

MICROSOFT 365 GOVERNANCE & SECURITY

Your Policy. Our Automation.

Accountability & Security Recertification

- **Public Site Collection Directory** – Provides a list of all site collections – along with corresponding business and IT contacts, email address, classification, and storage usage – for insight into trends to determine chargeback models while ensuring business owner accountability.
- **Ownership and Metadata Recertification** – Ensure that the classification and ownership of your SharePoint sites remain current and accurate with periodic recertification tasks to validate or modify metadata and ownership details.
- **Membership and Permissions Recertification** – Automatically assign key users with tasks to review and correct all SharePoint user permissions, Microsoft 365 Groups and Teams memberships on a scheduled basis. Changes to permissions, and Groups and Teams membership can be made directly in the task before certifying compliance with organizational security policies.
- **Automated Renewal of Recertifications** – Streamline the recertification of tasks by creating an automated single process for renewal of ownership, classification, and permissions of SharePoint sites, Microsoft 365 Groups and Teams with dynamic look up rules to assign proper contacts for the renewal process.
- **Delegated Administration** – Decentralize operational governance and balance management workload by delegating administrative control of the workspace with role-based access and permissions to the defined users.
- **Workspace Report** – View, manage and oversee all renewal task processes and auto import history in the tenant through a single point of entry with custom filters and built-in views.
- **My Tasks** – View all your tasks in a single pane of glass with full visibility of the task summary, requester, status, type, and due date.

Approval Process

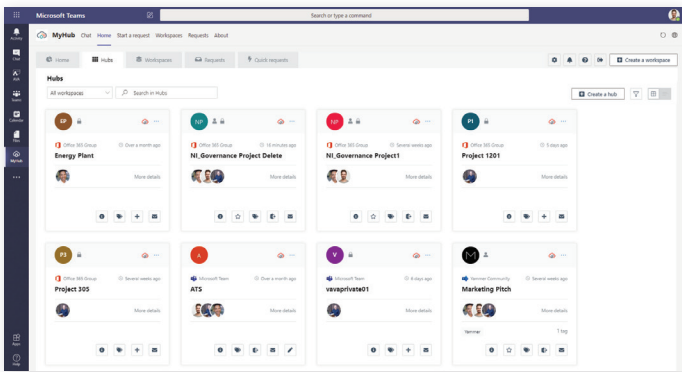
- **Multi-Stage Approval Process** – Run multiple stages of approval with dynamic, role-based assignments and escalation for all provisioning, content management, and permissions management services.
- **Conditional Approval Process** – Define multiple possible approval chains for a single service. Dynamically route the request through required users based on attributes associated with the request or the requestor—such as region, department, or sensitivity level.
- **Timed Escalation** – Designate an alternate approver to take over tasks that have not been resolved after a designated period of time.
- **Zero-Stage Approval Process** – Automatically process services that do not need approval while ensuring compliance with policies and auditing all services.
- **Actionable Messages Approval Process** – Approve or reject tasks directly in email messages with one simple click.

AvePoint Cloud Management Integration

- **Automatic Provisioning** – Automatically apply appropriate change management, permissions, and lifecycle management policies to Microsoft 365 Groups, Teams, SharePoint Online sites, or site collections upon creation through automated policy assignment based on the requested service level.
- **Policy Enforcer Integration** – Automatically adjust unauthorized changes and configurations in features, permissions, and settings by applying up to 28 configurable Policy Enforcer rules and profiles to provisioned site collections.

MyHub Teams App

- **AvePoint MyHub** – A convenient one-stop-shop for managing existing Microsoft 365 workspaces and creating new ones—all from Microsoft Teams!
- **Workspace Management** – View and locate all your Microsoft 365 workspaces, mark as a favorite, manage membership, and access any of the workspace services, such as Files, Planner, Conversations etc., all with just a few clicks.
- **Workspace Hubs** – Create workspace hubs based on different criteria, such as purpose or topic, with multiple filters.
- **Workspace Classification** – Classify Teams, Groups, SharePoint sites, and Yammer communities with personal tags.
- **Cloud Governance Integration** – Perform Cloud Governance provisioning, recertification, and lifecycle tasks without leaving Teams.



Seamless Microsoft 365 User Experience

- **Governance Panel for Microsoft 365 Sites** – Enable end users to request resources for provisioning, permissions, lifecycle, and content management directly within SharePoint Online Classic Team Sites, Communication Sites, and Microsoft 365 Group Modern Team Sites, all without signing into AvePoint Online Services.
- **Site Information Card** – Display associated site information such as site contact, lease quota, and available services on the SharePoint Online site collection homepage.
- **Policy Bar** – Provide a visual indication of policies and service levels within SharePoint Online site collections.

Yammer Integration

- **Embedded Yammer Feeds** – Automatic creation of a Yammer group and embedding of Yammer feed during site collection provisioning.

ServiceNow Integration

- Using the Cloud Governance ServiceNow Integration App, end users can now use the ServiceNow platform to submit creation requests and change requests for Microsoft 365 Teams, Groups, and Site Collections.

Other Application Integration

- Use the Cloud Governance admin API to obtain programmatic access to all Cloud Governance core services and data or call into a Cloud Governance webhook for real time notifications with your own or third party applications.
- The Power Automate connector enables you to automatically trigger actions in Cloud Governance or your own solutions to quickly and easily integrate Cloud Governance through our connector templates.

Information Architecture Extensibility & Customization

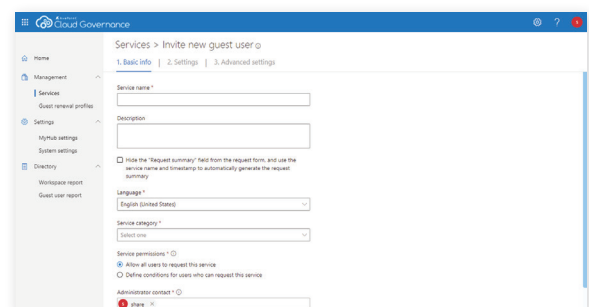
- **Client API** – Bridge the gap between existing IT service management systems and SharePoint Online.
- **Software Development Kit (SDK)** – Create custom Policy Enforcer rules or profiles and integrate with more than 40 different event triggers using the rules SDK.

Simplified Request Management & Questionnaire

- **Service Request Setup Assistant** – Help quickly set up service requests with an approval process, renewal profile, lifecycle configuration and policies.
- **Questionnaire** – Customizable request questionnaires gather end user information—such as roles and associated permission levels, as well as business requirements—to guide them to the service form they need. A simplified service catalog ensures the right policies are applied and users only access services available to them.
- **Request Report** – A new report that provides a consolidated view of all submitted requests and tasks. Delegate out common administrative actions such as approve, reject, re-assign and skip to improve operational efficiency when managing requests.

Enforce Organizational Policies

- **Policy Configuration** – Define policies, metadata, approval processes, permissions, and auditing parameters associated with SharePoint Online or Microsoft 365 Groups. Retroactively apply governance policies for existing sites and site collections to align all services with corporate governance policies.



Microsoft 365 Groups, Teams and Yammer Governance

- **Request-Driven Microsoft 365 Groups Provisioning** – Create Microsoft 365 Groups through a managed, self-service process. Allow administrators to define policies for Microsoft 365 Groups privacy, lifecycle, and membership.
- **Managed Provisioning of Microsoft Teams** – Fully integrate Microsoft Teams into your managed provisioning strategy by using the "Create Microsoft Teams" service. Enable business users to quickly provision and configure Teams with predefined Teams templates in compliance with corporate policies. Allow granular permission control of Private Channel creation.
- **People Picker Filter** – Define policies to control what users and groups are available to search in Cloud Governance people pickers, allowing more granular control on what users are available when submitting new requests and completing renewal tasks.
- **Yammer Provisioning Control** – Govern the provisioning of Yammer communities through Cloud Governance in a controlled, self-service manner. Allow administrators to apply policies, specify membership, restrict external sharing, deploy end of life processes, and access comprehensive workspace reports. For Yammer communities that were created outside Cloud Governance, use Yammer community automatic import profile to automatically discover and manage the communities.
- **External Sharing Controls for Microsoft Teams and Microsoft 365 Groups** – Enable the appropriate level of external collaboration with policy driven external sharing controls for Microsoft Teams/Microsoft 365 Groups and their associated Team sites. End users can safely collaborate with external parties based on the use and type of information stored their workspaces.
- **Guest User Governance** – Create new Azure Active Directory guest users and specify what Microsoft Teams or Groups the guest user should be added to in a single self service request form. Provide an automated renewal process of the guest user's membership, contacts and metadata to comply with security policies. Guest user reports provides administrators a quick view into all the guest users in your tenant. End users can see a report of invited guests they are responsible for in the My guest users report.
- **Guest User Renewal** – Periodically renew or define the duration of guest users, escalate renewal jobs with an option to remove guest user from Azure Active Directory or block guest user from signing in to ensure compliance. Create a custom message in the guest user renewal process to help end users understand their responsibilities when reviewing guest user access during the renewal process.
- **Guest User Import** – Automatically discover and apply governance policies to guest users in your Azure AD tenant. Automate ongoing management of guest users by assigning a primary contact person, capture and enforce a review process to validate guests user access to M365 workspaces.

- **Private Channel Renewal** – Allow team owners, private channel owners and team contacts to renew the ownership and membership for each private channel during the parent team renewal process.
- **Sensitivity Label Integration** – Leverage sensitivity labels to control external sharing policies and privacy settings services for Microsoft Teams, Groups, and SharePoint sites.
- **Microsoft 365 Groups Lifecycle Management** – Provide business users with granular control over the lifecycle of their Microsoft 365 Groups with actions including delete, extend group lease, and change group policy.
- **Primary and Secondary Group Contact** – Assign primary and secondary business users for Microsoft 365 Groups to enforce accountability and enable appropriate change management approvals without granting elevated levels of privilege or native Group ownership. Enable automated ownership election if any of the owners are deactivated.
- **Recertification of Group Membership** – Ensure that the Microsoft 365 Groups members and owners remain current and accurate with periodic recertification tasks to validate or modify membership or ownership details.
- **Automated Inactivity Tracking** – Generate a Microsoft 365 Groups inactivity threshold task if the group has been inactive for a certain amount of time, allowing automatic deletion of the group.
- **Group Naming Schemes** – Allow flexible naming rules for different types of Microsoft 365 Groups so that organizations can better understand their purpose and ownership.
- **AvePoint GroupHub Integration** – Leverage the Microsoft 365 App Launcher for direct and easy access to Microsoft 365 Group provisioning, classification, and lifecycle services from within the AvePoint GroupHub application.

The screenshot displays the 'Policy Management > Create Policy' interface in the Microsoft 365 Governance console. The 'Microsoft 365 Group Site Quota Threshold' policy is selected, showing configuration options for quota thresholds, deactivation, and recertification. A red box highlights the 'Recertification or Renewal' section. Below this, the 'Group/Team Inactivity Threshold' section is expanded, showing options to enable inactivity thresholds, set approval processes, and configure warnings and lifecycle actions.

Microsoft 365 Group Site Quota Threshold

Choose whether to enable a quota threshold for Microsoft 365 Group team sites. A quota threshold is the maximum response that a group team site can use. If you enable the group team site quota threshold, you must define the threshold and add recipients who will receive the most notification alert from specifying users in the requests, you can also enter 5 to select from the following options.

Deactivated Group/Team Owner Election

Choose whether or not to enable an automated ownership election process for Microsoft 365 Groups or Microsoft Teams. With this option enabled, an ownership election process will be automatically started if the primary owner or secondary owner is deactivated.

Recertification or Renewal

Choose whether to enable recertification or renewal. Recertification enables periodic review of group team site permissions and/or group team membership in repeated tasks. Renewal enables periodic review of group team site permissions, group team membership, group team metadata, and/or group team owners in one task. The renewal flag will be removed in the selected recertification profile or renewal profile.

Group/Team Inactivity Threshold

Choose whether to enable the inactivity threshold for Microsoft 365 Groups/Microsoft Teams. With this option enabled, an inactivity threshold task will be generated if the group/team has been inactive for a specified period. Inactivity is defined as no changes to the group/team settings and no new or modified content in the group team sites, files, notebook, calendar, mailbox or conversations. The inactivity threshold task will be assigned to the approvers asking if they would like to keep or delete the groups/teams and the corresponding team sites or archive the team. You can enable an inactivity threshold warning to remind the approvers specified in the selected approval process of the inactivity threshold in advance. You can also enable an additional lifecycle action to escalate if the inactivity threshold task is overdue. The additional action can be "Delete" or "Archive Team".

Note: If you enable automatic deletion of the group/team, you must activate the built-in Group/Team Lifecycle Management - Delete Service. If you enable automatic archiving of the team, you must activate the built-in Team Lifecycle Management - Archive Service. If you enable the notification upon the deletion or archiving, apart from specifying users as the e-mail notification recipients, you can also enter 5 to select from the following options.

Enable group/team inactivity threshold

☒ Generate a group/team inactivity threshold task when the group/team has no activities for [] Day(s)

Approval Process:

Select One

Create New

Enable group/team inactivity threshold warning

Reminder profile: remindemaya

Create New

Enable an additional group/team lifecycle action

☐ Enable automatic deletion of the group/team

☐ Enable automatic archiving of the team

[View Available Roles](#)

Supported Service Request Types

Microsoft 365 Provisioning

- **Create Site/Site Collection** – Automatically provision policy-based SharePoint Online site collections (Classic and Modern), sites, hub sites, lists, and libraries.
- **Dynamic Service** – Create request forms with logic branching, in form validation, and context aware defaults to provide ultimate flexibility in provisioning processes. Create easy to submit forms that are as flexible as the provisioning requirements are complex.
- **Policy Enforcer Integration** – Automatically apply Policy Enforcer profiles and associated rules upon provisioning of sites and site collections. Unauthorized changes and configurations in features, permissions, and settings can be automatically adjusted back based on the preconfigured rules.
- **Microsoft 365 Multi-Geo Support** – With Multi-Geo support for Microsoft 365, ensure the provisioning of workspaces and associated content meet data residency requirements through a managed provisioning process.
- **Site and Site Collection Import** – Scan existing sites, communication sites, and site collections into an Excel file, select relevant sites, and provide policy as well as site contacts to deploy in AvePoint Cloud Governance.
- **Site Contact** – Configure primary and secondary contacts for relevant sites to enforce site ownership and accountability.
- **Hub Site Integration** – Allow enabling hub sites when creating site collections, convert existing site collection to a hub site, or associate a site collection with a hub site.
- **Central Policy Management** – Centralize and reuse policy definitions to enhance consistency across service requests for storage management, site leases, and inactivity with flexible policy wizard creation.
- **Managed Metadata Service Integration** – Enforce corporate taxonomy with the ability to integrate with the Managed Metadata Service.
- **Auto-URL Generation** – Standardize URL formats across the SharePoint Online environment.
- **Temporary Permissions** – Assign users with custom or temporary permission levels during site and site collection provisioning—automatically removing permissions on a set expiration date.
- **Create Microsoft 365 Users** – Allow business users to request provisioning and de-provisioning of Microsoft 365 users.

The screenshot shows the 'Create Service' wizard in the AvePoint Cloud Governance interface. The 'Manager of Office 365 User' section is active, showing a 'Manager of Requester' dropdown set to 'Finance Team' and an 'Assign by Business User' checkbox. The 'Group Assignment' section is also visible, showing a 'Finance Team' dropdown and an 'Assign by Business User' checkbox.

The screenshot shows the 'Create New' service selection screen in the AvePoint Cloud Governance interface. A red box highlights the 'Provisioning' category, which includes options like 'Create Site Collection', 'Custom Service', 'Create Site', 'Create Library/List', 'Create User', and 'Create Group/Team'.

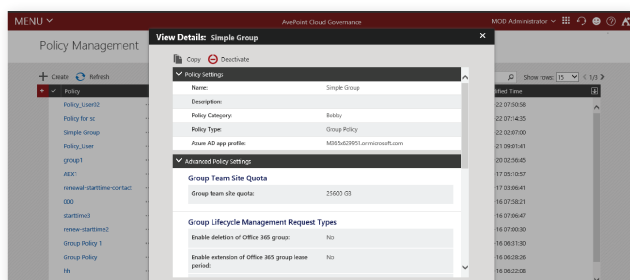
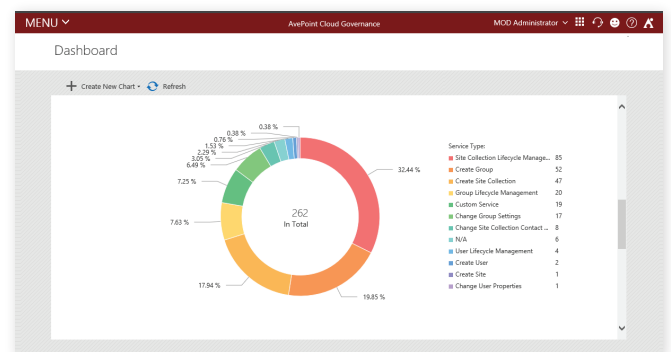
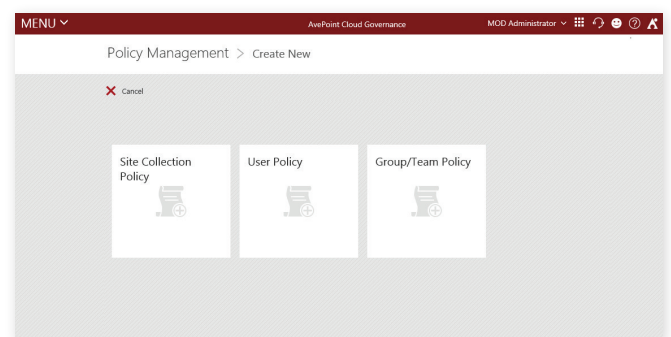
The screenshot shows the 'Create Service' wizard in the AvePoint Cloud Governance interface. The 'Site Collection Template' section is active, showing a 'Select template' dropdown set to 'Team site' and a 'Default selection' dropdown set to 'Select One'. The 'Hub Site' section is also visible, showing an 'Enable hub site' checkbox.

The screenshot shows the 'Create Service' wizard in the AvePoint Cloud Governance interface. The 'Group or Team' section is active, showing a 'Choose if an Office 365 Group or a Microsoft Team will be created' dropdown set to 'Office 365 Group'. The 'Privacy' section is also visible, showing a 'Public - Anyone can see group/team content' dropdown and an 'Assign by Business User' checkbox.

The screenshot shows the 'Dynamic services > Create dynamic service' wizard in the AvePoint Cloud Governance interface. The 'Basic info' tab is active, showing a 'Privacy' dropdown set to 'Public' and a 'Classification' dropdown set to 'OFFICIAL - SENSITIVE'. The 'Advanced settings' tab is also visible, showing a 'What do you want to add?' section with a 'Search in Content' dropdown and a 'Condition' dropdown.

Microsoft 365 Management

- **Permissions Management Services** – Grant, transfer, or clone custom permission assignments directly or optionally and enforce through SharePoint group memberships.
- **Grant Permissions Level Control** – Set permission level limits for site and site collection provisioning services as well as Grant Permissions Services to granularly enforce permissions control.
- **Grant Permissions Services** – Enable business users to request permissions to a specified SharePoint object with approval processes and automated assignment upon final approval.
- **Azure Active Directory Attributes** – Leverage standard and custom Azure Active Directory (AAD) attributes as variables in the approval process, group naming conventions, to control access to service requests and capture additional metadata during request or import process.
- **Permissions Management Services** – Give end users a managed process to grant, change, clone, transfer, or remove user and group permissions, as well as perform SharePoint group membership changes.
- **Temporary Permissions Services** – Temporarily grant users and/or groups access to sites based on end user requests for a certain period of time before automatically expiring.
- **Site Permissions Inheritance** – New sites automatically use permissions from the site or site collection in which they are created—including existing user groups—to proactively enforce existing security structures for ease of maintenance and administration.
- **Microsoft 365 Workspace Auto-Import** – Automatically imports Microsoft 365 workspaces created outside of Cloud Governance and identifies ownership, classification, contacts, and policy of each workspace to balance productivity and compliance with corporate policy.
- **Monitoring and Reporting** – Generate .csv or .xls reports to provide chargeback calculations for departments or functional units.
- **Dashboard** – Understand KPI metrics and daily workloads contained within AvePoint Cloud Governance with built-in reports including Site Collection Status, Service Types of Tasks, and Task Status Distribution.
- **Power BI Template** – The Power BI report template provides access to Cloud Governance data that can be fully customized to suit different reporting needs.
- **Library Template** – Ensure document libraries are created with the proper content types, columns, default metadata values and more. Library templates provide a repeatable and manageable process to script out custom deployment settings for a document library.
- **Microsoft 365 Group and Sites Ownership Reports** – End user reports provide better insight into which Microsoft 365 Groups and Sites the user is responsible for, along with relevant information about those group and sites, such as custom metadata.
- **Policy Enforcer Integration** – Automatically apply Policy Enforcer profiles and associated rules upon provisioning of sites and site collections. Unauthorized changes and configurations in features, permissions, and settings will be automatically adjusted back based on the preconfigured rules.
- **Terminology Management** – Easily integrate within your existing organizational policies and processes, allowing the ability to rename key roles within the application to terms your users already know.
- **Email Template Management** – Ensure a consistent user experience across the system interface and email notifications by configuring email templates to match the end users preferred language, as well as customize email banners, references and branding. A centralized dashboard makes it easy to create, view and manage all the email templates in your environment.
- **Email Notification Queue** – Monitor and control end user notifications via a report that provides administrators an overview of upcoming emails, so they can block, delay or release them to users.



Microsoft 365 Lifecycle

- **Site Collection/Site Lifecycle Management** – Services for managing site collections and sites allow business owners to make changes to classification and policies, extend site lease and quota, move content, and adjust permissions.
- **Automated Locking and Deletion of Site Collections** – Site collections that expire and are not renewed can be automatically set to “no access” or “read-only” status, with additional options to delete or archive after locking.
- **Site Lifecycle Timeline** – Provides an at-a-glance dashboard view of all site governance activities since creation.
- **Inactivity and Lease Expiration Alerts** – Notifies business owners when their sites have not been accessed for a specific period of time, or if the site lease is about to expire. Reduce unnecessary storage by giving site owners the ability to end-of-life their sites and archive as a record on lower-tier storage.
- **Deactivated Owner Detection** – Scheduled scans of Azure Active Directory will detect deactivated owner accounts to kick off a new election process to designate a new owner.
- **Microsoft 365 User Lifecycle Management** – Trigger multiple automated Microsoft 365 user lifecycle management actions ranging from off-boarding, extension of contract term, policy change, and unblocking.
- **Teams Lifecycle Management** – Allow business users to archive a Team with support to remove all team members, change team owners and team site permissions, and restore a Team from an archived state. Automatic archival is now an additional Team lifecycle action.
- **Multi-stage Lifecycle Management** – Utilize the automated escalation process to restrict access to Groups or archive a Team when a lifecycle task is not completed within a specific period of time. Choose to delete the Group or Team after the first stage escalation has been completed to enforce proper end-of-life management of the workspace.

Select Users

Configure the scope of Microsoft 365 users or groups whose permissions can be changed. Choose **Allow any user/group** to allow business users to select any Microsoft 365 user or group to change permissions.

- Peer - The requester shares the same manager as the selected source user.
- Direct report - The requester is the manager of the selected source user.
- Indirect report - The requester is a higher level manager to the selected source user's manager.

*Note: Peers, direct reports, and indirect reports are unsupported for locally authenticated users and SharePoint Online dedicated instance users.

Change Type

Choose to remove the permissions from users/groups or change the permissions of users/groups. Choose whether to exclude permission levels from the permission review task. If you enable this option, any user/group with the selected permission levels will not be included in the report associated with the permission review task. The permission levels displayed here are the ones configured in **Settings > SharePoint Permission Level Management**. Select an e-mail template to send the notification e-mail that notifies the requester to review or change permissions in the generated permission review task.

☒ Allow any user/group
☐ Allow peers and direct or indirect reports
☐ Allow direct or indirect reports

☒ Remove Permissions
☐ Change Permissions

Assign by Business User
☒ Require Business User Input

☐ Exclude specified permission levels from the permission review task

*Advanced settings:
Notify the requester about the permission review task:
Select One

Save Save and Activate Cancel

Lifecycle Management Actions

Select a lifecycle management action:

- Extend Site Collection Lease - Allows business users to request extension of a site collection lease.
- Delete Site Collection - Allows business users to request deletion of a site collection.
- Archive Site Collection - Allows business users to request archiving of a site collection.
- Change Site Collection Policy - Allows business users to request a site collection policy change.
- Unlock Site Collection - Allows business users to request unlocking of a locked site collection.
- Lock Site Collection - Allows business users to request locking of a site collection.
- Change Site Collection Quota - Allows business users to request a change of storage quota for a site collection.

* Note: Lifecycle management actions for this service depends on the related settings configured in the site collection policy associated with the site collection.

Select One

- Extend Site Collection Lease
- Delete Site Collection
- Archive Site Collection
- Change Site Collection Policy
- Unlock Site Collection
- Lock Site Collection
- Change Site Collection Quota

View Details: Change Site Owner

Copy Deactivate

Service Settings

Name	Change Site Owner
Description	Make the Request Summary field from the request form and use the service name and description to automatically generate the request summary
Language	English (English)
Service Category	Administration
Department	Department
Assign to	Business User Require Business User Input
Service Type	Change Site Collection Contact or Administrator
Service Definition	Available in service catalog like Start a Request panel
Available as a questionnaire result	No
Service Permissions	Users must meet the service permissions below Define conditions for users who can request this service

For a comprehensive list of new features in this release, please view our AvePoint Cloud Governance [Release Notes](#).

How to Buy AvePoint Products

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