

Chapter 6 – Site settings

Terms

This Windows SharePoint Services Operations Guide (WSSOPS) from the Computer Information Agency is provided as is. Every effort has been made by the author to ensure that information provided is correct however this cannot be guaranteed.

By using the Guide you also acknowledge that any work performed on production systems is a potentially dangerous act and may involve significant business risk and downtime. You hereby agree to release, waive and discharge the Computer Information Agency and/or the author from any liability incurred to yourself, your business or customers for any and all loss or damage, and any claims or demands therefore on account of problems arising from the use of this Guide.

By using this guide you hereby assume full responsibility for any risk to computer systems, now and forever arising out of, or related to the use of this Guide on any computer system.

Distribution and Duplication Guidelines

This document is copyright and only available directly from the Computer Information Agency. This work is now licensed under Creative Commons.



<http://creativecommons.org/licenses/by-nc-sa/4.0/>

By using this Guide you agree to these terms.

Index

- 6.1 Scope**
- 6.2 Accessing**
- 6.3 People and Groups**
- 6.4 Advanced permissions**
- 6.5 Title, Description and Icon**
- 6.6 Tree view**
- 6.7 Site theme**
- 6.8 Top link bar**
- 6.9 Quick Launch**
- 6.10 Save site as a template**
- 6.11 Reset to site definition**
- 6.12 Master page gallery**
- 6.13 Site Content Types**
- 6.14 Site column gallery**
- 6.15 Site template gallery**
- 6.16 List Template Gallery**
- 6.17 Web Part Gallery**
- 6.18 Workflows**
- 6.19 Regional Settings**
- 6.20 Lists and Libraries**
- 6.21 Usage Report**

- 6.22 User Alerts**
- 6.23 RSS**
- 6.24 Search Visibility**
- 6.25 Sites and Workspaces**
- 6.26 Site features**
- 6.27 Delete this Site**
- 6.28 Site Collection recycle bin**
- 6.29 Site Collection features**
- 6.30 Site Hierarchy**
- 6.31 Portal Site Connection**
- 6.32 Sub-site settings**
- 6.33 Conclusion**

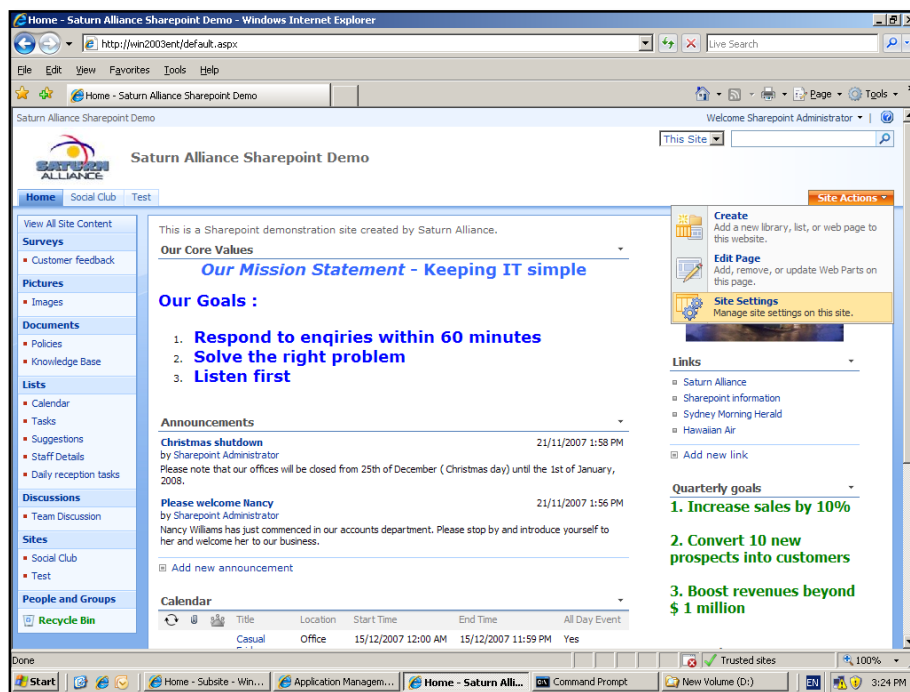
Chapter 6 – Site settings

6.1 Scope

The Site Settings option allows a Windows SharePoint Services v3 (WSS v3) administrator to customize many aspects of a WSS v3 site from within the browser. Each WSS v3 site has its own settings with the default site or top level having a number of additional options.

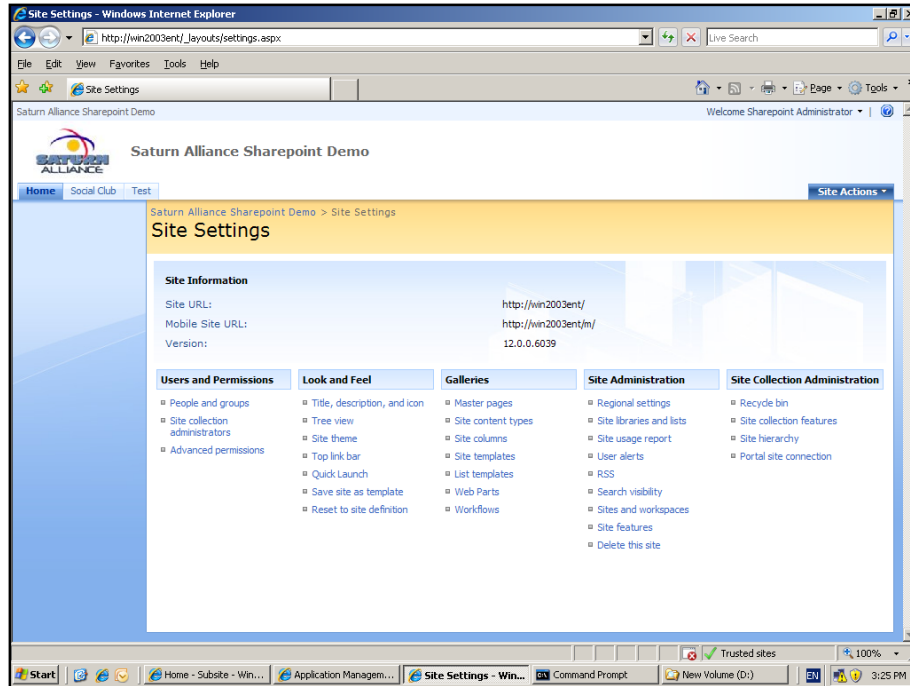
WSS v3 Site Settings are only available to site owners and administrators with the option not even being available to other users because of WSS v3 security trimming. This chapter will take you through all the options that are available here.

6.2 Accessing

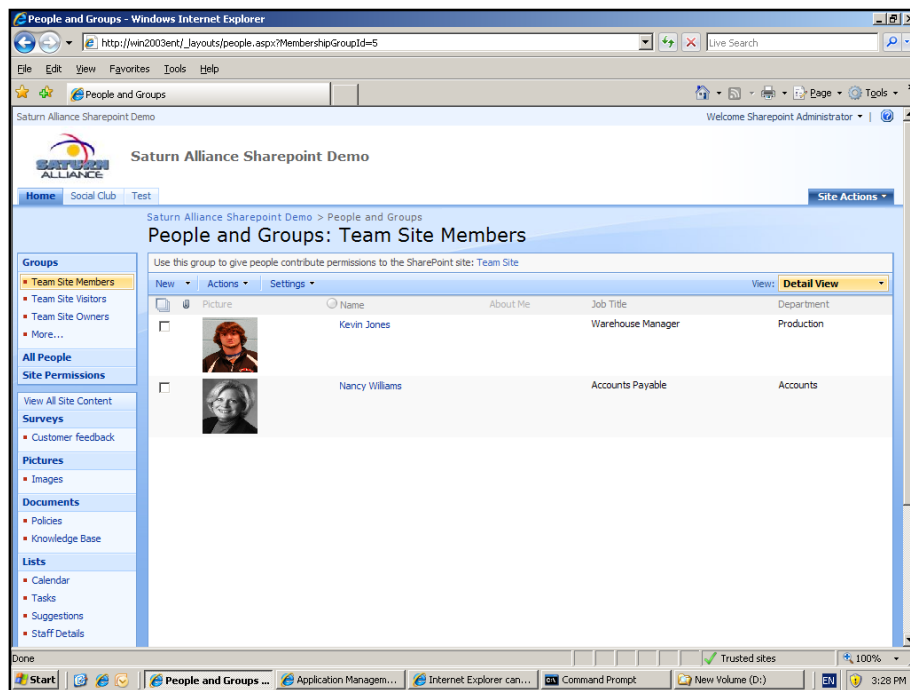


To access the site settings for any WSS v3 site you must firstly be logged in as a WSS v3 owner or administrator. In the top right hand side of the screen, under the search area, you will see *Site Actions*. Click this to display the drop down menu shown above. From this menu select **Site Settings**. Remember, that each WSS v3 site can have its own unique site settings but they are all accessed in the same way.

Chapter 6 – Site settings



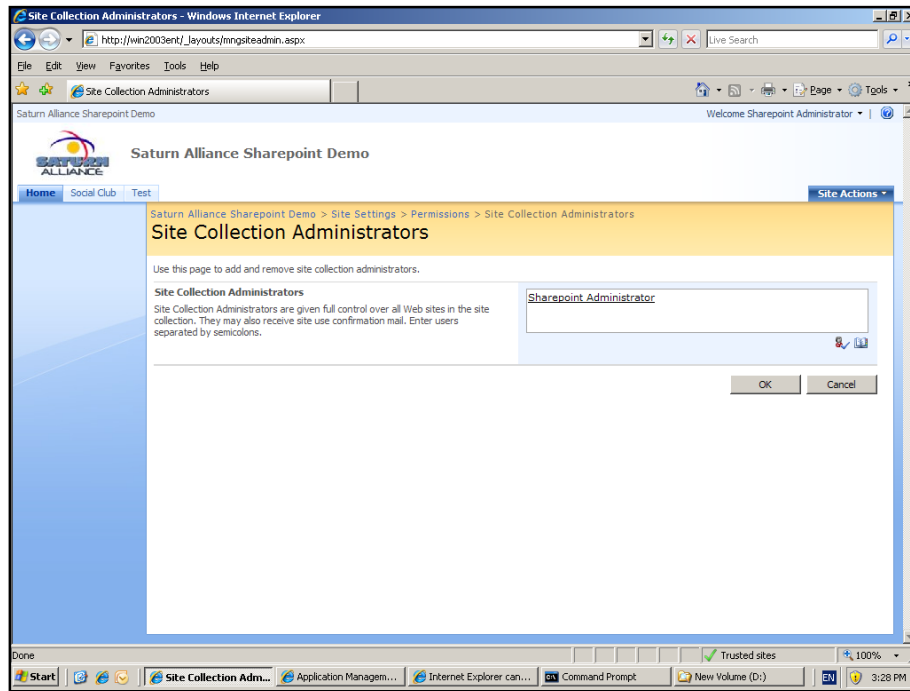
Simply select the option that you require from the list presented. The above example shows the site settings from a top level site, which is slightly different from sub-sites. You will see a number of headings including: *Users and Permissions*, *Look and Feel*, *Galleries*, *Site Administration*, and *Site Collection Administration*. Simply click on the desired link.



Chapter 6 – Site settings

6.3 People and Groups

The People and Groups option will take you to the list of WSS v3 users for the site. Here you can modify their permissions as well as add and delete users. For more information see **Chapter 15 – Security**.

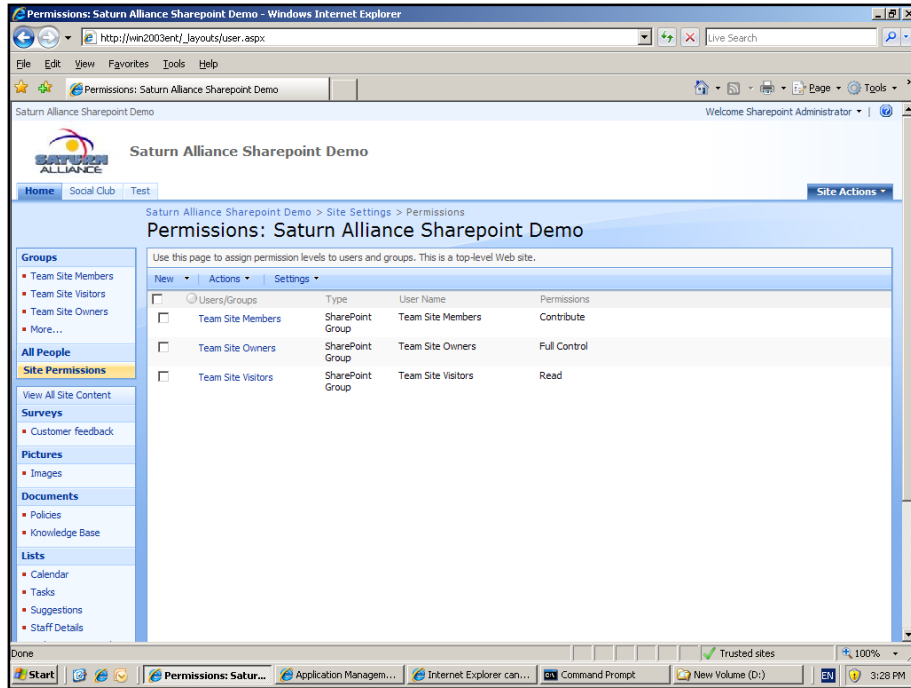


6.4 Site Collection Administrators

A site collection administrator has full rights over all the WSS v3 sites in a particular collection. Using this option you can set who has full control over all the web sites. A Site Collection Administrator does not necessarily have to be a network domain administrator. Simply type in the desired name or network login to the box or use the look up option to select users from your network.

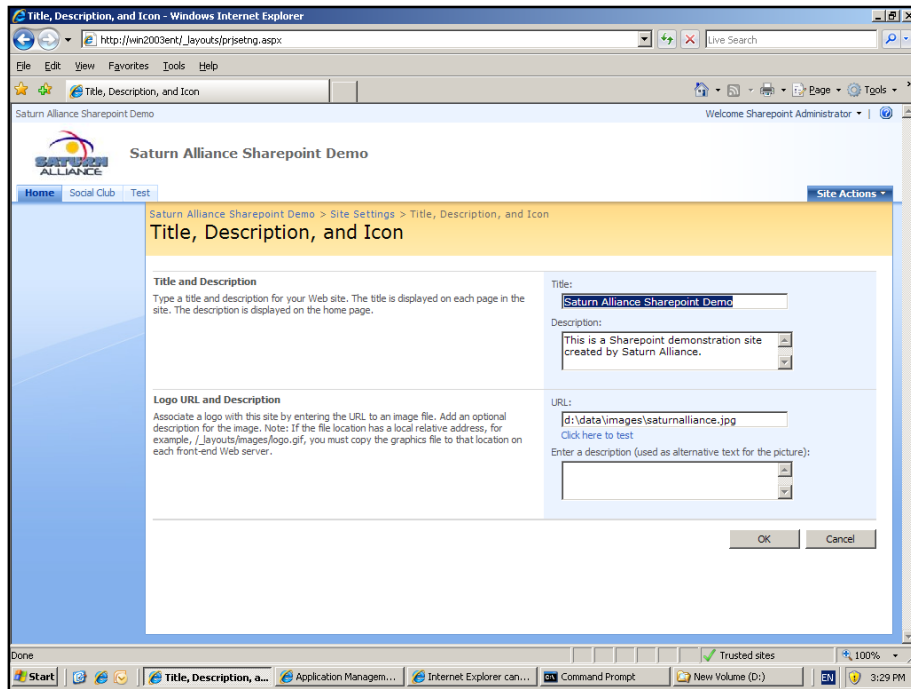
This option may be necessary after you have migrated your WSS v3 site from one security arena to another (i.e. from one domain to another). In that case, the old Site Collection Administrator may still be pointing to an old network user. Simply make the change here to allow access for the current domain.

Chapter 6 – Site settings



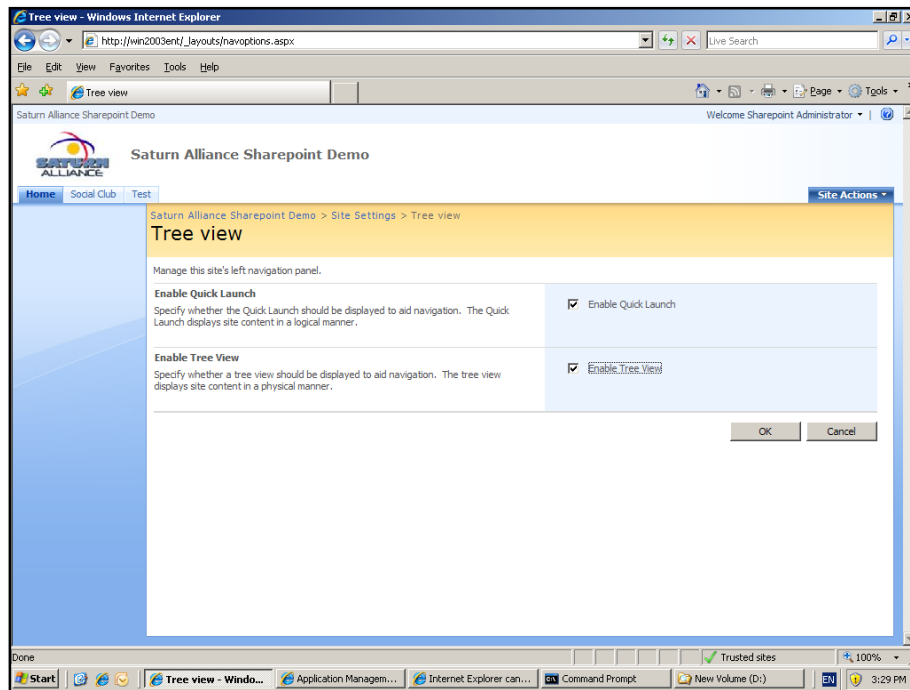
6.4 Advanced Permissions

This option is the same as selecting the *Site Permissions* options from the *Quick Launch Bar* on the left of the screen. Here you can define and modify the existing Permissions for WSS v3 groups. For more information about using this see – **Chapter 15 – Security**.



6.5 Title, Description and Icon

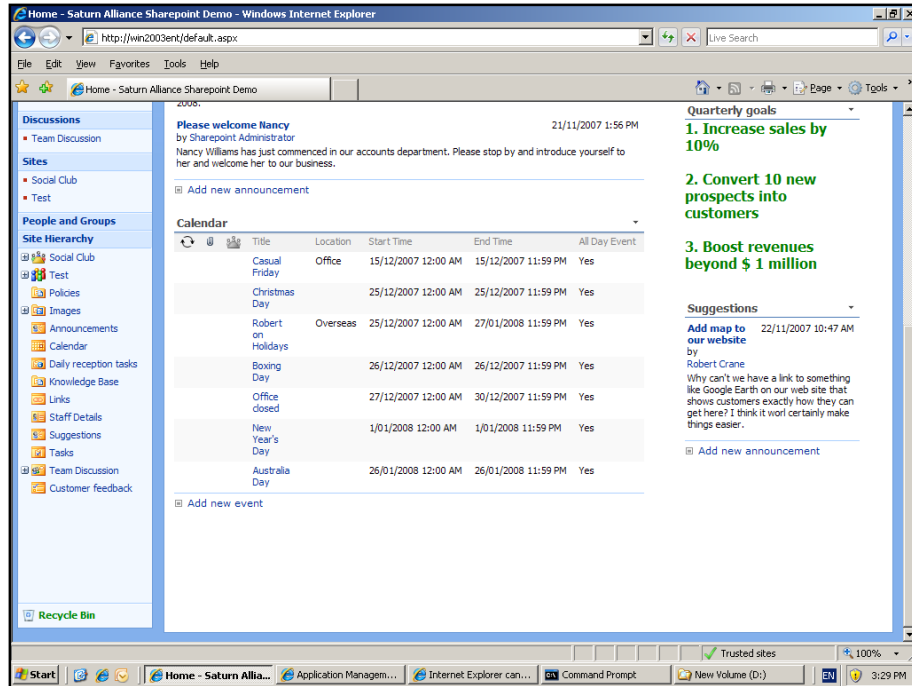
With this option you can change the *Title* and *Description* of the WSS v3 site which appears in the upper left of the site. You also have the option to change the WSS v3 logo that appears in the upper left of the site by default. You can either select an image that is locally stored on the WSS v3 site or is available on the Internet. Remember that for the image to display for all users it needs to be accessible by all users as well.



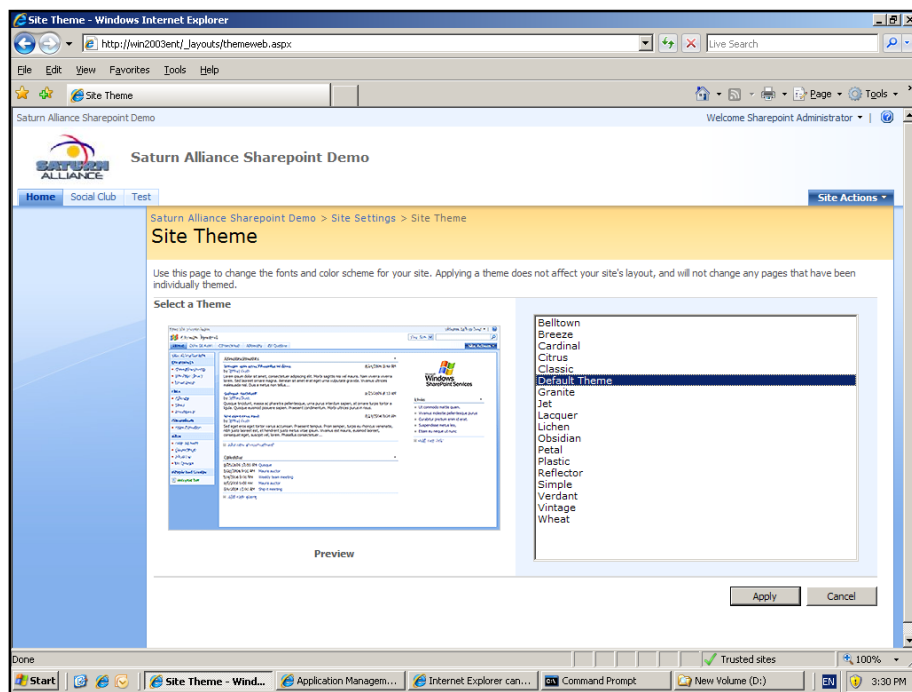
6.6 Tree View

By default, tree navigation of a WSS v3 site is turned off. You can enable it by selecting the *Enable Tree View* option. You will also see that this option allows you to turn off the *Quick Launch* menu that appears by default on the left hand side of WSS v3 sites.

Chapter 6 – Site settings

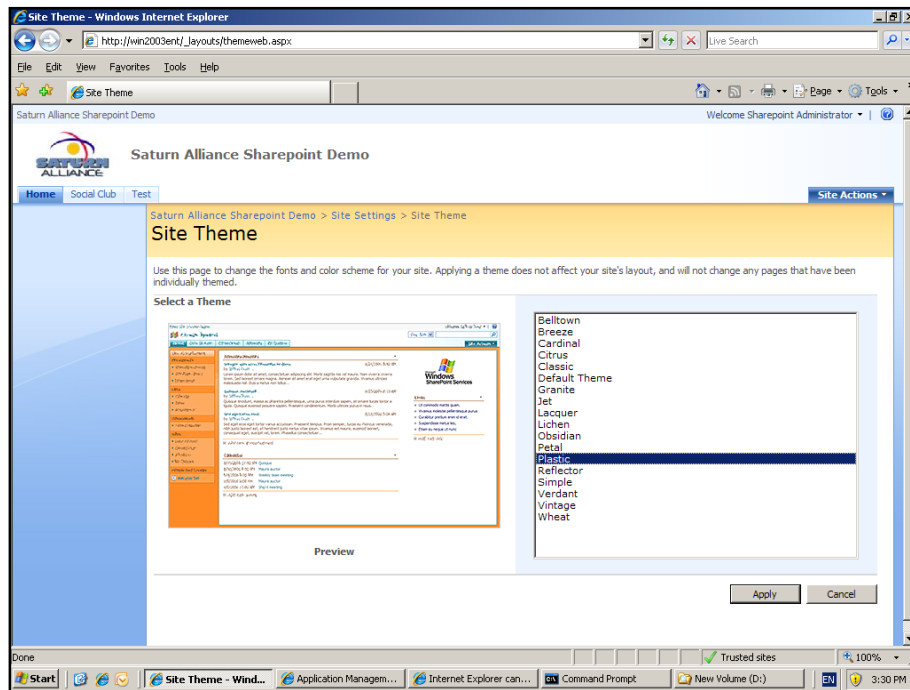


After selecting the option to enable the Tree View of the WSS v3 site and returning to the home page you will notice at the bottom of the *Quick Start menu* on the lower left of the window that a *Site Hierarchy* area appears. This displays the WSS v3 as a tree which allows you to see all the content of the WSS v3 site and how it is structured. You can also navigate the site via this tree display simply by clicking on the location you desire.

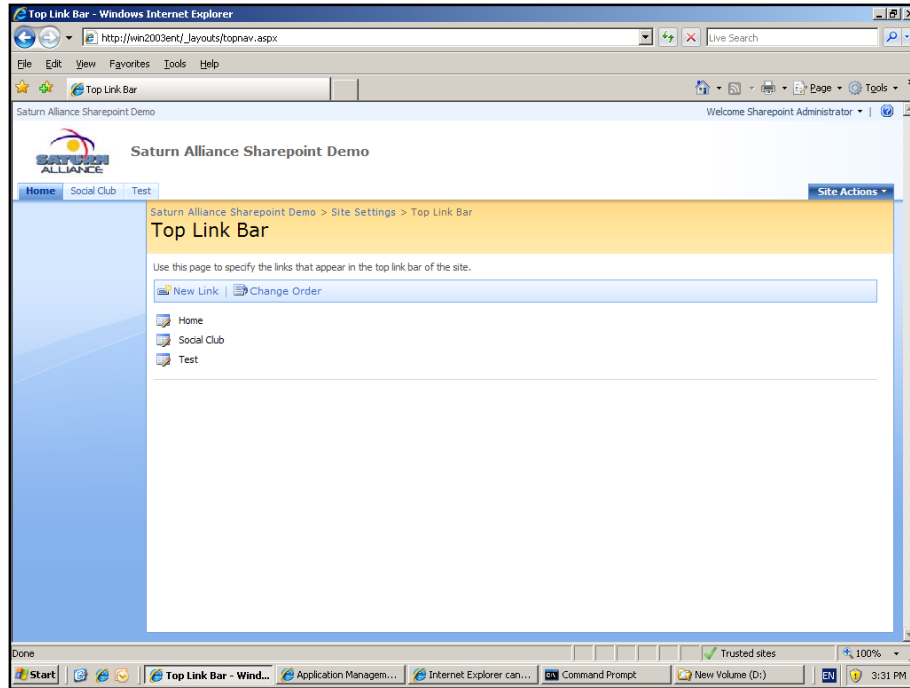


6.7 Site Theme

Using this option allows you to select from a number of different site themes. This is an extremely handy option when you have created a number sub-sites in WSS v3. It is a best practice recommendation to choose a different theme for each sub site so that it can easily be identified by users.



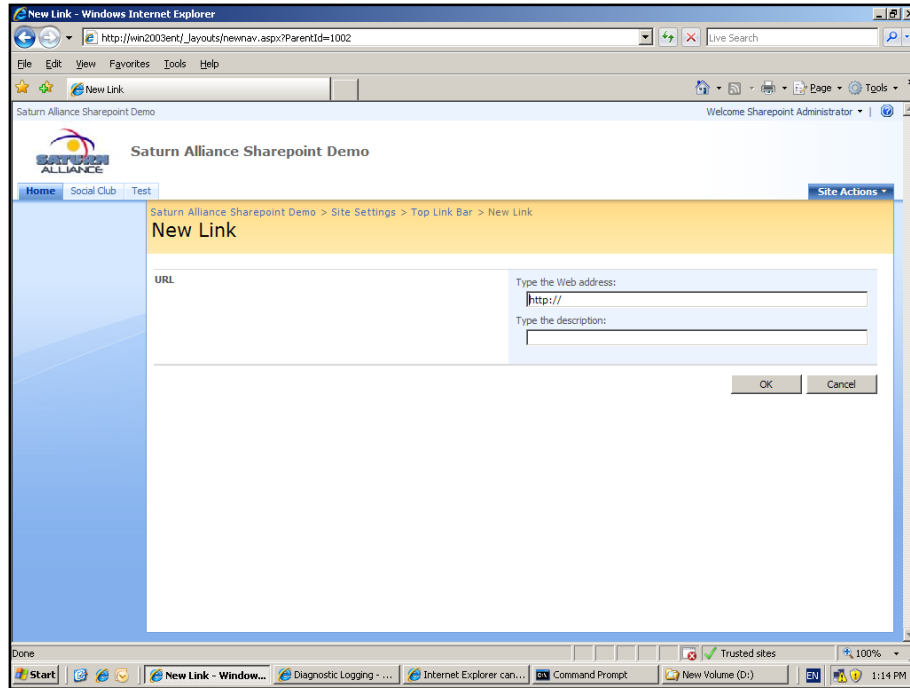
To see a preview of any theme simply click on that theme and the preview on the left will change. When you have found a suitable theme simply press the **OK** button to apply that theme to the whole site (excluding sub-sites). You can return at any point and change the theme again as required.



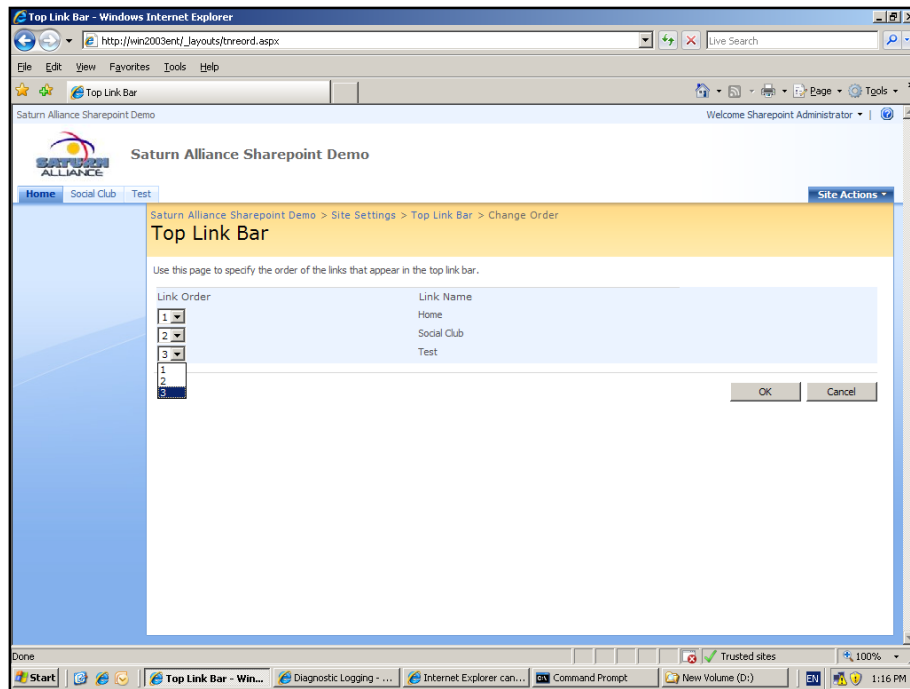
6.8 Top Link Bar

Every time you create a sub-site you are given the option of whether you also want to automatically create a link in the top link bar. These links appear like tabs across the top of the WSS v3 site just under the site name and logo in the top left of the screen. Using this option it is possible to not only add additional links but also change the order in which they appear.

Chapter 6 – Site settings

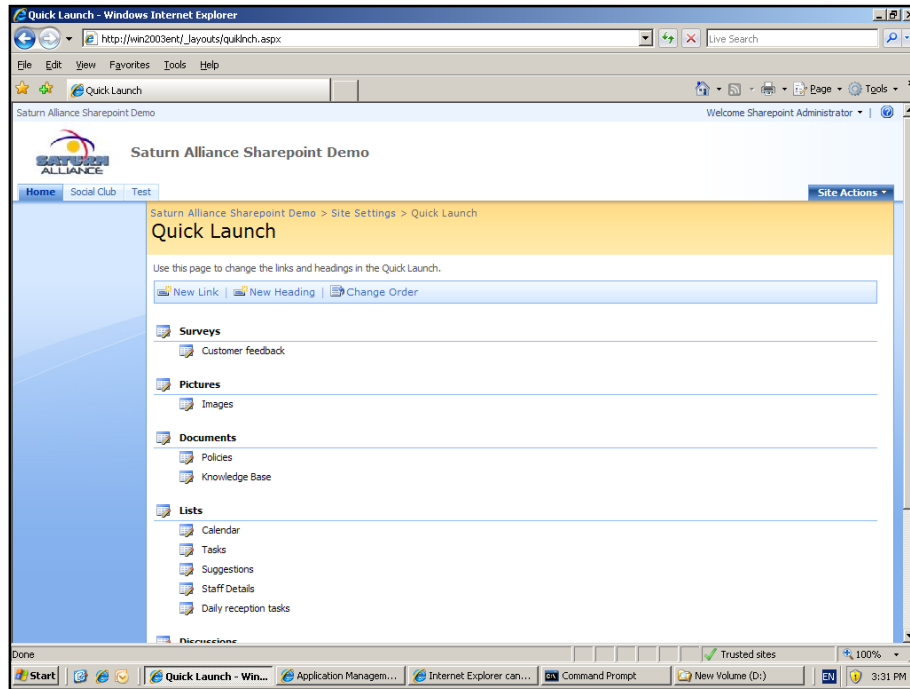


To add a link, simply click the *New Link* option from the menu bar. On the following screen simply enter the details for the link. Remember that the link can be any URL, that is, one that points to an existing location on WSS v3 or to any valid location including Internet web sites.



Chapter 6 – Site settings

To change the order in which the links appear across the page select the *Change order* option from the menu bar. On the following screen change the *Link Order* values to rearrange how you wish them to appear across the page. Press the **OK** button when complete.



6.9 Quick Launch

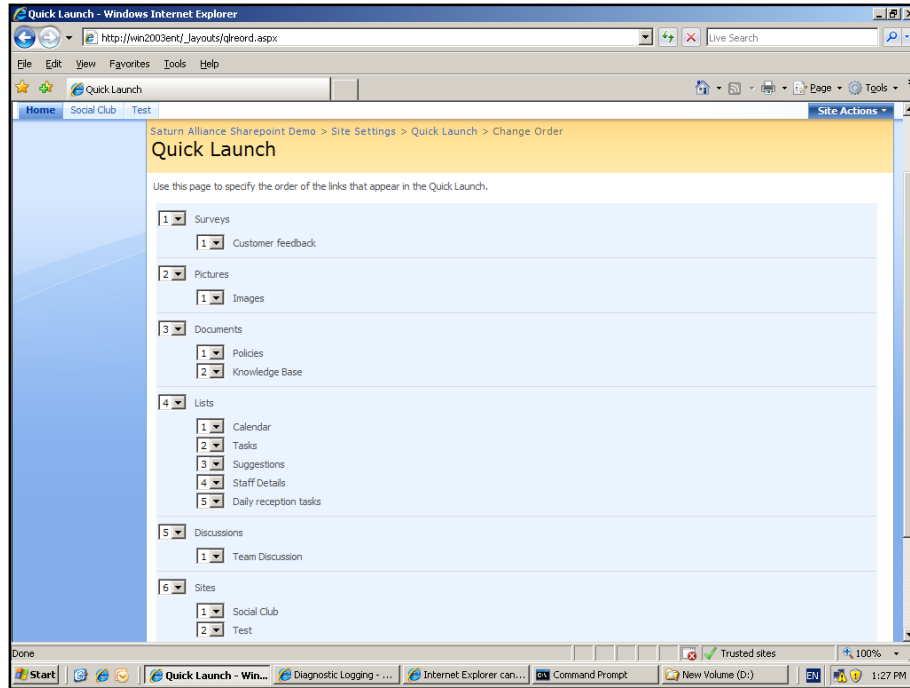
The Quick launch is the menu that appears by default down the left hand side of a WSS v3 site. Selecting this option will allow you to modify the settings for this.

To modify the location of where any of the links point simply click on the *edit icon* in front of any item and change it.

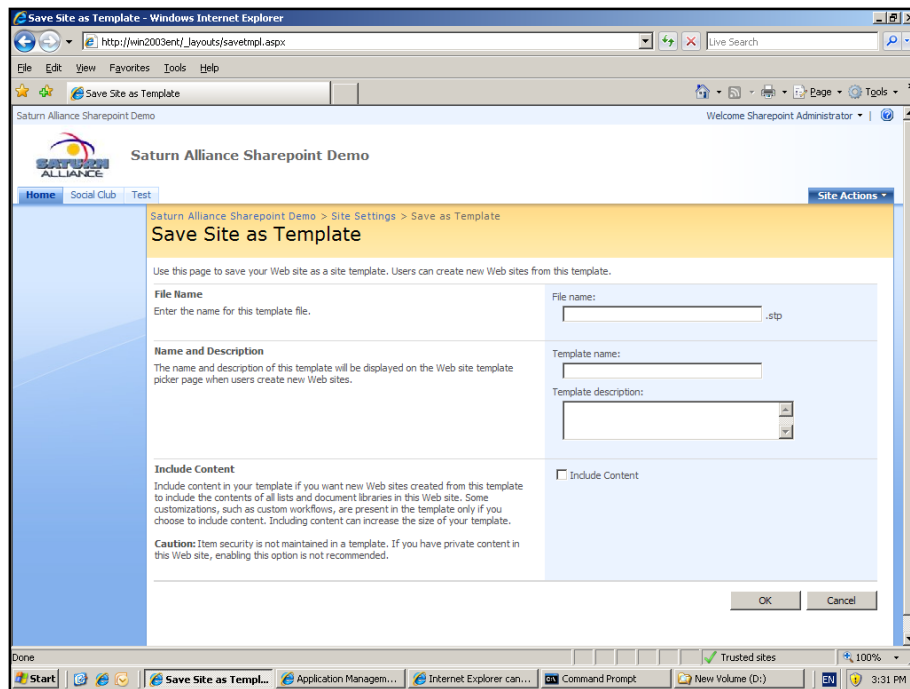
To create a new link simply click on the *New Link* option from the menu bar and enter the appropriate URL details.

To create a new heading under which the links will appear simply press the *New Heading* option from the menu bar.

Chapter 6 – Site settings



To change the order in which the links appear in the Quick Launch area simply click the *Change Order* option from the menu and adjust the position, via a pull down, according to the numbers.



6.10 Save site as a template

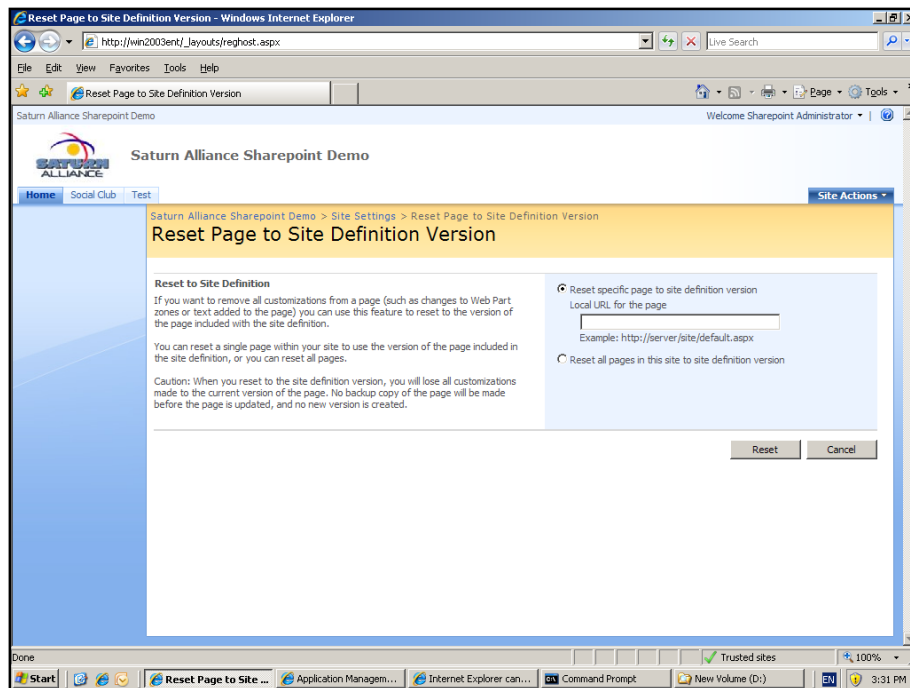
Chapter 6 – Site settings

There are a number of reasons that you may wish to save the existing site as a template. Firstly, if you have done a lot of customization to the site or you wish a standard to be maintained across your site then you can save what you have created and re-use it when you create a new sub-site.

A second reason to create a site template would be if you are planning to move a site to another location as part of a migration. If you select the option to *Include content*, then provided the data doesn't exceed 500MB you can move the entire site and all its data to another location.

Finally, once you save a site as a template you can not only use it within the same site as discussed above but, via the *Site Galleries*, you can save the site template (and data) to another WSS v3 site. This is very handy if you are migrating or looking to standardize across different WSS v3 servers. See **Chapter 7 – Migration and Upgrades** for more information.

For information about site templates see **Chapter 10 – Templates**.



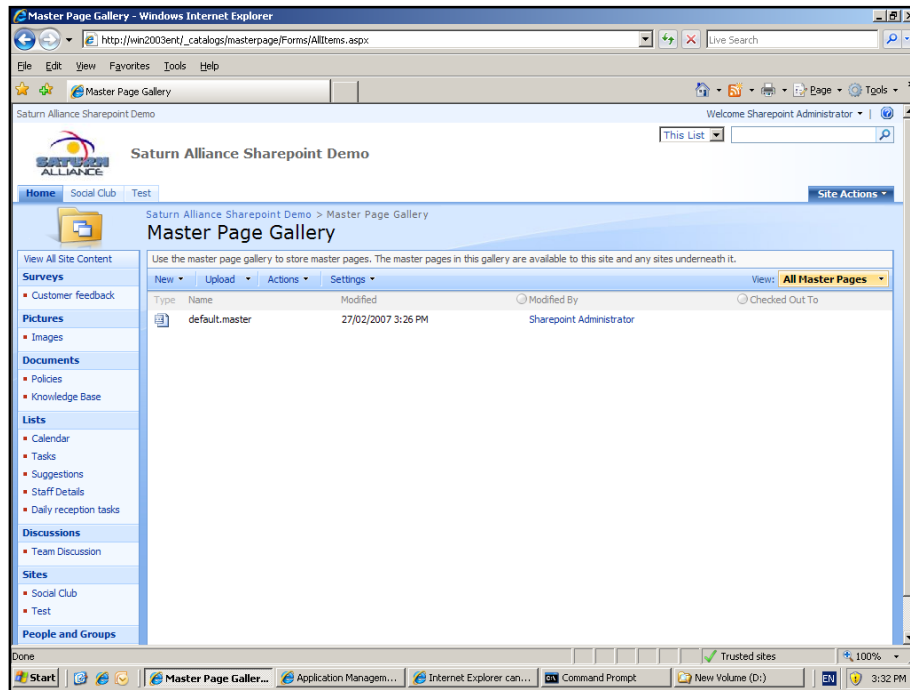
6.11 Reset page to site definition version

If you want to remove all customizations from a page (such as changes to Web Part zones or text added to the page) you can use this feature to reset to the version of the page included with the site definition.

Chapter 6 – Site settings

You can reset a single page within your site to use the version of the page included in the site definition, or you can reset all pages.

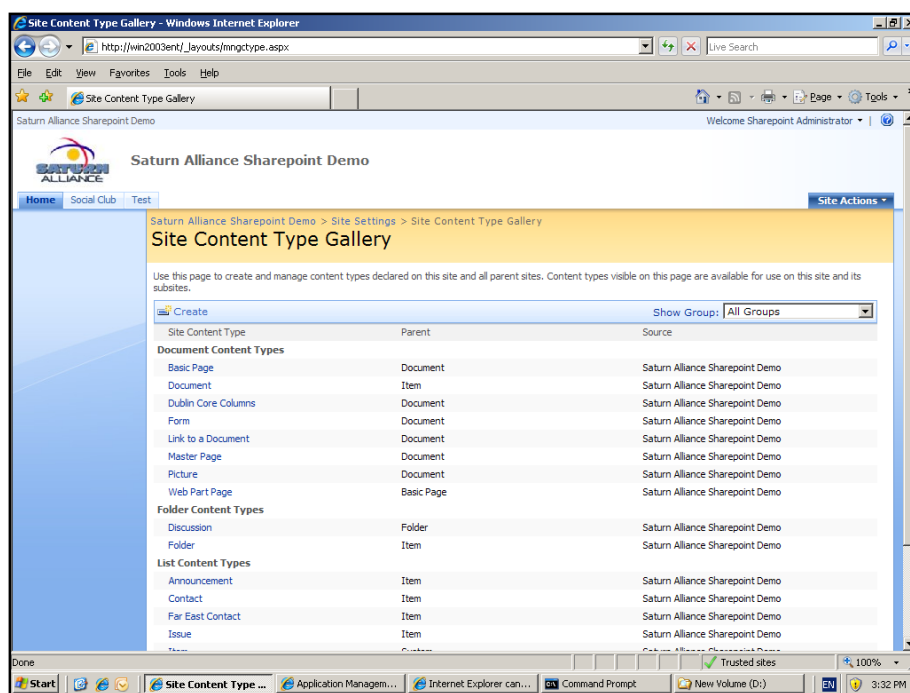
When you reset to the site definition version, you will lose all customizations made to the current version of the page. No backup copy of the page will be made before the page is updated, and no new version is created.



6.12 Master Page Gallery

Master pages control the look and feel of all the pages in your WSS v3 site. It is possible to base your site on a number of different Master pages for a different user experience in different locations. In this gallery you can upload and maintain the list of pages on which your site is based.

Chapter 6 – Site settings



6.13 Site content types

A content type is a reusable collection of settings defined in WSS v3. These enable you to manage the metadata and behavior of a document or item types in a centralized, reusable way. Because content types can be defined independently of any specific list or document library, you can make a given content type available for the lists on multiple WSS v3 sites. This enables you to centrally define and manage the types of content you store in your site collection. For example, you could use a specification content type to ensure that all software specifications track the same metadata, even if those specifications are stored across multiple sites.

Site content types can contain a number of elements:

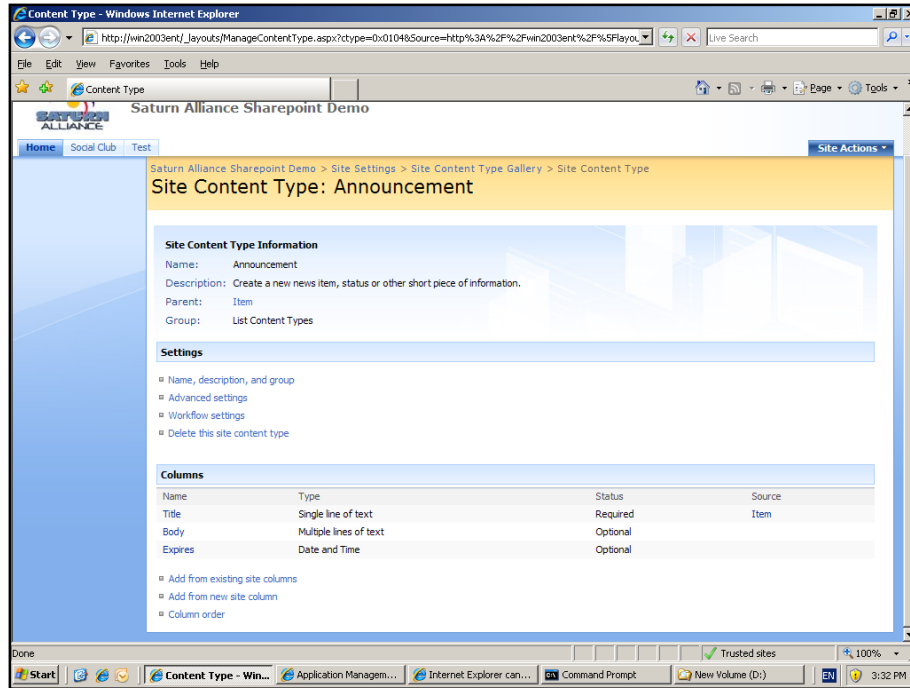
Document Template – Specifically related to content that may contain standard settings such as headers and footers.

Columns – used for storing metadata about the specific content. Whenever content is created these columns will be visible.

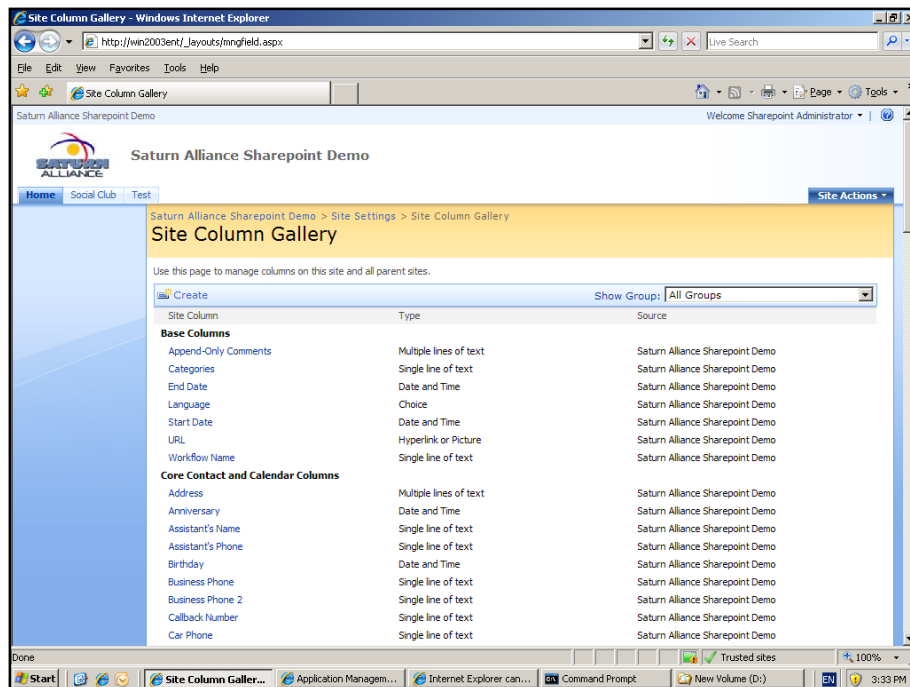
Workflows – These are predetermined actions that content will complete to help improve efficiency and standardization.

Policies – affect a document based on specific content type.

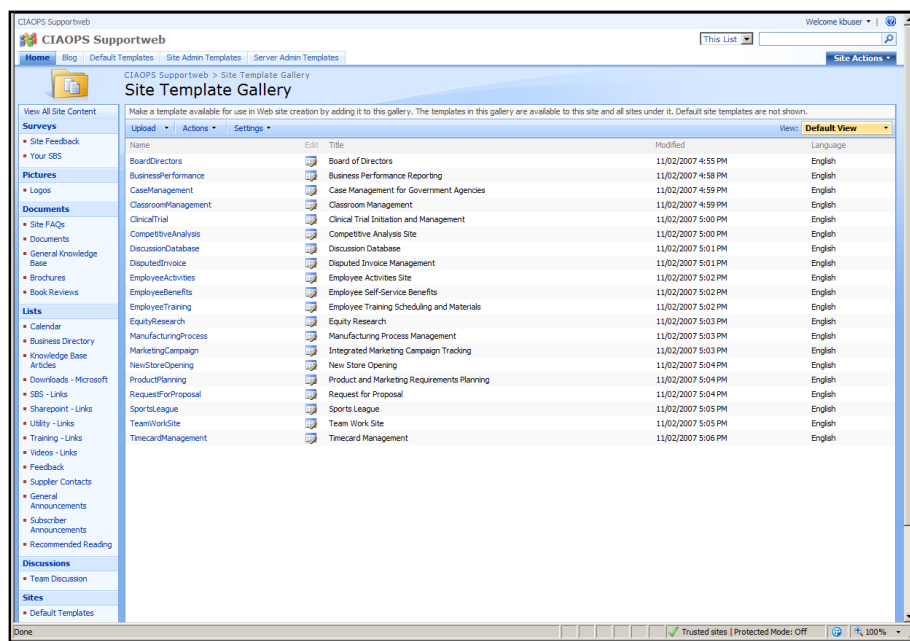
Chapter 6 – Site settings



You can create a new content type by clicking on the *Create* option in the menu bar or edit an existing type by clicking on the content type from the list below.



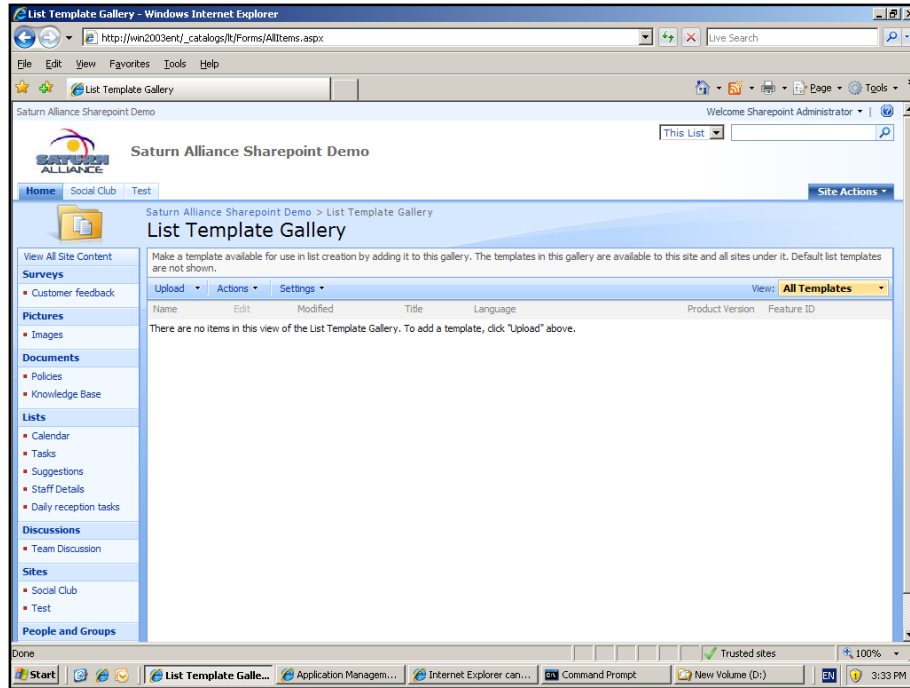
Chapter 6 – Site settings



6.15 Site template gallery

When you create a site template in WSS v3 it will be stored here. It is also possible to import templates from other locations that can be used in a WSS v3 site. For more information about working templates see **Chapter 10 – Templates**.

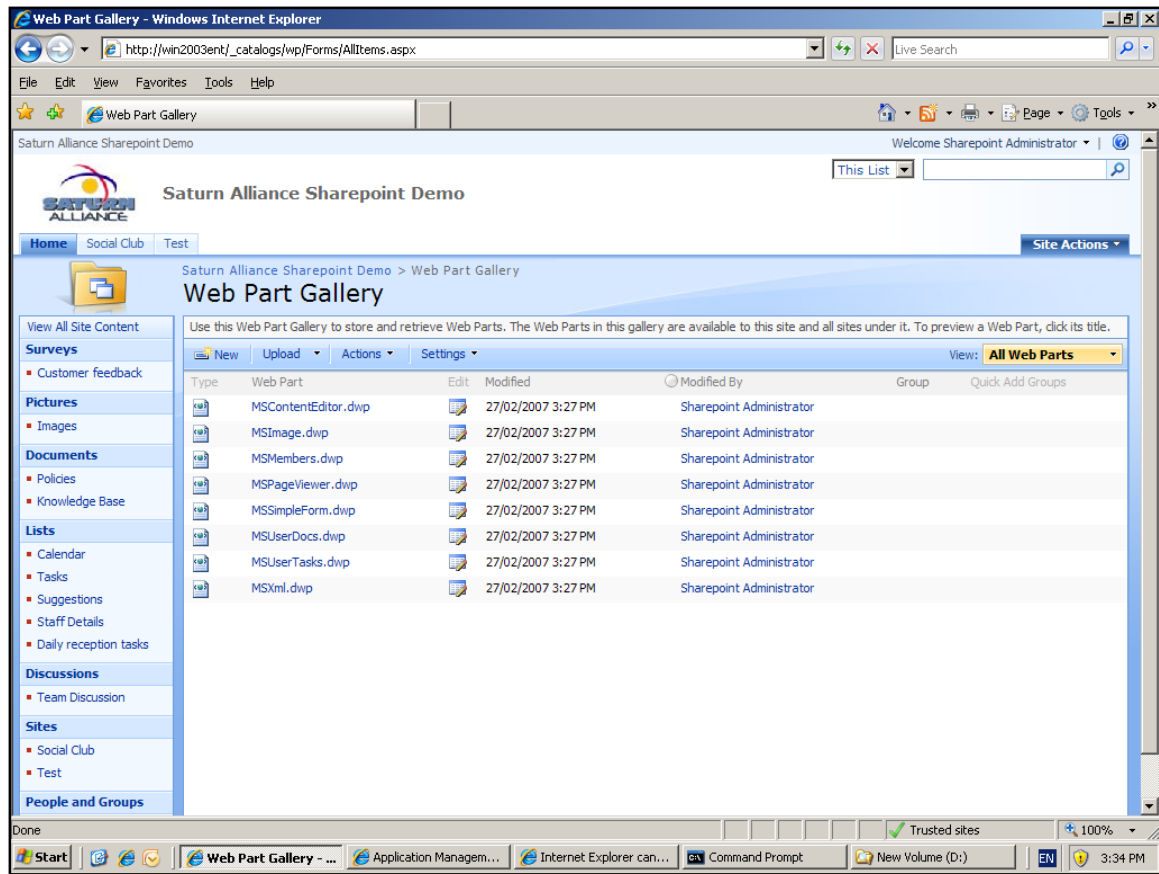
To edit or download an existing template, simply click on the name of the template. To import additional templates click on the *Upload* option from the menu bar.



6.16 List Template Gallery

Much like the site template gallery discussed above, the List Template gallery displays all the List Templates that you have created in your WSS v3 site. When you create a new list, the additional templates that you have saved on your site will appear in the *Custom Lists* section. This allows you to create a new listed based off an existing template, thereby ensuring consistency.

Chapter 6 – Site settings



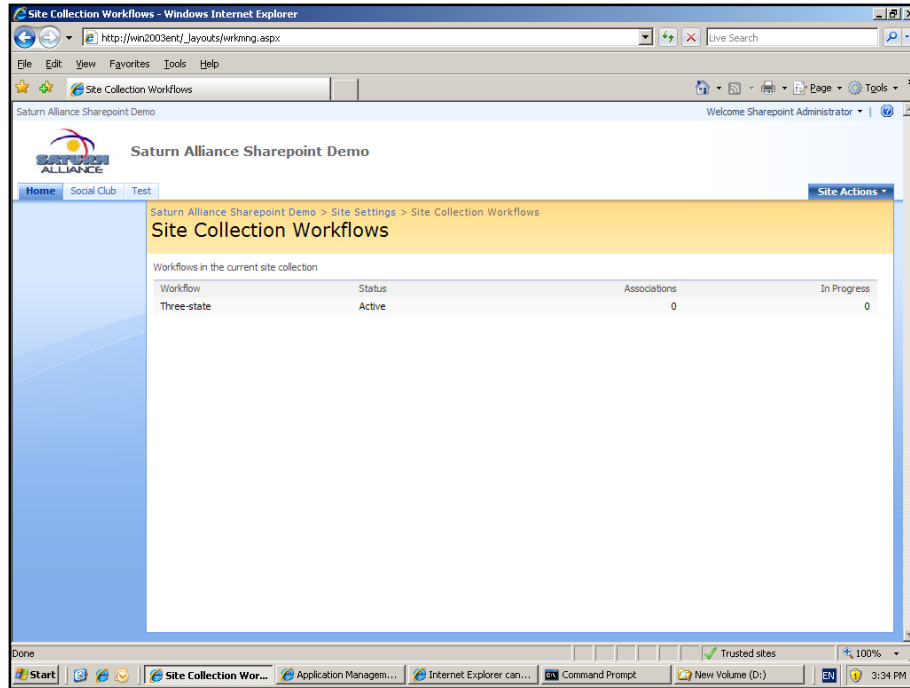
6.17 Web Part Gallery

Web parts are items that can be added to web part pages to display data from other locations within your WSS v3 site and from elsewhere (e.g. the Internet). Nearly every item you create in WSS v3, lists, calendars, document libraries and so on also has a web part associated with it. This means you can use that web part to display data from that list, calendar or document library in another area on your site. This is extremely handy for creating things like dashboards.

Apart from the built in web parts, it is also possible to download and install into your WSS v3 site a number of third party web parts that can perform a variety of functions. These web parts have been developed independently of Microsoft.

The list of web parts that are included in WSS v3 will appear in this list. To get a preview of how the web part appears simply click on the Web Part name. To edit the properties of the web part, click on the *Edit* icon.

Chapter 6 – Site settings



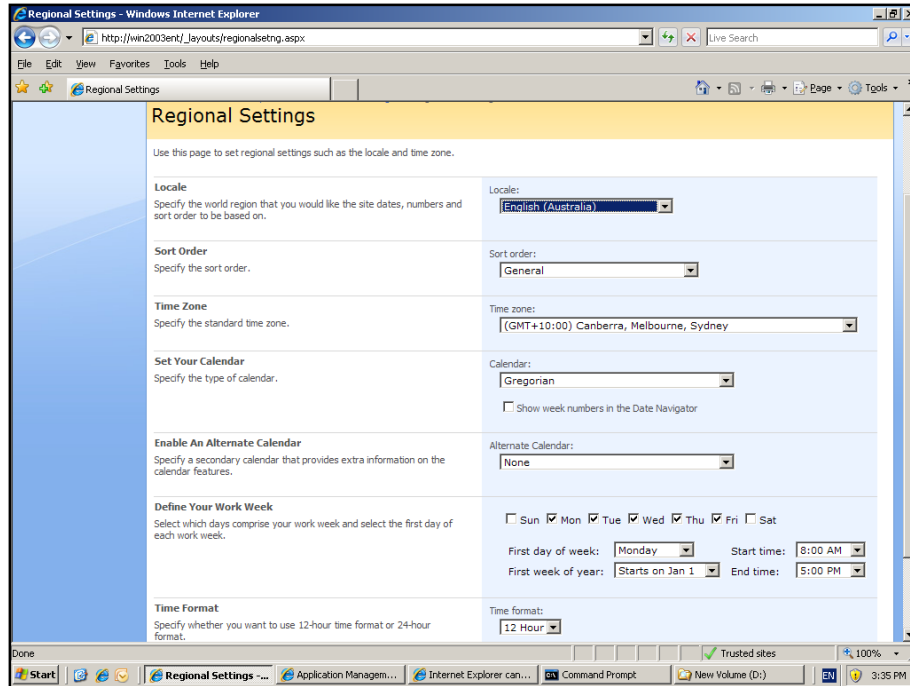
6.18 Workflows

You can define a workflow as a business process or a chain of events that need to be performed in a certain order to accomplish a certain goal. Most businesses have a number of standard processes they regularly perform. Automating these in WSS v3 can improve the reliability and execution of such tasks.

By default, WSS v3 only comes with a single workflow known as *Three-state*. It is expected that in the near future additional workflows will be developed by third parties. It is also possible to create additional workflows using Microsoft SharePoint Designer.

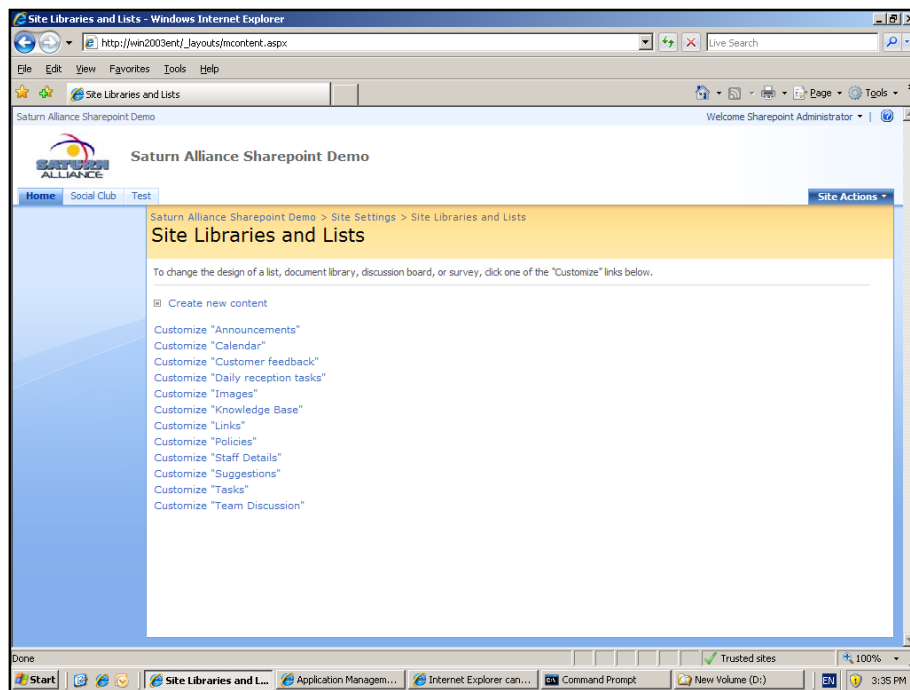
Any workflows that are available on your WSS v3 site will appear in this list.

Chapter 6 – Site settings



6.19 Regional Settings

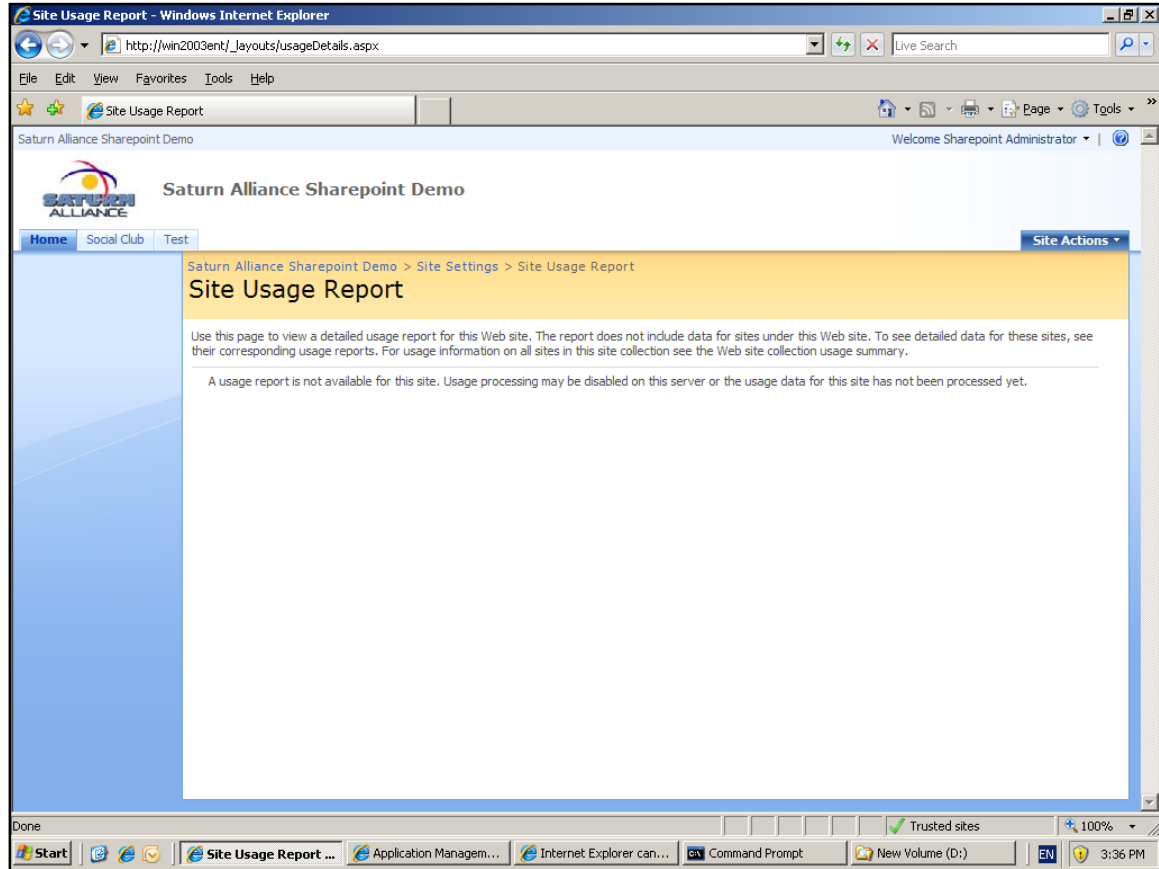
There are number of settings that you can make to ensure that your WSS v3 site conforms to local regional settings. These include Locale, time zone, work week and time format. Make the settings you desire and press **OK** to save.



Chapter 6 – Site settings

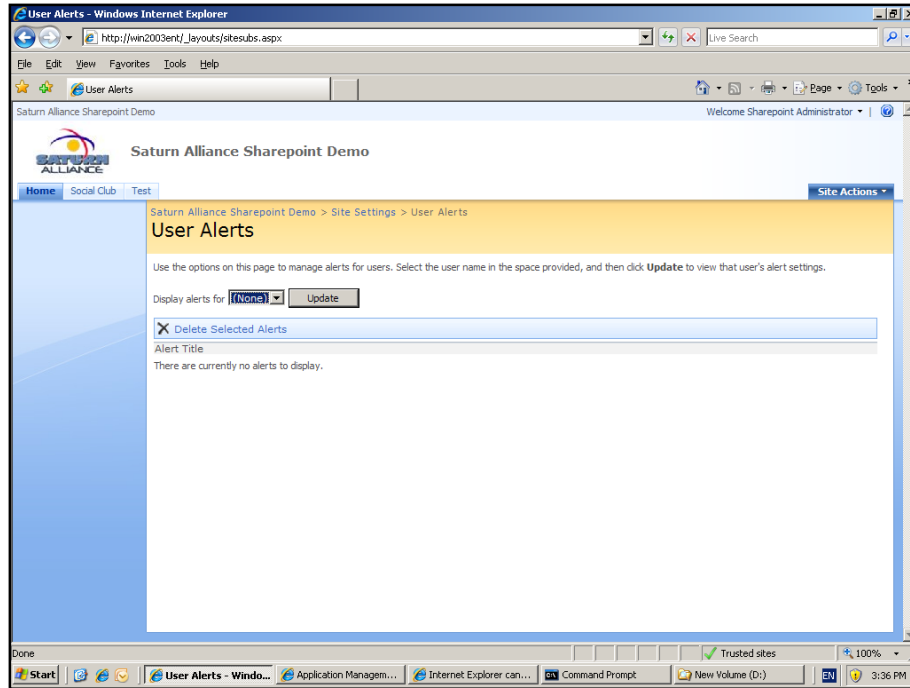
6.20 Lists and Libraries

This option will provide you with a complete list of all the site libraries and lists that appear in your site. You can customize them by simply click on the list from the display.



6.21 Usage Report

After you have enabled the ability of WSS v3 to produce usage reports you can view them for the current site here. For more information about configuring Site Usage Reports see **Chapter 9 – Advanced configuration**.

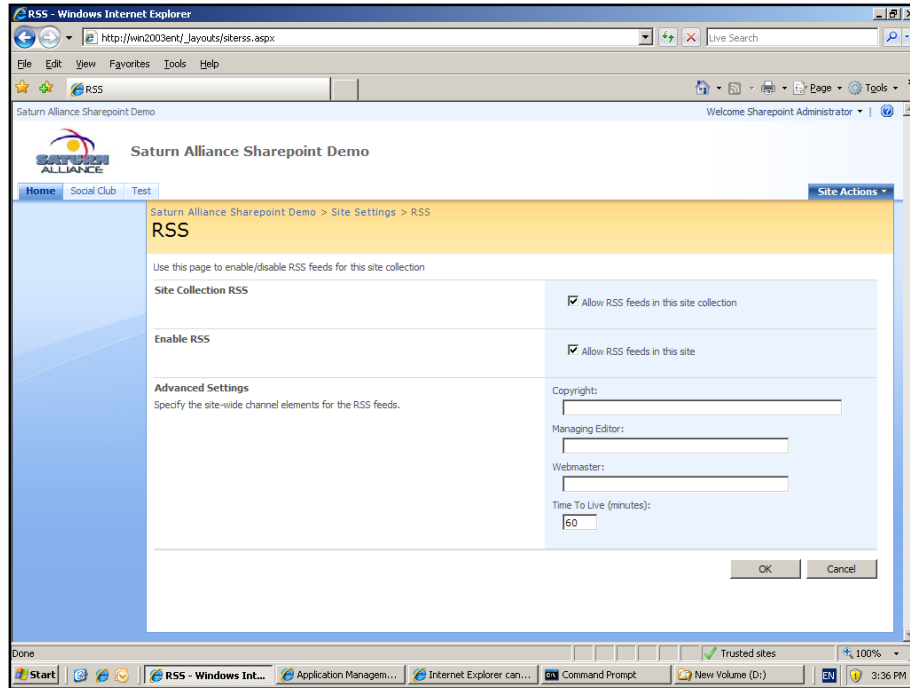


6.22 User Alerts

It is possible with WSS v3 for users to configure alerts to inform them when changes to specific parts of WSS v3 content have been made. Because these alerts can be configured in many different locations it may be difficult for a user to locate exactly where they have enabled these alerts.

Using this option under site settings you can view all the alerts for a specific user. From there it is also possible to delete unwanted alerts.

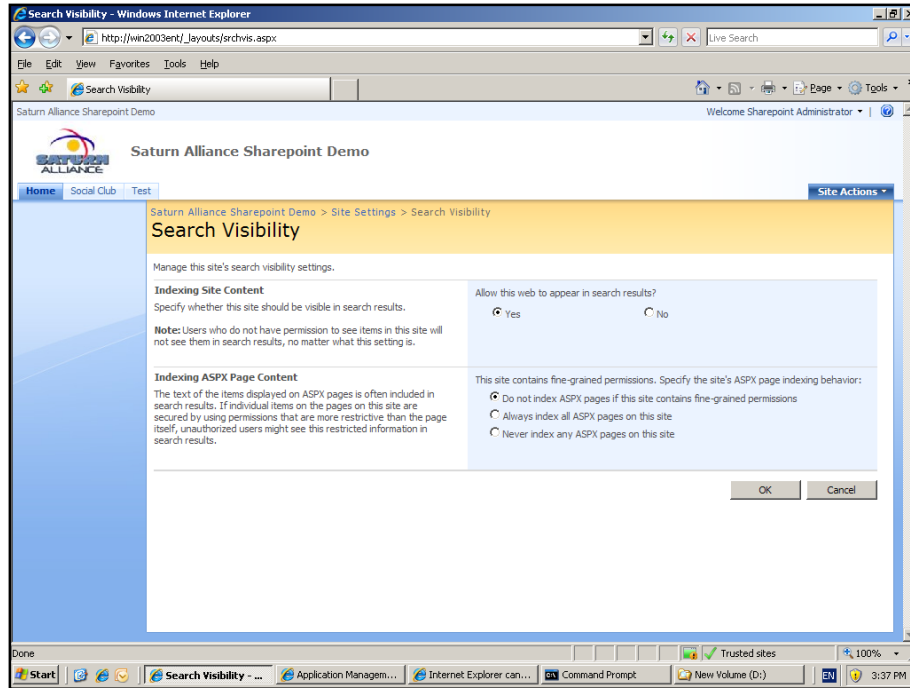
Chapter 6 – Site settings



6.23 RSS

RSS stands for Really Simple Syndication and is a way to push information from WSS v3 to other applications that can read RSS (like Outlook 2007 for example). Just about every component of WSS v3 is RSS enabled, allowing information to be pushed out to clients who can view updates without necessarily having to visit the WSS v3 site. Using the option here you can choose whether to enable or disable RSS for the entire site.

For more information about configuring RSS see **Chapter 9 – Advanced Configuration**.

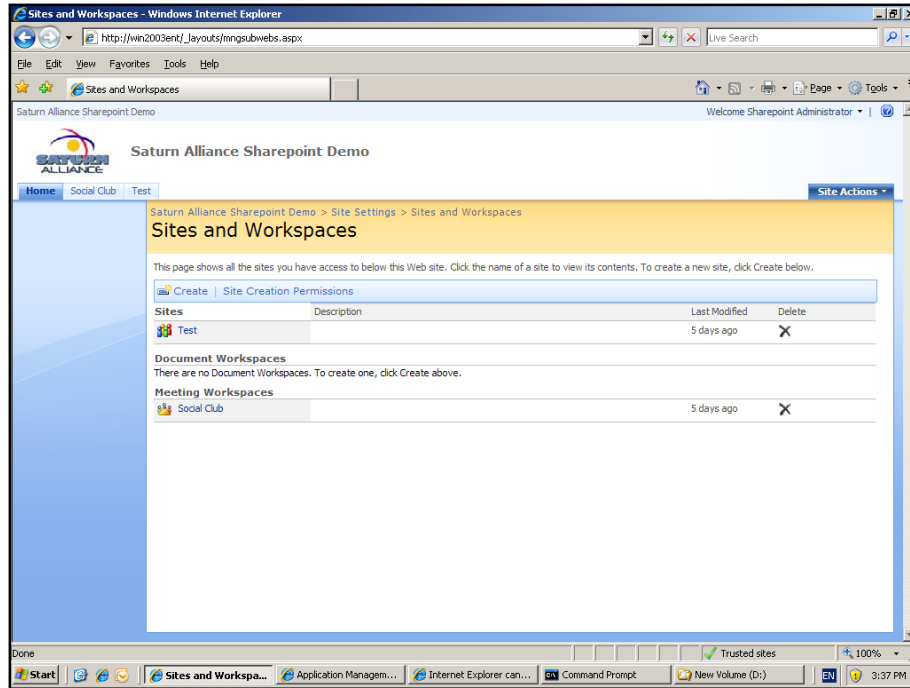


6.24 Search Visibility

Using this option it is possible to configure whether you wish this particular site to be included in any search results. There may be privacy or confidentiality requirements for site not to appear.

The second option basically allows you to alter the ability to search ASPX pages based on their security settings.

Chapter 6 – Site settings

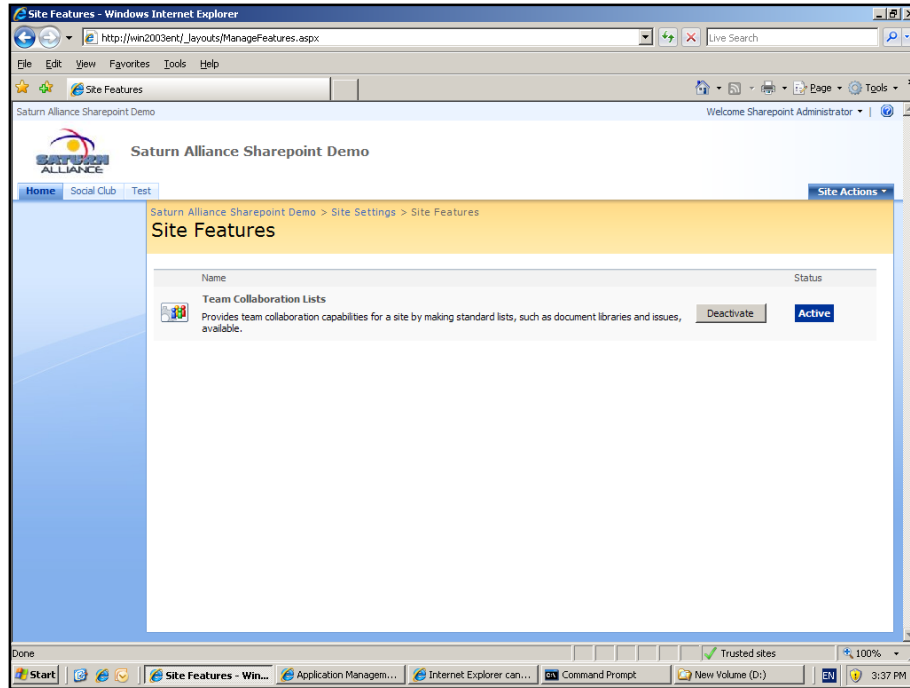


6.25 Sites and Workspaces

Your WSS v3 site may be parent to a number of other sites (known as sub-sites). Using this option in *Site Settings* you can quickly and easily see what sub-sites are configured as well as when they were last modified and what type of site they are. You are also able to delete the sub-site directly from this page by selecting the delete option. You can also access a sub-site by simply clicking on its name.

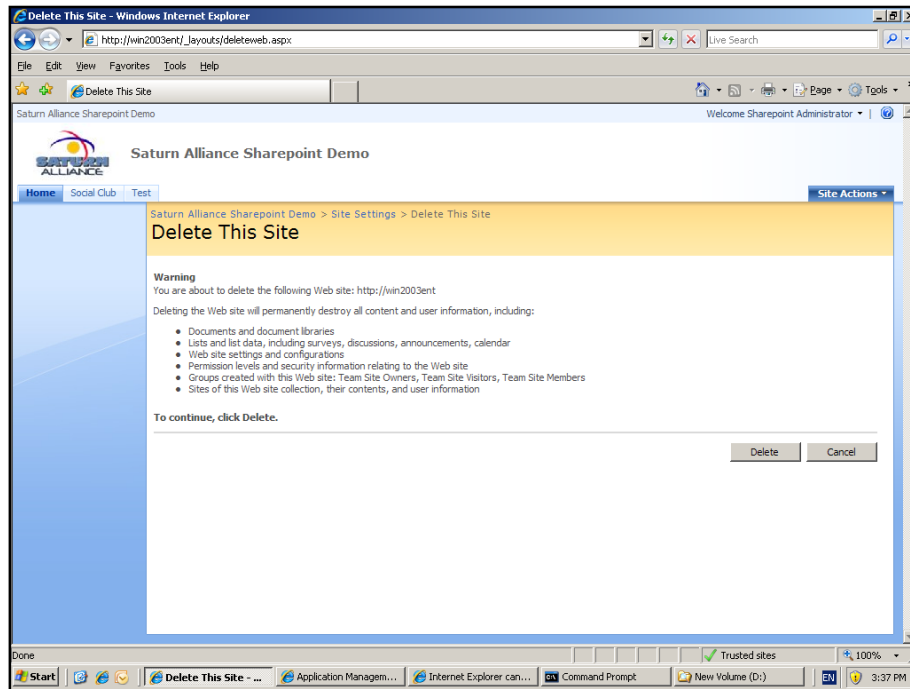
From here you can also create a new site via the *Create* button as well as set *Site Creation Permissions*.

Chapter 6 – Site settings



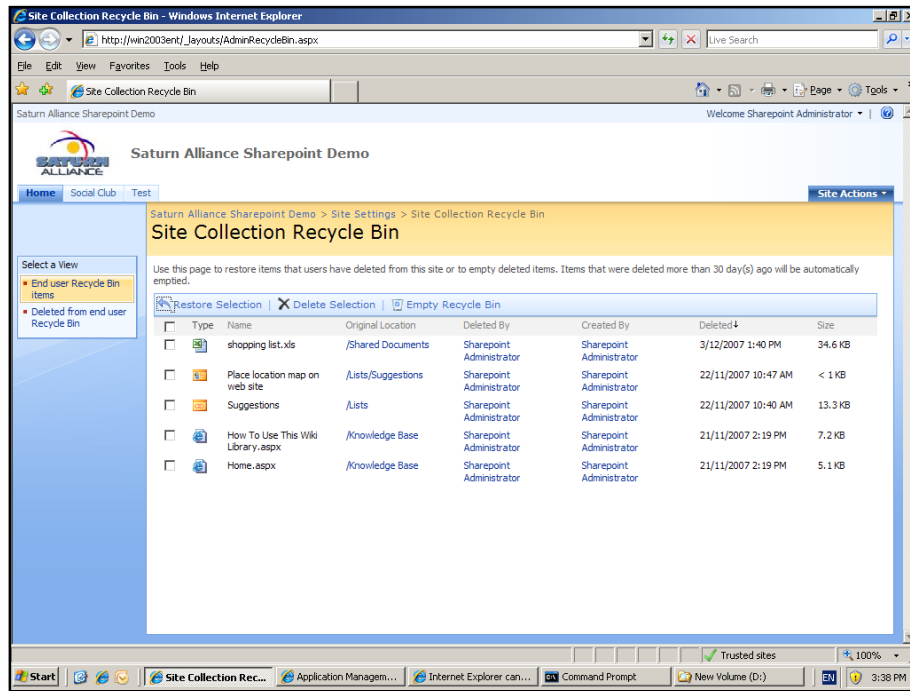
6.26 Site features

Site features extend the functionality of the WSS v3 site. A list of these is shown here as well as their current status. It is possible to activate or deactivate these as required. These features are only available to the current site.



6.27 Delete this Site

If you want to delete the current site and all the data contained therein you can by pressing the **Delete** button. However, you should never delete the top site since this will make the whole WSS v3 collection unusable.



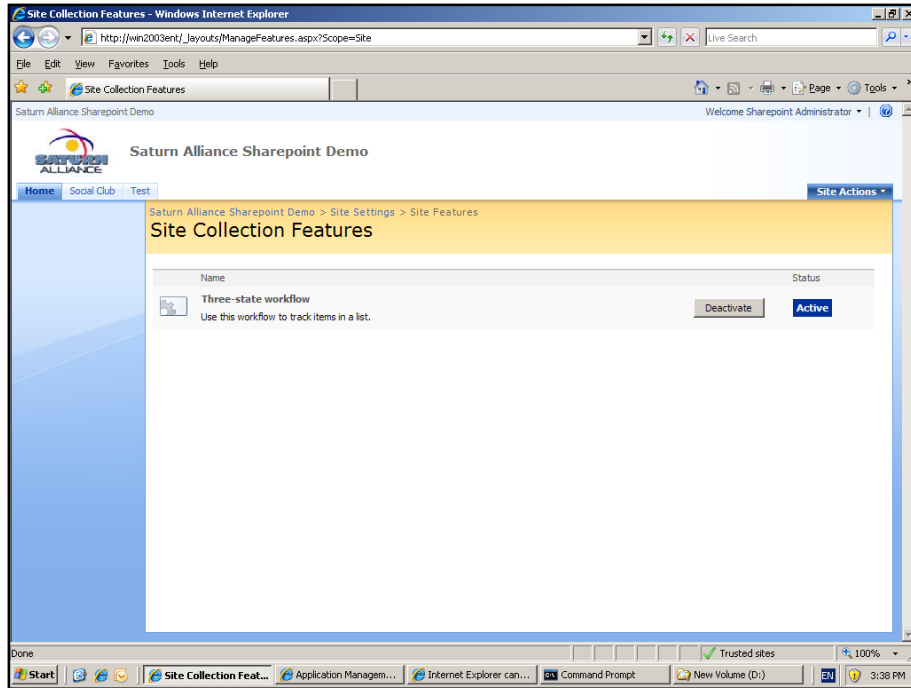
6.28 Site Collection recycle bin

When a user deletes most things (excluding sub-sites) from WSS v3 it will initially be sent to their WSS v3 recycle bin so it can be recovered quickly if required. After the default 30 days the end user recycle bin is emptied and the information is transferred to the *Site Collection Recycle bin*.

Using this option, a site administrator or owner can recover deleted information from the end users Recycle Bin or the Site Collection recycle bin. Simply select which recycle bin you wish to work with on the left hand side *Quick Start* menu and then select the item to be recovered and select the *Restore Selection* option from the menu.

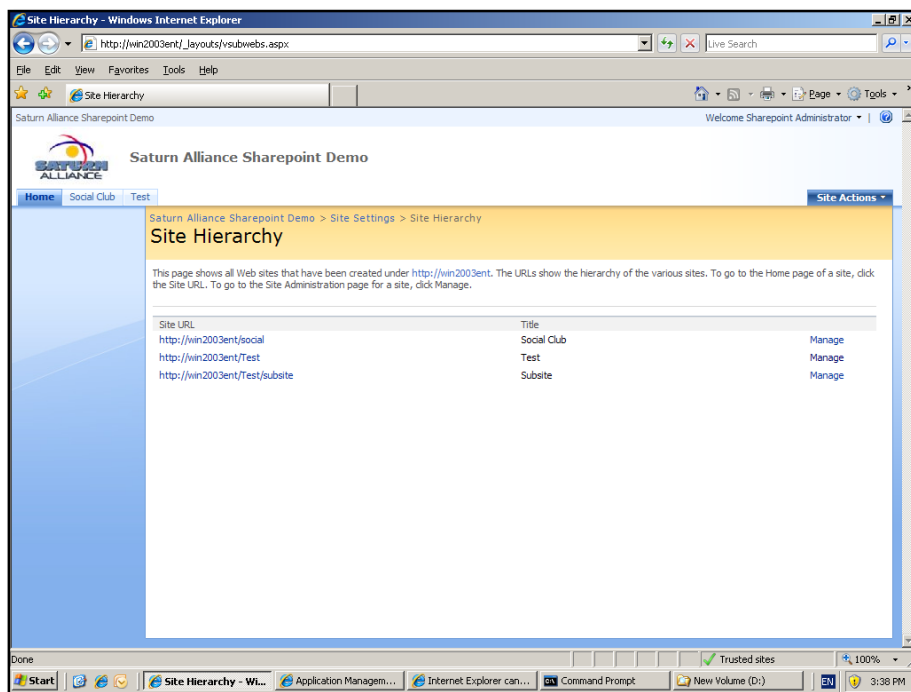
You can also choose to totally delete an item by selecting the item and pressing the *Delete Selection* from the menu bar. Finally, you can also empty the whole recycle bin by selecting the *Empty Recycle bin* option from the menu bar.

Chapter 6 – Site settings



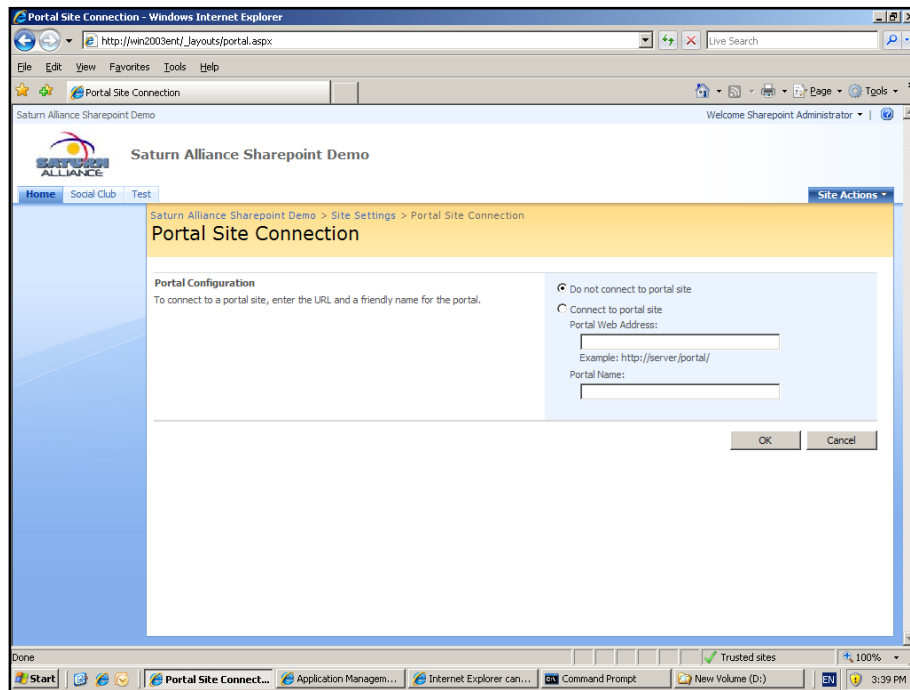
6.29 Site Collection features

Site Collection features extend the functionality of the WSS v3 site. A list of these is shown here as well as their current status. It is possible to activate or deactivate these as required. The features lists here are available across the whole site collection (i.e. this site and all sub-sites).



6.30 Site Hierarchy

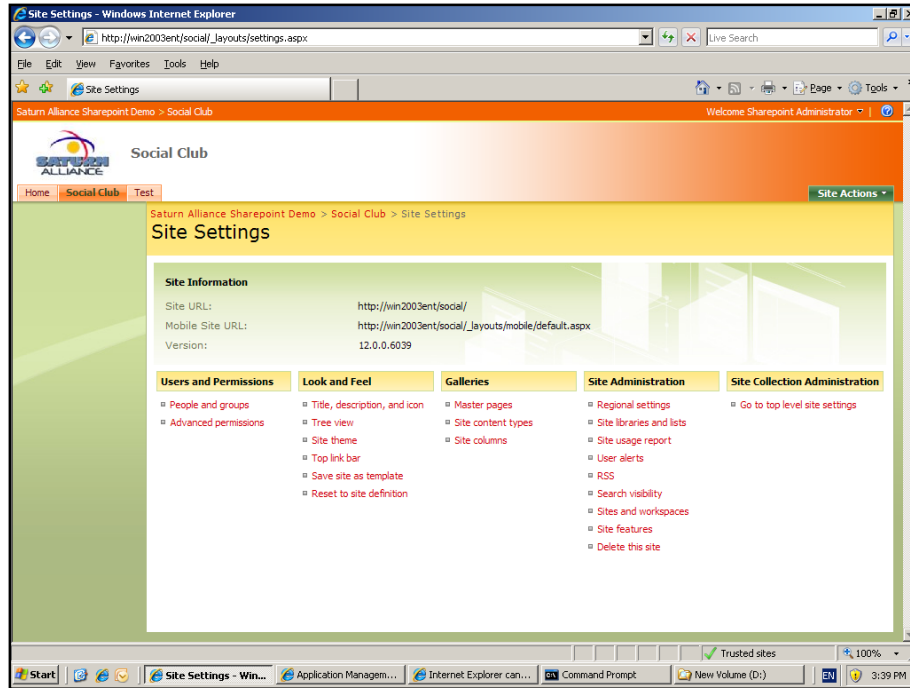
This page shows all web sites that have been created under the site. The URL's show the hierarchy of the various sites. To view any of the sites simply click on the name of the site. To go to the administration for that site, click on the *Manage* link to the right of the URL.



6.31 Portal Site Connection

Because WSS v3 is a building block of MOSS (Microsoft Office SharePoint Server) you can link any top site that you create to an existing portal.

Chapter 6 – Site settings



6.32 Sub-site settings

You will notice that if you go into the site settings in a WSS v3 sub-site the menu will all appear the same except for the *Site Collection Administration* heading. As shown above you will see that this group now only has a single link *Go to top level site settings*. This link will take you to the top level site where you can perform the unique settings only available at the top level.

6.33 Conclusion

This guide continues to be a work in progress and I encourage comments and feedback of any type. The only way that the Guide will improve if these is continued feedback.

Please send your comments and feedback to director@ciaops.com.