

Creating a New Provisioning Definition for a Site

Note

You must create Site definitions before you create Site Collection definitions. If you do not create site definitions first, there will be no definitions available for you to select from the Site Definition list when you create a new Site Collection definition.

Important!

The **Show advanced** checkbox in the lower left corner of the wizard pages displays some additional features in the wizard. These features are intended to be used only by Gimmel Services, in order to support advanced Provisioning scenarios.

To create a new Provisioning definition for a site, follow these steps:

1. Click add a definition on the Provisioning Administration Dashboard. The Create Provisioning Definition Wizard displays, starting on the **General Settings** page.

Provisioning Definition › Create

The screenshot shows the 'General Settings' page of the Provisioning Definition Wizard. On the left is a navigation pane with a 'Progress' section and a list of settings categories: General Settings (highlighted), Lists & Libraries, Views, List Defaults, Library Defaults, Content Type Defaults, Features, Add-ins, Pages, Web Parts, Site Structure, Custom Properties, Custom Actions, Administrative, Roles & Ownership, and Decommissioning. At the bottom of the pane is a 'Show advanced' checkbox. The main content area is titled 'General Settings' and contains the following fields and options:

- Definition Title ***: A text input field.
- Definition Description**: A larger text input field.
- Site Type ***: Radio buttons for 'Site Collection' and 'Site' (selected).
- Site Template ***: A dropdown menu with 'Team Site' selected.
- Language**: A dropdown menu with 'English' selected.
- Provisioned Site Address**: Radio buttons for 'Force Standard URL' (selected) and 'Allow Custom URL Assignment'.
- Provisioning Workflow**: A dropdown menu with 'None' selected.
- Visibility**: A checkbox for 'Show in Provisioning Request Form' which is checked.

At the bottom of the form are four buttons: 'Previous', 'Next', 'Save & Close', and 'Cancel'.

2. Enter these required settings (indicated by a blue asterisk):

- **Definition Title:** Enter a unique name for the definition.

Important!

Gimmel recommends that you provide a definition title that is intuitive, and a description that is detailed enough so that end-users will be able to select the most appropriate definition when they Provision a site or site collection.

- **Site Type:** Select **Site** for the Site Type.
- **Site Template:** Select a template that the newly-created site/site collection will use. The template options vary, depending on the site type you select above. **Note:** Site templates marked as **Root Web Only** can only be used as the root web for a site collection.

3. Enter the remaining optional settings:

- **Definition Description:** Enter a description for the site definition.
- **Language:** Select the preferred site language from the Language drop-down list. The Provisioning system queries the language packs installed on your SharePoint system.
- **Provisioned Site Address:** Select a standard URL or select to allow a custom URL assignment (URL will be added by the user when requesting a site/site collection). By default, the standard URLs consist of the following formats (and are only displayed when the user is requesting a site):
 - **Site Collection:** <http://internal access mapping/sites/site name> with no spaces (Path-based URL setting)
 - **Site:** <http://internal access mapping/sites/site collection name/site name> with no spaces
- **Provisioning Workflow:** Select the desired workflow. This option enables individuals to review and approve a request before the timer job creates the site/site collection.

Note

The options available for **Provisioning Workflow** are based on the workflows that are applied to the Provisioning Requests list. If you want a Provisioning request to go through a workflow instead of being provisioned automatically, you can add a workflow to the request list, which will be reflected in this drop-down. If you choose an option from the drop-down other than "None", then the status of a request is set to "Awaiting Workflow" when it is requested by a user instead of "Ready to Provision". The workflow you define is then expected to set the status of the request to "Ready to Provision" if it is approved. The Provisioning engine will not begin provisioning a request until the status is "Ready to Provision".

For more information on workflows, see [Understanding Provisioning Workflows](#).

- **Visibility:** Select whether or not you want the new definition to show or not show in the "Choose Definition" section of your Provisioning requests.
5. Click **Next**. The Lists & Libraries page displays, enabling you to define which views, lists and libraries, and content type defaults are created when a site/site collection is provisioned with this definition.

Provisioning Definition › Create

Progress

General Settings ✓

Lists & Libraries

- Views
- List Defaults
- Library Defaults
- Content Type Defaults
- Features
- Add-ins
- Pages
 - Web Parts
- Site Structure
- Custom Properties
- Custom Actions
- Administrative
- Roles & Ownership
- Decommissioning

Show advanced

Lists & Libraries for **Human Resources Storefront**

Hide step ⓘ

Add and configure lists and libraries to create when a site is provisioned.

Add a List or Library

Access App ▼ ⓘ

Add

Selected Lists

Previous Next Save & Close Cancel

5. Click the **Add a List or Library** drop-down list and select the desired lists and libraries you want to add to the definition. You can add as many lists/libraries as you want, and you can rename them to control how they appear in the site.

Note

The **Hide Step** checkbox in the upper right corner of the wizard pages enables you to hide part of a definition when a user requests a new site collection/site. For example, you can create a definition for a site and not want the user who requests a new site to be able to make any changes to the lists and libraries that will be created in the site. In this case, click the **Hide Step** checkbox on the Lists & Libraries page when creating the definition. As a result, users will not see this page when they create a request based on that definition.

The **Hide Step** checkbox defaults to “checked” (and grayed out) for the List Defaults, Library Defaults, Content Type Defaults, Administrative, and URL Settings (for site collections) pages because these options are never presented to the end-user.



Note

If you want to rename a list or library, enter the new name in the field. The application does not confirm the new name; it will accept any name that you enter in the field as long as it is not a duplicate.

The information icon (i) to the right of the **Add a List or Library** drop-down list indicates that a list or library has a dependency, such as a feature. If you add this specific list or library, its dependent feature will also be added to the definition on the **Features** page, under **Features to Activate**. This prevents you from adding lists/libraries that depend on a feature without actually having the feature.

6. Click **Add**. Your choices display in the Selected Lists box, and a Content Types section displays on the right side of the screen.

Note

The icons   that display to the right of the selected lists or libraries indicate the following:

X – Removes the item from the list.

Locked/Unlocked – This option enables Admins to make the inclusion of a list or library mandatory. If the icon displays as locked, users can't remove the item when they request a site. If the icon displays as unlocked, users can remove the item when they request a site.

7. To associate a content type with the selected list or library, click a list or library from the Selected Lists box, and then click the **Content Types** drop-down list. The drop-down shows the Content Type groups in SharePoint. When you select one of these groups, you will see a list of content types in that group. Select the desired content type(s) from that group.
8. When your selection is complete, select each content type and click the down-facing arrow to move each item down to the **Associated Content Types** box to associate it with the selected list/library. If you want to assign a default content type, follow these steps:
 - a. Select the **Default Content Type** button next to the Associated Content Type you want to make the default.

- b. Click the lock icon if you want to make this content type mandatory. This cannot be removed by the user making a request. If this content type is also set as the default content type, the user will not be able to change it.

Provisioning Definition > Create

The screenshot shows the 'Lists & Libraries for Human Resources Storefront' configuration page. On the left is a navigation pane with 'Lists & Libraries' selected. The main area is divided into three sections: 'Add a List or Library', 'Selected Lists', and 'Content Types'. In the 'Add a List or Library' section, 'Document Library' is selected in a dropdown menu. The 'Selected Lists' section shows 'Calendar' and 'Document Library' as selected items. The 'Content Types' section has a dropdown set to 'Document Content Types'. Below this, a list of content types is shown, with 'Document' selected. A red box highlights the 'Document' row, which has a lock icon next to it. A tooltip with the text 'Default Content Type?' is displayed over the lock icon. At the bottom of the page are buttons for 'Previous', 'Next', 'Save & Close', and 'Cancel'. A 'Show advanced' checkbox is located in the bottom left of the navigation pane.

If you choose not to associate any content types with a list or library on this page, then any lists or libraries added here will inherit the content type defaults you define on the Content Type Defaults wizard page.

9. Click **Next**. The Views page displays, enabling you to select an existing view or create a new view for each list or library in your site.

Provisioning Definition › Create

Progress

Lists & Libraries : Views for Human Resources Storefront Hide step ⓘ

General Settings ✓

Lists & Libraries ✓

Views ✓

List Defaults

Library Defaults

Content Type Defaults

Features

Add-ins

Pages

Web Parts

Site Structure

Custom Properties

Custom Actions

Administrative

Roles & Ownership

Decommissioning

Show advanced

List & Libraries Choose a list... ▼

Choose a list or library to create a view for.

Previous Next Save & Close Cancel

10. To select an existing view, follow these steps:

- a. Select a list or library whose view(s) you want to display from the List & Libraries drop-down list. Available views for that list or library display across the page, below the Lists & Libraries drop-down list.

Lists & Libraries : Views for Human Resources Storefront

List & Libraries Site Links ▼


Choose a list or library to create a view for.

All Links - List (Default View) All Links Quick Links Resources +


- b. Select the name of the view you want to display.
- c. If desired, edit the view settings and then continue with step **12**. If no views are associated with the list or library you selected, continue with step **11** to create a view.

11. To create a new view, follow these steps:

- a. Select a list or library that you want to create a new view for from the List & Libraries drop-down list.

- b. Click the **Add a New View** icon (). The New View page displays.
- c. Complete the New View page by entering the following settings:
 - i. **Name:** Enter a name for the new view. The View URL will automatically populate with this new view name.
 - ii. **Columns:** Add columns that you want to show in this view by selecting a column in the Available Columns box and clicking the right arrow box to move the selected column over to the Selected Columns box. After you select your columns, you can specify their order by clicking the up and down arrows to the right of the Selected Columns box.
 - iii. **Display Template:** Select a display template for this view from the Available Templates list, and enter any corresponding template properties as desired under the Template Properties section on the right.

Note

You can see a preview image of each template by mousing over the Preview Image icon () that displays on the right side of each template name. For more information on Preview Images, see the *Display Template Manager Configuration Guide V5.2, "Appendix C: Deploying Display Template Preview Images"*, available on the Gimmel software download site.

Note



The **Display Template** setting displays only if Gimmel's Display Template Manager (DTM) is installed. DTM must be deployed on the site where the Provisioning app is deployed since DTM can be installed in multiple locations.

If your Provisioning site is different than your Governance Hub site, DTM must be added to **both** sites in order for the DTM files to be loaded into the Resource Gallery on the Governance Hub site.

- iv. **Sort:** Select up to two columns to determine the order in which the items in the view will display.

- v. **Filter:** Select filter options to show all items in this view, or set parameters to filter the items that will display.
- vi. **Group By:** Group items based on up to two columns' values. Choose whether these groups display in ascending or descending order, in a collapsed or expanded format, and set the number of groups displayed per page.
- vii. **Folder:** Choose to display items in folders or in a flat structure. You can also choose to restrict this view to the top level folder, or carry it into all folders.
- viii. **Item Limit:** Set a limit to the number of items displayed per page.

Note

To create additional views, scroll to the top of the page and click the **Add a New View** icon (). Each new view will display across the top of the page. Click the lock icon () to make a view mandatory and click the **X** icon to remove a view.

12. Click **Next**. The List Defaults page displays, enabling you to set default settings for all lists requested at the time of site provisioning.

Provisioning Definition › Create

The screenshot shows the 'Create' step of a provisioning definition for 'List Defaults for Human Resources Storefront'. The left sidebar contains a navigation menu with 'List Defaults' selected. The main content area is titled 'Lists & Libraries : List Defaults for Human Resources Storefront' and includes a 'Hide step' checkbox and an information icon. Below the title is the instruction 'Set the options used when a new list is provisioned.' The settings are organized into two sections: 'Versioning Settings' and 'Advanced Settings'. 'Versioning Settings' includes 'Content Approval' (set to 'No') and 'Version History' (set to 'SharePoint Default'). 'Advanced Settings' includes 'Allow items to be edited using the datasheet?' (set to 'SharePoint Default'). At the bottom, there are buttons for 'Previous', 'Next', 'Save & Close', and 'Cancel', along with a 'Show advanced' checkbox.

13. Select the List Defaults for the following sections:

- **Versioning Settings**
 - **Content Approval:** Choose whether or not items must be approved prior to being visible to site members. You can also apply a SharePoint Default, which may vary based on the Site Template you selected under **General Settings**.
 - **Version History:** Choose SharePoint default, No Versioning, or Create Major Versions. The SharePoint Default may vary based on the Site Template you selected under **General Settings**.
- **Advanced Settings**
 - **Allow items to be edited using the datasheet?:** Choose whether or not the list can be edited in Datasheet view. (This option only available on-premises.) You can also apply a SharePoint Default, which may vary based on the Site Template you selected under **General Settings**.

14. Click **Next**. The Library Defaults page displays, enabling you to set default settings for all libraries requested at the time of site provisioning.

Provisioning Definition ▶ Create

The screenshot shows the 'Library Defaults' configuration page for 'Human Resources Storefront'. The page title is 'Lists & Libraries : Library Defaults for Human Resources Storefront' with a 'Hide step' option. Below the title, it says 'Set the options used when a new library is provisioned.' The page is divided into two main sections: 'Versioning Settings' and 'Advanced Settings'. The 'Versioning Settings' section includes three dropdown menus: 'Content Approval' (set to 'SharePoint Default'), 'Version History' (set to 'SharePoint Default'), and 'Require Checkout' (set to 'SharePoint Default'). The 'Advanced Settings' section includes two dropdown menus: 'Make "New Folder" command available?' (set to 'SharePoint Default') and 'Allow items to be edited using the datasheet?' (set to 'SharePoint Default'). At the bottom of the page, there are four buttons: 'Previous', 'Next', 'Save & Close', and 'Cancel'. On the left side, there is a navigation pane with a 'Show advanced' checkbox.

15. Select the Library Defaults for the following sections:

- **Versioning Settings**

- **Content Approval:** Choose whether or not items must be approved prior to being visible to site members. You can also apply a SharePoint Default, which may vary based on the Site Template you selected under **General Settings**.
- **Version History:** Choose SharePoint Default, No Versioning, Create Major Versions, or Create Major and Minor (Draft) Versions. The SharePoint Default may vary based on the Site Template you selected under **General Settings**.
- **Require Checkout:** Choose whether or not items are automatically checked out when they are opened in Edit mode by a site member. You can also apply a SharePoint Default, which may vary based on the Site Template you selected under **General Settings**.

- **Advanced Settings**

- **Make “New Folder” command available?:** Choose whether or not the New Folder option is visible to site members. You can also apply a SharePoint Default, which may vary based on the Site Template you selected under **General Settings**.
- **Allow items to be edited using the datasheet?:** Choose whether or not the list can be edited in Datasheet view. (This option is only available on-premises.) You can also apply a SharePoint Default, which may vary based on the Site Template you selected under **General Settings**.

16. Click **Next**. The Content Type Defaults page displays, enabling you to select which content types you want to associate with a library or list in the event the user requesting a site does not select any.

Provisioning Definition › Create

The screenshot shows the 'Content Type Defaults' configuration page for a site named 'Human Resources Storefront'. The page title is 'Lists & Libraries : Content Type Defaults for Human Resources Storefront'. A 'Progress' sidebar on the left lists various configuration steps, with 'Content Type Defaults' currently selected. The main area contains a dropdown menu for 'Document Content Types' and a list of content types: Basic Page, Dublin Core Columns, Form, Link to a Document, List View Style, Master Page, Master Page Preview, Picture, Site Page, Web Part Page, and Wiki Page. A 'Default Content Types' panel on the right shows 'Document' selected. At the bottom, there are buttons for 'Previous', 'Next', 'Save & Close', and 'Cancel'. A 'Show advanced' checkbox is also present in the bottom left.

Note

When a user requests a new site, there is an option to add a list or library and apply a content type to it. If the user decides not to apply a content type during the request process, you can assign a default content type on the Content Type Defaults page that will replace the default content type of

the list or library the user selects. (For example, see the "Document" **Default Content Type** in the preceding figure.)

17. Select the desired content type(s) from the drop-down list on the left. The selections display in a list under the drop-down.
18. Select a content type and then click the right-facing arrow in the center of the page to move the content type over to the **Default Content Types** box.
19. Click **Next**. The Features page displays, enabling you to define which features are activated and deactivated when a site or site collection is provisioned.

Provisioning Definition > Create

The screenshot shows the 'Features for Human Resources Storefront' provisioning definition configuration page. On the left is a navigation pane with sections: Progress (General Settings, Lists & Libraries, Views, List Defaults, Library Defaults, Content Type Defaults), Features (Add-ins, Pages, Web Parts, Site Structure, Custom Properties, Custom Actions, Administrative, Roles & Ownership, Decommissioning), and a 'Show advanced' checkbox. The main area is titled 'Features for Human Resources Storefront' and includes a 'Hide step' icon. Below the title is the instruction: 'Select site collection and/or site features to activate or deactivate when a site is provisioned.' The 'Feature Scope' is set to 'Site' (radio button selected). The 'Available Features' list contains: 'Access App' (Access web app.), 'BICenter Data Connections Feature' (BICenter Data Connections Feature), 'Class My Site Host Content' (Adds class and group content to SharePoint My Site Host site collection.), 'Class Web Types' (Adds required content types to the SharePoint Class web.), and 'Community Site Feature' (This feature adds community functionality such as discussion categories, content and people reputation, and the members list. It also provisions community site pages which contain these lists and features.). The 'Features to Activate' list contains 'Getting Started' and 'Project Functionality'. The 'Features to Deactivate' list is empty. Navigation buttons at the bottom are 'Previous', 'Next', 'Save & Close', and 'Cancel'.

20. Select the desired Feature Scope: **Site** or **Site Collection**.

Note

If you're creating a **Site** definition, both scope options are available. If you're creating a **Site Collection** definition, the Feature Scope options will not be visible.

21. Select a feature from the **Available Features** list, and then click the right-facing arrow in the center of the page to remove the feature from the Available Features

list and move it to the Features to Activate or Features to Deactivate box on the right.

- **Features to Activate** – If you click the **Lock** icon next to a feature, then users cannot opt out of the feature when provisioning a site.
- **Features to Deactivate** – If you click the **Lock** icon next to a feature, then users cannot opt out of deactivating the feature when provisioning a site.

Important!

The up/down arrows to the right of the **Features to Activate/Deactivate** boxes enable you to set the order of activated/deactivated features from top to bottom; with top being the first priority and bottom being the last.

Some features are dependent upon others to be activated first, so these arrows enable you to assign the proper order for a feature. Some Site features are dependent on Site Collection features, and will also need to be activated first. For example, the Site feature "SharePoint Server Publishing" depends on the Site Collection feature "SharePoint Server Publishing Infrastructure". Provisioning processes Site Collection features from top to bottom first, and then Site features from top to bottom.

Gimmal recommends that you lock your activated/deactivated features so that the end user can't change the order of the features and break a feature relationship.

Removing features that are dependencies for certain lists/libraries will cause the lists/libraries to be removed as well.

22. Click **Next**. The Add-ins page displays, enabling you to select add-ins to be registered when a site is provisioned. The list of available add-ins are those that are installed into the SharePoint app catalog, and any that have been installed from the SharePoint store.

Provisioning Definition > Create

Progress

- General Settings ✓
- Lists & Libraries ✓
- Views ✓
- List Defaults ✓
- Library Defaults ✓
- Content Type Defaults ✓
- Features ✓
- Add-ins**
- Pages
 - Web Parts
- Site Structure
- Custom Properties
- Custom Actions
- Administrative
- Roles & Ownership
- Decommissioning

Show advanced

Add-ins for Human Resources Storefront Hide step ⓘ

Select add-ins to add when a site is provisioned.

Available Add-ins

- Branding Manager**
from Gimmal, LLC
- Decommissioning**
from Gimmal, LLC
- Display Template Manager**
from Gimmal, LLC
- Document Center**
from Gimmal, LLC
- Drop Zone**
from Gimmal, LLC
- Enhanced Search**
from Gimmal, LLC
- Enhanced Template Manager**
from Gimmal, LLC

Add-ins to Add

Previous Next Save & Close Cancel

Note

During provisioning, add-ins are registered to be installed into that site. From the user's perspective, add-ins are not initially installed on a newly-provisioned site. Add-ins are not added until a user with proper credentials visits the newly provisioned site.

To expedite this process, you can install add-ins during the provisioning process (optionally) by setting up Secure Store credentials in the Governance Hub.

For information on setting up Secure Store credentials, see the [Secure Store Overview](#) in the [Content Governance Installation](#) section.

23. Select an add-in from the **Available Add-ins** list, and then click the right-facing arrow in the center of the page to move the feature to the **Add-ins to Add** box on the right.
24. Click **Next**. The Pages page displays, enabling you to add and configure page layouts in the Provisioning site definition.

Provisioning Definition › Create

Progress

General Settings ✓
Lists & Libraries ✓
Views ✓
List Defaults ✓
Library Defaults ✓
Content Type Defaults ✓
Features ✓
Add-ins ✓

Pages

Web Parts
Site Structure
Custom Properties
Custom Actions
Administrative
Roles & Ownership
Decommissioning

Show advanced

Pages for Human Resources Storefront Hide step ⓘ

Use this section to configure pages for the site. ⓘ

New-Page.aspx ✖ +

Page Type

Wiki Page Publishing Page

You must select a page layout.


Page Layouts

- Willow Welcome Page
- Willow Welcome Page With Summary Links
- Willow Welcome Page with WebPart Zones
- Willow Welcome Page with Horizontal WebPart Zones
- Willow Welcome Page with Location Switching and WebPart Zones
- Willow Portal Home with WebPart Zones

Page Properties

Previous Next Save & Close Cancel

25. To add a new page for a site, follow these steps:


- Click the **Add a New Page** icon (). The New Page form displays.
- Complete the New Page form by entering the following settings:
 - Page Type:** Select a Wiki Page or Publishing Page.

Note

For Wiki Page, the feature “Wiki Page Home Page” will be added to the definition. For Publishing Page, the feature “SharePoint Server Publishing” will be added to the definition.

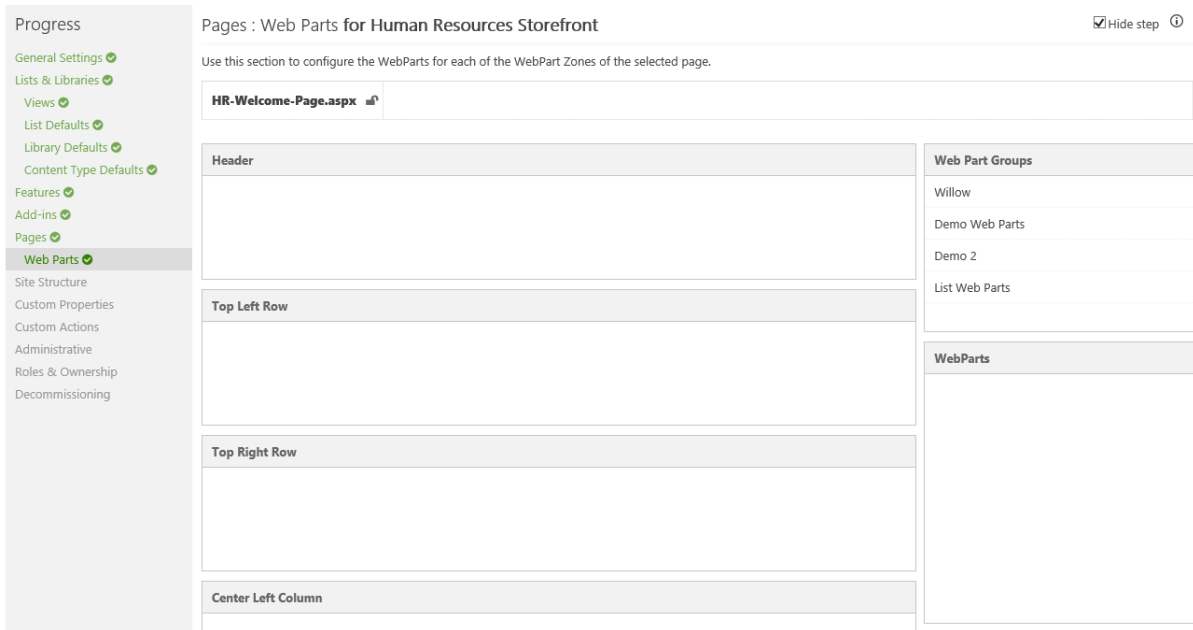
- Page Layouts:** Choose from the list of existing page layouts. The Page Properties box populates with available properties for the page layout you select.
- Page Properties:** Set the page layout properties. To access advanced page properties, click the **Show Advanced Page Layout Properties** checkbox.

Note

To create additional pages, scroll to the top of the page and click the **Add a New Page** icon (). Each new page will display across the top of the page. Click the Lock icon to make a page mandatory, and click the **X** icon to remove a page.

26. Click **Next**. The WebParts page displays. If you selected a page layout with configurable WebPart zones in the previous step, you can configure them on the WebParts page by following these steps:

Provisioning Definition > Create



Progress

Pages : Web Parts for Human Resources Storefront Hide step ⓘ

Use this section to configure the WebParts for each of the WebPart Zones of the selected page.

HR-Welcome-Page.aspx

Header

Web Part Groups

- Willow
- Demo Web Parts
- Demo 2
- List Web Parts

WebParts

Top Left Row

Top Right Row

Center Left Column

General Settings ✓

Lists & Libraries ✓

Views ✓

List Defaults ✓

Library Defaults ✓

Content Type Defaults ✓

Features ✓

Add-ins ✓

Pages ✓

Web Parts ✓

Site Structure

Custom Properties

Custom Actions

Administrative

Roles & Ownership

Decommissioning

- Select a group from the Web Part Groups box on the right side of the page. The WebParts box below it will populate with available WebParts for that group.
- Drag and drop the available WebParts into the desired WebPart Zones on the left side of the page.

27. Click **Next**. The Site Structure page displays, enabling you to define the structure of subsites within the existing site definitions.

Provisioning Definition › Create

The screenshot shows the 'Site Structure for Human Resources Storefront' configuration page. On the left is a navigation pane with a 'Progress' section and a 'Site Structure' section. The 'Site Structure' section is expanded, showing options like 'Custom Properties', 'Custom Actions', 'Administrative', 'Roles & Ownership', and 'Decommissioning'. The main area is titled 'Site Structure for Human Resources Storefront' and contains a diagram of the site structure. A box labeled 'HUMAN RESOURCES STOREFRONT' is connected to a larger box below it. A text box below the diagram says 'Drag a definition next to this block to add a site to the structure.' On the right, there is a list of site definitions to be dragged, including 'Willow Portal - Media Gallery', 'Willow Portal - News', 'Willow Portal - Site Directory', 'Willow Storefront (Sub Web)', 'Willow Portal - News - Copy', 'Demo 1', 'Demo 2', 'Jeff Test Webparts', 'Empty Site with Apps', and 'Empty Subsite'. At the bottom, there are buttons for 'Previous', 'Next', 'Save & Close', and 'Cancel'. A 'Show advanced' checkbox is also present.

28. Define your site structure by following these steps:

- a. Drag and drop the desired definition(s) listed on the right side of the page into the site structure in the center of the page.

Note

Once definitions are added to the structure, you can modify the site title and site URL. If existing definitions include their own site structure, that structure is added to the Site Structure Page automatically. These sub-nodes are read-only.

When adding a definition to the site structure, a circular dependency check is done. A list is compiled of every definition that will be brought in dynamically as part of the added definition. If any definition in that list matches the root node in your structure, a warning will be displayed that the dragged node would cause a circular reference, and it will not be allowed.

- b. If desired, modify the site title/site URL by clicking inside the appropriate text box and entering a new title/URL.

29. Click **Next**. The Custom Properties page displays, enabling you to define key and value pairs that will be set in the provisioned site's property bag.

Provisioning Definition › Create

Progress

- General Settings ✓
- Lists & Libraries ✓
- Views ✓
- List Defaults ✓
- Library Defaults ✓
- Content Type Defaults ✓
- Features ✓
- Add-ins ✓
- Pages ✓
- Web Parts ✓
- Site Structure ✓
- Custom Properties**
- Custom Actions
- Administrative
- Roles & Ownership
- Decommissioning

Show advanced

Custom Properties for Human Resources Storefront

Hide step ⓘ

Use this section to set property bag values.

key	value	+	-	↕
-----	-------	---	---	---

Previous Next Save & Close Cancel

30. Click **Next**. The Custom Actions page displays, enabling you to select Custom Actions that will be added to the Governance Hub Resource Gallery to be provisioned to this site. For more information, see Governance Hub Resource Gallery section.

Custom Actions for Human Resources Storefront Hide step ⓘ

Select custom actions to be added to this site.

Custom Action Scope Site Collection Site

Available Custom Actions

- List Custom Action
- Google Link Site

Selected Custom Actions

31. Click **Next**. The Administrative page displays, enabling you to hide the links that display on the Site Settings menu.

Provisioning Definition › Create

Administrative for Human Resources Storefront Hide step ⓘ

Select Site Settings Links to hide by moving them to the Removed Site Settings Links box.

Progress

- General Settings ✓
- Lists & Libraries ✓
- Views ✓
- List Defaults ✓
- Library Defaults ✓
- Content Type Defaults ✓
- Features ✓
- Add-ins ✓
- Pages ✓
- Web Parts ✓
- Site Structure ✓
- Custom Properties ✓
- Custom Actions ✓
- Administrative ✓**
- Roles & Ownership
- Decommissioning

Show advanced

Site Settings Links

- App Management
- Register an App
- Community Administration
- Manage Discussions
- Manage Categories
- Manage Members
- Community Settings
- Reputation Settings
- Hold
- Discover and hold content
- Holds

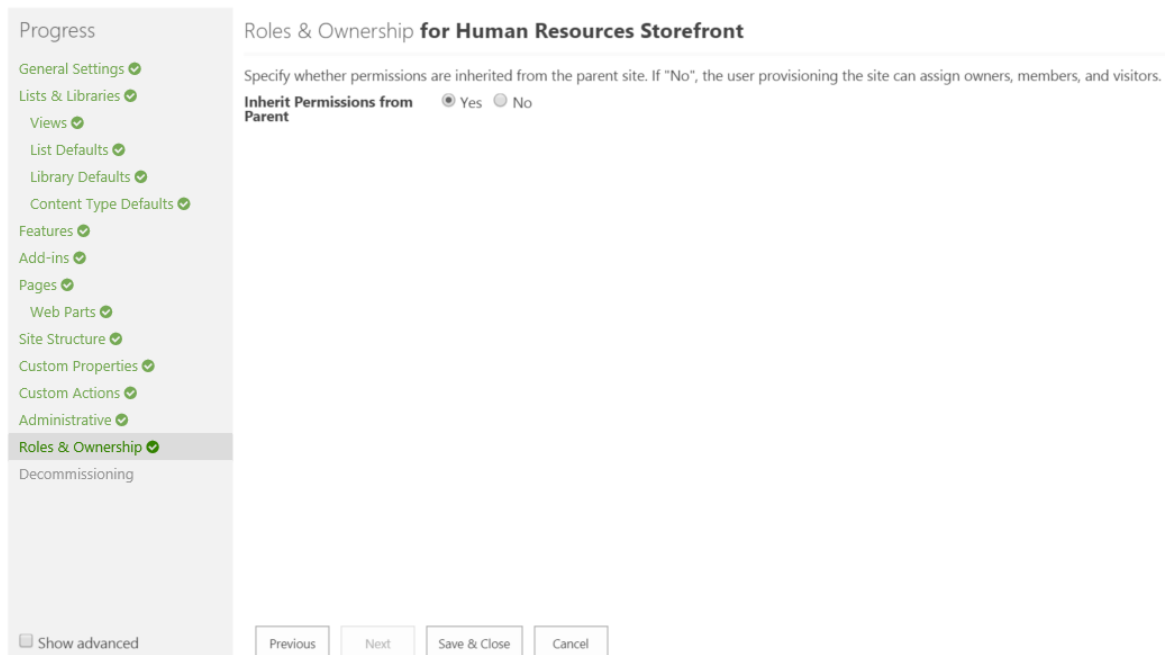
Removed Site Settings Links

32. Click the link you want to remove from the **Site Settings Links** list, and then click the right-facing arrow in the center of the page to move the link to the **Removed Site Settings Links** box.

Note

Any links listed in the **Removed Site Settings Links** box will not be visible on the Site Settings menu; however, the links can still be accessed via hidden URLs if a site owner has permission to access that feature. Hiding Site Settings links here is not intended to replace Site Security settings.

33. Click **Next**. The Roles & Ownership page displays.



The screenshot shows the 'Roles & Ownership' configuration page for 'Human Resources Storefront'. On the left is a 'Progress' sidebar with a list of settings: General Settings, Lists & Libraries, Views, List Defaults, Library Defaults, Content Type Defaults, Features, Add-ins, Pages, Web Parts, Site Structure, Custom Properties, Custom Actions, Administrative, Roles & Ownership (highlighted), and Decommissioning. A 'Show advanced' checkbox is at the bottom of the sidebar. The main content area is titled 'Roles & Ownership for Human Resources Storefront' and contains the instruction: 'Specify whether permissions are inherited from the parent site. If "No", the user provisioning the site can assign owners, members, and visitors.' Below this is the 'Inherit Permissions from Parent' section with radio buttons for 'Yes' (selected) and 'No'. At the bottom of the page are four buttons: 'Previous', 'Next', 'Save & Close', and 'Cancel'.

When creating a site definition, you're prompted to specify whether or not you want to inherit permissions from the parent site.

- If you select **Yes**, the **Hide step** checkbox in the upper right corner is disabled and checked-marked by default. When inheriting permissions, the Roles & Ownership page will not display for a request, as there are no options to change.
- If you select **No**, the user who provisions a site with this definition can assign Owners, Members, and Visitors.

34. Click **Next**. The Decommissioning page displays, enabling you to configure a Decommissioning definition for sites provisioned by this Provisioning definition.

Important!

The Decommissioning plug-in is only available when creating Provisioning definitions for a **site**. This plug-in is not available when creating Provisioning definitions for a **site collection**. If you want Decommissioning to be applied to a site collection definition, select a Site Definition where Decommissioning has been enabled on it.

Provisioning Definition › Edit

The screenshot shows the 'Decommissioning for Human Resources Storefront' configuration page. On the left is a 'Progress' sidebar with a list of settings: General Settings, Lists & Libraries, Views, List Defaults, Library Defaults, Content Type Defaults, Features, Add-ins, Pages, Web Parts, Site Structure, Custom Properties, Custom Actions, Administrative, Roles & Ownership, and Decommissioning (which is highlighted). Below the sidebar is a 'Show advanced' checkbox. The main content area has a title 'Decommissioning for Human Resources Storefront' and a 'Hide step' checkbox. Below the title is a description: 'Use this section to configure a Decommissioning definition for sites provisioned by this Provisioning definition.' The configuration includes: 'Enable Decommissioning' (checked), a 'Description' text box, 'Site Stewards' (a text box with a placeholder 'Enter names or email addresses...'), and 'Actions'. Under 'Actions', there are two rows. The first row has 'Quarantine site' (checked) with a date box containing '26 January, 2017', and 'Do not transfer content' (checked). The second row has 'Delete site' (unchecked) with a date box containing 'Select a date...', and 'Do not transfer content' (unchecked). At the bottom are buttons for 'Previous', 'Next', 'Save & Close', and 'Cancel'.

35. To configure a Decommissioning definition, follow these steps:

- a. Check **Enable Decommissioning** to enable the Decommissioning plug-in.

Note

If you use Decommissioning as a stand-alone product, when you create a definition, you must a title. When Decommissioning is used as part of the Provisioning interface, you will not need to enter a title, as it originates from the name of the site that is being provisioned.

- b. Enter a description of the Decommissioning definition.
- c. Enter the name or email address of a Site Steward. The Site Steward is a SharePoint user who reviews Decommissioning definitions, and approves site decommissioning events.
- d. Select a Decommissioning action:
 - **Quarantine Site** - All user access is removed, except that of the site collection administrator.
 - **Delete Site** - The site and all artifacts are removed and the site is permanently deleted.
- e. Select a date for the chosen action(s).
- f. Check **Do not transfer content** to specify that no content will be transferred when either of the above actions take place.

Note

Click the lock icon next to the right of the Site Steward and the Actions/Action Dates fields to prevent users who are provisioning a site or site collection from changing these fields.

36. Click **Save & Close**. Your definition is now saved. A Review Provisioning Definition page displays, enabling you to review all of the settings you entered in the Provisioning Definition wizard.

Note

If the **Save & Close** button is grayed out/disabled, a required field was left blank in the Definition Wizard. The wizard page that contains the blank field displays in red in the Progress section on the left side of the wizard. Go back to the page and enter the required information, and then click **Save & Close**.

SharePoint Newsfeed OneDrive Sites SharePoint ?

Provisioning Manager : Review Provisioning Definition

Update Sites OK

General Settings [Edit](#)

Definition Title HR Site Collection Template

Definition Description

Create a new content database for this site collection ⓘ

Language English

Site Type Site Collection

Template Team Site

Provisioned Site Address Allow Custom URL Assignment

Provisioning Workflow None

Lists & Libraries [Edit](#)

Selected Lists

- My Docs
- My Docs 1
- Record Library

Lists & Libraries : Content Types

My Docs Dublin Core Columns ([Default](#))

My Docs 1 Dublin Core Columns ([Mandatory](#))

Basic Page ([Default](#)) ([Mandatory](#))

Record Library Basic Page ([Default](#))

37. Click **Edit** next to any section that you need to revise or click **OK** at the top or bottom of the page to close the wizard. You are taken back to the Provisioning Administration Dashboard, where the new Provisioning definition displays.