

Office 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, 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 and Office 365 Groups memberships on a scheduled basis. Changes to permissions and Groups 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 and Office 365 Groups with dynamic look up rules to assign proper contacts for the renewal process.

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 Office 365 Groups, 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.

Seamless Office 365 User Experience

- **Governance Panel for Office 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 Office 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 associated 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.

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

- **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.

Enforce Organizational Policies

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

Office 365 Groups Governance

- **Request-Driven Office 365 Groups Provisioning** – Create Office 365 Groups through a managed, self-service process. Allow administrators to define policies for Office 365 Groups privacy, lifecycle, and membership.
- **Managed Provisioning of Microsoft Teams** – Fully integrate Microsoft Teams into your managed provisioning strategy by using the “Create Group” service, balancing productivity and compliance with corporate policy.
- **Office 365 Groups Lifecycle Management** – Provide business users with granular control over the lifecycle of their Office 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 Office 365 Groups to enforce accountability and enable appropriate change management approvals without granting elevated levels of privilege or native Group ownership.
- **Recertification of Group Membership** – Ensure that the Office 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 an Office 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 Office 365 Groups so that organizations can better understand their purpose and ownership.
- **AvePoint GroupHub Integration** – Leverage the Office 365 App Launcher for direct and easy access to Office 365 Group provisioning, classification, and lifecycle services from within the AvePoint GroupHub application.

The screenshot shows the 'Create Policy' page in the AvePoint Cloud Governance console. It is divided into three main sections:

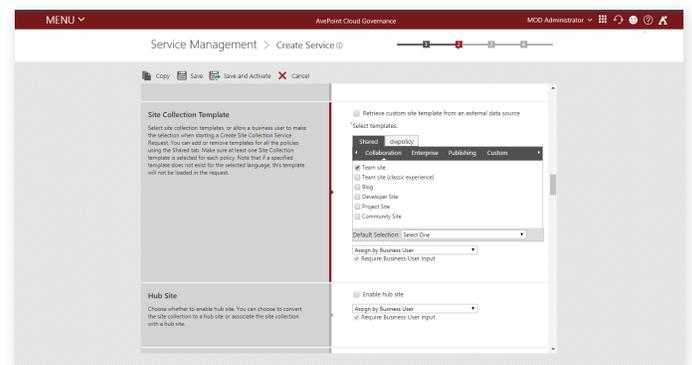
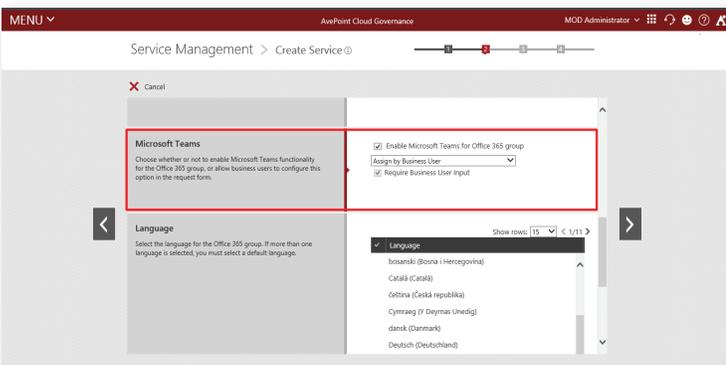
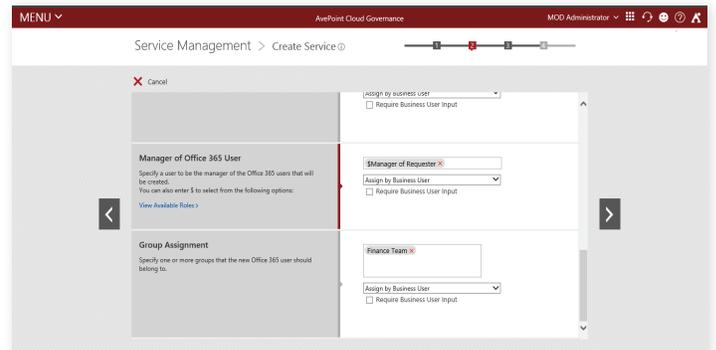
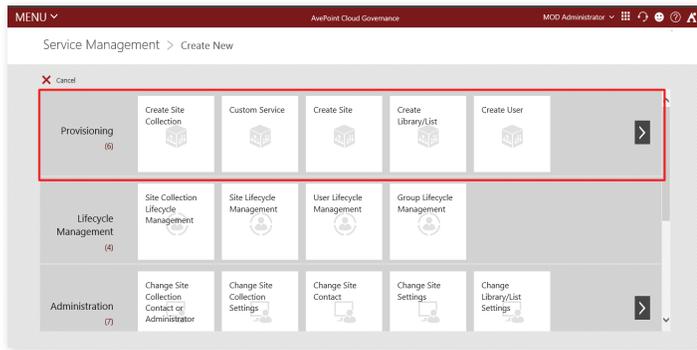
- Office 365 Group Team Site Quota Threshold:** Includes a checkbox to 'Enable Office 365 group team site quota threshold' and a 'Recertification or Renewal' section with a 'Recertification profile' dropdown menu.
- Office 365 Group Inactivity Threshold:** Includes a checkbox to 'Enable Office 365 group inactivity threshold', a 'Generate an Office 365 group inactivity threshold task when the group has no activities for' field (set to 10 days), an 'Approval Process' dropdown (set to Default Approval Process), and a 'Reminder profile' dropdown (set to reminder1).

Recertification or Renewal

Choose whether to enable recertification or renewal. Recertification enables periodic review of Office 365 group's permission and/or membership in separated tasks. Renewal enables periodic review of Office 365 group's permission, membership, metadata, and/or group contacts in one task. The content that will be reviewed is specified in the selected recertification profile or renewal profile.

Office 365 Provisioning

- **Create Site/Site Collection** – Automatically provision policy-based SharePoint Online site collections (Classic and Modern), sites, hub sites, lists, and libraries.
- **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.
- **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 Office 365 Users** – Allow business users to request provisioning and de-provisioning of Office 365 users.

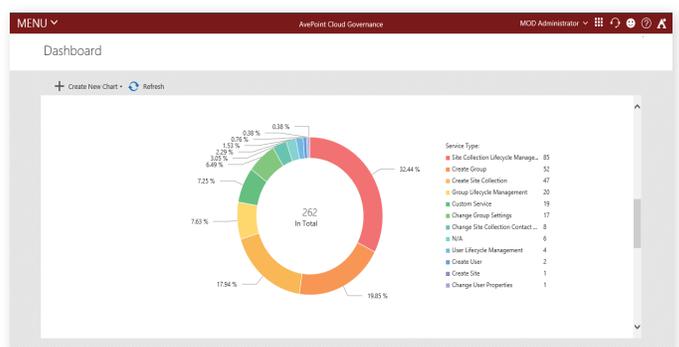
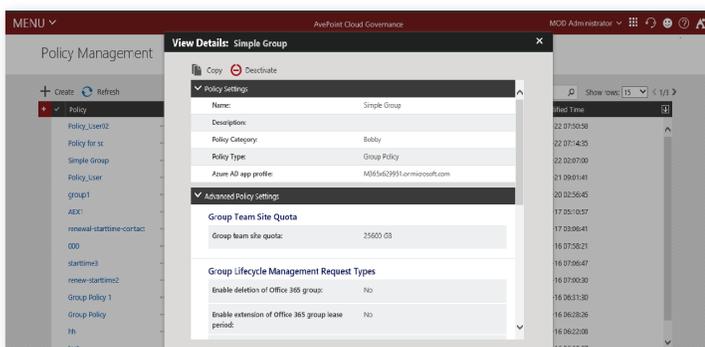
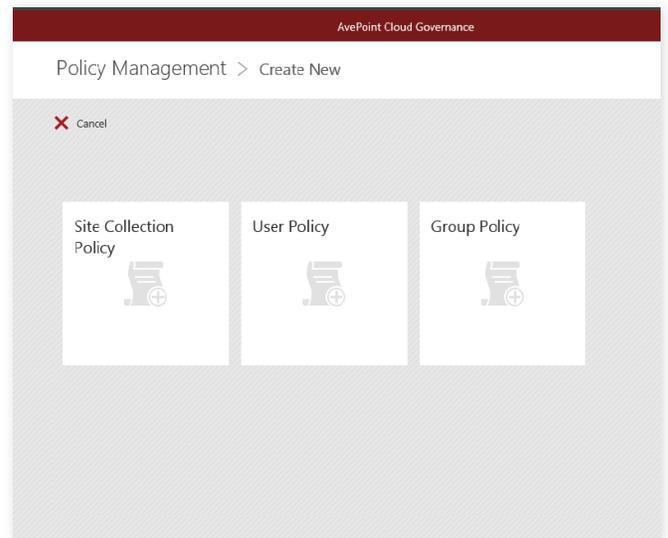


Office 365 Management

- **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.
- **Office 365 Workspace Auto-Import** – Automatically imports Office 365 workspaces created outside of Cloud Governance and identifies ownership, classification, and policy of each workspace to balance productivity and compliance with corporate policy.
- **Site Lifecycle Timeline** – Provides an at-a-glance dashboard view of all site governance activities since creation.
- **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.
- **Office 365 Group and Sites Ownership Reports** – End user reports provide better insight into which Office 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.
- **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

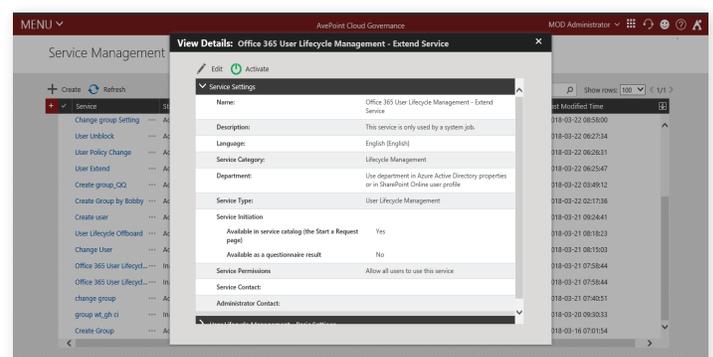
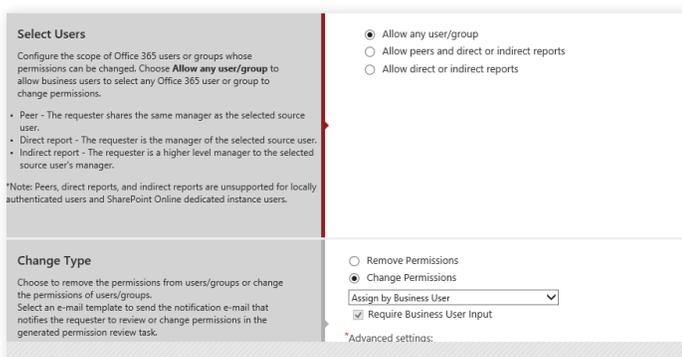
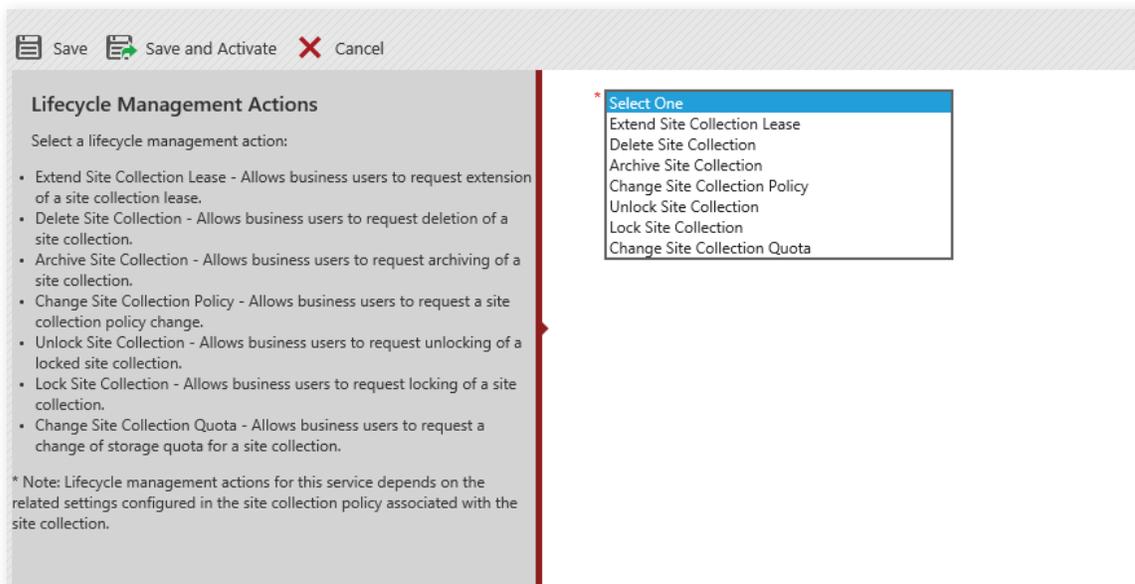
expire. Reduce unnecessary storage by giving site owners the ability to end-of-life their sites and archive as a record on lower-tier storage.

- **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.
- **Office 365 User Lifecycle Management** – Trigger multiple automated Office 365 user lifecycle management actions ranging from off-boarding, extension of contract term, policy change, and unblocking.
- **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 Localization** – Ensure a consistent user experience across the system interface and email notifications by configuring email templates to match the end users preferred language.



Office 365 Lifecycle

- **Permissions Management Services** – Grant, transfer, or clone custom permission assignments directly or optionally and enforce through SharePoint group membership.
- **Grant Permissions Level Control** – Set permission level limits for site and site collection provisioning services as well as Grant Permission services to granularly enforce permission control.
- **Grant Permissions Services** – Enable business users to request permissions to a specified SharePoint object with approval processes and automated assignment upon final approval.
- **Temporary Permissions Services** – Temporarily grant users and/or groups access to sites based on end user 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.



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

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