections.
- In **Monitoring and Reporting > Site Collection Report > Elect Contact**, Admins now have an automated nomination process for determining primary site collection contact and secondary site collection contact. Election tasks will be assigned to nominated users, who will then decide if they want to be the primary site collection contact. The secondary site collection contact will be defined by the primary site collection contact during the election process.
- In **Monitoring and Reporting > Site Collection Report**, added the **Permission Recertification Status** column, the **Metadata Recertification Status** column, and the **Ownership Recertification Status** column. Admins can determine recertification progress and results through this interface.
- Optimized the interface design of ownership recertification reports.
- In **Monitoring and Reporting > Site Collection Report**, added the **Refresh** button, which allows Admins to manually refresh reports.

## Bug Fixes

- Fixed a bug where an error page would appear when logging into SharePoint after deploying Governance Automation App.

## Known Issues

- In Governance Automation **Settings > Metadata Management**, create a Lookup metadata that retrieves data from a SharePoint Online User Profile Service. When getting user profile from system role/Person or Group metadata, the **\$Requester** and **\$ManagerOfRequester** roles are not supported. Due to user mapping requirements when using AD or ADFS with SharePoint Online, the \$Requester and \$ManagerOfRequester roles are not supported when creating a Lookup metadata that retrieves data from a SharePoint Online User Profile Service.

**Workaround:** AvePoint recommends that an on-premises User Profile Service is used for hybrid deployments.

- User must reenter username and password when using Quick Launch of Governance Automation. This is true even if user logs into the site by using an account that has the permission to access both Governance Automation and the SharePoint site.

**Workaround:** In Internet Options, add both the Governance Automation website and the SharePoint site to **Trusted sites**.

- When using Google Chrome web browser to access a SharePoint site where Governance Automation Web Part is installed, the web part cannot be displayed. This is because no trusted certificate has been applied.

**Workaround:** In Google Chrome web browser, navigate to **Settings > Show advanced settings > HTTPS/SSL**. Click **Manage certificates**. In the Certificate window, click **Import**, to import the exported certificate. Make sure to place the certificate in the store **Trusted Root Certification Authorities**. When configuring Web part settings, make sure the Governance Automation URL is set in the format of `https://hostname:port`.

- The Questionnaire feature is not supported for use with Internet Explorer 8.
- If security trimming is turned on in the Content Move service, and the requester has permissions to access the source site but not the lists within the source site, then the source lists are copied to the destination node upon the completion of the request. To apply security checks down to the item level will cause performance issues.

**Workaround:** Select **Copy security** in the Content Move service. This way, the source user permissions will be copied to the destination and the requester will not have permissions to access the child node in the destination.

- Alternate Access Mapping (AAM) URLs are invalid in a site collection's Content Move service request due to the fact that SharePoint Online dedicated instances cannot retrieve the username and password of the AAM URL.

**Workaround:** Register the AAM URL of the site collection in DocAve before submitting the request.

- When requesting libraries/lists in bulk, if the template names are entered in Japanese in the CSV file and then imported, the imported CSV details in Governance Automation interface will not display the imported data. This is because the CSV file is encoded using ANSI.

**Workaround:** Open the CSV file with Notepad and save it with the Unicode encoding type.

- When accessing the Governance Automation Web part using Internet Explorer, users may encounter errors. To resolve this, navigate to **Internet Options > Security tab > Trusted Sites**, and add the URL for Governance Automation to the trusted sites without the port number (for example: <https://10.2.4.43>).

# Notices and Copyright Information

## Notice

The materials contained in this publication are owned or provided by AvePoint, Inc. and are the property of AvePoint or its licensors, and are protected by copyright, trademark and other intellectual property laws. No trademark or copyright notice in this publication may be removed or altered in any way.

## Copyright

Copyright ©2015 AvePoint, Inc. All rights reserved. All materials contained in this publication are protected by United States and international copyright laws and no part of this publication may be reproduced, modified, displayed, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of AvePoint, 3 Second Street, Jersey City, NJ 07311, USA or, in the case of materials in this publication owned by third parties, without such third party's consent. Notwithstanding the foregoing, to the extent any AvePoint material in this publication is reproduced or modified in any way (including derivative works and transformative works), by you or on your behalf, then such reproduced or modified materials shall be automatically assigned to AvePoint without any further act and you agree on behalf of yourself and your successors, assigns, heirs, beneficiaries, and executors, to promptly do all things and sign all documents to confirm the transfer of such reproduced or modified materials to AvePoint.

## Trademarks

AvePoint<sup>®</sup>, DocAve<sup>®</sup>, the AvePoint logo, and the AvePoint Pyramid logo are registered trademarks of AvePoint, Inc. with the United States Patent and Trademark Office. These registered trademarks, along with all other trademarks of AvePoint used in this publication are the exclusive property of AvePoint and may not be used without prior written consent.

Microsoft, MS-DOS, Internet Explorer, Office, Office 365, SharePoint, Windows PowerShell, SQL Server, Outlook, Windows Server, Active Directory, and Dynamics CRM 2013 are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Adobe Acrobat and Acrobat Reader are trademarks of Adobe Systems, Inc.

All other trademarks contained in this publication are the property of their respective owners and may not be used without such party's consent.

## Changes

The material in this publication is for information purposes only and is subject to change without notice. While reasonable efforts have been made in the preparation of this publication to ensure its accuracy, AvePoint makes no representation or warranty, expressed or implied, as to its completeness, accuracy, or suitability, and assumes no liability resulting from errors or omissions in this publication or from the use of the information contained herein. AvePoint reserves the right to make changes in the Graphical User Interface of the AvePoint software without reservation and without notification to its users.

AvePoint, Inc.  
Harborside Financial Center, Plaza 10  
3 Second Street, 9th Floor  
Jersey City, New Jersey 07311  
USA