Requesting a Site

Important!

The Administrator responsible for creating your organization's Provisioning definitions can hide certain features from end-users who are requesting a site. This is to prevent changes from being made to some of the definition's settings. The Administrator can choose to hide the following wizard pages when creating a Provisioning definition: **Lists & Libraries, Views, List Defaults, Library Defaults, Content Type Defaults, Features, Add-ins, Administrative Pages, Web Parts, Site Structure, Custom Properties, Custom Actions, Roles & Ownership** (if Inherit Permissions from Parent is set to "Yes"), and **Decommissioning**.

By default, when you request a site, you will only see the **Choose Definition** and **General Settings** tabs on the Provisioning Definition Wizard.

Once Provisioning definitions are configured, you can provision a site by performing the following steps:
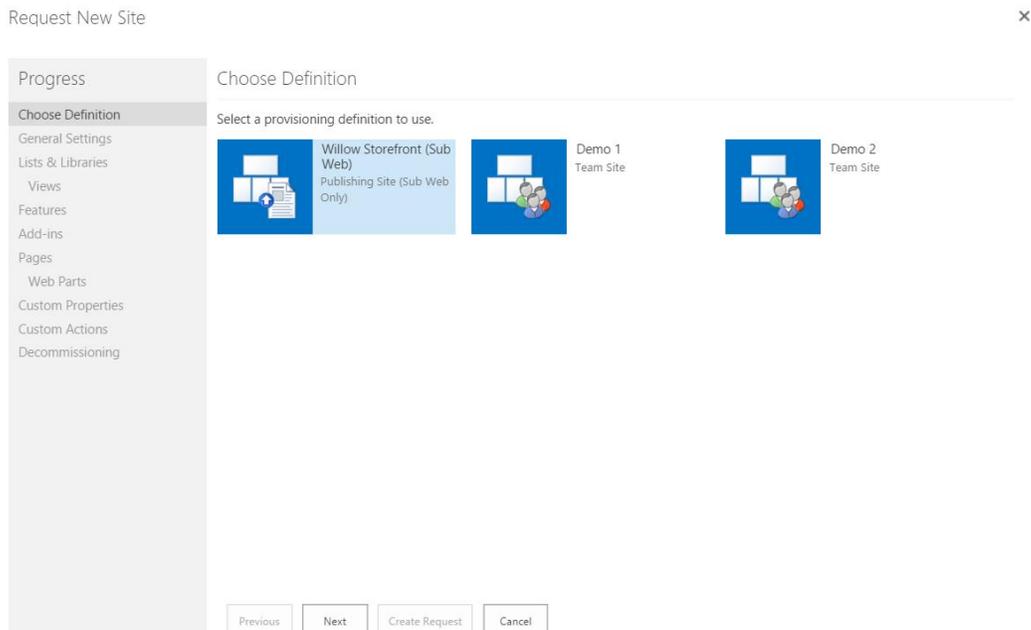
1. From the parent site that you want to provision a new site to, select **Settings** (⚙) > **Request New Site**.

Note

If the **Request New Site** menu option doesn't appear as expected, contact your SharePoint Administrator.
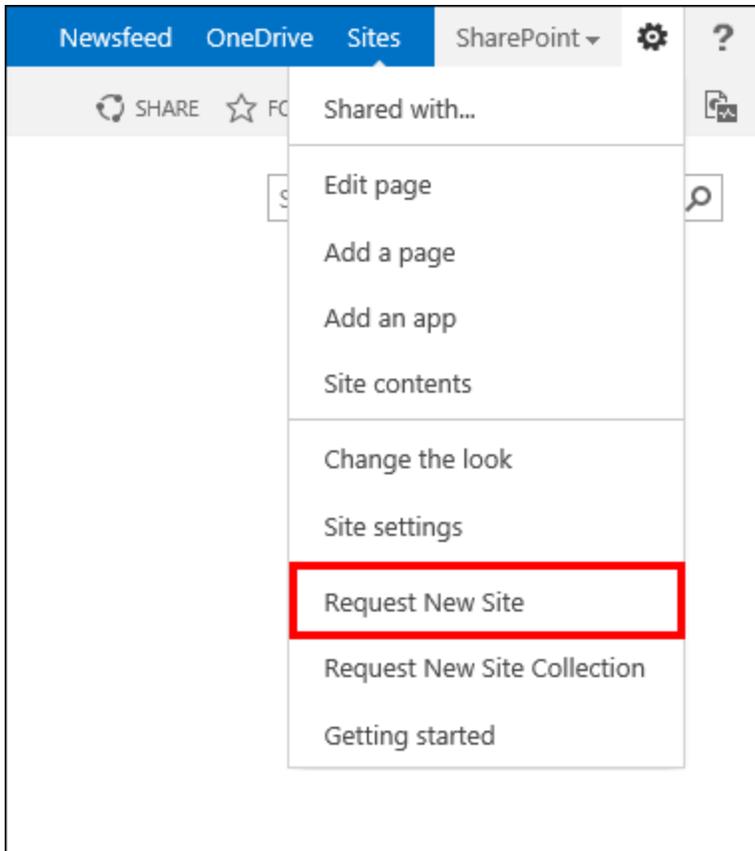
The Request New Site wizard opens on the **Choose Definition** page.

2. Select the definition you want to use in your Provisioning request, and then click **Next**. The **General Settings**page displays.
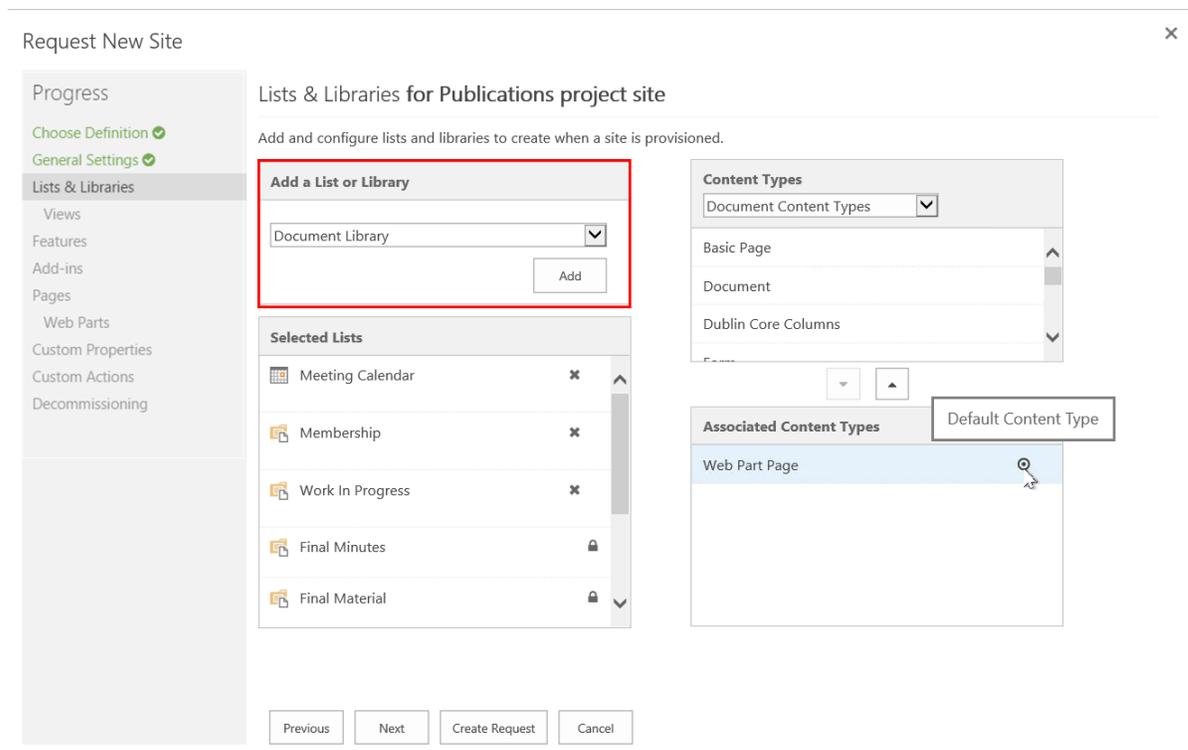
Note

To help determine the best definition to use for your site provisioning request, hover your mouse/pointer over each definition to see a description. The template type also displays under the definition's title, as shown in the preceding figure.

Additionally, you can check the definition's settings manually by clicking each of the Request New Site Wizard pages shown on the left side under **Progress**.

3. Enter a title for your site request (required).

4. Enter the remaining optional settings as desired:

- **Description**: Enter a description for the site.

- **Language**: Select the preferred site language from the Language dropdown list. The Provisioning system queries the language packs installed on your SharePoint system.

- **Site URL**: The Site URL can display in one of two formats:

  - In the Provisioning definition, on the General Settings page, if the Provisioned Site Address is set to **Force Standard URL**, the Site URL is automatically configured, as shown in the figure below.

  - If the Provisioned Site Address is set to **Allow Custom URL Assignment**, an additional empty text field displays below the Site URL field so that you can enter your own custom URL.

5. Click **Next**. The Lists & Libraries page displays. The lists and libraries included in the Provisioning definition you're using are located on the left.

6. To add additional lists or libraries to the new site, click the **Add a List or Library** drop-down, select an item, and click **Add**.

Note

You can change the list or library title by selecting it in the **Selected Lists** box and entering a new name. The application does not confirm the new name; it will accept any name that you enter in the field, but it must not be a duplicate title.

7. To associate a content type with a 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.

Note

Any content types that were assigned as "Mandatory" in the original Provisioning definition cannot be edited. If the content type is listed as a default AND it is mandatory, you cannot remove it or select another content type to serve as the default. If the content type is listed as a default but is not mandatory, it can be removed. The top content type in the list will then become the default content type.

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.

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.
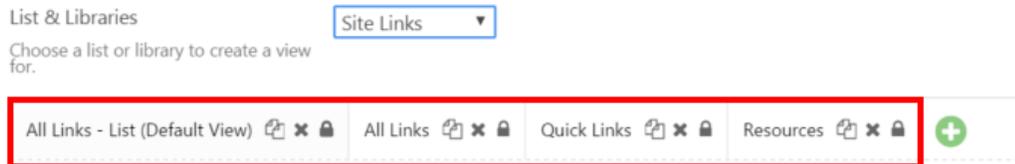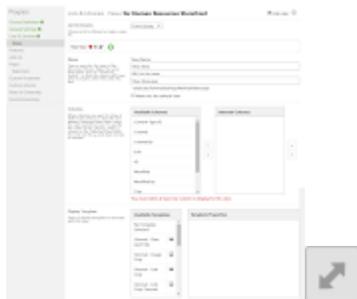

    b. Select the name of the view you want to display.

    c. If desired, edit the view settings and then continue with step **13**.

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, and any associated settings that display on the right side of the available display templates list.

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 displays 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 Features page displays, enabling you to define which features are activated and deactivated when a site is provisioned.

Request New Site

Progress

Choose Definition ✓
General Settings ✓
Lists & Libraries ✓
  Views ✓
Features
Add-ins
Pages
  Web Parts
Custom Properties
Custom Actions
Decommissioning

Features **for Publications project site**

Select site features to activate or deactivate when a site is provisioned.

Available Features	Features to Activate
▭ **Access App**	SharePoint Server Publishing 🔒
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**	Features to Deactivate
Adds required content types to the SharePoint Class web.	
▭ **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.	

Previous   Next   Create Request   Cancel

13. 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 a feature has a **Lock** icon next to it, then you cannot opt out of the feature when provisioning a site.

- **Features to Deactivate** – If a feature has a **Lock** icon next to it, then you cannot activate the feature when provisioning a site.

Note

The Administrator who configures Provisioning definitions can 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 the order must be determined by the Administrator or you must add these features in the proper order.

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. If the Administrator has not determined the order for these features to be added, you must add them in the appropriate order.
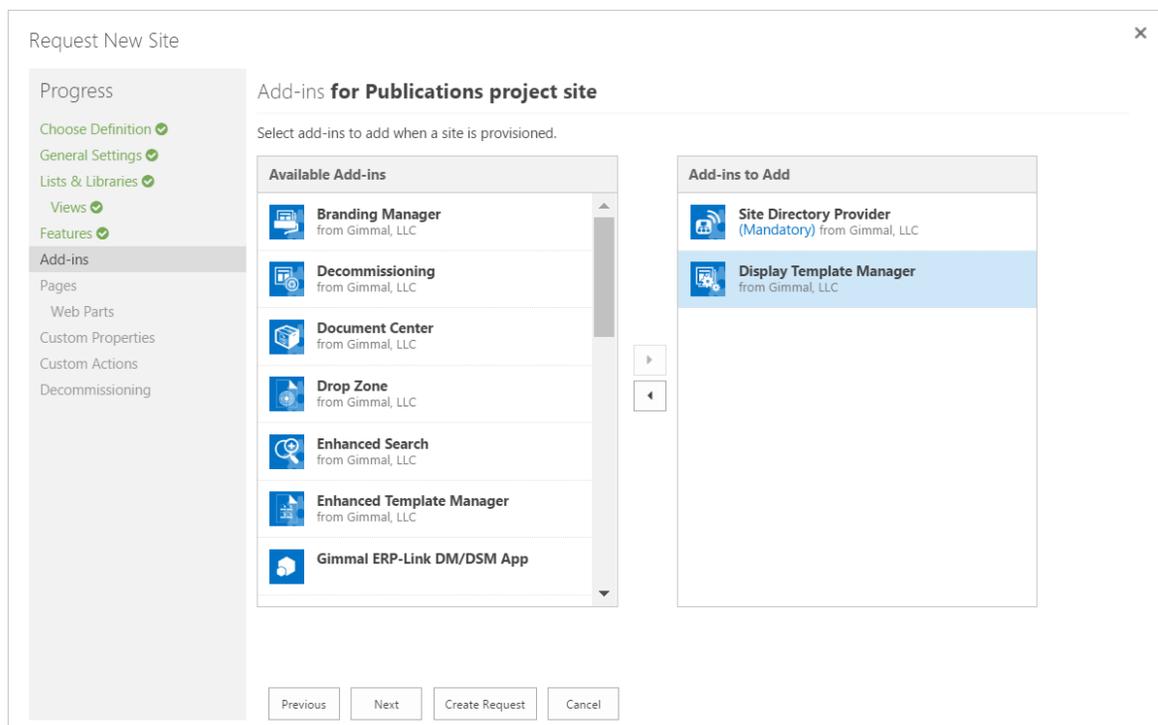
14. Click **Next**. The Add-ins page displays, enabling you to select add-ins to be registered when a site is provisioned.

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 Creating a Governance Hub Secure Store Item (Optional) section in this Help.

15. 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.

16. Click **Next**. The Pages page displays, enabling you to add and configure page layouts for your site.

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

    a. Click the **Add a New Page** icon (). The New Page form displays.

    b. Complete the New Page form by entering the following settings:

        i. **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.

ii.   **Page Layouts**: Choose from the list of existing page layouts. The Page Properties box populates with available properties for the page layout you select.

iii. **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 displays across the top of the page. Click the lock icon (🔓) to make a page mandatory, and click the **X** icon to remove a page.

18. 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 performing the following steps.

a.   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.

b. Drag and drop the available WebParts into the desired WebPart Zones on the left side of the page.

19. 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.
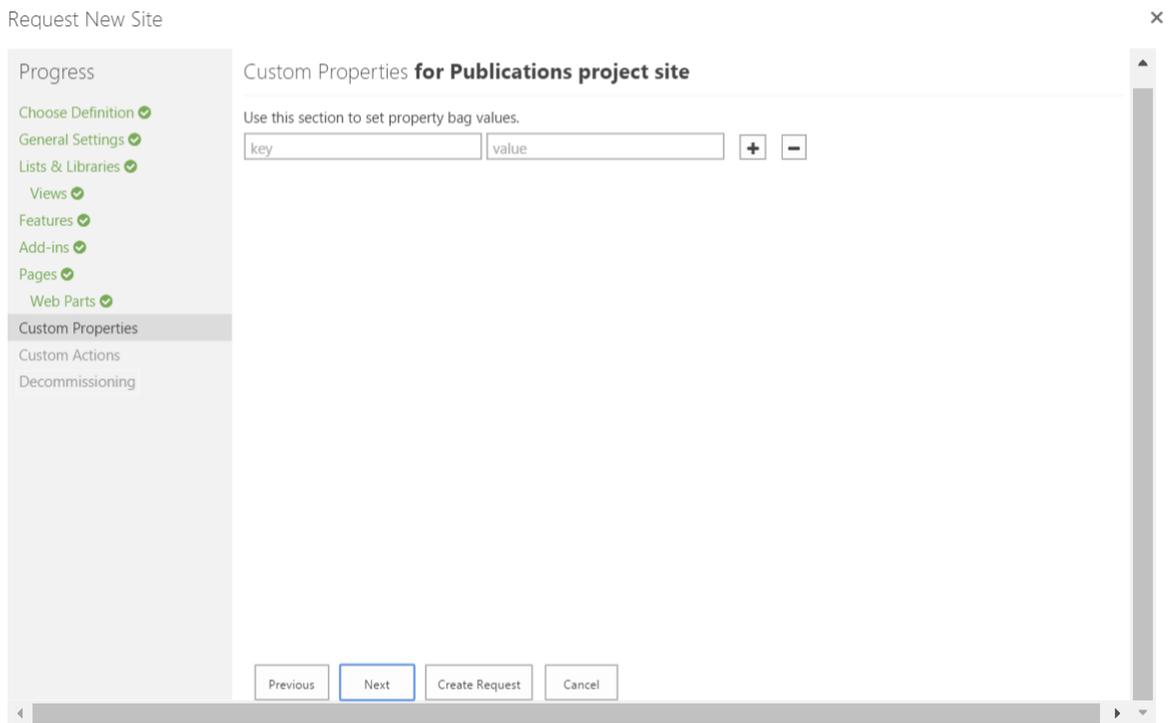
20. Click **Next**. The Custom Actions page displays, enabling you to select Custom Actions that will be added to the Governance Hub Resource Gallery to be provisioned to this site. For more information, see Appendix C: Governance Hub Resource Gallery.

21. If the Administrator set up the site definition so that Permissions can be specified, the Roles & Ownership option displays on the left side. Click **Next**.

Note

If the site definition you selected is set up to inherit permissions from the parent, the Roles & Ownership page does not display in the Request New Site Wizard. Proceed with Step **23** below.

Request New Site

Progress

Choose Definition ✓
General Settings ✓
Lists & Libraries ✓
  Views ✓
Features ✓
Add-ins ✓
Pages ✓
  Web Parts ✓
Custom Properties ✓
Custom Actions ✓
Roles & Ownership
Decommissioning

Roles & Ownership **for Publications project site**

Add users as **Owners** with full permissions, **Members** with contribute permissions, and **Visitors** with read-only permissions.

Permissions
Owners
Enter names or email addresses...
Members
Enter names or email addresses...
Visitors
Enter names or email addresses...

Previous   Next   Create Request   Cancel

22. Enter the names or email addresses of the individuals you want to assign permissions to for any sites that are provisioned using this Provisioning definition. Permissions are as follows:

- **Owners** have full permissions

- **Members** have contribute permissions

- **Visitors** have read-only permissions

23. Click **Next**. If the Provisioning administrator has permitted it, the Decommissioning page displays, enabling you to edit the following fields for the associated Decommissioning definition (if permitted).

Request New Site

Progress

Choose Definition ✓
General Settings ✓
Lists & Libraries ✓
　Views ✓
Features ✓
Add-ins ✓
Pages ✓
　Web Parts ✓
Custom Properties ✓
Custom Actions ✓
Roles & Ownership ✓
Decommissioning

Decommissioning **for Publications project site**

Use this section to configure a Decommissioning definition for sites provisioned by this Provisioning definition.

Enable Decommissioning　☑

Description

Site Stewards　Test User1 x

Actions

☑ Quarantine site　26 January, 2017　☑ Do not transfer content

☐ Delete site　Select a date...　☐ Do not transfer content

Previous　Next　Create Request　Cancel

24. Perform the following steps:

   a. Enter a description of the Decommissioning definition.

   b. 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.

   c. 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.

   d. Select a date for the chosen action(s).

   e. Check **Do not transfer content** to specify that no content will be transferred when either of the above actions take place.

Note

If you cannot edit the Decommissioning fields, the SharePoint Administrator who configured the initial Provisioning definition chose to make these fields read-only.

25. Click **Create Request**. The wizard window closes, and the Provisioning engine begins processing your request.

Note

If the **Create Request** button is grayed out/disabled, a required field was left blank in the Request New Site 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 **Create Request**.

Note

Depending on how the Administrator set up the Provisioning definition, once you submit a request, you may be notified or you can verify the progress of your request submission in the following ways:

- The Administrator may have set up a workflow to notify you when the site has been provisioned.

- The Administrator may have given you access to the Provisioning Request list so that you can view the status of the request.

- The Administrator may opt to notify you as part of a manual process.