

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
- 6.16 List Template Gallery
- 6.17 Web Part Gallery
- 6.18 Workflows
- 6.19 Regional Settings
- 6.20 Lists and Libraries
- 6.22 User Alerts
- 6.23 RSS

Chapter 6 – Site settings

- 6.24 Search Visibility**
- 6.25 Sites and Workspaces**
- 6.26 Site features**
- 6.27 Delete this Site**
- 6.28 Site Collection recycle bin**
- 6.32 Sub-site settings**
- 6.33 Conclusion**

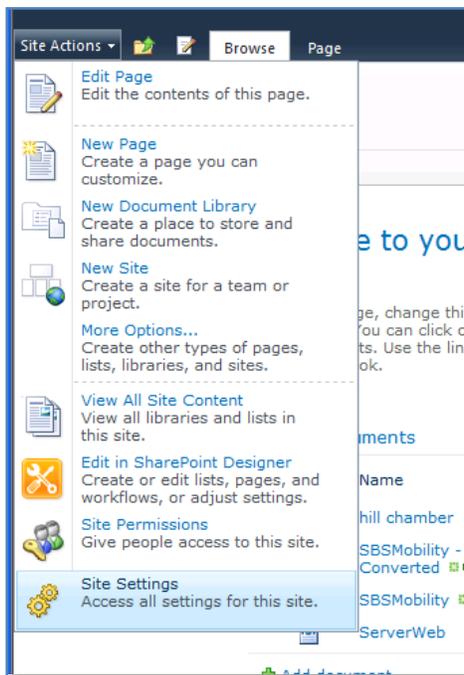
Chapter 6 – Site settings

6.1 Scope

The Site Settings option allows a Windows SharePoint Foundation 2010 (WSF) administrator to customize many aspects of a WSF site from within the browser. Each WSF site has its own settings with the default site or top level having a number of additional options.

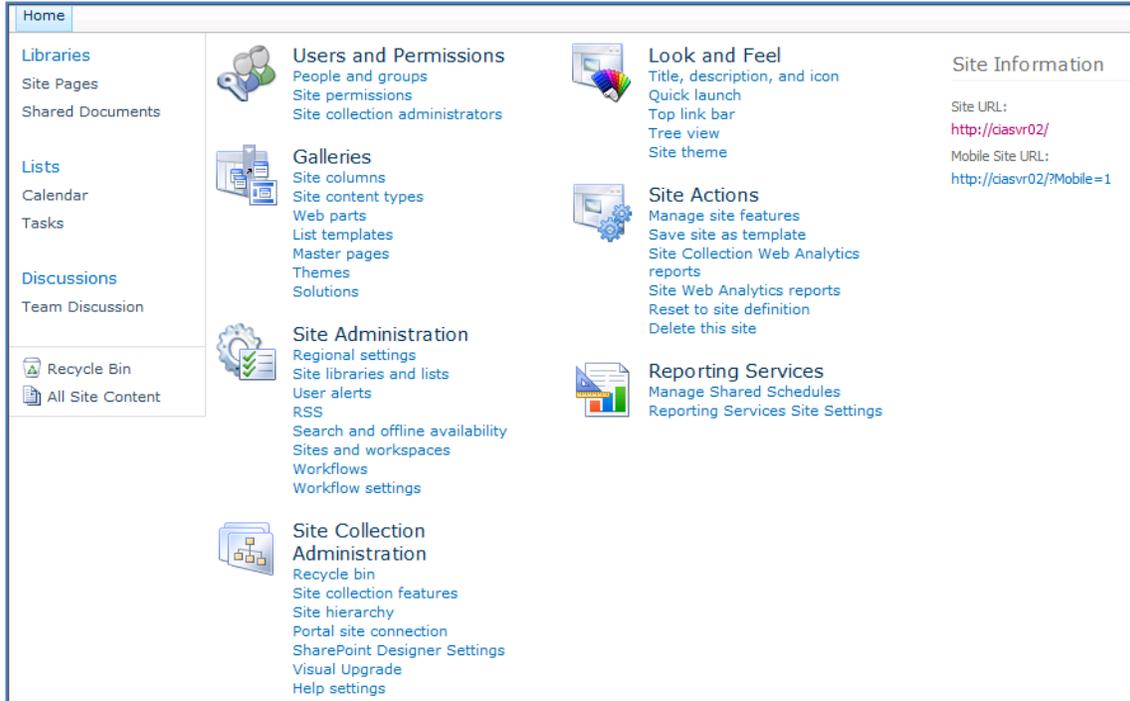
WSF Site Settings are only available to site owners and administrators with the option not even being available to other users because of WSF security trimming. This chapter will take you through all the options that are available here.

6.2 Accessing



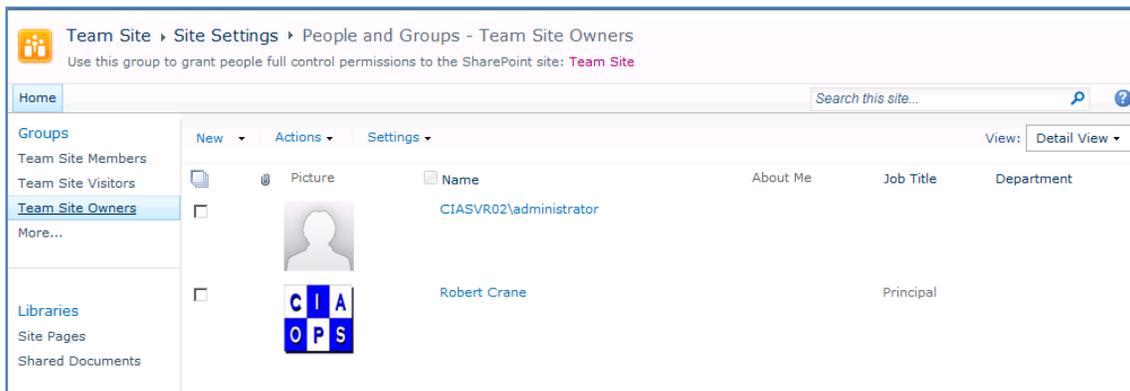
To access the site settings for any WSF site you must firstly be logged in as a WSF owner or administrator. In the top left hand side of the screen, under the site icon, you will see *Site Actions*. Click this to display the drop down menu shown above. From this menu select **Site Settings**. Remember, that each WSF 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.

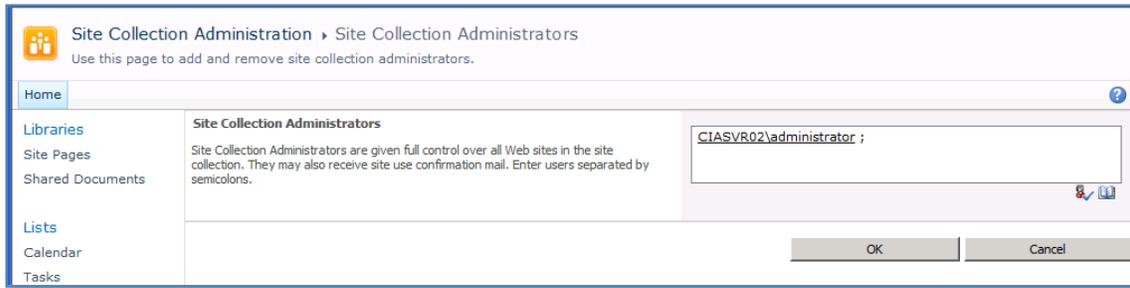
6.3 People and Groups



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

Chapter 6 – Site settings

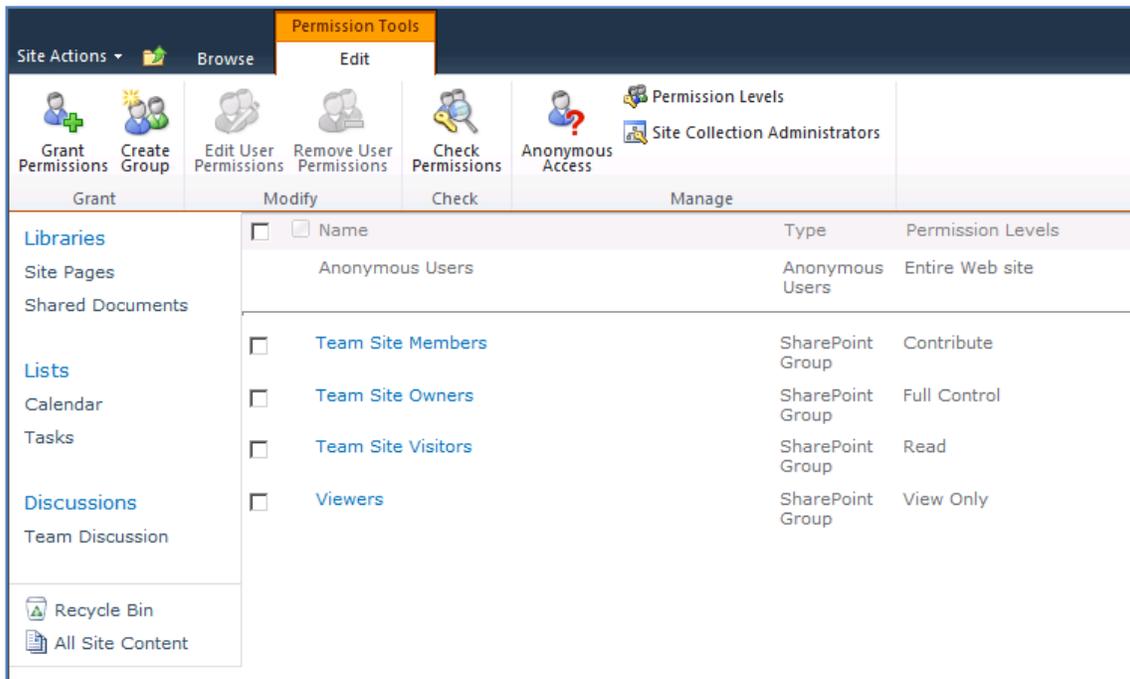
6.4 Site Collection Administrators



A site collection administrator has full rights over all the WSF 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 WSF 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.

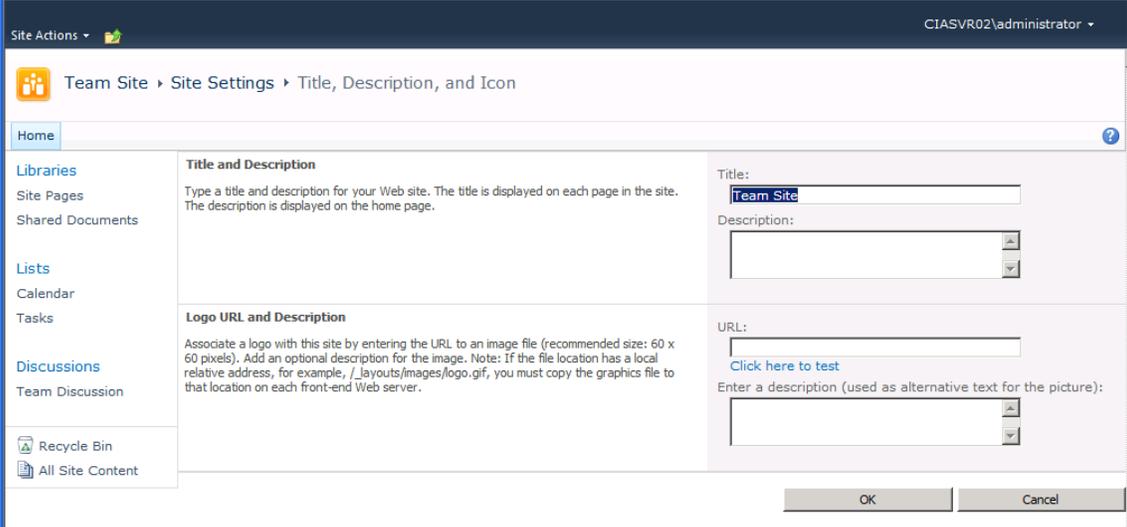
6.4 Advanced Permissions



Chapter 6 – Site settings

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 WSF groups. For more information about using this see – **Chapter 15 – Security**.

6.5 Title, Description and Icon



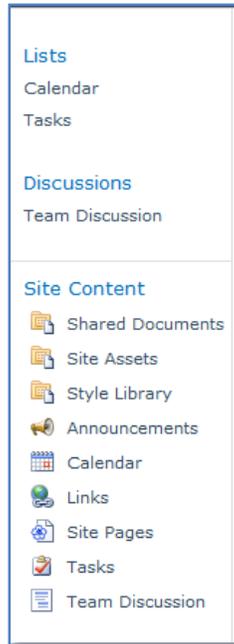
With this option you can change the *Title* and *Description* of the WSF site which appears in the upper left of the site. You also have the option to change the WSF v3 logo that appears in the upper left of the site by default. You can either select an image that is locally stored on the WSF site or 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

Enable Quick Launch Specify whether the Quick Launch should be displayed to aid navigation. The Quick Launch displays site content in a logical manner.	<input checked="" type="checkbox"/> Enable Quick Launch
Enable Tree View Specify whether a tree view should be displayed to aid navigation. The tree view displays site content in a physical manner.	<input type="checkbox"/> Enable Tree View

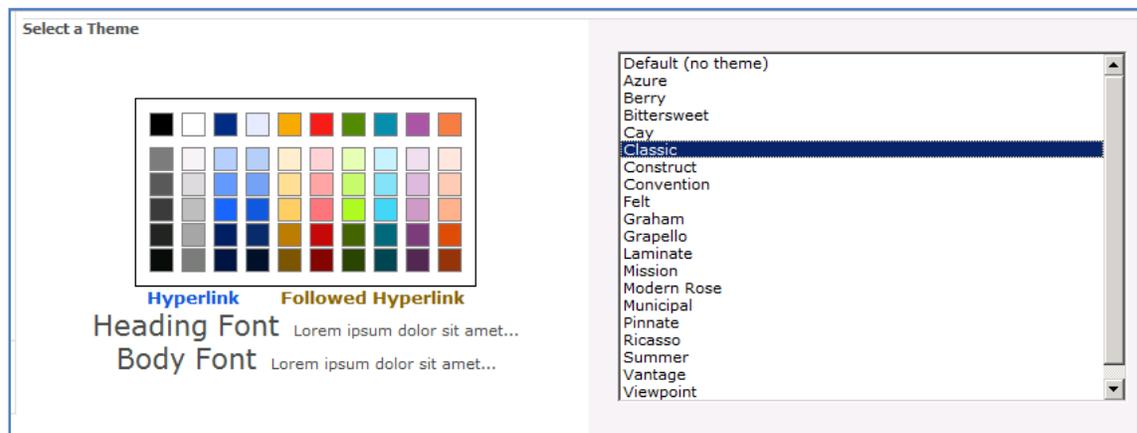
By default, tree navigation of a WSF site is turned off. You can enable it by selecting the *Enable Tree View* option. You will also see that this option allows you to turn off the *Quick Launch* menu that appears by default on the left hand side of WSF sites.

Chapter 6 – Site settings



After selecting the option to enable the Tree View of the WSF 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 WSF as a tree which allows you to see all the content of the WSF 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

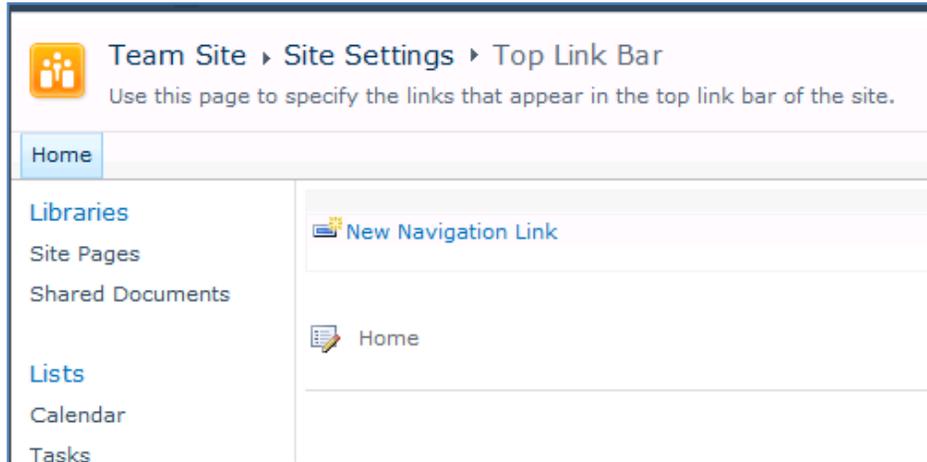


Using this option allows you to select from a number of different site themes. This is an extremely handy option when you have created a number sub-sites in WSF. It is a best practice recommendation to choose a different theme for each sub site so that it can easily be identified by users.

Chapter 6 – Site settings

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 WSF 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.



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 WSF or to any valid location including Internet web sites.

Chapter 6 – Site settings

Link Order	Link Name
1	Home
2	Social Club
3	Test

1
2
3

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

1	Libraries
1	Site Pages
2	Shared Documents
2	Lists
1	Calendar
2	Tasks
3	Discussions
1	Team Discussion

1
2
3

The *Quick launch* is the menu that appears by default down the left hand side of a WSF 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

There 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 WSF site. This is very handy if you are migrating or looking to standardize across different WSF 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

Reset to Site Definition

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.

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.

Caution: 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.

Reset specific page to site definition version
Local URL for the page

Example: "http://server/site/default.aspx"

Reset all pages in this site 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.

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.

Chapter 6 – Site settings

6.12 Master Page Gallery

<input type="checkbox"/>	Type	Name	Modified	<input type="checkbox"/>	<input type="checkbox"/>	Compatible UI Version(s)
		default.master	26/04/2010 11:25 PM	CIASVR02\administrator		3
		minimal.master	26/04/2010 11:25 PM	CIASVR02\administrator		4
		v4.master	26/04/2010 11:25 PM	CIASVR02\administrator		4

Master pages control the look and feel of all the pages in you WSF 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.

6.13 Site content types

Site Content Type	Parent	Source
Custom Content Types		
New Task	Workflow Task	Team Site
Document Content Types		
Basic Page	Document	Team Site
Document	Item	Team Site
Dublin Core Columns	Document	Team Site
Form	Document	Team Site
Link to a Document	Document	Team Site
List View Style	Document	Team Site
Master Page	Document	Team Site
Picture	Document	Team Site
Web Part Page	Basic Page	Team Site
Wiki Page	Document	Team Site
Folder Content Types		
Discussion	Folder	Team Site
Folder	Item	Team Site
Summary Task	Folder	Team Site
Group Work Content Types		
Circulation	Item	Team Site

A content type is a reusable collection of settings defined in WSF. 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 WSF 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:

Chapter 6 – Site settings

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.

Site Content Type Information

Name: [Announcement](#)

Description: [Create a new news item, status or other short piece of information.](#)

Parent: [Item](#)

Group: [List Content Types](#)

Settings

- [Name, description, and group](#)
- [Advanced settings](#)
- [Workflow settings](#)
- [Delete this site content type](#)

Columns

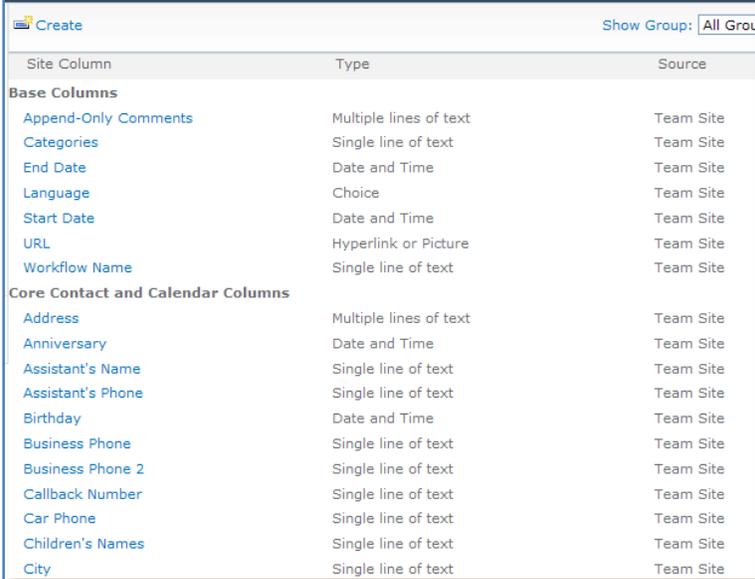
Name	Type	Status	Source
Title	Single line of text	Required	Item
Body	Multiple lines of text	Optional	
Expires	Date and Time	Optional	

- [Add from existing site columns](#)
- [Add from new site column](#)
- [Column order](#)

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.

6.14 Site Column Gallery

Chapter 6 – Site settings



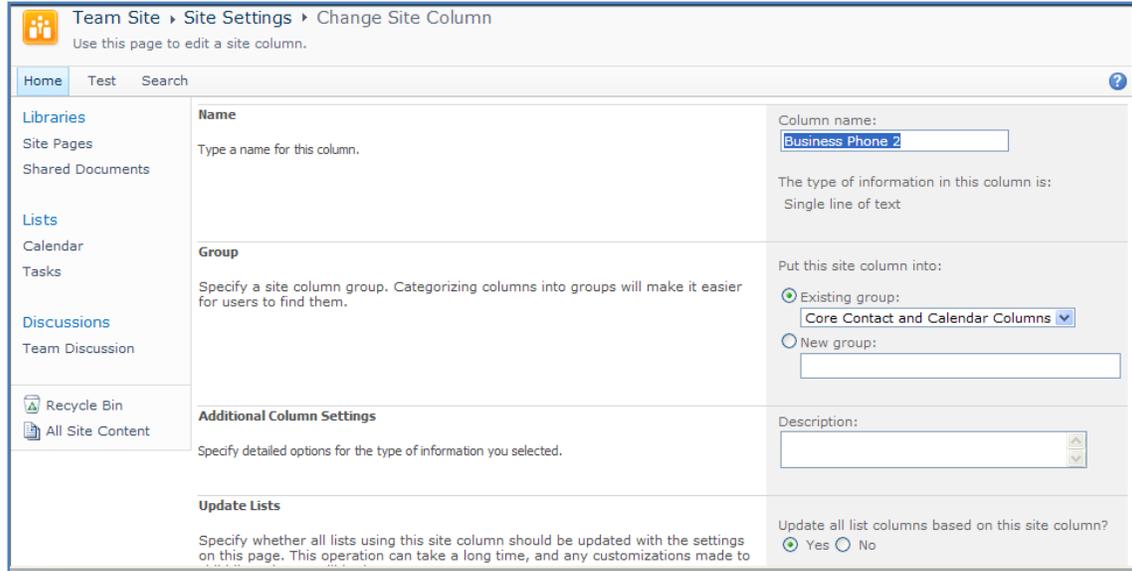
Site Column	Type	Source
Base Columns		
Append-Only Comments	Multiple lines of text	Team Site
Categories	Single line of text	Team Site
End Date	Date and Time	Team Site
Language	Choice	Team Site
Start Date	Date and Time	Team Site
URL	Hyperlink or Picture	Team Site
Workflow Name	Single line of text	Team Site
Core Contact and Calendar Columns		
Address	Multiple lines of text	Team Site
Anniversary	Date and Time	Team Site
Assistant's Name	Single line of text	Team Site
Assistant's Phone	Single line of text	Team Site
Birthday	Date and Time	Team Site
Business Phone	Single line of text	Team Site
Business Phone 2	Single line of text	Team Site
Callback Number	Single line of text	Team Site
Car Phone	Single line of text	Team Site
Children's Names	Single line of text	Team Site
City	Single line of text	Team Site

A site column is a reusable column definition, or template, that you can assign to multiple lists across multiple WSF sites. Site columns decrease rekeying and help ensure consistency of metadata across sites and lists. For example, suppose you define a site column named Customer. Users can add that column to their lists, and reference it in their content types. This ensures that the column has the same attributes, at least to start with, wherever it appears. Much like site content types, you define a site column at the site level, independent of any actual list or content type.

When you add a column to a list, WSF copies the site column locally onto the list as a list column. You can then make changes to the list column; these changes apply only to the column as it behaves on that list.

You can also create your own list columns, directly on a list. Either way, list columns apply only to the list to which you add them; they cannot be added to multiple lists.

Chapter 6 – Site settings

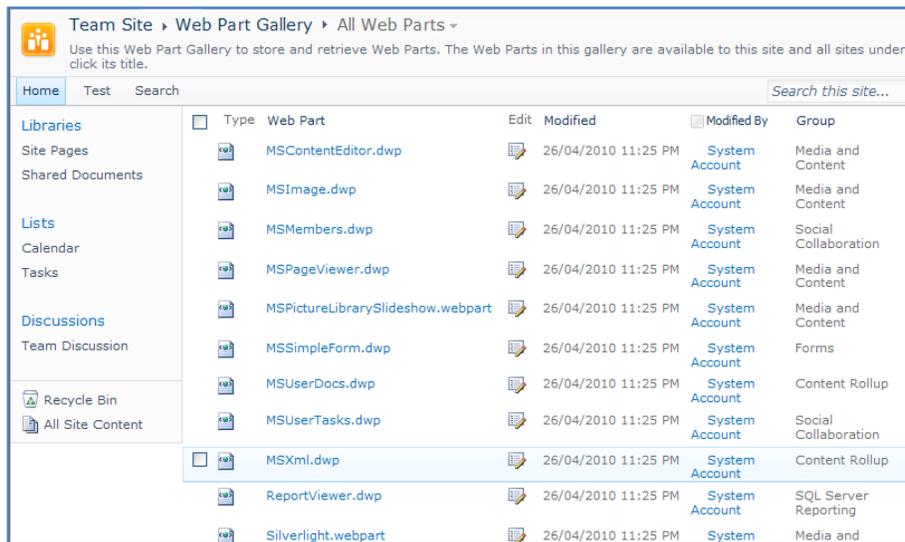


You can create a new site column by clicking on the *Create* option from the menu bar. To edit an existing site column simply click on the entry from the list listed below.

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 WSF 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.

6.17 Web Part Gallery

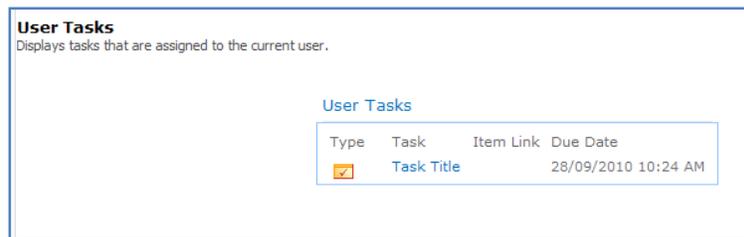


Chapter 6 – Site settings

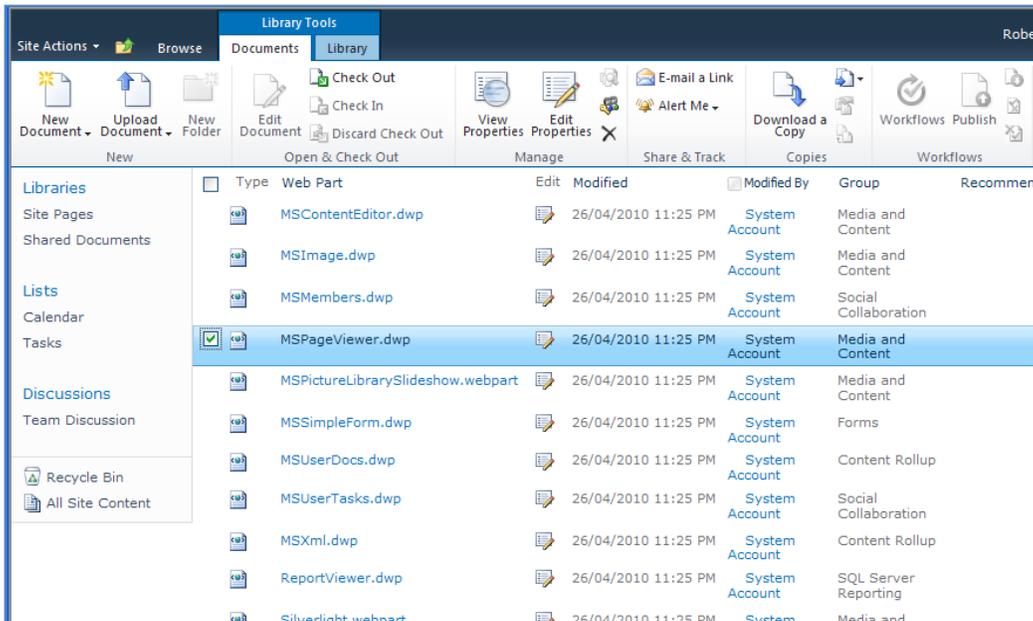
Web parts are items that can be added to web part pages to display data from other locations within your WSF site and from elsewhere (e.g. the Internet). Nearly every item you create in WSF, lists, calendars, document libraries and so on also has a web part associated with it. This means you can use 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 WSF 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 WSF 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, select the web part and use *Edit* in the ribbon interface.



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 WSF can improve the reliability and execution of such tasks.

By default, WSF 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 2010.

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

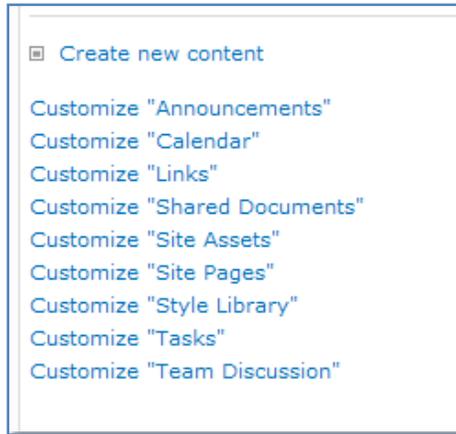
6.19 Regional Settings

Locale Select a locale from the list to specify the way the site displays numbers, dates, and time.	Locale: English (Australia)
Sort Order Specify the sort order.	Sort order: General
Time Zone Specify the standard time zone.	Time zone: (UTC+10:00) Canberra, Melbourne, Sydney
Set Your Calendar Specify the type of calendar.	Calendar: Gregorian <input type="checkbox"/> Show week numbers in the Date Navigator
Enable An Alternate Calendar Specify a secondary calendar that provides extra information on the calendar features.	Alternate Calendar: None
Define Your Work Week Select which days comprise your work week and select the first day of each work week.	<input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat First day of week: Monday Start time: 8:00 AM First week of year: Starts on Jan 1 End time: 5:00 PM
Time Format Specify whether you want to use 12-hour time format or 24-hour format.	Time format: 12 Hour

There are number of settings that you can make to ensure that your WSF 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.

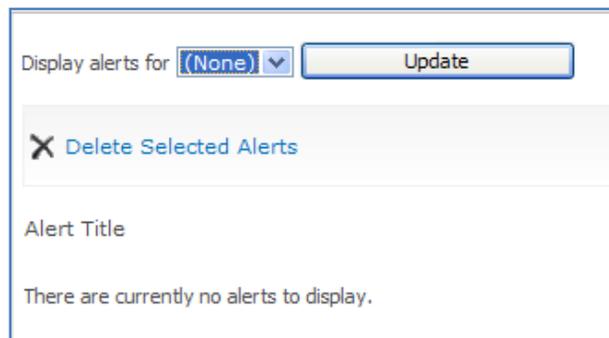
6.20 Lists and Libraries

Chapter 6 – Site settings



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.

6.22 User Alerts



It is possible with WSF for users to configure alerts to inform them when changes to specific parts of WSF 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.

6.23 RSS

Chapter 6 – Site settings

Enable RSS	<input checked="" type="checkbox"/> Allow RSS feeds in this site
Advanced Settings Specify the site-wide channel elements for the RSS feeds.	Copyright: <input type="text"/> Managing Editor: <input type="text"/> Webmaster: <input type="text"/> Time To Live (minutes): <input type="text" value="60"/>

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 2010 for example). Just about every component of WSF is RSS enabled, allowing information to be pushed out to clients who can view updates without necessarily having to visit the WSF 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 and Offline Visibility

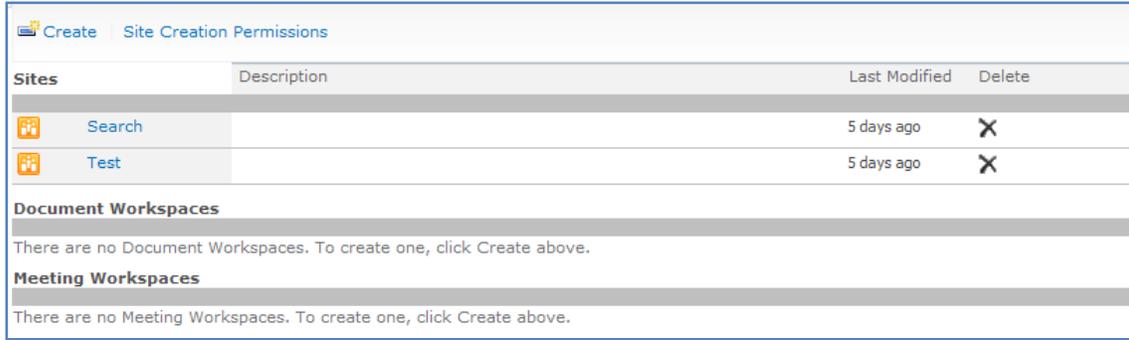
Indexing Site Content Specify whether this site should be visible in search results. If a site is not visible to search, then content from that site and all of its subsites will not appear in search results.	Allow this site to appear in search results? <input checked="" type="radio"/> Yes <input type="radio"/> No
Indexing ASPX Page Content The text of the items displayed on ASPX pages is often included in search results. If individual items on the pages on this site are secured by using permissions that are more restrictive than the page itself, unauthorized users might see this restricted information in search results.	This site does not contain fine-grained permissions. Specify the site's ASPX page indexing behavior: <input checked="" type="radio"/> Do not index Web Parts if this site contains fine-grained permissions <input type="radio"/> Always index all Web Parts on this site <input type="radio"/> Never index any Web Parts on this site
Offline Client Availability Specify whether this site should be available for offline clients.	Allow items from this site to be downloaded to offline clients? <input checked="" type="radio"/> Yes <input type="radio"/> No

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.

6.25 Sites and Workspaces

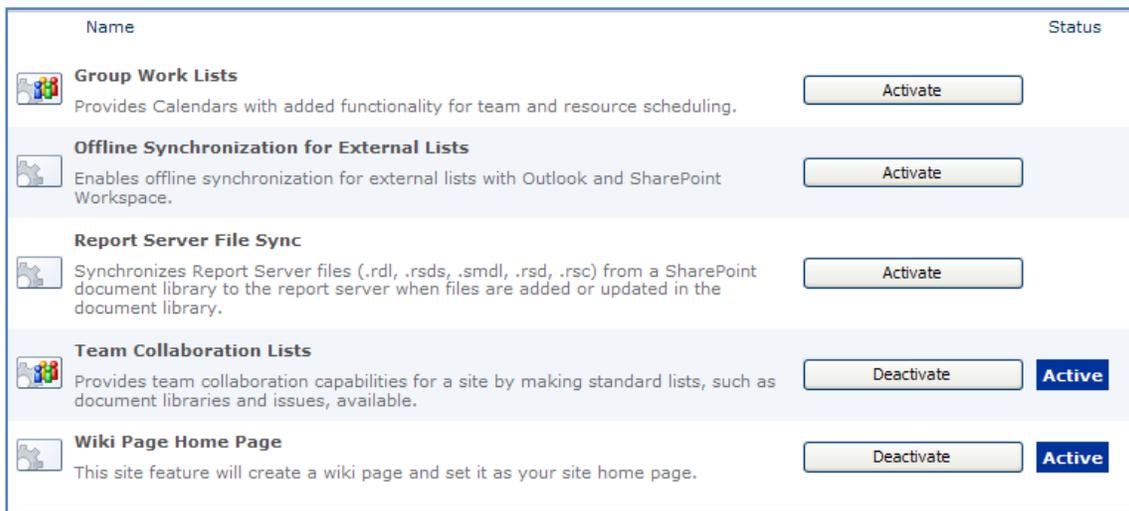
Chapter 6 – Site settings



Your WSF 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*.

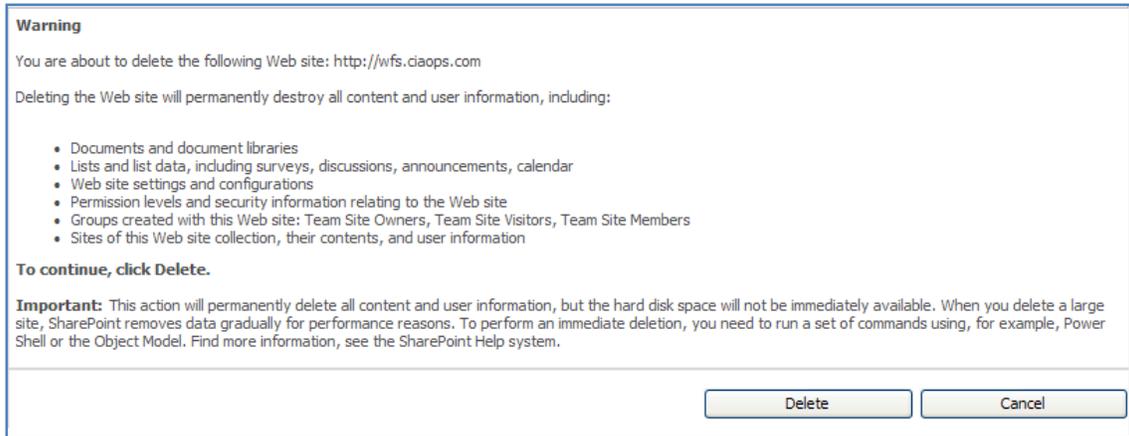
6.26 Site features



Site features extend the functionality of the WSF 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

Chapter 6 – Site settings



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 WSF collection unusable.

6.28 Site Collection recycle bin

Type	Name	Original Location	Deleted By	Created By	Deleted	Size
<input type="checkbox"/>	ServerWeb.xml	/SiteAssets	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:58 PM	72.1 KB
<input type="checkbox"/>	ServerEnterprise.xml	/SiteAssets	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	72.2 KB
<input type="checkbox"/>	setupact.log	/SiteAssets	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	14 KB
<input type="checkbox"/>	vmgcoinstall.log	/SiteAssets	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	7 KB
<input type="checkbox"/>	WindowsUpdate(2010-09-17_13-49-15_43293).log	/SiteAssets	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	996.4 KB
<input type="checkbox"/>	WindowsUpdate.log	/SiteAssets	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	996.4 KB
<input type="checkbox"/>	ServerEnterprise.xml	/Shared Documents	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	72.1 KB
<input type="checkbox"/>	system.ini	/Shared Documents	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	< 1 KB
<input type="checkbox"/>	vmgcoinstall.log	/Shared Documents	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	7 KB
<input type="checkbox"/>	WindowsUpdate.log	/Shared Documents	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:56 PM	996.4 KB
<input type="checkbox"/>	setupact.log	/Shared Documents	CIASVR02 \administrator	CIASVR02 \administrator	17/09/2010 1:52 PM	13.9 KB

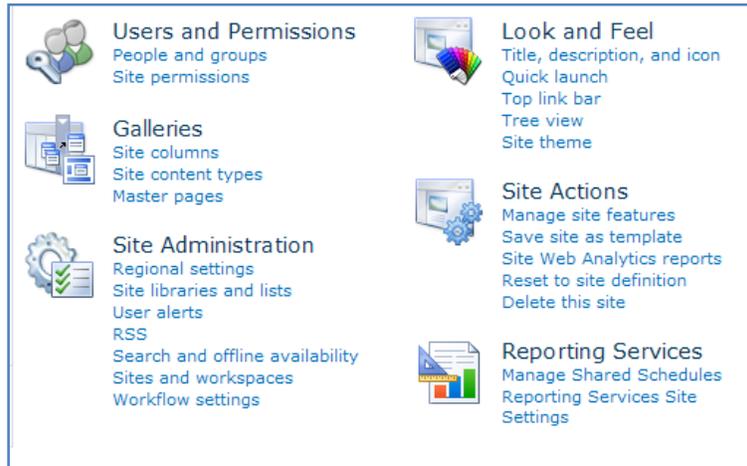
When a user deletes most things (excluding sub-sites) from WSF it will initially be sent to their WSF recycle bin so it can be recovered quickly if required. After the default 30 days the end user recycle bin is emptied and the information is transferred to the *Site Collection Recycle bin*.

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.

Chapter 6 – Site settings

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.

6.32 Sub-site settings



You will notice that if you go into the site settings in a WSF sub-site the menu will all appear the same except for the *Site Collection Administration* heading.

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.