


# Requesting a Site Collection

## Important!

The Administrator responsible for creating your organization's Provisioning definitions can hide certain features from end-users who are requesting a site collection or 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**.

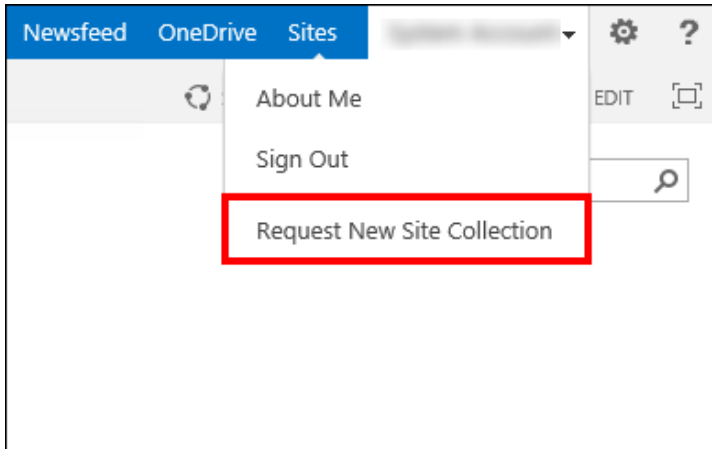
By default, when you request a site collection, you will only see the **Choose Definition, General Settings, and Roles & Ownership** tabs on the Provisioning Definition Wizard.

Once Provisioning definitions are configured, you can provision a site collection by performing the following steps:

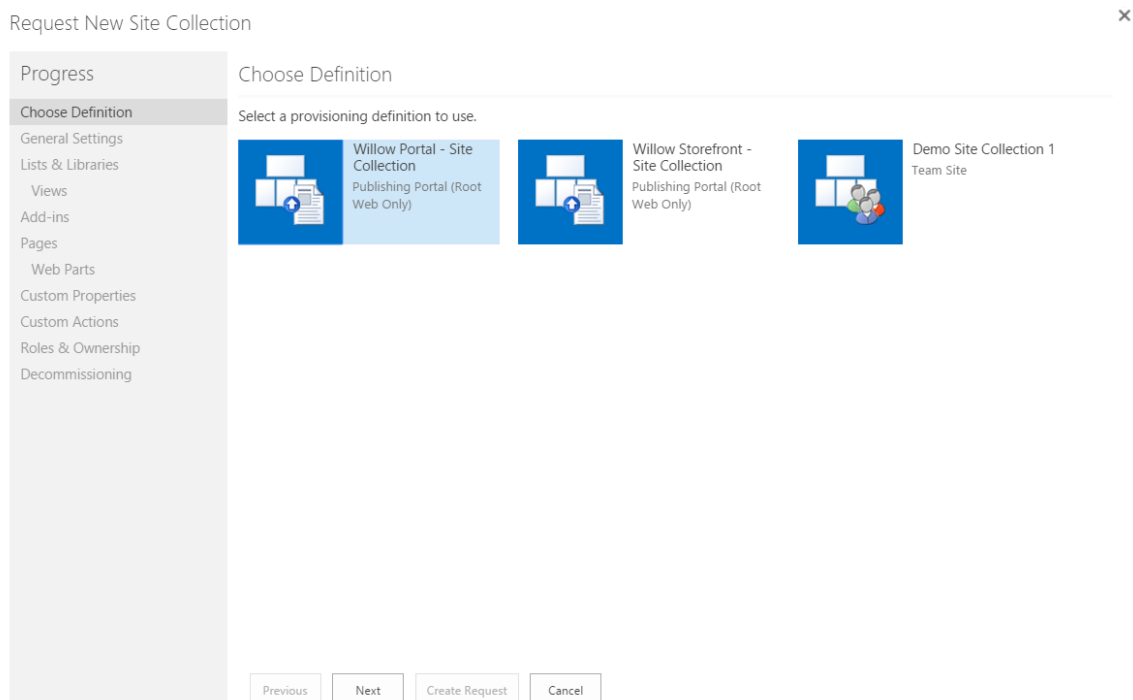
1. From the location that you want to provision a site collection to, click the drop-down arrow next to your login name, or click the **Settings** () icon, and select **Request New Site Collection**.

## Note

If the **Request New Site Collection** menu option doesn't appear as expected, contact your SharePoint Administrator.



The Request New Site Collection wizard opens on the Choose Definition page.



2. Select the definition you want to use in your provisioning request. The list of available definitions are those that were created by the Administrator.

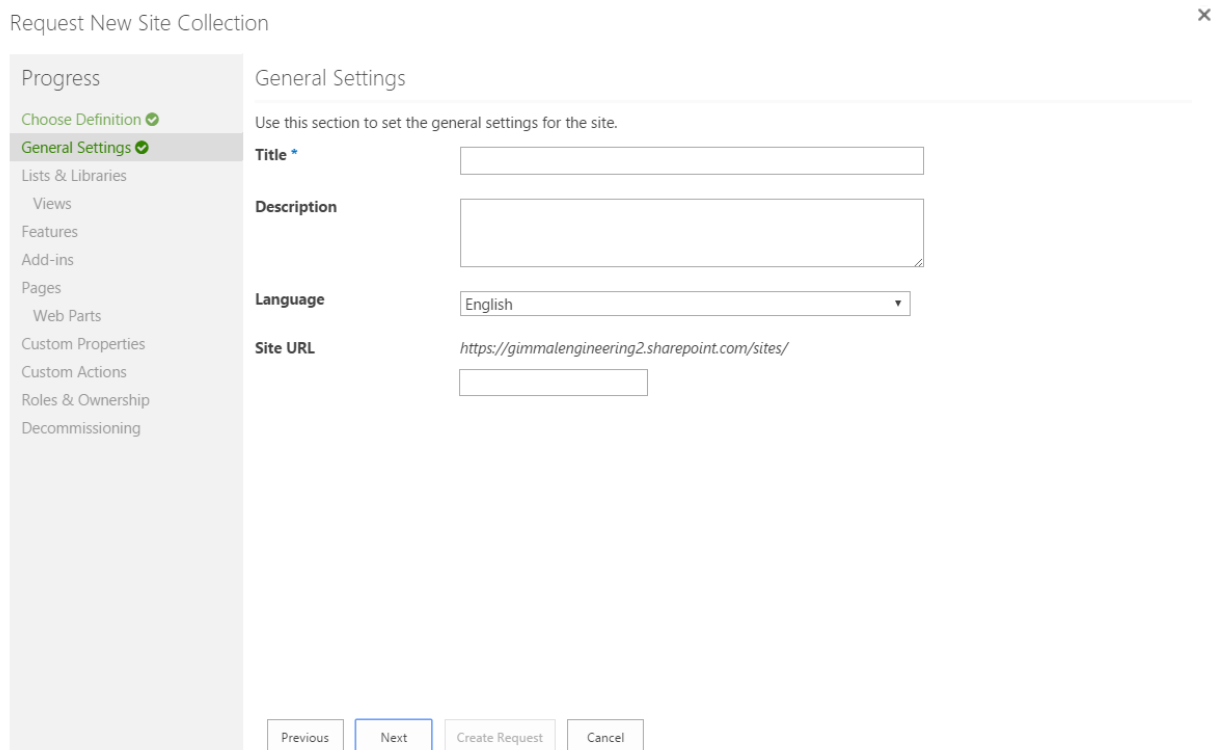
## Note

To help determine the best definition to use for your site collection, hover your mouse/pointer over each definition to see a description. The template type also displays under the definition's title.

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

Only definitions that are configured for the current web app will display in this window.

3. Click **Next**. The General Settings page displays.



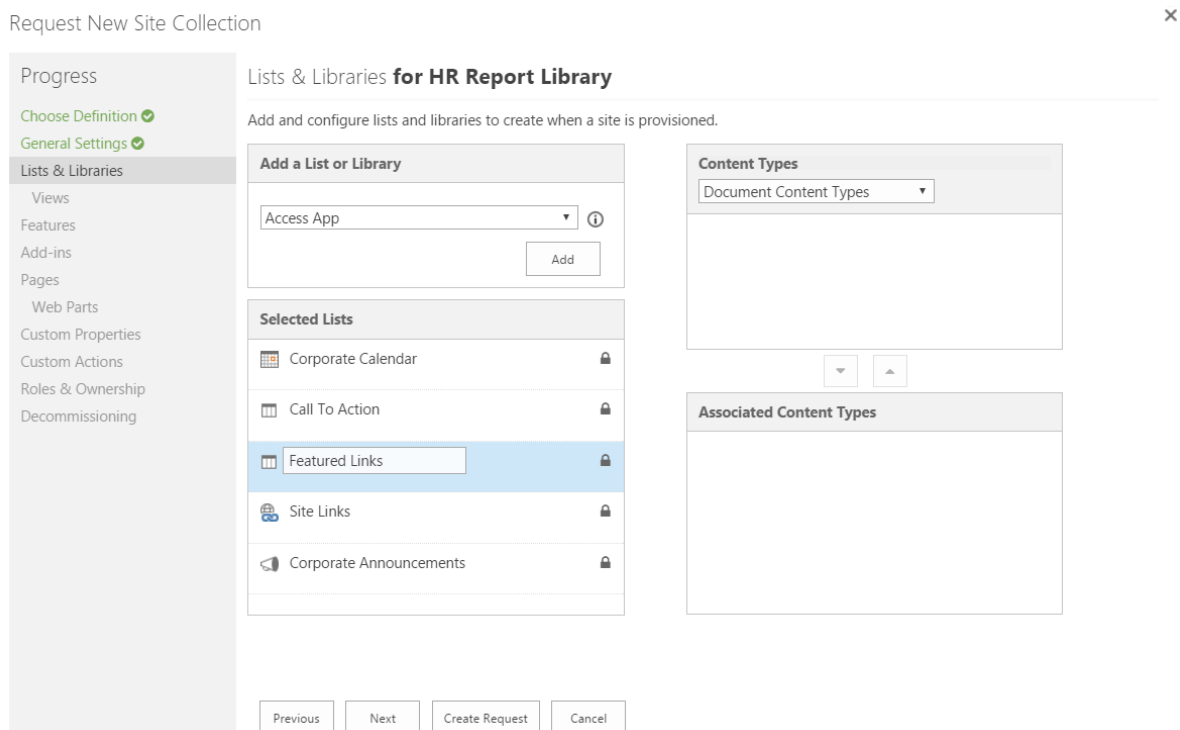
The screenshot shows the 'Request New Site Collection' wizard interface. On the left is a 'Progress' sidebar with a list of steps: 'Choose Definition' (checked), 'General Settings' (checked and highlighted), 'Lists & Libraries', 'Views', 'Features', 'Add-ins', 'Pages', 'Web Parts', 'Custom Properties', 'Custom Actions', 'Roles & Ownership', and 'Decommissioning'. The main area is titled 'General Settings' and contains the instruction: 'Use this section to set the general settings for the site.' Below this are four fields: 'Title' (text input), 'Description' (text area), 'Language' (dropdown menu with 'English' selected), and 'Site URL' (text input with the value 'https://gimmlengineering2.sharepoint.com/sites/'). At the bottom are four buttons: 'Previous', 'Next' (highlighted), 'Create Request', and 'Cancel'.

4. Enter a title for your site collection request (required)..

5. Enter the remaining optional settings as desired:

- **Description:** Enter a description for the site collection.
- **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 above.
  - 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.
6. Click **Next**. The Lists & Libraries page displays. The lists and libraries included in the Provisioning definition you're using are located on the left.



7. To add additional lists or libraries to the new site collection, 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.

8. 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.
9. Select the desired content type(s) from that group.
10. 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.

11. 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.

The screenshot shows the 'Request New Site Collection' wizard, specifically the 'Views' page for the 'HR Report Library'. The left sidebar contains a progress indicator with the following steps: 'Choose Definition' (checked), 'General Settings' (checked), 'Lists & Libraries' (checked), 'Views' (active), 'Features', 'Add-ins', 'Pages', 'Web Parts', 'Custom Properties', 'Custom Actions', 'Roles & Ownership', and 'Decommissioning'. The main content area is titled 'Lists & Libraries : Views for HR Report Library'. It features a dropdown menu labeled 'List & Libraries' with 'Wiki Page Library' selected. Below this is a text prompt: 'Choose a list or library to create a view for.' A large empty box with a green plus sign icon is provided for creating a new view. Below the box, a message states: 'There are no views associated with the list Wiki Page Library. Click on the '+' above to create one.' At the bottom of the wizard, there are four buttons: 'Previous', 'Next', 'Create Request', and 'Cancel'.













12. 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 **14**.

13. 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.

Progress

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

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

List & Libraries Form Library ▾

Choose a list or library to create a view for.

**New View** ✖ ✕ +

**Name**

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author," so that site visitors will know what to expect when they click this link.

View Name:

URL for this view:   
 ~site/Lists/Form%20Library/New%20View.aspx

Make this the default view

**Columns**

Move columns you want to show or hide in this view to or from the box labeled 'Selected View Fields' using the right and left arrows. To specify the order of the columns, select a column in the 'Selected View Fields' box and use the up and down arrows to reorder.

Available Columns	Selected Columns
Content Type ID	
Created	
Created By	
Edit	
ID	
Modified	
Modified By	
Title	

*You must select at least one column to display for this view.*

**Display Template**

Select a display template to associate with this view.

Available Templates	Template Properties
No Template Selected	
Gimmal - Date And Title	
Gimmal - Image Only	
Gimmal - Link Only	
Gimmal - Link Only Carousel	



- 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.

## Note

The **Display Template** setting displays only if Gimmel's Display Template Manager is installed.

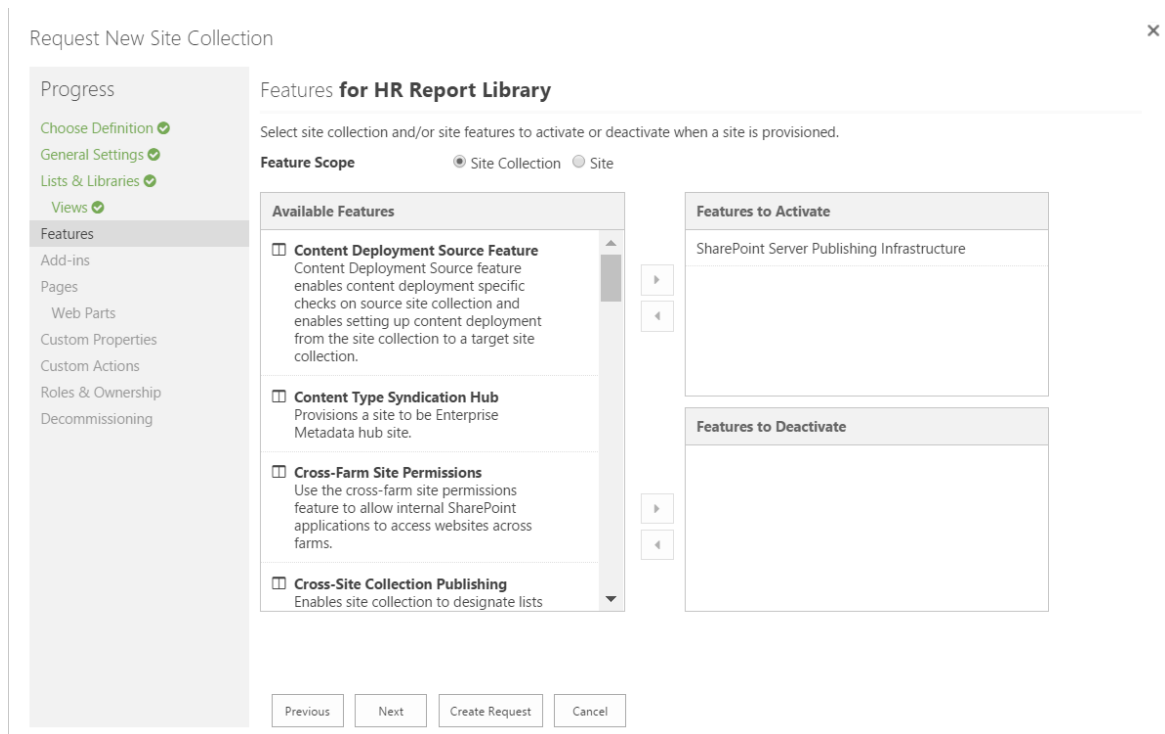
- iv. **Sort:** Select up to two columns to determine the order in which the items in the view will display.
- v. **Filter:** Select filter options to show all items in this view, or set parameters to filter the items that will display.
- vi. **Group By:** Group items based on up to two columns' values. 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.

14. Click **Next**. The Features page displays, enabling you to define which features are activated and deactivated when a site collection is provisioned.





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

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

## Note

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

17. Click **Next**. The Add-ins page displays, enabling you to select add-ins to be registered when a site collection 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 Configuring Governance Hub section in this Help.

The screenshot shows the 'Add-ins for HR Report Library' configuration page. On the left, a progress sidebar lists steps: Choose Definition, General Settings, Lists & Libraries, Views, Features, Add-ins (selected), Pages, Web Parts, Custom Properties, Custom Actions, Roles & Ownership, and Decommissioning. The main area is titled 'Add-ins for HR Report Library' and includes the instruction 'Select add-ins to add when a site is provisioned.' It features two panels: 'Available Add-ins' and 'Add-ins to Add'. The 'Available Add-ins' panel lists: Branding Manager, Decommissioning, Document Center, Drop Zone, Enhanced Search, Enhanced Template Manager, and Gimmel ERP-Link DM/DSM App. The 'Add-ins to Add' panel lists: Display Template Manager (Mandatory), Mega Menu (Mandatory), Mega Menu Source (Mandatory), News (Mandatory), Personal Sidebar (Mandatory), and Personal Sidebar JavaScript Apps (Mandatory). In the center, there are two arrows: a right-facing arrow pointing to the 'Add-ins to Add' panel and a left-facing arrow pointing to the 'Available Add-ins' panel. At the bottom, there are four buttons: 'Previous', 'Next' (highlighted with a blue border), 'Create Request', and 'Cancel'.

18. 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.
19. Click **Next**. The Pages page displays, enabling you to add and configure page layouts for your site.

Progress

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

### Pages for HR Report Library

Use this section to configure pages for the site. ⓘ

home.aspx (Default Page) corporatecalendar.aspx

Page Type	Page Properties
<input type="radio"/> Wiki Page <input checked="" type="radio"/> Publishing Page	Title <input type="text" value="{SiteTitle}"/>
<b>Page Layouts</b>	Name <input type="text" value="home.aspx"/>
<input type="radio"/> Willow Welcome Page	<input type="text" value="~/site/Pages/home.aspx"/>
<input type="radio"/> Willow Welcome Page With Summary Links	<input checked="" type="checkbox"/> Set as Default Page
<input type="radio"/> Willow Welcome Page with WebPart Zones	If page exists in the <b>Pages</b> Library: <input checked="" type="checkbox"/> Overwrite File <input checked="" type="checkbox"/> Set File Properties/Web Parts
<input type="radio"/> Willow Welcome Page with Horizontal WebPart Zones	<input type="checkbox"/> Show Advanced Page Layout Properties
<input type="radio"/> Willow Welcome Page with Location Switching and WebPart Zones	
<input checked="" type="radio"/> Willow Portal Home with WebPart Zones	

20. 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

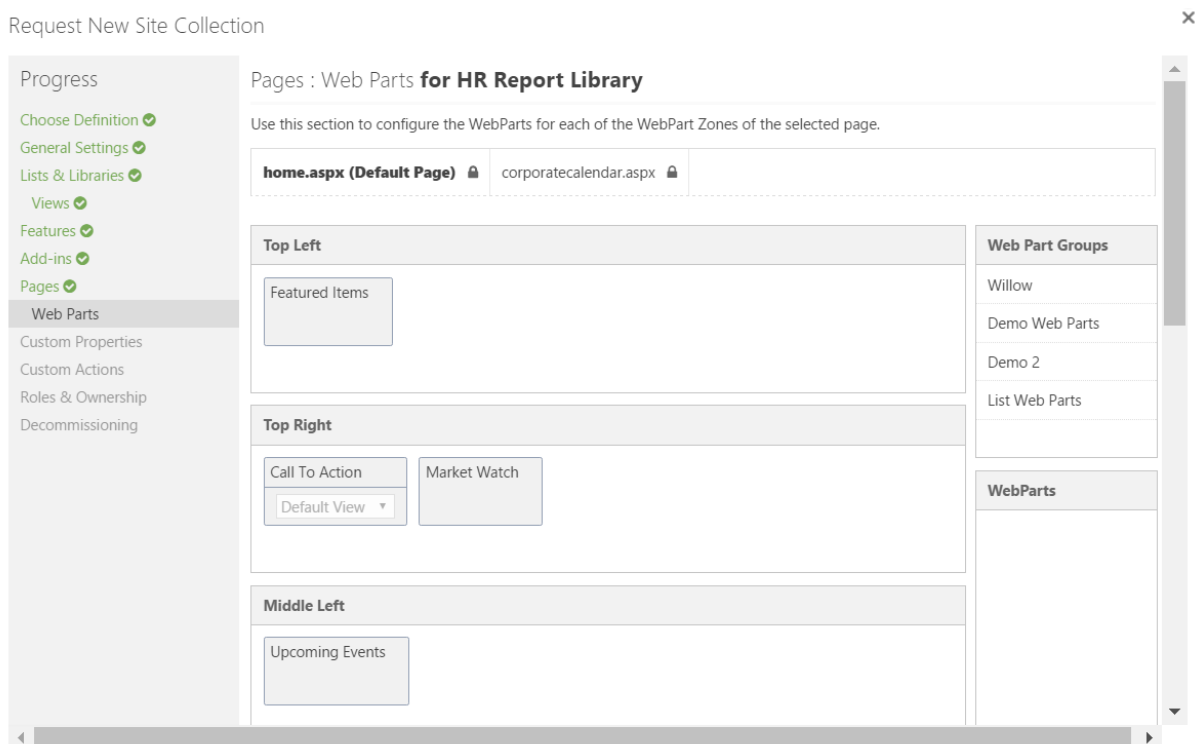
For Wiki Page, the feature “Wiki Page Home Page” will be added to the definition. For Publishing Page, the feature “SharePoint Server Publishing” will be added to the definition.

- 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.

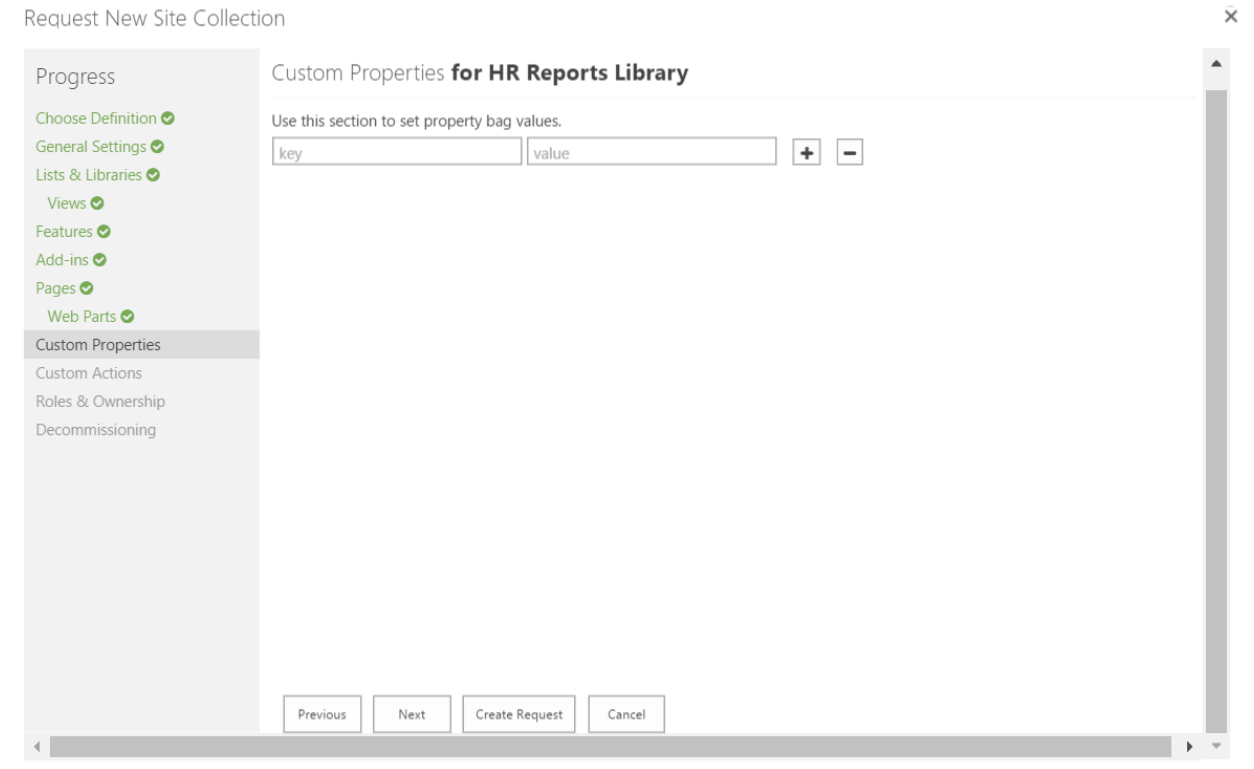
## Note

To create additional pages, scroll to the top of the page and click the **Add a New Page** icon (+). Each new page 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.

21. 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.



- a. Select a group from the Web Part Groups box on the right side of the page. The Web-Parts 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.
22. 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.



23. 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 [Working with the Governance Hub Resource Gallery](#) in the Governance Hub Help section.

The screenshot shows the 'Custom Actions for HR Reports Library' configuration page. On the left is a 'Progress' sidebar with steps: Choose Definition (checked), General Settings (checked), Lists & Libraries (checked), Views (checked), Features (checked), Add-ins (checked), Pages (checked), Web Parts (checked), Custom Properties (checked), Custom Actions (highlighted), Roles & Ownership, and Decommissioning. The main content area is titled 'Custom Actions for HR Reports Library' and includes the instruction 'Select custom actions to be added to this site.' Below this is a 'Custom Action Scope' section with radio buttons for 'Site Collection' (selected) and 'Site'. Two panels are visible: 'Available Custom Actions' containing 'Google Link Site Collection' and an empty 'Selected Custom Actions' panel. Navigation buttons at the bottom include 'Previous', 'Next' (highlighted), 'Create Request', and 'Cancel'.

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

The screenshot shows the 'Roles & Ownership for HR Reports Library' configuration page. The 'Progress' sidebar is updated, with 'Roles & Ownership' highlighted and 'Custom Actions' now checked. The main content area is titled 'Roles & Ownership for HR Reports Library' and includes the instruction 'Add users as **Owners** with full permissions, **Members** with contribute permissions, and **Visitors** with read-only permissions.' Below this is a 'Permissions' section with three input fields: 'Owners', 'Members', and 'Visitors', each with the placeholder text 'Enter names or email addresses...'. Navigation buttons at the bottom include 'Previous', 'Next' (highlighted), 'Create Request', and 'Cancel'.

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

- **Owners** have full permissions
- **Members** have contribute permissions
- **Visitors** have read-only permissions

26. 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.

- Enter a description of the Decommissioning definition.
- 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.
- 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.
- Select a date for the chosen action(s).
- 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.



Request New Site Collection ×

Progress

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

### Decommissioning for HR Report Library

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

**Enable Decommissioning**

**Description**

**Site Stewards**

**Actions**

Quarantine site   Do not transfer content

Delete site   Do not transfer content

Previous Next Create Request Cancel

27. 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 Collection 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 has 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